

7 Findings & Analysis

Introduction

This section is the analysis of the existing conditions of Downtown Glen Ellyn. Topics include a summary of the market analysis performed specifically for the *Downtown Strategic Plan*, opportunity sites, and multi-modal transportation, parking, and historic preservation analyses. Recommendations to address the findings of the existing conditions of – and to create a future vision and strategy for – the Downtown are outlined in the chapters that follow.

Market Analysis

Most customers of Downtown retailers and restaurants originate from within Glen Ellyn, Wheaton, and other nearby communities. More than 80% of those responding to a merchant survey conducted specifically for the *Downtown Strategic Plan* indicated that they traveled fewer than ten minutes to reach their destinations in the Downtown. More than 70% of respondents reside within the Glen Ellyn zip code (60137).

Primary Market Area

A primary market area is the geographic area from which most (i.e. 70% or more) customers of a shopping center or shopping area are drawn. The market area for any specific cluster or set of stores is a function of the size and tenant make-up, the accessibility, and the scale and tenancies of competing store clusters. Therefore, market areas are dynamic and tend to change as a function of the type and supply of competing shopping locations. The travel time people are willing to expend in order to visit a shopping or business location varies as a function of both the size of the shopping areas and the relative uniqueness of the tenancies and environments available at alternative destinations. The relative accessibility to the shopping area and ease of getting in, about, and out of the shopping area also influence the trade area. Uniqueness, attraction, and accessibility are not measured in the abstract, but are always relative to the specific competition in the market area.

Not all internally generated demand is satisfied in a primary market area. Some of the potential demand within the market area is lost to retailers outside the market area. Conversely, retail sales in a market area will be made to visitors who live outside the market area.

The interviews, review of supply, and results of the merchant customer survey suggest the primary source of demand for retail space in the Downtown currently originates from Glen Ellyn households and households located on the east

* *Information contained within this chapter is a general overview of what is contained in Appendix C: Data Collection and Analysis Report. Please reference the appendix for additional information.*

side of Wheaton. Some existing restaurateurs and specialty merchants attract customers beyond Glen Ellyn including Wheaton, Lombard, Oak Brook, and Downtown Chicago.

The primary market area for Downtown retail uses is estimated to extend two to three miles from the Downtown, generally bound by North Avenue to the north, Butterfield Road to the south, Naperville Road/Main Street – Wheaton to the west, and I-355 to the east.

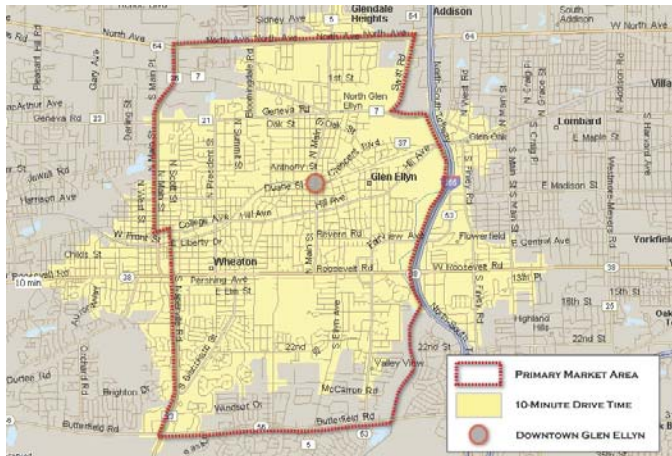


Figure 21: Primary Market Area
Source: Gruen Gruen + Associates

Youths, seniors, and stay-at-home-moms are primary consumers in the Downtown. Requests made for goods and services during the planning process included shops with basic necessities at affordable prices (including children's clothing), men's stores, and after school activities and events for children (especially when they have half-days off).

Trends and Issues

In 2008, the largest global, national, and local economic downturn occurred since the Great Depression (which commenced in 1929). Although one could argue that the decline of Downtown Glen Ellyn began back in the mid-1960s, a noticeable change began in 2005. The Downtown retail vacancy rate increased from 2-3% in 2002-05 to 15% by the end of 2008, and the Downtown's share of Village-wide sales dropped from 21% in 2004 to 19% in 2005.

