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# METHODOLOGY

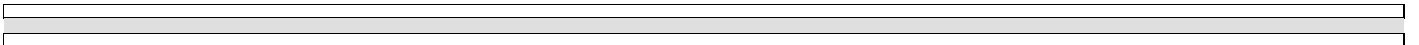
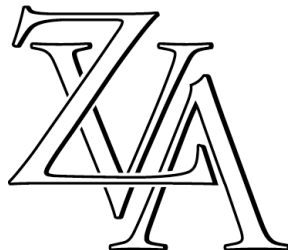
## TARGET MARKET TABLES — Appendices One and Two —

### An Update of Residential Market Potential

Downtown Macon Study Area  
Macon-Bibb County, Georgia

February, 2025

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Residential Market Analysis Across the Urban-to-Rural Transect

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## METHODOLOGY

### AN UPDATE OF RESIDENTIAL MARKET POTENTIAL

Downtown Macon Study Area

*Macon-Bibb County, Georgia*

February, 2025

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The technical analysis to re-evaluate the market potential for new mixed-income housing units within Downtown Macon in Macon-Bibb County, Georgia, included the confirmation or update of the following:

- The draw areas for new and existing housing units within Macon-Bibb County, based on the most recently available county-to-county migration data from the Internal Revenue Service, and incorporating additional data from the most recent American Community Survey for the county, as well as other market dynamics;
- The depth and breadth of the potential housing market by tenure (rental and ownership) and by type (multi-family and single-family attached and detached units);
- The composition of the potential housing market (empty-nesters/retirees, traditional and non-traditional families, younger singles/couples); and
- The incomes and financial capabilities of the potential housing market (income distribution based on HUD's 2024 income limits for below 30 percent AMI, between 30 and 60 percent AMI, between 60 and 80 percent AMI, between 80 and 100 percent AMI, and above 100 percent AMI).

The original Downtown study was published in April, 2008, followed by updates published in August, 2014, and May, 2019.

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### **CONFIRMATION OF THE DRAW AREAS (MIGRATION ANALYSIS)—**

Analysis of migration, mobility, demographic and lifestyle characteristics of households currently living within defined draw areas is integral to the determination of the depth and breadth of the potential market for new housing within Macon-Bibb County and the Downtown Study Area.

Taxpayer migration data obtained from the Internal Revenue Service provide the framework for the confirmation of the draw areas—the principal counties of origin for households that are likely to move to Macon-Bibb County. These data are maintained at the county and “county equivalent” level by the Internal Revenue Service and provide a clear representation of mobility patterns. The IRS household migration data have been supplemented by population migration and mobility data for Macon-Bibb County from the most recent American Community Survey.

Historically, American households, more than any other nation’s, have been extraordinarily mobile. In general, household mobility is higher in urban areas; a greater percentage of renters move than owners; and a greater percentage of younger households move than older households.

Nationally, one lingering consequence of the Great Recession (officially December, 2007 through June, 2009) has been a considerable reduction in mobility. However, according to the American Community Survey, which measures population mobility, Macon-Bibb County—where just over 16 percent of the county’s population either moved within or to the county between 2022 and 2023—has a significantly higher mobility rate than the national average of 12 percent.

Appendix One, Table 1.

#### **Migration Trends—**

The update of Macon-Bibb County migration and mobility patterns from 2017 through 2021—the most recent data available from the Internal Revenue Service—shows that the number of households moving into the county was at its highest in 2021 at 4,430 households, rising from a low of 3,525 households in 2018. To the south, Houston County consistently accounted for 12.4 to 15.2 percent of household migration into Macon-Bibb County. Jones and Monroe Counties, to the north, each contributed a steady share of in-migration over the study period, from 5.7 to 7.3 percent for Jones County, and between just over four percent and 6.4 percent for Monroe County. All other

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counties individually accounted for less than four percent of household migration into Macon-Bibb County. (*Reference* Appendix One, Table 1.)

Households moving out of the county reached a five-year peak of 4,335 out-migrating households in 2021, rising from a low of 3,775 households in 2018. A significant percentage of out-migrating households have moved to Houston County, which received between 15.9 and 17.2 percent of Macon-Bibb County movers. Migration to Jones and Monroe Counties has also been notable, ranging between approximately 5.7 and 7.5 percent to Jones County, and 5.3 and 7.1 percent to Monroe County over the study period.

Net migration—the difference between households moving into the county and those moving out—continued to show net losses until 2020 when it started showing gains. Net losses ranged from a low of 210 households in 2017 to a high of 360 households in 2019. In 2020, a small gain of 40 households occurred. Then, in 2021, there was the study period’s highest net gain of 95 households.

NOTE: Although net migration provides insights into a county’s historical ability to attract or retain households compared to other locations, it is those households likely to move into a county (gross in-migration) that represent that county’s external market potential.

Based on the Macon-Bibb County migration data, then, supplemented by American Community Survey data, the draw areas for Macon-Bibb County have been confirmed as follows:

- The county draw area, covering households who are living within Macon-Bibb County.
- The regional draw area, covering households with the potential to move to Macon-Bibb County from Jones and Monroe counties.
- The Houston County draw area, covering households with the potential to move to Macon-Bibb County from Houston County, Georgia.
- The national draw area, covering households with the potential to move to Macon-Bibb County from all other U.S. counties.

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### Migration Methodology:

County-to-county migration is based on the year-to-year changes in the addresses shown on the population of returns from the Internal Revenue Service Individual Master File system. Data on migration patterns by county, or county equivalent, for the entire United States, include inflows and outflows. The data include the number of returns (which can be used to approximate the number of households), and the median and average incomes reported on the returns. American Community Survey data are also used to clarify migration and mobility patterns for geographic units smaller than the county level.

### **2025 TARGET MARKET CLASSIFICATION OF COUNTY HOUSEHOLDS—**

Demographic and geo-demographic data obtained from Claritas, Inc. provide the framework for the categorization of households, not only by lifestage and demographic characteristics, but also by lifestyle preferences and socio-economic factors. For purposes of this update, households of all incomes are included in the analysis. An appendix containing detailed descriptions of each of the target market households is provided along with the study.

The three main lifestages are:

- Younger singles and couples, largely one- and two-person households with the head of household typically aged between 20 and 40, comprised now mainly of the very large Millennial generation, who were born between 1977 and 1996. Through sheer numbers the housing and lifestyle choices of the Millennials have had, and will continue to have, a profound effect on the nation as a whole and cities in particular. Those in the leading edge of the Zoomers, also known as Generation Z, the next generation following the Millennials, are now 27 years old and having a noticeable impact on this lifestage's housing preferences.
- Families, comprising both “traditional” families (married couples with one or more children) and “non-traditional” families (a wide range of family households, from a single parent with one or more children, an adult caring for younger siblings, to a grandparent with custody of grandchildren), still primarily Generation X, born

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between 1965 and 1976. However, the leading edge Millennials are now in their 40s, are marrying and having children, and are moving into the family lifestage.

- Empty nesters and retirees, largely one- and two-person households with the head of household typically aged over 50, primarily encompassing the Baby Boom generation, born between 1946 and 1964, as well as earlier generations. It is now the third largest generation in America, but as the Boomer generation ages, it will continue to have a significant impact on the nation's housing, particularly how Baby Boomers manage the consequences of aging. The oldest Generation Xers are now in their late-fifties, joining the Baby Boomers as empty nesters when their children leave home.

Appendix One, Table 2.

#### **Target Market Classification—**

In 2025, an estimated 63,620 households live in Macon-Bibb County, an increase of 4,575 households or 7.7 percent from 2019. The county median income is estimated at \$46,000, \$6,300 or 16 percent higher than 2019, but 41 percent or \$32,400 below the national median of \$78,400. The median reported value of owner-occupied dwelling units in the county is estimated at \$208,300, \$86,700 higher than in 2019, but still \$154,500 under the national median of \$362,800.

As characterized by lifestage, in 2025, just over 39 percent of Macon-Bibb County's households are empty nesters and retirees (in 21 target market groups), 30.6 percent are younger singles and couples (in 12 market groups), and the remaining 30.3 percent are traditional and non-traditional families (in 19 groups). (*Reference* Appendix One, Table 2.)

#### Residential Target Market Methodology:

The proprietary residential target market methodology, developed by Zimmerman/Volk Associates in 1988 and continually refined, is an analytical technique, using the PRIZM household clustering system, that establishes the optimum market position for residential development of any property—from a specific site to an entire political jurisdiction—through cluster analysis of households living within designated draw areas. In contrast to conventional supply/demand analysis—which is based

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on supply-side dynamics and baseline demographic projections—the residential target market analysis establishes the optimum market position derived from the housing and lifestyle preferences of households in the draw area and within the framework of the local housing market context. Because it is based on detailed and location-specific household data, the residential target market methodology can establish the optimum market position even in locations where no closely-comparable properties exist.

In residential target market methodology, clusters of households (usually between 10 and 15) are grouped according to a variety of significant “predictable variables,” ranging from basic demographic characteristics, such as income qualification and age, to less-frequently considered attributes known as “behaviors,” such as mobility rates, lifestage, and lifestyle patterns.

Mobility rates detail how frequently a household moves from one dwelling unit to another.

Lifestage denotes what stage of life the household is in, from initial household formation (typically when a young person moves out of his or her parents’ household into his or her own dwelling unit), through family formation (typically, marriage and children), empty-nesting (after the last adult child has left the household), to retirement (typically, no longer employed).

Lifestyle patterns reflect the ways households choose to live, *e.g.*—an urban lifestyle includes residing in a dwelling unit in a town, most likely high-density, and implies the ability to walk to more activities and locations than a suburban lifestyle, which is most likely lower-density and typically requires an automobile to access non-residential locations.

Zimmerman/Volk Associates has refined the analysis of these household clusters through the correlation of more than 500 data points related to housing preferences and consumer and lifestyle characteristics.

As a result of this process, Zimmerman/Volk Associates has categorized the housing and neighborhood propensities of 68 target market groups, the most affluent of which can afford the most expensive new ownership units and the least affluent are candidates for the least expensive

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existing rental apartments; a sizable percentage of the latter group require some form of housing assistance.

Once the draw areas for a property have been defined, then—through field investigation, analysis of historical migration and development trends, and employment and commutation patterns—the households within those areas are quantified using the residential target market methodology. The potential market for new dwelling units is determined by the correlation of a number of factors—including, but not limited to: household mobility rates; incomes; lifestyle characteristics and housing preferences; site location and conditions; and the current housing market context.

#### **AVERAGE ANNUAL POTENTIAL MARKET FOR MACON-BIBB COUNTY (MOBILITY ANALYSIS)—**

The mobility tables, individually and in summaries, indicate the annual average number and type of households that have the potential to move within or to Macon-Bibb County each year over the next five years. The total number of households with the potential to move from each county is derived from historical migration trends; the number of households from each group is calculated from each group's mobility rate. Because of the consolidation of the City of Macon with Bibb County in 2014, data based on the old municipal boundaries has no longer been available since 2020. Therefore, the average annual potential market for the City of Macon cannot be comparably updated.

Appendix One, Table 3.

#### **Internal Mobility (Households Moving within Macon-Bibb County)—**

Zimmerman/Volk Associates integrates U.S. Bureau of the Census data from the American Community Survey with data from Claritas Inc. to determine the number of households in each target market group that will move from one residence to another within a specific area or jurisdiction in a given year (internal mobility).

After updating the migration and mobility data, Zimmerman/Volk Associates has determined that an annual average of 5,620 households of all incomes living in Macon-Bibb County have the potential to move from one residence to another—rental or ownership, new or resale—within the county each year over the next five years.

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Nearly 48 percent of these households are likely to be younger singles and couples (in 12 market groups); just under 31 percent are likely to be traditional and non-traditional families (in 19 groups); and the remaining 21.2 percent are likely to be empty nesters and retirees (in 19 groups).

Appendix One, Tables 4 through 6; Appendix Two, Tables 1 and 2.

**External Mobility** (Households Moving to Macon-Bibb County from Outside)—

These tables determine the number of households in each target market group living in Jones and Monroe counties (the regional draw area), Houston County (the Houston County draw area), and the balance of the United States that are likely to move to Macon-Bibb County each year over the next five years (through a correlation of Claritas data, U.S. Bureau of the Census data, and the Internal Revenue Service and American Community Survey migration and mobility data).

Appendix One, Table 7.

**Average Annual Market Potential for Macon-Bibb County**—

This table summarizes Appendix One, Tables 3 through 6. The numbers in the Total column on page one of this table indicate the depth and breadth of the potential market for new and existing dwelling units in Macon-Bibb County each year over the next five years originating from households living in the designated draw areas. An annual average of 9,540 households of all incomes have the potential to move within or to the county each year over the next five years.

Younger singles and couples (in all 17 of Zimmerman/Volk Associates' younger target market groups) are likely to account for 44.8 percent of the market, traditional and non-traditional families (in all 25 family groups) account for another 32.8 percent, and the remaining 22.4 percent would be empty nesters and retirees (in all 26 empty nester/retiree groups).

The distribution of the draw areas as a percentage of the annual potential market for new and existing housing units in Macon-Bibb County is shown on the table following this page.

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Average Annual Market Potential by Draw Area  
Macon-Bibb County, Georgia

|   |              |
|---|--------------|
| Macon-Bibb County (Local Draw Area):            | 58.9%        |
| Jones and Monroe Counties (Regional Draw Area): | 4.8%         |
| Houston County (Houston County Draw Area):      | 5.7%         |
| Balance of US (National Draw Area):             | <u>30.6%</u> |
| Total:  | 100.0%       |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

**UPDATE OF THE AVERAGE ANNUAL POTENTIAL MARKET FOR THE DOWNTOWN MACON STUDY AREA—**

The average annual potential market for new and existing housing units within the Downtown Macon Study Area includes the same draw areas as for the county as a whole. Zimmerman/Volk Associates uses U.S. Bureau of the Census data, combined with Claritas data, to determine which target market groups, as well as how many households within each group, are likely to move to the Study Area each year over the next five years.

Appendix One, Tables 8 through 15.

**Average Annual Market Potential for the Downtown Macon Study Area—**

As updated by the target market methodology, then, an annual average of 2,825 of the 9,540 households that represent the annual market for new and existing housing units in Macon-Bibb County are a market for housing units of any kind located within the Downtown Macon Study Area. This represents an increase of 225 households (8.7 percent) from 2019. Nearly 54 percent of these households are likely to be younger singles and couples (in 13 target market groups), 31.2 percent are likely to be empty nesters and retirees (in 17 groups), and the remaining 15 percent are likely to be traditional and non-traditional families (in 14 groups). (*Reference* Appendix One, Table 8.)

The distribution of the draw areas as a percentage of the potential market for new and existing housing units in the Downtown Macon Study Area is shown on the table following this page.

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Average Annual Market Potential by Draw Area  
The Downtown Macon Study Area  
Bibb County, Georgia

|   |              |
|---|--------------|
| Macon-Bibb County (Local Draw Area):            | 51.3%        |
| Jones and Monroe Counties (Regional Draw Area): | 0.4%         |
| Houston County (Houston County Draw Area):      | 6.0%         |
| Balance of US (National Draw Area):             | <u>42.3%</u> |
| Total:  | 100.0%       |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

The annual average of 2,825 draw area households that have the potential to move to new and existing housing units within the Downtown Macon Study Area each year over the next five years have been categorized by tenure propensities to determine renter/owner ratios. An estimated 63.2 percent of these households (or 1,784 households) comprise the average annual potential market for multi-family rental units. The remaining 36.8 percent (1,041 households) comprise the annual potential market for for-sale (ownership) housing units. (Reference Appendix One, Table 9.)

Of these 1,041 potential buyer households, just 21 percent (or 219 households) comprise the annual potential market for multi-family for-sale units (condominium/lofts/apartments); 25.9 percent (269 households) comprise the market for attached single-family (townhouse/rowhouse/duplex) units; and the remaining 53.1 percent (553 households) comprise the market for single-family detached houses. (Reference Appendix One, Table 10.)

The income limits in Macon-Bibb County by household size and percent of median family income, based on the Macon-Bibb County, GA Metro FMR area median family income (AMI), which, as determined by the U.S. Department of Housing and Urban Development (HUD) in 2024, is \$70,700, for a family of four, are shown on the table following this page.

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Fiscal Year 2024 Income Limits  
Macon-Bibb County, Georgia

| NUMBER OF PERSONS<br>IN HOUSEHOLD | EXTREMELY LOW<br>30% OF MEDIAN* | VERY LOW<br>50% OF MEDIAN* | LOW<br>80% OF MEDIAN |
|-----------------------------------|---------------------------------|----------------------------|----------------------|
| One                               | \$15,060                        | \$24,750                   | \$39,600             |
| Two                               | \$20,440                        | \$28,300                   | \$45,250             |
| Three                             | \$25,820                        | \$31,850                   | \$50,900             |
| Four                              | \$31,200                        | \$35,350                   | \$56,550             |
| Five                              | \$36,580                        | \$38,200                   | \$61,100             |
| Six                               | \$41,050                        | \$41,050                   | \$65,600             |
| Seven                             | \$43,850                        | \$43,850                   | \$70,150             |
| Eight                             | \$46,700                        | \$46,700                   | \$74,650             |

\*NOTE: The FY 2014 Consolidated Appropriations Act changed the definition of extremely low income to be the greater of 30/50ths (60%) of the Section 8 very low income limit or the poverty guideline as established by the Department of Health and Human Services (HHS), provided that this amount is not greater than the Section 8 50% very low-income limit. Consequently, the extremely low income limits may equal the very low (50%) income limits.

SOURCE: U.S. Department of Housing and Urban Development.

This study is examining the incomes and financial capabilities of the potential housing market based on income distributions at less than 30 percent AMI, between 30 and 60 percent AMI, between 60 and 80 percent AMI, between 80 and 100 percent AMI, and above 100 percent AMI. The incomes of households at 60 and 100 percent of median are shown on the following table:

Additional Income Limits  
Macon-Bibb County, Georgia

| NUMBER OF PERSONS<br>IN HOUSEHOLD | 60% OF MEDIAN | 100% OF MEDIAN |
|-----------------------------------|---------------|----------------|
| One                               | \$29,700      | \$49,500       |
| Two                               | \$33,950      | \$56,600       |
| Three                             | \$38,200      | \$63,650       |
| Four                              | \$42,400      | \$70,700       |
| Five                              | \$45,800      | \$76,400       |
| Six                               | \$49,200      | \$82,050       |
| Seven                             | \$52,600      | \$87,700       |
| Eight                             | \$56,000      | \$93,350       |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

The 1,784 renter households have been grouped by income on the following page, using income limits derived from the preceding table. (Reference Appendix One, Table 11.)

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Renter Households By Income  
 The Downtown Macon Study Area  
 Macon-Bibb County, Georgia

| INCOME BAND              | NUMBER OF HOUSEHOLDS | PERCENTAGE   |
|--------------------------|----------------------|--------------|
| Below 30% AMI            | 466                  | 26.1%        |
| Between 30% and 60% AMI  | 318                  | 17.8%        |
| Between 60% and 80% AMI  | 193                  | 10.8%        |
| Between 80% and 100% AMI | 150                  | 8.4%         |
| Above 100% AMI           | <u>657</u>           | <u>36.9%</u> |
| Total:                   | 1,784                | 100.0%       |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

The remaining 36.8 percent of the average annual potential market (or 1,041 households) comprise the market for new for-sale (ownership) housing units in the Downtown Macon Study Area. These households have also been grouped by income, as detailed on the following table (*reference* Appendix One, Table 12):

Owner Households By Income  
 The Downtown Macon Study Area  
 Macon-Bibb County, Georgia

| INCOME BAND              | NUMBER OF HOUSEHOLDS | PERCENTAGE   |
|--------------------------|----------------------|--------------|
| Below 30% AMI            | 195                  | 18.7%        |
| Between 30% and 60% AMI  | 137                  | 13.2%        |
| Between 60% and 80% AMI  | 95                   | 9.1%         |
| Between 80% and 100% AMI | 81                   | 7.8%         |
| Above 100% AMI           | <u>533</u>           | <u>51.2%</u> |
| Total:                   | 1,041                | 100.0%       |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

Of the 1,041 potential owner households, 219 households (21 percent) comprise the market for multi-family for-sale units (condominium/cooperative lofts/apartments) and have also been grouped by income as shown on the table following this page. (*Reference* Appendix One, Table 13.)

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Multi-Family Owner Households By Income  
The Downtown Macon Study Area  
Macon-Bibb County, Georgia

| INCOME BAND              | NUMBER OF HOUSEHOLDS | PERCENTAGE   |
|--------------------------|----------------------|--------------|
| Below 30% AMI            | 49                   | 22.4%        |
| Between 30% and 60% AMI  | 33                   | 15.1%        |
| Between 60% and 80% AMI  | 21                   | 9.6%         |
| Between 80% and 100% AMI | 17                   | 7.7%         |
| Above 100% AMI           | <u>99</u>            | <u>45.2%</u> |
| Total:                   | 219                  | 100.0%       |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

Of the 1,041 potential owner households, 269 households (25.9 percent) comprise the market for single-family attached for-sale units (rowhouses/townhouses/duplexes) and have also been grouped by income as shown on the following table (reference Appendix One, Table 14):

Single-Family Attached Owner Households By Income  
The Downtown Macon Study Area  
Macon-Bibb County, Georgia

| INCOME BAND              | NUMBER OF HOUSEHOLDS | PERCENTAGE   |
|--------------------------|----------------------|--------------|
| Below 30% AMI            | 57                   | 21.2%        |
| Between 30% and 60% AMI  | 38                   | 14.1%        |
| Between 60% and 80% AMI  | 23                   | 8.6%         |
| Between 80% and 100% AMI | 20                   | 7.4%         |
| Above 100% AMI           | <u>131</u>           | <u>48.7%</u> |
| Total:                   | 269                  | 100.0%       |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

Of the 1,041 potential owner households, 553 households (53.1 percent) comprise the market for single-family detached for-sale units (detached houses) and have also been grouped by income, as detailed on the table following this page. (Reference Appendix One, Table 15.)

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Single-Family Detached Owner Households By Income  
The Downtown Macon Study Area  
Macon-Bibb County, Georgia

| INCOME BAND              | NUMBER OF HOUSEHOLDS | PERCENTAGE   |
|--------------------------|----------------------|--------------|
| Below 30% AMI            | 89                   | 16.1%        |
| Between 30% and 60% AMI  | 66                   | 11.9%        |
| Between 60% and 80% AMI  | 51                   | 9.2%         |
| Between 80% and 100% AMI | 44                   | 8.0%         |
| Above 100% AMI           | <u>303</u>           | <u>54.8%</u> |
| Total:                   | 553                  | 100.0%       |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

—Target Market Data—

Target market data are based on the PRIZM household clustering system developed by Claritas, Inc., and modified and augmented by Zimmerman/Volk Associates as the basis for its proprietary residential target market methodology. Target market data provides number of households by cluster aggregated into the three main demographic categories—empty nesters and retirees; traditional and non-traditional families; and younger singles and couples.

Zimmerman/Volk Associates’ target market classifications are updated annually to reflect the slow, but relentless change in the composition of American households. Because of the nature of geo-demographic segmentation, a change in household classification is directly correlated with a change in geography, *i.e.*—a move from one neighborhood condition to another. However, these changes of classification can also reflect an alteration in one or more of three additional basic characteristics:

- Age;
- Household composition; and/or
- Economic status.

Age, of course, is the most predictable, and easily-defined of these changes. Household composition has also been relatively easy to define; recently, with the growth of non-traditional households, however, definitions of a family have had to be expanded and parsed into more highly-refined

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segments. Economic status remains clearly defined through measures of annual income and household wealth.

A change in classification is rarely induced by a change in just one of the four basic characteristics. This is one reason that the target household categories are so highly refined: they take in multiple characteristics. Even so, there are some rough equivalents in household types as they move from one neighborhood condition to another. There is, for example, a correlation between *Full-Nest Suburbanites* and *Full-Nest Exurbanites*; if a *Full-Nest Suburbanite* household moves to the exurbs, they become a *Full-Nest Exurbanite* household, if the move is not accompanied by a significant change in socio-economic status. In contrast, if a *Full-Nest Suburbanite* household moves within the metropolitan suburbs, and also improves their socio-economic standing, that household would likely be characterized as *Nouveau Money* or *Corporate Establishment*.

#### Household Classification Methodology:

Household classifications were originally based on the PRIZM geo-demographic segmentation system that was established by Claritas in 1974 and then replaced by PRIZM NE clustering system in 2005. The PRIZM PREMIER system now in place was updated in 2016 to include 68 household groups, each ranging between one and two and a half million households. The revised household classifications are based on PRIZM which was developed through unique classification and regression trees delineating 68 specific clusters of American households. The system is now accurate to the individual household level, adding self-reported and list-based household data to geo-demographic information. The process applies hundreds of demographic variables to nearly 10,000 “behaviors.”

Over the past 37 years, Zimmerman/Volk Associates has augmented the PRIZM cluster systems for use within the company’s proprietary residential target market methodology specific to housing and neighborhood preferences, with additional algorithms, correlation with geo-coded consumer data, aggregation of clusters by broad household definition, and unique cluster names.



METHODOLOGY: AN UPDATE OF RESIDENTIAL MARKET POTENTIAL

Downtown Macon Study Area  
Macon-Bibb County, Georgia

February, 2025

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## Appendix One Tables



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**Gross Annual Household In-Migration**

*Macon-Bibb County, Georgia*  
**2017, 2018, 2019, 2020, 2021**

| County of Origin           | ..... 2017 ..... |               | ..... 2018 ..... |               | ..... 2019 ..... |               | ..... 2020 ..... |               | ..... 2021 ..... |               |
|----------------------------|------------------|---------------|------------------|---------------|------------------|---------------|------------------|---------------|------------------|---------------|
|                            | <i>Number</i>    | <i>Share</i>  | <i>Number</i>    | <i>Share</i>  | <i>Number</i>    | <i>Share</i>  | <i>Number</i>    | <i>Share</i>  | <i>Number</i>    | <i>Share</i>  |
| Houston                    | 510              | 14.0%         | 510              | 14.5%         | 550              | 15.2%         | 555              | 13.4%         | 550              | 12.4%         |
| Jones                      | 265              | 7.3%          | 235              | 6.7%          | 240              | 6.6%          | 235              | 5.7%          | 275              | 6.2%          |
| Monroe                     | 235              | 6.4%          | 190              | 5.4%          | 170              | 4.7%          | 170              | 4.1%          | 190              | 4.3%          |
| Fulton                     | 100              | 2.7%          | 105              | 3.0%          | 95               | 2.6%          | 145              | 3.5%          | 140              | 3.2%          |
| DeKalb                     | 75               | 2.1%          | 60               | 1.7%          | 90               | 2.5%          | 130              | 3.1%          | 135              | 3.0%          |
| Henry                      | 60               | 1.6%          | 55               | 1.6%          | 75               | 2.1%          | 90               | 2.2%          | 135              | 3.0%          |
| Peach                      | 95               | 2.6%          | 105              | 3.0%          | 95               | 2.6%          | 95               | 2.3%          | 100              | 2.3%          |
| Gwinnett                   | 75               | 2.1%          | 50               | 1.4%          | 70               | 1.9%          | 75               | 1.8%          | 100              | 2.3%          |
| Clayton                    | 65               | 1.8%          | 50               | 1.4%          | 75               | 2.1%          | 75               | 1.8%          | 80               | 1.8%          |
| Cobb                       | 65               | 1.8%          | 40               | 1.1%          | 75               | 2.1%          | 85               | 2.1%          | 75               | 1.7%          |
| Baldwin                    | 80               | 2.2%          | 65               | 1.8%          | 80               | 2.2%          | 60               | 1.5%          | 70               | 1.6%          |
| Crawford                   | 85               | 2.3%          | 75               | 2.1%          | 60               | 1.7%          | 70               | 1.7%          | 70               | 1.6%          |
| Twiggs                     | 85               | 2.3%          | 95               | 2.7%          | 50               | 1.4%          | 85               | 2.1%          | 60               | 1.4%          |
| Chatham                    | 35               | 1.0%          | 45               | 1.3%          | 35               | 1.0%          | 45               | 1.1%          | 55               | 1.2%          |
| Broward, FL                | 20               | 0.5%          | 25               | 0.7%          | 25               | 0.7%          | 40               | 1.0%          | 40               | 0.9%          |
| Spalding                   | 0                | 0.0%          | 20               | 0.6%          | 20               | 0.6%          | 35               | 0.8%          | 35               | 0.8%          |
| Newton                     | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 25               | 0.6%          | 35               | 0.8%          |
| Laurens                    | 35               | 1.0%          | 30               | 0.9%          | 40               | 1.1%          | 40               | 1.0%          | 35               | 0.8%          |
| Wilkinson                  | 20               | 0.5%          | 25               | 0.7%          | 25               | 0.7%          | 25               | 0.6%          | 30               | 0.7%          |
| Miami-Dade, FL             | 35               | 1.0%          | 30               | 0.9%          | 0                | 0.0%          | 50               | 1.2%          | 30               | 0.7%          |
| Putnam                     | 25               | 0.7%          | 0                | 0.0%          | 20               | 0.6%          | 20               | 0.5%          | 30               | 0.7%          |
| Clarke                     | 20               | 0.5%          | 0                | 0.0%          | 20               | 0.6%          | 20               | 0.5%          | 30               | 0.7%          |
| Richmond                   | 20               | 0.5%          | 0                | 0.0%          | 25               | 0.7%          | 20               | 0.5%          | 30               | 0.7%          |
| Hillsborough, FL           | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 25               | 0.6%          | 25               | 0.6%          |
| Duval, FL                  | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 30               | 0.7%          | 25               | 0.6%          |
| Palm Beach, FL             | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 20               | 0.5%          | 25               | 0.6%          |
| Los Angeles, CA            | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 25               | 0.6%          |
| Butts                      | 0                | 0.0%          | 20               | 0.6%          | 0                | 0.0%          | 20               | 0.5%          | 25               | 0.6%          |
| Cook, IL                   | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 25               | 0.6%          |
| Muscogee                   | 20               | 0.5%          | 30               | 0.9%          | 30               | 0.8%          | 35               | 0.8%          | 20               | 0.5%          |
| Pinellas, FL               | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 20               | 0.5%          |
| Dougherty                  | 25               | 0.7%          | 0                | 0.0%          | 30               | 0.8%          | 25               | 0.6%          | 20               | 0.5%          |
| Lowndes                    | 20               | 0.5%          | 0                | 0.0%          | 30               | 0.8%          | 0                | 0.0%          | 20               | 0.5%          |
| All Other Counties         | 1,580            | 43.3%         | 1,665            | 47.2%         | 1,605            | 44.2%         | 1,790            | 43.3%         | 1,870            | 42.2%         |
| <b>Total In-Migration:</b> | <b>3,650</b>     | <b>100.0%</b> | <b>3,525</b>     | <b>100.0%</b> | <b>3,630</b>     | <b>100.0%</b> | <b>4,135</b>     | <b>100.0%</b> | <b>4,430</b>     | <b>100.0%</b> |

NOTE: All numbers have been rounded to the nearest five.

SOURCE: Internal Revenue Service;  
 Zimmerman/Volk Associates, Inc.

**Gross Annual Household Out-Migration***Macon-Bibb County, Georgia*  
**2017, 2018, 2019, 2020, 2021**

| Destination County          | ..... 2017 ..... |               | ..... 2018 ..... |               | ..... 2019 ..... |               | ..... 2020 ..... |               | ..... 2021 ..... |               |
|-----------------------------|------------------|---------------|------------------|---------------|------------------|---------------|------------------|---------------|------------------|---------------|
|                             | <i>Number</i>    | <i>Share</i>  | <i>Number</i>    | <i>Share</i>  | <i>Number</i>    | <i>Share</i>  | <i>Number</i>    | <i>Share</i>  | <i>Number</i>    | <i>Share</i>  |
| Houston                     | 625              | 16.2%         | 600              | 15.9%         | 645              | 16.2%         | 670              | 16.4%         | 745              | 17.2%         |
| Jones                       | 290              | 7.5%          | 250              | 6.6%          | 285              | 7.1%          | 275              | 6.7%          | 245              | 5.7%          |
| Monroe                      | 275              | 7.1%          | 230              | 6.1%          | 280              | 7.0%          | 245              | 6.0%          | 230              | 5.3%          |
| Fulton                      | 125              | 3.2%          | 125              | 3.3%          | 125              | 3.1%          | 170              | 4.2%          | 170              | 3.9%          |
| DeKalb                      | 105              | 2.7%          | 90               | 2.4%          | 110              | 2.8%          | 110              | 2.7%          | 110              | 2.5%          |
| Henry                       | 110              | 2.8%          | 110              | 2.9%          | 100              | 2.5%          | 130              | 3.2%          | 110              | 2.5%          |
| Peach                       | 120              | 3.1%          | 135              | 3.6%          | 115              | 2.9%          | 140              | 3.4%          | 140              | 3.2%          |
| Gwinnett                    | 75               | 1.9%          | 75               | 2.0%          | 70               | 1.8%          | 70               | 1.7%          | 80               | 1.8%          |
| Clayton                     | 70               | 1.8%          | 65               | 1.7%          | 75               | 1.9%          | 70               | 1.7%          | 70               | 1.6%          |
| Cobb                        | 90               | 2.3%          | 90               | 2.4%          | 115              | 2.9%          | 75               | 1.8%          | 125              | 2.9%          |
| Baldwin                     | 50               | 1.3%          | 70               | 1.9%          | 60               | 1.5%          | 55               | 1.3%          | 55               | 1.3%          |
| Crawford                    | 80               | 2.1%          | 85               | 2.3%          | 85               | 2.1%          | 80               | 2.0%          | 60               | 1.4%          |
| Twiggs                      | 85               | 2.2%          | 65               | 1.7%          | 60               | 1.5%          | 65               | 1.6%          | 60               | 1.4%          |
| Chatham                     | 40               | 1.0%          | 45               | 1.2%          | 50               | 1.3%          | 55               | 1.3%          | 50               | 1.2%          |
| Broward, FL                 | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          |
| Spalding                    | 0                | 0.0%          | 25               | 0.7%          | 25               | 0.6%          | 0                | 0.0%          | 0                | 0.0%          |
| Newton                      | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          |
| Laurens                     | 30               | 0.8%          | 35               | 0.9%          | 35               | 0.9%          | 30               | 0.7%          | 40               | 0.9%          |
| Wilkinson                   | 0                | 0.0%          | 0                | 0.0%          | 25               | 0.6%          | 0                | 0.0%          | 0                | 0.0%          |
| Miami-Dade, FL              | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 25               | 0.6%          | 0                | 0.0%          |
| Putnam                      | 25               | 0.6%          | 25               | 0.7%          | 25               | 0.6%          | 25               | 0.6%          | 0                | 0.0%          |
| Clarke                      | 0                | 0.0%          | 25               | 0.7%          | 20               | 0.5%          | 20               | 0.5%          | 25               | 0.6%          |
| Richmond                    | 25               | 0.6%          | 0                | 0.0%          | 25               | 0.6%          | 25               | 0.6%          | 25               | 0.6%          |
| Hillsborough, FL            | 25               | 0.6%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          |
| Duval, FL                   | 35               | 0.9%          | 25               | 0.7%          | 20               | 0.5%          | 25               | 0.6%          | 30               | 0.7%          |
| Palm Beach, FL              | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          |
| Los Angeles, CA             | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          |
| Butts                       | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          |
| Cook, IL                    | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          |
| Muscogee                    | 30               | 0.8%          | 20               | 0.5%          | 20               | 0.5%          | 30               | 0.7%          | 40               | 0.9%          |
| Pinellas, FL                | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          |
| Dougherty                   | 20               | 0.5%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          |
| Lowndes                     | 0                | 0.0%          | 20               | 0.5%          | 0                | 0.0%          | 0                | 0.0%          | 0                | 0.0%          |
| All Other Counties          | 1,530            | 39.6%         | 1,565            | 41.5%         | 1,620            | 40.6%         | 1,705            | 41.6%         | 1,925            | 44.4%         |
| <b>Total Out-Migration:</b> | <b>3,860</b>     | <b>100.0%</b> | <b>3,775</b>     | <b>100.0%</b> | <b>3,990</b>     | <b>100.0%</b> | <b>4,095</b>     | <b>100.0%</b> | <b>4,335</b>     | <b>100.0%</b> |

NOTE: All numbers have been rounded to the nearest five.

SOURCE: Internal Revenue Service;  
Zimmerman/Volk Associates, Inc.

**Net Annual Household Migration***Macon-Bibb County, Georgia*  
**2017, 2018, 2019, 2020, 2021**

| County                      | 2017<br>Number | 2018<br>Number | 2019<br>Number | 2020<br>Number | 2021<br>Number |
|-----------------------------|----------------|----------------|----------------|----------------|----------------|
| Houston                     | -115           | -90            | -95            | -115           | -195           |
| Jones                       | -25            | -15            | -45            | -40            | 30             |
| Monroe                      | -40            | -40            | -110           | -75            | -40            |
| Fulton                      | -25            | -20            | -30            | -25            | -30            |
| DeKalb                      | -30            | -30            | -20            | 20             | 25             |
| Henry                       | -50            | -55            | -25            | -40            | 25             |
| Peach                       | -25            | -30            | -20            | -45            | -40            |
| Gwinnett                    | 0              | -25            | 0              | 5              | 20             |
| Clayton                     | -5             | -15            | 0              | 5              | 10             |
| Cobb                        | -25            | -50            | -40            | 10             | -50            |
| Baldwin                     | 30             | -5             | 20             | 5              | 15             |
| Crawford                    | 5              | -10            | -25            | -10            | 10             |
| Twiggs                      | 0              | 30             | -10            | 20             | 0              |
| Chatham                     | -5             | 0              | -15            | -10            | 5              |
| Broward, FL                 | 20             | 25             | 25             | 40             | 40             |
| Spalding                    | 0              | -5             | -5             | 35             | 35             |
| Newton                      | 0              | 0              | 0              | 25             | 35             |
| Laurens                     | 5              | -5             | 5              | 10             | -5             |
| Wilkinson                   | 20             | 25             | 0              | 25             | 30             |
| Miami-Dade, FL              | 35             | 30             | 0              | 25             | 30             |
| Putnam                      | 0              | -25            | -5             | -5             | 30             |
| Clarke                      | 20             | -25            | 0              | 0              | 5              |
| Richmond                    | -5             | 0              | 0              | -5             | 5              |
| Hillsborough, FL            | -25            | 0              | 0              | 25             | 25             |
| Duval, FL                   | -35            | -25            | -20            | 5              | -5             |
| Palm Beach, FL              | 0              | 0              | 0              | 20             | 25             |
| Los Angeles, CA             | 0              | 0              | 0              | 0              | 25             |
| Butts                       | 0              | 20             | 0              | 20             | 25             |
| Cook, IL                    | 0              | 0              | 0              | 0              | 25             |
| Muscogee                    | -10            | 10             | 10             | 5              | -20            |
| Pinellas, FL                | 0              | 0              | 0              | 0              | 20             |
| Dougherty                   | 5              | 0              | 30             | 25             | 20             |
| Lowndes                     | 20             | -20            | 30             | 0              | 20             |
| All Other Counties          | 50             | 100            | -15            | 85             | -55            |
| <b>Total Net Migration:</b> | <b>-210</b>    | <b>-250</b>    | <b>-360</b>    | <b>40</b>      | <b>95</b>      |

NOTE: All numbers have been rounded to the nearest five.

SOURCE: Internal Revenue Service;  
Zimmerman/Volk Associates, Inc.

## 2025 Household Classification by Market Groups

*Macon-Bibb County, Georgia*

| Household Type/<br>Geographic Designation             | <i>Estimated<br/>Number</i> | <i>Estimated<br/>Share</i> |
|---|-----------------------------|----------------------------|
| <b>Empty Nesters<br/>&amp; Retirees</b>               | <b>24,870</b>               | <b>39.1%</b>               |
| <i>Metropolitan Cities</i>                            | 0                           | 0.0%                       |
| <i>Small Cities/Satellite Cities</i>                  | 9,360                       | 14.7%                      |
| <i>Metropolitan Suburbs</i>                           | 3,215                       | 5.1%                       |
| <i>Town &amp; Country/Exurbs</i>                      | 12,295                      | 19.3%                      |
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>19,260</b>               | <b>30.3%</b>               |
| <i>Metropolitan Cities</i>                            | 0                           | 0.0%                       |
| <i>Small Cities/Satellite Cities</i>                  | 3,575                       | 5.6%                       |
| <i>Metropolitan Suburbs</i>                           | 2,040                       | 3.2%                       |
| <i>Town &amp; Country/Exurbs</i>                      | 13,645                      | 21.4%                      |
| <b>Younger<br/>Singles &amp; Couples</b>              | <b>19,490</b>               | <b>30.6%</b>               |
| <i>Metropolitan Cities</i>                            | 0                           | 0.0%                       |
| <i>Small Cities/Satellite Cities</i>                  | 11,255                      | 17.7%                      |
| <i>Metropolitan Suburbs</i>                           | 2,615                       | 4.1%                       |
| <i>Town &amp; Country/Exurbs</i>                      | 5,620                       | 8.8%                       |
| <b>Total:</b>   | <b>63,620</b>               | <b>100.0%</b>              |
| <b>2025 Estimated Median Income:</b>                  | <b>\$46,000</b>             |                            |
| <b>2025 Estimated National Median Income:</b>         | <b>\$78,400</b>             |                            |
| <b>2025 Estimated Median Home Value:</b>              | <b>\$208,300</b>            |                            |
| <b>2025 Estimated National Median Home Value:</b>     | <b>\$362,800</b>            |                            |

## 2025 Household Classification by Market Groups

Macon-Bibb County, Georgia

|   | <i>Estimated<br/>Number</i> | <i>Estimated<br/>Share</i> | <i>Estimated<br/>Median<br/>Income</i> | <i>Estimated<br/>Median<br/>Home Value</i> |
|---|-----------------------------|----------------------------|--|--|
| <b>Empty Nesters<br/>&amp; Retirees</b> | <b>24,870</b>               | <b>39.1%</b>               |  |  |
| <i>Metropolitan Cities</i>              |                             |                            |  |  |
| The Social Register                     | 0                           | 0.0%                       |  |  |
| Urban Establishment                     | 0                           | 0.0%                       |  |  |
| Multi-Ethnic Empty Nesters              | 0                           | 0.0%                       |  |  |
| Cosmopolitan Couples                    | 0                           | 0.0%                       |  |  |
| <i>Subtotal:</i>                        | <u>0</u>                    | <u>0.0%</u>                |  |  |
| <i>Small Cities/Satellite Cities</i>    |                             |                            |  |  |
| Second City Establishment               | 420                         | 0.7%                       | \$90,300                               | \$369,400                                  |
| Blue-Collar Retirees                    | 860                         | 1.4%                       | \$54,300                               | \$170,500                                  |
| Middle-Class Move-Downs                 | 250                         | 0.4%                       | \$51,800                               | \$207,800                                  |
| Hometown Seniors                        | 4,900                       | 7.7%                       | \$28,500                               | \$109,400                                  |
| Second City Seniors                     | 2,930                       | 4.6%                       | \$25,800                               | \$154,700                                  |
| <i>Subtotal:</i>                        | <u>9,360</u>                | <u>14.7%</u>               |  |  |
| <i>Metropolitan Suburbs</i>             |                             |                            |  |  |
| The One Percenters                      | 45                          | 0.1%                       | \$147,400                              | \$612,600                                  |
| Old Money                               | 60                          | 0.1%                       | \$137,100                              | \$689,600                                  |
| Affluent Empty Nesters                  | 0                           | 0.0%                       |  |  |
| Suburban Establishment                  | 655                         | 1.0%                       | \$102,900                              | \$326,900                                  |
| Mainstream Empty Nesters                | 710                         | 1.1%                       | \$72,100                               | \$225,900                                  |
| Middle-American Retirees                | 1,745                       | 2.7%                       | \$70,600                               | \$251,000                                  |
| <i>Subtotal:</i>                        | <u>3,215</u>                | <u>5.1%</u>                |  |  |
| <i>Town &amp; Country/Exurbs</i>        |                             |                            |  |  |
| Small-Town Patriarchs                   | 1,395                       | 2.2%                       | \$116,700                              | \$443,700                                  |
| Pillars of the Community                | 910                         | 1.4%                       | \$102,600                              | \$306,000                                  |
| New Empty Nesters                       | 320                         | 0.5%                       | \$106,700                              | \$442,700                                  |
| Traditional Couples                     | 1,050                       | 1.7%                       | \$103,900                              | \$392,200                                  |
| RV Retirees                             | 650                         | 1.0%                       | \$82,600                               | \$227,800                                  |
| Country Couples                         | 2,530                       | 4.0%                       | \$71,900                               | \$229,500                                  |
| Hometown Retirees                       | 300                         | 0.5%                       | \$64,500                               | \$168,200                                  |
| Heartland Retirees                      | 210                         | 0.3%                       | \$63,000                               | \$204,000                                  |
| Village Elders                          | 1,205                       | 1.9%                       | \$37,500                               | \$184,500                                  |
| Small-Town Seniors                      | 2,680                       | 4.2%                       | \$36,600                               | \$147,300                                  |
| Back Country Seniors                    | 1,045                       | 1.6%                       | \$34,300                               | \$125,100                                  |
| <i>Subtotal:</i>                        | <u>12,295</u>               | <u>19.3%</u>               |  |  |

## 2025 Household Classification by Market Groups

Macon-Bibb County, Georgia

|   | <i>Estimated<br/>Number</i> | <i>Estimated<br/>Share</i> | <i>Estimated<br/>Median<br/>Income</i> | <i>Estimated<br/>Median<br/>Home Value</i> |
|---|-----------------------------|----------------------------|--|--|
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>19,260</b>               | <b>30.3%</b>               |  |  |
| <i>Metropolitan Cities</i>                            |                             |                            |  |  |
| e-Type Families                                       | 0                           | 0.0%                       |  |  |
| Multi-Cultural Families                               | 0                           | 0.0%                       |  |  |
| Inner-City Families                                   | 0                           | 0.0%                       |  |  |
| Single-Parent Families                                | 0                           | 0.0%                       |  |  |
| <i>Subtotal:</i>                                      | <u>0</u>                    | <u>0.0%</u>                |  |  |
| <i>Small Cities/Satellite Cities</i>                  |                             |                            |  |  |
| Unibox Transferees                                    | 465                         | 0.7%                       | \$103,000                              | \$360,200                                  |
| Multi-Ethnic Families                                 | 390                         | 0.6%                       | \$75,700                               | \$276,800                                  |
| Uptown Families                                       | 855                         | 1.3%                       | \$71,600                               | \$252,800                                  |
| In-Town Families                                      | 1,230                       | 1.9%                       | \$36,700                               | \$142,800                                  |
| New American Strivers                                 | 635                         | 1.0%                       | \$34,800                               | \$178,600                                  |
| <i>Subtotal:</i>                                      | <u>3,575</u>                | <u>5.6%</u>                |  |  |
| <i>Metropolitan Suburbs</i>                           |                             |                            |  |  |
| Corporate Establishment                               | 0                           | 0.0%                       |  |  |
| Nouveau Money   | 0                           | 0.0%                       |  |  |
| Button-Down Families                                  | 385                         | 0.6%                       | \$126,100                              | \$471,000                                  |
| Fiber-Optic Families                                  | 270                         | 0.4%                       | \$101,000                              | \$301,800                                  |
| Late-Nest Suburbanites                                | 450                         | 0.7%                       | \$88,300                               | \$402,600                                  |
| Full-Nest Suburbanites                                | 445                         | 0.7%                       | \$81,800                               | \$367,100                                  |
| Kids 'r' Us   | 490                         | 0.8%                       | \$75,300                               | \$243,800                                  |
| <i>Subtotal:</i>                                      | <u>2,040</u>                | <u>3.2%</u>                |  |  |
| <i>Town &amp; Country/Exurbs</i>                      |                             |                            |  |  |
| Ex-Urban Elite  | 1,165                       | 1.8%                       | \$140,800                              | \$478,500                                  |
| New Town Families                                     | 615                         | 1.0%                       | \$107,500                              | \$311,800                                  |
| Full-Nest Exurbanites                                 | 285                         | 0.4%                       | \$112,600                              | \$385,000                                  |
| Rural Families  | 890                         | 1.4%                       | \$83,700                               | \$218,900                                  |
| Traditional Families                                  | 640                         | 1.0%                       | \$79,100                               | \$248,300                                  |
| Small-Town Families                                   | 3,625                       | 5.7%                       | \$80,700                               | \$289,800                                  |
| Four-by-Four Families                                 | 1,560                       | 2.5%                       | \$75,200                               | \$241,400                                  |
| Rustic Families                                       | 1,055                       | 1.7%                       | \$65,000                               | \$171,000                                  |
| Hometown Families                                     | 3,810                       | 6.0%                       | \$51,600                               | \$171,100                                  |
| <i>Subtotal:</i>                                      | <u>13,645</u>               | <u>21.4%</u>               |  |  |

## 2025 Household Classification by Market Groups

*Macon-Bibb County, Georgia*

|  | <i>Estimated<br/>Number</i> | <i>Estimated<br/>Share</i> | <i>Estimated<br/>Median<br/>Income</i> | <i>Estimated<br/>Median<br/>Home Value</i> |
|--|-----------------------------|----------------------------|--|--|
| <b>Younger<br/>Singles &amp; Couples</b> | <b>19,490</b>               | <b>30.6%</b>               |  |  |
| <i>Metropolitan Cities</i>               |                             |                            |  |  |
| New Power Couples                        | 0                           | 0.0%                       |  |  |
| New Bohemians                            | 0                           | 0.0%                       |  |  |
| Cosmopolitan Elite                       | 0                           | 0.0%                       |  |  |
| Downtown Couples                         | 0                           | 0.0%                       |  |  |
| Downtown Proud                           | 0                           | 0.0%                       |  |  |
| <i>Subtotal:</i>                         | <u>0</u>                    | <u>0.0%</u>                |  |  |
| <i>Small Cities/Satellite Cities</i>     |                             |                            |  |  |
| The VIPs                                 | 625                         | 1.0%                       | \$81,500                               | \$396,100                                  |
| Small-City Singles                       | 960                         | 1.5%                       | \$34,300                               | \$133,700                                  |
| Twentysomethings                         | 1,520                       | 2.4%                       | \$31,600                               | \$234,000                                  |
| Second-City Strivers                     | 1,595                       | 2.5%                       | \$30,300                               | \$189,400                                  |
| Multi-Ethnic Singles                     | 6,555                       | 10.3%                      | \$21,500                               | \$107,500                                  |
| <i>Subtotal:</i>                         | <u>11,255</u>               | <u>17.7%</u>               |  |  |
| <i>Metropolitan Suburbs</i>              |                             |                            |  |  |
| Fast-Track Professionals                 | 285                         | 0.4%                       | \$80,600                               | \$389,300                                  |
| Suburban Achievers                       | 1,325                       | 2.1%                       | \$49,300                               | \$165,800                                  |
| Suburban Strivers                        | 1,005                       | 1.6%                       | \$35,400                               | \$186,800                                  |
| <i>Subtotal:</i>                         | <u>2,615</u>                | <u>4.1%</u>                |  |  |
| <i>Town &amp; Country/Exurbs</i>         |                             |                            |  |  |
| Hometown Sweethearts                     | 1,990                       | 3.1%                       | \$54,100                               | \$159,100                                  |
| Blue-Collar Traditionalists              | 230                         | 0.4%                       | \$51,800                               | \$136,200                                  |
| Rural Couples                            | 1,005                       | 1.6%                       | \$31,000                               | \$103,600                                  |
| Rural Strivers                           | 2,395                       | 3.8%                       | \$26,400                               | \$106,200                                  |
| <i>Subtotal:</i>                         | <u>5,620</u>                | <u>8.8%</u>                |  |  |

**Annual Average Number Of Households With The Potential  
To Move Within Macon-Bibb County Each Year Over The Next Five Years**  
*Macon-Bibb County, Georgia*

| <u>Household Type /<br/>Geographic Designation</u>    | <u>Estimated<br/>Number</u> | <u>Potential</u> | <u>Share of<br/>Potential</u> |
|---|-----------------------------|------------------|-------------------------------|
| <b>Empty Nesters<br/>&amp; Retirees</b>               |                             |                  |                               |
|   | <b>24,870</b>               | <b>1,190</b>     | <b>21.2%</b>                  |
| <i>Metropolitan Cities</i>                            | 0                           | 0                | 0.0%                          |
| <i>Small Cities/Satellite Cities</i>                  | 9,360                       | 450              | 8.0%                          |
| <i>Metropolitan Suburbs</i>                           | 3,215                       | 130              | 2.3%                          |
| <i>Town &amp; Country/Exurbs</i>                      | 12,295                      | 610              | 10.9%                         |
| <b>Traditional &amp;<br/>Non-Traditional Families</b> |                             |                  |                               |
|   | <b>19,260</b>               | <b>1,740</b>     | <b>30.9%</b>                  |
| <i>Metropolitan Cities</i>                            | 0                           | 0                | 0.0%                          |
| <i>Small Cities/Satellite Cities</i>                  | 3,575                       | 310              | 5.5%                          |
| <i>Metropolitan Suburbs</i>                           | 2,040                       | 90               | 1.6%                          |
| <i>Town &amp; Country/Exurbs</i>                      | 13,645                      | 1,340            | 23.8%                         |
| <b>Younger<br/>Singles &amp; Couples</b>              |                             |                  |                               |
|   | <b>19,490</b>               | <b>2,690</b>     | <b>47.9%</b>                  |
| <i>Metropolitan Cities</i>                            | 0                           | 0                | 0.0%                          |
| <i>Small Cities/Satellite Cities</i>                  | 11,255                      | 1,770            | 31.5%                         |
| <i>Metropolitan Suburbs</i>                           | 2,615                       | 260              | 4.6%                          |
| <i>Town &amp; Country/Exurbs</i>                      | 5,620                       | 660              | 11.8%                         |
| <b>Total:</b>   | <b>63,620</b>               | <b>5,620</b>     | <b>100.0%</b>                 |

**Annual Average Number Of Households With The Potential  
To Move Within Macon-Bibb County Each Year Over The Next Five Years**

*Macon-Bibb County, Georgia*

|   | <i>Estimated<br/>Number</i> | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|---|-----------------------------|------------------|-------------------------------|
| <b>Empty Nesters<br/>&amp; Retirees</b> | <b>24,870</b>               | <b>1,190</b>     | <b>21.2%</b>                  |
| <i>Metropolitan Cities</i>              |                             |                  |                               |
| The Social Register                     | 0                           | 0                | 0.0%                          |
| Urban Establishment                     | 0                           | 0                | 0.0%                          |
| Multi-Ethnic Empty Nesters              | 0                           | 0                | 0.0%                          |
| Cosmopolitan Couples                    | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                        | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Small Cities/Satellite Cities</i>    |                             |                  |                               |
| Second City Establishment               | 420                         | 10               | 0.2%                          |
| Blue-Collar Retirees                    | 860                         | 50               | 0.9%                          |
| Middle-Class Move-Downs                 | 250                         | 10               | 0.2%                          |
| Hometown Seniors                        | 4,900                       | 75               | 1.3%                          |
| Second City Seniors                     | 2,930                       | 305              | 5.4%                          |
| <i>Subtotal:</i>                        | <u>9,360</u>                | <u>450</u>       | <u>8.0%</u>                   |
| <i>Metropolitan Suburbs</i>             |                             |                  |                               |
| The One Percenters                      | 45                          | 0                | 0.0%                          |
| Old Money                               | 60                          | 0                | 0.0%                          |
| Affluent Empty Nesters                  | 0                           | 0                | 0.0%                          |
| Suburban Establishment                  | 655                         | 15               | 0.3%                          |
| Mainstream Empty Nesters                | 710                         | 40               | 0.7%                          |
| Middle-American Retirees                | 1,745                       | 75               | 1.3%                          |
| <i>Subtotal:</i>                        | <u>3,215</u>                | <u>130</u>       | <u>2.3%</u>                   |
| <i>Town &amp; Country/Exurbs</i>        |                             |                  |                               |
| Small-Town Patriarchs                   | 1,395                       | 55               | 1.0%                          |
| Pillars of the Community                | 910                         | 45               | 0.8%                          |
| New Empty Nesters                       | 320                         | 5                | 0.1%                          |
| Traditional Couples                     | 1,050                       | 25               | 0.4%                          |
| RV Retirees                             | 650                         | 20               | 0.4%                          |
| Country Couples                         | 2,530                       | 125              | 2.2%                          |
| Hometown Retirees                       | 300                         | 10               | 0.2%                          |
| Heartland Retirees                      | 210                         | 5                | 0.1%                          |
| Village Elders                          | 1,205                       | 55               | 1.0%                          |
| Small-Town Seniors                      | 2,680                       | 205              | 3.6%                          |
| Back Country Seniors                    | 1,045                       | 60               | 1.1%                          |
| <i>Subtotal:</i>                        | <u>12,295</u>               | <u>610</u>       | <u>10.9%</u>                  |

SOURCE: Claritas, Inc.;  
Zimmerman/Volk Associates, Inc.

