



# THE VILLAGE OF BUFFALO GROVE LAKE COOK CORRIDOR MARKET STUDY AND PLAN

MARKET STUDY AND EXISTING CONDITION REPORT  
03/30/2017







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# INTRODUCTION

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# PROJECT OVERVIEW

## THE MARKET STUDY AND PLAN

The Village of Buffalo Grove, a premier suburban community of the Chicago Metropolitan Region, has commissioned this study to develop a vision plan for one of the Village’s key assets, the Lake Cook Corridor. The Corridor expands over 472 acres and represents a gateway into the Village of Buffalo Grove, as it connects the Village to local roads as well as to a larger regional network of expressways, highways, and roads. With more than 40,000 vehicles traveling on it per day, Lake Cook Road is one of the most utilized roads in the region.

The Lake Cook Corridor has over one million square feet of commercial space. The largest retail center, Town Center, anchors the east side of the corridor with more than 194,000 square feet of retail space. Its tenants include Bowlero, Buffalo Grove Theatre, and Giordano’s. Chase Plaza is located on the west side of the Corridor and offers over 93,000 square feet of retail space. This plaza was formerly anchored by Dominick’s grocery store, and is now largely vacant and suited for a strong anchor tenant or redevelopment. Complementing these two larger centers are smaller commercial centers and

businesses such as Four Points by Sheraton Hotel, Jewel Osco, Deerfield Bakery, Culver’s, Lou Malnati’s, as well as the new upscale restaurant, Countyline Tavern. The Corridor also has a base of healthcare users including Northshore Medical Group, Northwest Community Healthcare Immediate Care Center, as well as other medical specialist offices and rehabilitation care. Most of the healthcare users are located in the Corridor’s office developments. These developments offer over 570,000 square feet of office space in low to mid-rise facilities which were built in the late 1980s. All of the commercial developments (office and retail) in the Lake Cook Corridor represent an important source of revenue and vitality for the Village, however, they may not be conducive to current and future market demands as shown by high vacancy rates. Other properties in the corridor include St. Mary’s Church, school, and cemetery as well as several residential developments such as Manchester Greens, Lexington Glen, Woodstone, Turnberry, and Claremont (an assisted living facility).

A significant component of the Lake Cook Corridor is the 140 acres of land which is owned and operated by the Village of Buffalo Grove. This land consists of an 18-hole golf course and a municipal campus, along with large amounts of floodplain.

The Village has engaged this consultant team to help establish a long-term vision by way of the Lake Cook Corridor Market Study and Plan. This project will assist Buffalo Grove in taking advantage of the Corridor’s high visibility, mix of land uses, strong trade area demographics, and opportunities for redevelopment/development.

## GOALS AND OBJECTIVES

**“How can the Village best reposition the Lake-Cook Corridor so that it can optimize its growth potential?”**

The study’s underlying goal is to examine how the Village can best reposition the Lake Cook Corridor. The Lake Cook Corridor Market Study and Plan will explore this question by examining the Corridor’s land use and development options to improve the Village’s identity, vitality, and economic and fiscal sustainability.

The study’s goals and objectives aim to fulfill four key objectives.

### 1. Comprehensive Plans Grounded in Market Realities

A primary objective is ensuring that all visioning plans and ideas are comprehensive in scope and grounded in market realities. The project focuses on land use and development concepts but also includes other aspects necessary to repositioning the Corridor. These aspects include accessibility and connectivity, general design and place-making, economic development and market analysis, environmental/stormwater analysis, and wayfinding. All of these elements have been examined within the context of the surrounding properties.

Equally important, is that the project is grounded in market realities. The study draws upon market, traffic, economic, land use, stormwater, and real estate data to educate the Village on the highest and best use development and land use options.



## 2. Community Engagement and Public Communication

The study has been organized around innovative community engagement activities. These activities go beyond traditional public meetings to ensure a diverse array of residential, business, and other stakeholder voices are heard and incorporated. The activities include:

- The Creation of the Corridor Planning Group
- Key Stakeholder listening sessions
- Community Visioning Forums utilizing keypad polling and surveys
- Public Meetings
- Open Houses
- Dedicated Web-page/ Online forum

These efforts help increase clarity, confidence, and participation in the process by all members of the business and residential community who wish to be involved.

## 3. Incorporates High Quality Visuals

The study integrates high-quality visuals and other visioning exercises into the planning process. Three-dimensional imagery and various perspectives are necessary for all stakeholders to truly understand the look and feel of development and design ideas.

## THE VILLAGE OF BUFFALO GROVE

Located 35 miles northwest of Chicago, Illinois, the Village of Buffalo Grove is a bustling, home-rule municipality covering more than 9.25 square

miles in both Cook and Lake Counties. Through the Tri-State Tollway (I-294), Illinois 53-290 corridors, two Metra train stations, and other transportation networks, Buffalo Grove is well connected to other communities and regions across Illinois, and the country.

The Village currently has a population of 42,000 and almost half of all Buffalo Grove households earn more than \$100,000 per year. Village residents enjoy nationally-ranked public schools, expansive open spaces, access to employment centers, and other important amenities. Buffalo Grove's high quality of life influences the local residential real estate market. In 2015, Crain's Chicago Business Real Estate reported that homes in Buffalo Grove sold faster than any other community in the Chicago metropolitan area.

Building upon these assets is Buffalo Grove's strong financial status. The Village's high bond ratings along with minimal debt are a testament to the Village's strong fiscal management, excellent administration and capacity for future growth.

Buffalo Grove has a distinctive local economy with an employment base of 20,000 day workers and 10 million square feet of commercial and industrial space. The Village's advanced manufacturing centers, which include high-profile firms such as Siemens Industry Inc. and Flex are the community's economic engine.

Complementing these centers are commercial corridors scattered throughout Buffalo Grove. Some of the corridors have been recently developed while others are well-positioned for redevelopment.

## MARKET STUDY AND EXISTING CONDITIONS

The following document represents the efforts of the data gathering stage of the project. During this stage the project team studied the existing market conditions of the Village's primary land use categories focusing on Retail, Residential, Office, and Industrial sectors as well as specialty sectors specific to the study area context. The goal of this study is to document the current conditions and trends in the market, identify any needs within the study area, and to develop an educated recommendation of the potential future opportunities the Village could leverage in the development of the Corridor Plan.

In addition to the Market Study, the team performed an Existing Conditions Site Analysis to document the current land use, natural site characteristics, and transportation and traffic conditions within the study area. Based on this analysis a series of key findings have been compiled that preliminarily identify issues and opportunities that the study should address.

## PUBLIC OUTREACH

This section includes the process and feedbacks of the public engagement. During this stage, we work closely with stakeholders and community members to identify opportunities and issues, and communicate their vision and goals for the Corridor.

# 46th

**Best Place to Live in the US by Money Magazine. (The only Illinois community recognized in 2013)**

# 20th

**Safest community in the United States and 2nd safest in Illinois.**

# 7th

**Most family-friendly community in Illinois.**

# Best

**Chicago suburbs for young professionals.**







PART 1 | MARKET STUDY

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# DEMOGRAPHIC AND HOUSING ANALYSIS

## POPULATION AND HOUSEHOLDS

The Village has a population of approximately 42,000 people and an average household size of 2.53, which is slightly lower than that of Cook County and significantly smaller than that of Lake County, as shown in Table 2.0.

According to U.S. Census data, the Village has experienced a slight decrease in population of 3.7 percent between 2000 and 2016. The decrease contrasts with the slight population increase observed in Cook County of 2.0 percent and the significant population increase in Lake County of 10.2 percent (Table 2.1).

Buffalo Grove’s age profile indicates that the Village has generally an older demographic than the surrounding area. More specifically, the Village has a relatively low millennial (age 18-34) population and a higher baby-boomer (age 50-70) population (Table 2.2). Chart 2.0 reveals that the Village’s population has aged over time as the 2016 senior population (50+) represents approximately 33.3 percent, which is 16.4 percent higher than it was in 2000 when it represented 16.9 percent of the population. Interviews with community leaders and industry experts indicate that growing senior population is likely tethered to housing factors.

TABLE 2.0 ESTIMATED POPULATION, HOUSEHOLDS, AND HOUSEHOLD SIZE (2016)

	Buffalo Grove	Cook County	Lake County
POPULATION	41,616	5,298,497	710,368
HOUSEHOLDS	16,396	2,009,274	245,881
AVERAGE HOUSEHOLD SIZE	2.53	2.59	2.81

Source: U.S. Census Bureau, Census 2010 Summary File 1. ESRI forecasts for 2016 and 2021 and ESRI converted Census 2000 data into 2010 geography.

TABLE 2.1 ESTIMATED POPULATION AND CHANGE IN POPULATION (2016)

	Buffalo Grove	Cook County	Lake County
POPULATION, 2000	43,204	5,194,675	644,356
POPULATION, 2016	41,616	5,298,497	710,368
CHANGE, 2000-16	-1,588	103,822	66,012
CHANGE AS %, 2000-16	-3.7%	2.0%	10.2%

Source: U.S. Census Bureau, Census 2010 Summary File 1. ESRI forecasts for 2016 and 2021 and ESRI converted Census 2000 data into 2010 geography.

TABLE 2.2 ESTIMATED RESIDENT POPULATION BY AGE GROUP (% , 2016)

	Buffalo Grove	Cook County	Lake County
AGE 0-17	20.2%	22.6%	25.5%
AGE 18-34	17.7%	25.8%	21.6%
AGE 35-49	20.0%	19.5%	19.7%
AGE 50-69	30.8%	22.9%	25.2%
AGE 70+	11.2%	9.1%	8.0%

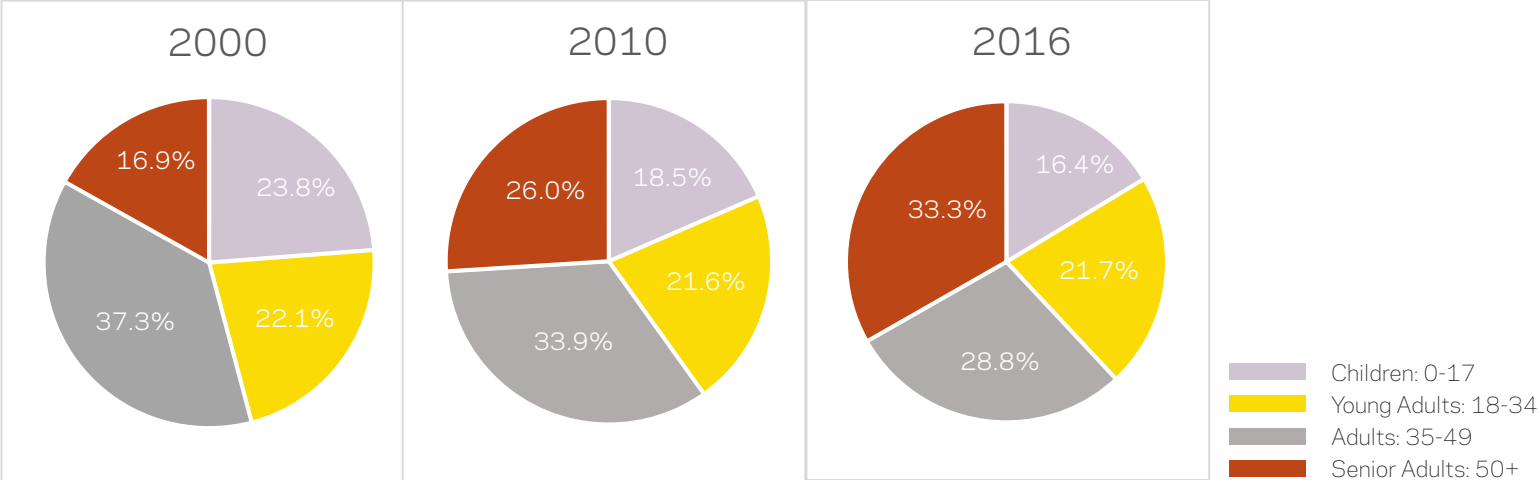
Source: U.S. Census Bureau, Summary File 1.



Many of today's residents have moved into the Village during their younger years to raise their family. Although their children have grown and moved out, they remain in their family home for a variety of reasons including their affinity for the Village, lack of housing choices and/or impacts from the housing downturn. The lack of housing turnover is one of the contributing factors to the aging population. However, this age profile can shift as the market continues to recover and new housing development projects come online.

Currently, the majority (72.2 percent) of Buffalo Grove residents are white. The next largest group is Asians, representing 17.2 percent of the population, which is a higher percentage than in Cook and Lake Counties (7.3 percent and 7.2 percent respectively). Overall, Buffalo Grove has become increasingly diverse in the past few decades (Chart 2.1). This is especially true of the Asian and Hispanics populations, which have grown by 8.8and2.5 percent since 2000 and now represent 17.2and 5.8 percent of the Village community, respectively.

CHART 2.0 ESTIMATED RESIDENT POPULATION BY AGE GROUP BY YEAR (% , 2000, 2010, 2016)



Source: U.S. Census Bureau. ESRI forecasts for 2016.