Downtown Glen Ellyn's successes and struggles are consistent with the current national trends:

- Downtown establishments are becoming more service-oriented.
- Transit ridership is on the rise.¹ Metra ridership increased five percent (5%) in the first half of 2008, compared with the same period in 2007. Eight of Metra's "Top 10" ridership months have occurred since July 2007. Metra's weekend ticket sales were up 20% in the first half of 2008.

In addition to reflecting on national trends, there are some notable characteristics for the primary market area of Downtown Glen Ellyn:

- The estimated retail supply in the Downtown's primary market area is double the estimated retail demand.
- The Downtown does not provide significant advantages for major office space users.
- There are not enough potential consumers living in the Downtown.

¹ "Record ridership strains CTA, Metra, Pace – and it's likely to get worse. Lack of capital improvement catches up to transit agencies." Chicago Tribune, September 2, 2008.

Market Niche for Downtown Glen Ellyn

Increasing the stock of Downtown housing, and encouraging the retention and expansion of existing retail and office businesses, to create a sustainable Downtown, requires a concentration and linkage of uses and improvements to the public realm that mutually reinforce development, redevelopment, and property enhancements. Unlike the traditional sequence of development, recommended actions will begin with a program to create an increasingly magnetic mixed-use agglomeration focused on residential, eating and drinking places, entertainment, and recreational and cultural activities.

Primary Challenge: Creating a Critical Mass of Compatible Uses

Retaining and attracting unique eating and drinking, and cultural and recreational uses, in a mixed-use environment represents the primary potential market challenge for Downtown Glen Ellyn. From a consumer's perspective, a successful Downtown serves as an anti-mall agglomeration. Eating and drinking places represent a relative strength that differentiates the Downtown from standard retail formats found outside of the Downtown. Encourage additional restaurants and cafes offering opportunities for outdoor eating and drinking.

The basic building block of eating and drinking places should be augmented with the retention and enhancement of existing entertainment and recreational-oriented uses such as the Glen Art Theatre and the attraction of additional entertainment and recreational uses. The Illinois Prairie Path and nearby Lake Ellyn also serve as recreational-oriented uses.

The mixed-use aspect, including housing, (the occupants of which reinforce demand for retail and eating and drinking and entertainment establishments, and include decision-makers for professional office space demand and sources of labor), create a dynamic environment and multi-purpose visits. Adding housing Downtown is especially important given the surrounding area is substantially built-out and population growth is likely to be limited. The creation of multi-family housing will serve the needs of empty nesters and younger-aged, smaller-sized households.

Recommended Priority Strategies and Actions

Several kinds of actions will encourage the evolution of Downtown from its historic functions to the newer role that the Downtown can serve to the benefit of its residents and local economy.

Increase the Number of Downtown Residential Living Opportunities

The size or scale of the potential demand sources suggest that once confidence increases, the credit market seizure ends, and the national housing market recovers, even a relatively small capture rate within the primary market area of Glen Ellyn and Wheaton would support the development of more new housing than has been than has been created or built in Downtown Glen Ellyn in recent decades. If, for example, housing built Downtown captures 20 percent of the potential demand of the 2,300 empty-nester, younger age², and single/divorced professional households with the potential to move in the next five years, this would equate to on average approximately 91 housing units per year or a total of 456 additional units over five years.³

Encourage a Critical Mass of Restaurant, Entertainment, and Retail Uses and Events

The challenge will be to attract a critical mass of eating and drinking-related establishments, stores, and services that have unique attractions or drawing power and are not readily duplicated in competing locations. New commercial space in the Downtown will need to capture demand now being realized by existing shopping agglomerations, and should be constructed to meet the needs of modern retailers. National retailers prefer locations on Roosevelt and Butterfield Roads, and in or adjoining nearby regional malls such as Oak Brook Mall, Yorktown Center in Lombard, and specialty centers such as Wheaton Town Square which offer greater accessibility, visibility and agglomeration advantages than does Downtown Glen Ellyn. Locations in or near the regional-serving centers serve to generate spill-over benefits for retailers part of the agglomerations or cluster of retail uses.