**Annual Average Number Of Households With The Potential  
To Move Within Macon-Bibb County Each Year Over The Next Five Years**  
*Macon-Bibb County, Georgia*

|   | <i>Estimated<br/>Number</i> | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|---|-----------------------------|------------------|-------------------------------|
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>19,260</b>               | <b>1,740</b>     | <b>30.9%</b>                  |
| <i>Metropolitan Cities</i>                            |                             |                  |                               |
| e-Type Families                                       | 0                           | 0                | 0.0%                          |
| Multi-Cultural Families                               | 0                           | 0                | 0.0%                          |
| Inner-City Families                                   | 0                           | 0                | 0.0%                          |
| Single-Parent Families                                | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                                      | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Small Cities/Satellite Cities</i>                  |                             |                  |                               |
| Unibox Transferees                                    | 465                         | 20               | 0.4%                          |
| Multi-Ethnic Families                                 | 390                         | 25               | 0.4%                          |
| Uptown Families                                       | 855                         | 70               | 1.3%                          |
| In-Town Families                                      | 1,230                       | 115              | 2.0%                          |
| New American Strivers                                 | 635                         | 80               | 1.4%                          |
| <i>Subtotal:</i>                                      | <u>3,575</u>                | <u>310</u>       | <u>5.5%</u>                   |
| <i>Metropolitan Suburbs</i>                           |                             |                  |                               |
| Corporate Establishment                               | 0                           | 0                | 0.0%                          |
| Nouveau Money   | 0                           | 0                | 0.0%                          |
| Button-Down Families                                  | 385                         | 10               | 0.2%                          |
| Fiber-Optic Families                                  | 270                         | 5                | 0.1%                          |
| Late-Nest Suburbanites                                | 450                         | 20               | 0.4%                          |
| Full-Nest Suburbanites                                | 445                         | 25               | 0.4%                          |
| Kids 'r' Us   | 490                         | 30               | 0.5%                          |
| <i>Subtotal:</i>                                      | <u>2,040</u>                | <u>90</u>        | <u>1.6%</u>                   |
| <i>Town &amp; Country/Exurbs</i>                      |                             |                  |                               |
| Ex-Urban Elite  | 1,165                       | 45               | 0.8%                          |
| New Town Families                                     | 615                         | 25               | 0.4%                          |
| Full-Nest Exurbanites                                 | 285                         | 15               | 0.3%                          |
| Rural Families  | 890                         | 35               | 0.6%                          |
| Traditional Families                                  | 640                         | 25               | 0.4%                          |
| Small-Town Families                                   | 3,625                       | 380              | 6.8%                          |
| Four-by-Four Families                                 | 1,560                       | 150              | 2.7%                          |
| Rustic Families                                       | 1,055                       | 85               | 1.5%                          |
| Hometown Families                                     | 3,810                       | 580              | 10.3%                         |
| <i>Subtotal:</i>                                      | <u>13,645</u>               | <u>1,340</u>     | <u>23.8%</u>                  |

**Annual Average Number Of Households With The Potential  
To Move Within Macon-Bibb County Each Year Over The Next Five Years**  
*Macon-Bibb County, Georgia*

|  | <i>Estimated<br/>Number</i> | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|--|-----------------------------|------------------|-------------------------------|
| <b>Younger<br/>Singles &amp; Couples</b> | <b>19,490</b>               | <b>2,690</b>     | <b>47.9%</b>                  |
| <i>Metropolitan Cities</i>               |                             |                  |                               |
| New Power Couples                        | 0                           | 0                | 0.0%                          |
| New Bohemians                            | 0                           | 0                | 0.0%                          |
| Cosmopolitan Elite                       | 0                           | 0                | 0.0%                          |
| Downtown Couples                         | 0                           | 0                | 0.0%                          |
| Downtown Proud                           | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                         | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Small Cities/Satellite Cities</i>     |                             |                  |                               |
| The VIPs                                 | 625                         | 50               | 0.9%                          |
| Small-City Singles                       | 960                         | 125              | 2.2%                          |
| Twentysomethings                         | 1,520                       | 300              | 5.3%                          |
| Second-City Strivers                     | 1,595                       | 235              | 4.2%                          |
| Multi-Ethnic Singles                     | 6,555                       | 1,060            | 18.9%                         |
| <i>Subtotal:</i>                         | <u>11,255</u>               | <u>1,770</u>     | <u>31.5%</u>                  |
| <i>Metropolitan Suburbs</i>              |                             |                  |                               |
| Fast-Track Professionals                 | 285                         | 40               | 0.7%                          |
| Suburban Achievers                       | 1,325                       | 55               | 1.0%                          |
| Suburban Strivers                        | 1,005                       | 165              | 2.9%                          |
| <i>Subtotal:</i>                         | <u>2,615</u>                | <u>260</u>       | <u>4.6%</u>                   |
| <i>Town &amp; Country/Exurbs</i>         |                             |                  |                               |
| Hometown Sweethearts                     | 1,990                       | 90               | 1.6%                          |
| Blue-Collar Traditionalists              | 230                         | 20               | 0.4%                          |
| Rural Couples                            | 1,005                       | 135              | 2.4%                          |
| Rural Strivers                           | 2,395                       | 415              | 7.4%                          |
| <i>Subtotal:</i>                         | <u>5,620</u>                | <u>660</u>       | <u>11.8%</u>                  |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**

Summary: Appendix Two, Tables 1 And 2

*Jones County, Georgia, Monroe County, Georgia*

| <u>Household Type /<br/>Geographic Designation</u>    | <u><i>Jones<br/>County</i></u> | <u><i>Monroe<br/>County</i></u> | <u>Total</u>  |
|---|--------------------------------|---------------------------------|---------------|
| <b>Empty Nesters<br/>&amp; Retirees</b>               | <b>65</b>                      | <b>55</b>                       | <b>120</b>    |
| <i>Metropolitan Cities</i>                            | 0                              | 0                               | 0             |
| <i>Small Cities/Satellite Cities</i>                  | 0                              | 0                               | 0             |
| <i>Metropolitan Suburbs</i>                           | 0                              | 0                               | 0             |
| <i>Town &amp; Country/Exurbs</i>                      | 65                             | 55                              | 120           |
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>105</b>                     | <b>70</b>                       | <b>175</b>    |
| <i>Metropolitan Cities</i>                            | 0                              | 0                               | 0             |
| <i>Small Cities/Satellite Cities</i>                  | 0                              | 0                               | 0             |
| <i>Metropolitan Suburbs</i>                           | 0                              | 0                               | 0             |
| <i>Town &amp; Country/Exurbs</i>                      | 105                            | 70                              | 175           |
| <b>Younger<br/>Singles &amp; Couples</b>              | <b>90</b>                      | <b>70</b>                       | <b>160</b>    |
| <i>Metropolitan Cities</i>                            | 0                              | 0                               | 0             |
| <i>Small Cities/Satellite Cities</i>                  | 0                              | 0                               | 0             |
| <i>Metropolitan Suburbs</i>                           | 0                              | 0                               | 0             |
| <i>Town &amp; Country/Exurbs</i>                      | 90                             | 70                              | 160           |
| <b>Total:</b>   | <b>260</b>                     | <b>195</b>                      | <b>455</b>    |
| <b>Percent:</b>                                       | <b>57.1%</b>                   | <b>42.9%</b>                    | <b>100.0%</b> |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**

Summary: Appendix Two, Tables 1 And 2

*Jones County, Georgia, Monroe County, Georgia*

|   | <i>Jones<br/>County</i> | <i>Monroe<br/>County</i> | Total      |
|---|-------------------------|--------------------------|------------|
| <b>Empty Nesters<br/>&amp; Retirees</b> | <b>65</b>               | <b>55</b>                | <b>120</b> |
| <i>Metropolitan Cities</i>              |                         |                          |            |
| The Social Register                     | 0                       | 0                        | 0          |
| Urban Establishment                     | 0                       | 0                        | 0          |
| Multi-Ethnic Empty Nesters              | 0                       | 0                        | 0          |
| Cosmopolitan Couples                    | 0                       | 0                        | 0          |
| <i>Subtotal:</i>                        | <u>0</u>                | <u>0</u>                 | <u>0</u>   |
| <i>Small Cities/Satellite Cities</i>    |                         |                          |            |
| Second City Establishment               | 0                       | 0                        | 0          |
| Blue-Collar Retirees                    | 0                       | 0                        | 0          |
| Middle-Class Move-Downs                 | 0                       | 0                        | 0          |
| Hometown Seniors                        | 0                       | 0                        | 0          |
| Second City Seniors                     | 0                       | 0                        | 0          |
| <i>Subtotal:</i>                        | <u>0</u>                | <u>0</u>                 | <u>0</u>   |
| <i>Metropolitan Suburbs</i>             |                         |                          |            |
| The One Percenters                      | 0                       | 0                        | 0          |
| Old Money                               | 0                       | 0                        | 0          |
| Affluent Empty Nesters                  | 0                       | 0                        | 0          |
| Suburban Establishment                  | 0                       | 0                        | 0          |
| Mainstream Empty Nesters                | 0                       | 0                        | 0          |
| Middle-American Retirees                | 0                       | 0                        | 0          |
| <i>Subtotal:</i>                        | <u>0</u>                | <u>0</u>                 | <u>0</u>   |
| <i>Town &amp; Country/Exurbs</i>        |                         |                          |            |
| Small-Town Patriarchs                   | 0                       | 0                        | 0          |
| Pillars of the Community                | 0                       | 0                        | 0          |
| New Empty Nesters                       | 5                       | 10                       | 15         |
| Traditional Couples                     | 0                       | 0                        | 0          |
| RV Retirees                             | 10                      | 5                        | 15         |
| Country Couples                         | 5                       | 0                        | 5          |
| Hometown Retirees                       | 5                       | 5                        | 10         |
| Heartland Retirees                      | 0                       | 5                        | 5          |
| Village Elders                          | 5                       | 0                        | 5          |
| Small-Town Seniors                      | 10                      | 0                        | 10         |
| Back Country Seniors                    | 25                      | 30                       | 55         |
| <i>Subtotal:</i>                        | <u>65</u>               | <u>55</u>                | <u>120</u> |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**

Summary: Appendix Two, Tables 1 And 2

*Jones County, Georgia, Monroe County, Georgia*

|   | <i>Jones<br/>County</i> | <i>Monroe<br/>County</i> | Total      |
|---|-------------------------|--------------------------|------------|
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>105</b>              | <b>70</b>                | <b>175</b> |
| <i>Metropolitan Cities</i>                            |                         |                          |            |
| e-Type Families                                       | 0                       | 0                        | 0          |
| Multi-Cultural Families                               | 0                       | 0                        | 0          |
| Inner-City Families                                   | 0                       | 0                        | 0          |
| Single-Parent Families                                | 0                       | 0                        | 0          |
| <i>Subtotal:</i>                                      | <u>0</u>                | <u>0</u>                 | <u>0</u>   |
| <i>Small Cities/Satellite Cities</i>                  |                         |                          |            |
| Unibox Transferees                                    | 0                       | 0                        | 0          |
| Multi-Ethnic Families                                 | 0                       | 0                        | 0          |
| Uptown Families                                       | 0                       | 0                        | 0          |
| In-Town Families                                      | 0                       | 0                        | 0          |
| New American Strivers                                 | 0                       | 0                        | 0          |
| <i>Subtotal:</i>                                      | <u>0</u>                | <u>0</u>                 | <u>0</u>   |
| <i>Metropolitan Suburbs</i>                           |                         |                          |            |
| Corporate Establishment                               | 0                       | 0                        | 0          |
| Nouveau Money   | 0                       | 0                        | 0          |
| Button-Down Families                                  | 0                       | 0                        | 0          |
| Fiber-Optic Families                                  | 0                       | 0                        | 0          |
| Late-Nest Suburbanites                                | 0                       | 0                        | 0          |
| Full-Nest Suburbanites                                | 0                       | 0                        | 0          |
| Kids 'r' Us   | 0                       | 0                        | 0          |
| <i>Subtotal:</i>                                      | <u>0</u>                | <u>0</u>                 | <u>0</u>   |
| <i>Town &amp; Country/Exurbs</i>                      |                         |                          |            |
| Ex-Urban Elite  | 0                       | 0                        | 0          |
| New Town Families                                     | 0                       | 0                        | 0          |
| Full-Nest Exurbanites                                 | 15                      | 20                       | 35         |
| Rural Families  | 20                      | 10                       | 30         |
| Traditional Families                                  | 0                       | 0                        | 0          |
| Small-Town Families                                   | 5                       | 0                        | 5          |
| Four-by-Four Families                                 | 5                       | 0                        | 5          |
| Rustic Families                                       | 60                      | 40                       | 100        |
| Hometown Families                                     | 0                       | 0                        | 0          |
| <i>Subtotal:</i>                                      | <u>105</u>              | <u>70</u>                | <u>175</u> |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**

Summary: Appendix Two, Tables 1 And 2

*Jones County, Georgia, Monroe County, Georgia*

|  | <i>Jones<br/>County</i> | <i>Monroe<br/>County</i> | Total      |
|--|-------------------------|--------------------------|------------|
| <b>Younger<br/>Singles &amp; Couples</b> | <b>90</b>               | <b>70</b>                | <b>160</b> |
| <i>Metropolitan Cities</i>               |                         |                          |            |
| New Power Couples                        | 0                       | 0                        | 0          |
| New Bohemians                            | 0                       | 0                        | 0          |
| Cosmopolitan Elite                       | 0                       | 0                        | 0          |
| Downtown Couples                         | 0                       | 0                        | 0          |
| Downtown Proud                           | 0                       | 0                        | 0          |
| <i>Subtotal:</i>                         | <u>0</u>                | <u>0</u>                 | <u>0</u>   |
| <i>Small Cities/Satellite Cities</i>     |                         |                          |            |
| The VIPs                                 | 0                       | 0                        | 0          |
| Small-City Singles                       | 0                       | 0                        | 0          |
| Twentysomethings                         | 0                       | 0                        | 0          |
| Second-City Strivers                     | 0                       | 0                        | 0          |
| Multi-Ethnic Singles                     | 0                       | 0                        | 0          |
| <i>Subtotal:</i>                         | <u>0</u>                | <u>0</u>                 | <u>0</u>   |
| <i>Metropolitan Suburbs</i>              |                         |                          |            |
| Fast-Track Professionals                 | 0                       | 0                        | 0          |
| Suburban Achievers                       | 0                       | 0                        | 0          |
| Suburban Strivers                        | 0                       | 0                        | 0          |
| <i>Subtotal:</i>                         | <u>0</u>                | <u>0</u>                 | <u>0</u>   |
| <i>Town &amp; Country/Exurbs</i>         |                         |                          |            |
| Hometown Sweethearts                     | 5                       | 0                        | 5          |
| Blue-Collar Traditionalists              | 15                      | 15                       | 30         |
| Rural Couples                            | 55                      | 55                       | 110        |
| Rural Strivers                           | 15                      | 0                        | 15         |
| <i>Subtotal:</i>                         | <u>90</u>               | <u>70</u>                | <u>160</u> |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**

*Houston County, Georgia*

| <u>Household Type/<br/>Geographic Designation</u>     | <u>Estimated<br/>Number</u> | <u>Potential</u> | <u>Share of<br/>Potential</u> |
|---|-----------------------------|------------------|-------------------------------|
| <b>Empty Nesters<br/>&amp; Retirees</b>               | <b>21,235</b>               | <b>105</b>       | <b>19.5%</b>                  |
| <i>Metropolitan Cities</i>                            | 0                           | 0                | 0.0%                          |
| <i>Small Cities/Satellite Cities</i>                  | 5,495                       | 25               | 4.6%                          |
| <i>Metropolitan Suburbs</i>                           | 6,310                       | 30               | 5.6%                          |
| <i>Town &amp; Country/Exurbs</i>                      | 9,430                       | 50               | 9.3%                          |
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>30,430</b>               | <b>240</b>       | <b>44.4%</b>                  |
| <i>Metropolitan Cities</i>                            | 0                           | 0                | 0.0%                          |
| <i>Small Cities/Satellite Cities</i>                  | 7,565                       | 85               | 15.7%                         |
| <i>Metropolitan Suburbs</i>                           | 7,400                       | 30               | 5.6%                          |
| <i>Town &amp; Country/Exurbs</i>                      | 15,465                      | 125              | 23.1%                         |
| <b>Younger<br/>Singles &amp; Couples</b>              | <b>14,160</b>               | <b>195</b>       | <b>36.1%</b>                  |
| <i>Metropolitan Cities</i>                            | 0                           | 0                | 0.0%                          |
| <i>Small Cities/Satellite Cities</i>                  | 6,540                       | 110              | 20.4%                         |
| <i>Metropolitan Suburbs</i>                           | 4,005                       | 40               | 7.4%                          |
| <i>Town &amp; Country/Exurbs</i>                      | 3,615                       | 45               | 8.3%                          |
| <b>Total:</b>   | <b>65,825</b>               | <b>540</b>       | <b>100.0%</b>                 |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**

*Houston County, Georgia*

|   | <i>Estimated<br/>Number</i> | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|---|-----------------------------|------------------|-------------------------------|
| <b>Empty Nesters<br/>&amp; Retirees</b> | <b>21,235</b>               | <b>105</b>       | <b>19.5%</b>                  |
| <i>Metropolitan Cities</i>              |                             |                  |                               |
| The Social Register                     | 0                           | 0                | 0.0%                          |
| Urban Establishment                     | 0                           | 0                | 0.0%                          |
| Multi-Ethnic Empty Nesters              | 0                           | 0                | 0.0%                          |
| Cosmopolitan Couples                    | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                        | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Small Cities/Satellite Cities</i>    |                             |                  |                               |
| Second City Establishment               | 710                         | 0                | 0.0%                          |
| Blue-Collar Retirees                    | 1,280                       | 10               | 1.9%                          |
| Middle-Class Move-Downs                 | 155                         | 0                | 0.0%                          |
| Hometown Seniors                        | 2,440                       | 5                | 0.9%                          |
| Second City Seniors                     | 910                         | 10               | 1.9%                          |
| <i>Subtotal:</i>                        | <u>5,495</u>                | <u>25</u>        | <u>4.6%</u>                   |
| <i>Metropolitan Suburbs</i>             |                             |                  |                               |
| The One Percenters                      | 0                           | 0                | 0.0%                          |
| Old Money                               | 0                           | 0                | 0.0%                          |
| Affluent Empty Nesters                  | 105                         | 0                | 0.0%                          |
| Suburban Establishment                  | 1,245                       | 5                | 0.9%                          |
| Mainstream Empty Nesters                | 1,710                       | 10               | 1.9%                          |
| Middle-American Retirees                | 3,250                       | 15               | 2.8%                          |
| <i>Subtotal:</i>                        | <u>6,310</u>                | <u>30</u>        | <u>5.6%</u>                   |
| <i>Town &amp; Country/Exurbs</i>        |                             |                  |                               |
| Small-Town Patriarchs                   | 1,545                       | 5                | 0.9%                          |
| Pillars of the Community                | 1,400                       | 10               | 1.9%                          |
| New Empty Nesters                       | 260                         | 0                | 0.0%                          |
| Traditional Couples                     | 670                         | 0                | 0.0%                          |
| RV Retirees                             | 345                         | 0                | 0.0%                          |
| Country Couples                         | 2,005                       | 10               | 1.9%                          |
| Hometown Retirees                       | 270                         | 0                | 0.0%                          |
| Heartland Retirees                      | 220                         | 0                | 0.0%                          |
| Village Elders                          | 525                         | 5                | 0.9%                          |
| Small-Town Seniors                      | 1,605                       | 15               | 2.8%                          |
| Back Country Seniors                    | 585                         | 5                | 0.9%                          |
| <i>Subtotal:</i>                        | <u>9,430</u>                | <u>50</u>        | <u>9.3%</u>                   |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**

*Houston County, Georgia*

|   | <i>Estimated<br/>Number</i> | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|---|-----------------------------|------------------|-------------------------------|
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>30,430</b>               | <b>240</b>       | <b>44.4%</b>                  |
| <i>Metropolitan Cities</i>                            |                             |                  |                               |
| e-Type Families                                       | 0                           | 0                | 0.0%                          |
| Multi-Cultural Families                               | 0                           | 0                | 0.0%                          |
| Inner-City Families                                   | 0                           | 0                | 0.0%                          |
| Single-Parent Families                                | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                                      | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Small Cities/Satellite Cities</i>                  |                             |                  |                               |
| Unibox Transferees                                    | 175                         | 0                | 0.0%                          |
| Multi-Ethnic Families                                 | 1,915                       | 15               | 2.8%                          |
| Uptown Families                                       | 1,575                       | 15               | 2.8%                          |
| In-Town Families                                      | 1,350                       | 15               | 2.8%                          |
| New American Strivers                                 | 2,550                       | 40               | 7.4%                          |
| <i>Subtotal:</i>                                      | <u>7,565</u>                | <u>85</u>        | <u>15.7%</u>                  |
| <i>Metropolitan Suburbs</i>                           |                             |                  |                               |
| Corporate Establishment                               | 355                         | 0                | 0.0%                          |
| Nouveau Money   | 460                         | 0                | 0.0%                          |
| Button-Down Families                                  | 875                         | 0                | 0.0%                          |
| Fiber-Optic Families                                  | 510                         | 0                | 0.0%                          |
| Late-Nest Suburbanites                                | 2,090                       | 10               | 1.9%                          |
| Full-Nest Suburbanites                                | 1,375                       | 10               | 1.9%                          |
| Kids 'r' Us   | 1,735                       | 10               | 1.9%                          |
| <i>Subtotal:</i>                                      | <u>7,400</u>                | <u>30</u>        | <u>5.6%</u>                   |
| <i>Town &amp; Country/Exurbs</i>                      |                             |                  |                               |
| Ex-Urban Elite  | 1,560                       | 5                | 0.9%                          |
| New Town Families                                     | 1,440                       | 5                | 0.9%                          |
| Full-Nest Exurbanites                                 | 1,375                       | 10               | 1.9%                          |
| Rural Families  | 960                         | 5                | 0.9%                          |
| Traditional Families                                  | 3,340                       | 15               | 2.8%                          |
| Small-Town Families                                   | 2,620                       | 30               | 5.6%                          |
| Four-by-Four Families                                 | 1,620                       | 20               | 3.7%                          |
| Rustic Families                                       | 1,300                       | 15               | 2.8%                          |
| Hometown Families                                     | 1,250                       | 20               | 3.7%                          |
| <i>Subtotal:</i>                                      | <u>15,465</u>               | <u>125</u>       | <u>23.1%</u>                  |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**

*Houston County, Georgia*

|  | <i>Estimated<br/>Number</i> | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|--|-----------------------------|------------------|-------------------------------|
| <b>Younger<br/>Singles &amp; Couples</b> | <b>14,160</b>               | <b>195</b>       | <b>36.1%</b>                  |
| <i>Metropolitan Cities</i>               |                             |                  |                               |
| New Power Couples                        | 0                           | 0                | 0.0%                          |
| New Bohemians                            | 0                           | 0                | 0.0%                          |
| Cosmopolitan Elite                       | 0                           | 0                | 0.0%                          |
| Downtown Couples                         | 0                           | 0                | 0.0%                          |
| Downtown Proud                           | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                         | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Small Cities/Satellite Cities</i>     |                             |                  |                               |
| The VIPs                                 | 940                         | 10               | 1.9%                          |
| Small-City Singles                       | 2,210                       | 35               | 6.5%                          |
| Twentysomethings                         | 820                         | 20               | 3.7%                          |
| Second-City Strivers                     | 1,200                       | 20               | 3.7%                          |
| Multi-Ethnic Singles                     | 1,370                       | 25               | 4.6%                          |
| <i>Subtotal:</i>                         | <u>6,540</u>                | <u>110</u>       | <u>20.4%</u>                  |
| <i>Metropolitan Suburbs</i>              |                             |                  |                               |
| Fast-Track Professionals                 | 835                         | 15               | 2.8%                          |
| Suburban Achievers                       | 2,390                       | 10               | 1.9%                          |
| Suburban Strivers                        | 780                         | 15               | 2.8%                          |
| <i>Subtotal:</i>                         | <u>4,005</u>                | <u>40</u>        | <u>7.4%</u>                   |
| <i>Town &amp; Country/Exurbs</i>         |                             |                  |                               |
| Hometown Sweethearts                     | 1,840                       | 10               | 1.9%                          |
| Blue-Collar Traditionalists              | 240                         | 5                | 0.9%                          |
| Rural Couples                            | 650                         | 10               | 1.9%                          |
| Rural Strivers                           | 885                         | 20               | 3.7%                          |
| <i>Subtotal:</i>                         | <u>3,615</u>                | <u>45</u>        | <u>8.3%</u>                   |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**  
*Balance of the United States*

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| Household Type/<br>Geographic Designation             | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|---|------------------|-------------------------------|
| <b>Empty Nesters<br/>&amp; Retirees</b>               | <b>720</b>       | <b>24.6%</b>                  |
| <i>Metropolitan Cities</i>                            | 115              | 3.9%                          |
| <i>Small Cities/Satellite Cities</i>                  | 135              | 4.6%                          |
| <i>Metropolitan Suburbs</i>                           | 145              | 5.0%                          |
| <i>Town &amp; Country/Exurbs</i>                      | 325              | 11.1%                         |
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>975</b>       | <b>33.3%</b>                  |
| <i>Metropolitan Cities</i>                            | 100              | 3.4%                          |
| <i>Small Cities/Satellite Cities</i>                  | 220              | 7.5%                          |
| <i>Metropolitan Suburbs</i>                           | 170              | 5.8%                          |
| <i>Town &amp; Country/Exurbs</i>                      | 485              | 16.6%                         |
| <b>Younger<br/>Singles &amp; Couples</b>              | <b>1,230</b>     | <b>42.1%</b>                  |
| <i>Metropolitan Cities</i>                            | 320              | 10.9%                         |
| <i>Small Cities/Satellite Cities</i>                  | 395              | 13.5%                         |
| <i>Metropolitan Suburbs</i>                           | 210              | 7.2%                          |
| <i>Town &amp; Country/Exurbs</i>                      | 305              | 10.4%                         |
| <b>Total:</b>   | <b>2,925</b>     | <b>100.0%</b>                 |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**  
*Balance of the United States*

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|   | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|---|------------------|-------------------------------|
| <b>Empty Nesters<br/>&amp; Retirees</b> | <b>720</b>       | <b>24.6%</b>                  |
| <i>Metropolitan Cities</i>              |                  |                               |
| The Social Register                     | 10               | 0.3%                          |
| Urban Establishment                     | 40               | 1.4%                          |
| Multi-Ethnic Empty Nesters              | 20               | 0.7%                          |
| Cosmopolitan Couples                    | 45               | 1.5%                          |
| <i>Subtotal:</i>                        | 115              | 3.9%                          |
| <i>Small Cities/Satellite Cities</i>    |                  |                               |
| Second City Establishment               | 20               | 0.7%                          |
| Blue-Collar Retirees                    | 45               | 1.5%                          |
| Middle-Class Move-Downs                 | 15               | 0.5%                          |
| Hometown Seniors                        | 10               | 0.3%                          |
| Second City Seniors                     | 45               | 1.5%                          |
| <i>Subtotal:</i>                        | 135              | 4.6%                          |
| <i>Metropolitan Suburbs</i>             |                  |                               |
| The One Percenters                      | 10               | 0.3%                          |
| Old Money                               | 10               | 0.3%                          |
| Affluent Empty Nesters                  | 15               | 0.5%                          |
| Suburban Establishment                  | 30               | 1.0%                          |
| Mainstream Empty Nesters                | 35               | 1.2%                          |
| Middle-American Retirees                | 45               | 1.5%                          |
| <i>Subtotal:</i>                        | 145              | 5.0%                          |
| <i>Town &amp; Country/Exurbs</i>        |                  |                               |
| Small-Town Patriarchs                   | 30               | 1.0%                          |
| Pillars of the Community                | 25               | 0.9%                          |
| New Empty Nesters                       | 15               | 0.5%                          |
| Traditional Couples                     | 15               | 0.5%                          |
| RV Retirees                             | 25               | 0.9%                          |
| Country Couples                         | 30               | 1.0%                          |
| Hometown Retirees                       | 20               | 0.7%                          |
| Heartland Retirees                      | 15               | 0.5%                          |
| Village Elders                          | 20               | 0.7%                          |
| Small-Town Seniors                      | 65               | 2.2%                          |
| Back Country Seniors                    | 65               | 2.2%                          |
| <i>Subtotal:</i>                        | 325              | 11.1%                         |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**  
*Balance of the United States*

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|   | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|---|------------------|-------------------------------|
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>975</b>       | <b>33.3%</b>                  |
| <i>Metropolitan Cities</i>                            |                  |                               |
| e-Type Families                                       | 10               | 0.3%                          |
| Multi-Cultural Families                               | 15               | 0.5%                          |
| Inner-City Families                                   | 50               | 1.7%                          |
| Single-Parent Families                                | 25               | 0.9%                          |
| <i>Subtotal:</i>                                      | 100              | 3.4%                          |
| <i>Small Cities/Satellite Cities</i>                  |                  |                               |
| Unibox Transferees                                    | 20               | 0.7%                          |
| Multi-Ethnic Families                                 | 25               | 0.9%                          |
| Uptown Families                                       | 50               | 1.7%                          |
| In-Town Families                                      | 45               | 1.5%                          |
| New American Strivers                                 | 80               | 2.7%                          |
| <i>Subtotal:</i>                                      | 220              | 7.5%                          |
| <i>Metropolitan Suburbs</i>                           |                  |                               |
| Corporate Establishment                               | 15               | 0.5%                          |
| Nouveau Money   | 20               | 0.7%                          |
| Button-Down Families                                  | 25               | 0.9%                          |
| Fiber-Optic Families                                  | 10               | 0.3%                          |
| Late-Nest Suburbanites                                | 30               | 1.0%                          |
| Full-Nest Suburbanites                                | 30               | 1.0%                          |
| Kids 'r' Us   | 40               | 1.4%                          |
| <i>Subtotal:</i>                                      | 170              | 5.8%                          |
| <i>Town &amp; Country/Exurbs</i>                      |                  |                               |
| Ex-Urban Elite  | 40               | 1.4%                          |
| New Town Families                                     | 20               | 0.7%                          |
| Full-Nest Exurbanites                                 | 45               | 1.5%                          |
| Rural Families  | 45               | 1.5%                          |
| Traditional Families                                  | 20               | 0.7%                          |
| Small-Town Families                                   | 75               | 2.6%                          |
| Four-by-Four Families                                 | 50               | 1.7%                          |
| Rustic Families                                       | 120              | 4.1%                          |
| Hometown Families                                     | 70               | 2.4%                          |
| <i>Subtotal:</i>                                      | 485              | 16.6%                         |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**  
*Balance of the United States*

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|  | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|--|------------------|-------------------------------|
| <b>Younger<br/>Singles &amp; Couples</b> | <b>1,230</b>     | <b>42.1%</b>                  |
| <i>Metropolitan Cities</i>               |                  |                               |
| New Power Couples                        | 15               | 0.5%                          |
| New Bohemians                            | 115              | 3.9%                          |
| Cosmopolitan Elite                       | 10               | 0.3%                          |
| Downtown Couples                         | 75               | 2.6%                          |
| Downtown Proud                           | 105              | 3.6%                          |
| <i>Subtotal:</i>                         | <u>320</u>       | <u>10.9%</u>                  |
| <i>Small Cities/Satellite Cities</i>     |                  |                               |
| The VIPs                                 | 55               | 1.9%                          |
| Small-City Singles                       | 75               | 2.6%                          |
| Twentysomethings                         | 130              | 4.4%                          |
| Second-City Strivers                     | 65               | 2.2%                          |
| Multi-Ethnic Singles                     | 70               | 2.4%                          |
| <i>Subtotal:</i>                         | <u>395</u>       | <u>13.5%</u>                  |
| <i>Metropolitan Suburbs</i>              |                  |                               |
| Fast-Track Professionals                 | 60               | 2.1%                          |
| Suburban Achievers                       | 25               | 0.9%                          |
| Suburban Strivers                        | 125              | 4.3%                          |
| <i>Subtotal:</i>                         | <u>210</u>       | <u>7.2%</u>                   |
| <i>Town &amp; Country/Exurbs</i>         |                  |                               |
| Hometown Sweethearts                     | 40               | 1.4%                          |
| Blue-Collar Traditionalists              | 60               | 2.1%                          |
| Rural Couples                            | 125              | 4.3%                          |
| Rural Strivers                           | 80               | 2.7%                          |
| <i>Subtotal:</i>                         | <u>305</u>       | <u>10.4%</u>                  |

**Annual Average Number Of Households With The Potential  
To Move Within/To Macon-Bibb County Each Year Over The Next Five Years**

Summary: Appendix One, Tables 3 Through 6

*Macon-Bibb County, Regional Draw Area,*

*Houston County, and Balance of the United States*

| <u>Household Type/<br/>Geographic Designation</u>     | <u>Macon-Bibb<br/>County</u> | <u>Regional<br/>Draw Area</u> | <u>Houston<br/>County</u> | <u>Balance<br/>of U.S.</u> | <u>Total</u>  |
|---|------------------------------|-------------------------------|---------------------------|----------------------------|---------------|
| <b>Empty Nesters<br/>&amp; Retirees</b>               | <b>1,190</b>                 | <b>120</b>                    | <b>105</b>                | <b>720</b>                 | <b>2,135</b>  |
| <i>Metropolitan Cities</i>                            | 0                            | 0                             | 0                         | 115                        | 115           |
| <i>Small Cities/Satellite Cities</i>                  | 450                          | 0                             | 25                        | 135                        | 610           |
| <i>Metropolitan Suburbs</i>                           | 130                          | 0                             | 30                        | 145                        | 305           |
| <i>Town &amp; Country/Exurbs</i>                      | 610                          | 120                           | 50                        | 325                        | 1,105         |
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>1,740</b>                 | <b>175</b>                    | <b>240</b>                | <b>975</b>                 | <b>3,130</b>  |
| <i>Metropolitan Cities</i>                            | 0                            | 0                             | 0                         | 100                        | 100           |
| <i>Small Cities/Satellite Cities</i>                  | 310                          | 0                             | 85                        | 220                        | 615           |
| <i>Metropolitan Suburbs</i>                           | 90                           | 0                             | 30                        | 170                        | 290           |
| <i>Town &amp; Country/Exurbs</i>                      | 1,340                        | 175                           | 125                       | 485                        | 2,125         |
| <b>Younger<br/>Singles &amp; Couples</b>              | <b>2,690</b>                 | <b>160</b>                    | <b>195</b>                | <b>1,230</b>               | <b>4,275</b>  |
| <i>Metropolitan Cities</i>                            | 0                            | 0                             | 0                         | 320                        | 320           |
| <i>Small Cities/Satellite Cities</i>                  | 1,770                        | 0                             | 110                       | 395                        | 2,275         |
| <i>Metropolitan Suburbs</i>                           | 260                          | 0                             | 40                        | 210                        | 510           |
| <i>Town &amp; Country/Exurbs</i>                      | 660                          | 160                           | 45                        | 305                        | 1,170         |
| <b>Total:</b>   | <b>5,620</b>                 | <b>455</b>                    | <b>540</b>                | <b>2,925</b>               | <b>9,540</b>  |
| <b>Percent:</b>                                       | <b>58.9%</b>                 | <b>4.8%</b>                   | <b>5.7%</b>               | <b>30.6%</b>               | <b>100.0%</b> |

**Annual Average Number Of Households With The Potential  
To Move Within/To Macon-Bibb County Each Year Over The Next Five Years**

Summary: Appendix One, Tables 3 Through 6

*Macon-Bibb County, Regional Draw Area,*

*Houston County, and Balance of the United States*

|   | <u>Macon-Bibb<br/>County</u> | <u>Regional<br/>Draw Area</u> | <u>Houston<br/>County</u> | <u>Balance<br/>of U.S.</u> | <u>Total</u> |
|---|------------------------------|-------------------------------|---------------------------|----------------------------|--------------|
| <b>Empty Nesters<br/>&amp; Retirees</b> | <b>1,190</b>                 | <b>120</b>                    | <b>105</b>                | <b>720</b>                 | <b>2,135</b> |
| <i>Metropolitan Cities</i>              |                              |                               |                           |                            |              |
| The Social Register                     | 0                            | 0                             | 0                         | 10                         | 10           |
| Urban Establishment                     | 0                            | 0                             | 0                         | 40                         | 40           |
| Multi-Ethnic Empty Nesters              | 0                            | 0                             | 0                         | 20                         | 20           |
| Cosmopolitan Couples                    | 0                            | 0                             | 0                         | 45                         | 45           |
| <i>Subtotal:</i>                        | <u>0</u>                     | <u>0</u>                      | <u>0</u>                  | <u>115</u>                 | <u>115</u>   |
| <i>Small Cities/Satellite Cities</i>    |                              |                               |                           |                            |              |
| Second City Establishment               | 10                           | 0                             | 0                         | 20                         | 30           |
| Blue-Collar Retirees                    | 50                           | 0                             | 10                        | 45                         | 105          |
| Middle-Class Move-Downs                 | 10                           | 0                             | 0                         | 15                         | 25           |
| Hometown Seniors                        | 75                           | 0                             | 5                         | 10                         | 90           |
| Second City Seniors                     | 305                          | 0                             | 10                        | 45                         | 360          |
| <i>Subtotal:</i>                        | <u>450</u>                   | <u>0</u>                      | <u>25</u>                 | <u>135</u>                 | <u>610</u>   |
| <i>Metropolitan Suburbs</i>             |                              |                               |                           |                            |              |
| The One Percenters                      | 0                            | 0                             | 0                         | 10                         | 10           |
| Old Money                               | 0                            | 0                             | 0                         | 10                         | 10           |
| Affluent Empty Nesters                  | 0                            | 0                             | 0                         | 15                         | 15           |
| Suburban Establishment                  | 15                           | 0                             | 5                         | 30                         | 50           |
| Mainstream Empty Nesters                | 40                           | 0                             | 10                        | 35                         | 85           |
| Middle-American Retirees                | 75                           | 0                             | 15                        | 45                         | 135          |
| <i>Subtotal:</i>                        | <u>130</u>                   | <u>0</u>                      | <u>30</u>                 | <u>145</u>                 | <u>305</u>   |
| <i>Town &amp; Country/Exurbs</i>        |                              |                               |                           |                            |              |
| Small-Town Patriarchs                   | 55                           | 0                             | 5                         | 30                         | 90           |
| Pillars of the Community                | 45                           | 0                             | 10                        | 25                         | 80           |
| New Empty Nesters                       | 5                            | 15                            | 0                         | 15                         | 35           |
| Traditional Couples                     | 25                           | 0                             | 0                         | 15                         | 40           |
| RV Retirees                             | 20                           | 15                            | 0                         | 25                         | 60           |
| Country Couples                         | 125                          | 5                             | 10                        | 30                         | 170          |
| Hometown Retirees                       | 10                           | 10                            | 0                         | 20                         | 40           |
| Heartland Retirees                      | 5                            | 5                             | 0                         | 15                         | 25           |
| Village Elders                          | 55                           | 5                             | 5                         | 20                         | 85           |
| Small-Town Seniors                      | 205                          | 10                            | 15                        | 65                         | 295          |
| Back Country Seniors                    | 60                           | 55                            | 5                         | 65                         | 185          |
| <i>Subtotal:</i>                        | <u>610</u>                   | <u>120</u>                    | <u>50</u>                 | <u>325</u>                 | <u>1,105</u> |

SOURCE: Claritas, Inc.;  
Zimmerman/Volk Associates, Inc.

## Annual Average Number Of Households With The Potential To Move Within/To Macon-Bibb County Each Year Over The Next Five Years

Summary: Appendix One, Tables 3 Through 6

*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

|   | <u>Macon-Bibb<br/>County</u> | <u>Regional<br/>Draw Area</u> | <u>Houston<br/>County</u> | <u>Balance<br/>of U.S.</u> | <u>Total</u> |
|---|------------------------------|-------------------------------|---------------------------|----------------------------|--------------|
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>1,740</b>                 | <b>175</b>                    | <b>240</b>                | <b>975</b>                 | <b>3,130</b> |
| <i>Metropolitan Cities</i>                            |                              |                               |                           |                            |              |
| e-Type Families                                       | 0                            | 0                             | 0                         | 10                         | 10           |
| Multi-Cultural Families                               | 0                            | 0                             | 0                         | 15                         | 15           |
| Inner-City Families                                   | 0                            | 0                             | 0                         | 50                         | 50           |
| Single-Parent Families                                | 0                            | 0                             | 0                         | 25                         | 25           |
| <i>Subtotal:</i>                                      | <u>0</u>                     | <u>0</u>                      | <u>0</u>                  | <u>100</u>                 | <u>100</u>   |
| <i>Small Cities/Satellite Cities</i>                  |                              |                               |                           |                            |              |
| Unibox Transferees                                    | 20                           | 0                             | 0                         | 20                         | 40           |
| Multi-Ethnic Families                                 | 25                           | 0                             | 15                        | 25                         | 65           |
| Uptown Families                                       | 70                           | 0                             | 15                        | 50                         | 135          |
| In-Town Families                                      | 115                          | 0                             | 15                        | 45                         | 175          |
| New American Strivers                                 | 80                           | 0                             | 40                        | 80                         | 200          |
| <i>Subtotal:</i>                                      | <u>310</u>                   | <u>0</u>                      | <u>85</u>                 | <u>220</u>                 | <u>615</u>   |
| <i>Metropolitan Suburbs</i>                           |                              |                               |                           |                            |              |
| Corporate Establishment                               | 0                            | 0                             | 0                         | 15                         | 15           |
| Nouveau Money   | 0                            | 0                             | 0                         | 20                         | 20           |
| Button-Down Families                                  | 10                           | 0                             | 0                         | 25                         | 35           |
| Fiber-Optic Families                                  | 5                            | 0                             | 0                         | 10                         | 15           |
| Late-Nest Suburbanites                                | 20                           | 0                             | 10                        | 30                         | 60           |
| Full-Nest Suburbanites                                | 25                           | 0                             | 10                        | 30                         | 65           |
| Kids 'r' Us   | 30                           | 0                             | 10                        | 40                         | 80           |
| <i>Subtotal:</i>                                      | <u>90</u>                    | <u>0</u>                      | <u>30</u>                 | <u>170</u>                 | <u>290</u>   |
| <i>Town &amp; Country/Exurbs</i>                      |                              |                               |                           |                            |              |
| Ex-Urban Elite  | 45                           | 0                             | 5                         | 40                         | 90           |
| New Town Families                                     | 25                           | 0                             | 5                         | 20                         | 50           |
| Full-Nest Exurbanites                                 | 15                           | 35                            | 10                        | 45                         | 105          |
| Rural Families  | 35                           | 30                            | 5                         | 45                         | 115          |
| Traditional Families                                  | 25                           | 0                             | 15                        | 20                         | 60           |
| Small-Town Families                                   | 380                          | 5                             | 30                        | 75                         | 490          |
| Four-by-Four Families                                 | 150                          | 5                             | 20                        | 50                         | 225          |
| Rustic Families                                       | 85                           | 100                           | 15                        | 120                        | 320          |
| Hometown Families                                     | 580                          | 0                             | 20                        | 70                         | 670          |
| <i>Subtotal:</i>                                      | <u>1,340</u>                 | <u>175</u>                    | <u>125</u>                | <u>485</u>                 | <u>2,125</u> |

SOURCE: Claritas, Inc.;  
Zimmerman/Volk Associates, Inc.