TABLE 2.3 ESTIMATED RACE AND ETHNICITY IN POPULATION (2016)

	Buffalo Grove		Cook County		Lake County	
	Count	Percent	Count	Percent	Count	Percent
WHITE	30,059	72.2%	2,021,423	38.2%	418,577	58.9%
HISPANIC OR LATINO*	2,431	5.8%	1,367,994	25.8%	154,807	21.8%
BLACK OR AFRICAN AMERICAN	430	1.0%	1,243,931	23.5%	51,001	7.2%
ASIAN**	7,140	17.2%	388,267	7.3%	52,559	7.4%
OTHER***	1,556	3.7%	276,882	5.2%	33,424	4.7%
TOTAL POPULATION	41,616	100.0%	5,298,497	100.0%	710,368	100.0%

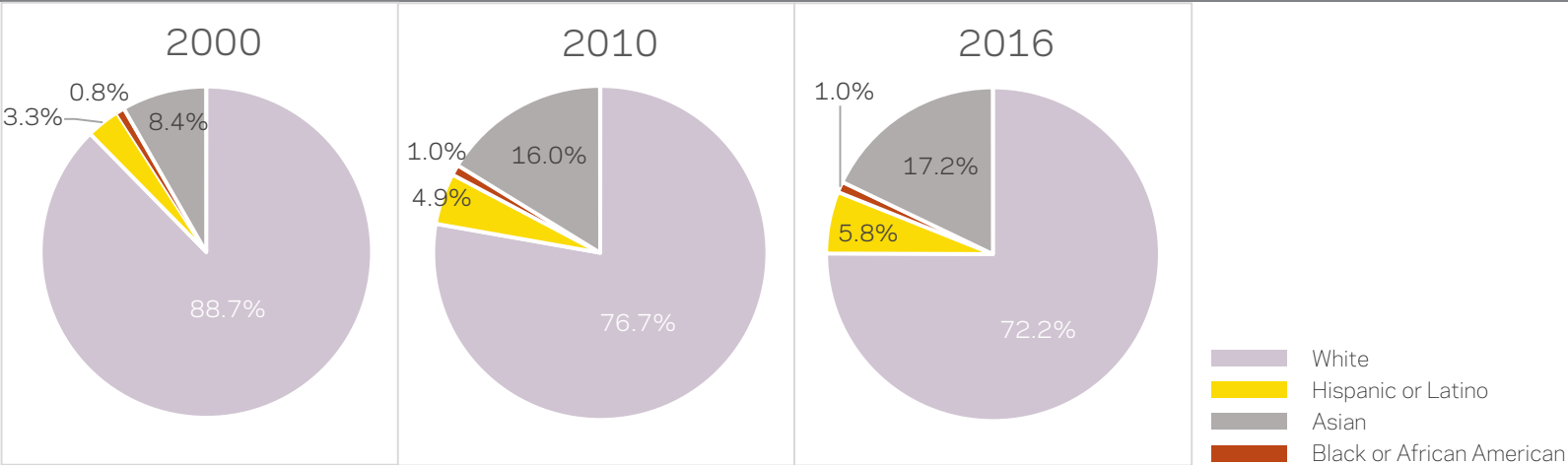
\*Includes Hispanic or Latino residents of any race

\*\*Includes Asian Indian, Chinese, Filipino, Japanese, Korean, Vietnamese, and Other Asian.

\*\*\*Includes American Indian and Alaska Native, Native Hawaiian and Other Pacific Islander, some other race, and two or more races

Source: U.S. Census Bureau, Census 2010. ESRI forecasts for 2016.

CHART 2.1 ESTIMATED RESIDENT POPULATION BY RACE BY YEAR (% , 2000, 2010, 2016)



Source: U.S. Census Bureau. ESRI forecasts for 2016.



EDUCATIONAL ATTAINMENT,  
EMPLOYMENT, AND INCOME

Relative to the surrounding communities and nation in general, the residents of Buffalo Grove are well educated: nearly all (97 percent) of Buffalo Grove residents have a high school diploma and the majority (64 percent) have a Bachelor’s degree or higher. These levels of education are higher than that of both Cook and Lake Counties.

The Village also boasts an unemployment rate of 4.5 percent (Q4 2016), which is lower than the surrounding counties. The leading employment sectors for Buffalo Grove workers are educational services, health care and social assistance industries, which employ 22.1 percent of Village residents. The second highest tier of employment sectors are the professional, scientific, management and administrative services industries that account for approximately 16.6 percent of residents.

Indicative of the relatively high educational attainment and low unemployment rates, the Village maintains high household incomes that exceed those of the surrounding counties. ESRI reports that the 2016 estimated median household income for Buffalo Grove is \$116,579, which is higher than the median household incomes in Cook County (\$55,251) and Lake County (\$78,206). Approximately 61.5 percent of Buffalo Grove households earn over \$100,000 compared to households in Lake and Cook Counties, which are 25.4 percent to 39.2 percent, respectively. These statistics reflect the strong spending potential of Buffalo Grove residents, which are further explored in the retail section of this report.

TABLE 2.4 ESTIMATED EDUCATION LEVELS (2016)

	Buffalo Grove		Cook County		Lake County	
	Count	Percent	Count	Percent	Count	Percent
POPULATION, 25 YEARS AND OVER	30,158	100%	3,581,577	100%	460,535	100%
HIGH SCHOOL DIPLOMA OR HIGHER	29,313	97.2%	3,076,575	85.9%	414,481	90.0%
BACHELOR’S DEGREE OR HIGHER	19,391	64.3%	1,318,020	36.8%	203,556	44.2%

Source: U.S. Census Bureau, Census 2010 Summary File 1. ESRI estimates for 2016.

TABLE 2.5ESTIMATED EMPLOYMENT STATUS (2015)

	Buffalo Grove		Cook County		Lake County	
	Count	Percent	Count	Percent	Count	Percent
POPULATION, 16 YEARS AND OVER	33,174	100%	4,173,224	100%	543,597	100%
IN LABOR FORCE	24,263	73.1%	2,761,294	66.2%	378,547	69.6%
EMPLOYED	22,763	68.6%	2,463,655	59.0%	338,959	62.4%
UNEMPLOYED	1,500	4.5%	296,577	7.1%	29,217	5.4%
NOT IN LABOR FORCE	8,911	26.9%	1,411,930	33.8%	165,050	30.4%

Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates.

TABLE 2.6 ESTIMATED EMPLOYMENT STATUS (2015)

	Buffalo Grove		Cook County		Lake County	
	Count	Percent	Count	Percent	Count	Percent
LESS THAN \$25,000	639	5.4%	463,890	23.9%	33,790	14.0%
\$25,000 TO \$49,999	1,069	9.1%	424,589	21.8%	43,385	17.9%
\$50,000 TO \$74,999	1,276	10.9%	328,904	16.9%	39,891	16.5%
\$75,000 TO \$99,999	1,536	13.1%	231,125	11.9%	30,291	12.5%
\$100,000 TO \$149,999	3,095	26.3%	258,409	13.3%	41,436	17.1%
\$150,000 AND OVER	4,138	35.2%	236,042	12.1%	53,633	22.1%
TOTAL HOUSEHOLDS	11,753	100%	1,942,959	100%	242,426	100%
MEDIAN HOUSEHOLD INCOME	\$116,579	---	\$55,251	---	\$78,026	---

Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates.



HOUSING UNITS

Most (69 percent) of the Village’s 16,829 housing units are single-family homes while the balance are multi-family buildings. Not surprisingly, Cook County has a higher percentage (53.9 percent) of multi-family units than Buffalo Grove (31.4 percent), while Lake County has a significantly lower percentage (19.5 percent). Such disparities can be attributed to the metropolitan area’s housing stock density pattern where density is greater closer to the central city. Approximately 78.1 percent of the occupied housing units are owner occupied while the remaining are renter-occupied units. This owner-occupancy rate is significantly higher than both Lake County (69.5 percent) and Cook County (50.1 percent) and is understandable given the high volume of single-family homes.

The housing market in the Village is fairly tight. Approximately 4.8 percent of the housing units in the Village are vacant, while 9.7 percent and 7.1 percent of homes are vacant in Cook and Lake Counties, respectively. Although sales appear to be run parallel to the school calendar, overall the housing prices remain competitive and the inventory is generally low. This trend has continued for the past few years and was highlighted in a *Crain’s* article which ran in March, 2017, which listed Buffalo Grove as one of the ten suburbs that have the smallest supply of homes for sale. According to the article, Buffalo Grove has approximately 1.9 months’ supply of inventory, while a balanced market has five to seven months of inventory. Another *Crain’s* article from 2015 named Buffalo Grove as the community with the fastest list-to-sell time in the Chicago region.

Factors contributing to the tight, competitive market include the excellent school districts, a strong park district and valued public safety services, as well as a Buffalo Grove’s reputation for being a tight-knit community. Additional factors include the pent up demand and other impacts from the housing recession, rising interest rates and the lack of local housing turnover as discussed earlier.

TABLE 2.7 ESTIMATED HOUSING UNITS (2015)

	Buffalo Grove		Cook County		Lake County	
	Count	Percent	Count	Percent	Count	Percent
SINGLE-FAMILY*	11,544	68.6%	987,755	45.7%	205,307	80.1%
MULTI-FAMILY (2 UNITS OR MORE)	5,285	31.4%	1,173,661	54.3%	50,865	19.9%
TOTAL HOUSING UNITS**	16,829	100%	2,161,416	100%	256,172	100%

*\*Includes attached and detached single family.*  
*\*\*Total, excluding mobile, boat, RV, van, etc.*  
*Source: U.S. Census Bureau, 2010-2015 American Community Survey.*

TABLE 2.8 ESTIMATED HOUSING OCCUPANCY AND TENURE (2016)

	Buffalo Grove		Cook County		Lake County	
	Count	Percent	Count	Percent	Count	Percent
OCCUPIED	16,401	95.2%	2,009,274	90.3%	245,881	92.9%
OWNER-OCCUPIED	13,455	78.1%	1,115,258	50.1%	183,929	69.5%
RENTER-OCCUPIED	2,946	17.1%	894,016	40.2%	61,952	23.4%
VACANT	827	4.8%	216,664	9.7%	18,910	7.1%
TOTAL HOUSING UNITS	17,228	100%	2,225,938	100%	264,791	100%

*Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016.*



SENIOR RESIDENTS IN BUFFALO GROVE

As noted in the demographic data, Buffalo Grove contains a high number of senior residents when compared to the demographics of Cook and Lake Counties. As discussed earlier in this analysis, many of these seniors are long-time residents who have raised their families in the community and choose to stay in Buffalo Grove. As these residents continue to age and look to downsize, they could represent residential development opportunities serving senior citizens and active retirees within the Lake Cook Corridor.

With two senior living facilities in Buffalo Grove, one of which is in the Lake Cook Corridor, there appears to be a limited supply of senior living options to accommodate local residents, especially those

who are still active. Table 2.9 demonstrates the difference in senior housing supply in Buffalo Grove relative to neighboring municipalities.

In Buffalo Grove, 17,478 residents, or 42.0 percent of the population, are 50 years of age or older. Between the Village’s two senior facilities there exist a total of 218 units of senior housing. This means that in Buffalo Grove, there exists only one unit of senior housing for every 80 senior residents in the Village. It should be noted however, that the Village does have a number of condominium units in the Corridor, and further south along Dundee Road, which attract active seniors although they are not restricted to seniors.

While neighboring Wheeling, like Buffalo Grove, has only two senior living facilities, the town does contain enough housing units to accommodate one out of 36 Senior Wheeling residents, which is a markedly greater proportionate supply of housing than that of Buffalo Grove’s. Furthermore, Arlington Heights, boasting the greatest number of senior residents of the municipalities surveyed, has sufficient housing units to accommodate one out of 28 senior residents in the area.

The large discrepancy of available senior housing between Buffalo Grove and those of neighboring cities signal that there may be a case to pursue targeted housing development that caters to the active adult. Rental units could also be considered in such discussions as the market for active senior rental market continues to grow; currently the Village has very little of this type of product. As the Lake Cook Corridor already contains a diverse tenant mix of doctors, medical office users and clinics and proximity to an urgent care facility, senior living developments would be a complementary and appropriate use.

TABLE 2.9 SENIOR CITIZENS AND UNITS OF HOUSING			
Municipality	Total Residents 50 Years or Older	Units of Senior Housing	Residents 50 + per Single Unit
BUFFALO GROVE	17,478	218	80
VERNON HILLS	8,649	769	11
WHEELING	13,157	367	36
ARLINGTON HEIGHTS	31,553	1,120	28
PALATINE	23,371	418	56

Source: U.S. Census Bureau, Census 2010 Summary File 1. ESRI forecasts for 2016.



## MARKET TRENDS AND LAKE COOK OUTLOOK

National demographic trends continue to focus on millennials and retirees, as these two demographic groups continue to grow in prominence. Think tanks are currently examining and projecting how these cohorts and their lifestyles will shape the future economy, commercial landscape and residential market. The increased demand for health and lifestyle services, experiential retail and smaller footages reflect the preferences of these two demographics.

As Baby Boomers are experiencing good health for extended periods of time, senior living facilities across the country are designed to attract this healthier group. For instance, more facilities across the country are offering independent living options to attract Baby Boomers that do not want assisted living services. Currently, the two senior living facilities in Buffalo Grove do not offer options for independent living.

The real estate findings suggest that there is a depth in the market for additional housing, especially those that could accommodate retirees as well as millennials. Moreover, the Lake Cook Corridor is an appropriate area to consider for such development as residential uses are adjacent to and contained within the corridor along with nearby health services. However, any such developments will likely need to contain smaller square footages, low maintenance

and numerous amenities such as walkability and proximity to retail desired by such populations. In recent studies by JLL, the most influential factor impacting young professionals' choice of residence is "proximity to dining and entertainment options."

### KEY FINDINGS:

- The Village's population tends to be older with higher educational attainment and lower unemployment rates than Cook and Lake Counties. Nearly all (97 percent) of Buffalo Grove residents have a high school diploma and the majority (64 percent) have a Bachelor's degree. The year-end 2016 unemployment rate was 4.5 percent.
- Buffalo Grove has an estimated median household income of \$116,579 and approximately 61.5 percent of Buffalo Grove households earn over \$100,000 compared to households in Lake and Cook Counties which are 25.4 percent to 39.2 percent, respectively.
- The Village has a low housing vacancy rate of 4.8 percent, and most of the housing stock is composed of single-family homes. In comparison to neighboring municipalities, Buffalo Grove has a low supply of senior housing units for its growing number of senior residents, which can make the case for pursuing targeted development that provide greater senior living options.
- Trends in senior living housing are geared towards independent living, as aging residents remain healthy and are living longer than previous generations. Furthermore, because the two existing senior living facilities do not offer independent living options, there emerges an opportunity in Buffalo Grove to fill a development gap to cater to the more active adult.
- The real estate findings suggest that there is a depth in the market for additional housing, especially those that could accommodate retirees as well as millennials. Moreover, the Lake Cook Corridor is an appropriate area to consider for such development as residential uses are adjacent to and contained within the corridor along with nearby health services. However, any such development may need to focus on smaller square footages, low maintenance and added amenities such as walkability and proximity to retail desired by such populations.



# OFFICE OVERVIEW

## LAKE COOK CORRIDOR OFFICE SNAPSHOT

Per JLL Research and CoStar data, approximately 26 percent or 543,000 square feet of the Village’s total office space is located in the Lake Cook Corridor. The majority of the office space in the Corridor is located in the Buffalo Grove Business Park, which is owned by Hamilton Partners. Buffalo Grove Business Park includes a series of single-story, three-story and four-story buildings located between Weidner Road and Arlington Heights Road along Lake Cook Road. Other office spaces within the Corridor are primarily single-story buildings, most of which are dedicated to medical office use.

The office stock within the Lake Cook Corridor is evenly distributed between Class A and Class B product, with limited Class C product. Class A offices are generally defined as those which offer newer or upgraded design, modern building systems and in-office amenities. Class B buildings are generally of an older stock with fewer building services. Class C buildings tend to provide only basic functionality for the low-cost user. As shown in Table 3.0, the Lake Cook Corridor has more Class B space, as a percentage of total local inventory, than the surrounding areas.