² First-time home buyers, and 20- and 30-something young professionals.

³ See *Appendix B: Market Analysis and Strategic Action Plan for Downtown Glen Ellyn*, Page 53.

Restaurants and other eating and drinking places in Downtown Glen Ellyn will help provide customer traffic to support retail tenants and appeal to residents and office-space using businesses. In addition, additional restaurants and entertainment opportunities, particularly those that occur in the nighttime, will enrich the image of the Downtown as more than just a place to shop and are likely to be able to share parking with complementary daytime uses.

Enhance the connections with other governmental and service organizations such as the College of DuPage and Morton Arboretum, and consider the following:

- Relocate the Global Art Film Festival to the Glen Art Theatre in the Downtown.
- Create a band shell in the Downtown for concerts.
- Encourage the establishment of venues for music, theatre and other performances by student groups associated with the College of DuPage, as well as touring groups arranged by McAninch Arts Center (MAC) of the College of DuPage.
- Offer facilities and/or sites in the Downtown for speaking events, performances, film screenings, and rotating art exhibits.
- Consider partnering with the Chicago Council of Global Affairs to coordinate speaking engagements, in addition to the College of DuPage and the MAC for performances and exhibits.
- Coordinate internship, co-op, and other culinary and hospitality opportunities between the College of DuPage and Downtown restaurants.

Retail stores, particularly specialty stores, depend upon foot traffic and visibility as a primary advantage in attracting customers. It is important for retailers to be near other stores, to be visible, and to offer an inviting street presence. Smaller, but specialized apparel, and accessory tenancies are examples of the kinds of tenancies, if grouped together, are more likely to succeed than general merchandise stores. If the Downtown is able to create a more significant agglomeration of such specialty tenancies it will need to attract a greater number of customers from beyond Glen Ellyn because of the availability of uniquely responsive merchandise and customer-oriented service in a fun, pedestrian-oriented, and pleasant environment. This will necessarily include the creation of more “internal” competition in the Downtown, but this internal competition will be more than offset by improving the Downtown’s position in the wider market place.

- Enhance Event Programming
- Augment Parking
- Create Iconic Gathering Space and Greenway
- Integrate Additional Housing
- Enhance Way-finding and Signage
- Monitor Progress

Improve Organizational Clarity and Capacity, and Conditions for Success

Clarify roles, responsibilities, and relationships for the various community organizations; establish an independent Downtown committee; nurture existing and incubate new retail and office businesses; continue to improve the development review process; and appoint an ombudsman.

Long-Term Strategy

The *Downtown Strategic Plan* is a 20-year strategy to create an economically-viable Downtown. Implementation will occur over time, with only a few simple and low-cost initiatives recommended to commence in the months that immediately follow the adoption of the plan.

Historic Preservation Analysis

Downtown Glen Ellyn has a rich collection of historically- and culturally-significant buildings. A majority of the building exteriors are well-preserved and in good condition. In addition, a majority of the buildings are occupied. These historic buildings are a very positive contributing feature towards the Village of Glen Ellyn's overall character. There is a concentration of such buildings along Main Street (between Pennsylvania Avenue to the north and Hillside Avenue to the south) and Crescent Boulevard.



Figure 22: Historic Structure Inventory and Proposed Historic District Boundary
Source: BauerLatoza Studio

Properties at 488-490 Main Street, 536 Crescent Boulevard, Hillside Apartments on Hillside Avenue, and 487 Duane Street, (illustrated below), represent a small sample of the historical ambiance in Downtown Glen Ellyn.



Source: Town Builder Studios and BauerLatoza Studio

Opportunity Sites

Communities will always change and evolve, and Glen Ellyn is no exception. The properties illustrated and listed below are identified for their potential to be redeveloped, repurposed, and/or reinvigorated.



Figure 23: Properties Susceptible to Change

Source: Town Builder Studios

North side of Pennsylvania, left to right:

- A. Redevelop or retrofit vacant small office building.
- B. Redevelop or repurpose buildings and utilize back yards of adjacent residential properties.
- C. Redevelop Fire Station property – with or without relocation of Fire Station.
- D. Redevelop or repurpose buildings, and retain historic features.
- E. Redevelop or retrofit auto service property.