**Annual Average Number Of Households With The Potential  
To Move Within/To Macon-Bibb County Each Year Over The Next Five Years**

Summary: Appendix One, Tables 3 Through 6

*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

|  | <u>Macon-Bibb<br/>County</u> | <u>Regional<br/>Draw Area</u> | <u>Houston<br/>County</u> | <u>Balance<br/>of U.S.</u> | <u>Total</u> |
|--|------------------------------|-------------------------------|---------------------------|----------------------------|--------------|
| <b>Younger<br/>Singles &amp; Couples</b> | <b>2,690</b>                 | <b>160</b>                    | <b>195</b>                | <b>1,230</b>               | <b>4,275</b> |
| <i>Metropolitan Cities</i>               |                              |                               |                           |                            |              |
| New Power Couples                        | 0                            | 0                             | 0                         | 15                         | 15           |
| New Bohemians                            | 0                            | 0                             | 0                         | 115                        | 115          |
| Cosmopolitan Elite                       | 0                            | 0                             | 0                         | 10                         | 10           |
| Downtown Couples                         | 0                            | 0                             | 0                         | 75                         | 75           |
| Downtown Proud                           | 0                            | 0                             | 0                         | 105                        | 105          |
| <i>Subtotal:</i>                         | <u>0</u>                     | <u>0</u>                      | <u>0</u>                  | <u>320</u>                 | <u>320</u>   |
| <i>Small Cities/Satellite Cities</i>     |                              |                               |                           |                            |              |
| The VIPs                                 | 50                           | 0                             | 10                        | 55                         | 115          |
| Small-City Singles                       | 125                          | 0                             | 35                        | 75                         | 235          |
| Twentysomethings                         | 300                          | 0                             | 20                        | 130                        | 450          |
| Second-City Strivers                     | 235                          | 0                             | 20                        | 65                         | 320          |
| Multi-Ethnic Singles                     | 1,060                        | 0                             | 25                        | 70                         | 1,155        |
| <i>Subtotal:</i>                         | <u>1,770</u>                 | <u>0</u>                      | <u>110</u>                | <u>395</u>                 | <u>2,275</u> |
| <i>Metropolitan Suburbs</i>              |                              |                               |                           |                            |              |
| Fast-Track Professionals                 | 40                           | 0                             | 15                        | 60                         | 115          |
| Suburban Achievers                       | 55                           | 0                             | 10                        | 25                         | 90           |
| Suburban Strivers                        | 165                          | 0                             | 15                        | 125                        | 305          |
| <i>Subtotal:</i>                         | <u>260</u>                   | <u>0</u>                      | <u>40</u>                 | <u>210</u>                 | <u>510</u>   |
| <i>Town &amp; Country/Exurbs</i>         |                              |                               |                           |                            |              |
| Hometown Sweethearts                     | 90                           | 5                             | 10                        | 40                         | 145          |
| Blue-Collar Traditionalists              | 20                           | 30                            | 5                         | 60                         | 115          |
| Rural Couples                            | 135                          | 110                           | 10                        | 125                        | 380          |
| Rural Strivers                           | 415                          | 15                            | 20                        | 80                         | 530          |
| <i>Subtotal:</i>                         | <u>660</u>                   | <u>160</u>                    | <u>45</u>                 | <u>305</u>                 | <u>1,170</u> |

**Annual Average Number Of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years**

*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| <u>Household Type/<br/>Geographic Designation</u>     | <u>Macon-Bibb<br/>County</u> | <u>Regional<br/>Draw Area</u> | <u>Houston<br/>County</u> | <u>Balance<br/>of U.S.</u> | <u>Total</u>  |
|---|------------------------------|-------------------------------|---------------------------|----------------------------|---------------|
| <b>Empty Nesters<br/>&amp; Retirees</b>               | <b>475</b>                   | <b>10</b>                     | <b>50</b>                 | <b>345</b>                 | <b>880</b>    |
| <i>Metropolitan Cities</i>                            | 0                            | 0                             | 0                         | 115                        | 115           |
| <i>Small Cities/Satellite Cities</i>                  | 325                          | 0                             | 20                        | 95                         | 440           |
| <i>Metropolitan Suburbs</i>                           | 90                           | 0                             | 20                        | 95                         | 205           |
| <i>Town &amp; Country/Exurbs</i>                      | 60                           | 10                            | 10                        | 40                         | 120           |
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>140</b>                   | <b>0</b>                      | <b>40</b>                 | <b>245</b>                 | <b>425</b>    |
| <i>Metropolitan Cities</i>                            | 0                            | 0                             | 0                         | 100                        | 100           |
| <i>Small Cities/Satellite Cities</i>                  | 120                          | 0                             | 35                        | 90                         | 245           |
| <i>Metropolitan Suburbs</i>                           | 20                           | 0                             | 5                         | 55                         | 80            |
| <i>Town &amp; Country/Exurbs</i>                      | 0                            | 0                             | 0                         | 0                          | 0             |
| <b>Younger<br/>Singles &amp; Couples</b>              | <b>835</b>                   | <b>0</b>                      | <b>80</b>                 | <b>605</b>                 | <b>1,520</b>  |
| <i>Metropolitan Cities</i>                            | 0                            | 0                             | 0                         | 320                        | 320           |
| <i>Small Cities/Satellite Cities</i>                  | 740                          | 0                             | 55                        | 190                        | 985           |
| <i>Metropolitan Suburbs</i>                           | 95                           | 0                             | 25                        | 95                         | 215           |
| <i>Town &amp; Country/Exurbs</i>                      | 0                            | 0                             | 0                         | 0                          | 0             |
| <b>Total:</b>   | <b>1,450</b>                 | <b>10</b>                     | <b>170</b>                | <b>1,195</b>               | <b>2,825</b>  |
| <b>Percent:</b>                                       | <b>51.3%</b>                 | <b>0.4%</b>                   | <b>6.0%</b>               | <b>42.3%</b>               | <b>100.0%</b> |

**Annual Average Number Of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years**

*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

|   | <u>Macon-Bibb<br/>County</u> | <u>Regional<br/>Draw Area</u> | <u>Houston<br/>County</u> | <u>Balance<br/>of U.S.</u> | <u>Total</u> |
|---|------------------------------|-------------------------------|---------------------------|----------------------------|--------------|
| <b>Empty Nesters<br/>&amp; Retirees</b> | <b>475</b>                   | <b>10</b>                     | <b>50</b>                 | <b>345</b>                 | <b>880</b>   |
| <i>Metropolitan Cities</i>              |                              |                               |                           |                            |              |
| The Social Register                     | 0                            | 0                             | 0                         | 10                         | 10           |
| Urban Establishment                     | 0                            | 0                             | 0                         | 40                         | 40           |
| Multi-Ethnic Empty Nesters              | 0                            | 0                             | 0                         | 20                         | 20           |
| Cosmopolitan Couples                    | 0                            | 0                             | 0                         | 45                         | 45           |
| <i>Subtotal:</i>                        | <u>0</u>                     | <u>0</u>                      | <u>0</u>                  | <u>115</u>                 | <u>115</u>   |
| <i>Small Cities/Satellite Cities</i>    |                              |                               |                           |                            |              |
| Second City Establishment               | 5                            | 0                             | 0                         | 15                         | 20           |
| Blue-Collar Retirees                    | 40                           | 0                             | 10                        | 35                         | 85           |
| Middle-Class Move-Downs                 | 10                           | 0                             | 0                         | 10                         | 20           |
| Hometown Seniors                        | 55                           | 0                             | 5                         | 5                          | 65           |
| Second City Seniors                     | 215                          | 0                             | 5                         | 30                         | 250          |
| <i>Subtotal:</i>                        | <u>325</u>                   | <u>0</u>                      | <u>20</u>                 | <u>95</u>                  | <u>440</u>   |
| <i>Metropolitan Suburbs</i>             |                              |                               |                           |                            |              |
| The One Percenters                      | 0                            | 0                             | 0                         | 10                         | 10           |
| Old Money                               | 0                            | 0                             | 0                         | 10                         | 10           |
| Affluent Empty Nesters                  | 0                            | 0                             | 0                         | 10                         | 10           |
| Mainstream Empty Nesters                | 30                           | 0                             | 10                        | 30                         | 70           |
| Middle-American Retirees                | 60                           | 0                             | 10                        | 35                         | 105          |
| <i>Subtotal:</i>                        | <u>90</u>                    | <u>0</u>                      | <u>20</u>                 | <u>95</u>                  | <u>205</u>   |
| <i>Town &amp; Country/Exurbs</i>        |                              |                               |                           |                            |              |
| Small-Town Patriarchs                   | 30                           | 0                             | 5                         | 15                         | 50           |
| Pillars of the Community                | 25                           | 0                             | 5                         | 15                         | 45           |
| New Empty Nesters                       | 5                            | 10                            | 0                         | 10                         | 25           |
| <i>Subtotal:</i>                        | <u>60</u>                    | <u>10</u>                     | <u>10</u>                 | <u>40</u>                  | <u>120</u>   |

**Annual Average Number Of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years**

*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

|   | <u>Macon-Bibb<br/>County</u> | <u>Regional<br/>Draw Area</u> | <u>Houston<br/>County</u> | <u>Balance<br/>of U.S.</u> | <u>Total</u> |
|---|------------------------------|-------------------------------|---------------------------|----------------------------|--------------|
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>140</b>                   | <b>0</b>                      | <b>40</b>                 | <b>245</b>                 | <b>425</b>   |
| <i>Metropolitan Cities</i>                            |                              |                               |                           |                            |              |
| e-Type Families                                       | 0                            | 0                             | 0                         | 10                         | 10           |
| Multi-Cultural Families                               | 0                            | 0                             | 0                         | 15                         | 15           |
| Inner-City Families                                   | 0                            | 0                             | 0                         | 50                         | 50           |
| Single-Parent Families                                | 0                            | 0                             | 0                         | 25                         | 25           |
| <i>Subtotal:</i>                                      | <u>0</u>                     | <u>0</u>                      | <u>0</u>                  | <u>100</u>                 | <u>100</u>   |
| <i>Small Cities/Satellite Cities</i>                  |                              |                               |                           |                            |              |
| Unibox Transferees                                    | 10                           | 0                             | 0                         | 10                         | 20           |
| Multi-Ethnic Families                                 | 15                           | 0                             | 10                        | 15                         | 40           |
| Uptown Families                                       | 25                           | 0                             | 5                         | 20                         | 50           |
| In-Town Families                                      | 40                           | 0                             | 5                         | 15                         | 60           |
| New American Strivers                                 | 30                           | 0                             | 15                        | 30                         | 75           |
| <i>Subtotal:</i>                                      | <u>120</u>                   | <u>0</u>                      | <u>35</u>                 | <u>90</u>                  | <u>245</u>   |
| <i>Metropolitan Suburbs</i>                           |                              |                               |                           |                            |              |
| Corporate Establishment                               | 0                            | 0                             | 0                         | 10                         | 10           |
| Nouveau Money   | 0                            | 0                             | 0                         | 10                         | 10           |
| Button-Down Families                                  | 5                            | 0                             | 0                         | 15                         | 20           |
| Fiber-Optic Families                                  | 5                            | 0                             | 0                         | 5                          | 10           |
| Late-Nest Suburbanites                                | 10                           | 0                             | 5                         | 15                         | 30           |
| <i>Subtotal:</i>                                      | <u>20</u>                    | <u>0</u>                      | <u>5</u>                  | <u>55</u>                  | <u>80</u>    |

**Annual Average Number Of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years**

*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

|  | <u>Macon-Bibb<br/>County</u> | <u>Regional<br/>Draw Area</u> | <u>Houston<br/>County</u> | <u>Balance<br/>of U.S.</u> | <u>Total</u> |
|--|------------------------------|-------------------------------|---------------------------|----------------------------|--------------|
| <b>Younger<br/>Singles &amp; Couples</b> | <b>835</b>                   | <b>0</b>                      | <b>80</b>                 | <b>605</b>                 | <b>1,520</b> |
| <i>Metropolitan Cities</i>               |                              |                               |                           |                            |              |
| New Power Couples                        | 0                            | 0                             | 0                         | 15                         | 15           |
| New Bohemians                            | 0                            | 0                             | 0                         | 115                        | 115          |
| Cosmopolitan Elite                       | 0                            | 0                             | 0                         | 10                         | 10           |
| Downtown Couples                         | 0                            | 0                             | 0                         | 75                         | 75           |
| Downtown Proud                           | 0                            | 0                             | 0                         | 105                        | 105          |
| <i>Subtotal:</i>                         | <u>0</u>                     | <u>0</u>                      | <u>0</u>                  | <u>320</u>                 | <u>320</u>   |
| <i>Small Cities/Satellite Cities</i>     |                              |                               |                           |                            |              |
| The VIPs                                 | 50                           | 0                             | 10                        | 55                         | 115          |
| Small-City Singles                       | 50                           | 0                             | 15                        | 30                         | 95           |
| Twentysomethings                         | 120                          | 0                             | 10                        | 50                         | 180          |
| Second-City Strivers                     | 95                           | 0                             | 10                        | 25                         | 130          |
| Multi-Ethnic Singles                     | 425                          | 0                             | 10                        | 30                         | 465          |
| <i>Subtotal:</i>                         | <u>740</u>                   | <u>0</u>                      | <u>55</u>                 | <u>190</u>                 | <u>985</u>   |
| <i>Metropolitan Suburbs</i>              |                              |                               |                           |                            |              |
| Fast-Track Professionals                 | 40                           | 0                             | 15                        | 60                         | 115          |
| Suburban Achievers                       | 15                           | 0                             | 5                         | 5                          | 25           |
| Suburban Strivers                        | 40                           | 0                             | 5                         | 30                         | 75           |
| <i>Subtotal:</i>                         | <u>95</u>                    | <u>0</u>                      | <u>25</u>                 | <u>95</u>                  | <u>215</u>   |

**Tenure (Renter/Buyer) Profile**

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years

*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| <u>Household Type/<br/>Geographic Designation</u>     | <u>Potential<br/>Renters</u> | <u>Potential<br/>Owners</u> | <u>Total</u>  |
|---|------------------------------|-----------------------------|---------------|
| <b>Empty Nesters<br/>&amp; Retirees</b>               | <b>406</b>                   | <b>474</b>                  | <b>880</b>    |
| <i>Metropolitan Cities</i>                            | 77                           | 38                          | 115           |
| <i>Small Cities/Satellite Cities</i>                  | 253                          | 187                         | 440           |
| <i>Metropolitan Suburbs</i>                           | 60                           | 145                         | 205           |
| <i>Town &amp; Country/Exurbs</i>                      | 16                           | 104                         | 120           |
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>203</b>                   | <b>222</b>                  | <b>425</b>    |
| <i>Metropolitan Cities</i>                            | 56                           | 44                          | 100           |
| <i>Small Cities/Satellite Cities</i>                  | 126                          | 119                         | 245           |
| <i>Metropolitan Suburbs</i>                           | 21                           | 59                          | 80            |
| <i>Town &amp; Country/Exurbs</i>                      | 0                            | 0                           | 0             |
| <b>Younger<br/>Singles &amp; Couples</b>              | <b>1,175</b>                 | <b>345</b>                  | <b>1,520</b>  |
| <i>Metropolitan Cities</i>                            | 247                          | 73                          | 320           |
| <i>Small Cities/Satellite Cities</i>                  | 762                          | 223                         | 985           |
| <i>Metropolitan Suburbs</i>                           | 166                          | 49                          | 215           |
| <i>Town &amp; Country/Exurbs</i>                      | 0                            | 0                           | 0             |
| <b>Total:</b>   | <b>1,784</b>                 | <b>1,041</b>                | <b>2,825</b>  |
| <b>Percent:</b>                                       | <b>63.2%</b>                 | <b>36.8%</b>                | <b>100.0%</b> |

**Tenure (Renter/Buyer) Profile**

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years

*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| <b>Empty Nesters<br/>&amp; Retirees</b>     | <i>Potential<br/>Renters</i> | <i>Potential<br/>Owners</i> | Total         |
|---|------------------------------|-----------------------------|---------------|
| <b><i>Metropolitan Cities</i></b>           |                              |                             |               |
| The Social Register                         | 2                            | 8                           | 10            |
| Urban Establishment                         | 30                           | 10                          | 40            |
| Multi-Ethnic Empty Nesters                  | 8                            | 12                          | 20            |
| Cosmopolitan Couples                        | 37                           | 8                           | 45            |
| <i>Subtotal:</i>                            | <u>77</u>                    | <u>38</u>                   | <u>115</u>    |
| <b><i>Small Cities/Satellite Cities</i></b> |                              |                             |               |
| Second City Establishment                   | 3                            | 17                          | 20            |
| Blue-Collar Retirees                        | 27                           | 58                          | 85            |
| Middle-Class Move-Downs                     | 5                            | 15                          | 20            |
| Hometown Seniors                            | 28                           | 37                          | 65            |
| Second City Seniors                         | 190                          | 60                          | 250           |
| <i>Subtotal:</i>                            | <u>253</u>                   | <u>187</u>                  | <u>440</u>    |
| <b><i>Metropolitan Suburbs</i></b>          |                              |                             |               |
| The One Percenters                          | 1                            | 9                           | 10            |
| Old Money                                   | 2                            | 8                           | 10            |
| Affluent Empty Nesters                      | 1                            | 9                           | 10            |
| Mainstream Empty Nesters                    | 26                           | 44                          | 70            |
| Middle-American Retirees                    | 30                           | 75                          | 105           |
| <i>Subtotal:</i>                            | <u>60</u>                    | <u>145</u>                  | <u>205</u>    |
| <b><i>Town &amp; Country/Exurbs</i></b>     |                              |                             |               |
| Small-Town Patriarchs                       | 7                            | 43                          | 50            |
| Pillars of the Community                    | 6                            | 39                          | 45            |
| New Empty Nesters                           | 3                            | 22                          | 25            |
| <i>Subtotal:</i>                            | <u>16</u>                    | <u>104</u>                  | <u>120</u>    |
| <b>Total:</b>                               | <b>406</b>                   | <b>474</b>                  | <b>880</b>    |
| <b>Percent:</b>                             | <b>46.1%</b>                 | <b>53.9%</b>                | <b>100.0%</b> |

**Tenure (Renter/Buyer) Profile**

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years

*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <i>Potential<br/>Renters</i> | <i>Potential<br/>Owners</i> | Total         |
|---|------------------------------|-----------------------------|---------------|
| <b><i>Metropolitan Cities</i></b>                     |                              |                             |               |
| e-Type Families                                       | 3                            | 7                           | 10            |
| Multi-Cultural Families                               | 5                            | 10                          | 15            |
| Inner-City Families                                   | 32                           | 18                          | 50            |
| Single-Parent Families                                | 16                           | 9                           | 25            |
| <i>Subtotal:</i>                                      | <u>56</u>                    | <u>44</u>                   | <u>100</u>    |
| <b><i>Small Cities/Satellite Cities</i></b>           |                              |                             |               |
| Unibox Transferees                                    | 6                            | 14                          | 20            |
| Multi-Ethnic Families                                 | 17                           | 23                          | 40            |
| Uptown Families                                       | 22                           | 28                          | 50            |
| In-Town Families                                      | 25                           | 35                          | 60            |
| New American Strivers                                 | 56                           | 19                          | 75            |
| <i>Subtotal:</i>                                      | <u>126</u>                   | <u>119</u>                  | <u>245</u>    |
| <b><i>Metropolitan Suburbs</i></b>                    |                              |                             |               |
| Corporate Establishment                               | 1                            | 9                           | 10            |
| Nouveau Money   | 2                            | 8                           | 10            |
| Button-Down Families                                  | 3                            | 17                          | 20            |
| Fiber-Optic Families                                  | 1                            | 9                           | 10            |
| Late-Nest Suburbanites                                | 14                           | 16                          | 30            |
| <i>Subtotal:</i>                                      | <u>21</u>                    | <u>59</u>                   | <u>80</u>     |
| <b>Total:</b>   | <b>203</b>                   | <b>222</b>                  | <b>425</b>    |
| <b>Percent:</b>                                       | <b>47.8%</b>                 | <b>52.2%</b>                | <b>100.0%</b> |

**Tenure (Renter/Buyer) Profile**

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years

*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| <b>Younger<br/>Singles &amp; Couples</b>    | <i>Potential<br/>Renters</i> | <i>Potential<br/>Owners</i> | Total         |
|---|------------------------------|-----------------------------|---------------|
| <b><i>Metropolitan Cities</i></b>           |                              |                             |               |
| New Power Couples                           | 8                            | 7                           | 15            |
| New Bohemians                               | 98                           | 17                          | 115           |
| Cosmopolitan Elite                          | 4                            | 6                           | 10            |
| Downtown Couples                            | 43                           | 32                          | 75            |
| Downtown Proud                              | 94                           | 11                          | 105           |
| <i>Subtotal:</i>                            | <u>247</u>                   | <u>73</u>                   | <u>320</u>    |
| <b><i>Small Cities/Satellite Cities</i></b> |                              |                             |               |
| The VIPs                                    | 81                           | 34                          | 115           |
| Small-City Singles                          | 41                           | 54                          | 95            |
| Twentysomethings                            | 162                          | 18                          | 180           |
| Second-City Strivers                        | 113                          | 17                          | 130           |
| Multi-Ethnic Singles                        | 365                          | 100                         | 465           |
| <i>Subtotal:</i>                            | <u>762</u>                   | <u>223</u>                  | <u>985</u>    |
| <b><i>Metropolitan Suburbs</i></b>          |                              |                             |               |
| Fast-Track Professionals                    | 106                          | 9                           | 115           |
| Suburban Achievers                          | 11                           | 14                          | 25            |
| Suburban Strivers                           | 49                           | 26                          | 75            |
| <i>Subtotal:</i>                            | <u>166</u>                   | <u>49</u>                   | <u>215</u>    |
| <b>Total:</b>                               | <b>1,175</b>                 | <b>345</b>                  | <b>1,520</b>  |
| <b>Percent:</b>                             | <b>77.3%</b>                 | <b>22.7%</b>                | <b>100.0%</b> |

**Purchase Propensity By Housing Type**  
 Annual Average Number of Households With The Potential To Move  
 To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
 Houston County, and Balance of the United States*

| Household Type/<br>Geographic Designation             | .. Multi-Family .. | ..... Single-Family ..... |                    | Total         |
|---|--------------------|---------------------------|--------------------|---------------|
|   |                    | .... Attached ....        | .... Detached .... |               |
| <b>Empty Nesters<br/>&amp; Retirees</b>               |                    |                           |                    |               |
|   | 77                 | 95                        | 302                | 474           |
| <i>Metropolitan Cities</i>                            | 13                 | 12                        | 13                 | 38            |
| <i>Small Cities/Satellite Cities</i>                  | 42                 | 43                        | 102                | 187           |
| <i>Metropolitan Suburbs</i>                           | 17                 | 28                        | 100                | 145           |
| <i>Town &amp; Country/Exurbs</i>                      | 5                  | 12                        | 87                 | 104           |
| <b>Traditional &amp;<br/>Non-Traditional Families</b> |                    |                           |                    |               |
|   | 34                 | 56                        | 132                | 222           |
| <i>Metropolitan Cities</i>                            | 9                  | 15                        | 20                 | 44            |
| <i>Small Cities/Satellite Cities</i>                  | 18                 | 30                        | 71                 | 119           |
| <i>Metropolitan Suburbs</i>                           | 7                  | 11                        | 41                 | 59            |
| <i>Town &amp; Country/Exurbs</i>                      | 0                  | 0                         | 0                  | 0             |
| <b>Younger<br/>Singles &amp; Couples</b>              |                    |                           |                    |               |
|   | 108                | 118                       | 119                | 345           |
| <i>Metropolitan Cities</i>                            | 29                 | 24                        | 20                 | 73            |
| <i>Small Cities/Satellite Cities</i>                  | 65                 | 79                        | 79                 | 223           |
| <i>Metropolitan Suburbs</i>                           | 14                 | 15                        | 20                 | 49            |
| <i>Town &amp; Country/Exurbs</i>                      | 0                  | 0                         | 0                  | 0             |
| <b>Total:</b>   | <b>219</b>         | <b>269</b>                | <b>553</b>         | <b>1,041</b>  |
| <b>Percent:</b>                                       | <b>21.0%</b>       | <b>25.9%</b>              | <b>53.1%</b>       | <b>100.0%</b> |

**Purchase Propensity By Housing Type**  
 Annual Average Number of Households With The Potential To Move  
 To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
 Houston County, and Balance of the United States*

| <b>Empty Nesters<br/>&amp; Retirees</b> | <i>.. Multi-Family ..</i> | <i>..... Single-Family .....</i> |                           | <b>Total</b>  |
|---|---------------------------|----------------------------------|---------------------------|---------------|
|   |                           | <i>.... Attached ....</i>        | <i>.... Detached ....</i> |               |
| <b>Metropolitan Cities</b>              |                           |                                  |                           |               |
| The Social Register                     | 1                         | 1                                | 6                         | 8             |
| Urban Establishment                     | 5                         | 4                                | 1                         | 10            |
| Multi-Ethnic Empty Nesters              | 2                         | 4                                | 6                         | 12            |
| Cosmopolitan Couples                    | 5                         | 3                                | 0                         | 8             |
| <i>Subtotal:</i>                        | <u>13</u>                 | <u>12</u>                        | <u>13</u>                 | <u>38</u>     |
| <b>Small Cities/Satellite Cities</b>    |                           |                                  |                           |               |
| Second City Establishment               | 1                         | 2                                | 14                        | 17            |
| Blue-Collar Retirees                    | 6                         | 11                               | 41                        | 58            |
| Middle-Class Move-Downs                 | 4                         | 4                                | 7                         | 15            |
| Hometown Seniors                        | 6                         | 8                                | 23                        | 37            |
| Second City Seniors                     | 25                        | 18                               | 17                        | 60            |
| <i>Subtotal:</i>                        | <u>42</u>                 | <u>43</u>                        | <u>102</u>                | <u>187</u>    |
| <b>Metropolitan Suburbs</b>             |                           |                                  |                           |               |
| The One Percenters                      | 0                         | 1                                | 8                         | 9             |
| Old Money                               | 1                         | 1                                | 6                         | 8             |
| Affluent Empty Nesters                  | 0                         | 1                                | 8                         | 9             |
| Mainstream Empty Nesters                | 6                         | 11                               | 27                        | 44            |
| Middle-American Retirees                | 10                        | 14                               | 51                        | 75            |
| <i>Subtotal:</i>                        | <u>17</u>                 | <u>28</u>                        | <u>100</u>                | <u>145</u>    |
| <b>Town &amp; Country/Exurbs</b>        |                           |                                  |                           |               |
| Small-Town Patriarchs                   | 3                         | 6                                | 34                        | 43            |
| Pillars of the Community                | 1                         | 4                                | 34                        | 39            |
| New Empty Nesters                       | 1                         | 2                                | 19                        | 22            |
| <i>Subtotal:</i>                        | <u>5</u>                  | <u>12</u>                        | <u>87</u>                 | <u>104</u>    |
| <b>Total:</b>                           | <b>77</b>                 | <b>95</b>                        | <b>302</b>                | <b>474</b>    |
| <b>Percent:</b>                         | <b>16.3%</b>              | <b>20.0%</b>                     | <b>63.7%</b>              | <b>100.0%</b> |

### Purchase Propensity By Housing Type

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| Traditional &<br>Non-Traditional Families | .. Multi-Family .. | ..... Single-Family ..... |                    | Total         |
|---|--------------------|---------------------------|--------------------|---------------|
|   |                    | .... Attached ....        | .... Detached .... |               |
| <i>Metropolitan Cities</i>                |                    |                           |                    |               |
| e-Type Families                           | 1                  | 2                         | 4                  | 7             |
| Multi-Cultural Families                   | 1                  | 3                         | 6                  | 10            |
| Inner-City Families                       | 5                  | 7                         | 6                  | 18            |
| Single-Parent Families                    | 2                  | 3                         | 4                  | 9             |
| <i>Subtotal:</i>                          | <u>9</u>           | <u>15</u>                 | <u>20</u>          | <u>44</u>     |
| <i>Small Cities/Satellite Cities</i>      |                    |                           |                    |               |
| Unibox Transferees                        | 1                  | 3                         | 10                 | 14            |
| Multi-Ethnic Families                     | 3                  | 5                         | 15                 | 23            |
| Uptown Families                           | 4                  | 7                         | 17                 | 28            |
| In-Town Families                          | 4                  | 7                         | 24                 | 35            |
| New American Strivers                     | 6                  | 8                         | 5                  | 19            |
| <i>Subtotal:</i>                          | <u>18</u>          | <u>30</u>                 | <u>71</u>          | <u>119</u>    |
| <i>Metropolitan Suburbs</i>               |                    |                           |                    |               |
| Corporate Establishment                   | 1                  | 1                         | 7                  | 9             |
| Nouveau Money                             | 1                  | 2                         | 5                  | 8             |
| Button-Down Families                      | 1                  | 2                         | 14                 | 17            |
| Fiber-Optic Families                      | 0                  | 1                         | 8                  | 9             |
| Late-Nest Suburbanites                    | 4                  | 5                         | 7                  | 16            |
| <i>Subtotal:</i>                          | <u>7</u>           | <u>11</u>                 | <u>41</u>          | <u>59</u>     |
| <b>Total:</b>                             | <b>34</b>          | <b>56</b>                 | <b>132</b>         | <b>222</b>    |
| <b>Percent:</b>                           | <b>15.3%</b>       | <b>25.2%</b>              | <b>59.5%</b>       | <b>100.0%</b> |

**Purchase Propensity By Housing Type**  
 Annual Average Number of Households With The Potential To Move  
 To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
 Houston County, and Balance of the United States*

| <b>Younger<br/>Singles &amp; Couples</b>    | <i>.. Multi-Family ..</i> | <i>..... Single-Family .....</i> |                           | <b>Total</b>  |
|---|---------------------------|----------------------------------|---------------------------|---------------|
|   |                           | <i>.... Attached ....</i>        | <i>.... Detached ....</i> |               |
| <b><i>Metropolitan Cities</i></b>           |                           |                                  |                           |               |
| New Power Couples                           | 2                         | 2                                | 3                         | 7             |
| New Bohemians                               | 12                        | 4                                | 1                         | 17            |
| Cosmopolitan Elite                          | 2                         | 2                                | 2                         | 6             |
| Downtown Couples                            | 7                         | 12                               | 13                        | 32            |
| Downtown Proud                              | 6                         | 4                                | 1                         | 11            |
| <i>Subtotal:</i>                            | <u>29</u>                 | <u>24</u>                        | <u>20</u>                 | <u>73</u>     |
| <b><i>Small Cities/Satellite Cities</i></b> |                           |                                  |                           |               |
| The VIPs                                    | 14                        | 13                               | 7                         | 34            |
| Small-City Singles                          | 6                         | 12                               | 36                        | 54            |
| Twentysomethings                            | 9                         | 7                                | 2                         | 18            |
| Second-City Strivers                        | 7                         | 7                                | 3                         | 17            |
| Multi-Ethnic Singles                        | 29                        | 40                               | 31                        | 100           |
| <i>Subtotal:</i>                            | <u>65</u>                 | <u>79</u>                        | <u>79</u>                 | <u>223</u>    |
| <b><i>Metropolitan Suburbs</i></b>          |                           |                                  |                           |               |
| Fast-Track Professionals                    | 6                         | 3                                | 0                         | 9             |
| Suburban Achievers                          | 2                         | 3                                | 9                         | 14            |
| Suburban Strivers                           | 6                         | 9                                | 11                        | 26            |
| <i>Subtotal:</i>                            | <u>14</u>                 | <u>15</u>                        | <u>20</u>                 | <u>49</u>     |
| <b>Total:</b>                               | <b>108</b>                | <b>118</b>                       | <b>119</b>                | <b>345</b>    |
| <b>Percent:</b>                             | <b>31.3%</b>              | <b>34.2%</b>                     | <b>34.5%</b>              | <b>100.0%</b> |

### Renter Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| Household Type/<br>Geographic Designation             | .....Renter Income Bands..... |                           |                           |                            |                           | Total         |
|---|-------------------------------|---------------------------|---------------------------|----------------------------|---------------------------|---------------|
|   | <i>Below<br/>30% AMI</i>      | <i>30% to<br/>60% AMI</i> | <i>60% to<br/>80% AMI</i> | <i>80% to<br/>100% AMI</i> | <i>Above<br/>100% AMI</i> |               |
| <b>Empty Nesters<br/>&amp; Retirees</b>               | <b>101</b>                    | <b>72</b>                 | <b>41</b>                 | <b>32</b>                  | <b>160</b>                | <b>406</b>    |
| <i>Metropolitan Cities</i>                            | 9                             | 7                         | 6                         | 6                          | 49                        | 77            |
| <i>Small Cities/Satellite Cities</i>                  | 86                            | 59                        | 31                        | 22                         | 55                        | 253           |
| <i>Metropolitan Suburbs</i>                           | 6                             | 6                         | 4                         | 4                          | 40                        | 60            |
| <i>Town &amp; Country/Exurbs</i>                      | 0                             | 0                         | 0                         | 0                          | 16                        | 16            |
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>58</b>                     | <b>24</b>                 | <b>25</b>                 | <b>21</b>                  | <b>75</b>                 | <b>203</b>    |
| <i>Metropolitan Cities</i>                            | 15                            | 6                         | 6                         | 6                          | 23                        | 56            |
| <i>Small Cities/Satellite Cities</i>                  | 41                            | 17                        | 18                        | 14                         | 36                        | 126           |
| <i>Metropolitan Suburbs</i>                           | 2                             | 1                         | 1                         | 1                          | 16                        | 21            |
| <i>Town &amp; Country/Exurbs</i>                      | 0                             | 0                         | 0                         | 0                          | 0                         | 0             |
| <b>Younger<br/>Singles &amp; Couples</b>              | <b>307</b>                    | <b>222</b>                | <b>127</b>                | <b>97</b>                  | <b>422</b>                | <b>1,175</b>  |
| <i>Metropolitan Cities</i>                            | 41                            | 31                        | 19                        | 17                         | 139                       | 247           |
| <i>Small Cities/Satellite Cities</i>                  | 244                           | 171                       | 92                        | 66                         | 189                       | 762           |
| <i>Metropolitan Suburbs</i>                           | 22                            | 20                        | 16                        | 14                         | 94                        | 166           |
| <i>Town &amp; Country/Exurbs</i>                      | 0                             | 0                         | 0                         | 0                          | 0                         | 0             |
| <b>Total:</b>   | <b>466</b>                    | <b>318</b>                | <b>193</b>                | <b>150</b>                 | <b>657</b>                | <b>1,784</b>  |
| <b>Percent:</b>                                       | <b>26.1%</b>                  | <b>17.8%</b>              | <b>10.8%</b>              | <b>8.4%</b>                | <b>36.9%</b>              | <b>100.0%</b> |

### Renter Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| Empty Nesters<br>& Retirees          | .....Renter Income Bands..... |                           |                           |                            |                           | Total         |
|--------------------------------------|-------------------------------|---------------------------|---------------------------|----------------------------|---------------------------|---------------|
|                                      | <i>Below<br/>30% AMI</i>      | <i>30% to<br/>60% AMI</i> | <i>60% to<br/>80% AMI</i> | <i>80% to<br/>100% AMI</i> | <i>Above<br/>100% AMI</i> |               |
| <i>Metropolitan Cities</i>           |                               |                           |                           |                            |                           |               |
| The Social Register                  | 0                             | 0                         | 0                         | 0                          | 2                         | 2             |
| Urban Establishment                  | 2                             | 2                         | 2                         | 2                          | 22                        | 30            |
| Multi-Ethnic Empty Nesters           | 1                             | 1                         | 1                         | 1                          | 4                         | 8             |
| Cosmopolitan Couples                 | 6                             | 4                         | 3                         | 3                          | 21                        | 37            |
| <i>Subtotal:</i>                     | <u>9</u>                      | <u>7</u>                  | <u>6</u>                  | <u>6</u>                   | <u>49</u>                 | <u>77</u>     |
| <i>Small Cities/Satellite Cities</i> |                               |                           |                           |                            |                           |               |
| Second City Establishment            | 0                             | 0                         | 0                         | 0                          | 3                         | 3             |
| Blue-Collar Retirees                 | 4                             | 4                         | 3                         | 3                          | 13                        | 27            |
| Middle-Class Move-Downs              | 1                             | 1                         | 1                         | 0                          | 2                         | 5             |
| Hometown Seniors                     | 9                             | 7                         | 4                         | 3                          | 5                         | 28            |
| Second City Seniors                  | 72                            | 47                        | 23                        | 16                         | 32                        | 190           |
| <i>Subtotal:</i>                     | <u>86</u>                     | <u>59</u>                 | <u>31</u>                 | <u>22</u>                  | <u>55</u>                 | <u>253</u>    |
| <i>Metropolitan Suburbs</i>          |                               |                           |                           |                            |                           |               |
| The One Percenters                   | 0                             | 0                         | 0                         | 0                          | 1                         | 1             |
| Old Money                            | 0                             | 0                         | 0                         | 0                          | 2                         | 2             |
| Affluent Empty Nesters               | 0                             | 0                         | 0                         | 0                          | 1                         | 1             |
| Mainstream Empty Nesters             | 3                             | 3                         | 2                         | 2                          | 16                        | 26            |
| Middle-American Retirees             | 3                             | 3                         | 2                         | 2                          | 20                        | 30            |
| <i>Subtotal:</i>                     | <u>6</u>                      | <u>6</u>                  | <u>4</u>                  | <u>4</u>                   | <u>40</u>                 | <u>60</u>     |
| <i>Town &amp; Country/Exurbs</i>     |                               |                           |                           |                            |                           |               |
| Small-Town Patriarchs                | 0                             | 0                         | 0                         | 0                          | 7                         | 7             |
| Pillars of the Community             | 0                             | 0                         | 0                         | 0                          | 6                         | 6             |
| New Empty Nesters                    | 0                             | 0                         | 0                         | 0                          | 3                         | 3             |
| <i>Subtotal:</i>                     | <u>0</u>                      | <u>0</u>                  | <u>0</u>                  | <u>0</u>                   | <u>16</u>                 | <u>16</u>     |
| <b>Total:</b>                        | <b>101</b>                    | <b>72</b>                 | <b>41</b>                 | <b>32</b>                  | <b>160</b>                | <b>406</b>    |
| <b>Percent:</b>                      | <b>24.9%</b>                  | <b>17.7%</b>              | <b>10.1%</b>              | <b>7.9%</b>                | <b>39.4%</b>              | <b>100.0%</b> |

### Renter Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| Traditional &<br>Non-Traditional Families | .....Renter Income Bands..... |                           |                           |                            |                           | Total         |
|---|-------------------------------|---------------------------|---------------------------|----------------------------|---------------------------|---------------|
|   | <i>Below<br/>30% AMI</i>      | <i>30% to<br/>60% AMI</i> | <i>60% to<br/>80% AMI</i> | <i>80% to<br/>100% AMI</i> | <i>Above<br/>100% AMI</i> |               |
| <i>Metropolitan Cities</i>                |                               |                           |                           |                            |                           |               |
| e-Type Families                           | 0                             | 0                         | 0                         | 0                          | 3                         | 3             |
| Multi-Cultural Families                   | 1                             | 0                         | 0                         | 1                          | 3                         | 5             |
| Inner-City Families                       | 10                            | 4                         | 4                         | 3                          | 11                        | 32            |
| Single-Parent Families                    | 4                             | 2                         | 2                         | 2                          | 6                         | 16            |
| <i>Subtotal:</i>                          | 15                            | 6                         | 6                         | 6                          | 23                        | 56            |
| <i>Small Cities/Satellite Cities</i>      |                               |                           |                           |                            |                           |               |
| Unibox Transferees                        | 1                             | 0                         | 0                         | 0                          | 5                         | 6             |
| Multi-Ethnic Families                     | 3                             | 1                         | 2                         | 2                          | 9                         | 17            |
| Uptown Families                           | 4                             | 2                         | 2                         | 3                          | 11                        | 22            |
| In-Town Families                          | 10                            | 4                         | 4                         | 3                          | 4                         | 25            |
| New American Strivers                     | 23                            | 10                        | 10                        | 6                          | 7                         | 56            |
| <i>Subtotal:</i>                          | 41                            | 17                        | 18                        | 14                         | 36                        | 126           |
| <i>Metropolitan Suburbs</i>               |                               |                           |                           |                            |                           |               |
| Corporate Establishment                   | 0                             | 0                         | 0                         | 0                          | 1                         | 1             |
| Nouveau Money                             | 0                             | 0                         | 0                         | 0                          | 2                         | 2             |
| Button-Down Families                      | 0                             | 0                         | 0                         | 0                          | 3                         | 3             |
| Fiber-Optic Families                      | 0                             | 0                         | 0                         | 0                          | 1                         | 1             |
| Late-Nest Suburbanites                    | 2                             | 1                         | 1                         | 1                          | 9                         | 14            |
| <i>Subtotal:</i>                          | 2                             | 1                         | 1                         | 1                          | 16                        | 21            |
| <b>Total:</b>                             | <b>58</b>                     | <b>24</b>                 | <b>25</b>                 | <b>21</b>                  | <b>75</b>                 | <b>203</b>    |
| <b>Percent:</b>                           | <b>28.6%</b>                  | <b>11.8%</b>              | <b>12.3%</b>              | <b>10.3%</b>               | <b>37.0%</b>              | <b>100.0%</b> |

### Renter Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| <b>Younger<br/>Singles &amp; Couples</b> | .....Renter Income Bands..... |                           |                           |                            |                           | <b>Total</b>  |
|--|-------------------------------|---------------------------|---------------------------|----------------------------|---------------------------|---------------|
|  | <i>Below<br/>30% AMI</i>      | <i>30% to<br/>60% AMI</i> | <i>60% to<br/>80% AMI</i> | <i>80% to<br/>100% AMI</i> | <i>Above<br/>100% AMI</i> |               |
| <b>Metropolitan Cities</b>               |                               |                           |                           |                            |                           |               |
| New Power Couples                        | 0                             | 0                         | 0                         | 0                          | 8                         | 8             |
| New Bohemians                            | 11                            | 7                         | 5                         | 5                          | 70                        | 98            |
| Cosmopolitan Elite                       | 0                             | 0                         | 0                         | 0                          | 4                         | 4             |
| Downtown Couples                         | 8                             | 8                         | 5                         | 4                          | 18                        | 43            |
| Downtown Proud                           | 22                            | 16                        | 9                         | 8                          | 39                        | 94            |
| <i>Subtotal:</i>                         | 41                            | 31                        | 19                        | 17                         | 139                       | 247           |
| <b>Small Cities/Satellite Cities</b>     |                               |                           |                           |                            |                           |               |
| The VIPs                                 | 7                             | 7                         | 6                         | 6                          | 55                        | 81            |
| Small-City Singles                       | 9                             | 9                         | 6                         | 5                          | 12                        | 41            |
| Twentysomethings                         | 47                            | 33                        | 23                        | 17                         | 42                        | 162           |
| Second-City Strivers                     | 33                            | 25                        | 16                        | 12                         | 27                        | 113           |
| Multi-Ethnic Singles                     | 148                           | 97                        | 41                        | 26                         | 53                        | 365           |
| <i>Subtotal:</i>                         | 244                           | 171                       | 92                        | 66                         | 189                       | 762           |
| <b>Metropolitan Suburbs</b>              |                               |                           |                           |                            |                           |               |
| Fast-Track Professionals                 | 9                             | 8                         | 7                         | 7                          | 75                        | 106           |
| Suburban Achievers                       | 2                             | 2                         | 1                         | 1                          | 5                         | 11            |
| Suburban Strivers                        | 11                            | 10                        | 8                         | 6                          | 14                        | 49            |
| <i>Subtotal:</i>                         | 22                            | 20                        | 16                        | 14                         | 94                        | 166           |
| <b>Total:</b>                            | <b>307</b>                    | <b>222</b>                | <b>127</b>                | <b>97</b>                  | <b>422</b>                | <b>1,175</b>  |
| <b>Percent:</b>                          | <b>26.1%</b>                  | <b>18.9%</b>              | <b>10.8%</b>              | <b>8.3%</b>                | <b>35.9%</b>              | <b>100.0%</b> |

### Owner Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| Household Type/<br>Geographic Designation             | Ownership Income Bands |                   |                   |                    |                   | Total         |
|---|------------------------|-------------------|-------------------|--------------------|-------------------|---------------|
|   | Below<br>30% AMI       | 30% to<br>60% AMI | 60% to<br>80% AMI | 80% to<br>100% AMI | Above<br>100% AMI |               |
| <b>Empty Nesters<br/>&amp; Retirees</b>               | <b>67</b>              | <b>55</b>         | <b>36</b>         | <b>31</b>          | <b>285</b>        | <b>474</b>    |
| <i>Metropolitan Cities</i>                            | 2                      | 2                 | 0                 | 0                  | 34                | 38            |
| <i>Small Cities/Satellite Cities</i>                  | 48                     | 36                | 21                | 16                 | 66                | 187           |
| <i>Metropolitan Suburbs</i>                           | 12                     | 12                | 10                | 10                 | 101               | 145           |
| <i>Town &amp; Country/Exurbs</i>                      | 5                      | 5                 | 5                 | 5                  | 84                | 104           |
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>45</b>              | <b>18</b>         | <b>23</b>         | <b>20</b>          | <b>116</b>        | <b>222</b>    |
| <i>Metropolitan Cities</i>                            | 10                     | 3                 | 4                 | 3                  | 24                | 44            |
| <i>Small Cities/Satellite Cities</i>                  | 30                     | 13                | 16                | 14                 | 46                | 119           |
| <i>Metropolitan Suburbs</i>                           | 5                      | 2                 | 3                 | 3                  | 46                | 59            |
| <i>Town &amp; Country/Exurbs</i>                      | 0                      | 0                 | 0                 | 0                  | 0                 | 0             |
| <b>Younger<br/>Singles &amp; Couples</b>              | <b>83</b>              | <b>64</b>         | <b>36</b>         | <b>30</b>          | <b>132</b>        | <b>345</b>    |
| <i>Metropolitan Cities</i>                            | 8                      | 8                 | 5                 | 5                  | 47                | 73            |
| <i>Small Cities/Satellite Cities</i>                  | 67                     | 50                | 26                | 21                 | 59                | 223           |
| <i>Metropolitan Suburbs</i>                           | 8                      | 6                 | 5                 | 4                  | 26                | 49            |
| <i>Town &amp; Country/Exurbs</i>                      | 0                      | 0                 | 0                 | 0                  | 0                 | 0             |
| <b>Total:</b>   | <b>195</b>             | <b>137</b>        | <b>95</b>         | <b>81</b>          | <b>533</b>        | <b>1,041</b>  |
| <b>Percent:</b>                                       | <b>18.7%</b>           | <b>13.2%</b>      | <b>9.1%</b>       | <b>7.8%</b>        | <b>51.2%</b>      | <b>100.0%</b> |

### Owner Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| Empty Nesters<br>& Retirees          | Ownership Income Bands |                   |                   |                    |                   | Total         |
|--------------------------------------|------------------------|-------------------|-------------------|--------------------|-------------------|---------------|
|                                      | Below<br>30% AMI       | 30% to<br>60% AMI | 60% to<br>80% AMI | 80% to<br>100% AMI | Above<br>100% AMI |               |
| <i>Metropolitan Cities</i>           |                        |                   |                   |                    |                   |               |
| The Social Register                  | 0                      | 0                 | 0                 | 0                  | 8                 | 8             |
| Urban Establishment                  | 0                      | 0                 | 0                 | 0                  | 10                | 10            |
| Multi-Ethnic Empty Nesters           | 0                      | 1                 | 0                 | 0                  | 11                | 12            |
| Cosmopolitan Couples                 | 2                      | 1                 | 0                 | 0                  | 5                 | 8             |
| <i>Subtotal:</i>                     | 2                      | 2                 | 0                 | 0                  | 34                | 38            |
| <i>Small Cities/Satellite Cities</i> |                        |                   |                   |                    |                   |               |
| Second City Establishment            | 1                      | 1                 | 1                 | 1                  | 13                | 17            |
| Blue-Collar Retirees                 | 9                      | 9                 | 7                 | 6                  | 27                | 58            |
| Middle-Class Move-Downs              | 3                      | 3                 | 1                 | 1                  | 7                 | 15            |
| Hometown Seniors                     | 13                     | 9                 | 5                 | 4                  | 6                 | 37            |
| Second City Seniors                  | 22                     | 14                | 7                 | 4                  | 13                | 60            |
| <i>Subtotal:</i>                     | 48                     | 36                | 21                | 16                 | 66                | 187           |
| <i>Metropolitan Suburbs</i>          |                        |                   |                   |                    |                   |               |
| The One Percenters                   | 0                      | 0                 | 0                 | 0                  | 9                 | 9             |
| Old Money                            | 0                      | 0                 | 0                 | 0                  | 8                 | 8             |
| Affluent Empty Nesters               | 0                      | 0                 | 0                 | 0                  | 9                 | 9             |
| Mainstream Empty Nesters             | 5                      | 5                 | 4                 | 4                  | 26                | 44            |
| Middle-American Retirees             | 7                      | 7                 | 6                 | 6                  | 49                | 75            |
| <i>Subtotal:</i>                     | 12                     | 12                | 10                | 10                 | 101               | 145           |
| <i>Town &amp; Country/Exurbs</i>     |                        |                   |                   |                    |                   |               |
| Small-Town Patriarchs                | 2                      | 2                 | 2                 | 2                  | 35                | 43            |
| Pillars of the Community             | 2                      | 2                 | 2                 | 2                  | 31                | 39            |
| New Empty Nesters                    | 1                      | 1                 | 1                 | 1                  | 18                | 22            |
| <i>Subtotal:</i>                     | 5                      | 5                 | 5                 | 5                  | 84                | 104           |
| <b>Total:</b>                        | <b>67</b>              | <b>55</b>         | <b>36</b>         | <b>31</b>          | <b>285</b>        | <b>474</b>    |
| <b>Percent:</b>                      | <b>14.1%</b>           | <b>11.6%</b>      | <b>7.6%</b>       | <b>6.5%</b>        | <b>60.1%</b>      | <b>100.0%</b> |