## LAKE COOK CORRIDOR OFFICE TENANTS

The tenant base within the Lake Cook Corridor is primarily comprised of small to mid-sized local firms. The Corridor attracts a range of professional service industries to the office space within the Business Park, such as local accounting firms, consulting firms, legal professionals and medical tenants.

This small tenant mix is somewhat unique within Buffalo Grove. Other office developments within the Village, such as Riverwalk, attract more of a corporate occupier base. The office campuses in northeast Buffalo Grove, along Deerfield Parkway, attract large international corporations (such as Siemens), which tend to locate in buildings which can meet their needs for office space combined with advanced manufacturing, assembly and distribution facilities.

## MARKET INDICATORS AND PERFORMANCE

The office space in the Lake Cook Corridor is performing adequately. It has a vacancy rate of 19.8 percent, which is higher than Buffalo Grove’s overall office vacancy rate of 12.6 percent but in line with the Chicago’s Suburban vacancy rate (19.1 percent).

Net office absorption in the Corridor (the amount of space within a market that is occupied in a given time period) was 1.46 percent in 2016. This level of absorption has generally been consistent through the economic recovery period since 2012 and is in line with the trend of the surrounding suburbs. In general, if a submarket can maintain annual positive net absorption in the range of 1.0 percent of inventory or greater, it is a sign that the local conditions are strong and improving. If net absorption falls below 1.0 percent (or goes negative), it is a clear indication that demand is declining, and that the regional economy or local product may be challenged in the near future.

The net office absorption rate in Lake Cook Corridor (1.46 percent) and in Buffalo Grove (1.28 percent) are higher than the Chicago Suburban Market (0.75 percent). Such findings imply that the Corridor and Buffalo Grove are on the path to lower vacancy and continued improvement in the office market. Small and midsized tenants continue to be most responsible for the space absorption and leasing demand in the Lake Cook Corridor.



TABLE 3.0 SUBURBAN OFFICE SPACE ALLOCATION BY BUILDING CLASS, 2016

	Lake Cook Corridor	Buffalo Grove	Chicago Suburbs	U.S. Suburbs Total
TOTAL INVENTORY, IN SQUARE FEET	542,832	2,118,335	102,008,716	2,552,198,361
CLASS A INVENTORY, IN SQUARE FEET (% OF TOTAL)	260,069 (48%)	1,088,963 (52%)	54,540,242 (54%)	1,354,153,437 (53%)
CLASS B INVENTORY, IN SQUARE FEET (% OF TOTAL)	267,763 (49%)	875,878 (41%)	39,573,830 (38%)	1,127,261,236 (44%)
CLASS C INVENTORY, IN SQUARE FEET (% OF TOTAL)	15,000 (3%)	153,494 (7%)	7,894,644 (8%)	70,783,688 (3%)

Source: JLL Research, CoStar.

TABLE 3.1 OFFICE MARKET STATISTICS, 2016

	Lake-Cook Corridor	Buffalo Grove	Chicago Suburban	U.S. Suburban
TOTAL INVENTORY, IN SQUARE FEET	542,832	2,118,335	102,008,716	2,552,198,361
VACANCY RATE	19.80%	12.60%	19.10%	16.00%
AVERAGE GROSS RENT (\$ PER SQUARE FOOT, PER YEAR)	\$21.91	\$23.62	\$23.98	\$27.23
INVENTORY UNDER CONSTRUCTION, AS A % OF INVENTORY	0.00%	0.00%	0.58%	2.33%
2016 ABSORPTION, AS A % OF INVENTORY	1.46%	1.28%	0.75%	1.25%

Source: JLL Research and CoStar.

In general, Buffalo Grove and the Lake Cook Corridor offer office rental rates that are slightly more affordable than the surrounding area. This is reflective of the elevated level of Class B inventory and is potentially a competitive advantage for the submarket. Table 3.1 illustrates the spread between Buffalo Grove office rents and those of the surrounding suburbs.

The Lake Cook Corridor’s fair performance is heavily influenced by a variety of strengths, weaknesses and other key market dynamics. One of the Corridor’s greatest strengths is its regional location. Buffalo Grove, and specifically the Lake Cook Corridor, can effectively draw employees from the eastern or western portions of the northern suburbs. This area contains one of the most highly talented labor pools in the Chicago region. Moreover, the pricing is reasonable for suburban office product. This is a great advantage for cost-conscious occupants. Finally, the available office spaces are of a quality level that is suitable for most tenants. In recent tenant surveys, very few employees expressed any concerns on the quality of the specific office spaces.

The Corridor’s strengths are tempered by key drawbacks, the first of which is the Corridor’s lack of direct accessibility to the highway and mass transit networks. JLL Research has determined that on a national basis, transit-oriented suburban office locations generally have a vacancy rate that is 5.0 percent lower than those office locations that have no mass transit access, such as the Lake Cook Corridor. At the same time, the Lake Cook Corridor is approximately five miles from the



closest interstate highway exit and JLL Research has determined that suburban offices with direct highway access have vacancy rates that are 3.5 percent lower than suburban offices that are greater than one mile from any highway exit. In several discussions with local office building owners and tenants, access to the corridor and traffic along Lake Cook Road were the most frequently stated points of concern for the local office.

Another weakness of the Lake Cook Corridor's office space is the age of the facilities. Most of the office space was built in the 1980s, placing them in the second generation of use. Although they are performing adequately now in the market, the space will need to be updated with modern office design, formats and amenities to stay competitive in the market.

Another weakness of the Lake Cook Corridor's office space is the limited base of amenities that exist within the Corridor. In a recent (March 2016) JLL survey of over 1,600 Chicago suburban professionals, nearby "dining and entertainment options" ranked as the top factor in rating the attractiveness of a particular office location. The dining and entertainment options provided for office workers in the Corridor are limited. This conclusion was validated in discussions with office building owners such as Hamilton Partners who indicated that the retail vacancy at Chase Plaza and the limited amenity base in the Corridor have had a negative impact on their leasing efforts.

## OFFICE MARKET TRENDS

The regional suburban office market is currently facing a series of emerging trends, all of which impact the office space within the Lake Cook Corridor.

One key trend is the growing prominence of build-to-suit office construction. In the Northwest Chicago suburbs, there are two projects underway totaling 368,000 square feet of office space. In the Western suburbs, there is one project under construction which will deliver 228,000 square feet. Notably, all three of these projects are build-to-suit developments. This means that the developments are designed to the exact specifications of the tenants that will occupy them, and they imply that companies are not finding the properties or locations that meet their needs, even in a market with high vacancy. The most recent build-to-suit delivery was Zurich North American Insurance's 753,000 square-foot headquarters in Schaumburg. This project is a perfect example of the growing trend of companies seeking spaces and locations that are customized to their demands. Build-to-suit developments will continue to gain momentum in the market and present additional competition for existing and older office space, such as those in the Corridor and Buffalo Grove.

Another key trend is corporate urban migration. Since 2012, JLL Research has tracked 83 suburban companies that have either relocated to downtown Chicago or opened satellite offices within the city. These companies have left nearly five

million square feet in the suburbs and now occupy nearly six million square feet downtown. Much of this migration is due to the preferences for a younger labor pool. Companies moving to downtown cite convenience, local innovation and access to a large and skilled workforce as key factors. This migration from the suburbs to downtown has affected each submarket in the suburbs, including the West and North suburbs. In order to retain and attract talent, many suburbs are examining different strategies for tenant retention, including improved transportation systems and enhanced local amenities.

A final trend facing the suburban office market is the push towards modern office space designs as well as building amenities. Recognizing that suburban office properties must remain competitive beyond price, several owners have taken measures to update their offices in recent years. Throughout the suburbs, office owners are working to renovate their spaces to meet current demands for loft, flex and/or open-format office space. In addition, office owners are refurbishing their buildings to provide tenants with building amenities to attract businesses. The top amenities include state-of-the-art fitness facilities, modern cafeterias and outdoor/gathering spaces. Tenants frequently state that if these amenities are not offered within their building, they must be available within walking distance of their office.



## LAKE COOK CORRIDOR OFFICE OUTLOOK

As described above, the office space in the Lake Cook Corridor is performing adequately. It continues to rely on its strengths of regional location, building condition and affordable rental prices to occupy its spaces.

However, for the Lake Cook Corridor's office space to remain competitive in the market, those weaknesses and trends that can be realistically addressed should be explored. From a building and development standpoint, that means adding or redeveloping office facilities to include for loft, flex and/or open-format office space as well as state-of-the-art fitness facilities, modern cafeterias and outdoor/gathering spaces and other appropriate amenities. Moreover, it is important to enhance the general environment of the Corridor which includes providing more robust walkable retail and restaurant options.

Other trends such as highway and mass transit accessibility and corporate urban migration are outside the control of developers, office property owners and tenants, as well as the Village. However, the driving forces behind these trends, such as the importance of accessibility and attracting young talent, should be recognized. The Corridor may not be able to have direct access to mass transit in the near future, but perhaps connections to mass transit should be considered. The Corridor can never fully compete with the young talent's affinity for

the density and vitality of downtown Chicago, but creating walkable lively business districts attractive to young professionals should be considered in any future plans for the Corridor.

Although the current market dynamics suggest that additional net office space may not be supported, a Corridor that offers modern office space and amenities, walkability, and connections to road and mass transit networks, could lead to market conditions that would support new or redeveloped office space in the future. In the case of the Corridor, public investment in access and amenities could stimulate eventual private investment in the local office sector.

## KEY FINDINGS:

- The Lake Cook Corridor has approximately 543,000 square feet of office space, which represents roughly a quarter of office space in the Village. The majority of the Corridor's office stock is evenly distributed between Class A and Class B product.
- The office space in the Lake Cook Corridor is performing adequately with a vacancy rate of 19.8 percent and net absorption of 1.46 percent in 2016. The average rental rates are approximately \$22 per square foot.
- The Lake Cook Corridor's fair performance is heavily influenced by a variety of strengths (regional location, proximity to talented labor pool, affordable pricing and appealing office space) and weaknesses (lack of direct accessibility to the highway and mass transit networks and lack of amenities).
- The Lake Cook Corridor and the rest of the regional suburban office market is currently facing a series of trends including: growing prominence of build-to-suit office construction, corporate urban migration and an increasing focus on building amenities.
- Office space in the Lake Cook Corridor will continue to rely on its strengths to occupy its spaces. However, for the Lake Cook Corridor's office space to remain competitive in the market, those weaknesses and trends that can be realistically addressed should be explored. Although additional net office space may not be supported given current market dynamics, a Corridor with modern office space and amenities, walkability and connections to road and mass transit networks could create market conditions to support new or redeveloped office space.

# INDUSTRIAL OVERVIEW

## INVENTORY, MARKET INDICATORS AND PERFORMANCE

Per JLL Research and CoStar data, Buffalo Grove’s industrial inventory is approximately 6.85 million square feet, all of which is located to the East and Northeast of the Lake-Cook Corridor. This industrial property is faring well in the market. The industrial vacancy rate in the Village is 4.1 percent, which is significantly lower than both the Chicagoland average (6.9 percent) and U.S. average (5.8 percent), as shown in Table 4.0. Moreover, Buffalo Grove’s average gross rent for industrial properties is almost double that of the Chicago Metropolitan Area, indicating the high demand for this type of product in the Village.

A total of 1,347 square feet of positive absorption occurred in Buffalo Grove through the third quarter of 2016. While this is a low rate relative to the Chicagoland and U.S. averages, it is reasonable considering the extremely low vacancy rate in the market. Buffalo Grove industrial properties are very well leased, and the recent pattern of low absorption is simply a reflection of the stability of the market. Currently, the Village has approximately 200,000 square feet of industrial space under construction, which is 2.91 percent of its total current inventory. These indicators signal the strength of Buffalo Grove’s regional position in the industrial market. A key asset to the community’s industrial properties

TABLE 4.0 INDUSTRIAL MARKET STATISTICS

	Lake Cook Corridor	Buffalo Grove	Chicago Metropolitan Area	U.S.
INVENTORY, IN SQUARE FEET	0	6,850,512	1,132,039,878	12,292,765,851
VACANCY	0.00%	4.10%	6.90%	5.80%
AVERAGE GROSS RENT	n/a	\$8.78	\$4.84	\$5.13
UNDER CONSTRUCTION, AS A % OF INVENTORY	0.00%	2.91%	1.74%	1.64%
2016 ABSORPTION, AS A % OF INVENTORY	0.00%	0.01%	1.04%	1.57%

Source: JLL Research and CoStar data.

is its regional geographic location - right on the edge of Cook and Lake Counties. As noted in the Buffalo Grove Economic Development Strategic Plan Market Assessment, the industrial developments can draw from Cook County’s employment and industrial base stemming from Chicago. However, its Lake County location enables these properties to enjoy a more advantageous tax structure.

Unlike Cook County, which assesses industrial properties at higher percentage of market value than residential properties, Lake County offers a more equitable tax structure. This tax advantage has lead to an overall flight of industrial businesses from Cook County to Lake County and other nearby counties.



## LAKE COOK CORRIDOR DEVELOPMENT OUTLOOK

Buffalo Grove's strong position in the tight industrial market appear to make the case for industrial development in the Lake Cook Corridor. However, the Corridor's locational attributes suggest that industrial is not the highest and best use of this area. The Corridor is surrounded by less intense uses such as residential developments and the Lake County Forest Preserve. Second, the Lake Cook Corridor lacks direct access to highways, which is a desirable characteristic of today's industrial development. This accessibility is especially key for logistics and distribution centers, which are on the rise given the uptick in e-commerce.

Although industrial development isn't appropriate in the Lake Cook Corridor, the future of the Corridor could benefit from the Village's strong industrial centers. According to the US Census Bureau 2014 estimates, Buffalo Grove's industrial centers employ over 5,000 workers, and approximately 90 percent of them live outside the Village. Such findings give additional credence to the Jobs-Housing Spatial finding first raised in the Buffalo Grove Economic Development Strategic Plan Market Assessment. This mismatch refers to the phenomenon where homes conducive to workers' preference and affordability are situated far from their employment centers. As the millennial generation will continue to emerge as a larger portion of the Buffalo Grove workforce, especially in the advanced manufacturing businesses, the Village should consider housing for this demographic. The Lake Cook Corridor is an appropriate and feasible place to provide such housing as well as retail for these workers who represent a potential pool of residents and/or retail patrons.