South side of Pennsylvania, left to right:

- F. Potential residential redevelopment with structured parking.
- G. Potential residential redevelopment with structured parking.
- H. Convert properties to a mixed-use parking structure with a pedestrian-friendly and historically-sensitive development pattern.

North side of Duane, left to right:

- I. Preliminary Planned Unite Development (PUD) approved for 20 townhomes on the three westernmost properties. (The developer will not be moving forward with this project.)
- J. House and Duane/Lorraine lot could be converted to other uses yet retain parking.
- K. PUD approved for a row house development between Prospect and Glenwood.
- L. Retrofit properties to historically-sensitive, mixed-use building designs, and include some greenspace.
- M. Retrofit bank property into a mixed-use parking structure with a pedestrian-friendly and historically-sensitive development pattern.
- N. Convert low-activity corner to new uses that cater to Illinois Prairie Path users.

South side of Duane, left to right:

- O. Redevelop existing multiple-family to new multiple-family with a historically-sensitive development pattern.
- P. Redevelop parking lot with a new multiple-family use.
- Q. Convert office building and parking lot into a more context-sensitive, office or mixed-use development.
- R. Redevelop funeral home (optional) and multiple family buildings into a new multiple-family redevelopment.

West side of Main Street:

- S. Redevelop parking lots to new uses such as a mixed-use building along Main Street and multiple family residential buildings along Glenwood Road, yet retain the parking supply. The building should have the same setback as the neighboring buildings.

Multi-Modal Transportation Analysis

Access to and within the Downtown is critical to its success. Streets, sidewalks, pathways and the railroad are the paths of access to the Downtown. Many residents who live near the Downtown choose to walk due to the short distance, for the exercise, and to avoid driving around Downtown looking for a parking space.

Pedestrians

Many participants in the planning process mentioned that one of the positive attributes of the Downtown is its pedestrian-friendliness. Many of these same people also mentioned that parking is not convenient, while others said that if someone is willing to walk just a block or two there is ample parking. Pedestrian-friendliness is more than just walking a block or two – the walk also needs to be enjoyable enough that a one- or two-block walk doesn't seem like a long distance.

Sidewalks and crosswalks are key components of pedestrian-friendliness – too narrow and people bump into each other as they pass by; too wide/empty and the ambiance can feel cold and uninviting; too poorly maintained and they become a safety hazard; and too much snow and ice and people might go home or shop in an enclosed mall. Not every driver yields to pedestrians in crosswalks, so crossing streets can sometimes result in an unpleasant experience.

Multiple participants mentioned issues regarding the maintenance of the sidewalks – either sections of concrete that are in need of repair/replacement or that sidewalks are not completely cleared of snow/ice. Piles of snow along the curb line also make it difficult for people to get in and out of their cars when they utilize on-street parking.

Bicycles

Finding safe routes of travel to and from the Downtown – for recreation or for transportation purposes – must be a high priority.

The DuPage County Bikeways and Trails Map, indicates a “Proposed Local Bikeway” along Lorraine Road from Duane Street, south to Roosevelt Road (via Greenfield Avenue and Lambert Avenue), past the Glen Ellyn Village Links, east on Fawell Boulevard, to points east of I-355.

Observations indicate that many more racks are needed in the Downtown due to high bicycle parking demand – especially on nice days (i.e. bikes are locked up to lamp posts, trees, and fences).

Prairie Path Park is listed as a point of interest along the Illinois Prairie Path, and a drinking fountain is the only amenity listed for Downtown Glen Ellyn in the DuPage County Trail Guide⁴. The Downtown has more than that to

⁴ <http://www.dupageco.org/bikeways/trailGuide.pdf>

offer now, and it will have more reasons to draw visitors as *the Downtown Strategic Plan* is implemented over the years.