### Owner Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| Traditional &<br>Non-Traditional Families | Ownership Income Bands |                   |                   |                    |                   | Total         |
|---|------------------------|-------------------|-------------------|--------------------|-------------------|---------------|
|   | Below<br>30% AMI       | 30% to<br>60% AMI | 60% to<br>80% AMI | 80% to<br>100% AMI | Above<br>100% AMI |               |
| <i>Metropolitan Cities</i>                |                        |                   |                   |                    |                   |               |
| e-Type Families                           | 0                      | 0                 | 0                 | 0                  | 7                 | 7             |
| Multi-Cultural Families                   | 1                      | 0                 | 1                 | 1                  | 7                 | 10            |
| Inner-City Families                       | 6                      | 3                 | 3                 | 2                  | 4                 | 18            |
| Single-Parent Families                    | 3                      | 0                 | 0                 | 0                  | 6                 | 9             |
| <i>Subtotal:</i>                          | <u>10</u>              | <u>3</u>          | <u>4</u>          | <u>3</u>           | <u>24</u>         | <u>44</u>     |
| <i>Small Cities/Satellite Cities</i>      |                        |                   |                   |                    |                   |               |
| Unibox Transferees                        | 1                      | 1                 | 1                 | 1                  | 10                | 14            |
| Multi-Ethnic Families                     | 3                      | 1                 | 3                 | 3                  | 13                | 23            |
| Uptown Families                           | 5                      | 2                 | 3                 | 3                  | 15                | 28            |
| In-Town Families                          | 14                     | 6                 | 6                 | 4                  | 5                 | 35            |
| New American Strivers                     | 7                      | 3                 | 3                 | 3                  | 3                 | 19            |
| <i>Subtotal:</i>                          | <u>30</u>              | <u>13</u>         | <u>16</u>         | <u>14</u>          | <u>46</u>         | <u>119</u>    |
| <i>Metropolitan Suburbs</i>               |                        |                   |                   |                    |                   |               |
| Corporate Establishment                   | 0                      | 0                 | 0                 | 0                  | 9                 | 9             |
| Nouveau Money                             | 0                      | 0                 | 0                 | 0                  | 8                 | 8             |
| Button-Down Families                      | 1                      | 1                 | 1                 | 1                  | 13                | 17            |
| Fiber-Optic Families                      | 1                      | 0                 | 1                 | 1                  | 6                 | 9             |
| Late-Nest Suburbanites                    | 3                      | 1                 | 1                 | 1                  | 10                | 16            |
| <i>Subtotal:</i>                          | <u>5</u>               | <u>2</u>          | <u>3</u>          | <u>3</u>           | <u>46</u>         | <u>59</u>     |
| <b>Total:</b>                             | <b>45</b>              | <b>18</b>         | <b>23</b>         | <b>20</b>          | <b>116</b>        | <b>222</b>    |
| <b>Percent:</b>                           | <b>20.3%</b>           | <b>8.1%</b>       | <b>10.4%</b>      | <b>9.0%</b>        | <b>52.3%</b>      | <b>100.0%</b> |

### Owner Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| <b>Younger<br/>Singles &amp; Couples</b> | .....Ownership Income Bands..... |                           |                           |                            |                           | <b>Total</b>  |
|--|----------------------------------|---------------------------|---------------------------|----------------------------|---------------------------|---------------|
|  | <i>Below<br/>30% AMI</i>         | <i>30% to<br/>60% AMI</i> | <i>60% to<br/>80% AMI</i> | <i>80% to<br/>100% AMI</i> | <i>Above<br/>100% AMI</i> |               |
| <b>Metropolitan Cities</b>               |                                  |                           |                           |                            |                           |               |
| New Power Couples                        | 0                                | 0                         | 0                         | 0                          | 7                         | 7             |
| New Bohemians                            | 1                                | 1                         | 1                         | 1                          | 13                        | 17            |
| Cosmopolitan Elite                       | 0                                | 0                         | 0                         | 0                          | 6                         | 6             |
| Downtown Couples                         | 5                                | 5                         | 3                         | 3                          | 16                        | 32            |
| Downtown Proud                           | 2                                | 2                         | 1                         | 1                          | 5                         | 11            |
| <i>Subtotal:</i>                         | <u>8</u>                         | <u>8</u>                  | <u>5</u>                  | <u>5</u>                   | <u>47</u>                 | <u>73</u>     |
| <b>Small Cities/Satellite Cities</b>     |                                  |                           |                           |                            |                           |               |
| The VIPs                                 | 3                                | 3                         | 2                         | 2                          | 24                        | 34            |
| Small-City Singles                       | 12                               | 12                        | 9                         | 8                          | 13                        | 54            |
| Twentysomethings                         | 6                                | 3                         | 2                         | 2                          | 5                         | 18            |
| Second-City Strivers                     | 5                                | 5                         | 2                         | 2                          | 3                         | 17            |
| Multi-Ethnic Singles                     | 41                               | 27                        | 11                        | 7                          | 14                        | 100           |
| <i>Subtotal:</i>                         | <u>67</u>                        | <u>50</u>                 | <u>26</u>                 | <u>21</u>                  | <u>59</u>                 | <u>223</u>    |
| <b>Metropolitan Suburbs</b>              |                                  |                           |                           |                            |                           |               |
| Fast-Track Professionals                 | 1                                | 0                         | 0                         | 0                          | 8                         | 9             |
| Suburban Achievers                       | 1                                | 1                         | 1                         | 1                          | 10                        | 14            |
| Suburban Strivers                        | 6                                | 5                         | 4                         | 3                          | 8                         | 26            |
| <i>Subtotal:</i>                         | <u>8</u>                         | <u>6</u>                  | <u>5</u>                  | <u>4</u>                   | <u>26</u>                 | <u>49</u>     |
| <b>Total:</b>                            | <b>83</b>                        | <b>64</b>                 | <b>36</b>                 | <b>30</b>                  | <b>132</b>                | <b>345</b>    |
| <b>Percent:</b>                          | <b>24.1%</b>                     | <b>18.6%</b>              | <b>10.4%</b>              | <b>8.7%</b>                | <b>38.3%</b>              | <b>100.0%</b> |

**Multi-Family Owner Households By Income Bands**  
 Annual Average Number of Households With The Potential To Move  
 To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
 Houston County, and Balance of the United States*

| .....Multi-Family Ownership Income Bands.....         |                          |                           |                           |                            |                           |               |
|---|--------------------------|---------------------------|---------------------------|----------------------------|---------------------------|---------------|
| Household Type/<br>Geographic Designation             | <i>Below<br/>30% AMI</i> | <i>30% to<br/>60% AMI</i> | <i>60% to<br/>80% AMI</i> | <i>80% to<br/>100% AMI</i> | <i>Above<br/>100% AMI</i> | Total         |
| <b>Empty Nesters<br/>&amp; Retirees</b>               |                          |                           |                           |                            |                           |               |
|   | 16                       | 12                        | 7                         | 6                          | 36                        | 77            |
| <i>Metropolitan Cities</i>                            | 1                        | 1                         | 0                         | 0                          | 11                        | 13            |
| <i>Small Cities/Satellite Cities</i>                  | 13                       | 9                         | 5                         | 4                          | 11                        | 42            |
| <i>Metropolitan Suburbs</i>                           | 2                        | 2                         | 2                         | 2                          | 9                         | 17            |
| <i>Town &amp; Country/Exurbs</i>                      | 0                        | 0                         | 0                         | 0                          | 5                         | 5             |
| <b>Traditional &amp;<br/>Non-Traditional Families</b> |                          |                           |                           |                            |                           |               |
|   | 9                        | 3                         | 3                         | 1                          | 18                        | 34            |
| <i>Metropolitan Cities</i>                            | 3                        | 1                         | 1                         | 0                          | 4                         | 9             |
| <i>Small Cities/Satellite Cities</i>                  | 5                        | 2                         | 2                         | 1                          | 8                         | 18            |
| <i>Metropolitan Suburbs</i>                           | 1                        | 0                         | 0                         | 0                          | 6                         | 7             |
| <i>Town &amp; Country/Exurbs</i>                      | 0                        | 0                         | 0                         | 0                          | 0                         | 0             |
| <b>Younger<br/>Singles &amp; Couples</b>              |                          |                           |                           |                            |                           |               |
|   | 24                       | 18                        | 11                        | 10                         | 45                        | 108           |
| <i>Metropolitan Cities</i>                            | 3                        | 3                         | 3                         | 3                          | 17                        | 29            |
| <i>Small Cities/Satellite Cities</i>                  | 19                       | 14                        | 7                         | 6                          | 19                        | 65            |
| <i>Metropolitan Suburbs</i>                           | 2                        | 1                         | 1                         | 1                          | 9                         | 14            |
| <i>Town &amp; Country/Exurbs</i>                      | 0                        | 0                         | 0                         | 0                          | 0                         | 0             |
| <b>Total:</b>   | <b>49</b>                | <b>33</b>                 | <b>21</b>                 | <b>17</b>                  | <b>99</b>                 | <b>219</b>    |
| <b>Percent:</b>                                       | <b>22.4%</b>             | <b>15.1%</b>              | <b>9.6%</b>               | <b>7.7%</b>                | <b>45.2%</b>              | <b>100.0%</b> |

**Multi-Family Owner Households By Income Bands**  
 Annual Average Number of Households With The Potential To Move  
 To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
 Houston County, and Balance of the United States*

| <b>Empty Nesters<br/>&amp; Retirees</b> | <i>.....Multi-Family Ownership Income Bands.....</i> |                           |                           |                            |                           | <b>Total</b>  |
|---|--|---------------------------|---------------------------|----------------------------|---------------------------|---------------|
|   | <i>Below<br/>30% AMI</i>                             | <i>30% to<br/>60% AMI</i> | <i>60% to<br/>80% AMI</i> | <i>80% to<br/>100% AMI</i> | <i>Above<br/>100% AMI</i> |               |
| <i>Metropolitan Cities</i>              |  |                           |                           |                            |                           |               |
| The Social Register                     | 0  | 0                         | 0                         | 0                          | 1                         | 1             |
| Urban Establishment                     | 0  | 0                         | 0                         | 0                          | 5                         | 5             |
| Multi-Ethnic Empty Nesters              | 0  | 0                         | 0                         | 0                          | 2                         | 2             |
| Cosmopolitan Couples                    | 1  | 1                         | 0                         | 0                          | 3                         | 5             |
| <i>Subtotal:</i>                        | 1  | 1                         | 0                         | 0                          | 11                        | 13            |
| <i>Small Cities/Satellite Cities</i>    |  |                           |                           |                            |                           |               |
| Second City Establishment               | 0  | 0                         | 0                         | 0                          | 1                         | 1             |
| Blue-Collar Retirees                    | 1  | 1                         | 1                         | 1                          | 2                         | 6             |
| Middle-Class Move-Downs                 | 1  | 1                         | 0                         | 0                          | 2                         | 4             |
| Hometown Seniors                        | 2  | 1                         | 1                         | 1                          | 1                         | 6             |
| Second City Seniors                     | 9  | 6                         | 3                         | 2                          | 5                         | 25            |
| <i>Subtotal:</i>                        | 13   | 9                         | 5                         | 4                          | 11                        | 42            |
| <i>Metropolitan Suburbs</i>             |  |                           |                           |                            |                           |               |
| Old Money                               | 0  | 0                         | 0                         | 0                          | 1                         | 1             |
| Mainstream Empty Nesters                | 1  | 1                         | 1                         | 1                          | 2                         | 6             |
| Middle-American Retirees                | 1  | 1                         | 1                         | 1                          | 6                         | 10            |
| <i>Subtotal:</i>                        | 2  | 2                         | 2                         | 2                          | 9                         | 17            |
| <i>Town &amp; Country/Exurbs</i>        |  |                           |                           |                            |                           |               |
| Small-Town Patriarchs                   | 0  | 0                         | 0                         | 0                          | 3                         | 3             |
| Pillars of the Community                | 0  | 0                         | 0                         | 0                          | 1                         | 1             |
| New Empty Nesters                       | 0  | 0                         | 0                         | 0                          | 1                         | 1             |
| <i>Subtotal:</i>                        | 0  | 0                         | 0                         | 0                          | 5                         | 5             |
| <b>Total:</b>                           | <b>16</b>  | <b>12</b>                 | <b>7</b>                  | <b>6</b>                   | <b>36</b>                 | <b>77</b>     |
| <b>Percent:</b>                         | <b>20.8%</b>   | <b>15.6%</b>              | <b>9.1%</b>               | <b>7.8%</b>                | <b>46.7%</b>              | <b>100.0%</b> |

**Multi-Family Owner Households By Income Bands**  
 Annual Average Number of Households With The Potential To Move  
 To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
 Houston County, and Balance of the United States*

| .....Multi-Family Ownership Income Bands.....         |                          |                           |                           |                            |                           |               |
|---|--------------------------|---------------------------|---------------------------|----------------------------|---------------------------|---------------|
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <i>Below<br/>30% AMI</i> | <i>30% to<br/>60% AMI</i> | <i>60% to<br/>80% AMI</i> | <i>80% to<br/>100% AMI</i> | <i>Above<br/>100% AMI</i> | <b>Total</b>  |
| <i>Metropolitan Cities</i>                            |                          |                           |                           |                            |                           |               |
| e-Type Families                                       | 0                        | 0                         | 0                         | 0                          | 1                         | 1             |
| Multi-Cultural Families                               | 0                        | 0                         | 0                         | 0                          | 1                         | 1             |
| Inner-City Families                                   | 2                        | 1                         | 1                         | 0                          | 1                         | 5             |
| Single-Parent Families                                | 1                        | 0                         | 0                         | 0                          | 1                         | 2             |
| <i>Subtotal:</i>                                      | <u>3</u>                 | <u>1</u>                  | <u>1</u>                  | <u>0</u>                   | <u>4</u>                  | <u>9</u>      |
| <i>Small Cities/Satellite Cities</i>                  |                          |                           |                           |                            |                           |               |
| Unibox Transferees                                    | 0                        | 0                         | 0                         | 0                          | 1                         | 1             |
| Multi-Ethnic Families                                 | 0                        | 0                         | 0                         | 0                          | 3                         | 3             |
| Uptown Families                                       | 1                        | 0                         | 0                         | 0                          | 3                         | 4             |
| In-Town Families                                      | 2                        | 1                         | 1                         | 0                          | 0                         | 4             |
| New American Strivers                                 | 2                        | 1                         | 1                         | 1                          | 1                         | 6             |
| <i>Subtotal:</i>                                      | <u>5</u>                 | <u>2</u>                  | <u>2</u>                  | <u>1</u>                   | <u>8</u>                  | <u>18</u>     |
| <i>Metropolitan Suburbs</i>                           |                          |                           |                           |                            |                           |               |
| Corporate Establishment                               | 0                        | 0                         | 0                         | 0                          | 1                         | 1             |
| Nouveau Money   | 0                        | 0                         | 0                         | 0                          | 1                         | 1             |
| Button-Down Families                                  | 0                        | 0                         | 0                         | 0                          | 1                         | 1             |
| Late-Nest Suburbanites                                | 1                        | 0                         | 0                         | 0                          | 3                         | 4             |
| <i>Subtotal:</i>                                      | <u>1</u>                 | <u>0</u>                  | <u>0</u>                  | <u>0</u>                   | <u>6</u>                  | <u>7</u>      |
| <b>Total:</b>   | <b>9</b>                 | <b>3</b>                  | <b>3</b>                  | <b>1</b>                   | <b>18</b>                 | <b>34</b>     |
| <b>Percent:</b>                                       | <b>26.5%</b>             | <b>8.8%</b>               | <b>8.8%</b>               | <b>2.9%</b>                | <b>53.0%</b>              | <b>100.0%</b> |

**Multi-Family Owner Households By Income Bands**  
 Annual Average Number of Households With The Potential To Move  
 To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
 Houston County, and Balance of the United States*

| .....Multi-Family Ownership Income Bands..... |                          |                           |                           |                            |                           |               |
|---|--------------------------|---------------------------|---------------------------|----------------------------|---------------------------|---------------|
| <b>Younger<br/>Singles &amp; Couples</b>      | <i>Below<br/>30% AMI</i> | <i>30% to<br/>60% AMI</i> | <i>60% to<br/>80% AMI</i> | <i>80% to<br/>100% AMI</i> | <i>Above<br/>100% AMI</i> | <b>Total</b>  |
| <i>Metropolitan Cities</i>                    |                          |                           |                           |                            |                           |               |
| New Power Couples                             | 0                        | 0                         | 0                         | 0                          | 2                         | 2             |
| New Bohemians                                 | 1                        | 1                         | 1                         | 1                          | 8                         | 12            |
| Cosmopolitan Elite                            | 0                        | 0                         | 0                         | 0                          | 2                         | 2             |
| Downtown Couples                              | 1                        | 1                         | 1                         | 1                          | 3                         | 7             |
| Downtown Proud                                | 1                        | 1                         | 1                         | 1                          | 2                         | 6             |
| <i>Subtotal:</i>                              | <u>3</u>                 | <u>3</u>                  | <u>3</u>                  | <u>3</u>                   | <u>17</u>                 | <u>29</u>     |
| <i>Small Cities/Satellite Cities</i>          |                          |                           |                           |                            |                           |               |
| The VIPs                                      | 1                        | 1                         | 1                         | 1                          | 10                        | 14            |
| Small-City Singles                            | 1                        | 1                         | 1                         | 1                          | 2                         | 6             |
| Twentysomethings                              | 3                        | 2                         | 1                         | 1                          | 2                         | 9             |
| Second-City Strivers                          | 2                        | 2                         | 1                         | 1                          | 1                         | 7             |
| Multi-Ethnic Singles                          | 12                       | 8                         | 3                         | 2                          | 4                         | 29            |
| <i>Subtotal:</i>                              | <u>19</u>                | <u>14</u>                 | <u>7</u>                  | <u>6</u>                   | <u>19</u>                 | <u>65</u>     |
| <i>Metropolitan Suburbs</i>                   |                          |                           |                           |                            |                           |               |
| Fast-Track Professionals                      | 1                        | 0                         | 0                         | 0                          | 5                         | 6             |
| Suburban Achievers                            | 0                        | 0                         | 0                         | 0                          | 2                         | 2             |
| Suburban Strivers                             | 1                        | 1                         | 1                         | 1                          | 2                         | 6             |
| <i>Subtotal:</i>                              | <u>2</u>                 | <u>1</u>                  | <u>1</u>                  | <u>1</u>                   | <u>9</u>                  | <u>14</u>     |
| <b>Total:</b>                                 | <b>24</b>                | <b>18</b>                 | <b>11</b>                 | <b>10</b>                  | <b>45</b>                 | <b>108</b>    |
| <b>Percent:</b>                               | <b>22.2%</b>             | <b>16.7%</b>              | <b>10.2%</b>              | <b>9.2%</b>                | <b>41.7%</b>              | <b>100.0%</b> |

### Single-Family Attached Owner Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| .....Single-Family Attached Ownership Income Bands..... |                  |                   |                   |                    |                   |               |
|---|------------------|-------------------|-------------------|--------------------|-------------------|---------------|
| Household Type/<br>Geographic Designation               | Below<br>30% AMI | 30% to<br>60% AMI | 60% to<br>80% AMI | 80% to<br>100% AMI | Above<br>100% AMI | Total         |
| <b>Empty Nesters<br/>&amp; Retirees</b>                 | <b>16</b>        | <b>11</b>         | <b>6</b>          | <b>5</b>           | <b>57</b>         | <b>95</b>     |
| <i>Metropolitan Cities</i>                              | 1                | 0                 | 0                 | 0                  | 11                | 12            |
| <i>Small Cities/Satellite Cities</i>                    | 13               | 9                 | 4                 | 3                  | 14                | 43            |
| <i>Metropolitan Suburbs</i>                             | 2                | 2                 | 2                 | 2                  | 20                | 28            |
| <i>Town &amp; Country/Exurbs</i>                        | 0                | 0                 | 0                 | 0                  | 12                | 12            |
| <b>Traditional &amp;<br/>Non-Traditional Families</b>   | <b>12</b>        | <b>4</b>          | <b>5</b>          | <b>5</b>           | <b>30</b>         | <b>56</b>     |
| <i>Metropolitan Cities</i>                              | 3                | 1                 | 1                 | 1                  | 9                 | 15            |
| <i>Small Cities/Satellite Cities</i>                    | 8                | 3                 | 4                 | 4                  | 11                | 30            |
| <i>Metropolitan Suburbs</i>                             | 1                | 0                 | 0                 | 0                  | 10                | 11            |
| <i>Town &amp; Country/Exurbs</i>                        | 0                | 0                 | 0                 | 0                  | 0                 | 0             |
| <b>Younger<br/>Singles &amp; Couples</b>                | <b>29</b>        | <b>23</b>         | <b>12</b>         | <b>10</b>          | <b>44</b>         | <b>118</b>    |
| <i>Metropolitan Cities</i>                              | 3                | 3                 | 1                 | 1                  | 16                | 24            |
| <i>Small Cities/Satellite Cities</i>                    | 24               | 18                | 10                | 8                  | 19                | 79            |
| <i>Metropolitan Suburbs</i>                             | 2                | 2                 | 1                 | 1                  | 9                 | 15            |
| <i>Town &amp; Country/Exurbs</i>                        | 0                | 0                 | 0                 | 0                  | 0                 | 0             |
| <b>Total:</b>   | <b>57</b>        | <b>38</b>         | <b>23</b>         | <b>20</b>          | <b>131</b>        | <b>269</b>    |
| <b>Percent:</b>   | <b>21.2%</b>     | <b>14.1%</b>      | <b>8.6%</b>       | <b>7.4%</b>        | <b>48.7%</b>      | <b>100.0%</b> |

### Single-Family Attached Owner Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| .....Single-Family Attached Ownership Income Bands..... |                          |                           |                           |                            |                           |               |
|---|--------------------------|---------------------------|---------------------------|----------------------------|---------------------------|---------------|
| <b>Empty Nesters<br/>&amp; Retirees</b>                 | <i>Below<br/>30% AMI</i> | <i>30% to<br/>60% AMI</i> | <i>60% to<br/>80% AMI</i> | <i>80% to<br/>100% AMI</i> | <i>Above<br/>100% AMI</i> | <b>Total</b>  |
| <i>Metropolitan Cities</i>                              |                          |                           |                           |                            |                           |               |
| The Social Register                                     | 0                        | 0                         | 0                         | 0                          | 1                         | 1             |
| Urban Establishment                                     | 0                        | 0                         | 0                         | 0                          | 4                         | 4             |
| Multi-Ethnic Empty Nesters                              | 0                        | 0                         | 0                         | 0                          | 4                         | 4             |
| Cosmopolitan Couples                                    | 1                        | 0                         | 0                         | 0                          | 2                         | 3             |
| <i>Subtotal:</i>  | 1                        | 0                         | 0                         | 0                          | 11                        | 12            |
| <i>Small Cities/Satellite Cities</i>                    |                          |                           |                           |                            |                           |               |
| Second City Establishment                               | 0                        | 0                         | 0                         | 0                          | 2                         | 2             |
| Blue-Collar Retirees                                    | 2                        | 2                         | 1                         | 1                          | 5                         | 11            |
| Middle-Class Move-Downs                                 | 1                        | 1                         | 0                         | 0                          | 2                         | 4             |
| Hometown Seniors  | 3                        | 2                         | 1                         | 1                          | 1                         | 8             |
| Second City Seniors                                     | 7                        | 4                         | 2                         | 1                          | 4                         | 18            |
| <i>Subtotal:</i>  | 13                       | 9                         | 4                         | 3                          | 14                        | 43            |
| <i>Metropolitan Suburbs</i>                             |                          |                           |                           |                            |                           |               |
| The One Percenters                                      | 0                        | 0                         | 0                         | 0                          | 1                         | 1             |
| Old Money   | 0                        | 0                         | 0                         | 0                          | 1                         | 1             |
| Affluent Empty Nesters                                  | 0                        | 0                         | 0                         | 0                          | 1                         | 1             |
| Mainstream Empty Nesters                                | 1                        | 1                         | 1                         | 1                          | 7                         | 11            |
| Middle-American Retirees                                | 1                        | 1                         | 1                         | 1                          | 10                        | 14            |
| <i>Subtotal:</i>  | 2                        | 2                         | 2                         | 2                          | 20                        | 28            |
| <i>Town &amp; Country/Exurbs</i>                        |                          |                           |                           |                            |                           |               |
| Small-Town Patriarchs                                   | 0                        | 0                         | 0                         | 0                          | 6                         | 6             |
| Pillars of the Community                                | 0                        | 0                         | 0                         | 0                          | 4                         | 4             |
| New Empty Nesters                                       | 0                        | 0                         | 0                         | 0                          | 2                         | 2             |
| <i>Subtotal:</i>  | 0                        | 0                         | 0                         | 0                          | 12                        | 12            |
| <b>Total:</b>   | <b>16</b>                | <b>11</b>                 | <b>6</b>                  | <b>5</b>                   | <b>57</b>                 | <b>95</b>     |
| <b>Percent:</b>   | <b>16.8%</b>             | <b>11.6%</b>              | <b>6.3%</b>               | <b>5.3%</b>                | <b>60.0%</b>              | <b>100.0%</b> |

### Single-Family Attached Owner Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| .....Single-Family Attached Ownership Income Bands..... |                          |                           |                           |                            |                           |               |
|---|--------------------------|---------------------------|---------------------------|----------------------------|---------------------------|---------------|
| <b>Traditional &amp;<br/>Non-Traditional Families</b>   | <i>Below<br/>30% AMI</i> | <i>30% to<br/>60% AMI</i> | <i>60% to<br/>80% AMI</i> | <i>80% to<br/>100% AMI</i> | <i>Above<br/>100% AMI</i> | <b>Total</b>  |
| <i>Metropolitan Cities</i>                              |                          |                           |                           |                            |                           |               |
| e-Type Families   | 0                        | 0                         | 0                         | 0                          | 2                         | 2             |
| Multi-Cultural Families                                 | 0                        | 0                         | 0                         | 0                          | 3                         | 3             |
| Inner-City Families                                     | 2                        | 1                         | 1                         | 1                          | 2                         | 7             |
| Single-Parent Families                                  | 1                        | 0                         | 0                         | 0                          | 2                         | 3             |
| <i>Subtotal:</i>  | <u>3</u>                 | <u>1</u>                  | <u>1</u>                  | <u>1</u>                   | <u>9</u>                  | <u>15</u>     |
| <i>Small Cities/Satellite Cities</i>                    |                          |                           |                           |                            |                           |               |
| Unibox Transferees                                      | 0                        | 0                         | 0                         | 0                          | 3                         | 3             |
| Multi-Ethnic Families                                   | 1                        | 0                         | 1                         | 1                          | 2                         | 5             |
| Uptown Families   | 1                        | 1                         | 1                         | 1                          | 3                         | 7             |
| In-Town Families  | 3                        | 1                         | 1                         | 1                          | 1                         | 7             |
| New American Strivers                                   | 3                        | 1                         | 1                         | 1                          | 2                         | 8             |
| <i>Subtotal:</i>  | <u>8</u>                 | <u>3</u>                  | <u>4</u>                  | <u>4</u>                   | <u>11</u>                 | <u>30</u>     |
| <i>Metropolitan Suburbs</i>                             |                          |                           |                           |                            |                           |               |
| Corporate Establishment                                 | 0                        | 0                         | 0                         | 0                          | 1                         | 1             |
| Nouveau Money   | 0                        | 0                         | 0                         | 0                          | 2                         | 2             |
| Button-Down Families                                    | 0                        | 0                         | 0                         | 0                          | 2                         | 2             |
| Fiber-Optic Families                                    | 0                        | 0                         | 0                         | 0                          | 1                         | 1             |
| Late-Nest Suburbanites                                  | 1                        | 0                         | 0                         | 0                          | 4                         | 5             |
| <i>Subtotal:</i>  | <u>1</u>                 | <u>0</u>                  | <u>0</u>                  | <u>0</u>                   | <u>10</u>                 | <u>11</u>     |
| <b>Total:</b>   | <b>12</b>                | <b>4</b>                  | <b>5</b>                  | <b>5</b>                   | <b>30</b>                 | <b>56</b>     |
| <b>Percent:</b>   | <b>21.4%</b>             | <b>7.1%</b>               | <b>8.9%</b>               | <b>8.9%</b>                | <b>53.6%</b>              | <b>100.0%</b> |

### Single-Family Attached Owner Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| .....Single-Family Attached Ownership Income Bands..... |                          |                           |                           |                            |                           |               |
|---|--------------------------|---------------------------|---------------------------|----------------------------|---------------------------|---------------|
| <b>Younger<br/>Singles &amp; Couples</b>                | <i>Below<br/>30% AMI</i> | <i>30% to<br/>60% AMI</i> | <i>60% to<br/>80% AMI</i> | <i>80% to<br/>100% AMI</i> | <i>Above<br/>100% AMI</i> | <b>Total</b>  |
| <b>Metropolitan Cities</b>                              |                          |                           |                           |                            |                           |               |
| New Power Couples                                       | 0                        | 0                         | 0                         | 0                          | 2                         | 2             |
| New Bohemians   | 0                        | 0                         | 0                         | 0                          | 4                         | 4             |
| Cosmopolitan Elite                                      | 0                        | 0                         | 0                         | 0                          | 2                         | 2             |
| Downtown Couples  | 2                        | 2                         | 1                         | 1                          | 6                         | 12            |
| Downtown Proud  | 1                        | 1                         | 0                         | 0                          | 2                         | 4             |
| <i>Subtotal:</i>  | <u>3</u>                 | <u>3</u>                  | <u>1</u>                  | <u>1</u>                   | <u>16</u>                 | <u>24</u>     |
| <b>Small Cities/Satellite Cities</b>                    |                          |                           |                           |                            |                           |               |
| The VIPs  | 1                        | 1                         | 1                         | 1                          | 9                         | 13            |
| Small-City Singles                                      | 3                        | 3                         | 2                         | 2                          | 2                         | 12            |
| Twentysomethings  | 2                        | 1                         | 1                         | 1                          | 2                         | 7             |
| Second-City Strivers                                    | 2                        | 2                         | 1                         | 1                          | 1                         | 7             |
| Multi-Ethnic Singles                                    | 16                       | 11                        | 5                         | 3                          | 5                         | 40            |
| <i>Subtotal:</i>  | <u>24</u>                | <u>18</u>                 | <u>10</u>                 | <u>8</u>                   | <u>19</u>                 | <u>79</u>     |
| <b>Metropolitan Suburbs</b>                             |                          |                           |                           |                            |                           |               |
| Fast-Track Professionals                                | 0                        | 0                         | 0                         | 0                          | 3                         | 3             |
| Suburban Achievers                                      | 0                        | 0                         | 0                         | 0                          | 3                         | 3             |
| Suburban Strivers                                       | 2                        | 2                         | 1                         | 1                          | 3                         | 9             |
| <i>Subtotal:</i>  | <u>2</u>                 | <u>2</u>                  | <u>1</u>                  | <u>1</u>                   | <u>9</u>                  | <u>15</u>     |
| <b>Total:</b>   | <b>29</b>                | <b>23</b>                 | <b>12</b>                 | <b>10</b>                  | <b>44</b>                 | <b>118</b>    |
| <b>Percent:</b>   | <b>24.6%</b>             | <b>19.5%</b>              | <b>10.2%</b>              | <b>8.5%</b>                | <b>37.3%</b>              | <b>100.0%</b> |

### Single-Family Detached Owner Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| .....Single-Family Detached Ownership Income Bands..... |                          |                           |                           |                            |                           |               |
|---|--------------------------|---------------------------|---------------------------|----------------------------|---------------------------|---------------|
| Household Type/<br>Geographic Designation               | <i>Below<br/>30% AMI</i> | <i>30% to<br/>60% AMI</i> | <i>60% to<br/>80% AMI</i> | <i>80% to<br/>100% AMI</i> | <i>Above<br/>100% AMI</i> | <b>Total</b>  |
| <b>Empty Nesters<br/>&amp; Retirees</b>                 | <b>35</b>                | <b>32</b>                 | <b>23</b>                 | <b>20</b>                  | <b>192</b>                | <b>302</b>    |
| <i>Metropolitan Cities</i>                              | 0                        | 1                         | 0                         | 0                          | 12                        | 13            |
| <i>Small Cities/Satellite Cities</i>                    | 22                       | 18                        | 12                        | 9                          | 41                        | 102           |
| <i>Metropolitan Suburbs</i>                             | 8                        | 8                         | 6                         | 6                          | 72                        | 100           |
| <i>Town &amp; Country/Exurbs</i>                        | 5                        | 5                         | 5                         | 5                          | 67                        | 87            |
| <b>Traditional &amp;<br/>Non-Traditional Families</b>   | <b>24</b>                | <b>11</b>                 | <b>15</b>                 | <b>14</b>                  | <b>68</b>                 | <b>132</b>    |
| <i>Metropolitan Cities</i>                              | 4                        | 1                         | 2                         | 2                          | 11                        | 20            |
| <i>Small Cities/Satellite Cities</i>                    | 17                       | 8                         | 10                        | 9                          | 27                        | 71            |
| <i>Metropolitan Suburbs</i>                             | 3                        | 2                         | 3                         | 3                          | 30                        | 41            |
| <i>Town &amp; Country/Exurbs</i>                        | 0                        | 0                         | 0                         | 0                          | 0                         | 0             |
| <b>Younger<br/>Singles &amp; Couples</b>                | <b>30</b>                | <b>23</b>                 | <b>13</b>                 | <b>10</b>                  | <b>43</b>                 | <b>119</b>    |
| <i>Metropolitan Cities</i>                              | 2                        | 2                         | 1                         | 1                          | 14                        | 20            |
| <i>Small Cities/Satellite Cities</i>                    | 24                       | 18                        | 9                         | 7                          | 21                        | 79            |
| <i>Metropolitan Suburbs</i>                             | 4                        | 3                         | 3                         | 2                          | 8                         | 20            |
| <i>Town &amp; Country/Exurbs</i>                        | 0                        | 0                         | 0                         | 0                          | 0                         | 0             |
| <b>Total:</b>   | <b>89</b>                | <b>66</b>                 | <b>51</b>                 | <b>44</b>                  | <b>303</b>                | <b>553</b>    |
| <b>Percent:</b>   | <b>16.1%</b>             | <b>11.9%</b>              | <b>9.2%</b>               | <b>8.0%</b>                | <b>54.8%</b>              | <b>100.0%</b> |

### Single-Family Detached Owner Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| . . . . . Single-Family Detached Ownership Income Bands . . . . . |              |              |             |             |              |               |
|---|--------------|--------------|-------------|-------------|--------------|---------------|
| Empty Nesters<br>& Retirees                                       | Below        | 30% to       | 60% to      | 80% to      | Above        | Total         |
|   | 30% AMI      | 60% AMI      | 80% AMI     | 100% AMI    | 100% AMI     |               |
| <i>Metropolitan Cities</i>  |              |              |             |             |              |               |
| The Social Register   | 0            | 0            | 0           | 0           | 6            | 6             |
| Urban Establishment   | 0            | 0            | 0           | 0           | 1            | 1             |
| Multi-Ethnic Empty Nesters  | 0            | 1            | 0           | 0           | 5            | 6             |
| <i>Subtotal:</i>  | 0            | 1            | 0           | 0           | 12           | 13            |
| <i>Small Cities/Satellite Cities</i>                              |              |              |             |             |              |               |
| Second City Establishment   | 1            | 1            | 1           | 1           | 10           | 14            |
| Blue-Collar Retirees  | 6            | 6            | 5           | 4           | 20           | 41            |
| Middle-Class Move-Downs   | 1            | 1            | 1           | 1           | 3            | 7             |
| Hometown Seniors  | 8            | 6            | 3           | 2           | 4            | 23            |
| Second City Seniors   | 6            | 4            | 2           | 1           | 4            | 17            |
| <i>Subtotal:</i>  | 22           | 18           | 12          | 9           | 41           | 102           |
| <i>Metropolitan Suburbs</i>                                       |              |              |             |             |              |               |
| The One Percenters  | 0            | 0            | 0           | 0           | 8            | 8             |
| Old Money   | 0            | 0            | 0           | 0           | 6            | 6             |
| Affluent Empty Nesters  | 0            | 0            | 0           | 0           | 8            | 8             |
| Mainstream Empty Nesters  | 3            | 3            | 2           | 2           | 17           | 27            |
| Middle-American Retirees  | 5            | 5            | 4           | 4           | 33           | 51            |
| <i>Subtotal:</i>  | 8            | 8            | 6           | 6           | 72           | 100           |
| <i>Town &amp; Country/Exurbs</i>                                  |              |              |             |             |              |               |
| Small-Town Patriarchs   | 2            | 2            | 2           | 2           | 26           | 34            |
| Pillars of the Community  | 2            | 2            | 2           | 2           | 26           | 34            |
| New Empty Nesters   | 1            | 1            | 1           | 1           | 15           | 19            |
| <i>Subtotal:</i>  | 5            | 5            | 5           | 5           | 67           | 87            |
| <b>Total:</b>   | <b>35</b>    | <b>32</b>    | <b>23</b>   | <b>20</b>   | <b>192</b>   | <b>302</b>    |
| <b>Percent:</b>   | <b>11.6%</b> | <b>10.6%</b> | <b>7.6%</b> | <b>6.6%</b> | <b>63.6%</b> | <b>100.0%</b> |

### Single-Family Detached Owner Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| .....Single-Family Detached Ownership Income Bands..... |                          |                           |                           |                            |                           |               |
|---|--------------------------|---------------------------|---------------------------|----------------------------|---------------------------|---------------|
| <b>Traditional &amp;<br/>Non-Traditional Families</b>   | <i>Below<br/>30% AMI</i> | <i>30% to<br/>60% AMI</i> | <i>60% to<br/>80% AMI</i> | <i>80% to<br/>100% AMI</i> | <i>Above<br/>100% AMI</i> | <b>Total</b>  |
| <i>Metropolitan Cities</i>                              |                          |                           |                           |                            |                           |               |
| e-Type Families   | 0                        | 0                         | 0                         | 0                          | 4                         | 4             |
| Multi-Cultural Families                                 | 1                        | 0                         | 1                         | 1                          | 3                         | 6             |
| Inner-City Families                                     | 2                        | 1                         | 1                         | 1                          | 1                         | 6             |
| Single-Parent Families                                  | 1                        | 0                         | 0                         | 0                          | 3                         | 4             |
| <i>Subtotal:</i>  | <u>4</u>                 | <u>1</u>                  | <u>2</u>                  | <u>2</u>                   | <u>11</u>                 | <u>20</u>     |
| <i>Small Cities/Satellite Cities</i>                    |                          |                           |                           |                            |                           |               |
| Unibox Transferees                                      | 1                        | 1                         | 1                         | 1                          | 6                         | 10            |
| Multi-Ethnic Families                                   | 2                        | 1                         | 2                         | 2                          | 8                         | 15            |
| Uptown Families   | 3                        | 1                         | 2                         | 2                          | 9                         | 17            |
| In-Town Families  | 9                        | 4                         | 4                         | 3                          | 4                         | 24            |
| New American Strivers                                   | 2                        | 1                         | 1                         | 1                          | 0                         | 5             |
| <i>Subtotal:</i>  | <u>17</u>                | <u>8</u>                  | <u>10</u>                 | <u>9</u>                   | <u>27</u>                 | <u>71</u>     |
| <i>Metropolitan Suburbs</i>                             |                          |                           |                           |                            |                           |               |
| Corporate Establishment                                 | 0                        | 0                         | 0                         | 0                          | 7                         | 7             |
| Nouveau Money   | 0                        | 0                         | 0                         | 0                          | 5                         | 5             |
| Button-Down Families                                    | 1                        | 1                         | 1                         | 1                          | 10                        | 14            |
| Fiber-Optic Families                                    | 1                        | 0                         | 1                         | 1                          | 5                         | 8             |
| Late-Nest Suburbanites                                  | 1                        | 1                         | 1                         | 1                          | 3                         | 7             |
| <i>Subtotal:</i>  | <u>3</u>                 | <u>2</u>                  | <u>3</u>                  | <u>3</u>                   | <u>30</u>                 | <u>41</u>     |
| <b>Total:</b>   | <b>24</b>                | <b>11</b>                 | <b>15</b>                 | <b>14</b>                  | <b>68</b>                 | <b>132</b>    |
| <b>Percent:</b>   | <b>18.2%</b>             | <b>8.3%</b>               | <b>11.4%</b>              | <b>10.6%</b>               | <b>51.5%</b>              | <b>100.0%</b> |

### Single-Family Detached Owner Households By Income Bands

Annual Average Number of Households With The Potential To Move  
To The Downtown Macon Study Area Each Year Over The Next Five Years  
*Macon-Bibb County, Regional Draw Area,  
Houston County, and Balance of the United States*

| . . . . . Single-Family Detached Ownership Income Bands . . . . . |                          |                           |                           |                            |                           |               |
|---|--------------------------|---------------------------|---------------------------|----------------------------|---------------------------|---------------|
| <b>Younger<br/>Singles &amp; Couples</b>                          | <i>Below<br/>30% AMI</i> | <i>30% to<br/>60% AMI</i> | <i>60% to<br/>80% AMI</i> | <i>80% to<br/>100% AMI</i> | <i>Above<br/>100% AMI</i> | <b>Total</b>  |
| <i>Metropolitan Cities</i>  |                          |                           |                           |                            |                           |               |
| New Power Couples   | 0                        | 0                         | 0                         | 0                          | 3                         | 3             |
| New Bohemians   | 0                        | 0                         | 0                         | 0                          | 1                         | 1             |
| Cosmopolitan Elite  | 0                        | 0                         | 0                         | 0                          | 2                         | 2             |
| Downtown Couples  | 2                        | 2                         | 1                         | 1                          | 7                         | 13            |
| Downtown Proud  | 0                        | 0                         | 0                         | 0                          | 1                         | 1             |
| <i>Subtotal:</i>  | <u>2</u>                 | <u>2</u>                  | <u>1</u>                  | <u>1</u>                   | <u>14</u>                 | <u>20</u>     |
| <i>Small Cities/Satellite Cities</i>                              |                          |                           |                           |                            |                           |               |
| The VIPs  | 1                        | 1                         | 0                         | 0                          | 5                         | 7             |
| Small-City Singles  | 8                        | 8                         | 6                         | 5                          | 9                         | 36            |
| Twentysomethings  | 1                        | 0                         | 0                         | 0                          | 1                         | 2             |
| Second-City Strivers  | 1                        | 1                         | 0                         | 0                          | 1                         | 3             |
| Multi-Ethnic Singles  | 13                       | 8                         | 3                         | 2                          | 5                         | 31            |
| <i>Subtotal:</i>  | <u>24</u>                | <u>18</u>                 | <u>9</u>                  | <u>7</u>                   | <u>21</u>                 | <u>79</u>     |
| <i>Metropolitan Suburbs</i>                                       |                          |                           |                           |                            |                           |               |
| Suburban Achievers  | 1                        | 1                         | 1                         | 1                          | 5                         | 9             |
| Suburban Strivers   | 3                        | 2                         | 2                         | 1                          | 3                         | 11            |
| <i>Subtotal:</i>  | <u>4</u>                 | <u>3</u>                  | <u>3</u>                  | <u>2</u>                   | <u>8</u>                  | <u>20</u>     |
| <b>Total:</b>   | <b>30</b>                | <b>23</b>                 | <b>13</b>                 | <b>10</b>                  | <b>43</b>                 | <b>119</b>    |
| <b>Percent:</b>   | <b>25.2%</b>             | <b>19.3%</b>              | <b>10.9%</b>              | <b>8.4%</b>                | <b>36.1%</b>              | <b>100.0%</b> |

## Appendix Two Tables



**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**  
*Jones County, Georgia*

| Household Type/<br>Geographic Designation             | <i>Estimated<br/>Number</i> | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|---|-----------------------------|------------------|-------------------------------|
| <b>Empty Nesters<br/>&amp; Retirees</b>               | <b>3,965</b>                | <b>65</b>        | <b>25.0%</b>                  |
| <i>Metropolitan Cities</i>                            | 0                           | 0                | 0.0%                          |
| <i>Small Cities/Satellite Cities</i>                  | 0                           | 0                | 0.0%                          |
| <i>Metropolitan Suburbs</i>                           | 0                           | 0                | 0.0%                          |
| <i>Town &amp; Country/Exurbs</i>                      | 3,965                       | 65               | 25.0%                         |
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>4,605</b>                | <b>105</b>       | <b>40.4%</b>                  |
| <i>Metropolitan Cities</i>                            | 0                           | 0                | 0.0%                          |
| <i>Small Cities/Satellite Cities</i>                  | 0                           | 0                | 0.0%                          |
| <i>Metropolitan Suburbs</i>                           | 0                           | 0                | 0.0%                          |
| <i>Town &amp; Country/Exurbs</i>                      | 4,605                       | 105              | 40.4%                         |
| <b>Younger<br/>Singles &amp; Couples</b>              | <b>2,150</b>                | <b>90</b>        | <b>34.6%</b>                  |
| <i>Metropolitan Cities</i>                            | 0                           | 0                | 0.0%                          |
| <i>Small Cities/Satellite Cities</i>                  | 0                           | 0                | 0.0%                          |
| <i>Metropolitan Suburbs</i>                           | 0                           | 0                | 0.0%                          |
| <i>Town &amp; Country/Exurbs</i>                      | 2,150                       | 90               | 34.6%                         |
| <b>Total:</b>   | <b>10,720</b>               | <b>260</b>       | <b>100.0%</b>                 |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**  
*Jones County, Georgia*

|   | <i>Estimated<br/>Number</i> | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|---|-----------------------------|------------------|-------------------------------|
| <b>Empty Nesters<br/>&amp; Retirees</b> | <b>3,965</b>                | <b>65</b>        | <b>25.0%</b>                  |
| <i>Metropolitan Cities</i>              |                             |                  |                               |
| The Social Register                     | 0                           | 0                | 0.0%                          |
| Urban Establishment                     | 0                           | 0                | 0.0%                          |
| Multi-Ethnic Empty Nesters              | 0                           | 0                | 0.0%                          |
| Cosmopolitan Couples                    | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                        | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Small Cities/Satellite Cities</i>    |                             |                  |                               |
| Second City Establishment               | 0                           | 0                | 0.0%                          |
| Blue-Collar Retirees                    | 0                           | 0                | 0.0%                          |
| Middle-Class Move-Downs                 | 0                           | 0                | 0.0%                          |
| Hometown Seniors                        | 0                           | 0                | 0.0%                          |
| Second City Seniors                     | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                        | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Metropolitan Suburbs</i>             |                             |                  |                               |
| The One Percenters                      | 0                           | 0                | 0.0%                          |
| Old Money                               | 0                           | 0                | 0.0%                          |
| Affluent Empty Nesters                  | 0                           | 0                | 0.0%                          |
| Suburban Establishment                  | 0                           | 0                | 0.0%                          |
| Mainstream Empty Nesters                | 0                           | 0                | 0.0%                          |
| Middle-American Retirees                | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                        | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Town &amp; Country/Exurbs</i>        |                             |                  |                               |
| Small-Town Patriarchs                   | 5                           | 0                | 0.0%                          |
| Pillars of the Community                | 25                          | 0                | 0.0%                          |
| New Empty Nesters                       | 335                         | 5                | 1.9%                          |
| Traditional Couples                     | 40                          | 0                | 0.0%                          |
| RV Retirees                             | 875                         | 10               | 3.8%                          |
| Country Couples                         | 185                         | 5                | 1.9%                          |
| Hometown Retirees                       | 370                         | 5                | 1.9%                          |
| Heartland Retirees                      | 260                         | 0                | 0.0%                          |
| Village Elders                          | 155                         | 5                | 1.9%                          |
| Small-Town Seniors                      | 445                         | 10               | 3.8%                          |
| Back Country Seniors                    | 1,270                       | 25               | 9.6%                          |
| <i>Subtotal:</i>                        | <u>3,965</u>                | <u>65</u>        | <u>25.0%</u>                  |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**  
*Jones County, Georgia*

|   | <i>Estimated<br/>Number</i> | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|---|-----------------------------|------------------|-------------------------------|
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>4,605</b>                | <b>105</b>       | <b>40.4%</b>                  |
| <i>Metropolitan Cities</i>                            |                             |                  |                               |
| e-Type Families                                       | 0                           | 0                | 0.0%                          |
| Multi-Cultural Families                               | 0                           | 0                | 0.0%                          |
| Inner-City Families                                   | 0                           | 0                | 0.0%                          |
| Single-Parent Families                                | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                                      | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Small Cities/Satellite Cities</i>                  |                             |                  |                               |
| Unibox Transferees                                    | 0                           | 0                | 0.0%                          |
| Multi-Ethnic Families                                 | 0                           | 0                | 0.0%                          |
| Uptown Families                                       | 0                           | 0                | 0.0%                          |
| In-Town Families                                      | 0                           | 0                | 0.0%                          |
| New American Strivers                                 | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                                      | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Metropolitan Suburbs</i>                           |                             |                  |                               |
| Corporate Establishment                               | 0                           | 0                | 0.0%                          |
| Nouveau Money   | 0                           | 0                | 0.0%                          |
| Button-Down Families                                  | 0                           | 0                | 0.0%                          |
| Fiber-Optic Families                                  | 0                           | 0                | 0.0%                          |
| Late-Nest Suburbanites                                | 0                           | 0                | 0.0%                          |
| Full-Nest Suburbanites                                | 0                           | 0                | 0.0%                          |
| Kids 'r' Us   | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                                      | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Town &amp; Country/Exurbs</i>                      |                             |                  |                               |
| Ex-Urban Elite  | 0                           | 0                | 0.0%                          |
| New Town Families                                     | 5                           | 0                | 0.0%                          |
| Full-Nest Exurbanites                                 | 760                         | 15               | 5.8%                          |
| Rural Families  | 1,595                       | 20               | 7.7%                          |
| Traditional Families                                  | 5                           | 0                | 0.0%                          |
| Small-Town Families                                   | 95                          | 5                | 1.9%                          |
| Four-by-Four Families                                 | 130                         | 5                | 1.9%                          |
| Rustic Families                                       | 1,980                       | 60               | 23.1%                         |
| Hometown Families                                     | 35                          | 0                | 0.0%                          |
| <i>Subtotal:</i>                                      | <u>4,605</u>                | <u>105</u>       | <u>40.4%</u>                  |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**  
*Jones County, Georgia*