## KEY FINDINGS

- Buffalo Grove's industrial inventory is approximately 6.85 million square feet, all of which is located to the East and Northeast of the Lake-Cook Corridor. This industrial property is faring well in the market with a low vacancy rate, sufficient absorption rates and approximately 200,000 square feet under construction.
- Industrial development is not considered appropriate in the Lake Cook Corridor given its locational attributes. However, the future of the Corridor could benefit from the Village's strong industrial centers. Buffalo Grove's industrial centers employs over 5,000 workers, which represent a potential pool of residents or customers that can help support residential and commercial uses that are more appropriate and feasible for the Corridor

# RETAIL OVERVIEW

## LAKE COOK CORRIDOR RETAIL SNAPSHOT

The Lake Cook Corridor is an important retail corridor in Buffalo Grove. The Corridor’s 574,000 square feet represents approximately 32 percent of the total retail inventory in the entire Village. The majority of the retail space in the Corridor is clustered at the western or eastern ends of the study area. The western cluster includes other individual retail single-story retail buildings such as PNC Bank, Burdeen’s Jewelry, Buffalo Restaurant, Countyline Tavern and the former Outback as well as the 93,308 square foot Chase Plaza. Albertsons Companies, which is the parent company of Jewel-Osco grocery stores, owns the anchor portion of Chase Plaza through their real estate division called Safeway Realty Holdings. The plaza’s largest space (61,650 square feet) is the former Dominick’s grocery store and has been vacant for over three years.

The eastern cluster includes the Buffalo Grove Town Center development and the Grove Shopping Center as well as smaller commercial plazas such as Buffalo Grove Shoppes and individual commercial buildings such as Deerfield’s Bakery, Lou Malnati’s and the Shell Gas Station. The Town Center, which is the most prominent commercial development at the intersection of McHenry Road and Lake Cook Road, comprises of single-story buildings anchored by a bowling alley at the north end and various food and beverage outlets at the south end.

Both the Buffalo Grove Town Center and Chase Plaza exhibit an auto-oriented design that was more common during the time of their development (mid 1980s to early 1990s). Chase Plaza opened in October of 1985 and maintains most of its original appearance. Buffalo Grove Town Center, although developed a few years later, lacks clear access points, street visibility and walkability. It is oriented away from Lake Cook Road towards large parking lots and has no unifying theme to its design or layout. The physical condition of the assets shows age and deterioration in the exterior finishes and public-facing elements.

TABLE 5.0 RETAIL MARKET STATISTICS, 2016				
	Lake Cook Corridor	Buffalo Grove	Chicago Suburban	U.S. Suburban
TOTAL INVENTORY, IN SQUARE FEET	574,276	1,800,997	255,749,481	10,485,381,153
VACANCY RATE	17.4%	11.9%	8.0%	7.9%
AVERAGE RENT (\$ PER SQUARE FOOT, PER YEAR)	\$17.10	\$16.33	\$15.44	\$16.54
2016 ABSORPTION, AS A % OF INVENTORY	-0.67%	0.36%	0.88%	1.01%

Source: JLL Research and CoStar data.



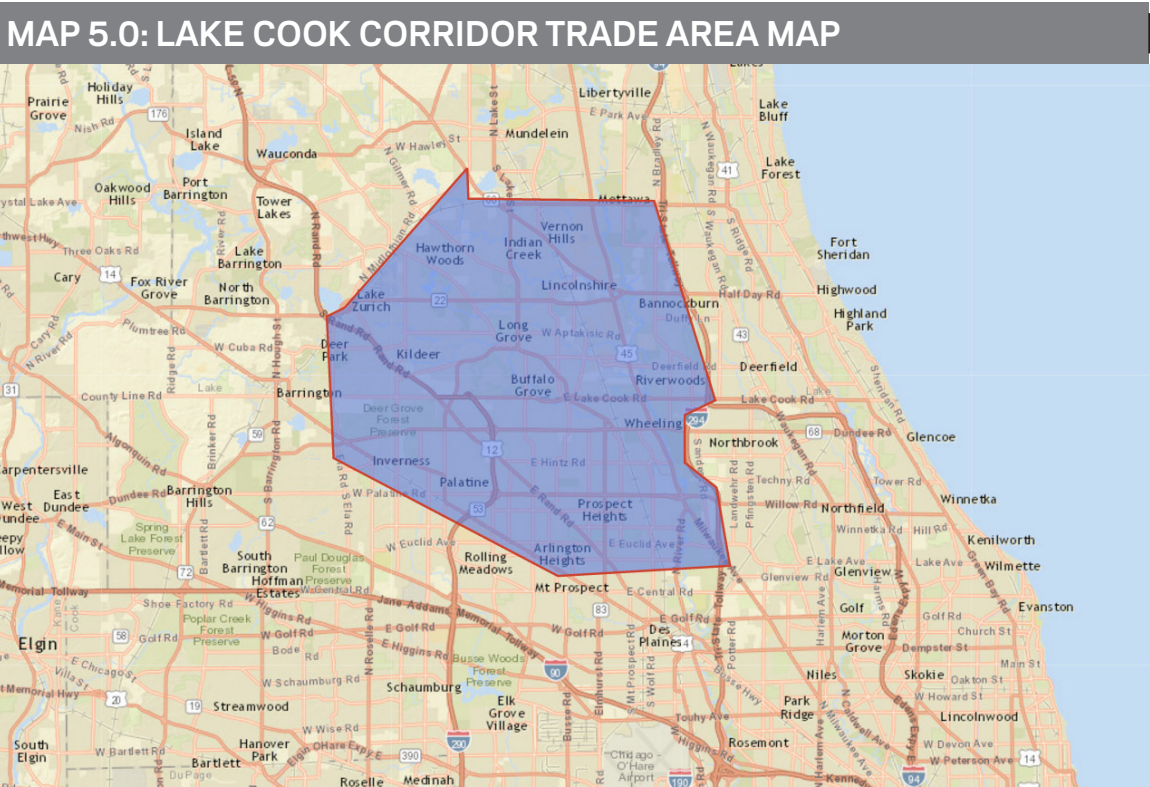
MARKET INDICATORS  
AND PERFORMANCE

As a whole, the retail space in the Lake Cook Corridor is underperforming when compared to the rest of Buffalo Grove and the surrounding suburbs. The Corridor has a vacancy rate of 17.4 percent, which is higher than overall retail vacancy rate in Buffalo Grove (11.9 percent) and the Chicago Suburban market (8.0 percent). These rates do not include the recent announcement of Binny’s Beverage vacating their 14,000 square foot space in Town Center for a retail center just down the street in Wheeling. It also does not include the recent closing of Title Boxing (9,000 square feet) in Town Center. These two vacancies will increase the Corridor’s vacancy rate to around 21 percent. The Corridor’s relatively high vacancy rate is largely attributable to the vacant Dominick’s in Chase Plaza. When the Dominick’s property is excluded from the inventory, the Corridor’s current vacancy rate is significantly less.

Since 2013, the Lake Cook Corridor has shown an annual negative net absorption rate, while the overall retail absorption in Buffalo Grove has been positive (between 0.36 to 0.99 percent). In other words, while the Lake Cook Corridor has experienced an overall increase in vacancy over the past few years, the surrounding Village has experienced an uptick in retail occupancy. The average asking rental rates

within the Corridor (\$17.10) are slightly above the average rates in all of Buffalo Grove (\$16.33) and the surrounding suburbs (\$15.44).

In order to assess the existing retail offerings within the Lake Cook Corridor, a preliminary retail leakage and surplus analysis (or gap analysis) was conducted. In such an analysis, JLL utilized a trade area based upon a 15 minute drive time that is adjusted for physical, transportation and psychological barriers. ESRI Business Analyst supplied the data for this analysis and showed potential areas of retail opportunity for the Lake Cook Corridor include: motor vehicle and parts dealers, food and beverage stores, food and drinking establishments, health and personal care stores and gas stations.



(based on approximate 15-minute drive time radius, per ESRI data 2016)

TABLE 5.1 LAKE COOK CORRIDOR TRADE AREA	
TOTAL POPULATION (2016)	307,110
MEDIAN HOUSEHOLD INCOME	\$81,503
Household Distribution by Income	
<\$24,999	11.8%
\$25,000 - \$49,999	17.3%
\$50,000 - \$99,999	30.4%
\$100,000 - 149,999	18.5%
>\$150,000 - \$199,999	22.0%
Aggregate Spending Power of Consumers within Trade Area	\$11,029,643,395

## STRENGTHS AND CHALLENGES FOR RETAIL IN THE LAKE COOK CORRIDOR

Although the retail development in the Corridor is underperforming, it has much potential. Perhaps one of the largest factors contributing to the underperformance is the Corridor's outdated and poor design, particularly Town Center and Chase Plaza. Such developments are oriented away from Lake Cook Road and/or set extensively back from Lake Cook Road behind a sea of parking. Moreover, they are auto-oriented, and lack connectivity, walkability, wayfinding signage and integration with the surrounding area. They do not help establish an identity for the individual developments or the area as a whole.

In addition to design, the Corridor's retail properties are competing with a variety of retail developments. Some of these developments include general merchandise big box stores such as Target, Walmart and Sam's Club, all of which are just a few hundred feet from the edge of the Corridor. Other nearby competing shopping centers include Deer Park Town Center in Deer Park, the Dundee Corridor in Wheeling, the Uptown Shopping District in Arlington Heights, and the Rand-Dundee Corridor in Palatine. These shopping centers offer a variety of retail tenants including formal dining eateries, fast casual dining options, independent retailers, larger chain stores, and department stores. Although they vary in format, all are considered fairly successful and compete with the Corridor. It should be noted that three of the four areas (Palatine, Arlington Heights, and Wheeling) has the assistance of tax increment financing (TIF).

Property ownership expectations and dynamics are also a key factor in shaping the Corridor's retail landscape and performance. This is best exemplified by examining Town Center and The Grove shopping centers. Both developments are older, in the same geographic location and are oriented away from Lake Cook road towards McHenry Road. However, the Grove Shopping Center has nearly a 100 percent occupancy rate for its 120,000 square feet, while Town Center struggles to fill its 194,000 square foot center and retain some of its prime tenants such as Binny's Beverage, who recently announced they are leaving the shopping center. With Binny's and Title Boxing Club's departure, the development will post a high vacancy rate (25 percent). At the same time, the former Dominick's store in Chase Plaza is owned by the parent company of Jewel-Osco grocery stores which has little incentive to fill the space given the Jewel-Osco store down the street. These types of ownership issues and dynamics need to be recognized and explored as an important factor in the Corridor's retail landscape.

While traffic has been cited as a sense of frustration for patrons of the corridor, it is also one of the corridor's greatest strengths. Lake Cook Road has a traffic count of approximately 40,000 vehicles per day, while Dundee Road has approximately 27,700 vehicles a day. As retailers value visibility, such traffic volume is desirable for commercial development. However, this high volume is problematic as it exceeds the road's capacity and results in congestion thus proving to be difficult to traverse for the Corridor's customers. The planned Lake Cook Road Expansion project, which is a

Cook County Project that is slated for 2018/2019, will provide greater road capacity. However, the widening may also create a greater barrier between property to the north and south of Lake Cook Road.

In addition to excellent visibility, the retail potential for the Lake Cook Corridor is the trade area's demographics. The Lake Cook Corridor's trade area draws from neighboring communities and includes approximately 120,000 households which have a median household income of \$81,503, which is less than the Village's overall median household income of \$116,579. Moreover, it has a strong daytime population with the Corridor's office developments which employ a several hundred workers as well as the Village's industrial centers with over 5,000 workers.

The Corridor's retail potential is also found in its advantageous location straddling Lake and Cook Counties. Approximately 90 percent of the Corridor falls in Lake County, enabling these properties to better compete with nearby Cook County properties and businesses with more favorable sales and property tax rates. Lake County's sales taxes for general merchandise are 2 percentage points lower than Cook County, while qualifying food and drug is 1 percentage point lower. Moreover, the 2015 median effective commercial property tax rate in Cook County was approximately double the median effective commercial property tax rate in Lake County.



## RETAIL MARKET TRENDS

While the Lake Cook Corridor looks to overcome its challenges and fulfill its potential, it should be cognizant of emerging national retail trends. A key retail trend is the shift toward housing retail in lively, mixed-use destinations. The market is generally moving away from single purpose developments, such as strip malls and enclosed shopping centers, and towards mixed-use destinations centers. Such centers feature densities and a mix of uses (residential, open space, office and commercial) to create energy, provide critical mass and foster an urban feel in a suburban setting. Key to these developments is its seamless integration of uses under a unifying development design which ties into the surrounding area. Successful mixed-use destinations create an identity for a community and become a social gathering place and civic hub. They are particularly favorable to millennials who are looking to leave the city for suburban living but would like to maintain the convenience and accessibility they have grown accustomed to in urban environments.

An underlying component of the mixed-use destination centers is walkability. Studies have found that walkability in suburban retail centers leads to increased retail sales, property values, and occupancy rates. Recently, several studies have demonstrated that increased foot traffic leads to increased retail sales. Walkability has clear benefits for landlords and developers. The Urban Land Institute estimates that “a 10 point increase in a property’s walk score translates into five to

eight percent increase in that property’s value.” Furthermore, a recent academic paper (2016) by the University of Arizona declared that “all else being equal, the benefits of greater walkability were capitalized into higher retail and apartment values by up to 9 percent.”

As walkability is on the rise, parking visibility is on the decline. Destination mixed-use and other commercial centers are moving away from the large surface area parking lots in front of their retail stores and commercial businesses. Today’s centers are now accommodating parking by integrating it into development, utilizing screening and otherwise reducing its visibility so that developments and centers are more pedestrian-oriented instead of auto-oriented.

In addition to the external environment, the retail market is also experiencing a shift in retail marketing and operations. Today’s retailers are moving towards experiential retail and focusing on the customer’s experience. According to Elite Wealth Management, there were 34 billion visits to U.S. stores in 2010; by 2015, that number was below 17 billion – essentially reduced by half. Research is finding that to attract customers and generate sales in-store, the customer must now have a memorable experience, either based on the level of customer service, the ability to interact with the products or the uniqueness of the design. According to a 2016 survey conducted by the National Retail Federation, the “in-store experience” is now the single most

important factor in determining whether or not a customer will return to a retail outlet after an initial visit.

The move towards experiential retail can be seen in the grocery shopping. Grocery store chains such as Whole Foods have started to include meeting areas, alcohol and coffee bars and wifi in their layout. In doing so, they are effectively turning their grocery visit into places to socialize, work and relax, as well as shop. Grocery stores are finding that integrating multiple formats helps them stay ahead of the competition. Other examples of retailers that focus on their customer experience include:

- Sporting goods stores, which integrate climbing walls or fishing demonstrations
- Outdoor outfitters, which offer classes, training and group events or trips
- Home improvement stores, which provide do-it-yourself project instruction or clubs
- Clothing retailers, which offer sophisticated fittings or personal advisors

In addition to offering customers a meaningful experience, many retailers are also offering on-line shopping and in-store pick options for their customers. In doing so, their stores become a crucial link in retail supply and distribution. E-commerce continues to grow in its share of retail sales, however it still represents only 9.5 percent of total retail sales. Consequently, creating a welcoming and relevant retail environment has become more important than ever.