Transit

Commuter rail and passenger bus services move large numbers of passengers with greater fuel-efficiency than a large number of personal automobiles moving the same individuals from their points of origin to their points of destination. Freight rail moves large quantities of goods and services for great distances with greater fuel-efficiency than a large number of trucks moving the same inventory from their points of origin to their points of destination.

Metra's draft *Environmental Assessment* for the Union Pacific – West line, identifies the Glen Ellyn Train Station as a successful commuter hub, and identifies the need for a minimum of 300-500 new commuter spaces by 2011. The only way the Downtown can accommodate this need is by building one or more parking structures. These parking structures would have an added benefit of allowing the unused spaces to be used by the general public after the morning rush hour, in the evenings, and on weekends.

The study area has three at-grade railroad crossings – one each at Prospect Avenue, Main Street, and Park Boulevard. The crossings at Main Street and Park Boulevard have decorative planters and benches so that pedestrians can take a seat and rest if the wait for passing trains is long.

The Union Pacific Railroad (UPRR) bisects the Downtown into north-south segments, and the rail corridor interrupts the flow of pedestrian, bicycle, and vehicular traffic each time a train passes through the Downtown.

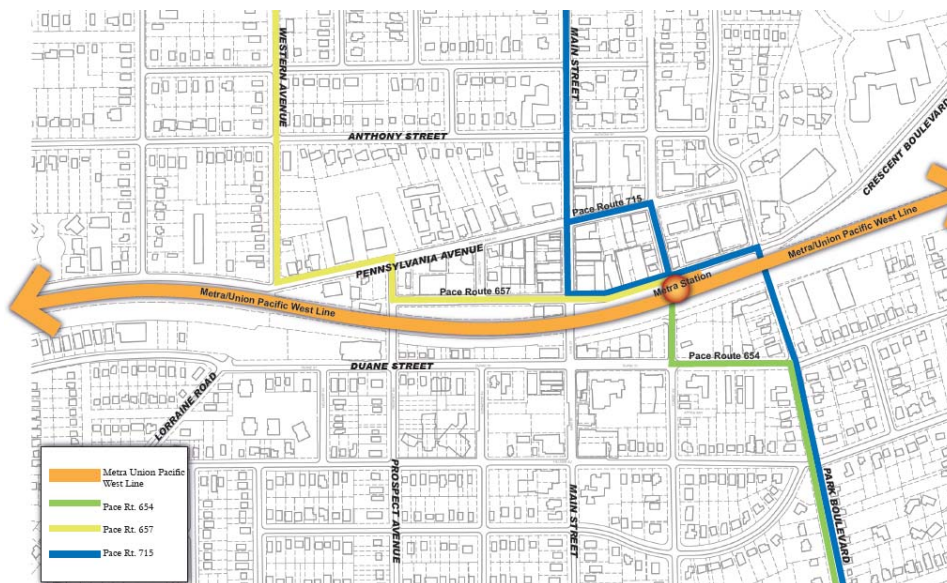


Figure 24: Transit Routes
Source: Town Builder Studios



Figure 25: Bicycle Routes and Cautions
Source: Town Builder Studios

Automobiles

Automobile access to the Downtown is evident through concerns expressed among many participants throughout the planning process – “not enough parking” and “get rid of the one-way streets” were comments frequently heard. Although there are some participants in the minority who indicated that they have no problem finding parking or prefer the existing one-way street system.

In order to accommodate the higher traffic levels that most national retailers look for, the existing Main Street right-of-way would need to be widened to accommodate four lanes of traffic, which would result in the loss of the Downtown atmosphere and bring greatly increased traffic volumes through the neighborhoods north and south of Downtown. Although widening the existing right-of-way is not feasible, conversion of one-way traffic patterns to two-way traffic patterns within the existing road right-of-way is feasible. A two-way traffic pattern would improve traffic flow and circulation in the Downtown; however, this would not provide for the traffic volumes necessary to attract a regional retailer.

The existing one-way loop from Crescent Boulevard, to Forest Avenue, to Pennsylvania Avenue, to Main Street, passes by very few public parking spaces, resulting in frustration to the traveling public. Several individuals participating in the planning process admitted to getting so frustrated after driving “the loop” several times, that they took their business elsewhere.