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|  | <i>Estimated<br/>Number</i> | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|--|-----------------------------|------------------|-------------------------------|
| <b>Younger<br/>Singles &amp; Couples</b> | <b>2,150</b>                | <b>90</b>        | <b>34.6%</b>                  |
| <i>Metropolitan Cities</i>               |                             |                  |                               |
| New Power Couples                        | 0                           | 0                | 0.0%                          |
| New Bohemians                            | 0                           | 0                | 0.0%                          |
| Cosmopolitan Elite                       | 0                           | 0                | 0.0%                          |
| Downtown Couples                         | 0                           | 0                | 0.0%                          |
| Downtown Proud                           | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                         | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Small Cities/Satellite Cities</i>     |                             |                  |                               |
| The VIPs                                 | 0                           | 0                | 0.0%                          |
| Small-City Singles                       | 0                           | 0                | 0.0%                          |
| Twentysomethings                         | 0                           | 0                | 0.0%                          |
| Second-City Strivers                     | 0                           | 0                | 0.0%                          |
| Multi-Ethnic Singles                     | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                         | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Metropolitan Suburbs</i>              |                             |                  |                               |
| Fast-Track Professionals                 | 0                           | 0                | 0.0%                          |
| Suburban Achievers                       | 0                           | 0                | 0.0%                          |
| Suburban Strivers                        | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                         | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Town &amp; Country/Exurbs</i>         |                             |                  |                               |
| Hometown Sweethearts                     | 410                         | 5                | 1.9%                          |
| Blue-Collar Traditionalists              | 410                         | 15               | 5.8%                          |
| Rural Couples                            | 1,120                       | 55               | 21.2%                         |
| Rural Strivers                           | 210                         | 15               | 5.8%                          |
| <i>Subtotal:</i>                         | <u>2,150</u>                | <u>90</u>        | <u>34.6%</u>                  |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**  
*Monroe County, Georgia*

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| <u>Household Type/<br/>Geographic Designation</u>     | <u>Estimated<br/>Number</u> | <u>Potential</u> | <u>Share of<br/>Potential</u> |
|---|-----------------------------|------------------|-------------------------------|
| <b>Empty Nesters<br/>&amp; Retirees</b>               | <b>4,820</b>                | <b>55</b>        | <b>28.2%</b>                  |
| <i>Metropolitan Cities</i>                            | 0                           | 0                | 0.0%                          |
| <i>Small Cities/Satellite Cities</i>                  | 0                           | 0                | 0.0%                          |
| <i>Metropolitan Suburbs</i>                           | 0                           | 0                | 0.0%                          |
| <i>Town &amp; Country/Exurbs</i>                      | 4,820                       | 55               | 28.2%                         |
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>4,235</b>                | <b>70</b>        | <b>35.9%</b>                  |
| <i>Metropolitan Cities</i>                            | 0                           | 0                | 0.0%                          |
| <i>Small Cities/Satellite Cities</i>                  | 0                           | 0                | 0.0%                          |
| <i>Metropolitan Suburbs</i>                           | 0                           | 0                | 0.0%                          |
| <i>Town &amp; Country/Exurbs</i>                      | 4,235                       | 70               | 35.9%                         |
| <b>Younger<br/>Singles &amp; Couples</b>              | <b>1,990</b>                | <b>70</b>        | <b>35.9%</b>                  |
| <i>Metropolitan Cities</i>                            | 0                           | 0                | 0.0%                          |
| <i>Small Cities/Satellite Cities</i>                  | 0                           | 0                | 0.0%                          |
| <i>Metropolitan Suburbs</i>                           | 0                           | 0                | 0.0%                          |
| <i>Town &amp; Country/Exurbs</i>                      | 1,990                       | 70               | 35.9%                         |
| <b>Total:</b>   | <b>11,045</b>               | <b>195</b>       | <b>100.0%</b>                 |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**  
*Monroe County, Georgia*

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|   | <i>Estimated<br/>Number</i> | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|---|-----------------------------|------------------|-------------------------------|
| <b>Empty Nesters<br/>&amp; Retirees</b> | <b>4,820</b>                | <b>55</b>        | <b>28.2%</b>                  |
| <i>Metropolitan Cities</i>              |                             |                  |                               |
| The Social Register                     | 0                           | 0                | 0.0%                          |
| Urban Establishment                     | 0                           | 0                | 0.0%                          |
| Multi-Ethnic Empty Nesters              | 0                           | 0                | 0.0%                          |
| Cosmopolitan Couples                    | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                        | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Small Cities/Satellite Cities</i>    |                             |                  |                               |
| Second City Establishment               | 0                           | 0                | 0.0%                          |
| Blue-Collar Retirees                    | 0                           | 0                | 0.0%                          |
| Middle-Class Move-Downs                 | 0                           | 0                | 0.0%                          |
| Hometown Seniors                        | 0                           | 0                | 0.0%                          |
| Second City Seniors                     | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                        | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Metropolitan Suburbs</i>             |                             |                  |                               |
| The One Percenters                      | 0                           | 0                | 0.0%                          |
| Old Money                               | 0                           | 0                | 0.0%                          |
| Affluent Empty Nesters                  | 0                           | 0                | 0.0%                          |
| Suburban Establishment                  | 0                           | 0                | 0.0%                          |
| Mainstream Empty Nesters                | 0                           | 0                | 0.0%                          |
| Middle-American Retirees                | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                        | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Town &amp; Country/Exurbs</i>        |                             |                  |                               |
| Small-Town Patriarchs                   | 5                           | 0                | 0.0%                          |
| Pillars of the Community                | 5                           | 0                | 0.0%                          |
| New Empty Nesters                       | 1,380                       | 10               | 5.1%                          |
| Traditional Couples                     | 5                           | 0                | 0.0%                          |
| RV Retirees                             | 640                         | 5                | 2.6%                          |
| Country Couples                         | 0                           | 0                | 0.0%                          |
| Hometown Retirees                       | 480                         | 5                | 2.6%                          |
| Heartland Retirees                      | 550                         | 5                | 2.6%                          |
| Village Elders                          | 0                           | 0                | 0.0%                          |
| Small-Town Seniors                      | 0                           | 0                | 0.0%                          |
| Back Country Seniors                    | 1,755                       | 30               | 15.4%                         |
| <i>Subtotal:</i>                        | <u>4,820</u>                | <u>55</u>        | <u>28.2%</u>                  |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**  
*Monroe County, Georgia*

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|   | <i>Estimated<br/>Number</i> | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|---|-----------------------------|------------------|-------------------------------|
| <b>Traditional &amp;<br/>Non-Traditional Families</b> | <b>4,235</b>                | <b>70</b>        | <b>35.9%</b>                  |
| <i>Metropolitan Cities</i>                            |                             |                  |                               |
| e-Type Families                                       | 0                           | 0                | 0.0%                          |
| Multi-Cultural Families                               | 0                           | 0                | 0.0%                          |
| Inner-City Families                                   | 0                           | 0                | 0.0%                          |
| Single-Parent Families                                | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                                      | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Small Cities/Satellite Cities</i>                  |                             |                  |                               |
| Unibox Transferees                                    | 0                           | 0                | 0.0%                          |
| Multi-Ethnic Families                                 | 0                           | 0                | 0.0%                          |
| Uptown Families                                       | 0                           | 0                | 0.0%                          |
| In-Town Families                                      | 0                           | 0                | 0.0%                          |
| New American Strivers                                 | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                                      | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Metropolitan Suburbs</i>                           |                             |                  |                               |
| Corporate Establishment                               | 0                           | 0                | 0.0%                          |
| Nouveau Money   | 0                           | 0                | 0.0%                          |
| Button-Down Families                                  | 0                           | 0                | 0.0%                          |
| Fiber-Optic Families                                  | 0                           | 0                | 0.0%                          |
| Late-Nest Suburbanites                                | 0                           | 0                | 0.0%                          |
| Full-Nest Suburbanites                                | 0                           | 0                | 0.0%                          |
| Kids 'r' Us   | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                                      | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Town &amp; Country/Exurbs</i>                      |                             |                  |                               |
| Ex-Urban Elite  | 0                           | 0                | 0.0%                          |
| New Town Families                                     | 5                           | 0                | 0.0%                          |
| Full-Nest Exurbanites                                 | 1,455                       | 20               | 10.3%                         |
| Rural Families  | 1,020                       | 10               | 5.1%                          |
| Traditional Families                                  | 0                           | 0                | 0.0%                          |
| Small-Town Families                                   | 10                          | 0                | 0.0%                          |
| Four-by-Four Families                                 | 0                           | 0                | 0.0%                          |
| Rustic Families                                       | 1,745                       | 40               | 20.5%                         |
| Hometown Families                                     | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                                      | <u>4,235</u>                | <u>70</u>        | <u>35.9%</u>                  |

**Annual Average Number Of Households With The Potential  
To Move To Macon-Bibb County Each Year Over The Next Five Years**  
*Monroe County, Georgia*

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|  | <i>Estimated<br/>Number</i> | <i>Potential</i> | <i>Share of<br/>Potential</i> |
|--|-----------------------------|------------------|-------------------------------|
| <b>Younger<br/>Singles &amp; Couples</b> | <b>1,990</b>                | <b>70</b>        | <b>35.9%</b>                  |
| <i>Metropolitan Cities</i>               |                             |                  |                               |
| New Power Couples                        | 0                           | 0                | 0.0%                          |
| New Bohemians                            | 0                           | 0                | 0.0%                          |
| Cosmopolitan Elite                       | 0                           | 0                | 0.0%                          |
| Downtown Couples                         | 0                           | 0                | 0.0%                          |
| Downtown Proud                           | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                         | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Small Cities/Satellite Cities</i>     |                             |                  |                               |
| The VIPs                                 | 0                           | 0                | 0.0%                          |
| Small-City Singles                       | 0                           | 0                | 0.0%                          |
| Twentysomethings                         | 0                           | 0                | 0.0%                          |
| Second-City Strivers                     | 0                           | 0                | 0.0%                          |
| Multi-Ethnic Singles                     | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                         | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Metropolitan Suburbs</i>              |                             |                  |                               |
| Fast-Track Professionals                 | 0                           | 0                | 0.0%                          |
| Suburban Achievers                       | 0                           | 0                | 0.0%                          |
| Suburban Strivers                        | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                         | <u>0</u>                    | <u>0</u>         | <u>0.0%</u>                   |
| <i>Town &amp; Country/Exurbs</i>         |                             |                  |                               |
| Hometown Sweethearts                     | 5                           | 0                | 0.0%                          |
| Blue-Collar Traditionalists              | 575                         | 15               | 7.7%                          |
| Rural Couples                            | 1,410                       | 55               | 28.2%                         |
| Rural Strivers                           | 0                           | 0                | 0.0%                          |
| <i>Subtotal:</i>                         | <u>1,990</u>                | <u>70</u>        | <u>35.9%</u>                  |



## ZIMMERMAN/VOLK ASSOCIATES, INC.

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Residential Market Analysis Across the Urban-to-Rural Transect

### 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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### RIGHTS AND STUDY OWNERSHIP—

Zimmerman/Volk Associates, Inc. retains all rights, title, and interest in the ZVA Residential Target Market Methodology™ and the individual target market descriptions contained within this study. The specific findings of the analysis are the property of the client and can be distributed at the client's discretion.

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# TARGET MARKET DESCRIPTIONS

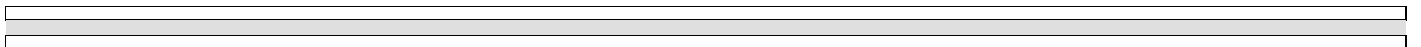
— Appendix Three —

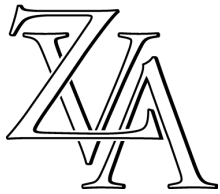
## An Update of the Analysis of Residential Market Potential

The Downtown Macon Study Area  
Macon-Bibb County, Georgia

February, 2025

Conducted by  
ZIMMERMAN/VOLK ASSOCIATES, INC.  
P.O. Box 4907  
Clinton, New Jersey 08809





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## TARGET MARKET DESCRIPTIONS

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The following target market lifestyle and values profiles have been developed by Zimmerman/Volk Associates, Inc., based on United States Bureau of Census data, the Claritas, Inc. PRIZM PREMIER household cluster segmentation, and Zimmerman/Volk Associates' lifestyle and housing correlation methodology. The target market lifestyle and values profiles have been devised for use by design, marketing, and merchandising professionals in perfecting the position of newly-created housing within the marketplace.





EMPTY NESTERS & RETIREES

– *Metropolitan Cities* –



THE SOCIAL REGISTER

---

*Configuration:* Empty-nest couples.

Typical household size—2 persons.

Predominant age range of adults—55 to 74.

*Characteristics:* 2024 national median household income: \$123,900.

2024 national median home value (for the more than three-quarters who own):  
\$767,200.

59% are college educated; 23% have advanced degrees.

An estimated 15% are retired; those still working are CEOs and high-ranking individuals in management, business and finance, and the legal profession.

*Housing characteristics:* Exclusive urban neighborhoods, downtowns.

Elegant mansions on small, manicured lots; townhouses (the city version);  
apartments and condominiums (the mid- to high-rise version).

80% have lived in their current dwelling for more than 10 years.

*Consumption patterns:* Drives a Mercedes S-Class hybrid.

Shops at Nordstrom.

Contributes to PBS.

Reads *The Atlantic*.

Does not miss The Kennedy Center Honors.

Dines at The Capital Grille.

*Icons:* The red Cartier box; California whites in the undercounter wine cooler.



“Luxury must be comfortable, otherwise it is not luxury.”

— Coco Chanel



URBAN ESTABLISHMENT

---

*Configuration:* Singles and couples.

Average household size—1 or 2 persons.

Predominant age range of adults— 45 to 64.

*Characteristics:* 2024 national median household income: \$109,100.

2024 national median home value (for the nearly one-third who own): \$951,100.

Above average technology use.

74% are college-educated; 18% have advanced degrees. Single-income households.

White 57%, Latino 17%, Asian 16%, African American 8%.

More than 90% are still working; many work in arts and entertainment industries and the media, and upper management in business.

*Housing characteristics:* Diverse urban neighborhoods.

Nearly half of the housing stock was built pre-1960.

Condominiums and apartments; rowhouses and townhouses; and bungalows and other urban houses.

*Consumption patterns:* Shops at Bloomingdale's.

Visits museums.

Reads *The New Yorker*.

Owns an Audi.

Snacks on brie cheese.

*Icons:* Theater subscription; Senior transit pass.



“Culture is the habit of being pleased with the best and knowing why.”

– Henry Van Dyke



MULTI-ETHNIC EMPTY NESTERS

---

*Configuration:* Predominantly married couples; a few with a teen-ager or an older child at home.

Average household size—2 to 4 persons.

Predominant age range of adults—45 to 74.

*Characteristics:* 2024 national median household income: \$75,500.

2024 national median housing value (for the nearly two-thirds who own): \$449,300.

White 45%, Latino 28%, African American 16%, Asian 12%.

30% are college graduates; 10% have advanced degrees.

A quarter are dual-income households.

More than three-quarters are still working, in offices, as well as sales-related jobs; managers or supervisors in business and finance.

*Housing characteristics:* Postwar detached or attached housing stock.

Urban houses, rowhouses, and condominiums.

57% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Shops at IKEA.

Buys weekly lottery ticket.

Owens a Hyundai.

Watches *Telemundo*.

Knows the best local taqueria.

*Icons:* Costco membership; Well-worn futbol jersey.



“There is communion of more than our bodies when bread is broken and wine drunk.”

– M.F.K. Fisher



COSMOPOLITAN COUPLES

---

*Configuration:* Middle-aged to older singles and couples.  
 Average household size—1 or 2 persons.  
 Predominant age range of adults—45 to 64; 25% are over 65.

*Characteristics:* 2024 national median household income: \$67,800.  
 2024 national median housing value (for the nearly one-quarter who own): \$686,000.  
 Above average technology use.  
 Almost half are college-educated; 19% have advanced degrees.  
 White 49%, Latino 20%; African American 17%; Asian 13%.  
 30% are retired. Those who are working are employed primarily behind a desk. Some are part-timers in health care support jobs and food service industry jobs.

*Housing characteristics:* Ethnically diverse in-town neighborhoods.  
 Nearly 30 percent of the housing stock was built pre-1940.  
 Urban houses, rowhouses, and condominiums.

*Consumption patterns:* Shops at the neighborhood market.  
 Uses a laundry service.  
 Reads *Popular Photography*.  
 Owns a Toyota.  
 Snacks on Entenmann's.

*Icons:* The Seamless app; Name brand everything.



“Ah, but a man's reach should exceed his grasp,  
 Or what's a heaven for?”

– Robert Browning





EMPTY NESTERS & RETIREES

– *Small Cities/Satellite Cities* –



SECOND CITY ESTABLISHMENT

---

*Configuration:* Empty-nest married couples.

Average household size—2 persons.

Predominant age range of adults—55 to 74.

*Characteristics:* 2024 national median household income: \$96,200.

2024 national median home value (for the more than 80 percent who own):  
\$411,300.

50% college graduates; 16% have advanced degrees.

Nearly two-thirds are retired; if not retired, single-income households.

*Housing characteristics:* Outer-ring suburbs of smaller cities.

Over 43% of all dwelling units have been constructed since 1980.

New single-family houses, relatively-new townhouses, and garden apartments or condominiums.

More than 73% have lived in their current dwelling for more than 10 years.

*Consumption patterns:* Shops at Stein Mart.

Drives a Lincoln.

Reads *Birding*.

Watches MSNBC.

Takes an annual European vacation.

*Icons:* Pin-riddled world map; Rimowa luggage.



“I travel not to go anywhere, but to go.”

– Robert Louis Stevenson



BLUE-COLLAR RETIREES

---

*Configuration:* Primarily singles, some married couples.

Average household size—1 person.

Predominant age range of adults—55 to 74.

*Characteristics:* 2024 national median household income: \$58,200.

2024 national median home value (for the two-thirds who own): \$192,200.

Over 54% attended or graduated from college.

Two-thirds are retired; those still working are retail clerks or office workers.

No computer; one mobile phone.

*Housing characteristics:* Older suburbs of small to mid-size cities.

Over 61% live in dwellings built between 1950 and 1980.

Detached houses and townhouses.

Just over 55% have lived in their current dwelling for more than 10 years.

*Consumption patterns:* Orders from Lands End catalogue.

Shops at Chico's.

Still owns the Olds.

Watches The Hallmark Channel.

Eats at Bob Evans.

*Icons:* Well-used workbench; 24-hour news.



“And love can come to everyone,

The best things in life are free.”

– Buddy De Sylva



MIDDLE-CLASS MOVE-DOWNS

---

*Configuration:* Older married couples and widows/widowers.

Average household size—1 to 2 persons.

Predominant age range of adults— 65 and older.

*Characteristics:* 2024 national median household income: \$56,100.

2024 national median home value (for the 71 percent who own): \$243,200.

12% have advanced degrees; nearly 54% have attended or graduated from college.

84% are retired.

Rarely uses new technology.

*Housing characteristics:* Newer suburbs for retirement

Just over two-thirds live in post-1970s construction.

Well-kept bungalows, ranch houses, and older townhouses.

64% have lived in their current dwelling for more than 10 years.

*Consumption patterns:* Shops at T.J. Maxx.

Sews from patterns.

Reads *AARP Magazine*.

Watches Turner Classic Movies.

Still drives the Buick.

*Icons:* Quilting; coupon organizer.



“You will be safest in the middle.”

– Ovid



HOMETOWN SENIORS

---

*Configuration:* Singles, widows and widowers, and couples.

Average household size—1 or 2 persons.

Predominant age ranges—65 and older.

*Characteristics:* 2024 national median household income: \$39,900.

2024 national median home value (for the more than half who own): \$129,100.

Approximately 37% have high-school diplomas; 45% have some college.

More than 72% are retired.

Below average technology use.

*Housing characteristics:* Older suburbs of mid-size cities.

Over 41% live in dwellings built before 1960.

Small detached houses, townhouses.

Nearly 71% have lived in their current dwelling for more than 10 years.

*Consumption patterns:* Shops at Big Lots.

Drives a Kia.

Reads *Christianity Today*.

Watches *WGN America*.

Eats at Golden Corral.

*Icons:* Night out at a fast-casual restaurant; anniversary trip to the Bahamas.



“Wrinkles should merely indicate where the smiles have been.”

– Mark Twain



SECOND CITY SENIORS

---

*Configuration:* Mostly singles (widowed/divorced), a few couples.

Average household size—1 person.

Predominant age range of adults—55 to 74.

*Characteristics:* 2024 national median household income: \$35,800.

2024 national median housing value (for the more than one-quarter who own):  
\$188,100.

Conversations on a park bench rather than on a smart phone.

44 percent attended some high school or have high-school diplomas; 13% have college diplomas and only 7% have advanced degrees.

70% are now retired; those still working hold low-level office jobs.

*Housing characteristics:* First-ring suburbs of small cities.

25% live in dwellings built before 1950.

Pre-war and mid-century low- and mid-rise apartment buildings.

*Consumption patterns:* Shops at Family Dollar.

Plays bingo.

Reads *TV Guide*.

Watches *Wheel of Fortune*.

Eats at Church's Chicken.

*Icons:* Casinos; rocking chairs.



“Where’s the remote?”

– Internet meme





EMPTY NESTERS & RETIREES

– *Metropolitan Suburbs* –



THE ONE PERCENTERS

---

*Configuration:* Primarily married couples; some singles (divorced/widowed.)

Average household size—1 or 2 persons.

Predominant age range of adults—55 to 74.

*Characteristics:* 2024 national median household income: \$154,500.

2024 national median housing value (for the nearly 90% who own): \$680,100.

Financial news-related push notifications.

Well educated—over 70% are college graduates; 32% have advanced degrees.

Half are in the upper tiers of management, business or finance. One quarter are top executives. Only 17% have retired.

*Housing characteristics:* Mansions in the most affluent suburbs; high-value condominiums in the city.

42% of the housing units were built post-1980.

For those who rent, typically large expensive apartments.

Single-family detached houses.

Over 73% have lived in their dwellings for 10 years or more.

*Consumption patterns:* Shops at Nordstrom.

Attends classical concerts.

Reads *The Wall Street Journal*.

Watches Bloomberg Television.

Stays at Hilton hotels.

*Icons:* His and Hers BMWs; European ski vacations.



“Wealth is like sea water; the more we drink, the thirstier we become.”

– Arthur Schopenhauer



## OLD MONEY

---

*Configuration:* Empty-nest couples; children away at boarding school or college.

Average household size—2 persons.

Predominant age range of adults—65 and older.

*Characteristics:* 2024 national median household income: \$143,600.

2024 national median housing value (for the nearly 90% who own): \$774,300.

Spare time to explore new technology.

High levels of education; 75% with college degrees and 34% with graduate degrees.

57% have retired; those still working are judges; medical specialists; chief executive officers. Upper crust, wealthy American families.

*Housing characteristics:* Older, exclusive metropolitan suburbs.

Over 62% of the housing stock was built pre-1980.

Estate houses in high-prestige neighborhoods, townhouses in the city, urban *pieds-à-terre*.

Just under 80% of these households have lived in their dwelling for more than 10 years.

*Consumption patterns:* Shops at J. Press.

Attends the opera.

Owens classic show cars, but drives a Lexus.

Watches *PBS NewsHour*.

Eats at Ruth's Chris Steakhouse.

*Icons:* Threadbare Oriental carpets; chipped Waterford crystal.



“They [the very rich] are different from you and me.”

– F. Scott Fitzgerald



AFFLUENT EMPTY NESTERS

---

*Configuration:* Empty-nest couples, very few with children still living at home.

Average household size—2 persons.

Predominant age range of adults—55 to 74.

*Characteristics:* 2024 national median household income: \$168,400.

2024 national median housing value (for the nearly 90% who own): \$796,200.

Two-thirds graduated from college; a quarter hold advanced degrees.

Prefers travel & activities to technology.

More than half are retired, but have significant financial resources. Those employed are small-business owners; corporate officers; sales directors.

*Housing characteristics:* Older suburbs; likely to move to or near downtown or an urban neighborhood when last child has left home.

Half of the housing stock was built between 1960 and 1990.

Single-family detached houses; high percentage of second/vacation homes.

Nearly 73% have lived in their dwellings for more than 10 years.

*Consumption patterns:* Shops at Talbots.

Drives a Cadillac.

Belongs to a country club.

Reads *Architectural Digest*.

Watches The Golf Channel.

Owens a vacation home.

*Icons:* His and Hers Golf Shoes; Columbia Valley reds.



“We made our money the old-fashioned way; we earned it.”

– Variation on Advertisement



SUBURBAN ESTABLISHMENT

---

*Configuration:* Mostly older couples.  
Average household size—2 persons.  
Predominant age range of adults—55 to 74.

*Characteristics:* 2024 national median household income: \$104,800.  
2024 national median housing value (for the 84% who own): \$363,200.  
Over 54 percent hold college degrees; 18% have attended graduate school.  
39% are retired. Those still working are professionals, mid-to upper-level management, and business and financial experts.

*Housing characteristics:* Established suburbs surrounding smaller cities.  
Single-family neighborhoods built primarily in the 1970s and 1980s.  
Mainly single-family detached houses, some townhouses, very few apartments or condominiums.  
Like other older suburban couples, long-time homeowners; nearly 72% have lived in their dwellings for more than 10 years.

*Consumption patterns:* Shops at Whole Foods.  
Depends on an older Volvo.  
Reads *Barron's*.  
Does not miss the Tour de France.  
Eats at Boston Market.

*Icons:* Blue-chip stock portfolio; cruise line loyalty club.



“Just enjoy your ice cream while it’s on your plate.”

– Thornton Wilder



MAINSTREAM EMPTY NESTERS

---

*Configuration:* Dual-income married couples.  
Average household size—2 persons.  
Predominant age range of adults—45 to 74.

*Characteristics:* 2024 national median household income: \$77,100.  
2024 national median housing value (for the two-thirds who own): \$253,200.  
Wish their kids would take their stuff. Follow their children on social media.  
40% are college-educated; 10% have advanced degrees.  
20% are retired; those still working are managers or superiors in business and finance professions, computer or technology related jobs.

*Housing characteristics:* Close-in suburbs.  
Detached residences in small postwar suburban detached developments.  
Over 45% have lived in their current dwelling for over 10 years.  
Some live in '70s era apartment properties.

*Consumption patterns:* Shops at Dillard's.  
Enjoys karaoke.  
Reads *Sunset*.  
Watches college sports.  
Eats at Logan's Roadhouse.

*Icons:* Remodeling to-do list; college football jersey.



“The home should be the treasure chest of living”

– Le Corbusier



MIDDLE-AMERICAN RETIREES

---

*Configuration:* Empty-nest couples, few children still at home.

Average household size—2 persons.

Predominant age range of adults—55 to 74.

*Characteristics:* 2024 national median household income: \$75,200.

2024 national median housing value (for the nearly 70 percent who own): \$280,800.

Just over 37% are college graduates; 22% have attended college, but not graduated.

40% are retired. Those still working are employed in a variety of professions, ranging from teachers, bank employees to middle management and sales positions.

*Housing characteristics:* Older inner-ring suburbs. '50s, '60s, and '70s construction.

Renters live in suburban mid-sized apartment complexes.

Owners live in townhouses and duplexes.

Just over 62% have lived in their dwellings for more than 10 years.

*Consumption patterns:* Drives a Kia.

Belongs to a union.

Reads *Popular Woodworking*.

Watches the Home Shopping Network.

Eats at Longhorn Steakhouse.

*Icons:* Home workshop; AARP card.



“If you want something done well, do it yourself.”

– Napoleon Bonaparte





EMPTY NESTERS & RETIREES

*– Town & Country/Exurbs –*



SMALL-TOWN PATRIARCHS

---

*Configuration:* Empty-nest couples.

Average household size—2 persons.

Predominant age range of adults—55 to 74.

*Characteristics:* 2024 national median household income: \$120,100.

2024 national median housing value (for the nearly 88% who own): \$492,600.

54% have college degrees; 24% have advanced degrees.

57% are retired; those still working are small-town lawyers, doctors, bankers and small-business owners.

*Housing characteristics:* Large single-family house owners on the best street in town. The leading citizens of small-town communities.

About half still live in their updated older houses which were bought after 1970.

*Consumption patterns:* Orders from Travelsmith.

Drives a Lexus.

Contributes to NPR.

Reads *The Economist*.

Never misses *The Masters*.

Owens a timeshare.

*Icons:* On-line brokerage account; Framed advanced degrees.



“The life of the wealthy is one long Sunday.”

– Anton Chekhov



PILLARS OF THE COMMUNITY

---

*Configuration:* A few still have an adult child at home.

Average household size—2 to 4 persons.

Predominant age range of adults—45 to 64.

*Characteristics:* 2024 national median household income: \$104,400.

2024 national median housing value (for the over 86% who own): \$336,700.

42% are college graduates; 11% have advanced degrees.

A third are dual-income households. Many occupy important positions in local businesses and the educational and protective governmental services.

*Housing characteristics:* Suburban houses in a small-town setting.

Nearly half bought single family houses built after 1990.

61% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Shops at Dick's Sporting Goods.

Owns a GMC.

Reads *Boating*.

Follows NASCAR.

Eats at Panera Bread.

*Icons:* Bass boat; vintage Chevy Stepside.



“This is a small town, so everyone talks.

Ironic, isn't it—so few people, so many opinions?”

– Katarina Bivald



NEW EMPTY NESTERS

---

*Configuration:* Primarily empty-nest couples.

Average household size—2 persons.

Predominant age range of adults—55 to 74.

*Characteristics:* 2024 national median household income: \$109,300.

2024 national median housing value (for the more than 85% who own): \$492,500.

Ready to trade in the big house but can't find a buyer. Can't keep up with the kids on social media.

More than half have college degrees; 17% have advanced degrees.

About half are retired; a high percentage of those working are CEOs and upper managers in business and finance.

*Housing characteristics:* 68 percent live in apartments or townhouses built post-1970.

64% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Orders from L.L. Bean.

Vacations by motor home.

Reads *Outdoor Life*.

Never misses the Kentucky Derby.

Eats at Cracker Barrel.

*Icons:* Gun dog; Maine hunting shoes.



“I do hunt and I do fish, and I don't apologize to anybody for hunting and fishing.”

– Norman Schwarzkopf



TRADITIONAL COUPLES

---

*Configuration:* Older couples.

Average household size—2 persons.

Predominant age range of adults—55 to 74.

*Characteristics:* 2024 national median household income: \$106,200.

2024 national median housing value (for the nearly 90% who own): \$438,600.

Smart phone still has the same apps and settings their kids set up for them.

A third have college degrees; a quarter have advanced degrees.

Two-thirds are retired; the rest are lawyers, local business owners and managers who are nearing retirement in their professions.

*Housing characteristics:* Detached houses in small towns.

More than one-third of them bought between 1990-2009.

62% have lived in their current dwelling for over 10 years.

Many have a vacation/weekend house.

*Consumption patterns:* Local country club members.

Reads *Traditional Home*.

Owens a Lincoln.

Watches the *Golf Channel*.

Eats at Bonefish Grill.

*Icons:* Matching golf bags; “their booth” at the breakfast place.



“Grow old along with me!

The best is yet to be.”

– Robert Browning



RV RETIREES

---

*Configuration:* Most are empty nest couples.

Average household size—2 persons.

Predominant age range of adults—55 to 74.

*Characteristics:* 2024 national median household income: \$87,900.

2024 national median housing value (for the 85% who own): \$261,300.

Prefer travel to technology.

34% have college degrees; 8% have advanced degrees.

Half are retired; those still working range from maintenance workers to educators, local business owners and professionals.

*Housing characteristics:* Older single-family houses with the mortgage paid off.

14 percent live in pre-war farmhouses.

Two-thirds have lived in their current dwelling for over 10 years.

*Consumption patterns:* Shops at Bass Pro Shops.

Owens a GMC.

Owens a farmette.

Reads *The American Legion Magazine*.

Watches *The Sportsman's Channel*.

Eats at Hardee's.

*Icons:* Winnebago; Cracker Barrel rocking chair.



“To travel hopefully is a better thing than to arrive.”

– Robert Louis Stevenson



COUNTRY COUPLES

---

*Configuration:* Mostly empty-nest couples, and some with older children at home.

Average household size—2 persons.

Predominant age range of adults—55 to 74.

*Characteristics:* 2024 national median household income: \$76,900.

2024 national median housing value (for the more than three-quarters who own):  
\$260,400.

37% have college degrees; another 10% also have advanced degrees.

43% are retired; those still working are unionized on the assembly line, on the construction crew, or working in clerical jobs.

*Housing characteristics:* Long-time residents of older stick or brick detached and townhome developments.

58% have lived in their dwelling for over 10 years.

*Consumption patterns:* Shops at Hobby Lobby.

Belongs to a veterans club.

Owens a Dodge RAM.

Watches *The Hallmark Channel*.

Eats at Cracker Barrel.

*Icons:* Signed major league jersey; coin collection.



“If you wish to get rich, save what you get.”

– Brigham Young



HOMETOWN RETIREES

---

*Configuration:* Two-thirds are married couples, and one-third are widowed or divorced singles.

Average household size—1 or 2 persons

Predominant age range of adults—55 to 74.

*Characteristics:* 2024 national median household income: \$68,500.

2024 national median housing value (for the more than 83 percent who own):  
\$196,100.

51% attended college; only 30% finished.

More than half were born and raised in the same town. One of the least likely households to use new technology; many have never owned a computer.

56% are retired; Used to driving all over town to construction and maintenance jobs.

*Housing characteristics:* Rural environments.

'90s and '00s developments surrounding old town centers.

About 80% own detached houses, be it two-story, bi-level, ranch, or mobile home.

62% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Drives a used Oldsmobile.

Shops at Dollar General.

Reads *Deer & Deer Hunting*.

Watches *The Weather Channel*.

Eat at Bojangle's.

*Icons:* Well-used vice-grips; needlepoint.



“His first, best country ever is, at home.”

– Oliver Goldsmith



HEARTLAND RETIREES

---

*Configuration:* Singles and couples.

Average household size—1 or 2 persons

Predominant age range of adults—65 and older.

*Characteristics:* 2024 national median household income: \$67,000.

2024 national median housing value (for the more than 83% who own): \$245,300.

Dislike people fiddling on smartphones all the time: “That’s for the coastal elites.”

35% have high school diplomas; 33% have college degrees.

85% are retired.

*Housing characteristics:* Two-thirds live in single-family detached houses built post-1970.

Over 80% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Orders from JC Penney catalogue.

Owns a working farm.

Reads *VFW*.

Never misses the Thanksgiving Day Parade.

Eats at Applebee's.

*Icons:* The pop-up camper; bib overalls.



“The farmer has to be an optimist or he wouldn’t still be a farmer.”

– Will Rogers



VILLAGE ELDERS

---

*Configuration:* Primarily single-person households; many of them widowers.

Average household size—1 person.

Predominant age range of adults—65 and over.

*Characteristics:* 2024 national median household income: \$53,200.

2024 national median housing value (for the 70% who own): \$216,300.

Many have never owned a computer.

A quarter have graduated college; 34% have graduated high school.

86% are retired.

*Housing characteristics:* Just under 58% live in modest detached houses. Some rent apartments in town.

The majority bought between 1970-2010.

56% lived in their current dwelling for over 10 years.

*Consumption patterns:* Still drives the old Buick.

Belongs to a Veteran's Club.

Reads *Grit*.

Watches *NBC Nightly News*.

Eats at Shoney's.

*Icons:* The trusty Buick; the corner booth at Shoney's.



“Maybe it's a symptom of a small town,  
but for some, even after graduation.  
high school never really ends.”

– Matt Abrams



SMALL-TOWN SENIORS

---

*Configuration:* 56% single, half of whom are separated/divorced/widows/widowers.

Average household size—1 person.

Predominant age range of adults—55 to 74.

*Characteristics:* 2024 national median household income: \$51,700.

2024 national median housing value (for the nearly two-thirds who own): \$171,000.

Below average technology use.

22% didn't finish college; 28% graduated, and 7% have advanced degrees.

59% are retired; and the rest occupy sales, office and clerical positions.

*Housing characteristics:* Single-family detached houses; small rental apartments.

A large portion bought '70s era construction.

46% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Shops at Kmart.

Uses a prepaid calling card.

Listens to Golden Oldies.

Watches the *Home Shopping Network*.

Eats at Golden Corral.

*Icons:* Canasta; scrapbooking.



“If I'd known I was going to live this long,  
I'd have taken better care of myself.”

– Eubie Blake



BACK COUNTRY SENIORS

---

*Configuration:* Almost half are single-person households.  
Average household size—1 or 2 persons.  
Predominant age range of adults—55 and over.

*Characteristics:* 2024 national median household income: \$48,200.  
2024 national median housing value (for the three-quarters who own): \$148,300.  
The only screen they'll look at is the TV.  
39% have high school diplomas; 21% did not finish college, and 25% graduated.  
70% are retired; those working have agricultural, construction and maintenance related jobs.

*Housing characteristics:* Small farming communities.  
A few own old farmhouses; most need fixing-up.  
Older single-family houses.  
Most own their ranch houses, ramblers or mobile homes.  
57% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Drives a GMC pickup.  
Never misses the National Finals Rodeo.  
Shops at Dollar General.  
Listens to Christian radio.  
Eats at Hardee's.

*Icons:* John Deere gimme hats; kitchen canning equipment.



“Some folks rail against other folks,  
because other folks have what some folks would be glad of.”

– Henry Fielding





TRADITIONAL & NON-TRADITIONAL FAMILIES

– *Metropolitan Cities* –



E-TYPE FAMILIES

---

*Configuration:* Two-thirds are married couples with children.

Average household size—3 or 4 persons.

Predominant age range of adults—25 to 54.

*Characteristics:* 2024 national median household income: \$135,900.

2024 national median housing value (for the 70% who own): \$727,300.

Part of the tech-savvy knowledge economy.

Highly educated: 61% graduated from college, a quarter have advanced degrees.

Multi-ethnic, with significant numbers of Asians and Latinos. Half of the households are dual-income. 13% use public transportation.

High-living, high-energy city-dwellers. Frequent home re-modelers.

Jobs require significant networking resources; e-Businesses, information technologies. Top executives, financial analysts; planning and design firm employees.

*Housing Characteristics:* Trendy detached and multi-family housing in upscale urban neighborhoods, often near universities. 13% live in post-2000 construction.

Older classic apartment buildings that have at least been updated post-1985.

*Consumption Patterns:* Shops at Bloomingdale's

Owens a Tesla Model S.

Reads NYTimes on a smart phone.

Uses Uber.

Snacks at Starbucks.

*Icons:* Virtual Private Network on every device; Blockchain.



“Innovation distinguishes between a leader and a follower.”

– Steve Jobs



MULTI-CULTURAL FAMILIES

---

*Configuration:* Couples and singles with children.

Average household size—2 to 4 persons.

Predominant age range of adults—35 to 54.

*Characteristics:* 2024 national median household income: \$69,000.

2024 national median housing value (for the more than two-thirds who own):  
\$269,700.

Middle-income households: White 49%, Latino 26%, African American 20%.

Over 52% attended college; 7% have advanced degrees.

Mid-level positions in business, management, and finance, or have their own small businesses.

*Housing Characteristics:* Long-time residents of in-town neighborhoods.

52% have lived in their current dwelling for more than 10 years.

Nearly half of all housing units were built prior to 1960.

Owners live in rowhouses and duplexes; renters in apartment buildings.

*Consumption Patterns:* Shop at H&M.

Drives a Nissan.

Reads the local paper.

Follows major league soccer.

Eats at the local pizzeria.

*Icons:* The essential DIY toolbox; Chelsea jersey.



“The dictionary is the only place that success comes before work.”

– Vince Lombardi



INNER-CITY FAMILIES

---

*Configuration:* One-third are married couples with children.

Average household size—2 to 5 persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$53,100.

2024 national median housing value (for the one-third who own): \$289,200.

A third have high school diplomas; 21% graduated from college; 4% have advanced degrees.

Half are Latino, 27% are African American, 22% are White.

Employed in healthcare, retail, sales clerks in small stores, building maintenance and housekeeping crews.

*Housing characteristics:* Downtown, in-town neighborhoods in immigrant gateway cities.

Emerging neighborhoods.

*Consumption patterns:* Shops at Footlocker.

Pre-paid metro PCS mobile.

Watches Univision.

Drives a Dodge.

Eats at Little Caesar's.

*Icons:* American Latino TV; Hip hop for kids.



“Hold fast to dreams for if dreams die,  
life is a broken-winged bird that cannot fly.”

– Langston Hughes



SINGLE-PARENT FAMILIES

---

*Configuration:* 25% are single adult households with children.

Average household size—2 to 4 persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$52,400.

2024 national median housing value (for the one-third who own): \$296,400.

30% are high school graduates; 15% have college degrees; 2% have advanced degrees.

68% are Latino, 18% are white, 14% are African American.

First-generation Americans.

Hard-working middle-class families committed to paying the bills (and saving); even the kids contribute.

*Housing Characteristics:* In-town neighborhoods in immigrant gateway cities.

Mid- and high-rise apartments.

*Consumption Patterns:* Shops at Ross Dress for Less.

Avid moviegoers.

Drives a Nissan.

Follows Mexican league soccer.

Eats at Carl's Jr.

*Icons:* USCIS case status; Liga MX warm-ups.



“Over time, grit is what separates fruitful lives from aimlessness.”

– John Ortberg





TRADITIONAL & NON-TRADITIONAL FAMILIES

*– Small Cities/Satellite Cities –*



UNIBOX TRANSFEREES

---

*Configuration:* Married couples with children, most of them school-age.

Average household size—2 to 4 persons.

Predominant age range of adults—25 to 54.

*Characteristics:* 2024 national median household income: \$104,800.

2024 national median housing value (for the 70% who own): \$396,400.

Above-average technology use.

Upper-middle-income families; both spouses work.

Well educated: 55% are college graduates, and 18% advanced degrees.

Highly mobile salespersons, professionals; architects and engineers, IT specialists and web developers, accountants, financial analysts and day traders, to business executives.

*Housing characteristics:* Older updated detached houses inside established neighborhoods in second-tier cities. Nearly a quarter live in new construction.

*Consumption patterns:* Shops at H&M.

Uses Snapchat.

Reads *Dwell*.

Watches TV on their phones.

Eats at Domino's.

Drives an Audi.

*Icons:* National Park annual pass; 529 college savings plans.



“They change their clime, not their disposition.”

– Horace



MULTI-ETHNIC FAMILIES

---

*Configuration:* Married couples with children.  
Average household size—3 or 4 persons.  
Predominant age ranges—25 to 54.

*Characteristics:* 2024 national median household income: \$81,000.  
2024 national median housing value (for the more than 60% who own): \$307,600.  
Multi-ethnic, multi-racial American families: 42% Latino, 40% White, 16% African American.  
A third graduated college; 8% have advanced degrees  
Many own their own start-up company.  
High percentage of military, former military.  
Jobs include secretaries, office staff, bank tellers, skilled construction workers, mechanics, and electricians.

*Housing characteristics:* New mid and high-rise apartments and condominiums.  
Smaller cities and suburbs. Over 35% live in post-2000 construction.

*Consumption patterns:* Shops at the commissary.  
Plays basketball and soccer.  
Owns an Acura.  
Annual trip to Mexico.  
Eats at the local deli.

*Icons:* Deployment mementos; staycations.



“It’s almost worth having been in the army  
for the joy that freedom gives you.”

– John Dos Passos



UPTOWN FAMILIES

---

*Configuration:* Couples with young school-age children.

Average household size—3 to 5 persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$76,000.

2024 national median housing value (for the more than half who own): \$282,500.

Struggling to save for the future.

37% are college grads, and 9% have advanced degrees.

Diverse: 57% White, 20% Latino, 17% African American, 6% Asian.

White-collar professionals and department heads; in tech businesses.

*Housing characteristics:* Middle-class neighborhoods in second-tier cities and suburbs.

New, upscale condos and townhouses in town, 1970s detached houses in edge neighborhoods. Only a quarter have lived in their dwelling for over 10 years.

*Consumption patterns:* Drives a Subaru.

Shops at Sam's Club.

Reads *Wired*.

Watches *MTV2*.

Eat at Joe's Crab Shack.

*Icons:* Media credenza; Frequent diner cards.



“It’s all fun and games  
until you have to wake up  
and be a parent at 6 am.”

– Greeting card



IN-TOWN FAMILIES

---

*Configuration:* Couples with infants and school-age children; a quarter are families with more than two generations present.

Typical household size—3 to 5 persons.

Predominant age range of adults—25 to 54.

*Characteristics:* 2024 national median household income: \$49,800.

2024 national median housing value (for the 57% who own): \$165,700.

32% graduated high school, 19% graduated college.

Multi-generational households.

51% Latino, 32% White, 22% African American.

Work in mostly in health care support positions. In one out of four households, another member works part-time.

*Housing characteristics:* Affordable detached houses in and around second- and third-tier cities.

About 15% rent in new construction.

More than a third have lived in their current dwelling for over 10 years.

*Consumption patterns:* Shops at Burlington.

Drives a Chevrolet.

Reads *People En Espanol*.

Watches Telemundo.

Eats at Whataburger.

*Icons:* Budget family vacations; El Tri soccer jersey.



“Every house needs a grandmother in it.”

– Louisa May Alcott



NEW AMERICAN STRIVERS

---

*Configuration:* Older married couples with children. Some grandfamilies.

Average household size—2 to 4 persons.

Predominant age range of adults—35 to 44.

*Characteristics:* 2024 national median household income: \$49,200.

2024 national median housing value (for the 25% who own): \$206,100.

32% high school graduates; 22% attended some college; 26% graduated.

Diverse and mixed-race: 40% White, 29% African American, 29% Latino.

Food service, maintenance and housekeeping, construction and landscaping, and healthcare support services; some office employment.

*Housing characteristics:* Second-tier cities, often with military presence.

Ethnic fare, shops to buy items from back home and traditional garb.

*Consumption patterns:* Shops at Uniqlo.

Owens a Dodge.

Reads *Spin*.

Watches *Oxygen*.

Eats at Krispy Kreme.

*Icons:* Latin pop, A-pop, J-pop, K-pop; poblanas, saris, kimonos and djellabas.



“The land flourished because it was fed from so many sources –  
because it was nourished by so many cultures and traditions and peoples.”

– Lyndon B. Johnson





TRADITIONAL & NON-TRADITIONAL FAMILIES

– *Metropolitan Suburbs* –



CORPORATE ESTABLISHMENT

---

*Configuration:* Older families with children in school.

Average household size—3 or 4 persons.

Predominant age range of adults—35 to 54.

*Characteristics:* 2024 national median household income: \$183,400.

2024 national median housing value (of the 85% who own): \$697,100.

Internet of Things.

Dual-income White 62%, 22% Asian, 8% Latino, 8% African American families.

73% are college-educated; 43% have undergraduate degrees, 30% have advanced degrees.

Prominent professionals and executives in business, finance, law, and communications industries.

*Housing characteristics:* 60% of tech-enhanced estates built since the '90s. 36% are in newer (post 2000) construction. Million-dollar homes.

Detached houses in wealthy enclaves, often near the country club; expensive condominiums or exclusive co-ops in the city.

39% have lived in their current dwelling for over 10 years

*Consumption patterns:* Shops at Brooks Brothers.

Reads *Investor's Business Daily*.

Plays tennis.

Watches *Saturday Night Live*.

Uses LinkedIn.

*Icons:* Acoustically-neutral audiophile multi-media room; the genuine club tie.



“Wealth is not without its advantages.”

– John Kenneth Galbraith



NOUVEAU MONEY

---

*Configuration:* Married couples with mostly older children.

Average household size—3 or 4 persons.

Predominant age range of adults—35 to 54.

*Characteristics:* 2024 national median household income: \$132,800.

2024 national median housing value (for the 80% who own): \$482,700.

Posting travels on Instagram.

67% White, 13% Asian, 10% Latino, and 8% African American dual-income households.

Big spenders with high incomes. He's a portfolio manager, she's a high school teacher.

64% have college degrees and 23% have advanced degrees.

Investment analysts; high-tech careers; successful start-ups, sold for millions.

*Housing characteristics:* Two-thirds live in new-money suburban subdivisions built after 1990.

37% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Shops at Ralph Lauren.

Owens a BMW.

Uses Yelp.

Grandes at Starbucks.

Drinks Perrier.

*Icons:* The black titanium AmEx Centurion card; outdoor kitchen.



“A sumptuous dwelling the rich man hath.”

– Mary Elizabeth Hewitt



## BUTTON-DOWN FAMILIES

---

*Configuration:* Married couples with older children.

Average household size—3 or 4 persons.

Predominant age range of adults—35 to 54.

*Characteristics:* 2024 national median household income: \$131,300.

2024 national median housing value (for the more than 83% who own): \$522,700.

Computer-savvy and career-oriented; both spouses work full-time.

62% White, 18% Latino, 10% African American, 10% Asian.

48% have college degrees; 13% have advanced degrees.

About half work in the corporate environment. Several are middle managers.

*Housing characteristics:* Summer vacation home in a walkable beach town.

Large older updated houses on small lots to new condominiums.

51% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Shops at Ethan Allen Galleries.

Belongs to a country club.

Reads *Money*.

Watches CNBC.

Owens a Mazda.

Eats at Chipotle.

*Icons:* Golf cart; Team-specific cycling gear.



“So always look for the silver lining  
And try to find the sunny side of life.”

– P.G. Wodehouse



FIBER-OPTIC FAMILIES

---

*Configuration:* Older families.

Average household size—3 or 4 persons.

Predominant age range of adults—35 to 54.

*Characteristics:* 2024 national median household income: \$102,500.

2024 national median housing value (for the nearly 90% who own): \$331,500.

Everything is in the Cloud.

Half have college degrees; 14% have advanced degrees.

Mid- to upper-level executives in tech, business, education, accounting, financial services, planning and design.

*Housing characteristics:* Detached houses in close-in suburban subdivisions.

Nearly half bought between 1990 and 2009.

40% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Shops at IKEA.

High-speed internet with mega bandwidth.

Visit CNET.com.

Owns a Jeep.

Watches the Sundance Channel.

Eats at Five Guys.

*Icons:* Fandor and Indieflix subscriptions; Organic LED television.



“Any sufficiently advanced technology  
is indistinguishable from magic.”

– Arthur C. Clarke



LATE-NEST SUBURBANITES

---

*Configuration:* Older married couples with school-age children, some away at college.

Average household size—2 to 4 persons.

Predominant age range of adults—35 to 54.

*Characteristics:* 2024 national median household income: \$94,500.

2024 national median housing value (for the 60% who own): \$444,900.

Upper-middle-income suburban families; a third are dual-income; some are minivan soccer moms. College tuition sticker shock. Everything Amazon Prime.

61% have college degrees; 22% have advanced degrees.

Officers of small corporations; sales managers; communications and technology.

*Housing characteristics:* New upscale suburban subdivisions.