### RETAIL MARKET TRENDS (CONT.)

Beyond the procurement of goods, the focus on customer experience has extended to the realm of services and entertainment. New cinemas and theaters now offer in-house dining and alcoholic beverages, along with concerts, lectures and live performances. According to a 2015 Washington Post analysis, luxury movie theaters have experienced a growth rate that is double that of standard theaters. In the realm of fitness, the fastest growing segment of the industry is sport-specific training studios such as spin classes, yoga studios and pilates, which offer their clients a customized experience beyond that of a traditional gym. This continued preference for experiential retail is specifically important to young professionals who are willing to spend more on fitness, dining and entertainment, and this trend appears poised to continue.

A final key trend impacting the retail environment is the explosive growth of fast casual dining options. Fast casual dining is defined as a restaurant type that does not offer a full-service (wait-staff based) experience, but promises higher quality and customized food options compared to a fast food restaurant. Per the global research firm Euromonitor International (2016), fast casual dining was the fastest growing segment of the entire food service industry at an annual rate of 10.4 percent, while the food service industry grew at a rate of 5.7 percent. While this trend has been noted nationally, it has had significant impact in the Chicago metropolitan area. As consumers continue to increase their likelihood to dine outside the home, and seek quality in their food and experience beyond that of a fast food restaurant, the growth of the fast casual industry is expected to grow further in the next several years.

### LAKE COOK CORRIDOR RETAIL OUTLOOK

The retail space in the Lake Cook Corridor is underperforming. It has high vacancy rates and negative absorption, and it is at the risk of additional decline in economic performance. In order for the Corridor to attract enhanced retail and become a growth engine for Buffalo Grove, new development is necessary. This vision must show development conducive to today's defining trends of the destination environment, experiential retail and walkability. It should be sure to incorporate a mix of uses that include residential for critical mass as well as retail tenants that attract patrons to spend a few hours in the area rather than a quick trip.

The vision must also focus on meeting the needs of the robust residential and employee base in Buffalo Grove, while being mindful of the competition that exists in nearby corridors. This may require the attraction of non-traditional retailers that transform the Corridor into a destination with a unique retail mix that is not found elsewhere in proximity.

### KEY FINDINGS:

- The Lake Cook Corridor has approximately 574,000 square feet of retail space, which represents roughly one third of retail space in the Village. The majority of the Corridor's retail space is located within the two centers of Buffalo Grove Town Center and Chase Plaza.
- The retail space in the Lake Cook Corridor is underperforming relative to the rest of Buffalo Grove and the surrounding competing suburbs. The vacancy rate exceeds the local and regional suburban rates and net absorption is negative.
- The Lake Cook Corridor's retail performance is negatively influenced by its outdated and poor design, nearby competition, ownership dynamics and accessibility issues. However, the Corridor does have the benefits of high traffic exposure, good trade area demographics and favorable tax conditions.
- The retail market is experiencing a variety of trends including the rise of: mixed-use destination centers, walkability, experiential retail and entertainment, and fast casual restaurants.
- In order for the Corridor to attract enhanced retail and become a growth engine for Buffalo Grove, a new development is necessary. This vision must show development conducive to today's defining trends of the destination environment, experiential retail and walkability. It should be sure to incorporate a mix of uses that include residential for critical mass as well as retail tenants that attract patrons to spend a few hours in the area rather than a quick trip.



# HOTEL AND HOSPITALITY OVERVIEW

## LAKE COOK CORRIDOR HOTEL SNAPSHOT

There are two hotels located in the Village of Buffalo Grove and one within the Lake Cook Corridor. The Four Points by Sheraton is located at 900 West Lake Cook Road and functions primarily as a business hotel, serving the needs of local travelers to the Buffalo Grove Business Park and other businesses nearby. The hotel has 152 rooms and is managed under the Starwood Hotels & Resorts brand.

Recently repositioned and rebranded, the Four Points by Sheraton appears to be in good condition. It offers on-site parking and free shuttle service within five miles of the hotel. Local and regional businesses and professional associations hold events and meetings in the hotel’s three meeting rooms totaling 1,600 square feet. Outside of the Lake Cook Corridor at 1525 Busch Parkway is an Extended Stay America Hotel. The two hotels in Buffalo Grove have a combined total of 274 rooms.

## LAKE COOK CORRIDOR HOTEL USERS

The Four Points hotel caters primarily to local business travelers and personal travelers visiting family and acquaintances within the Village. The hotel management reports that the current guest mix is approximately 60 percent business travelers and 40 percent personal travelers, with significant variation week to week. This mix of personal and professional patrons is typical for a hotel of this size in the Chicago suburbs.

## MARKET INDICATORS AND PERFORMANCE

The hotel offering within the Lake Cook Corridor is performing adequately. Based on the volume of office space and attractions in the region, an average hotel occupancy rate in range of 60 percent to 70 percent is expected and indicates that the market may not likely support new rooms.

In general, Buffalo Grove and the Lake Cook Corridor offer hotel room rates that are slightly above the suburban average. This is reasonable considering the wide spread of hotel quality and pricing across the suburbs.

TABLE 6.0 HOTEL MARKET STATISTICS, 2016			
	Lake Cook Corridor	Buffalo Grove	Chicago Suburban
TOTAL INVENTORY, NUMBER OF ROOMS	152	274	79,690
OCCUPANCY RATE	64.0%	63.1%	69.1%
AVERAGE ROOM RATE (\$ PER ROOM, PER NIGHT)	\$104.00	\$94.50	\$89.98

Source: JLL Research, CoStar, and hotel reporting.

Beyond pricing, the Lake Cook Corridor’s hotel performance is most heavily influenced by its location. As stated earlier this report, one of the Corridor’s greatest strengths is its regional location. Buffalo Grove and specifically the Lake Cook Corridor can effectively draw employees and guests from the eastern or western portions of the northern suburbs. For business travelers, it is important to note that the Corridor is only seventeen miles from O’Hare International Airport, and this provides a relatively convenient and cost-effective option for those conducting business in the northwest suburbs.

However, the specific location of the hotel is also challenging. The Corridor lacks direct accessibility to the highway and mass transit networks, and this condition immediately reduces the number of unplanned visits. Hotels which are located adjacent to highways and exits gain the benefit of signage, increased visibility and traveler awareness. Even along Lake Cook Road, the visibility of the hotel is limited and many casual drivers along the Corridor may not acknowledge its presence.

Another attribute of the Lake Cook Corridor which impacts the demand for hotel rooms is the limited base of amenities and attractions that exist within the Corridor. Beyond the Buffalo Grove Business Park, there are few direct reasons for a traveler to select the Four Points hotel for a visit, as opposed to another suburban hotel property.

TABLE 6.1 COMPARABLE CITY HOTEL OVERVIEW				
City	Number of Hotels	Total Rooms	Residents per Room	Class
BUFFALO GROVE	2	274	151	1 Two-Star, 1 Three-Star
WHEELING	3	693	54	1 Three-Star, 1 Four-Star
LINCOLNSHIRE	6	954	8	4 Three-Star, 2 Four-Star
ARLINGTON HEIGHTS	9	1,408	53	5 Three-Star, 1 Four-Star

Source: JLL Research.

In order to understand the Corridor hotel market relative to the surrounding area, an analysis of several adjacent suburbs was completed. As indicated in Table 6.1, Buffalo Grove has fewer hotel rooms than its comparable neighbors.

This disparity in hotel rooms is reasonable, as the number of hotels within a given location is generally proportional to the inventory of office space within area and/or the volume of local tourist attractions. Buffalo Grove has a smaller office inventory than Lincolnshire given their higher amount of corporate office space. Wheeling’s total rooms are mostly attributed to the newer Westin Hotel on Lake Cook Road, while Arlington Heights has both a large office inventory and the attraction of the Arlington Race Course. Regardless, it is noteworthy that the surrounding suburbs have far more rooms, on a proportional basis, to their population.

### HOTEL MARKET TRENDS

The hotel market is currently facing a series of emerging trends which may influence the future demand for hotel space within the Lake Cook Corridor.

One notable trend is the emergence of boutique and independent hotels. While primarily an urban rather than suburban trend, the fastest growing segment of the hotel industry over the past five years has been that of independently-branded properties. Boutique hotels tap into the trend of customization and individuality that has been noted in earlier sections of this report. Modern consumers, and particularly young professionals, consistently express their preference for experiences that are tailored to them and less conventional than that of a standard hotel chain.



A second critical trend impacting the hotel market is the rise of home sharing and short-term rentals. Web-based services such as AirBnB and Home Away have begun to disrupt the hotel industry, which formerly relied only on licensed operators for short-term stay options. These home-sharing and short-term rental services allow individuals to rent either their entire home or rooms within their home to guests on a short-term basis. Although this segment of the market is still small relative to the overall hospitality market, it is growing rapidly and appears positioned to reduce the demand for standard hotel services in many locations over the long term. In the Chicago Metropolitan Area, there are approximately 7,500 active short-term rentals and over 121,700 total hotel rooms, indicating that this segment is not yet fully disrupting the industry, but remains a trend to watch for several reasons.

Additional themes impacting the hotel market center around localization and the integration of technology. Hotels which offer a compelling local experience rather than a generic stay are increasing in popularity. Large hotel flags such as Hyatt are responding to this trend by introducing locally-owned and operated models, such as Hyatt Centric. Regarding technology, features such as mobile check-in, touch ID room keys and remote reservation management are gaining momentum in the industry and shaping the expectations of travelers such that future hotels will have little choice but to adapt to these requirements.

## LAKE COOK CORRIDOR HOTEL OUTLOOK

The hotel within in the Lake Cook Corridor is performing adequately. It serves the needs of the adjacent community and provides an attractive and affordable option, but is not a visible destination hotel for guests outside of Buffalo Grove.

In order for the Lake Cook Corridor's hotel offerings to remain competitive in the future, enhancement to the Corridor should be explored. It is important to enhance the general environment of the Corridor, which includes providing a more robust walkable experience with retail and restaurant options. Creating walkable, lively retail and business districts can lead to increased demand from business and personal travelers alike.

Although the current market dynamics suggest that additional net hotel development may not be supported today, a revitalized Corridor that offers destination retail, enhanced amenities, walkability and connections to road and mass transit networks could lead to market conditions that would support new or redeveloped hotel space in the future.

## KEY FINDINGS:

- The Lake Cook Corridor currently has one hotel with 152 hotel rooms. The Corridor represents 55 percent of the hotel rooms in Buffalo Grove but only 5 percent of the rooms in the immediate suburban vicinity.
- The hotel sector in the Lake Cook Corridor is performing adequately with an average occupancy rate of 64 percent. This is in line with the occupancy rate of the immediate surroundings and the Chicago Metropolitan Area.
- The Lake Cook Corridor's hotel performance is driven by the adjacent office properties and local resident demand, but is limited in growth potential by a lack of direct accessibility to the highway and mass transit networks and lack of nearby entertainment venues and amenities.
- The Lake Cook Corridor and the hotel market generally are facing a series of trends including: growing demand for customized experiences, increased amenities and technology. Any future hotel development or renovation in the Corridor must consider these factors.
- Although additional net hotel space may not be supported today given the current market dynamics, a Corridor with destination retail, enhanced amenities, walkability and connections to road and mass transit networks could create market conditions to support limited new hotel development in the future.

# HEALTHCARE OVERVIEW

## LAKE COOK CORRIDOR HEALTHCARE SNAPSHOT

Per JLL Research and CoStar data, there are eight buildings serving medical office and healthcare tenants in the Lake Cook Corridor. These buildings comprise 183,392 square feet of total space. The medical office space in the Corridor is located in traditional low-rise office buildings that have been converted to medical use. Three of the eight buildings are owned by Hamilton Partners and each enjoy a diverse tenant mix of doctors, medical office users and clinics. Two immediate care centers (Northshore Immediate Care Center and Northwest Community Healthcare (NCH) Immediate Care Center) are located within the Corridor and provide a wide range of non-emergency care services for those in the area. Outside of the Corridor, along Busch Parkway near Milwaukee Avenue is Northwest Community Healthcare, which offers internal medicine and family practice health services.

The tenant base within the Lake Cook Corridor is primarily comprised of individual local practitioners and small medical clinics. NCH Immediate Care Center has helped attract this small, but significant cluster of medical users. Buffalo Grove Business Park is home to the majority of the small and mid-sized doctors and clinics that range between 250 square feet and 13,500 square feet.

## MARKET INDICATORS AND PERFORMANCE

The medical office space in the Lake Cook Corridor has a vacancy rate of 14.6 percent, which is lower than Buffalo Grove's overall medical office vacancy rate of 18.9 percent and only slightly higher than Chicago's suburban medical office vacancy rate (12.6 percent).

Net medical office absorption in the Corridor was flat in 2016, as seemingly no new tenants moved in or out during the year. This lack of absorption is not uncommon in the Corridor, as with such a small supply, moves are less common than in the office or retail asset types. Since 2008, medical office and healthcare absorption in the Corridor has only varied by a maximum of 17,561 square feet in one year (2012), and the Corridor has seen a total positive net absorption of 48,568 square feet over a nine year span.

In general, Buffalo Grove and the Lake Cook Corridor offer medical office rental rates that are slightly more affordable than the surrounding area. This is reflective of an elevated level of Class B inventory, and this is potentially a competitive advantage for the submarket.

From a medical office standpoint, the Corridor could have potential to be a more robust health care service center. As shown in Map 7.0, Buffalo Grove appears to be on the edge of several hospital service areas. Consequently, creating a primary or secondary medical hub to serve Buffalo Grove and the surrounding areas should be further explored. Such development could help spur additional medical retail tenants and services.

TABLE 7.0 MEDICAL OFFICE/HEALTHCARE MARKET STATISTICS (2016)				
	Lake-Cook Corridor	Buffalo Grove	Chicago Suburban	United States Suburban
TOTAL INVENTORY, IN SQUARE FEET	183,392	523,554	46,406,881	3,660,673,022
VACANCY RATE	14.60%	18.90%	12.60%	7.50%
AVERAGE GROSS RENT (\$ PER SQUARE FOOT, PER YEAR)	\$19.92	\$20.38	\$22.21	\$21.34
2016 ABSORPTION, AS A % OF INVENTORY	0.00%	1.52%	0.49%	0.60%

Source: JLL Research and CoStar.