Figure 26: One-Way Streets
Source: Town Builder Studios

Parking Analysis

Transit-Oriented Developments (TODs) – of which Downtown Glen Ellyn is an example – are about people, not cars; therefore, people must be the top priority in any development design. However, in modern American society, the need for personal automobiles cannot be ignored, and must be accommodated.

Parking should be shared whenever and wherever possible. The most straightforward example of shared parking is utilizing daytime office parking for evening restaurant and entertainment parking. Rules of Thumb for parking in TODs include the following⁵:

- Retail: 0-3 spaces/1,000 SF
- Office: 1 space/1,000 SF
- Residential: 1 space/dwelling unit
- Mixed-Use Environment: 50% shared spaces (minimum)

Since Downtown Glen Ellyn was established before the invention of the automobile, most of the properties are small in size and shallow in depth, and the historic buildings on these properties cover most – if not all – of their respective parcels, leaving little or no opportunity for on-site parking.

Parking Access

Another issue to consider in evaluating the availability of parking in the Downtown area is how easy or difficult the various parking lots are for drivers to access. Since there are a lot of one-way streets in the Downtown area, a driver needs to become somewhat familiar with the traffic flow before he/she will know how to access each parking lot. The one-way loop along Crescent Boulevard, Forest Avenue, Pennsylvania Avenue, and Main Street leads drivers past more private parking spaces than public parking spaces.

Parking Supply

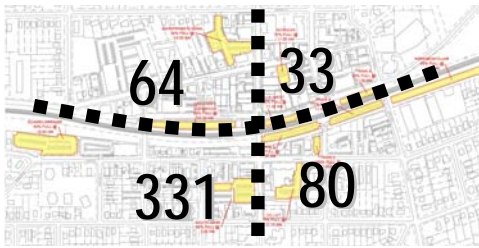
The “parking supply” is the number of parking spaces available for use within the Downtown. It is important to have a “cushion” of extra spaces in the supply to account for operating fluctuations, vehicle maneuvers, improperly parked vehicles, snow cover, and minor construction, etc. A parking system operates at optimum efficiency at somewhat less than its actual capacity. It is unrealistic to expect a driver to find the last available parking space in a system without significant frustration and the resulting perception and reality that parking is inadequate.

The overall study zone provides approximately 3,030 spaces for the Downtown area. Of these spaces, 1,151 are available in “public”, off-street parking lots that serve Metra commuters, customers of Downtown businesses and Downtown employees. Some of these lots require permits for parking or include meters for collecting revenue. Of the 1,151 off-street “public” spaces, 508 spaces are available all day to customers and the general public (metered, a daily fee, or free). Approximately half (247 of 508 spaces) of the all-day public parking spaces are located on the periphery of the Downtown in the Duane/Lorraine Lot, west of the Public Library, in a location that is not convenient to Downtown shopping. An added disincentive to park at the Duane/Lorraine Lot is a daily parking fee. Some free parking is available in more convenient locations within the core Downtown area.

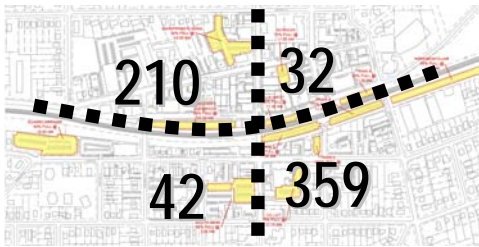
In addition, there are approximately 414 on-street public parking spaces in the study zone. These spaces are reserved for customer parking only, and most have a three-hour time limit.

There are approximately 1,465 spaces located in various “private” business parking lots that serve individual businesses. These lots do not require permits and do not charge fees, but they are intended to be reserved for customer and employee parking of the businesses that they serve.

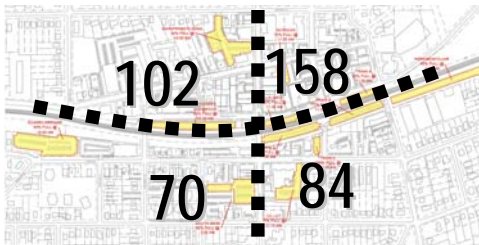
⁵ Source: *Transit-Oriented Development Design* Training Session. AICP Planners Training Service, Chicago, Illinois, June 6-7, 2008.