Half live in older houses. Relatively high property values.

A third have lived in their current dwelling for over 10 years.

*Consumption patterns:* Owns an Infiniti.

Attends children's soccer games.

Visits Disney.com.

Watches *The Tennis Channel*.

Eats at Fuddrucker's.

*Icons:* Family YouTube channel; “My child is an honor student at . . .” bumper stickers.



“Hail wedded love, mysterious law, true source of human offspring.”

– John Milton



FULL-NEST SUBURBANITES

---

*Configuration:* Married couples with children.  
Average household size—2 to 4 persons.  
Predominant age range of adults—25 to 54.

*Characteristics:* 2024 national median household income: \$88,000.  
2024 national median housing value (for the two-thirds who own): \$407,800.  
Above-average technology use.  
54% have college degrees, 17% have advanced degrees.  
White 69%, Latino 13%, African American 10%, Asian 7%.  
Business managers, supervisors, and accountants, along with other white-collar jobs.  
Many are employed in the educational system at all levels.

*Housing characteristics:* Suburban subdivisions outside fast-growing metro areas.  
Pre-crash detached houses.  
46% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Shops at Publix.  
Owns a Volkswagen.  
Weekly Pilates class.  
Reads *Entrepreneur*.  
Watches *The Cooking Channel*.  
Eats at Romano's Macaroni Grill.

*Icons:* Babolat AeroPro Drive tennis racquets; WebMD.



“Other things may change us,  
but we start and end with the family.”

– Anthony Brandt



KIDS 'R' US

---

*Configuration:* Family households with above-average number of children.

Average household size—3 to 5 or more persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$80,400.

2024 national median housing value (for the 68% who own): \$268,700.

Weekly grocery deliveries.

Living the Middle-Class Dream. A third are dual-income, but 56% are single-income.

White 57%, Latino 21%, African American 18%, Asian 5%

36% are college-educated; 8% have advanced degrees.

10% carpool to work. Employment across all job categories.

*Housing characteristics:* Detached houses in '90s and '00s subdivisions. 20% live in new construction.

The quarter-acre lot.

*Consumption patterns:* Shops at Burlington.

Visits Walt Disney World.

Reads *Sports Illustrated*.

Watches *Nick Jr.*

Eats at Wingstop.

Owens a Hyundai.

*Icons:* Amazon Fresh; family Google Calendar.



“These are your peak earning years, my friend.

You’ve got kids to think about”

– Garth Risk Hallberg





TRADITIONAL & NON-TRADITIONAL FAMILIES

*– Town & Country/Exurbs –*



EX-URBAN ELITE

---

*Configuration:* Married couples; most with older children, a few away at college.

Average household size—2 to 4 persons.

Predominant age range of adults—45 to 64.

*Characteristics:* 2024 national median household income: \$146,200.

2024 national median housing value (nearly all own): \$527,100.

Keeps up with acquaintances online.

65% graduated college; 23% have advanced degrees.

Former residents of cities or metropolitan suburbs who have “escaped” urban stress.

Wealthy families living in private luxury.

Executives; professionals; entrepreneurs; consulting businesses.

*Housing characteristics:* “Retreat” locations—the New England coast; horse farms in Virginia and New Jersey; Monterey County, California.

Only one-third live in pre-1990 buildings.

“Estate” houses—custom if new; restored if old.

*Consumption patterns:* Shops at Pottery Barn.

Owens a Steinway baby grand.

Reads *Forbes*.

Goes skiing.

Eats at Bertucci’s.

*Icons:* E\*Trade; Rolex chronographs.



“Far from the madding crowd’s ignoble strife,

Their sober wishes never learn’d to stray;

Along the cool sequester’d vale of life

They kept the noiseless tenor of their way.”

– Thomas Gray



FULL-NEST EXURBANITES

---

*Configuration:* Older married couples with children; mostly school-age.

Average household size—3 or 4 persons.

Predominant age range of adults—35 to 54.

*Characteristics:* 2024 national median household income: \$115,400.

2024 national median housing value (for the more than 85% who own): \$425,300.

49% have college degrees; 14% have advanced degrees.

Professionals and tech-related business careers; a high proportion of executives and upper managers.

*Housing characteristics:* Cookie-cutter detached houses in exurban subdivisions.

Half live in units built post-1990.

*Consumption patterns:* Shops at Dick's Sporting Goods.

Reads *Sports Illustrated*.

Watches ESPN.

Eats at Texas Roadhouse.

Drives a Honda.

*Icons:* Her horse; his power boat.



“A piece of land not so very large, which would contain a garden,  
and near the house a spring of ever-flowing water,  
and beyond these a bit of wood.”

– Horace



NEW TOWN FAMILIES

---

*Configuration:* Young, upper middle-class families with babies or school-age children.

Average household size—3 or 4 persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$109,500.

2024 national median housing value (for the 85% who own): \$339,600.

Mobile-friendly.

Educated townfolk; typically close to outdoor recreational activities.

White 74%, African American 11%, Latino 11%, Asian 4%.

44% have college degrees; 11% have advanced degrees.

Range of employment from contractors to business executives, with a high percentage of educators.

*Housing characteristics:* Detached houses in rural townships, clustered suburban subdivisions near the town center.

Lake towns, large amounts of preserved land close by.

43% live in post-2000 construction.

*Consumption patterns:* Shops at Old Navy.

Uses Spotify.

Drives a Subaru.

Watches Nickelodeon.

Eats at Cold Stone Creamery.

*Icons:* PlayStation 5; Everything Gore-Tex.



“Welcome to the great American two-career family  
and pass the aspirin, please.”

– Anastasia Toufexis



RURAL FAMILIES

---

*Configuration:* Married couples with mainly older children.

Average household size—2 to 4 persons.

Predominant age range of adults—35 to 54.

*Characteristics:* 2024 national median household income: \$88,800.

2024 national median housing value (for the more than 80% who own): \$249,000.

Middle-class dual-income families. Prefer outdoor activities.

32% college graduates; 7% have advanced degrees.

Policemen or firefighters, truck drivers, oil riggers, lumberjacks, and craftsmen.

*Housing characteristics:* Older detached houses and townhouses usually in subdivisions around main intersections.

43% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Shops at Cabela's.

Owens a Chevrolet.

Goes hunting.

Reads *American Angler*.

Watches *The Outdoor Channel*.

Eats at Jimmy John's.

*Icons:* Sports equipment wall rack; cowboy boots.



“Sport is the bloom and glow of a perfect health.”

– Ralph Waldo Emerson



SMALL-TOWN FAMILIES

---

*Configuration:* Middle-class families with babies and younger children.

Average household size—2 to 4 persons.

Predominant age range of adults—25 to 54.

*Characteristics:* 2024 national median household income: \$86,300.

2024 national median housing value (for the more than half who own): \$325,800.

One-third are dual-income.

47% college graduates; 14% advanced degrees.

Home-improvement professionals, maintenance crews, franchise managers, auto salesmen.

*Housing characteristics:* Detached houses in and around small towns with about 35% in new construction.

Many bought pre-crash.

41% have lived at the same address for the past one to four years.

*Consumption patterns:* Shops at Bass Pro Shops.

Owens a motorcycle.

Subscribes to Disney+.

Watches the DIY Network.

Eats at Sonic.

*Icons:* Minor league baseball; *Pat the Bunny*.



“In the small town each citizen had done something  
in his own way to build the community”

– Daniel J. Boorstin



TRADITIONAL FAMILIES

---

*Configuration:* Married couples; children of all ages.

Average household size—2 to 4 persons.

Predominant age range of adults—35 to 54.

*Characteristics:* 2024 national median household income: \$84,500.

2024 national median housing value (for the more than 80% who own): \$274,700

41% have undergraduate degrees; 11% have advanced degrees.

Outdoor recreation-oriented family activities.

A third are dual-income households.

Middle-income white-collar employment; Management and professionals. Small percentage of military personnel.

*Housing characteristics:* Detached houses in small-town neighborhoods.

25% live in housing constructed after 2000.

45% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Shops at Dillard's.

Owns a timeshare.

Visits NFL.com.

Follows college sports.

Eats at Zaxby's.

*Icons:* Mountain bikes; NCAA basketball bracket family competition.



“It [tradition] cannot be inherited, and if  
you want it you must obtain it by great labor.”

– T.S. Eliot



FOUR-BY-FOUR FAMILIES

---

*Configuration:* Families with school-age children.

Average household size—3 to 5 or more persons.

Predominant age range of adults—25 to 54.

*Characteristics:* 2024 national median household income: \$80,600.

2024 national median housing value (for the 70% who own): \$267,800.

29% high school graduates; 38% college graduates; 9% advanced degrees.

White 68%, Latino 17%, African American 12%.

Middle-class technical school graduates, health-care support workers, unionized plant workers; repairman of everything from plumbing to roofs.

*Housing characteristics:* Detached and attached houses in small towns.

Half are older houses that need constant maintenance and upkeep.

*Consumption patterns:* Shops at Academy Sports + Outdoors.

Visits Disney World.

Owens a 4WD pickup.

Watches *Extra*.

Eats at Krystal.

*Icons:* His John Deere Gator; her GMC Canyon 4WD pickup.



“A happy family is but an earlier heaven.”

– George Bernard Shaw



RUSTIC FAMILIES

---

*Configuration:* Married couples with children.  
Average household size—2 to 4 persons.  
Predominant age range of adults—35 to 54.

*Characteristics:* 2024 national median household income: \$68,900.  
2024 national median housing value (for the more than three-quarters who own): \$197,400.  
Below average technology use.  
37% graduated high school; 39% have college degrees.  
Mostly single-income households.  
Construction and maintenance staff, electricians, truck drivers and delivery staff, and production and assembly workers.

*Housing characteristics:* Older townhouses, detached houses and mobile homes in the rural heartlands.  
37% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Shops at Walmart.  
Owns a horse.  
Reads *Hunting*.  
Watches *Fox News*.  
Eats at Hardee's.

*Icons:* NHRA drag races; a six-pack of Mountain Dew.



“Life ain’t always beautiful,  
but it’s a beautiful ride.”

– Gary Allen



HOMETOWN FAMILIES

---

*Configuration:* Couples with younger children. Many non-traditional families; only 37% are married.  
Average household size—2 to 4 persons.  
Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$55,400.  
2024 national median housing value (less than 25% own): \$195,300.  
Single-income families.  
White 66%, African American 16%, Latino 14%.  
31% are high school graduates; 32% college graduates.  
Employment in restaurants and the food service industry, as landscapers or building maintenance employees, retail cash register clerks, personal and childcare services and health care support workers. Some students, full- or part-time.

*Housing characteristics:* Rent older attached and detached houses in small towns.  
Most of the housing built post-1970.

*Consumption patterns:* Owns a Ford.  
Follows pro wrestling.  
Reads *National Enquirer*.  
Shops at Family Dollar.  
Eats at Domino's Pizza.

*Icons:* Diaper hamper; Swing set.



“Perhaps the greatest social service that can be rendered by anybody  
to the country and to mankind is to bring up a family.”

– George Bernard Shaw





YOUNGER SINGLES & COUPLES

– *Metropolitan Cities* –



NEW POWER COUPLES

---

*Configuration:* Mostly couples, few with children.

Typical household size—1 and 2 persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$99,800

2024 national median housing value (for the more than half who own): \$600,500

Active social lives; many unmarried couples living together. Too busy IRL.

White 67%, Latino 13%, Asian 10%, African American 9%.

63% have college degrees; 25% have advanced degrees.

High-ranking professionals mostly in management, business and finance, as well as high-end law firms, architectural firms, product and apparel design teams, marketing and public relations firms. Above average bicycle commuters.

*Housing characteristics:* Vibrant urban neighborhoods in high-growth cities.

Urban pre-war townhouses and high-rises; vintage houses on urban lots.

*Consumption patterns:* Owns a BMW.

Shops at Crate & Barrel.

Uses Uber and Lyft.

Vacations in Europe, Asia, and Africa.

Plays pickleball.

Eats at Au Bon Pain.

*Icons:* Next week's opening; European activewear



“Wine and cheese are ageless companions,  
like aspirin and aches, or June and moon,  
or good people and noble ventures.”

– M.F.K. Fisher



NEW BOHEMIANS

---

*Configuration:* Primarily singles, some couples.

Average household size—1 to 2 persons.

Predominant age range of adults—25 to 34.

*Characteristics:* 2024 national median household income: \$92,200.

2024 national median housing value (for the 20% who own): \$665,700.

Actively cultivating online connections.

White 61%, Asian 16%, Latino 13%, African American 9%.

74% graduated from college; 30% hold advanced degrees.

Tech-savvy executives, students, actors, artists, writers, boutique owners, and public-interest advocates. The social and political *avant-garde*; one-third are gay. Heart of the real “creative class;” alternative lifestyles: hippies, radical leftists, community activists.

*Housing characteristics:* In-town and downtown neighborhoods.

Funky flats in brownstones, apartment houses, and converted lofts in emerging neighborhoods. Over 16% live in new construction/renovation.

*Consumption patterns:* Owns a hybrid vehicle.

Shops at H&M.

Uses Twitter.

Goes to music concerts of all kinds.

Subscribes to Spotify.

Airline miles cards.

*Icons:* Cold brewed, fair-trade coffee, everything urban.



“Sacred cows make the tastiest hamburger.”

– Abbie Hoffman



COSMOPOLITAN ELITE

---

*Configuration:* Primarily singles and couples, few children.

Average household size—1 to 2 persons.

Predominant age range of adults—35 to 54.

*Characteristics:* 2024 national median household income: \$89,300.

2024 national median housing value (for the 60% who own): \$671,400.

47% have college degrees; 17% have advanced degrees. Diverse and successful.

White 53%, Latino 20%, Asian 15%, African American 11%.

Job types include business management and finance, accountants and educators.

*Housing characteristics:* Multi-lingual urban neighborhoods.

9% live in new construction.

45% live in single-family detached houses.

Relatively settled—78% have lived in the same dwelling for more than five years;

60% over 10 years.

*Consumption patterns:* Owns a Volvo.

Shops at Nordstrom.

Follows championship tennis.

Reads *The New York Times*.

Never misses the Oscars.

Eats at the Cheesecake Factory.

*Icons:* Eurosport on Kodi; Apple watch.



“Neighborhood is a word that has come to sound like a Valentine.”

– Jane Jacobs



DOWNTOWN COUPLES

---

*Configuration:* 26% are married couples, the rest are singles.

Average household size—1 or 2 persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$44,500.

2024 national median housing value (for the 45% who own): \$191,800.

African American 37%, White 33%, Latino 27%.

26% are college graduates; 33% are high school graduates.

14% use public transport. Twice as likely to be car-free.

Employment includes tellers, clerks, and secretaries, sales representatives and telemarketers.

*Housing characteristics:* Old buildings in ethnically-diverse urban neighborhoods.

25% live in prewar houses, townhouses and apartment buildings.

*Consumption patterns:* Owns a Kia.

Follows pro boxing.

Shops at Burlington.

Reads *Ebony*.

Watches BET.

Eats at White Castle.

*Icons:* Cricket mobile phone; Manny Pacquiao hoodie



“In this country ‘American’ means white.

Everyone else has to hyphenate.”

– Toni Morrison



DOWNTOWN PROUD

---

*Configuration:* 41% are single-person households; some married couples.

Average household size—1 or 2 persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$41,400.

2024 national median housing value (for the 15% who own): \$387,100

Social networking on Tuloko.

Latinos 33%, African Americans 31%, White 29%, Asian 9%.

29% graduated high school; 22% have college degrees; 7% have advanced degrees.

Primarily blue-collar and service jobs.

Nearly three and a half times as likely to be car-free.

*Housing characteristics:* High-density apartments or rowhouses in inner-city neighborhoods.

18% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Owns a Mitsubishi.

Shops at Foot Locker.

Goes to professional basketball games.

Watches *Telemundo*.

Eats at McDonald's.

*Icons:* Prepaid smartphone; LeBron; Beyoncé.



“Start where you are. Use what you have.

Do what you can.”

– Arthur Ashe





YOUNGER SINGLES & COUPLES

– *Small Cities/ Satellite Cities* –



THE VIPS

---

*Configuration:* Singles, sometimes with roommates; 39% are married couples.

Average household size—1 to 2 persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$87,100.

2024 national median housing value (for the 35% who own): \$443,100.

White 61%, African American 14%, Latino 14%, Asian 10%.

51% college graduates; 18% have advanced degrees.

Type-A college grads. Career- and lifestyle-oriented techies.

More than half of the married couples are working in prominent positions. Many are employed by software and IT companies, communications firms, and some are supervisors or upper managers in business and finance.

*Housing characteristics:* Downtowns of small cities; high-value close-in suburbs.

Only 21% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Owns a Volkswagen GTI.

Shops at The Limited.

Frequent movie-goers.

Reads *Rolling Stone*.

Watches *The Tonight Show*.

Eats at Panera.

*Icons:* The gold Apple Watch; The Alumni Athletic Club.



“Action is the foundational key to all success.”

– Pablo Picasso



SMALL-CITY SINGLES

---

*Configuration:* Mostly singles; a few couples.

Average household size—1 or 2 persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$49,900.

2024 national median housing value (for the more than half who own): \$151,500.

White 59%, African American 21%, Latino 17%.

35% are high school graduates, 27% are college graduates.

Sales, telemarketing and tele-representation jobs as well as personal and childcare services. Some work as secretaries, tellers or clerks.

*Housing characteristics:* Detached and attached houses in diverse second-city neighborhoods.

20% live in prewar construction.

A few still live with their parents; some still live in college dormitories.

*Consumption patterns:* Owns a Chevrolet.

Orders online.

Shops at Sam's Club.

Watches *MTV*.

Eats at Papa John's.

*Icons:* The *only* nightclub; taco Tuesdays.



“Where there is no struggle, there is no strength.”

– Oprah Winfrey



TWENTYSOMETHINGS

---

*Configuration:* 18% couples, the rest are singles.

Average household size—1 person.

Predominant age range of adults—18 to 34.

*Characteristics:* 2024 national median household income: \$43,800.

2024 national median housing value (for the few who own): \$269,500.

White 56%, African American 21%, Latino 14%, Asian 8%.

Tech-savvy content creators.

21% still in college; 47% college graduates; 16% advanced degrees.

Office workers in business and finance, as well as call center reps, secretaries, tellers and clerks; many still looking for a career.

*Housing characteristics:* Rental apartments in college towns; some still living in dorms or at home.

10% live in new construction.

Only 8% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Owns a Pontiac.

Buys designer shoes.

Follows pro basketball.

Instagram and TikTok.

Gets coffee at Starbucks.

*Icons:* Snapchat; Taylor Swift.



“But first, let me take a selfie.”

– Instagram caption



SECOND-CITY STRIVERS

---

*Configuration:* Mostly single-person households, a quarter are couples.

Average household size—1 or 2 persons.

Predominant age range of adults—18 to 44.

*Characteristics:* 2024 national median household income: \$43,700.

2024 national median housing value (for the 20% who own): \$219,000.

White 46%, African American 30%, Latino 20%.

23% some college; a third college degrees; 8% advanced degrees.

Transient blue- and white-collar workers seeking upward mobility.

*Housing characteristics:* Rental duplexes, triplexes, quadruplexes and apartments in modest close-in neighborhoods.

Only 18% live in single-family detached houses.

*Consumption patterns:* Owns a Dodge.

Pays with cash.

Frequent movie-goers.

Reads *Jet*.

Never misses the BET Awards.

Eats at Dunkin.

*Icons:* Monster.com; Fandango.



“In America, getting on in the world means getting  
out of the world we have known before.”

– Ellery Sedgwick



MULTI-ETHNIC SINGLES

---

*Configuration:* Mostly singles.

Average household size—1 person.

Predominant age range of adults—18 to 44.

*Characteristics:* 2024 national median household income: \$29,800.

2024 national median housing value (for the 20% who own): \$128,600

African-American 40%, White 35%, Latino 23%.

35% high school graduates; 21% some college; 21% college degrees.

Ethnically diverse, and often on the move.

Entry-level service jobs; 9% are students.

*Housing characteristics:* Inner-city neighborhoods of second- and third-tier cities.

Small garden apartment properties, rowhouses, duplexes and modest single-family houses.

*Consumption patterns:* Owns a Mercury.

Shops at Family Dollar.

Travels by bus.

Read *Jet*.

Watches *BET*.

Eats at Burger King.

*Icons:* Check-cashing store; Online training course.



“If in doubt, just walk until your day becomes interesting.”

– Rolf Potts





YOUNGER SINGLES & COUPLES

– *Metropolitan Suburbs* –



FAST-TRACK PROFESSIONALS

---

*Configuration:* Mostly couples; some are married.

Average household size—2 persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$85,900.

2024 national median housing value (for the 15% who own): \$438,400.

62% college degrees; 22% advanced degrees.

Highest average household technology use; often alone together.

White 53%, African-American 16%, Asian 16%, Latino 14%.

Professionals and corporate jobs, from computer and tech, such as statistician, programmer and web developer, to clerks, secretaries and tellers.

*Housing characteristics:* Well-located apartments in old and new suburbia.

40% live in new construction.

*Consumption patterns:* Owns an Infiniti.

Shops at J. Crew.

Owns an e-reader.

Reads books on-line.

Watches *Nick at Nite*.

Eats at Benihana.

*Icons:* iPad Pro, health club to dance club clothes.



“Have nothing in your homes  
that you do not know to be useful  
or believe to be beautiful.”

– William Morris



SUBURBAN ACHIEVERS

---

*Configuration:* 37% married couples. 30% unmarried couples. 33% single-person households.

Average household size—2 persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$53,300.

2024 national median housing value (for the 60% who own): \$188,200.

31% are high-school grads; 22% have some college; 32% have college degrees.

White 59%, Latino 21%, African American 18%.

Employed in sales and office jobs as secretaries, tellers and clerks, telemarketing and tele-representation staff, as well as construction/maintenance crew.

*Housing characteristics:* Apartments and townhouses in inner-ring suburbs and second cities.

48% have lived in their current dwelling for over 10 years.

*Consumption patterns:* Owns a Toyota.

Shops at Banana Republic.

Soccer games (as player and fan).

Posts on Instagram and TikTok.

Watches *South Park*.

Eats at Church's Chicken.

*Icons:* LinkedIn; soccer gear.



“The key is not to prioritize what’s on your schedule,  
but to schedule your priorities.”

– Stephen Covey



SUBURBAN STRIVERS

---

*Configuration:* Young couples; almost a third are married.

Average household size—2 persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$48,500.

2024 national median housing value (for the 40% who own): \$215,800.

Active social media users.

White 57%, African American 22%, 16% Latino.

29% graduated high school; 22% went to some college ; 35% graduated college.

Employed in food service jobs, healthcare support jobs, and construction and maintenance jobs; 9% are students.

*Housing characteristics:* Renters in new suburban townhouses, owners of older detached housing stock.

'70s to '90s construction.

*Consumption patterns:* Owns a Mazda.

Shops at Forever 21.

Plays soccer.

Reads *Sports Illustrated*.

Watches *MTV2*.

Eats at Domino's Pizza.

*Icons:* Fan blogs; Pokémon GO.



“Everything not saved will be lost.”

– Nintendo quit screen message





YOUNGER SINGLES & COUPLES

– *Town & Country/Exurbs* –



HOMETOWN SWEETHEARTS

---

*Configuration:* Some singles, but mainly couples.

Average household size—2 persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$58,000.

2024 national median housing value (for the nearly two-thirds who own): \$183,100.

Below-average technology use.

White 70%, Latino 17%, African American 12%.

34% high school educated; 19% have college degrees.

Building, landscaping and housekeeping, personal and childcare services, as well as sales and office-related jobs.

*Housing characteristics:* Single family houses, townhouses, and apartments in and around small towns in the country.

Almost a third live in dwellings built between 1990-2010.

Close to 70% have lived in their current dwelling for over five years.

*Consumption patterns:* Owns a Jeep.

Shops at a Walmart Supercenter.

Drives a recreational vehicle (RV).

Follows extreme sports.

Never misses the Country Music Awards.

Eats at Little Caesars.

*Icons:* High School Reunions; Peyton Manning.



“Blame it all on my roots,  
I showed up in boots.”

– Garth Brooks



BLUE-COLLAR TRADITIONALISTS

---

*Configuration:* Singles and unmarried couples, some married couples.

Average household size—1 to 2 persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$56,100.

2024 national median housing value (for the more than three-quarters who own):  
\$160,100.

Working class whites. Disdainful of tech.

40% high-school graduates; 21% attended college; 24% have degrees.

Making the challenging transition from blue-collar, farming, factory, construction  
and maintenance jobs, to service industry jobs.

*Housing characteristics:* Large-lot detached houses outside small towns and rural villages.

Most own houses built between 1970 and 2000.

*Consumption patterns:* Owns a Chevrolet.

Shops at Save-a-Lot.

Reads *U.S. News & World Report*.

Monster truck enthusiasts.

Watches *Ultimate Fighting Championship*.

Eats at Ponderosa.

*Icons:* Job retraining certificate; Monster Jam polo shirt.



“My parents had always preached the virtues of hard work.

But hard work is one thing; economic struggle is another”

– Sargent Shriver



RURAL COUPLES

---

*Configuration:* A third are single and the rest are married couples.

Average household size—2 persons.

Predominant age range of adults—30 to 44.

*Characteristics:* 2024 national median household income: \$43,600.

2024 national median home value (for the nearly two-thirds who own): \$125,700.

Rarely checks social media.

Long for a simple life without the economic woes.

21% did not finish high school; 38% graduated high school; 21% had some college.

12% carpool to work.

Employed in construction and maintenance, sales, office, and telemarketing and tele-representation jobs.

*Housing characteristics:* Rural crossroads villages. Areas that haven't seen new development in decades.

Mobile homes; modest ranch houses on small lots.

*Consumption patterns:* Owns a Ford.

Shops at Dollar General.

Follows NASCAR and monster trucks.

Goes on overnight camping trips.

Watches *CMT*.

Eats at Hardee's.

*Icons:* NASCAR bumper stickers; the doublewide.



“Driving a race car  
is like dancing with a chainsaw.”

– Cale Yarborough



RURAL STRIVERS

---

*Configuration:* Primarily singles, room-mates, and a few married couples.

Average household size—1 to 2 persons.

Predominant age range of adults—25 to 44.

*Characteristics:* 2024 national median household income: \$34,900.

2024 national median home value (for the nearly half who own): \$127,000.

White 55%, African American 26%, Latino 18%.

35% graduated high school; 21% have some college; 22% have college degrees.

Service workers; some are students renting together.

*Housing characteristics:* Small, isolated rural settlements. Older clapboard houses that require constant upkeep, and mobile homes.

Over two-thirds were built before the 1990s.

*Consumption patterns:* Owns a Chrysler.

Shops at Walmart Neighborhood Market.

Takes karate or other martial arts.

Reads *Transworld Motocross*.

Watches *Tru TV*.

*Icons:* Double coupon day; NASCAR on TV.



“Rust never sleeps.”

– Neil Young



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AN UPDATE  
of  
RESIDENTIAL MARKET POTENTIAL

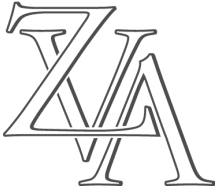
For  
  
The Downtown Macon Study Area

Macon-Bibb County, Georgia

February, 2025

Conducted by  
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Residential Market Analysis Across the Urban-to-Rural Transect

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Residential Market Analysis Across the Urban-to-Rural Transect

### AN UPDATE OF RESIDENTIAL MARKET POTENTIAL

The Downtown Macon Study Area  
Macon-Bibb County, Georgia  
February, 2025

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#### INTRODUCTION

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The purpose of this study is to update the annual market potential and optimum market position for new rental and ownership housing units that could be constructed within the Downtown Macon Study Area in Macon-Bibb County, Georgia. The original study was published in April, 2008, and subsequently updated in 2014 and 2019.

The optimum market position for new housing units in the Downtown has been derived from the housing preferences, financial capabilities, and lifestyle characteristics of the households with the potential to move within or to Macon-Bibb County and to the Downtown; the location, visibility and physical attributes of the study area; the housing market context in the market area; and Zimmerman/Volk Associates' extensive experience with urban development and redevelopment. For the purpose of this update, the boundaries of the Downtown Study Area are the same as previous studies and include Interstate 16 and the Emery Highway to the north, the boundary of the Ocmulgee National Monument and 7<sup>th</sup> Street to the east, the railroad tracks and Mercer University Drive to the south, and Interstate 75 to the west. In addition to the core Downtown and Mercer University, several neighborhoods are included, entirely or in part, within the Downtown Study Area: East Macon, In-Town Macon, College Hill, Beall's Hill, Huegenin Heights, Tatnall Square Heights, and Pleasant Hill.

The extent and characteristics of the potential market for new housing units that could be developed within the Downtown Macon Study Area, then, were updated using Zimmerman/Volk Associates' proprietary target market methodology. This methodology was developed in response to the challenges that are inherent in the application of conventional supply/demand analysis to

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urban development and redevelopment. Supply/demand analysis ignores the potential impact of newly-introduced housing supply on settlement patterns, which can be substantial when housing choices in the market are increased with new housing types that match the housing preferences and economic capabilities of the draw area households.

In contrast to conventional supply/demand analysis, which is typically limited by supply-side dynamics and baseline demographic projections, target market analysis determines the depth and breadth of the potential market derived from the housing preferences and socio-economic characteristics of households in the defined draw areas. Because it considers not only basic demographic characteristics, such as income qualification and age, but also less frequently analyzed attributes such as lifestage, mobility rates, lifestyle patterns and household compatibility issues, the target market methodology is particularly effective in defining a realistic housing potential for urban development and redevelopment with housing types that do not currently exist in the market.

In brief, using the target market methodology, Zimmerman/Volk Associates examined the following:

- Where the potential residents of new housing units in the Downtown Macon Study Area are likely to move from (the draw areas);
- How many households have the potential to move within and to the Downtown each year over the next five years (depth and breadth of the market);
- What their housing preferences are in aggregate, and what their range of affordability is (rental or ownership, multi-family or single-family; income qualifications);
- Who they are and what they are like (the target markets);
- What their current housing alternatives are (relevant and/or recently developed rental and for-sale properties in the market area);
- What are the rent and price ranges of new units that could be developed within the Downtown, and what are the specific rents and prices, unit mix, sizes, and

- configurations that correspond to target household financial capabilities (optimum market position); and
- How quickly the new units will sell or lease up (absorption forecasts).

The target market methodology is described in detail in the METHODOLOGY document, provided separately.

#### COUNTY-WIDE AVERAGE ANNUAL MARKET POTENTIAL

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An analysis of migration, mobility and geo-demographic characteristics of households currently living within defined draw areas is integral to the determination of the depth and breadth of the potential market for new housing units within Macon-Bibb County and the Downtown Macon Study Area.

An understanding of these mobility trends, as well as the socio-economic and lifestyle characteristics of households currently living within defined draw areas, is the first step in the analysis. The draw areas are derived primarily through household migration analysis (using the latest taxpayer data provided by the Internal Revenue Service). To refine the draw area for the county, the IRS migration data have been supplemented by population migration and mobility data for Macon-Bibb from the most recent American Community Survey.

*Where are the potential renters and buyers of new and existing housing units in Macon-Bibb County likely to move from?*

The most recent Macon-Bibb County migration and mobility data—from taxpayer records compiled by the Internal Revenue Service from 2017 through 2021 and from the most recent American Community Survey one-year estimates—shows that the draw areas for new and existing housing units in the county include the following:

- The county draw area, covering households moving within Macon-Bibb County.
- The regional draw area, covering households with the potential to move to Macon-Bibb County from Jones and Monroe counties.
- The Houston County draw area, covering households with the potential to move to Macon-Bibb County from Houston County.

- The national draw area, covering households with the potential to move to the county from all other U.S. counties.

As determined by the migration and mobility analyses, then, the distribution of the draw areas as a percentage of the annual potential market for new and existing housing units in Macon-Bibb County is shown on the following table:

Annual Average Market Potential by Draw Area  
*Macon-Bibb County, Georgia*

|   |              |
|---|--------------|
| Macon-Bibb County (County Draw Area):           | 58.9%        |
| Jones and Monroe Counties (Regional Draw Area): | 4.8%         |
| Houston County (Houston County Draw Area):      | 5.7%         |
| Balance of the U.S. (National Draw Area):       | <u>30.6%</u> |
| Total:  | 100.0%       |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

As updated by the target market methodology, which accounts for household mobility within the county, as well as mobility patterns for households currently living in all other counties, an annual average of 9,540 households of all incomes represent the potential market for new and existing housing units within the county each year over the next five years. This is considerably higher than the 7,335 households that made up the annual potential market in 2019, partly because at that time market potential was determined for the City of Macon, not Macon-Bibb county as a whole.

AVERAGE ANNUAL MARKET POTENTIAL FOR THE DOWNTOWN MACON STUDY AREA \_\_\_\_\_

*Where are the potential renters and buyers of new and existing housing units  
 in the Downtown Macon Study Area likely to move from?*

The target market methodology identifies those households with a preference for living in different types of neighborhoods. After excluding those segments of the county’s potential market that have preferences for suburban and/or rural locations, the distribution of draw area market potential for new units within the Downtown Macon Study Area are as shown on the table on the following page.

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Annual Average Market Potential by Draw Area  
 THE DOWNTOWN MACON STUDY AREA  
*Macon-Bibb County, Georgia*

|                            |              |
|----------------------------|--------------|
| Macon-Bibb County:         | 51.3%        |
| Jones and Monroe Counties: | 0.4%         |
| Houston County:            | 6.0%         |
| Balance of the U.S.:       | <u>42.3%</u> |
| Total:                     | 100.0%       |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

Based on this analysis, which accounts for household mobility within and to Macon-Bibb County and Downtown Macon, as well as migration and mobility patterns for households currently living in all other counties, an annual average of 2,825 younger singles and couples, empty nesters and retirees, and traditional and non-traditional families of all incomes represent the potential market for new housing units within the Downtown Study Area each year over the next five years. This represents an increase of 225 households (or 8.7 percent) over the 2019 study.

*What are their housing preferences in aggregate?*

The housing preferences of the draw area households—derived from their tenure (rental/ownership) propensities—are outlined on the following table:

Average Annual Potential Market for New and Existing Housing Units  
 THE DOWNTOWN MACON STUDY AREA  
*Macon-Bibb County, Georgia*

| HOUSING TYPE   | NUMBER OF HOUSEHOLDS | PERCENT OF TOTAL |
|--|----------------------|------------------|
| For-rent<br>(lofts/apartments, leaseholder)  | 1,784                | 63.2%            |
| Multi-family for-sale<br>(lofts/apartments, condominium ownership)                                       | 219                  | 7.7%             |
| Single-family attached for-sale<br>(duplexes/townhouses/rowhouses, fee-simple/<br>condominium ownership) | 269                  | 9.5%             |
| Single-family detached for-sale<br>(houses, fee-simple ownership)  | <u>553</u>           | <u>19.6%</u>     |
| TOTAL  | 2,825                | 100.0%           |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

As noted on the table, 1,784 households of all incomes (37 households fewer than in 2019) comprise the market for multi-family rental dwelling units, accounting for 63.2 percent of the 2,825 target households—a decrease from 70 percent in 2019—indicating a slight shift in the market from new rental units to homeownership.

The remaining 36.8 percent of the market (1,041 households of all incomes) would choose ownership housing. Approximately 21 percent (219 households) of the ownership market would choose multi-family units (condominium apartments/lofts), another 25.9 percent (269 households) would choose single-family attached units (rowhouses/townhouses/duplexes), and the remaining 53.1 percent (553 households) would choose single-family detached units (houses). The largest absolute increase since 2019 is in the market for condominiums (145 households higher), while single-family attached units rose by 84 households, and only an additional 33 households have preferences for single-family detached.

*What is their range of affordability by housing type?*

The 2,825 households that represent the potential market for new and existing housing units in the Downtown Macon Study Area have been segmented by income, based on the Macon-Bibb County, GA median family income (AMI), which, for fiscal year 2024 is \$70,700 for a family of four. (See METHODOLOGY: AN ANALYSIS OF RESIDENTIAL MARKET POTENTIAL *for the breakdown of incomes by household size as established by the U.S. Department of Housing and Urban Development in April 2024.*)

The combined tenure and housing type preferences and financial capabilities of the 2,825 target households are shown on the table on the following page. (See again Table 1.)

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Tenure/Housing Type Propensities by Income  
 Annual Average Market Potential  
 THE DOWNTOWN MACON STUDY AREA  
 Macon-Bibb County, Georgia

| HOUSING TYPE   | ..... HOUSEHOLDS ..... |              |
|--|------------------------|--------------|
|  | NUMBER                 | PERCENT      |
| For-rent<br>(lofts/apartments/leasehold)   | <u>1,784</u>           | <u>63.2%</u> |
| < 30% AMI  | 466                    | 16.5%        |
| 30% to 60% AMI   | 318                    | 11.3%        |
| 60% to 80% AMI   | 193                    | 6.8%         |
| 80% to 100%  | 150                    | 5.3%         |
| > 100%   | 657                    | 23.3%        |
| Multi-family for-sale<br>(lofts/apartments, condo/co-op ownership)                       | <u>219</u>             | <u>7.7%</u>  |
| < 30% AMI  | 49                     | 1.7%         |
| 30% to 60% AMI   | 33                     | 1.2%         |
| 60% to 80% AMI   | 21                     | 0.7%         |
| 80% to 100%  | 17                     | 0.6%         |
| > 100%   | 99                     | 3.5%         |
| Single-family attached for-sale<br>(duplexes/townhouses/rowhouses, fee-simple ownership) | <u>269</u>             | <u>9.5%</u>  |
| < 30% AMI  | 57                     | 2.0%         |
| 30% to 60% AMI   | 38                     | 1.4%         |
| 60% to 80% AMI   | 23                     | 0.8%         |
| 80% to 100%  | 20                     | 0.7%         |
| > 100%   | 131                    | 4.6%         |
| Single-family detached for-sale<br>(houses, fee-simple ownership)                        | <u>553</u>             | <u>19.6%</u> |
| < 30% AMI  | 89                     | 3.2%         |
| 30% to 60% AMI   | 66                     | 2.3%         |
| 60% to 80% AMI   | 51                     | 1.8%         |
| 80% to 100%  | 44                     | 1.6%         |
| > 100%   | 303                    | 10.7%        |
| TOTAL  | 2,825                  | 100.0%       |

NOTE: For fiscal year 2024, the Macon-Bibb County, GA Median Family Income for a family of four is \$70,700.

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

Summarizing the income ranges of the 2,825 households that represent the annual potential market for new and existing housing units in Downtown Macon, 23.4 percent (661 households) have incomes below 30 percent AMI; 16.1 percent (455 households) have incomes between 30 and 60 percent AMI; 10.2 percent (288 households) have incomes between 60 and 80 percent AMI; 8.2

percent (231 households) have incomes between 80 and 100 percent AMI; and 42.1 percent (1,190 households) have incomes at or above 100 percent AMI.

#### TARGET MARKET ANALYSIS

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*Who are the households that represent the potential market for new and existing units in Downtown Macon?*

As updated by the target market analysis, then, the general market segments by lifestage that represent the potential market for new and existing units in the Downtown Macon Study Area are as follows (*see also* Table 2 *following the text*):

- Younger singles and childless couples (53.8 percent);
- Empty nesters and retirees (31.2 percent); and
- Traditional and non-traditional family households (15 percent).

#### YOUNGER SINGLES AND COUPLES

At 53.8 percent of the annual potential market for new and existing housing units in the Downtown, younger households (younger singles and couples) represent the majority of the market.

Approximately 44.5 percent of these households have incomes that fall below 60 percent of the AMI—Area Median Income—at or below \$29,700 for a single-person household and at or below \$33,950 for a two-person household). An estimated 10.7 percent of the younger singles and couples have incomes that fall between 60 and 80 percent of the AMI (\$29,700 to \$39,600 for a single-person household, and \$33,950 to \$45,250 for a two-person household).

An estimated 8.4 percent of the younger singles and couples have incomes that fall between 80 and 100 percent of the AMI (\$39,600 to \$49,500 for a single-person household, and from \$45,250 to \$56,600 for a two-person household). The remaining 36.4 percent of the younger singles and couples have incomes above 100% AMI (\$49,500 for a single-person household, and \$56,600 for a two-person household).

Nearly 55 percent of younger singles and couples would be moving to Downtown Macon from elsewhere in Macon-Bibb County; 5.3 percent would be moving from Houston County; and just under forty percent would be moving from elsewhere in the U.S.

#### EMPTY NESTERS AND RETIREES

At 31.2 percent of the annual potential market for new and existing housing units in the Downtown Macon Study Area, older households (empty nesters and retirees) represent the second largest share of the market.

In this general market segment, 33.5 percent have incomes at or below 60 percent of AMI (at or below \$29,700 for a single-person household and at or below \$33,950 for a two-person household). Another 8.8 percent of the older target households have incomes between 60 and 80 percent of the area median. (Approximately \$29,700 to \$39,600 for a single-person household, and from \$33,950 to \$45,250 for a two-person household).

Older households with incomes between 80 and 100 percent of AMI comprise 7.2 percent of the target empty nester and retiree market segment (\$39,600 to \$49,500 for a single-person household, and from \$45,250 to \$56,600 for a two-person household). The remaining 50.6 percent of empty nesters and retirees have incomes above 100 percent AMI (\$49,500 for a single-person household, and \$56,600 for a two-person household).

An estimated 54 percent of empty nesters and retirees would be moving from within Macon-Bibb County; just over one percent would be moving from the Jones or Monroe counties; 5.7 percent would be moving from Houston County; and the remaining 39.2 percent would be moving from elsewhere in the U.S.

### TRADITIONAL AND NON-TRADITIONAL FAMILIES

Traditional and non-traditional families represent the smallest share of the annual potential market for new and existing housing units in Downtown Macon with 15 percent of the market.

Just over 34 percent of the family households that comprise the annual potential market for Downtown Macon have incomes below 60 percent AMI (at or below \$38,200 for a three-person household and at or below \$45,800 for a five-person household). An estimated 11.3 percent of the family-oriented households have incomes that fall within the 60-to-80 percent income band. (At 60 to 80 percent AMI, incomes for three-person households range between \$38,200 and \$50,900, and incomes for five-person households range between \$45,800 and \$61,100.)

An estimated 9.6 percent of family households have incomes between 80 and 100 percent of AMI. (At 80 to 100 percent AMI, incomes for three-person households are between \$50,900 and 63,650 and five-person households between \$61,100 and \$76,400.) Just under 45 percent of traditional and non-traditional families have incomes above 100 percent AMI. (Incomes at or above 100 percent AMI for three-person households are at or above \$63,650 in 2024, and for five-person households are at or above \$76,400.)

Just under 33 percent of traditional and non-traditional families would be moving from within the county; 9.4 percent would be moving from Houston County; and the remaining 57.6 percent would be moving from elsewhere in the U.S., primarily other counties in Georgia.

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 THE MARKET CONTEXT
 

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*What are their current housing alternatives?*

Individual property information is provided in tabular form on Table 3, Summary of Selected Rental Properties, Table 4, Summary of Selected For-Sale Multi-Family and Single-Family Attached Listings, and Table 5, Summary of Selected Single-Family Detached Houses New Construction and Resale Listings following the text.

Redfin’s Walk Score has been included with each property listing. Although Walk Score measures only distance, and metrics such as intersection density and block lengths to grade the walkability of a specific address or neighborhood, it has grown in importance as a value criterion. Walk Scores above 90 indicate a “Walker’s Paradise,” where daily errands do not require a car. Walk Scores between 70 and 90 are considered to be very walkable, where most errands can be accomplished on foot, and Walk Scores between 50 and 69 are regarded as somewhat walkable, where some errands can be accomplished on foot. Walk Scores below 50 indicate that most or almost all errands require an automobile.

Eleven of the 14 downtown multi-family properties included in the rental survey have a Walk Score between above 70, “very walkable”, while the other three have scores between 50 and 70, “somewhat walkable.” With just one exception, all of the listings outside the Downtown have scores below 50.

Of the 10 multi-family and single-family attached for-sale properties surveyed, only one has a Walk Score above 50, a condominium on Robin Lyn Court with a score of 53. All of the others have a Walk Score below 50, making them “car-dependent”. The only single-family detached property with a score over 50 is at the Lincoln Heights development on Monroe Avenue, with a Walk Score of 58.

—MULTI-FAMILY RENTAL PROPERTIES—

At the time of the survey, seven of the 14 properties in Downtown Macon were at functional full occupancy. Hemlock Lofts, which opened in 2024, was still in lease-up, and the occupancy

information for three downtown properties was not available. The three remaining properties reported occupancies ranging between 80 and 88 percent.

Table 3 provides detailed information on 23 rental properties, leasing more than 2,500 units, located in the Macon-Bibb market area and is summarized below.

—*Studios (Eight Properties)*—

- Rents for studios range between \$700 per month at Caswell at Katherine, located on Mulberry Street in Downtown Macon to \$1,250 per month at Market House Lofts on Poplar Street in the Downtown.
- Studios contain between 300 square feet at Caswell at Lanier Park on New Street in Downtown Macon and 855 square feet at Broadway Lofts on Martin Luther King Junior Boulevard in Downtown Macon.
- The studio rents per square foot range between \$1.29 at Caswell at Katherine and \$2.97 at Caswell at Lanier Park.

—*One-Bedroom Units (19 Properties)*—

- Rents for one-bedroom units at the surveyed properties range between \$750 per month at The Park at 4690 on Log Cabin Drive in Macon, and \$2,513 per month at Lofts at Capricorn on Martin Luther King Junior Boulevard in Downtown Macon.
- One-bedroom units range in size from 475 square feet at Caswell at Lanier Park to 1,765 square feet at Lofts at Zebulon on Zebulon Road in the balance of Macon-Bibb County.
- One-bedroom unit rents per square foot fall between \$0.89 at Caswell at Katherine for a two-bath unit and \$3.11 at Lofts at Capricorn.

—*Two-Bedroom Units (20 Properties)*—

- Rents for two-bedroom units start at \$975 per month for a one-bath apartment at Caswell at The Terrace and are as high as \$2,450 per month for a two-bath apartment at Hemlock Lofts.
- Two-bedroom units range in size from 660 square feet for a one-bath unit at Caswell at The Terrace to 2,168 square feet for the two-bath unit at Lofts at Zebulon.
- Two-bedroom rents per square foot fall between \$0.84 at Northwood located on Thomaston Road in the balance of Macon-Bibb County and \$2.09 at Lofts at Bass on Bowman Road in the balance of Macon-Bibb County.

—*Three-Bedroom Units (Seven Properties)*—

- Rents for three-bedroom units start at \$1,424 per month for a two-bath apartment at Riverstone on Riverside Park Boulevard in the balance of Macon-Bibb County and reach \$2,700 per month for a three-bath loft at Hemlock Lofts.
- Three-bedroom units range in size from 1,360 square feet for a two-bath unit at Thomaston Crossing on Thomaston Road in the balance of Macon-Bibb County to 2,075 square feet for the two-bath unit at Caswell at Katherine.
- Three-bedroom rents per square foot fall between \$0.90 for a two-bath apartment at Riverstone and \$1.41 at Hemlock Lofts for a three-bath unit.

—MULTI-FAMILY AND SINGLE-FAMILY ATTACHED FOR-SALE PROPERTIES—

Table 4 provides pricing, unit sizes, and configuration information for new construction and resale condominium and townhouse listings on the market as of January 2025. All of the newly-constructed units are townhouses located outside of Macon.

The least-expensive new construction property, Goodall Woods, is marketing four-bedroom, two-and-a-half bath townhouses priced between \$265,990 and \$274,490 for 2,000- to 2,050-square-feet of living area (\$133 to \$134 per square foot). The other new construction listing is located on

Cliffstone Court in the Madison development, selling a three-bedroom, two-bath townhouse for \$425,000. The unit size was unavailable for that listing.

There were two resale listings on the market in Downtown Macon at the time of the survey. One townhouse on Walnut Street was priced at \$275,000 for a 2,948-square-foot, three-bedroom, three-and-a-half bath unit (\$93 per square foot), and a 1,615-square-foot, two-bedroom, two-bath condominium had an asking price of \$475,000 (\$294 per square foot).

Elsewhere in Macon, there were four townhouse resale listings on the market priced between \$138,000 and \$169,900. All had two- or three-bedrooms and one-and-a-half-, two, or two-and-a-half baths, with sizes ranging between 1,036 and 2,419 square feet. Prices per square foot ranged between \$70 and \$139. One two-bedroom, two-and-a-half bath condominium listed for resale was priced at \$145,000 for 1,560 square feet (\$93 per square foot).

Outside of Macon, there was one townhouse listed for resale in the Wellington development, a two-bedroom, two-bath unit priced at \$307,500 for 1,875 square feet (\$164 per square foot).

—SINGLE-FAMILY DETACHED FOR-SALE PROPERTIES—

Table 5 provides pricing, unit sizes, and configuration information for new construction and resale detached house listings on the market as of January 2025.

Three infill sites have recently constructed houses from 2021 through 2024, all of which were two-bedroom units. Priced between \$150,000 and \$379,900, unit sizes ranged between 704 and 1,962 square feet (\$160 to \$213 per square foot). Other new construction listings in developments were all three-bedroom units priced between \$170,000 and \$360,000, with unit sizes from 1,159 to 2,182 square feet (\$147 to \$173 per square foot). Six resales were listed in The Highlands/Highland Plantation development, consisting of four three-bedroom units and two four-bedroom units. Resale prices ranged between \$218,000 and \$238,500 with unit sizes between 1,594 and 2,069 (\$105 to \$145 per square foot).