## HEALTHCARE MARKET TRENDS

The healthcare and medical office sectors are currently facing a series of emerging trends, all of which impact the medical space within the Lake Cook Corridor.

One key trend is the concentration of medical office locations around hospitals. Medical office developments increasingly tend to cluster in a pattern similar to retailers, in which a large anchor tenant behaves as a catalyst for smaller medical office and healthcare users. When a large user is established in a certain location, smaller users will occupy the surrounding area and create a network that supports a full spectrum of medical needs.

A second trend in medical office buildings is the prioritization of urban infill centers over new development, with easy access to patients and consumers. Also, many large healthcare providers are now targeting malls and shopping centers for new locations, as the adjacent retail provides foot traffic, parking and accessibility. Smaller healthcare providers are following suit as they relocate to strip malls and single-story retail settings. The Buffalo Grove Town Center within the Lake Cook Corridor could be a reasonable location for meeting the demand of this trend, and this could serve the dual purpose of reducing the retail vacancy in the Corridor, while meeting the needs of the aging adjacent community.

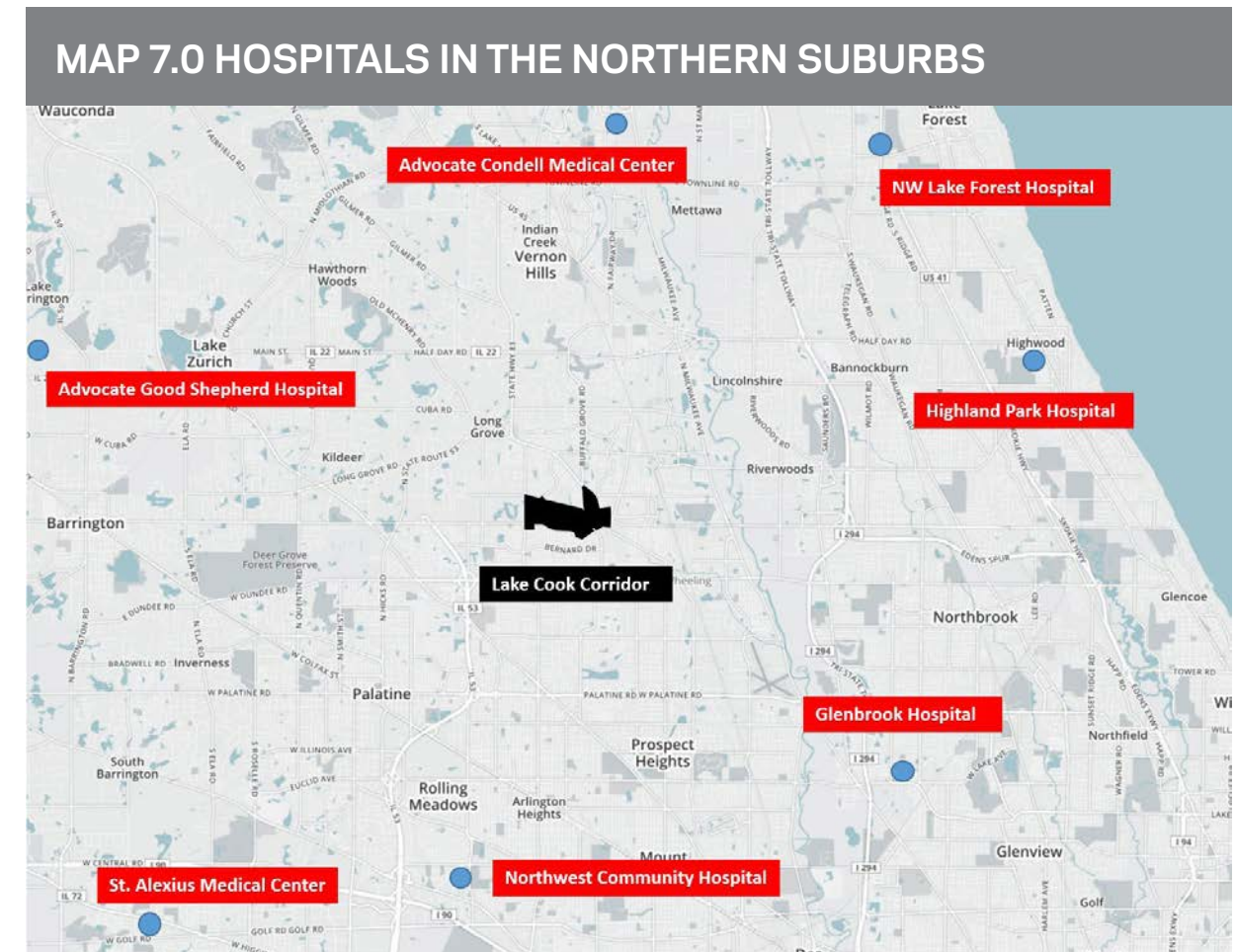
A final trend of note is large volume of mergers and acquisitions in the healthcare industry. Of relevance to the Chicagoland healthcare market is the merger of Advocate Health Care and North Shore University Health System. These two entities intended to merge in 2014 which would create a 16 hospital system that would stretch across Illinois and control more than half of the suburban hospital market. Such mega-mergers further underscore the difficulty for independent clinician groups and hospitals to compete on their own.

## LAKE COOK CORRIDOR HEALTHCARE OUTLOOK

As described above, the medical office and healthcare space relies on strong demand from the surrounding community. In order for there to be a significant increase in the local medical office market, a large-scale medical provider may be required in the vicinity. In looking at the surrounding hospitals' service areas, it does appear that there is potential for a more robust health care service center in Buffalo Grove and specifically in the Corridor.

### KEY FINDINGS:

- The Lake Cook Corridor has approximately 183,400 square feet of medical office and healthcare space, which represents just over half of medical space in the Village. The majority of the Corridor's healthcare stock is Class B product.



- The medical office space in the Lake Cook Corridor has vacancy rate of 14.6 percent, though net absorption in the Corridor was unaffected in 2016. The average rental rates are approximately \$20 per square foot.
- From a medical office standpoint, the Corridor could have the potential to be a more robust health care service center. Buffalo Grove appears to be on the edge of several hospital service areas. Consequently, creating a primary or secondary medical hub to serve Buffalo Grove and the surrounding areas should be further explored.

# MISCELLANEOUS/ SPECIALTY USES

## GOLF INDUSTRY REPORT

The National Golf Foundation (NGF) and Golf Course Industry magazine compile statistics on the golf industry and provide insight into golf-related trends, participation levels and financial benchmarking for courses. In their 2016 report, NGF cites over 14,000 open and operating 18-hole equivalent golf courses in the United States. That number has declined roughly five percent since it peaked in 2006; however, the U.S. still statistically houses about 45 percent of the world’s courses. NGF claims the reason for the decline is “a natural economic response to overbuilding,” as the supply of golf courses grew roughly 40 percent in the 20 years prior to 2006. It should be noted that NGF reports that there has been an uptick in beginning golfers and overall interest in the game has increased among non-golfers.

## REGIONAL PERSPECTIVE

The number of public courses open in the U.S. is approximately 11,000, and it may come as no surprise that they are, on average, less profitable than private courses. According to Golf Course Industry, 32 percent of U.S. public courses operated at a loss in 2014. In Chicagoland specifically, a 2016 *Daily Herald* article cited 22 of 36 mostly municipal public courses (61 percent) were operating at a loss. In the same study, Buffalo Grove’s course ranked in the middle of the pack at No. 18.

According to NGF, there were 17 new golf course openings in 2015 as compared to 177 closures in the same year. NGF also tracked roughly two-thirds of the 177 U.S. golf courses that closed permanently in 2015 and cited them as having low-priced greens fees of \$40 or less. Additionally, they forecasted this trend would continue as many public agencies are finding ways to reduce expenses.

## BUFFALO GROVE GOLF COURSE PERFORMANCE

According to the 2015 Village Financial Report, the Buffalo Grove Golf Club (BGGC) operated at a \$237,606.00 loss, inclusive of expenses associated with the Village’s internal service charges (IT expenses, building maintenance/utilities and fleet). The following table shows the 10-year performance of the Buffalo Grove Golf Club.

Based on current performance, BGGC will need to increase round play by 2 percent per year, over inflation, in each of 10 years to break even.

Buffalo Grove Golf Club 10-Year Performance									
Year	Rounds Played	Greens Fees & Memberships	Merchandise	Rentals	Range Fees	Miscellaneous	Total Operating Revenue	Operating Expenses	Operaing Income/(loss)
2006	N/A	\$ 846,895	\$ 73,863	\$ 206,226	\$ 64,748	\$ 29,071	\$ 1,220,803	\$ (1,177,647)	\$ 43,156
2007	48,328	\$ 850,077	\$ 81,741	\$ 202,477	\$ 61,544	\$ 26,830	\$ 1,222,669	\$ (1,145,195)	\$ 77,474
2008	46,465	\$ 847,268	\$ 82,907	\$ 251,370	\$ 59,622	\$ 14,308	\$ 1,255,475	\$ (1,388,905)	\$ (133,430)
2009	48,106	\$ 855,959	\$ 73,506	\$ 217,764	\$ 70,439	\$ 15,868	\$ 1,233,536	\$ (1,312,197)	\$ (78,661)
2010	46,816	\$ 798,625	\$ 74,931	\$ 215,667	\$ 64,948	\$ 6,373	\$ 1,160,544	\$ (1,287,450)	\$ (126,906)
2011	42,106	\$ 732,595	\$ 71,536	\$ 205,769	\$ 51,393	\$ 17,219	\$ 1,078,512	\$ (1,260,110)	\$ (181,598)
2012	42,802	\$ 758,884	\$ 77,185	\$ 209,328	\$ 51,409	\$ 26,790	\$ 1,123,596	\$ (1,157,198)	\$ (33,602)
2013	37,877	\$ 705,447	\$ 65,006	\$ 201,010	\$ 57,012	\$ 44,024	\$ 1,072,499	\$ (1,161,555)	\$ (89,056)
2014	36,877	\$ 693,435	\$ 68,496	\$ 230,406	\$ 61,338	\$ 21,972	\$ 1,075,647	\$ (1,139,129)	\$ (63,482)
2015	37,727	\$ 723,398	\$ 70,320	\$ 222,306	\$ 62,116	\$ 19,698	\$ 1,097,838	\$ (1,335,440)	\$ (237,606)
Totals							\$ 11,541,119.00	\$ (12,364,830.00)	\$ (823,711.00)

TABLE 8.0 REGIONAL GOLF COURSE NET INCOME, 2015			
CITY	Revenue	Expenses	Net Income
BUFFALO GROVE GOLF COURSE	\$ 1,097,838	\$ 1,335,440 **	\$ (237,606)
BUFFALO GROVE ARBORETUM	\$ 1,238,090	\$ 1,431,998 **	\$ (193,908)
ARLINGTON LAKES GOLF CLUB	\$ 1,329,106	\$ 1,371,150	\$ (42,044)
PALATINE HILLS GOLF COURSE	\$ 1,186,332	\$ 1,333,574	\$ (147,242)
CHEVY CHASE COUNTRY CLUB (WHEELING)*	\$ 4,123,565	\$ 4,433,188	\$ (309,623)

\*Wheeling expenses include depreciation and amortization  
\*\* Both BGGC and Arboretum expenses include internal service fund transfers and funding for capital expenses.  
Source: 2015 Comprehensive Financial Report: Buffalo Grove, Arlington Heights, Palatine, Wheeling



## PUBLIC LIBRARY REPORT

During the onset of the digital era, many speculated libraries would be among the early casualties of technological growth. Since then, JLL Research has learned people still largely approve of libraries, with 66 percent of U.S. adults above the age of 16 claiming that closing their local public library would have a major impact on their community. Instead of being ousted by technology, libraries have been some of the earliest adopters of digital tools and information and, as a result, become an access point to information within their communities. Libraries act as centers of learning, with nearly all public libraries (98 percent) offering training in technology and digital tools, such as computers and smart devices. Furthermore, some libraries look to become centers of future innovation by equipping facilities with next-gen tech (3D printers, VR experiences, etc.) and training members of the community in their use. They are also becoming “Makerspaces” by providing services to allow users to explore, play, create and collaborate.

As with many industries, the digital era has presented libraries with difficult questions concerning identity; however, as more people turn to digital texts, libraries find most people still prefer the physical object—at least some of the time. As a result, trends are springing up that serve multiple types of libraries based on the needs of the community. At one extreme, some new libraries do not carry any printed text, instead opting for digital media and interlibrary book transfers to supply their patrons with the information they desire. At the opposite end of the spectrum, Eden Prairie,

Minnesota and McAllen, Texas have chosen to become local print warehouses, repurposing vacant, undesired sites to house massive amounts of printed text in addition to computer labs and public meeting spaces.

## INDIAN TRAILS LIBRARY DISTRICT

The Indian Trails Library District serves the Lake Cook Corridor area, however the library facility is located several miles away in the Village of Wheeling. Indian Trails is currently undergoing an extension renovation plan in excess of \$14M to enhance the library experience by incorporating many of the new trends noted above including “Makerspaces”. While under renovation, the library and its services were relocated to a temporary site along Dundee Road in the Village of Buffalo Grove. When speaking to library officials, they noted that the temporary Buffalo Grove location was well received and many Buffalo Grove residents expressed a desire for a satellite facility in Buffalo Grove. Moving forward, the Village should continue to work with Indian Trails to possibly identify potential locations for future expansion opportunities.

## KEY FINDINGS:

- In their 2016 report, NGF cites over 14,000 open and operating 18-hole equivalent golf courses in the United States. That number has declined roughly five percent since it peaked in 2006.
- According to NGF, there were 17 new golf course openings in 2015 as compared to 177 closures in the same year. NGF also tracked the 177 courses that closed and found that roughly two-thirds of them had low-priced greens fees of \$40 or less.
- As with many industries, the digital era has presented libraries with difficult questions concerning identity; however, as more people turn to digital texts, libraries find most people still prefer the physical object—at least some of the time. As a result, trends are springing up that serve multiple types of libraries based on the needs of the community.
- The Village should continue to work with Indian Trails to possibly identify potential locations for future expansion opportunities.