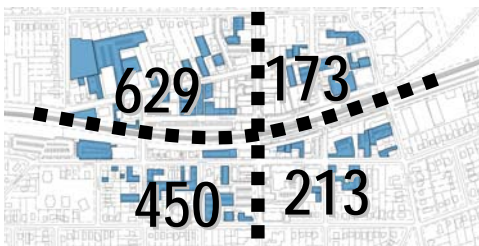
Public Shopper Parking 508 spaces



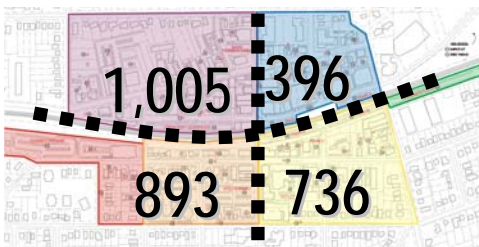
Public Permit Parking 643 spaces



Public On-Street Parking 414 spaces



Private Parking 1,465 spaces



Total Downtown Parking 3,030 spaces

Figure 27: Downtown Parking Supply⁶
 Source: Town Builder Studios and Walker Parking Consultants

⁶ "Public Shopper Parking" includes the parking supply available in the Duane/Lorraine Lot and the Civic Center Lot. "Public Permit Parking" includes commuter and leased spaces. Note: Vacant commuter parking spaces are available to the general public in the Train A, B, C, and D Lots after 11:00 a.m., and the Park/Montclair Lot after 2:00 p.m.

It appears that the overall parking supply in the Downtown area is unevenly distributed between the public and private parking supply, which contributes to the perceived shortage of parking in the area. In addition, two parking lots could impact the conclusions drawn from Figure 27:

- The Duane/Lorraine Lot in the Southwest Quadrant has 247 available parking spaces. Although this lot is available for public parking, many of the spaces are utilized by commuters. Assuming this lot is 80% full on a typical weekday, the number of available public shopper parking spaces is decreased by 198 spaces.
- The Civic Center Lot in the Southeast Quadrant has 80 available parking spaces. Although this lot is available for public parking, many of the spaces are utilized by Village staff beginning at 8:00 a.m. Assuming this lot is 75% full on a typical weekday, the number of available public shopper parking spaces is decreased by 60 spaces.

Glenbard West High School is just east of the Downtown outside the official *Downtown Strategic Plan* study area, yet it impacts parking at the east end of the Downtown. Parking is available for faculty and student use, which includes 166 off-street (on the west side of Ellyn Avenue) and 50 on-street parking spaces. In addition, some private property owners lease out Downtown parking spaces to high school students.

There is a long waiting list for merchant and commuter parking permits in the Downtown, with an average wait time of two years. The wait time tends to be a little shorter for merchant permits than for commuter permits. Of 896 total permit holders, 656 are commuters and 240 are merchants. Permits are renewed on either a quarterly or annual basis. It is very rare for permit holders to give up their permit once they have one; most people will keep their permits for as long as they live in Glen Ellyn. Permits are assigned to specific lots in the Downtown. Of the 644 total available spaces, a total of 896 permits have been sold; therefore, the lots are approximately 29% oversold.

Consumers want to park as close to their destination as possible. If a shopper needs to park around the corner from a desired destination in the Downtown, there is a perception that the parking is too far away, since the destination is not visible from where the car was parked. When a shopper parks at a mall, he/she may park at a greater distance from the desired location than the Downtown shopper, but there is a perception that the parking location is convenient since the desired destination is within view of where the car is parked.

There is a perception of a parking shortage – and the reality of a less-than-convenient public parking supply – that affects the Downtown. Consumers who want to shop or dine Downtown may choose to do so elsewhere if they cannot find a convenient parking space in the Downtown core or if they drive in circles in an effort to find a parking space. These same consumers may not know of all the possible parking locations available to them – including select commuter lots after 11:00 a.m.