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**TARGET MARKET FINANCIAL CAPABILITIES: THE DOWNTOWN MACON STUDY AREA**


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*What are the general rent and price ranges that correspond to target households' financial capabilities?*

This analysis is focused on rental and for-sale units affordable to those households with incomes at or above 60 percent AMI. A total of 1,709 renter and owner households with incomes at or above 60 percent AMI (new rental and for-sale units) represent the market for newly-created housing units in the Downtown Macon Study Area. The combined housing preferences by tenure and by income of those 1,709 target households are shown on the following table (*reference again Table 1 following the text*):

**Tenure/Housing Type Propensities by Income**  
**THE DOWNTOWN MACON STUDY AREA**  
*Macon-Bibb County, Georgia*

| HOUSING TYPE   | ..... HOUSEHOLDS ..... |              |
|--|------------------------|--------------|
|  | NUMBER                 | PERCENT      |
| For-rent<br>(lofts/apartments/<br>duplexes/townhouses, leasehold)  | <u>1,000</u>           | <u>58.5%</u> |
| 60% to 80% AMI   | 193                    | 11.3%        |
| 80% to 100%  | 150                    | 8.8%         |
| > 100%   | 657                    | 38.4%        |
| Multi-family for-sale<br>(lofts/apartments, condo/co-op ownership)                                       | <u>137</u>             | <u>8.0%</u>  |
| 60% to 80% AMI   | 21                     | 1.2%         |
| 80% to 100%  | 17                     | 1.0%         |
| > 100%   | 99                     | 5.8%         |
| Single-family attached for-sale<br>(duplexes/townhouses/rowhouses, fee-simple/<br>condominium ownership) | <u>174</u>             | <u>10.2%</u> |
| 60% to 80% AMI   | 23                     | 1.3%         |
| 80% to 100%  | 20                     | 1.2%         |
| > 100%   | 131                    | 7.7%         |
| Single-family detached for-sale<br>(houses, fee-simple ownership)  | <u>398</u>             | <u>23.3%</u> |
| 60% to 80% AMI   | 51                     | 3.0%         |
| 80% to 100%  | 44                     | 2.6%         |
| > 100%   | 303                    | 17.7%        |
| TOTAL  | 1,709                  | 100.0%       |

NOTE: For fiscal year 2024, the Macon-Bibb County, GA Median Family Income for a family of four is \$70,700.

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

Supportable rent and price ranges have been established through income and wealth analysis as detailed on the following tables.

—*Multi-Family Distribution by Rent Range*—

The number of households able to afford the specified rent ranges detailed on the following table was determined by calculating a monthly rental payment—excluding utilities and ranging between 25 and 30 percent of annual gross income. (Although it is quite possible that many households will pay up to 40 percent of their annual gross incomes in rent, HUD recommends that a tenant pay no more than 30 percent of gross income for rent *including* utilities.)

An annual average of 1,000 households with incomes above 60 percent of the AMI represent the target markets for newly-constructed rental housing units (lofts and apartments) in Downtown Macon (*as shown on Table 6 following the text*). The distribution of supportable rent ranges is summarized on the following table:

New Multi-Family For-Rent  
HOUSEHOLDS WITH INCOMES AT OR ABOVE 60% AMI  
THE DOWNTOWN MACON STUDY AREA  
*Macon-Bibb County, Georgia*

| MONTHLY<br>RENT RANGE | HOUSEHOLDS<br>PER YEAR | PERCENTAGE  |
|-----------------------|------------------------|-------------|
| \$500–\$750           | 99                     | 9.9%        |
| \$750–\$1,000         | 154                    | 15.4%       |
| \$1,000–\$1,250       | 193                    | 19.3%       |
| \$1,250–\$1,500       | 116                    | 11.6%       |
| \$1,500–\$1,750       | 79                     | 7.9%        |
| \$1,750–\$2,000       | 77                     | 7.7%        |
| \$2,000–\$2,250       | 104                    | 10.4%       |
| \$2,250–\$2,500       | 83                     | 8.3%        |
| \$2,500–\$2,750       | 54                     | 5.4%        |
| \$2,750–\$3,000       | 17                     | 1.7%        |
| Over \$3,000          | <u>24</u>              | <u>2.4%</u> |
| Total:                | 1,000                  | 100.0%      |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

- The largest group of target renters for newly-constructed rental units in Downtown Macon are younger singles and couples, at 64.6 percent of the annual market potential. Just over

27 percent have careers that provide them with the financial capacity to afford rents above \$2,000 per month. Another 24.5 percent can support rents between \$1,250 and \$2,000 per month, and 48.4 percent of this market segment could only afford units with rents between \$500 and \$1,250 per month.

- Empty nesters and retirees represent 23.3 percent of the market potential for newly-constructed rental units within Downtown Macon. An estimated 30.5 percent of the empty nesters and retirees have sufficient incomes and assets that enable them to afford rents at or above \$2,000 per month. Just under 28 percent could afford units with rents between \$1,250 and \$2,000 per month, and 41.6 percent of this market segment are able to support rents between \$500 and \$1,250 per month.
- At just over 12 percent, traditional and non-traditional families are the smallest market for new rental units. An estimated 29.8 percent of the families have the ability to pay rents at or above \$2,000 per month; 40.4 percent of them can afford rents between \$1,250 and \$2,000; and the remaining 29.8 percent require rents between \$500 and \$1,250 per month.

—*Multi-Family Distribution by Price Range*—

An annual average of 137 households with incomes above 60 percent of the area median income represent the target markets for newly-created for-sale multi-family housing units (lofts/condominiums) within the Downtown Macon Study Area (*as shown on Table 7 following the text*). Supportable price points have been determined by assuming a down payment of 10 percent, a mortgage interest rate of seven percent and a monthly mortgage payment, including taxes and insurance, that does not exceed 30 percent of gross income for each of the 137 households that represent the annual potential condominium market, yielding the distribution shown on the table following this page.

The Downtown Macon Study Area  
 Macon-Bibb County, Georgia  
 February, 2025

New Multi-Family For-Sale  
 Distribution by Price Range  
 HOUSEHOLDS WITH ANNUAL INCOMES AT OR ABOVE 60% AMI  
 THE DOWNTOWN MACON STUDY AREA  
*Macon-Bibb County, Georgia*

| PRICE<br>RANGE      | HOUSEHOLDS<br>PER YEAR | PERCENTAGE   |
|---------------------|------------------------|--------------|
| \$75,000–\$100,000  | 8                      | 5.8%         |
| \$100,000–\$125,000 | 12                     | 8.8%         |
| \$125,000–\$150,000 | 9                      | 6.6%         |
| \$150,000–\$175,000 | 11                     | 8.0%         |
| \$175,000–\$200,000 | 11                     | 8.0%         |
| \$200,000–\$225,000 | 9                      | 6.6%         |
| \$225,000–\$250,000 | 7                      | 5.1%         |
| \$250,000–\$275,000 | 4                      | 2.9%         |
| \$275,000–\$300,000 | 5                      | 3.6%         |
| \$300,000–\$325,000 | 8                      | 5.8%         |
| \$325,000–\$350,000 | 10                     | 7.3%         |
| \$350,000–\$375,000 | 14                     | 10.2%        |
| \$375,000–\$400,000 | 9                      | 6.6%         |
| \$400,000 and up    | <u>20</u>              | <u>14.6%</u> |
| Total:              | 137                    | 100.0%       |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

- Younger singles and couples comprise 48.2 percent of the market for newly-created for-sale multi-family units (condominiums) within Downtown Macon. An estimated 39.4 percent have the income and assets to purchase new condominiums with base prices above \$325,000. Another 15.2 percent of the younger market have the capacity to purchase new units priced between \$200,000 and \$325,000, and the remaining 45.4 percent can only afford new units priced between \$75,000 and \$200,000.
- Empty nesters and retirees represent 35.8 percent of the market for newly-created condominiums within the Downtown. An estimated 32.7 percent of the empty nesters and retirees could afford new units priced over \$325,000. Another 32.7 percent would be in the market for new condominiums with base prices between \$200,000 and \$325,000, and the remaining 34.6 percent could afford new condominiums priced between \$75,000 and \$200,000.
- Traditional and non-traditional families are the smallest market segment at just 16 percent of the market for newly-created condominiums in the study area. Half of the family

households could afford new condominiums priced over \$325,000. An estimated 31.8 percent could afford units priced between \$200,000 and \$325,000, and the remaining 18.2 percent could only afford units priced between \$75,000 and \$200,000.

—*Single-Family Attached Distribution by Price Range*—

An annual average of 174 households with incomes above 60 percent of the area median income represent the target markets for newly-constructed for-sale single-family attached housing units (rowhouses/townhouses/duplexes) within the Downtown Macon Study Area (*as shown on Table 8 following the text*). Again, supportable price points have been determined by assuming a down payment of 10 percent, a mortgage rate of seven percent, and a monthly mortgage payment, including taxes and insurance, that does not exceed 30 percent of gross income for each of the 174 households that represent the annual potential market of new for-sale single-family attached units, yielding the distribution shown on the following table:

New Single-Family Attached For-Sale  
 Distribution by Price Range  
 HOUSEHOLDS WITH ANNUAL INCOMES AT OR ABOVE 60% AMI  
 THE DOWNTOWN MACON STUDY AREA  
*Macon-Bibb County, Georgia*

| PRICE RANGE         | HOUSEHOLDS PER YEAR | PERCENTAGE   |
|---------------------|---------------------|--------------|
| \$75,000–\$100,000  | 10                  | 5.8%         |
| \$100,000–\$125,000 | 10                  | 5.8%         |
| \$125,000–\$150,000 | 12                  | 6.9%         |
| \$150,000–\$175,000 | 16                  | 9.2%         |
| \$175,000–\$200,000 | 13                  | 7.5%         |
| \$200,000–\$225,000 | 15                  | 8.7%         |
| \$225,000–\$250,000 | 16                  | 9.2%         |
| \$250,000–\$275,000 | 11                  | 6.4%         |
| \$275,000–\$300,000 | 8                   | 4.6%         |
| \$300,000–\$325,000 | 7                   | 4.0%         |
| \$325,000–\$350,000 | 6                   | 3.5%         |
| \$350,000–\$375,000 | 13                  | 7.5%         |
| \$375,000–\$400,000 | 15                  | 8.7%         |
| \$400,000 and up    | <u>21</u>           | <u>12.1%</u> |
| Total:              | 174                 | 100.0%       |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

- Empty nesters and retirees are the largest market, making up 39.1 percent of the market for new for-sale single-family attached units (rowhouses/townhouses) within the Downtown. An estimated 29.4 percent have the income and assets to purchase new rowhouses/townhouses with base prices at or above \$325,000. Approximately 42.6 percent would be in the market for new units priced between \$200,000 and \$325,000, and 28 percent can afford new rowhouses/townhouses with base prices between \$75,000 and \$200,000.
- Younger singles and couples represent 37.9 percent of the market for new rowhouses/townhouses within Downtown Macon. An estimated 27.7 percent of younger singles and couples could afford new units priced over \$325,000. A fifth of younger households would be in the market for new rowhouses/townhouses with base prices between \$200,000 and \$325,000, and the majority, 52.3 percent, could only afford new single-family attached units priced between \$75,000 and \$200,000.
- Traditional and non-traditional families are again the smallest market segment with 23 percent of the market for new single-family attached units in Downtown Macon. An estimated 42.5 percent of family households have the income and assets to purchase new rowhouses/townhouses priced over \$325,000; another 37.5 percent would be in the market for new rowhouses/townhouses with base prices between \$200,000 and \$325,000, and a fifth could only pay between \$75,000 and \$200,000.

—*Single-Family Detached Distribution by Price Range*—

An annual average of 398 households with incomes above 60 percent of the area median income represent the target markets for newly-constructed for-sale single-family detached housing units (houses) within the Downtown Macon Study Area (*as shown on Table 9 following the text*). Again, supportable price points have been determined by assuming a down payment of 10 percent, a mortgage rate of seven percent, and a monthly mortgage payment, including taxes and insurance, that does not exceed 30 percent of gross income for each of the 398 households that represent the annual potential market of new for-sale single-family detached units, yielding the distribution shown on the table on the following page.

The Downtown Macon Study Area  
 Macon-Bibb County, Georgia  
 February, 2025

New Single-Family Detached For-Sale  
 Distribution by Price Range  
 HOUSEHOLDS WITH ANNUAL INCOMES AT OR ABOVE 60% AMI  
 THE DOWNTOWN MACON STUDY AREA  
*Macon-Bibb County, Georgia*

| PRICE RANGE         | HOUSEHOLDS PER YEAR | PERCENTAGE   |
|---------------------|---------------------|--------------|
| \$75,000–\$100,000  | 15                  | 3.8%         |
| \$100,000–\$125,000 | 29                  | 7.3%         |
| \$125,000–\$150,000 | 23                  | 5.8%         |
| \$150,000–\$175,000 | 21                  | 5.3%         |
| \$175,000–\$200,000 | 24                  | 6.0%         |
| \$200,000–\$225,000 | 19                  | 4.8%         |
| \$225,000–\$250,000 | 22                  | 5.5%         |
| \$250,000–\$275,000 | 17                  | 4.3%         |
| \$275,000–\$300,000 | 20                  | 5.0%         |
| \$300,000–\$325,000 | 25                  | 6.3%         |
| \$325,000–\$350,000 | 22                  | 5.5%         |
| \$350,000–\$375,000 | 25                  | 6.3%         |
| \$375,000–\$400,000 | 21                  | 5.3%         |
| \$400,000 and up    | <u>115</u>          | <u>28.9%</u> |
| Total:              | 398                 | 100.0%       |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

- Empty nesters and retirees are again the largest market, making up 59 percent of the market for new for-sale single-family detached units (houses) within the Downtown. The majority—52.3 percent—have the income and assets to purchase new houses with base prices at or above \$325,000. An estimated 25.5 percent would be in the market for new units priced between \$200,000 and \$325,000, and just over 22 percent can afford new houses with base prices between \$75,000 and \$200,000.
- Traditional and non-traditional families are the second largest market segment with 24.4 percent of the market for new single-family detached units in Downtown Macon. A majority—50.5 percent—of family households have the income and assets to purchase new houses priced over \$325,000; approximately 26.8 percent would be in the market for new houses with base prices between \$200,000 and \$325,000, and the remaining 22.7 percent could only pay between \$75,000 and \$200,000.
- Younger singles and couples represent the smallest market segment with only 16.6 percent of the market for new houses within Downtown Macon. An estimated 16.7 percent of

younger singles and couples could afford new units priced over \$325,000; 25.8 percent of younger households would be in the market for new houses with base prices between \$200,000 and \$325,000, and the majority—57.5 percent—could only afford new single-family attached units priced between \$75,000 and \$200,000.

OPTIMUM MARKET POSITION: THE DOWNTOWN MACON STUDY AREA \_\_\_\_\_

*What are the rents and prices and unit sizes and configurations  
that match target household preferences?*

As detailed in the preceding section, an annual average of 1,709 target households—1,000 potential renters, 137 potential condominium buyers, 174 potential rowhouse/townhouse/duplex buyers, and 398 potential single-family detached house buyers—comprise the annual potential market for new housing units in the Downtown Macon Study Area each year over the next five years.

The optimum market position for new housing in Downtown Macon has therefore been developed based on a variety of factors, including but not limited to:

- The tenure and housing preferences, financial capabilities, and lifestages of the 1,709 target households; and
- Residential market dynamics in the Downtown market area.

Based on those factors, the optimum market position for new housing units in the Downtown Macon Study Area is summarized on the table on the following pages. (*See also Table 10 following the text.*)

AN UPDATE OF RESIDENTIAL MARKET POTENTIAL

The Downtown Macon Study Area  
 Macon-Bibb County, Georgia  
 February, 2025

Optimum Market Position  
 THE DOWNTOWN MACON STUDY AREA  
*Macon-Bibb County, Georgia*

| HOUSING<br>TYPE                 | PERCENT<br>MIX | UNIT<br>CONFIGURATION | BASE<br>RENT/PRICE | UNIT<br>SIZE | BASE RENT/PRICE<br>PER SQ. FT. |
|---------------------------------|----------------|-----------------------|--------------------|--------------|--------------------------------|
| MULTI-FAMILY FOR-RENT           |                |                       |                    |              |                                |
| . . . . . Affordable . . . . .  |                |                       |                    |              |                                |
| Microlofts/Lofts                | 40%            | Microloft/1ba         | \$600              | 400          | \$1.50                         |
|                                 | 45%            | 1br/1ba               | \$825              | 550          | \$1.50                         |
|                                 | 15%            | 2br/1ba               | \$1,150            | 800          | \$1.44                         |
| Apartments                      | 60%            | 1br/1ba               | \$850              | 550          | \$1.55                         |
|                                 | 20%            | 2br/1ba               | \$1,200            | 800          | \$1.50                         |
|                                 | 20%            | 2br/2ba               | \$1,300            | 900          | \$1.44                         |
| . . . . . Market-Rate . . . . . |                |                       |                    |              |                                |
| Microlofts/Lofts                | 25%            | Microloft/1ba         | \$900              | 400          | \$2.25                         |
|                                 | 35%            | Studio/1ba            | \$1,100            | 500          | \$2.20                         |
|                                 | 30%            | 1br/1ba               | \$1,350            | 700          | \$1.93                         |
|                                 | 10%            | 2br/2ba               | \$1,650            | 950          | \$1.74                         |
| Apartments                      | 45%            | Studio/1.5ba          | \$1,500            | 600          | \$2.50                         |
|                                 | 25%            | 1br/1ba               | \$1,650            | 750          | \$2.20                         |
|                                 | 15%            | 2br/2ba               | \$2,300            | 1,200        | \$1.92                         |
|                                 | 15%            | 3br/2.5ba             | \$2,700            | 1,450        | \$1.86                         |
| MULTI-FAMILY FOR-SALE           |                |                       |                    |              |                                |
| . . . . . Affordable . . . . .  |                |                       |                    |              |                                |
| Condominiums                    | 55%            | 1br/1ba               | \$125,000          | 600          | \$208                          |
|                                 | 35%            | 2br/1ba               | \$185,000          | 900          | \$206                          |
|                                 | 10%            | 2br/2ba               | \$205,000          | 1,000        | \$205                          |
| . . . . . Market-Rate . . . . . |                |                       |                    |              |                                |
| Condominiums                    | 45%            | 1br/1.5ba             | \$265,000          | 900          | \$294                          |
|                                 | 35%            | 2br/2ba               | \$335,000          | 1,250        | \$268                          |
|                                 | 20%            | 2br/2.5ba             | \$375,000          | 1,450        | \$259                          |

Continued on the following page . . . . .

AN UPDATE OF RESIDENTIAL MARKET POTENTIAL

The Downtown Macon Study Area  
 Macon-Bibb County, Georgia  
 February, 2025

..... Continued from previous page

| HOUSING TYPE                    | PERCENT MIX | UNIT CONFIGURATION | BASE RENT/PRICE | UNIT SIZE | BASE RENT/PRICE PER SQ. FT. |
|---------------------------------|-------------|--------------------|-----------------|-----------|-----------------------------|
| SINGLE-FAMILY ATTACHED FOR-SALE |             |                    |                 |           |                             |
| ..... Affordable .....          |             |                    |                 |           |                             |
| Rowhouses/                      | 50%         | 2br/1ba            | \$195,000       | 925       | \$211                       |
| Townhouses                      | 25%         | 2br/1.5ba          | \$210,000       | 1,050     | \$200                       |
|                                 | 25%         | 3br/1.5ba          | \$235,000       | 1,250     | \$188                       |
| ..... Market-Rate .....         |             |                    |                 |           |                             |
| Townhouses/                     | 35%         | 2br/1.5ba          | \$325,000       | 1,200     | \$271                       |
| Duplexes                        | 45%         | 2br/2.5ba          | \$365,000       | 1,350     | \$270                       |
|                                 | 20%         | 3br/2.5ba          | \$415,000       | 1,550     | \$268                       |
| SINGLE-FAMILY DETACHED FOR-SALE |             |                    |                 |           |                             |
| ..... Affordable .....          |             |                    |                 |           |                             |
| Tiny Houses                     | 45%         | 1br/1ba            | \$85,000        | 450       | \$189                       |
|                                 | 25%         | 1br/1ba            | \$100,000       | 550       | \$182                       |
|                                 | 30%         | 2br/1ba            | \$135,000       | 750       | \$180                       |
| Cottages                        | 35%         | 2br/1ba            | \$165,000       | 950       | \$174                       |
|                                 | 45%         | 2br/2ba            | \$190,000       | 1,150     | \$165                       |
|                                 | 20%         | 3br/2ba            | \$215,000       | 1,350     | \$159                       |
| ..... Market-Rate .....         |             |                    |                 |           |                             |
| Urban Houses                    | 30%         | 2br/2.5ba          | \$350,000       | 1,300     | \$269                       |
|                                 | 30%         | 3br/2ba            | \$395,000       | 1,500     | \$263                       |
|                                 | 25%         | 3br/2.5ba          | \$425,000       | 1,650     | \$258                       |
|                                 | 15%         | 4br/2.5ba          | \$465,000       | 1,850     | \$251                       |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

The proposed rents are in year 2025 dollars and correspond to the financial capabilities of the target households.

The weighted averages for each of the housing types are shown on the table on the following page.

## AN UPDATE OF RESIDENTIAL MARKET POTENTIAL

The Downtown Macon Study Area  
 Macon-Bibb County, Georgia  
 February, 2025

Weighted Average Base Rents and Prices and Size Ranges  
 THE DOWNTOWN MACON STUDY AREA  
*Macon-Bibb County, Georgia*

| HOUSING<br>TYPE             | BASE<br>RENT/PRICE | UNIT<br>SIZE | BASE RENT/PRICE<br>PER SQ. FT. |
|-----------------------------|--------------------|--------------|--------------------------------|
| MULTI-FAMILY FOR-RENT       |                    |              |                                |
| Microlofts/Lofts            |                    |              |                                |
| Affordable                  | \$784              | 528 sf       | \$1.49 psf                     |
| Market-Rate                 | \$1,180            | 580 sf       | \$2.03 psf                     |
| Apartments                  |                    |              |                                |
| Affordable                  | \$1,010            | 670 sf       | \$1.51 psf                     |
| Market-Rate                 | \$1,838            | 855 sf       | \$2.15 psf                     |
| Combined Weighted Averages: | \$1,314            | 682 sf       | \$1.93 psf                     |
| MULTI-FAMILY FOR-SALE       |                    |              |                                |
| Condominiums                |                    |              |                                |
| Affordable                  | \$154,000          | 745 sf       | \$207 psf                      |
| Market-Rate                 | \$311,500          | 1,133 sf     | \$275 psf                      |
| Combined Weighted Averages: | \$267,814          | 1,025 sf     | \$261 psf                      |
| SINGLE-FAMILY ATTACHED      |                    |              |                                |
| Rowhouses/Townhouses        |                    |              |                                |
| Affordable                  | \$208,750          | 1,038 sf     | \$201 psf                      |
| Townhouses/Duplexes         |                    |              |                                |
| Market-Rate                 | \$361,000          | 1,338 sf     | \$270 psf                      |
| Combined Weighted Averages: | \$323,375          | 1,263 sf     | \$256 psf                      |
| SINGLE-FAMILY DETACHED      |                    |              |                                |
| Tiny Houses                 |                    |              |                                |
| Affordable                  | \$103,750          | 565 sf       | \$184 psf                      |
| Cottages                    |                    |              |                                |
| Affordable                  | \$186,250          | 1,120 sf     | \$166 psf                      |
| Urban Houses                |                    |              |                                |
| Market-Rate                 | \$399,500          | 1,530 sf     | \$261 psf                      |
| Combined Weighted Averages: | \$302,664          | 1,293 sf     | \$234 psf                      |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

MARKET CAPTURE

*How fast will the units lease or sell?*

Based on 37 years’ experience using the target market methodology in 47 states, Zimmerman/Volk Associates has developed and refined a capture rate methodology scaled to study area size and context. Zimmerman/Volk Associates has determined that, for a study area the size of Downtown Macon, a capture rate of between 15 and 18 percent of the annual average number of potential renters and a capture rate of between 10 and 12 percent of the annual average number of potential buyers is supportable each year over the next five years, assuming the production of appropriately-positioned new housing.

Based on these capture rates, annual average absorption of new housing units in the Downtown Macon Study Area is forecast as follows (*see again* Table 10 *for greater detail*):

Annual Forecast Absorption  
 Households With Incomes Above 60% AMI  
 THE DOWNTOWN MACON STUDY AREA  
 Macon-Bibb County, Georgia

| HOUSING TYPE                    | NUMBER OF HOUSEHOLDS | ANNUAL UNITS ABSORBED | CAPTURE RATES |
|---------------------------------|----------------------|-----------------------|---------------|
| Multi-family for-rent           | 1,000                | 149 - 179             | 15 – 18%      |
| Multi-family for-sale           | 137                  | 14 - 17               | 10 – 12%      |
| Single-family attached for-sale | 174                  | 17 - 21               | 10 – 12%      |
| Single-family detached for-sale | <u>398</u>           | <u>40 - 47</u>        | 10 – 12%      |
| Total                           | 1,709                | 220 - 264 units       |               |

SOURCE: Zimmerman/Volk Associates, Inc., 2025.

If there is sufficient new housing production to achieve these capture rates, between 220 and 264 new affordable/workforce and market-rate rental and for-sale housing units per year could be leased or sold in Downtown Macon annually over five years. The five-year forecast total is 1,100 to 1,320 potential new units.

New housing units, configured according to target market preferences, can not only attract new households to the Downtown Macon Study Area and to Macon-Bibb County, but can also provide

appropriate alternatives to households that, due to a change in household composition or economic status, might otherwise have moved out.

The capture rates of the annual potential market used here fall within the target market methodology's parameters of feasibility.

NOTE: The target market capture rates of the potential purchaser or renter pool are a unique and highly-refined measure of feasibility. Target market capture rates are not equivalent to—and should not be confused with—penetration rates or traffic conversion rates.

The **target market capture rate** is derived by dividing the *annual* forecast absorption—in aggregate and by housing type—by the number of households that have the potential to purchase or rent new housing within a specified area *in a given year*.

The **penetration rate** is derived by dividing the *total* number of dwelling units planned for a property by the *total* number of draw area households, sometimes qualified by income.

The **traffic conversion rate** is derived by dividing the *total* number of buyers or renters by the *total* number of prospects that have visited a site.

Because the prospective market for a property or study area is more precisely defined using the residential target market methodology, a substantially smaller number of households are qualified; as a result, target market capture rates are higher than the more grossly-derived penetration rates. The resulting higher capture rates remain within the range of feasibility.

## BUILDING TYPES

### —MULTI-FAMILY BUILDINGS—

- **Courtyard Apartment Building**: In new construction, an urban-scale, pedestrian-oriented equivalent to conventional garden apartments. An urban courtyard building is at minimum three, and typically four or more stories, often combined with non-residential uses on the ground floor, or with a ground floor configured for later conversion from residential to retail use. The building should be built to the sidewalk edge and when the ground-floor serves a permanent residential use it should be elevated significantly above grade to provide privacy and a sense of security. Parking is either below grade, at grade behind or in a parking courtyard, or in an integral structure.
- **Loft Apartment Building**: A new-construction building type inspired by adaptive re-use of 19th century warehouse and manufacturing buildings. The building is usually elevator-served with double-loaded corridors, but a loft building can be as small as a two-story walk-up. Unit interiors typically have high ceilings and commercial windows and can be minimally finished, limited to architectural elements such as columns and pilasters, or unfinished, with no interior partitions except those for bathrooms.

The building's loft apartments can be leased, as in a conventional income property, or sold to individual buyers, under condominium or cooperative ownership, in which the owner pays a monthly maintenance fee in addition to the purchase price. New construction lofts, whether for-rent or for-sale, can include work space as a permitted use. (Loft apartments can also be incorporated into other multifamily building types along with conventionally-finished apartment units.)

- **Liner Building**: An apartment building with apartments and/or lofts lining two to four sides of a multi-story parking structure. Units are typically served from a single-loaded corridor that often includes access to parking. Ground floors typically include a traditional urban apartment lobby and can also include maisonette apartments, retail or some combination of the two.

- Mixed-Use Building: A pedestrian-oriented building, either attached or free-standing, with apartments and/or offices over flexible ground floor uses that can range from retail to office to residential.
- Mansion Apartment Building: A two- to three-story flexible-use structure with a street façade resembling a large detached or attached house (hence, “mansion”). The attached version of the mansion, typically built to a sidewalk on the front lot line, is most appropriate for downtown locations. Because of the small number of units, mansion buildings are particularly well-suited to condominium development since meeting pre-sales financing requirements is less challenging. The mansion building can also accommodate a variety of uses—from apartments, professional offices, any of these uses over ground-floor retail, a bed and breakfast inn, or a large single-family detached house—and its physical structure complements other buildings within a neighborhood.

Parking behind the mansion buildings can be either alley-loaded, or front-loaded served by shared drives. The form of the parking can be in open lots, in garages with units above, or integral to the building.

Mansion buildings should be strictly regulated in form, but flexible in use. However, flexibility in use is somewhat constrained by the handicapped accessibility regulations in both the Fair Housing Amendments Act and the Americans with Disabilities Act.

Mansion buildings can be grouped, alone or with other housing types, in pedestrian courts (*see Pedestrian Court below*).

—SINGLE-FAMILY ATTACHED—

- Rowhouses/townhouses: Similar in form to conventional suburban townhouses except that the garage—either attached or detached—or parking spaces are located to the rear of the unit and accessed from an alley or auto court. Unlike conventional townhouses, urban rowhouses/townhouses conform to the pattern of streets, typically with shallow front-yard setbacks. To provide privacy and a sense of security, the first floor should be elevated significantly above the sidewalk.

Townhouses can be grouped, alone or with other housing types, in pedestrian courts (*see Pedestrian Court below*).

- **Duplexes**: Two-unit side-by-side rowhouses/townhouses with the garages—either attached or detached—or parking spaces are located to the rear of the units. Like the rowhouses/townhouses, urban duplexes/triplexes conform to the pattern of streets, typically with shallow front-yard setbacks. In a corner location, duplex units can each front a different street.

As with townhouses, duplexes can be grouped, alone or with other housing types, in pedestrian courts (*see Pedestrian Court below*).

—SINGLE-FAMILY DETACHED—

- **Tiny Houses**: One-story detached houses, frequently manufactured off-site, with living area typically well under 500 square feet. Tiny houses are often grouped in pedestrian courts with parking in an open lot (*see Pedestrian Court below*). Tiny houses can also be used as accessory dwelling units (*see Accessory Dwelling Unit below*).
- **Cottages**: Small one-, one-and-a-half- or two-story single-family detached houses on small lots, usually with parking are located to the rear of the house and accessed from an alley or auto court.
- **Urban Houses**: Two- or three-story single-family detached houses on relatively-small lots, often, but not always with alley-loaded parking. Attached, detached, or open parking—whether alley-loaded or not—is set well back from the front façade.

—Miscellaneous Types—

- **Pedestrian Court**: Assuming regulations permit units that do not front a public vehicular right-of-way, attached and detached houses can be grouped in pedestrian courts facing a mews, small common, green or garden, shared through an owners' association. A pedestrian court is often, but not always, arranged in a U-shape. The units are separated

from the common area only by a sidewalk, path or other non-vehicular way. Parking is from rear lanes or alleys in attached or detached garages or open parking.

- Accessory Dwelling Unit: A small residential unit associated with a principal residence on a single lot. An accessory unit is typically located over the detached garage of a townhouse or detached house. Utilities for accessory units are not typically metered separately. Also known as “garage apartment,” “ancillary apartment,” “accessory apartment,” “granny flat,” “outbuilding” or “casita” when detached, and “backbuilding” when attached to the principal residence.



Table 1

**Annual Market Potential For New And Existing Housing Units**  
 Distribution Of Annual Average Number Of Draw Area Households With The Potential  
 To Move Within/To The Downtown Macon Study Area Each Year Over The Next Five Years  
 Based On Housing Preferences And Income Levels  
***The Downtown Macon Study Area***  
*Macon-Bibb County, Georgia*

*Macon-Bibb County; Jones and Monroe Counties, Georgia;  
 Houston County, Georgia; Balance of U.S.  
 Draw Areas*

|  |       |
|--|-------|
| Annual Number Of Households<br>With The Potential To Rent/Purchase Within<br>Macon-Bibb County                       | 9,540 |
| Annual Number Of Target Market Households<br>With Potential To Rent/Purchase Within<br>The Downtown Macon Study Area | 2,825 |

**Annual Market Potential**

|   | <u>Below<br/>30% AMI</u> | <u>30% to<br/>60% AMI</u> | <u>60% to<br/>80% AMI</u> | <u>80% to<br/>100% AMI</u> | <u>Above<br/>100% AMI</u> | <u>Subtotal</u> |
|---|--------------------------|---------------------------|---------------------------|----------------------------|---------------------------|-----------------|
| <i>Multi-Family For-Rent:</i>               | 466                      | 318                       | 193                       | 150                        | 657                       | <b>1,784</b>    |
| <i>Multi-Family For-Sale:</i>               | 49                       | 33                        | 21                        | 17                         | 99                        | <b>219</b>      |
| <i>Single-Family<br/>Attached For-Sale:</i> | 57                       | 38                        | 23                        | 20                         | 131                       | <b>269</b>      |
| <i>Single-Family<br/>Detached For-Sale:</i> | 89                       | 66                        | 51                        | 44                         | 303                       | <b>553</b>      |
| <b>Total:</b>                               | <b>661</b>               | <b>455</b>                | <b>288</b>                | <b>231</b>                 | <b>1,190</b>              | <b>2,825</b>    |
| <b>Percent:</b>                             | <b>23.4%</b>             | <b>16.1%</b>              | <b>10.2%</b>              | <b>8.2%</b>                | <b>42.1%</b>              | <b>100.0%</b>   |

Note: For fiscal year 2024, Macon-Bibb County, GA Metro Median Family Income for a family of four is \$70,700.

SOURCE: Claritas, Inc.;  
 Zimmerman/Volk Associates, Inc.

Table 2

### Annual Market Potential By Lifestage And Income Range

Derived From Purchase And Rental Propensities Of Draw Area Households With The Potential To Move Within/To The Downtown Macon Study Area Each Year Over The Next Five Years Based On Housing Preferences And Income Levels

### *The Downtown Macon Study Area*

*Macon-Bibb County, Georgia*

| Number of Households:                             | Total         | <i>Below 30% AMI</i> | <i>30% to 60% AMI</i> | <i>60% to 80% AMI</i> | <i>80% to 100% AMI</i> | <i>Above 100% AMI</i> |
|---|---------------|----------------------|-----------------------|-----------------------|------------------------|-----------------------|
|   |               | <b>2,825</b>         | <b>661</b>            | <b>455</b>            | <b>288</b>             | <b>231</b>            |
| <b>Empty Nesters &amp; Retirees</b>               | 31.2%         | 25.4%                | 27.9%                 | 26.7%                 | 27.3%                  | 37.4%                 |
| <b>Traditional &amp; Non-Traditional Families</b> | 15.0%         | 15.6%                | 9.2%                  | 16.7%                 | 17.7%                  | 16.0%                 |
| <b>Younger Singles &amp; Couples</b>              | 53.8%         | 59.0%                | 62.9%                 | 56.6%                 | 55.0%                  | 46.6%                 |
|   | <b>100.0%</b> | <b>100.0%</b>        | <b>100.0%</b>         | <b>100.0%</b>         | <b>100.0%</b>          | <b>100.0%</b>         |

Note: For fiscal year 2024, Macon-Bibb County, GA Metro Median Family Income for a family of four is \$70,700.

SOURCE: Claritas, Inc.;  
Zimmerman/Volk Associates, Inc.

**Summary Of Selected Rental Properties**  
*Macon-Bibb County, Georgia*  
**January, 2025**

| <u>Property (Date opened)</u><br><u>Address/Management/Walk score</u> | <u>Number/Type</u><br><u>of Units</u> | <u>Reported</u><br><u>Base Rent</u> | <u>Reported</u><br><u>Unit Size</u> | <u>Rent per</u><br><u>Sq. Ft.</u> | <u>Occupancy</u><br><u>Community amenities</u>                                   |
|---|---------------------------------------|-------------------------------------|-------------------------------------|-----------------------------------|--|
| <b>..... Downtown Macon .....</b>                                     |                                       |                                     |                                     |                                   |  |
| <b>Caswell at Katherine (1916)</b>                                    | <b>28</b>                             | <i>... Apartments ...</i>           |                                     |                                   | <b>96% occupancy</b>   |
| 855 Mulberry Street   | Studio/1ba                            | \$700 to                            | 480 to                              | \$1.29 to                         | Laundry facilities,<br>extra storage.  |
| 70 Walk score   |                                       | \$775                               | 600                                 | \$1.46                            |  |
|   | 1br/1ba                               | \$850 to                            | 550 to                              | \$0.92 to                         |  |
|   |                                       | \$1,150                             | 1,255                               | \$1.55                            |  |
|   | 1br/2ba                               | \$1,050                             | 1,177                               | \$0.89                            |  |
|   | 2br/1ba                               | \$1,275 to                          | 1,125 to                            | \$1.00 to                         |  |
|   |                                       | \$1,300                             | 1,296                               | \$1.13                            |  |
|   | 2br/2ba                               | \$1,350                             | 1,435                               | \$0.94                            |  |
|   | 3br/2ba                               | \$2,295                             | 2,075                               | \$1.11                            |  |
| <b>Caswell at The Terrace (1925)</b>                                  | <b>34</b>                             | <i>... Apartments ...</i>           |                                     |                                   | <b>100% occupancy</b>  |
| 876 Mulberry Street   | Studio/1ba                            | \$750 to                            | 345 to                              | \$1.50 to                         | Historic building,<br>gated electronic fence.                                    |
| Stout Ventures  |                                       | \$825                               | 550                                 | \$2.17                            |  |
| 74 Walk score   | 2br/1ba                               | \$975                               | 660                                 | \$1.48                            |  |
| <b>Brew House Lofts</b>   | <b>20</b>                             | <i>... Apartments ...</i>           |                                     |                                   | <b>95% occupancy</b>   |
| 452 2nd Street  | Studio/1ba                            | \$825                               | 358                                 | \$2.30                            | Historic Downtown Macon,<br>resident lounge.                                     |
| 77 Walk score   | 1br/1.5ba                             | \$1,050                             | 856                                 | \$1.23                            |  |
|   | 2br/1ba                               | \$1,395                             | 1,137                               | \$1.23                            |  |
| <b>Caswell at Lanier Park (1951)</b>                                  | <b>60</b>                             | <i>... Apartments ...</i>           |                                     |                                   | <b>85% occupancy</b>   |
| 365 New Street  | Studio/1ba                            | \$889 to                            | 300                                 | \$2.96 to                         | Package receiving.   |
| Stout Ventures  |                                       | \$890                               |                                     | \$2.97                            |  |
| 74 Walk score   | 1br/1ba                               | \$1,082 to                          | 475 to                              | \$2.22 to                         |  |
|   |                                       | \$1,111                             | 500                                 | \$2.28                            |  |
|   | 2br/1ba                               | \$1,189                             | 700                                 | \$1.70                            |  |
| <b>Johnson Lofts (2016)</b>   | <b>12</b>                             | <i>... Lofts ...</i>                |                                     |                                   | <b>100% occupancy</b>  |
| 555 Poplar Street   | Studio/1ba                            | \$950                               | 505                                 | \$1.88                            | Historic building,<br>conference rooms, coworking<br>offices, gathering kitchen. |
| NewTown Macon   |                                       |                                     |                                     |                                   |  |
| 77 Walk score   |                                       |                                     |                                     |                                   |  |
| <b>Market House Lofts (2023)</b>                                      | <b>9</b>                              | <i>... Lofts ...</i>                |                                     |                                   | <b>n/a</b>   |
| 614 Poplar Street   | Studio/1ba                            | \$1,075 to                          | 746 to                              | \$1.44 to                         | Vintage building.  |
| Real Property Mgmt Vesta  |                                       | \$1,250                             | 773                                 | \$1.62                            |  |
| 79 Walk score   |                                       |                                     |                                     |                                   |  |
| <b>Washington Lofts (2023)</b>  | <b>17</b>                             | <i>... Lofts ...</i>                |                                     |                                   | <b>88% occupancy</b>   |
| 582 Mulberry Street   | Studio/1ba                            | \$1,095                             | 524                                 | \$2.09                            | Vintage building,<br>storage space.  |
| Real Property Mgmt Vesta  | 1br/1ba                               | \$1,495                             | 678                                 | \$2.21                            |  |
| 72 Walk score   |                                       |                                     |                                     |                                   |  |

## Summary Of Selected Rental Properties

*Macon-Bibb County, Georgia*

**January, 2025**

| <u>Property (Date opened)</u><br><i>Address/Management/Walk score</i> | <u>Number/Type<br/>of Units</u> | <u>Reported<br/>Base Rent</u>      | <u>Reported<br/>Unit Size</u> | <u>Rent per<br/>Sq. Ft.</u>   | <u>Occupancy</u><br><i>Community amenities</i>   |
|---|---------------------------------|------------------------------------|-------------------------------|-------------------------------|--|
| <i>. . . . . Downtown Macon (continued) . . . . .</i>                 |                                 |                                    |                               |                               |  |
| <b>The Lofts at Silver (2016)</b><br><i>450 3rd Street</i>            | <b>23</b><br>1br/1ba            | ... Lofts ...<br>\$1,125           | to 700                        | \$1.61 to                     | <b>n/a</b><br><i>Vintage building,</i>   |
| Real Property Mgmt Vesta<br><i>75 Walk score</i>                      | 2br/2ba                         | \$1,195<br>\$1,525                 | 1,000                         | \$1.71<br>\$1.53              | <i>lounge,<br/>controlled access.</i>  |
| <b>Broadway Lofts (1911)</b><br><i>672-698 MLK Jr Boulevard</i>       | <b>87</b><br>Studio/1ba         | ... Lofts ...<br>\$1,150           | 855                           | \$1.35                        | <b>98% occupancy</b><br><i>Historic building,</i>  |
| TriBridg Residential<br><i>65 Walk score</i>                          | 1br/1ba<br>2br/2ba              | \$935<br>\$1,275 to<br>\$1,550     | 851<br>909 to<br>1,739        | \$1.10<br>\$0.89 to<br>\$1.40 | <i>laundry facility, package<br/>receiving, courtyard.</i>   |
| <b>The Lamar (1870; 2015)</b><br><i>562 Cherry Street</i>             | <b>34</b><br>1br/1ba            | ... Lofts ...<br>\$1,285           | 650 to                        | \$1.82 to                     | <b>80% occupancy</b><br><i>Lobby coffee bar,</i>   |
| The Lamar<br><i>74 Walk score</i>                                     | 2br/2ba                         | \$1,685                            | 705<br>1,100                  | \$1.98<br>\$1.53              | <i>Historic Downtown Macon,<br/>gated community, picnic area.</i>                                    |
| <b>Hemlock Lofts (2024)</b><br><i>805 MLK Jr Boulevard</i>            | <b>17</b><br>1br/1ba            | ... Lofts ...<br>\$1,325           | 640                           | \$2.07                        | <b>In lease-up</b><br><i>Fitness center,</i>   |
| Real Property Mgmt Vesta<br><i>56 Walk score</i>                      | 2br/2ba<br>3br/3ba              | \$1,895 to<br>\$2,450<br>\$2,700   | 1,280 to<br>1,920<br>1,920    | \$1.28 to<br>\$1.48<br>\$1.41 | <i>concierge, gated, multi-use<br/>room, storage space.</i>  |
| <b>Lofts at Capricorn (2018)</b><br><i>520 MLK Jr Boulevard</i>       | <b>137</b><br>1br/1ba           | ... Lofts ...<br>\$1,339 to        | 808                           | \$1.66 to                     | <b>97% occupancy</b><br><i>Infinity pool, fitness center,</i>  |
| Sierra Development<br><i>72 Walk score</i>                            | 2br/2ba                         | \$2,513<br>\$1,618 to<br>\$1,638   | 1,131                         | \$3.11<br>\$1.43 to<br>\$1.45 | <i>clubhouse, cyber café,<br/>coffee bar, grills,<br/>controlled access.</i>                         |
| <b>Prism 23 (2015)</b><br><i>1345 Hardeman Avenue</i>                 | <b>146</b><br>1br/1ba           | ... Student Housing ...<br>\$1,419 | 714                           | \$1.99                        | <b>n/a</b><br><i>Fitness center, clubhouse,</i>  |
| The Scion Group<br><i>67 Walk score</i>                               | 2br/2ba                         | \$1,938 to<br>\$2,018              | 973 to<br>1,122               | \$1.80 to<br>\$1.99           | <i>study rooms, rooftop<br/>terrace, grilling stations,<br/>fire pit, patrol, controlled access.</i> |
| <b>Lofts at Navicent (2017)</b><br><i>781 Spring Street</i>           | <b>60</b><br>1br/1ba            | ... Lofts ...<br>\$1,953           | 796                           | \$2.45                        | <b>97% occupancy</b><br><i>Clubhouse, controlled access,</i>   |
| Sierra Development<br><i>74 Walk score</i>                            | 2br/2ba                         | \$1,879                            | 1,092                         | \$1.72                        | <i>firepit, coffee bar, grills,<br/>fitness center, clubroom,<br/>dog park.</i>                      |

SOURCE: Zimmerman/Volk Associates, Inc.

**Summary Of Selected Rental Properties**  
*Macon-Bibb County, Georgia*  
**January, 2025**

| <u>Property (Date opened)</u><br><i>Address/Management/Walk score</i> | <u>Number/Type</u><br><u>of Units</u> | <u>Reported</u><br><u>Base Rent</u>       | <u>Reported</u><br><u>Unit Size</u> | <u>Rent per</u><br><u>Sq. Ft.</u> | <u>Occupancy</u><br><u>Community amenities</u>  |
|---|---------------------------------------|---|-------------------------------------|-----------------------------------|---|
| <i>..... City of Macon .....</i>                                      |                                       |   |                                     |                                   |   |
| <b>The Park at 4690 (1973)</b>  | <b>100</b>                            | <i>... Apartments ...</i>                 |                                     |                                   | <b>97% occupancy</b>  |
| 4690 Log Cabin Drive  | 1br/1ba                               | \$750                                     | 600                                 | \$1.25                            | <i>Laundry facilities,<br/>playground.</i>  |
| Woodruff Property Mgmt Co   |                                       | <i>... Townhouses ...</i>                 |                                     |                                   |   |
| 56 Walk score   | 2br/1.5ba                             | \$999                                     | 1,015                               | \$0.98                            |   |
| <i>..... Bibb County .....</i>  |                                       |   |                                     |                                   |   |
| <b>Northwood (1996: 2012)</b>   | <b>220</b>                            | <i>... Apartments ...</i>                 |                                     |                                   | <b>99% occupancy</b>  |
| 6229 Thomaston Road   | 1br/1ba                               | \$1,066                                   | 976                                 | \$1.09                            | <i>Pool, cabana, fitness center,<br/>clothing care center,<br/>sports court, auto detail<br/>center, business center,<br/>courtyard, picnic area,<br/>dog park, playground.</i>             |
| HighMark Residential  |                                       | \$1,147                                   | 977                                 | \$1.17                            |   |
| 3 Walk score  | 2br/2ba                               | \$1,104                                   | 1,310                               | \$0.84                            |   |
| <b>Riverstone (2012)</b>  | <b>220</b>                            | <i>... Apartments ...</i>                 |                                     |                                   | <b>99% occupancy</b>  |
| 3990 Riverside Park Boulevard   | 1br/1ba                               | \$1,210                                   | 850                                 | \$1.42                            | <i>Pool, clubhouse, business<br/>center, fitness center,<br/>lounge, grilling area,<br/>pet park, car care center,<br/>controlled access, playground,<br/>social activities, fireplace.</i> |
| Allegiant Carter Mgmt   |                                       | \$1,295                                   |                                     | \$1.52                            |   |
| 13 Walk score   | 2br/2ba                               | \$1,430                                   | 1,240                               | \$1.13                            |   |
|   | 3br/2ba                               | \$1,530                                   | 1,360                               | \$1.15                            |   |
|   |                                       | \$1,459                                   | 1,440                               | \$1.01                            |   |
|   |                                       | \$1,719                                   |                                     | \$1.19                            |   |
|   |                                       | <i>... Apartments with Great Room ...</i> |                                     |                                   |   |
|   | 1br/1ba                               | \$1,265                                   | 990                                 | \$1.28                            |   |
|   | 2br/1ba                               | \$1,135                                   | 1,326                               | \$0.86                            |   |
|   |                                       | \$1,428                                   |                                     | \$1.08                            |   |
|   | 2br/2ba                               | \$1,360                                   | 1,390                               | \$0.96                            |   |
|   |                                       | \$1,440                                   | 1,495                               | \$0.98                            |   |
|   | 3br/2ba                               | \$1,424                                   | 1,590                               | \$0.90                            |   |
|   |                                       | \$1,449                                   |                                     | \$0.91                            |   |
| <b>Lofts at Bass (2014)</b>   | <b>82</b>                             | <i>... Lofts ...</i>                      |                                     |                                   | <b>94% occupancy</b>  |
| 5437 Bowman Road  | 1br/1ba                               | \$1,247                                   | 826                                 | \$1.51                            | <i>Fitness center,<br/>firepit, coffee bar,<br/>clubhouse, package room,<br/>saltwater pool, sundeck,<br/>grills, cabana areas,<br/>secured access, dog park.</i>                           |
| Sierra Property Mgmt  |                                       | \$1,644                                   | 991                                 | \$1.66                            |   |
| 41 Walk score   | 2br/2ba                               | \$1,668                                   | 1,100                               | \$1.52                            |   |
|   |                                       | \$2,311                                   | 1,108                               | \$2.09                            |   |

## Summary Of Selected Rental Properties

*Macon-Bibb County, Georgia*

**January, 2025**

| <u>Property (Date opened)</u><br><i>Address/Management/Walk score</i> | <u>Number/Type</u><br><i>of Units</i> | <u>Reported</u><br><i>Base Rent</i> | <u>Reported</u><br><i>Unit Size</i> | <u>Rent per</u><br><i>Sq. Ft.</i> | <u>Occupancy</u><br><i>Community amenities</i>      |
|---|---------------------------------------|-------------------------------------|-------------------------------------|-----------------------------------|---|
| <b>..... Bibb County (continued).....</b>                             |                                       |                                     |                                     |                                   |   |
| <b>Thomaston Crossing (2014)</b>                                      | <b>250</b>                            | <i>... Apartments ...</i>           |                                     |                                   | <b>97% occupancy</b>                                |
| 5744 Thomaston Road   | 1br/1ba                               | \$1,250                             | 910                                 | \$1.37                            | Laundry facility,                                   |
| Pegasus Residential   | 2br/2ba                               | \$1,375 to                          | 1,100 to                            | \$1.25 to                         | pet park, carwash station,                          |
| 21 Walk score   |                                       | \$1,450                             | 1,150                               | \$1.26                            | fitness center,                                     |
|   | 3br/2ba                               | \$1,600 to                          | 1,360                               | \$1.18 to                         | business center,                                    |
|   |                                       | \$1,750                             |                                     | \$1.29                            | pool, cabanas, grilling stations, gated.            |
| <b>Pointe Grand Macon (2023)</b>                                      | <b>276</b>                            | <i>... Apartments ...</i>           |                                     |                                   | <b>In lease-up</b>                                  |
| 5560 Riverside Drive  | 2br/2ba                               | \$1,299 to                          | 1,170                               | \$1.11 to                         | Pool, cabanas, fitness center, bark park, pet       |
| Hillpointe, LLC   |                                       | \$1,333                             |                                     | \$1.14                            | washing station, clubhouse,                         |
| 6 Walk score  |                                       |                                     |                                     |                                   | business center, picnic area, firepit, EV charging. |
| <b>Lofts at Zebulon (2019)</b>  | <b>247</b>                            | <i>... Lofts ...</i>                |                                     |                                   | <b>96% occupancy</b>                                |
| 5801 Zebulon Road   | 1br/1ba                               | \$1,315 to                          | 794 to                              | \$1.05 to                         | Fitness center, car care                            |
| Northland   |                                       | \$1,855                             | 1,765                               | \$1.66                            | center, saltwater infinity pool,                    |
| 47 Walk score   | 2br/2ba                               | \$1,585 to                          | 1,062 to                            | \$1.09 to                         | clubhouse, trails, lounge,                          |
|   |                                       | \$2,365                             | 2,168                               | \$1.49                            | cabana, dog park, EV charging,                      |
|   | 3br/2ba                               | \$1,795 to                          | 1,374                               | \$1.31 to                         | pet wash station, gas grilling.                     |
|   |                                       | \$1,835                             |                                     | \$1.34                            |   |
| <b>Wembly at Overlook (2012)</b>                                      | <b>238</b>                            | <i>... Lofts ...</i>                |                                     |                                   | <b>97% occupancy</b>                                |
| 1091 Overlook Parkway   | 1br/1ba                               | \$1,337 to                          | 887                                 | \$1.51 to                         | Pool, gated entry, bark park,                       |
| HomeCorp  |                                       | \$1,363                             |                                     | \$1.54                            | BBQ & picnic areas, media                           |
| 13 Walk score   | 2br/2ba                               | \$1,365 to                          | 1,139 to                            | \$1.18 to                         | room, gazebo, volleyball                            |
|   |                                       | \$1,429                             | 1,213                               | \$1.20                            | court, clubhouse, coffee bar,                       |
|   | 3br/2ba                               | \$1,641 to                          | 1,391                               | \$1.18 to                         | fitness center, car washing                         |
|   |                                       | \$1,691                             |                                     | \$1.22                            | station, playground.                                |
| <b>Bowman Station (2018)</b>  | <b>240</b>                            | <i>... Apartments ...</i>           |                                     |                                   | <b>97% occupancy</b>                                |
| 5235 Bowman Road  | 1br/1ba                               | \$1,338 to                          | 850 to                              | \$1.39 to                         | Controlled access, business                         |
| Pegasus Residential   |                                       | \$1,378                             | 991                                 | \$1.57                            | center, clubhouse, social                           |
| 5 Walk score  | 2br/1ba                               | \$1,490 to                          | 1,326                               | \$1.12 to                         | room, conference room,                              |
|   |                                       | \$1,519                             |                                     | \$1.15                            | fitness center, pool,                               |
|   | 2br/2ba                               | \$1,475 to                          | 1,237 to                            | \$1.08 to                         | playground, media center,                           |
|   |                                       | \$1,609                             | 1,493                               | \$1.19                            | sundeck, gated                                      |
|   | 3br/2ba                               | \$1,804                             | 1,437                               | \$1.26                            | community, grills.                                  |

SOURCE: Zimmerman/Volk Associates, Inc.