PART 2 | EXISTING CONDITIONS

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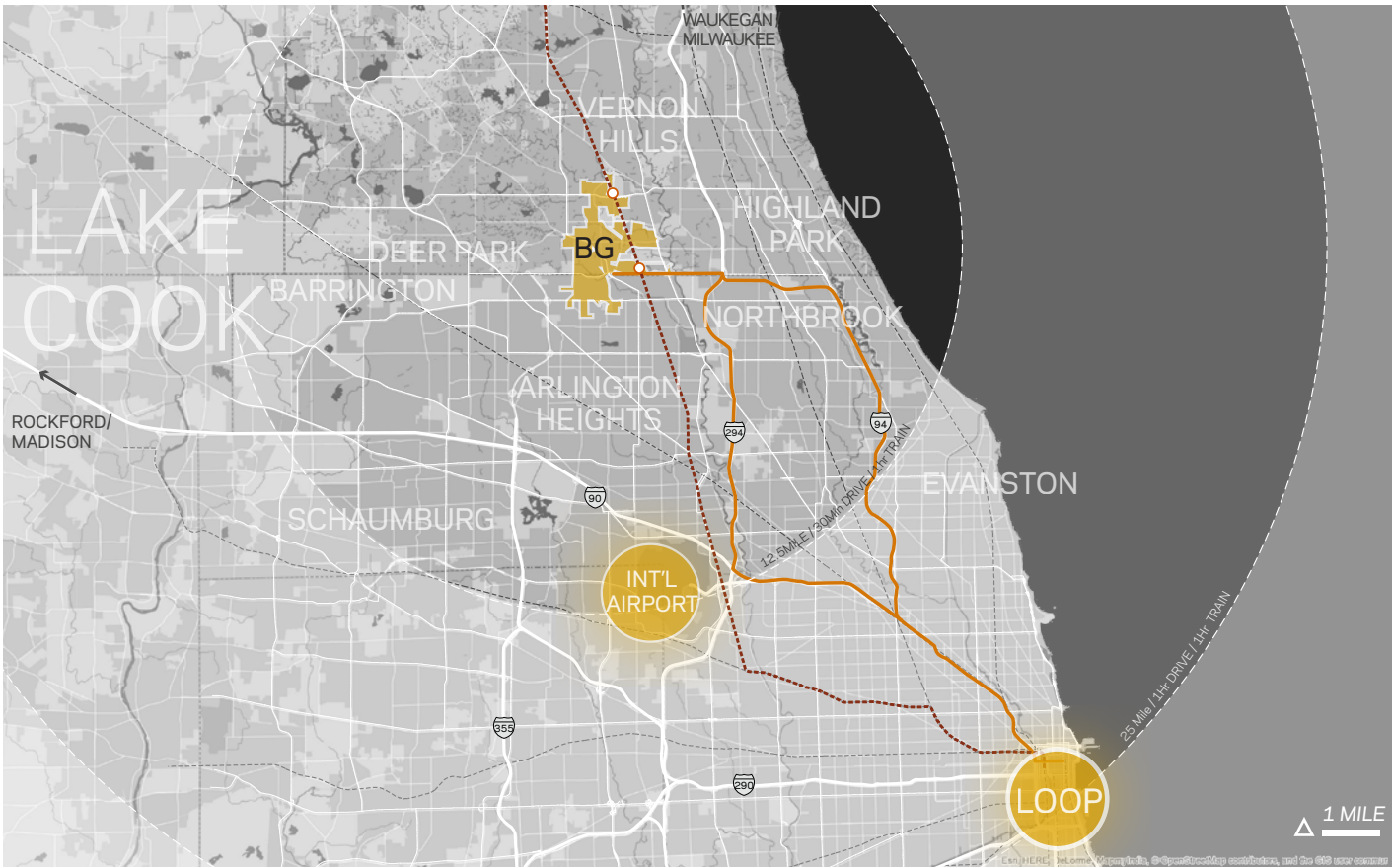
# SITE CONTEXT

## REGIONAL POSITION

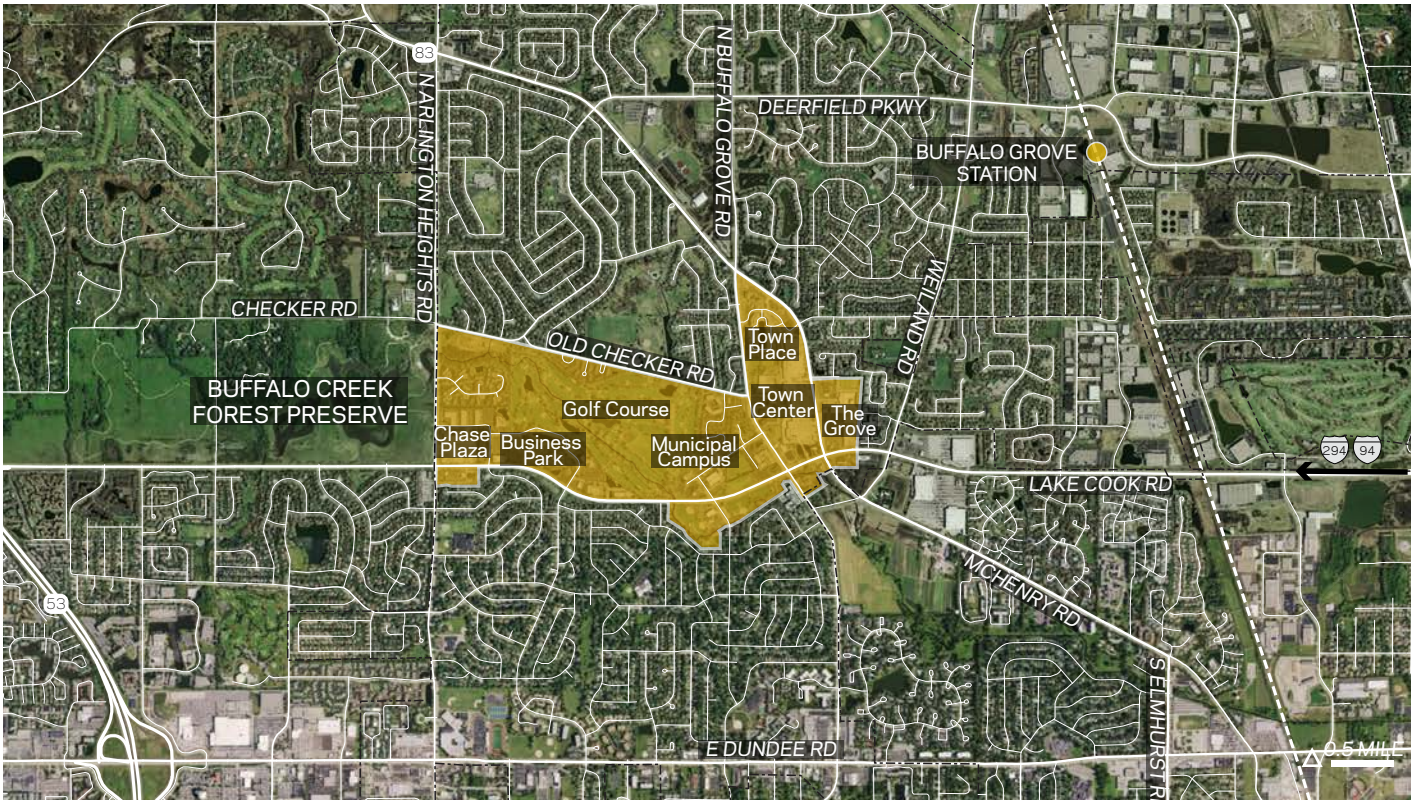
The Village of Buffalo Grove is a suburban community in the Metropolitan Chicago area. The village is approximately 35 miles northwest of downtown Chicago and approximately 20 miles north of O'Hare International Airport. Located along Lake-Cook Road, the Village has strategic access to the main Interstate Highway system (I-90, I-94, and I-294) in the region and is a major thoroughfare for the surrounding communities.

Lake-Cook Road generally follows the boundary of 2 major counties of Chicago, that of Lake County to the north and Cook County to the south. The road essentially divides the Village between these two county jurisdictions.

Buffalo Grove is along the Metra (commuter) rail line's North Central Service (NCS) corridor which connects Chicago Union Station and Antioch. The Village can be accessed by two train stations, Buffalo Grove and Prairie View station, located along the eastern boundary of the Village.



Regional Context



Corridor Context



## STUDY AREA CONTEXT

The study area is located at the center of mass of The Village of Buffalo Grove and is encompassed by Arlington Heights Road, Old Checker Road, N. Buffalo Grove Road, McHenry Road, and Lake Cook Road.

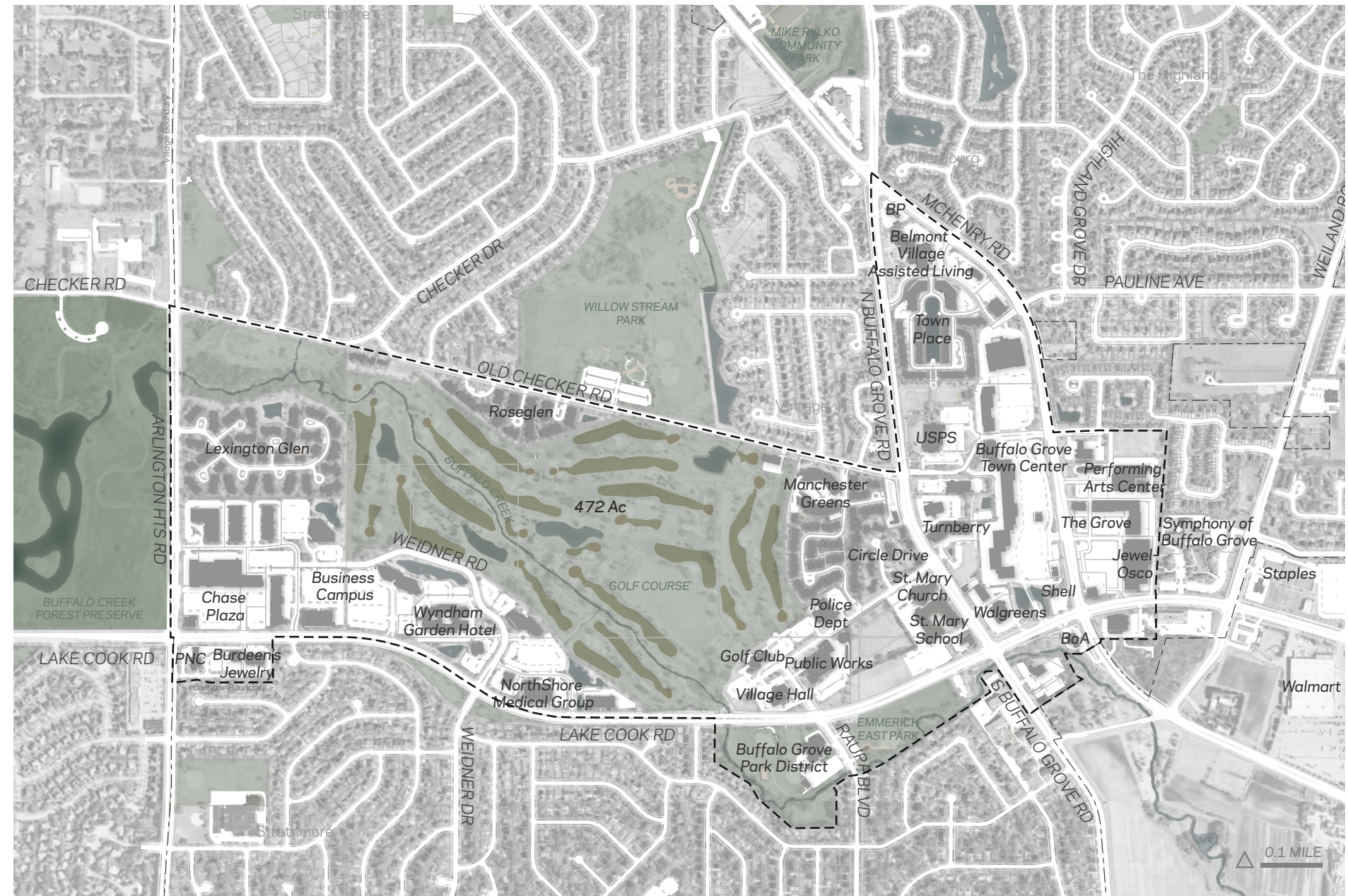
The study area is bordered by residential neighborhoods to the North, South, and East. Along the western border is the Buffalo Creek Forest Preserve that serves as a connection to the wider stream network throughout the area.

At approximately 472 acres the study area is comprised of Town Center, Buffalo Grove Golf Club, the Village Municipal campus, Business Park, Chase Plaza, the Grove, and residential neighborhoods. The area is a mix of single-family and multi-family residential, municipal institutions, educational uses, hotels, shopping centers, offices, cultural assets, and municipal open spaces.

There are 4 major single-family attached developments within the study area, which is 37.7 acres in total with about 350 housing units. Single-family detached makes up a smaller portion at 72 units and 15.7 acres in total. The number of multifamily homes in Town place, Manchester Greens, and Turnberry's developments is 267 units in total. Among these the highest density is Town Place at 27.9 units/acre. At the north end of the study area, Belmont Village Assisted Living for seniors has 158 units, with a density of 35.11

units/acre. Buffalo Grove Town Center, Chase Plaza and The Grove occupy 25.1 acres, 9.2 acres and 9.7 acres accordingly, which are the 3 major retail developments in the area.

The 45.5-acre Buffalo Grove Business Park, at intersection of Arlington Heights Road and Lake Cook Road, is managed by Hamilton Partners Inc.