**Summary Of Selected For-Sale Multi-Family  
And Single-Family Attached Listings**

*Macon-Bibb County, Georgia*

**January, 2025**

| <u>Property (Year Built)</u><br><u>Address/Walk Score</u>                   | <u>Unit Type</u> | <u>Asking Price</u> | <u>Unit Size</u> | <u>Asking Price</u><br><u>Per Sq. Ft.</u> |
|---|------------------|---------------------|------------------|---|
| <i>..... Downtown Macon .....</i>   |                  |                     |                  |   |
| <i>..... Resale Listings .....</i>  |                  |                     |                  |   |
| <i>..... Townhouse .....</i>  |                  |                     |                  |   |
| 945 Walnut Street (c1860)<br>7 Walk Score                                   | 3br/3.5ba        | \$275,000           | 2,948            | \$93                                      |
| <i>..... Condominium .....</i>  |                  |                     |                  |   |
| 544 Orange Street (c1900)<br>8 Walk Score                                   | Unit 4 2br/2ba   | \$475,000           | 1,615            | \$294                                     |
| <i>..... City of Macon .....</i>  |                  |                     |                  |   |
| <i>..... Resale Listings .....</i>  |                  |                     |                  |   |
| <i>..... Townhouse .....</i>  |                  |                     |                  |   |
| Barrington Place (1987)<br>4388 Barrington Place<br>10 Walk score           | 2br/1.5ba        | \$138,000           | 1,036            | \$133                                     |
| <i>..... Condominium .....</i>  |                  |                     |                  |   |
| Robin Lyn Condominiums (1966).<br>2263 Robin Lyn Court<br>53 Walk score     | 2br/2.5ba        | \$145,000           | 1,560            | \$93                                      |
| <i>..... Townhouse .....</i>  |                  |                     |                  |   |
| Wolf Creek Run (1984)<br>149 Windermere Circle<br>11 Walk Score             | 2br/1.5ba        | \$158,000           | 1,136            | \$139                                     |
| <i>..... Townhouse .....</i>  |                  |                     |                  |   |
| Willow Creek Condominiums (1973)<br>619 Willow Creek Drive<br>10 Walk Score | 3br/2ba          | \$159,000           | 1,428            | \$111                                     |
| <i>..... Townhouse .....</i>  |                  |                     |                  |   |
| Richland Estates (1984)<br>1391 Briarcliff Road, unit 4A                    | 2br/2.5ba        | \$169,900           | 2,419            | \$70                                      |

**Summary Of Selected For-Sale Multi-Family  
And Single-Family Attached Listings**

*Macon-Bibb County, Georgia*

**January, 2025**

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| <u>Property (Year Built)</u><br><u>Address/Walk Score</u> | <u>Unit Type</u>                      | <u>Asking Price</u> | <u>Unit Size</u> | <u>Asking Price<br/>Per Sq. Ft.</u> |
|---|---------------------------------------|---------------------|------------------|-------------------------------------|
| <i>. . . . . Bibb County . . . . .</i>                    |                                       |                     |                  |                                     |
| <i>. . . . . New Construction Listings . . . . .</i>      |                                       |                     |                  |                                     |
| Goodall Woods (2024)                                      | <i>. . . . . Townhouses . . . . .</i> |                     |                  |                                     |
| <i>Alayna &amp; Haylie Court</i>                          | <i>103 Alayna Ct</i>                  | <i>4br/2.5ba</i>    | <i>\$265,990</i> | <i>2,000</i>                        |
| <i>0 Walk Score</i>                                       | <i>102 Haylie Ct</i>                  | <i>4br/2.5ba</i>    | <i>\$266,490</i> | <i>2,000</i>                        |
|   | <i>112 Alayna Ct</i>                  | <i>4br/2.5ba</i>    | <i>\$271,990</i> | <i>2,050</i>                        |
|   | <i>108 Alayna Ct</i>                  | <i>4br/2.5ba</i>    | <i>\$274,490</i> | <i>2,050</i>                        |
| Madison (2024)  | <i>. . . . . Townhouse . . . . .</i>  |                     |                  |                                     |
| <i>422 Cliffstone Ct</i>                                  | <i>3br/2ba</i>                        | <i>\$425,000</i>    | <i>n/a</i>       | <i>n/a</i>                          |
| <i>6 Walk score</i>                                       |                                       |                     |                  |                                     |
| <i>. . . . . Resale Listing . . . . .</i>                 |                                       |                     |                  |                                     |
| Wellington (2000)   | <i>. . . . . Townhouse . . . . .</i>  |                     |                  |                                     |
| <i>120 North Wellington</i>                               | <i>2br/2ba</i>                        | <i>\$307,500</i>    | <i>1,875</i>     | <i>\$164</i>                        |
| <i>4 Walk score</i>                                       |                                       |                     |                  |                                     |

Table 5

**Summary of Selected Single-Family Detached Houses  
New Construction and Resale Listings**

*Macon-Bibb County, Georgia*

**January, 2025**

| <u>Property (Year Built)</u><br><u>Address/Walk Score</u>   | <u>Lot</u><br><u>Size</u>           | <u>Unit</u><br><u>Type</u> | <u>Asking Price</u> | <u>Unit Size</u> | <u>Asking Price</u><br><u>Per Sq. Ft.</u> | <u>Walk</u><br><u>Score</u> |
|---|-------------------------------------|----------------------------|---------------------|------------------|---|-----------------------------|
| <i>. . . Individual New Construction Listings . . .</i>     |                                     |                            |                     |                  |   |                             |
| 180 Ward Street (2021)                                      | 0.13 ac.                            | 2br/1ba                    | \$150,000           | 704              | \$213                                     | 36                          |
| 1963 3rd Avenue (2023)                                      | 0.09 ac.                            | 2br/2ba                    | \$160,000           | 1,002            | \$160                                     | 33                          |
| 277 Pierce Avenue (2024)                                    | 0.36 ac.                            | 2br/2ba                    | \$379,900           | 1,962            | \$194                                     | 34                          |
| <b>Lincoln Heights (2024)</b>                               | <i>. . . New Construction . . .</i> |                            |                     |                  |   |                             |
| 2294 Monroe Avenue  | 0.13 ac.                            | 3br/2ba                    | \$170,000           | 1,159            | \$147                                     | 58                          |
| <b>Log Cabin Drive (2025)</b>                               | <i>. . . New Construction . . .</i> |                            |                     |                  |   |                             |
| 114 Emily Street  | 0.22 ac.                            | 3br/2ba                    | \$170,000           | 1,159            | \$147                                     | 7                           |
| 115 Emily Street  | 0.14 ac.                            | 3br/2ba                    | \$170,000           | 1,159            | \$147                                     | 7                           |
| <b>The Highlands (2021)/<br/>Highland Plantation (2022)</b> | <i>. . . Resale Listings . . .</i>  |                            |                     |                  |   |                             |
| 111 Autumn Leaves Lane                                      | 0.14 ac.                            | 3br/2.5ba                  | \$218,000           | 2,069            | \$105                                     | 3                           |
| 124 Poplar Pass   | 0.12 ac.                            | 3br/2.5ba                  | \$219,900           | 1,652            | \$133                                     | 3                           |
| 117 Cold Creek Parkway                                      | 0.18 ac.                            | 3br/2.5ba                  | \$225,000           | 1,594            | \$141                                     | 10                          |
| 124 Cold Creek Parkway                                      | 0.12 ac.                            | 4br/3ba                    | \$225,000           | 1,811            | \$124                                     | 6                           |
| 212 Hawthorn Trail  | 0.10 ac.                            | 3br/2.5ba                  | \$234,500           | 1,614            | \$145                                     | 6                           |
| 114 Poplar Pass   | 0.12 ac.                            | 4br/2.5ba                  | \$238,500           | 2,000            | \$119                                     | 3                           |
| <b>Ingleside Woods (2024)</b>                               | <i>. . . New Construction . . .</i> |                            |                     |                  |   |                             |
| 126 Sugarloaf Circle  | 0.24 ac.                            | 3br/2ba                    | \$350,000           | 2,023            | \$173                                     | 7                           |
| <b>Wimbish Hills (2024)</b>                                 | <i>. . . New Construction . . .</i> |                            |                     |                  |   |                             |
| 635 Wimbish Road  | 0.33 ac.                            | 3br/2.5ba                  | \$360,000           | 2,182            | \$165                                     | 7                           |

**Target Groups For New Multi-Family For-Rent**  
***The Downtown Macon Study Area***  
*Macon-Bibb County, Georgia*

. . . . . *Number of Households* . . . . .

| <b>Empty Nesters<br/>&amp; Retirees**</b> | <i>60% to<br/>80% AMI†</i> | <i>80% to<br/>100% AMI†</i> | <i>Above<br/>100% AMI†</i> | <i>Total</i> | <i>Percent of<br/>Total</i> |
|---|----------------------------|-----------------------------|----------------------------|--------------|-----------------------------|
| Affluent Empty Nesters                    | 0                          | 0                           | 1                          | 1            | 0.1%                        |
| The One Percenters                        | 0                          | 0                           | 1                          | 1            | 0.1%                        |
| Old Money                                 | 0                          | 0                           | 2                          | 2            | 0.2%                        |
| The Social Register                       | 0                          | 0                           | 2                          | 2            | 0.2%                        |
| Small-Town Patriarchs                     | 0                          | 0                           | 7                          | 7            | 0.7%                        |
| New Empty Nesters                         | 0                          | 0                           | 3                          | 3            | 0.3%                        |
| Urban Establishment                       | 2                          | 2                           | 22                         | 26           | 2.6%                        |
| Pillars of the Community                  | 0                          | 0                           | 6                          | 6            | 0.6%                        |
| Second City Establishment                 | 0                          | 0                           | 3                          | 3            | 0.3%                        |
| Mainstream Empty Nesters                  | 2                          | 2                           | 16                         | 20           | 2.0%                        |
| Multi-Ethnic Empty Nesters                | 1                          | 1                           | 4                          | 6            | 0.6%                        |
| Middle-American Retirees                  | 2                          | 2                           | 20                         | 24           | 2.4%                        |
| Cosmopolitan Couples                      | 3                          | 3                           | 21                         | 27           | 2.7%                        |
| Blue-Collar Retirees                      | 3                          | 3                           | 13                         | 19           | 1.9%                        |
| Middle-Class Move-Downs                   | 1                          | 0                           | 2                          | 3            | 0.3%                        |
| Hometown Seniors                          | 4                          | 3                           | 5                          | 12           | 1.2%                        |
| Second City Seniors                       | 23                         | 16                          | 32                         | 71           | 7.1%                        |
| Subtotal:                                 | 41                         | 32                          | 160                        | 233          | 23.3%                       |

† For fiscal year 2024, Macon-Bibb County, GA Metro Median Family Income for a family of four is \$70,700.

\*\* Predominantly one- and two-person households.

SOURCE: Claritas, Inc.;  
Zimmerman/Volk Associates, Inc.

**Target Groups For New Multi-Family For-Rent**  
***The Downtown Macon Study Area***  
*Macon-Bibb County, Georgia*

. . . . . *Number of Households* . . . . .

| <b>Traditional &amp;<br/>Non-Traditional Families††</b> | <i>60% to<br/>80% AMI†</i> | <i>80% to<br/>100% AMI†</i> | <i>Above<br/>100% AMI†</i> | <i>Total</i> | <i>Percent of<br/>Total</i> |
|---|----------------------------|-----------------------------|----------------------------|--------------|-----------------------------|
| Corporate Establishment                                 | 0                          | 0                           | 1                          | 1            | 0.1%                        |
| e-Type Families   | 0                          | 0                           | 3                          | 3            | 0.3%                        |
| Nouveau Money   | 0                          | 0                           | 2                          | 2            | 0.2%                        |
| Button-Down Families                                    | 0                          | 0                           | 3                          | 3            | 0.3%                        |
| Unibox Transferees                                      | 0                          | 0                           | 5                          | 5            | 0.5%                        |
| Fiber-Optic Families                                    | 0                          | 0                           | 1                          | 1            | 0.1%                        |
| Late-Nest Suburbanites                                  | 1                          | 1                           | 9                          | 11           | 1.1%                        |
| Multi-Ethnic Families                                   | 2                          | 2                           | 9                          | 13           | 1.3%                        |
| Uptown Families   | 2                          | 3                           | 11                         | 16           | 1.6%                        |
| Multi-Cultural Families                                 | 0                          | 1                           | 3                          | 4            | 0.4%                        |
| Inner-City Families                                     | 4                          | 3                           | 11                         | 18           | 1.8%                        |
| Single-Parent Families                                  | 2                          | 2                           | 6                          | 10           | 1.0%                        |
| In-Town Families  | 4                          | 3                           | 4                          | 11           | 1.1%                        |
| New American Strivers                                   | 10                         | 6                           | 7                          | 23           | 2.3%                        |
| Subtotal:   | 25                         | 21                          | 75                         | 121          | 12.1%                       |

† For fiscal year 2024, Macon-Bibb County, GA Metro Median Family Income for a family of four is \$70,700.

†† Predominantly three- to five-person households.

SOURCE: Claritas, Inc.;  
Zimmerman/Volk Associates, Inc.

**Target Groups For New Multi-Family For-Rent**  
***The Downtown Macon Study Area***  
*Macon-Bibb County, Georgia*

. . . . . *Number of Households* . . . . .

| <b>Younger<br/>Singles &amp; Couples**</b> | <i>60% to<br/>80% AMI†</i> | <i>80% to<br/>100% AMI†</i> | <i>Above<br/>100% AMI†</i> | <i>Total</i>  | <i>Percent of<br/>Total</i> |
|--|----------------------------|-----------------------------|----------------------------|---------------|-----------------------------|
| New Power Couples                          | 0                          | 0                           | 8                          | 8             | 0.8%                        |
| New Bohemians                              | 5                          | 5                           | 70                         | 80            | 8.0%                        |
| Cosmopolitan Elite                         | 0                          | 0                           | 4                          | 4             | 0.4%                        |
| The VIPs                                   | 6                          | 6                           | 55                         | 67            | 6.7%                        |
| Fast-Track Professionals                   | 7                          | 7                           | 75                         | 89            | 8.9%                        |
| Suburban Achievers                         | 1                          | 1                           | 5                          | 7             | 0.7%                        |
| Small-City Singles                         | 6                          | 5                           | 12                         | 23            | 2.3%                        |
| Suburban Strivers                          | 8                          | 6                           | 14                         | 28            | 2.8%                        |
| Downtown Couples                           | 5                          | 4                           | 18                         | 27            | 2.7%                        |
| Twentysomethings                           | 23                         | 17                          | 42                         | 82            | 8.2%                        |
| Second-City Strivers                       | 16                         | 12                          | 27                         | 55            | 5.5%                        |
| Downtown Proud                             | 9                          | 8                           | 39                         | 56            | 5.6%                        |
| Multi-Ethnic Singles                       | 41                         | 26                          | 53                         | 120           | 12.0%                       |
| Subtotal:                                  | 127                        | 97                          | 422                        | 646           | 64.6%                       |
| <b>Total Households:</b>                   | <b>193</b>                 | <b>150</b>                  | <b>657</b>                 | <b>1,000</b>  | <b>100.0%</b>               |
| <b>Percent of Total:</b>                   | <b>19.3%</b>               | <b>15.0%</b>                | <b>65.7%</b>               | <b>100.0%</b> |                             |

† For fiscal year 2024, Macon-Bibb County, GA Metro Median Family Income for a family of four is \$70,700.

\*\* Predominantly one- and two-person households.

SOURCE: Claritas, Inc.;  
Zimmerman/Volk Associates, Inc.

**Target Groups For New Multi-Family For-Sale**  
***The Downtown Macon Study Area***  
*Macon-Bibb County, Georgia*

. . . . . *Number of Households* . . . . .

| <b>Empty Nesters<br/>&amp; Retirees**</b> | <i>60% to<br/>80% AMI†</i> | <i>80% to<br/>100% AMI†</i> | <i>Above<br/>100% AMI†</i> | <i>Total</i> | <i>Percent<br/>of Total</i> |
|---|----------------------------|-----------------------------|----------------------------|--------------|-----------------------------|
| Old Money                                 | 0                          | 0                           | 1                          | 1            | 0.7%                        |
| The Social Register                       | 0                          | 0                           | 1                          | 1            | 0.7%                        |
| Small-Town Patriarchs                     | 0                          | 0                           | 3                          | 3            | 2.2%                        |
| New Empty Nesters                         | 0                          | 0                           | 1                          | 1            | 0.7%                        |
| Urban Establishment                       | 0                          | 0                           | 5                          | 5            | 3.6%                        |
| Pillars of the Community                  | 0                          | 0                           | 1                          | 1            | 0.7%                        |
| Second City Establishment                 | 0                          | 0                           | 1                          | 1            | 0.7%                        |
| Mainstream Empty Nesters                  | 1                          | 1                           | 2                          | 4            | 2.9%                        |
| Multi-Ethnic Empty Nesters                | 0                          | 0                           | 2                          | 2            | 1.5%                        |
| Middle-American Retirees                  | 1                          | 1                           | 6                          | 8            | 5.8%                        |
| Cosmopolitan Couples                      | 0                          | 0                           | 3                          | 3            | 2.2%                        |
| Blue-Collar Retirees                      | 1                          | 1                           | 2                          | 4            | 2.9%                        |
| Middle-Class Move-Downs                   | 0                          | 0                           | 2                          | 2            | 1.5%                        |
| Hometown Seniors                          | 1                          | 1                           | 1                          | 3            | 2.2%                        |
| Second City Seniors                       | 3                          | 2                           | 5                          | 10           | 7.3%                        |
| Subtotal:                                 | 7                          | 6                           | 36                         | 49           | 35.8%                       |

† For fiscal year 2024, Macon-Bibb County, GA Metro Median Family Income for a family of four is \$70,700.

\*\* Predominantly one- and two-person households.

SOURCE: Claritas, Inc.;  
Zimmerman/Volk Associates, Inc.

**Target Groups For New Multi-Family For-Sale**  
***The Downtown Macon Study Area***  
*Macon-Bibb County, Georgia*

. . . . . *Number of Households* . . . . .

| <b>Traditional &amp;<br/>Non-Traditional Families††</b> | <i>60% to<br/>80% AMI†</i> | <i>80% to<br/>100% AMI†</i> | <i>Above<br/>100% AMI†</i> | <i>Total</i> | <i>Percent<br/>of Total</i> |
|---|----------------------------|-----------------------------|----------------------------|--------------|-----------------------------|
| Corporate Establishment<br>e-Type Families              | 0                          | 0                           | 1                          | 1            | 0.7%                        |
| Nouveau Money   | 0                          | 0                           | 1                          | 1            | 0.7%                        |
| Button-Down Families                                    | 0                          | 0                           | 1                          | 1            | 0.7%                        |
| Unibox Transferees                                      | 0                          | 0                           | 1                          | 1            | 0.7%                        |
| Late-Nest Suburbanites                                  | 0                          | 0                           | 3                          | 3            | 2.2%                        |
| Multi-Ethnic Families                                   | 0                          | 0                           | 3                          | 3            | 2.2%                        |
| Uptown Families   | 0                          | 0                           | 3                          | 3            | 2.2%                        |
| Multi-Cultural Families                                 | 0                          | 0                           | 1                          | 1            | 0.7%                        |
| Inner-City Families                                     | 1                          | 0                           | 1                          | 2            | 1.5%                        |
| Single-Parent Families                                  | 0                          | 0                           | 1                          | 1            | 0.7%                        |
| In-Town Families  | 1                          | 0                           | 0                          | 1            | 0.7%                        |
| New American Strivers                                   | 1                          | 1                           | 1                          | 3            | 2.2%                        |
| Subtotal:   | 3                          | 1                           | 18                         | 22           | 16.0%                       |

† For fiscal year 2024, Macon-Bibb County, GA Metro Median Family Income for a family of four is \$70,700.

†† Predominantly three- to five-person households.

SOURCE: Claritas, Inc.;  
Zimmerman/Volk Associates, Inc.

**Target Groups For New Multi-Family For-Sale**  
***The Downtown Macon Study Area***  
*Macon-Bibb County, Georgia*

. . . . . *Number of Households* . . . . .

| <b>Younger<br/>Singles &amp; Couples**</b> | <i>60% to<br/>80% AMI†</i> | <i>80% to<br/>100% AMI†</i> | <i>Above<br/>100% AMI†</i> | <i>Total</i>  | <i>Percent<br/>of Total</i> |
|--|----------------------------|-----------------------------|----------------------------|---------------|-----------------------------|
| New Power Couples                          | 0                          | 0                           | 2                          | 2             | 1.5%                        |
| New Bohemians                              | 1                          | 1                           | 8                          | 10            | 7.3%                        |
| Cosmopolitan Elite                         | 0                          | 0                           | 2                          | 2             | 1.5%                        |
| The VIPs                                   | 1                          | 1                           | 10                         | 12            | 8.8%                        |
| Fast-Track Professionals                   | 0                          | 0                           | 5                          | 5             | 3.6%                        |
| Suburban Achievers                         | 0                          | 0                           | 2                          | 2             | 1.5%                        |
| Small-City Singles                         | 1                          | 1                           | 2                          | 4             | 2.9%                        |
| Suburban Strivers                          | 1                          | 1                           | 2                          | 4             | 2.9%                        |
| Downtown Couples                           | 1                          | 1                           | 3                          | 5             | 3.6%                        |
| Twentysomethings                           | 1                          | 1                           | 2                          | 4             | 2.9%                        |
| Second-City Strivers                       | 1                          | 1                           | 1                          | 3             | 2.2%                        |
| Downtown Proud                             | 1                          | 1                           | 2                          | 4             | 2.9%                        |
| Multi-Ethnic Singles                       | 3                          | 2                           | 4                          | 9             | 6.6%                        |
| Subtotal:                                  | 11                         | 10                          | 45                         | 66            | 48.2%                       |
| <b>Total Households:</b>                   | <b>21</b>                  | <b>17</b>                   | <b>99</b>                  | <b>137</b>    | <b>100.0%</b>               |
| <b>Percent of Total:</b>                   | <b>15.3%</b>               | <b>12.4%</b>                | <b>72.3%</b>               | <b>100.0%</b> |                             |

† For fiscal year 2024, Macon-Bibb County, GA Metro Median Family Income for a family of four is \$70,700.

\*\* Predominantly one- and two-person households.

SOURCE: Claritas, Inc.;  
Zimmerman/Volk Associates, Inc.

**Target Groups For New Single-Family Attached For-Sale**  
***The Downtown Macon Study Area***  
*Macon-Bibb County, Georgia*

. . . . . *Number of Households* . . . . .

| <b>Empty Nesters<br/>&amp; Retirees**</b> | <i>60% to<br/>80% AMI†</i> | <i>80% to<br/>100% AMI†</i> | <i>Above<br/>100% AMI†</i> | <i>Total</i> | <i>Percent<br/>of Total</i> |
|---|----------------------------|-----------------------------|----------------------------|--------------|-----------------------------|
| Affluent Empty Nesters                    | 0                          | 0                           | 1                          | 1            | 0.6%                        |
| The One Percenters                        | 0                          | 0                           | 1                          | 1            | 0.6%                        |
| Old Money                                 | 0                          | 0                           | 1                          | 1            | 0.6%                        |
| The Social Register                       | 0                          | 0                           | 1                          | 1            | 0.6%                        |
| Small-Town Patriarchs                     | 0                          | 0                           | 6                          | 6            | 3.4%                        |
| New Empty Nesters                         | 0                          | 0                           | 2                          | 2            | 1.1%                        |
| Urban Establishment                       | 0                          | 0                           | 4                          | 4            | 2.3%                        |
| Pillars of the Community                  | 0                          | 0                           | 4                          | 4            | 2.3%                        |
| Second City Establishment                 | 0                          | 0                           | 2                          | 2            | 1.1%                        |
| Mainstream Empty Nesters                  | 1                          | 1                           | 7                          | 9            | 5.2%                        |
| Multi-Ethnic Empty Nesters                | 0                          | 0                           | 4                          | 4            | 2.3%                        |
| Middle-American Retirees                  | 1                          | 1                           | 10                         | 12           | 6.9%                        |
| Cosmopolitan Couples                      | 0                          | 0                           | 2                          | 2            | 1.1%                        |
| Blue-Collar Retirees                      | 1                          | 1                           | 5                          | 7            | 4.0%                        |
| Middle-Class Move-Downs                   | 0                          | 0                           | 2                          | 2            | 1.1%                        |
| Hometown Seniors                          | 1                          | 1                           | 1                          | 3            | 1.7%                        |
| Second City Seniors                       | 2                          | 1                           | 4                          | 7            | 4.0%                        |
| Subtotal:                                 | 6                          | 5                           | 57                         | 68           | 39.1%                       |

† For fiscal year 2024, Macon-Bibb County, GA Metro Median Family Income for a family of four is \$70,700.

\*\* Predominantly one- and two-person households.

SOURCE: Claritas, Inc.;  
Zimmerman/Volk Associates, Inc.

**Target Groups For New Single-Family Attached For-Sale**  
***The Downtown Macon Study Area***  
*Macon-Bibb County, Georgia*

. . . . . Number of Households . . . . .

| <b>Traditional &amp;<br/>Non-Traditional Families††</b> | <i>60% to<br/>80% AMI†</i> | <i>80% to<br/>100% AMI†</i> | <i>Above<br/>100% AMI†</i> | <i>Total</i> | <i>Percent<br/>of Total</i> |
|---|----------------------------|-----------------------------|----------------------------|--------------|-----------------------------|
| Corporate Establishment                                 | 0                          | 0                           | 1                          | 1            | 0.6%                        |
| e-Type Families   | 0                          | 0                           | 2                          | 2            | 1.1%                        |
| Nouveau Money   | 0                          | 0                           | 2                          | 2            | 1.1%                        |
| Button-Down Families                                    | 0                          | 0                           | 2                          | 2            | 1.1%                        |
| Unibox Transferees                                      | 0                          | 0                           | 3                          | 3            | 1.7%                        |
| Fiber-Optic Families                                    | 0                          | 0                           | 1                          | 1            | 0.6%                        |
| Late-Nest Suburbanites                                  | 0                          | 0                           | 4                          | 4            | 2.3%                        |
| Multi-Ethnic Families                                   | 1                          | 1                           | 2                          | 4            | 2.3%                        |
| Uptown Families   | 1                          | 1                           | 3                          | 5            | 2.9%                        |
| Multi-Cultural Families                                 | 0                          | 0                           | 3                          | 3            | 1.7%                        |
| Inner-City Families                                     | 1                          | 1                           | 2                          | 4            | 2.3%                        |
| Single-Parent Families                                  | 0                          | 0                           | 2                          | 2            | 1.1%                        |
| In-Town Families  | 1                          | 1                           | 1                          | 3            | 1.7%                        |
| New American Strivers                                   | 1                          | 1                           | 2                          | 4            | 2.3%                        |
| Subtotal:   | 5                          | 5                           | 30                         | 40           | 23.0%                       |

† For fiscal year 2024, Macon-Bibb County, GA Metro Median Family Income for a family of four is \$70,700.

†† Predominantly three- to five-person households.

SOURCE: Claritas, Inc.;  
Zimmerman/Volk Associates, Inc.

**Target Groups For New Single-Family Attached For-Sale**  
***The Downtown Macon Study Area***  
*Macon-Bibb County, Georgia*

. . . . . Number of Households . . . . .

| <b>Younger<br/>Singles &amp; Couples**</b> | <i>60% to<br/>80% AMI†</i> | <i>80% to<br/>100% AMI†</i> | <i>Above<br/>100% AMI†</i> | <i>Total</i>  | <i>Percent<br/>of Total</i> |
|--|----------------------------|-----------------------------|----------------------------|---------------|-----------------------------|
| New Power Couples                          | 0                          | 0                           | 2                          | 2             | 1.1%                        |
| New Bohemians                              | 0                          | 0                           | 4                          | 4             | 2.3%                        |
| Cosmopolitan Elite                         | 0                          | 0                           | 2                          | 2             | 1.1%                        |
| The VIPs                                   | 1                          | 1                           | 9                          | 11            | 6.3%                        |
| Fast-Track Professionals                   | 0                          | 0                           | 3                          | 3             | 1.7%                        |
| Suburban Achievers                         | 0                          | 0                           | 3                          | 3             | 1.7%                        |
| Small-City Singles                         | 2                          | 2                           | 2                          | 6             | 3.4%                        |
| Suburban Strivers                          | 1                          | 1                           | 3                          | 5             | 2.9%                        |
| Downtown Couples                           | 1                          | 1                           | 6                          | 8             | 4.6%                        |
| Twentysomethings                           | 1                          | 1                           | 2                          | 4             | 2.3%                        |
| Second-City Strivers                       | 1                          | 1                           | 1                          | 3             | 1.7%                        |
| Downtown Proud                             | 0                          | 0                           | 2                          | 2             | 1.1%                        |
| Multi-Ethnic Singles                       | 5                          | 3                           | 5                          | 13            | 7.5%                        |
| Subtotal:                                  | 12                         | 10                          | 44                         | 66            | 37.9%                       |
| <b>Total Households:</b>                   | <b>23</b>                  | <b>20</b>                   | <b>131</b>                 | <b>174</b>    | <b>100.0%</b>               |
| <b>Percent of Total:</b>                   | <b>13.2%</b>               | <b>11.5%</b>                | <b>75.3%</b>               | <b>100.0%</b> |                             |

† For fiscal year 2024, Macon-Bibb County, GA Metro Median Family Income for a family of four is \$70,700.

\*\* Predominantly one- and two-person households.

SOURCE: Claritas, Inc.;  
Zimmerman/Volk Associates, Inc.

**Target Groups For New Urban Single-Family Detached For-Sale**  
***The Downtown Macon Study Area***  
*Macon-Bibb County, Georgia*

. . . . . Number of Households . . . . .

| <b>Empty Nesters<br/>&amp; Retirees**</b> | <i>60% to<br/>80% AMI†</i> | <i>80% to<br/>100% AMI†</i> | <i>Above<br/>100% AMI†</i> | <i>Total</i> | <i>Percent<br/>of Total</i> |
|---|----------------------------|-----------------------------|----------------------------|--------------|-----------------------------|
| Affluent Empty Nesters                    | 0                          | 0                           | 8                          | 8            | 2.0%                        |
| The One Percenters                        | 0                          | 0                           | 8                          | 8            | 2.0%                        |
| Old Money                                 | 0                          | 0                           | 6                          | 6            | 1.5%                        |
| The Social Register                       | 0                          | 0                           | 6                          | 6            | 1.5%                        |
| Small-Town Patriarchs                     | 2                          | 2                           | 26                         | 30           | 7.5%                        |
| New Empty Nesters                         | 1                          | 1                           | 15                         | 17           | 4.3%                        |
| Urban Establishment                       | 0                          | 0                           | 1                          | 1            | 0.3%                        |
| Pillars of the Community                  | 2                          | 2                           | 26                         | 30           | 7.5%                        |
| Second City Establishment                 | 1                          | 1                           | 10                         | 12           | 3.0%                        |
| Mainstream Empty Nesters                  | 2                          | 2                           | 17                         | 21           | 5.3%                        |
| Multi-Ethnic Empty Nesters                | 0                          | 0                           | 5                          | 5            | 1.3%                        |
| Middle-American Retirees                  | 4                          | 4                           | 33                         | 41           | 10.3%                       |
| Blue-Collar Retirees                      | 5                          | 4                           | 20                         | 29           | 7.3%                        |
| Middle-Class Move-Downs                   | 1                          | 1                           | 3                          | 5            | 1.3%                        |
| Hometown Seniors                          | 3                          | 2                           | 4                          | 9            | 2.3%                        |
| Second City Seniors                       | 2                          | 1                           | 4                          | 7            | 1.8%                        |
| Subtotal:                                 | 23                         | 20                          | 192                        | 235          | 59.0%                       |

† For fiscal year 2024, Macon-Bibb County, GA Metro Median Family Income for a family of four is \$70,700.

\*\* Predominantly one- and two-person households.

SOURCE: Claritas, Inc.;  
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**Target Groups For New Urban Single-Family Detached For-Sale**  
***The Downtown Macon Study Area***  
*Macon-Bibb County, Georgia*

. . . . . Number of Households . . . . .

| <b>Traditional &amp;<br/>Non-Traditional Families††</b> | <i>60% to<br/>80% AMI†</i> | <i>80% to<br/>100% AMI†</i> | <i>Above<br/>100% AMI†</i> | <i>Total</i> | <i>Percent<br/>of Total</i> |
|---|----------------------------|-----------------------------|----------------------------|--------------|-----------------------------|
| Corporate Establishment                                 | 0                          | 0                           | 7                          | 7            | 1.8%                        |
| e-Type Families   | 0                          | 0                           | 4                          | 4            | 1.0%                        |
| Nouveau Money   | 0                          | 0                           | 5                          | 5            | 1.3%                        |
| Button-Down Families                                    | 1                          | 1                           | 10                         | 12           | 3.0%                        |
| Unibox Transferees                                      | 1                          | 1                           | 6                          | 8            | 2.0%                        |
| Fiber-Optic Families                                    | 1                          | 1                           | 5                          | 7            | 1.8%                        |
| Late-Nest Suburbanites                                  | 1                          | 1                           | 3                          | 5            | 1.3%                        |
| Multi-Ethnic Families                                   | 2                          | 2                           | 8                          | 12           | 3.0%                        |
| Uptown Families   | 2                          | 2                           | 9                          | 13           | 3.3%                        |
| Multi-Cultural Families                                 | 1                          | 1                           | 3                          | 5            | 1.3%                        |
| Inner-City Families                                     | 1                          | 1                           | 1                          | 3            | 0.8%                        |
| Single-Parent Families                                  | 0                          | 0                           | 3                          | 3            | 0.8%                        |
| In-Town Families  | 4                          | 3                           | 4                          | 11           | 2.8%                        |
| New American Strivers                                   | 1                          | 1                           | 0                          | 2            | 0.5%                        |
| Subtotal:   | 15                         | 14                          | 68                         | 97           | 24.4%                       |

† For fiscal year 2024, Macon-Bibb County, GA Metro Median Family Income for a family of four is \$70,700.

†† Predominantly three- to five-person households.

SOURCE: Claritas, Inc.;  
Zimmerman/Volk Associates, Inc.

**Target Groups For New Urban Single-Family Detached For-Sale**  
***The Downtown Macon Study Area***  
*Macon-Bibb County, Georgia*

. . . . . Number of Households . . . . .

| <b>Younger<br/>Singles &amp; Couples**</b> | <i>60% to<br/>80% AMI†</i> | <i>80% to<br/>100% AMI†</i> | <i>Above<br/>100% AMI†</i> | <i>Total</i>  | <i>Percent<br/>of Total</i> |
|--|----------------------------|-----------------------------|----------------------------|---------------|-----------------------------|
| New Power Couples                          | 0                          | 0                           | 3                          | 3             | 0.8%                        |
| New Bohemians                              | 0                          | 0                           | 1                          | 1             | 0.3%                        |
| Cosmopolitan Elite                         | 0                          | 0                           | 2                          | 2             | 0.5%                        |
| The VIPs                                   | 0                          | 0                           | 5                          | 5             | 1.3%                        |
| Suburban Achievers                         | 1                          | 1                           | 5                          | 7             | 1.8%                        |
| Small-City Singles                         | 6                          | 5                           | 9                          | 20            | 5.0%                        |
| Suburban Strivers                          | 2                          | 1                           | 3                          | 6             | 1.5%                        |
| Downtown Couples                           | 1                          | 1                           | 7                          | 9             | 2.3%                        |
| Twentysomethings                           | 0                          | 0                           | 1                          | 1             | 0.3%                        |
| Second-City Strivers                       | 0                          | 0                           | 1                          | 1             | 0.3%                        |
| Downtown Proud                             | 0                          | 0                           | 1                          | 1             | 0.3%                        |
| Multi-Ethnic Singles                       | 3                          | 2                           | 5                          | 10            | 2.5%                        |
| Subtotal:                                  | 13                         | 10                          | 43                         | 66            | 16.6%                       |
| <b>Total Households:</b>                   | <b>51</b>                  | <b>44</b>                   | <b>303</b>                 | <b>398</b>    | <b>100.0%</b>               |
| <b>Percent of Total:</b>                   | <b>12.8%</b>               | <b>11.1%</b>                | <b>76.1%</b>               | <b>100.0%</b> |                             |

† For fiscal year 2024, Macon-Bibb County, GA Metro Median Family Income for a family of four is \$70,700.

\*\* Predominantly one- and two-person households.

SOURCE: Claritas, Inc.;  
 Zimmerman/Volk Associates, Inc.

**Optimum Market Position—Affordable and Market-Rate Dwelling Units  
Mixed-Income Development  
The Downtown Macon Study Area**  
*Macon-Bibb County, Georgia*  
**February, 2025**

| <u>Percent of<br/>Households<br/>Number</u> | <u>Housing<br/>Type</u>   | <u>Unit<br/>Configuration</u> | <u>Unit<br/>Mix</u> | <u>Base<br/>Rent/Price</u> | <u>Unit<br/>Size</u> | <u>Rent/Price<br/>Per Sq. Ft.</u> | <u>Annual Units<br/>Absorbed</u> |
|---|---|-------------------------------|---------------------|----------------------------|----------------------|-----------------------------------|----------------------------------|
| <b>58.5%</b>                                | <b>Multi-Family For-Rent: Courtyard, Liner, and Mansion Buildings</b> |                               |                     |                            |                      |                                   | <b>149 to 179</b>                |
| 202   | Microlofts; Lofts<br>{Affordable}                                     | Microloft/1ba                 | 40%                 | \$600                      | 400                  | \$1.50                            | 30 to 36                         |
|   |   | 1br/1ba                       | 45%                 | \$825                      | 550                  | \$1.50                            |                                  |
|   |   | 2br/1ba                       | 15%                 | \$1,150                    | 800                  | \$1.44                            |                                  |
|   |   | Weighted Average:             |                     |                            | \$784                | 528                               |                                  |
| 141   | Apartments<br>{Affordable}  | 1br/1ba                       | 60%                 | \$850                      | 550                  | \$1.55                            | 21 to 25                         |
|   |   | 2br/1ba                       | 20%                 | \$1,200                    | 800                  | \$1.50                            |                                  |
|   |   | 2br/2ba                       | 20%                 | \$1,300                    | 900                  | \$1.44                            |                                  |
|   |   | Weighted Average:             |                     |                            | \$1,010              | 670                               |                                  |
| 295   | Microlofts; Lofts<br>{Market-Rate}                                    | Microloft/1ba                 | 25%                 | \$900                      | 400                  | \$2.25                            | 44 to 53                         |
|   |   | Studio/1ba                    | 35%                 | \$1,100                    | 500                  | \$2.20                            |                                  |
|   |   | 1br/1ba                       | 30%                 | \$1,350                    | 700                  | \$1.93                            |                                  |
|   |   | 2br/2ba                       | 10%                 | \$1,650                    | 950                  | \$1.74                            |                                  |
|   |   | Weighted Average:             |                     |                            | \$1,180              | 580                               |                                  |
| 362   | Apartments<br>{Market-Rate}   | Studio/1ba                    | 45%                 | \$1,500                    | 600                  | \$2.50                            | 54 to 65                         |
|   |   | 1br/1ba                       | 25%                 | \$1,650                    | 750                  | \$2.20                            |                                  |
|   |   | 2br/2ba                       | 15%                 | \$2,300                    | 1,200                | \$1.92                            |                                  |
|   |   | 3br/2.5ba                     | 15%                 | \$2,700                    | 1,450                | \$1.86                            |                                  |
|   |   | Weighted Average:             |                     |                            | \$1,838              | 855                               |                                  |
| 1,000                                       | Combined Weighted Averages:   |                               |                     | \$1,314                    | 682                  | \$1.93                            |                                  |

NOTE: Base rents and prices are in year 2025 dollars, do not include floor or view premiums, options or upgrades.

SOURCE: Zimmerman/Volk Associates, Inc.

**Optimum Market Position–Affordable and Market-Rate Dwelling Units  
Mixed-Income Development  
The Downtown Macon Study Area  
Macon-Bibb County, Georgia  
February, 2025**

| <u>Percent of<br/>Households<br/>Number</u> | <u>Housing<br/>Type</u>   | <u>Unit<br/>Configuration</u> | <u>Unit<br/>Mix</u> | <u>Base<br/>Rent/Price</u> | <u>Unit<br/>Size</u> | <u>Rent/Price<br/>Per Sq. Ft.</u> | <u>Annual Units<br/>Absorbed</u> |
|---|---|-------------------------------|---------------------|----------------------------|----------------------|-----------------------------------|----------------------------------|
| <b>8.0%</b>                                 | <b>Multi-Family For-Sale: Mansion Buildings</b>                         |                               |                     |                            |                      |                                   | <b>14 to 17</b>                  |
| 38  | Condominiums<br>{Affordable}  | 1br/1ba                       | 55%                 | \$125,000                  | 600                  | \$208                             | 4 to 5                           |
|   |   | 2br/1ba                       | 35%                 | \$185,000                  | 900                  | \$206                             |                                  |
|   |   | 2br/2ba                       | 10%                 | \$205,000                  | 1,000                | \$205                             |                                  |
|   | Weighted Average:   |                               |                     | \$154,000                  | 745                  | \$207                             |                                  |
| 99  | Condominiums<br>{Market-Rate}   | 1br/1.5ba                     | 45%                 | \$265,000                  | 900                  | \$294                             | 10 to 12                         |
|   |   | 2br/2ba                       | 35%                 | \$335,000                  | 1,250                | \$268                             |                                  |
|   |   | 2br/2.5ba                     | 20%                 | \$375,000                  | 1,450                | \$259                             |                                  |
|   | Weighted Average:   |                               |                     | \$311,500                  | 1,133                | \$275                             |                                  |
| 137   | Combined Weighted Averages:   |                               |                     | \$267,814                  | 1,025                | \$261                             |                                  |
| <b>10.2%</b>                                | <b>Single-Family Attached For-Sale: Rowhouses; Townhouses; Duplexes</b> |                               |                     |                            |                      |                                   | <b>17 to 21</b>                  |
| 43  | Rowhouses/<br>Townhouses<br>{Affordable}                                | 2br/1ba                       | 50%                 | \$195,000                  | 925                  | \$211                             | 4 to 5                           |
|   |   | 2br/1.5ba                     | 25%                 | \$210,000                  | 1,050                | \$200                             |                                  |
|   |   | 3br/1.5ba                     | 25%                 | \$235,000                  | 1,250                | \$188                             |                                  |
|   | Weighted Average:   |                               |                     | \$208,750                  | 1,038                | \$201                             |                                  |
| 131   | Townhouses/<br>Duplexes<br>{Market-Rate}                                | 2br/1.5ba                     | 35%                 | \$325,000                  | 1,200                | \$271                             | 13 to 16                         |
|   |   | 2br/2.5ba                     | 45%                 | \$365,000                  | 1,350                | \$270                             |                                  |
|   |   | 3br/2.5ba                     | 20%                 | \$415,000                  | 1,550                | \$268                             |                                  |
|   | Weighted Average:   |                               |                     | \$361,000                  | 1,338                | \$270                             |                                  |
| 174   | Combined Weighted Averages:   |                               |                     | \$323,375                  | 1,263                | \$256                             |                                  |

NOTE: Base rents and prices are in year 2025 dollars, do not include floor or view premiums, options or upgrades.

SOURCE: Zimmerman/Volk Associates, Inc.

**Optimum Market Position—Affordable and Market-Rate Dwelling Units  
Mixed-Income Development  
The Downtown Macon Study Area**  
*Macon-Bibb County, Georgia*  
**February, 2025**

| <u>Percent of<br/>Households<br/>Number</u> | <u>Housing<br/>Type</u>  | <u>Unit<br/>Configuration</u> | <u>Unit<br/>Mix</u> | <u>Base<br/>Rent/Price</u> | <u>Unit<br/>Size</u> | <u>Rent/Price<br/>Per Sq. Ft.</u> | <u>Annual Units<br/>Absorbed</u>                  |
|---|--|-------------------------------|---------------------|----------------------------|----------------------|-----------------------------------|---|
| <b>23.3%</b>                                | <b>Single-Family Detached For-Sale: Tiny Homes; Cottages; Urban Houses</b> |                               |                     |                            |                      |                                   | <b>40 to 47</b>                                   |
| 51  | Tiny Houses<br>{Affordable}  | 1br/1ba                       | 45%                 | \$85,000                   | 450                  | \$189                             | 5 to 6  |
|   |  | 1br/1ba                       | 25%                 | \$100,000                  | 550                  | \$182                             |   |
|   |  | 2br/1ba                       | 30%                 | \$135,000                  | 750                  | \$180                             |   |
|   |  | Weighted Average:             |                     |                            | \$103,750            | 565                               |   |
| 110   | Cottages<br>{Affordable}   | 2br/1ba                       | 35%                 | \$165,000                  | 950                  | \$174                             | 11 to 13  |
|   |  | 2br/2ba                       | 45%                 | \$190,000                  | 1,150                | \$165                             |   |
|   |  | 3br/2ba                       | 20%                 | \$215,000                  | 1,350                | \$159                             |   |
|   |  | Weighted Average:             |                     |                            | \$186,250            | 1,120                             |   |
| 237   | Urban Houses<br>{Market-Rate}  | 2br/2.5ba                     | 30%                 | \$350,000                  | 1,300                | \$269                             | 24 to 28  |
|   |  | 3br/2ba                       | 30%                 | \$395,000                  | 1,500                | \$263                             |   |
|   |  | 3br/2.5ba                     | 25%                 | \$425,000                  | 1,650                | \$258                             |   |
|   |  | 4br/2.5ba                     | 15%                 | \$465,000                  | 1,850                | \$251                             |   |
|   |  | Weighted Average:             |                     |                            | \$399,500            | 1,530                             |   |
| 398   | Combined Weighted Averages:  |                               |                     | \$302,664                  | 1,293                | \$234                             |   |
| <hr/> <hr/>                                 |  |                               |                     |                            |                      |                                   | <hr/> <hr/>                                       |
| <b>100.0%</b>                               |  |                               |                     |                            |                      |                                   | <b>220 to 264</b>                                 |
| 1,709                                       | Target Households  |                               |                     |                            |                      |                                   | units<br>per year                                 |
|   |  |                               |                     |                            |                      |                                   | <b>1,100 to 1,320</b><br>units<br>over five years |

NOTE: Base rents and prices are in year 2025 dollars, do not include floor or view premiums, options or upgrades.

SOURCE: Zimmerman/Volk Associates, Inc.



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Residential Market Analysis Across the Urban-to-Rural Transect

### 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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Residential Market Analysis Across the Urban-to-Rural Transect

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Zimmerman/Volk Associates, Inc. retains all rights, title, and interest in the ZVA Residential Target Market Methodology™ and the individual target market descriptions contained within this study. The specific findings of the analysis are the property of the client and can be distributed at the client's discretion.

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