Corridor Existing Condition



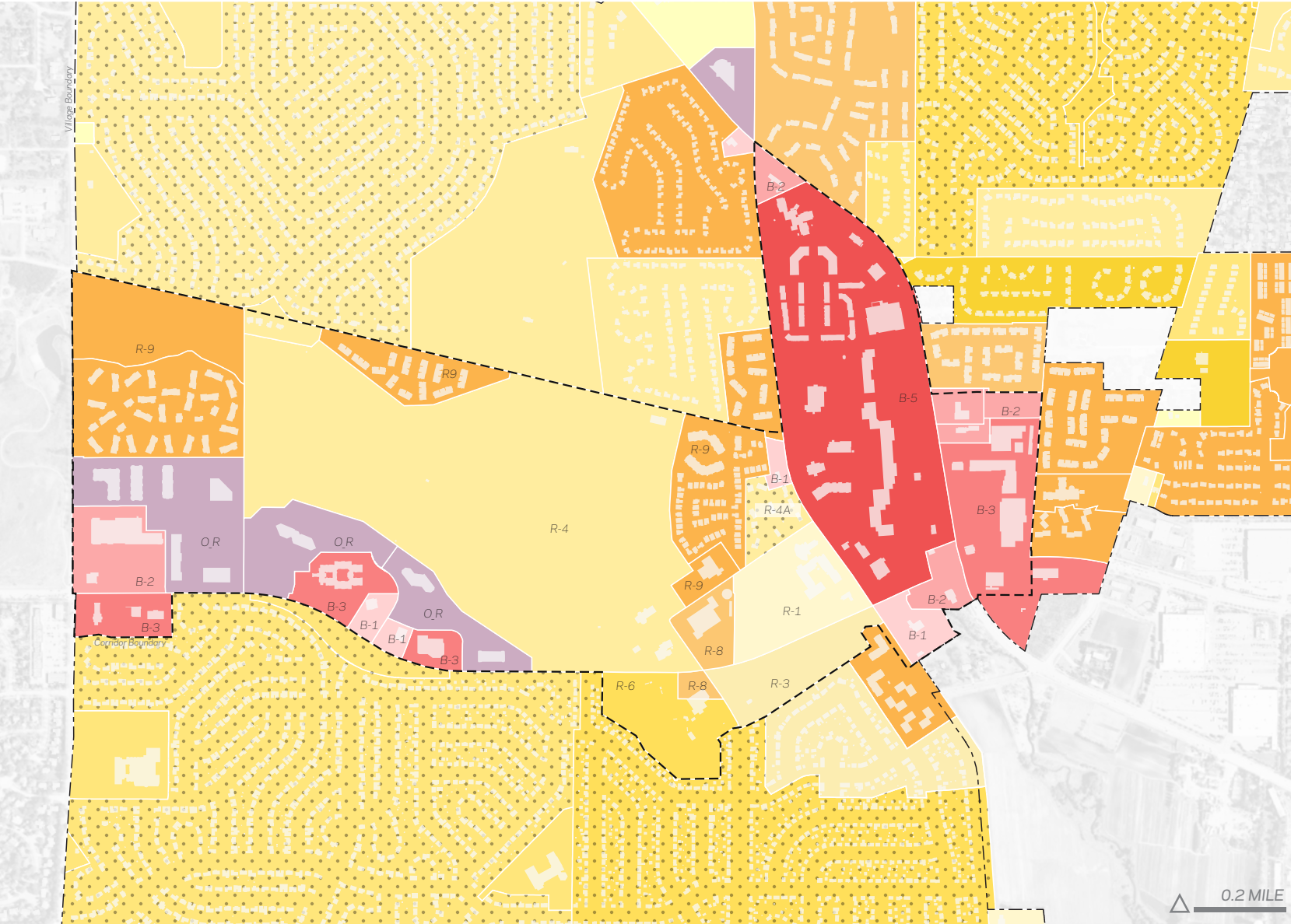
# ZONING AND LAND USE

# ZONING

While there are numerous land uses indicated on the existing zoning map, the current conditions generally break down into three primary usage categories: Residential, Business, and Office and Research Districts. The largest single zoning areas are occupied by the municipal golf course zoned as R-4, and Town Center Business District as B-5. The majority of the remaining study area is made up of individual B-1, B-2, B-3, R-1, R-3, R-6, R -8, R-9 and OR zones.




















## LAND USE

The land use pattern in the Village is typical of other Chicagoland suburban neighborhoods. The central area consists of commercial activities with surrounding residential and office uses. The study area is one of the most diverse mix of land use areas in the Village. Land use in the district generally follows the zoning classification with the exception of the open spaces being zoned as residential. The largest land use area is the Buffalo Grove Golf Course at 122 acres, followed by retail, entertainment and hotel use. The remaining use is divided amongst residential, office, institutional and open space.

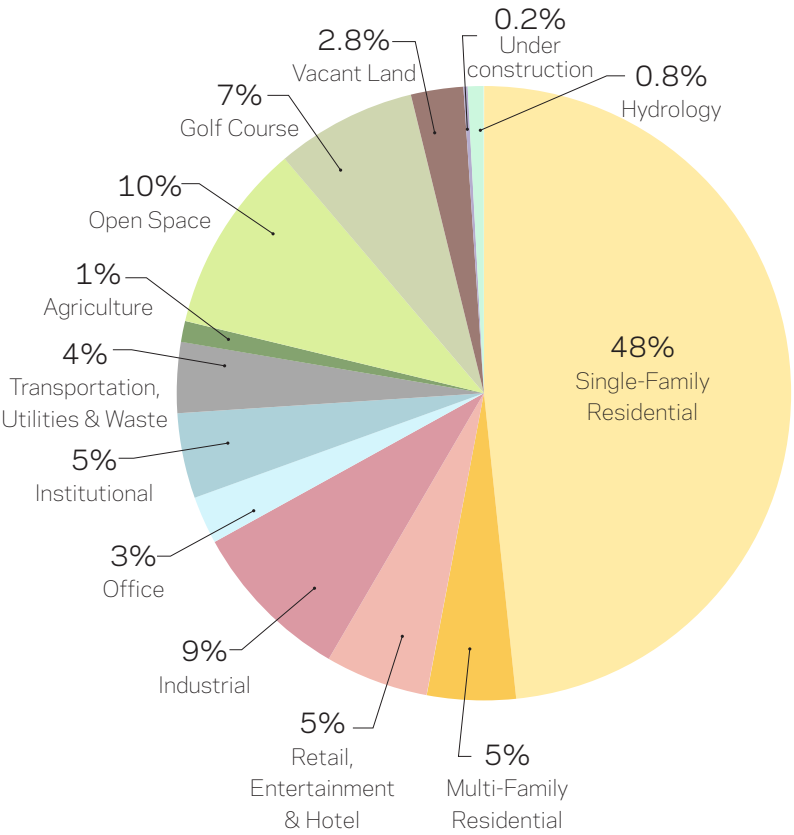


# Zoning Map

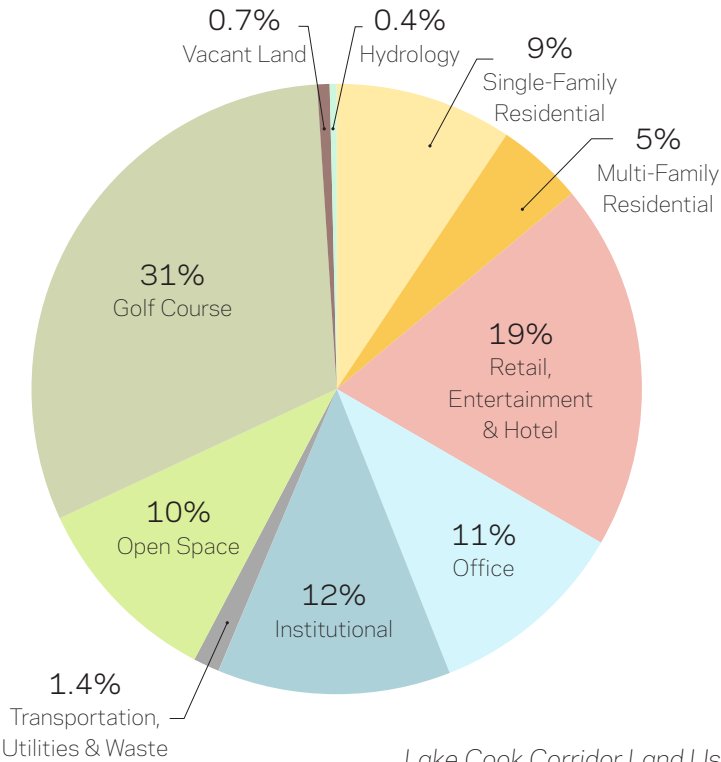
## ZONING LEGEND

 R-1 One Family Dwelling District	 B-1 Business District, Limited Retail
 R-2 One Family Dwelling District	 B-2 Business District, General Retail
 R-3 One Family Dwelling District	 B-3 Planned Business Center District
 R-4 One Family Dwelling District	 B-4 Business Service & Wholesale District
 R-5 One Family Dwelling District	 B-5 Town Center Business District
 R-6 One Family Dwelling District	 I Industrial District
 R-7 One and Two Family Dwelling District	 O_R Office and Research District
 R-8 Multiple Family Dwelling District	 Lake Cook Corridor
 R-9 Multiple Family Dwelling District	 Village Boundary
 R-E One Family Dwelling DistrictB	

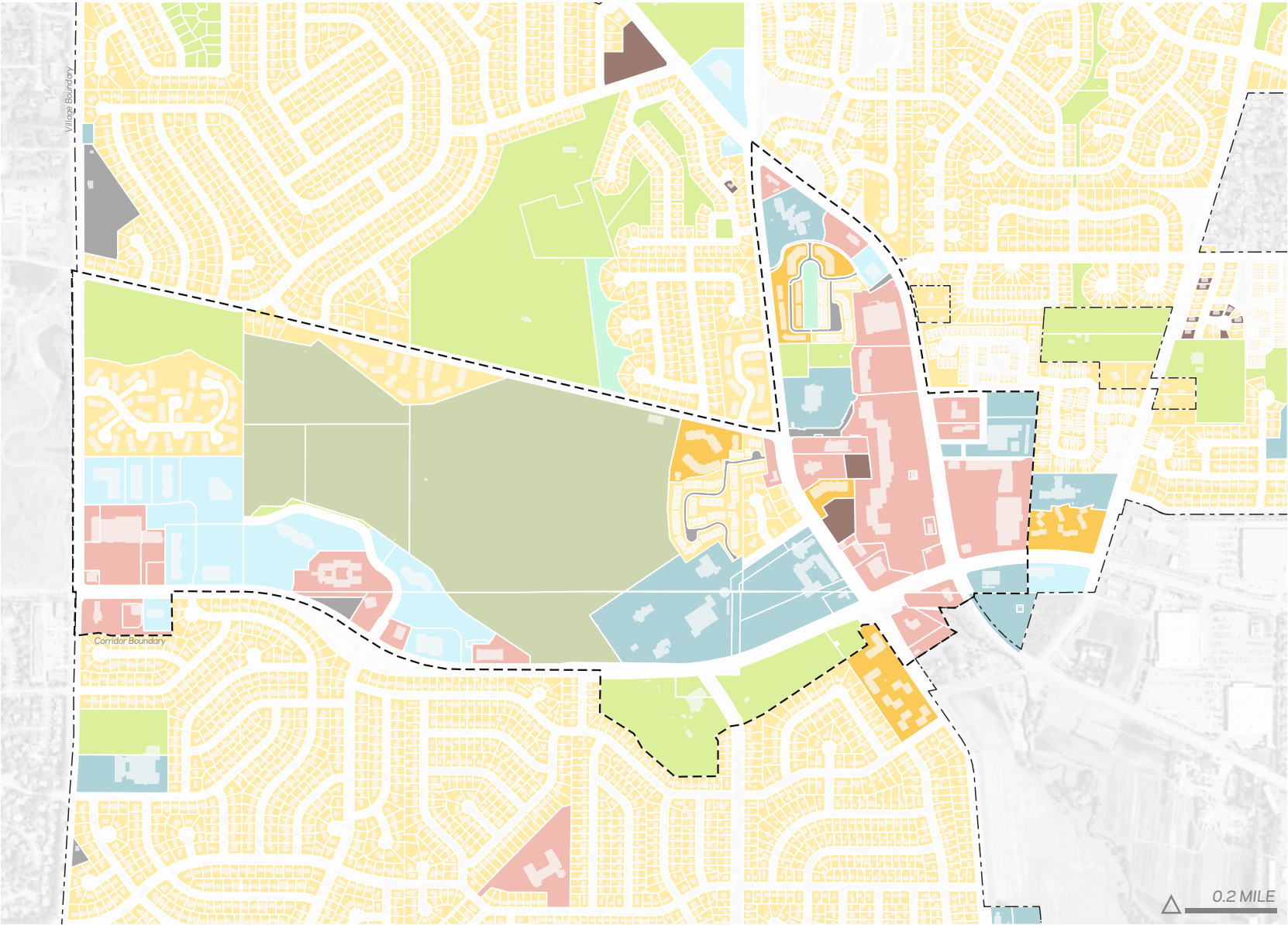




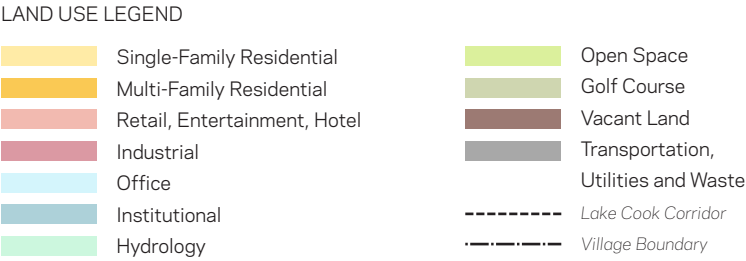
Village Land Use Percentage



Lake Cook Corridor Land Use Percentage



Land Use Map





# ENVIRONMENTAL FEATURES

## PARKS AND OPEN SPACES

The Village of Buffalo Grove is a suburb veined with streams, creeks and other water features. With an extensive collection of parks and natural open spaces as part of a large network of natural and man-made open space corridors these spaces serve as both centers of recreation and natural enjoyment as well as strategic flood control elements. Many of the open spaces and parks are contiguous but lack connectivity.

As the largest single land area within the study area, the Buffalo Grove Golf Course is one of the largest open spaces within the Village. Utilized as a floodplain, the course serves the dual function of municipal amenity and civil infrastructure.

The largest of such areas adjacent to the study area is the Buffalo Creek Forest Preserve which borders the western edge of the study area and includes the Buffalo Creek Nature Preserve. The water system and reservoir of the Forest Preserve is connected to the study area downstream of the dam at the intersection of Old Checker Road and Arlington Heights Road.

Nicole Park to the north of Old Checker Road along Arlington Heights Road contains a playground along

with a large multi-purpose open space.

Willow Stream Park, to the north of the study area along Old Checker Road, serves the Village as an important open space for daily and recreational use. It is home to baseball fields, tennis and basketball courts, swimming pool, a children’s playground, soccer fields, large open grass areas and accessory parking.

North of Willow Stream Park, through trail connections across McHenry Rd, is the Mike Rylko Community Park and Buffalo Grove Fitness Center. The park expands the recreational capacity of the Village by the addition of sports fields, the fitness center, golf and sports center, as well as serving as a venue for farmers markets and municipal fairs.

South of Lake Cook Road, at the intersection with Raupp Blvd is Emmerich Park which is home to the Buffalo Grove Park District and serves the community through additional sports fields and multi-purpose open space. The Lake Cook Road widening plan will have a future impact on this park and its facilities.

To the West of Emmerich Park is Wiedner Park which continues the network of open space and serves as additional lawn and garden areas.



Buffalo Grove Golf Club



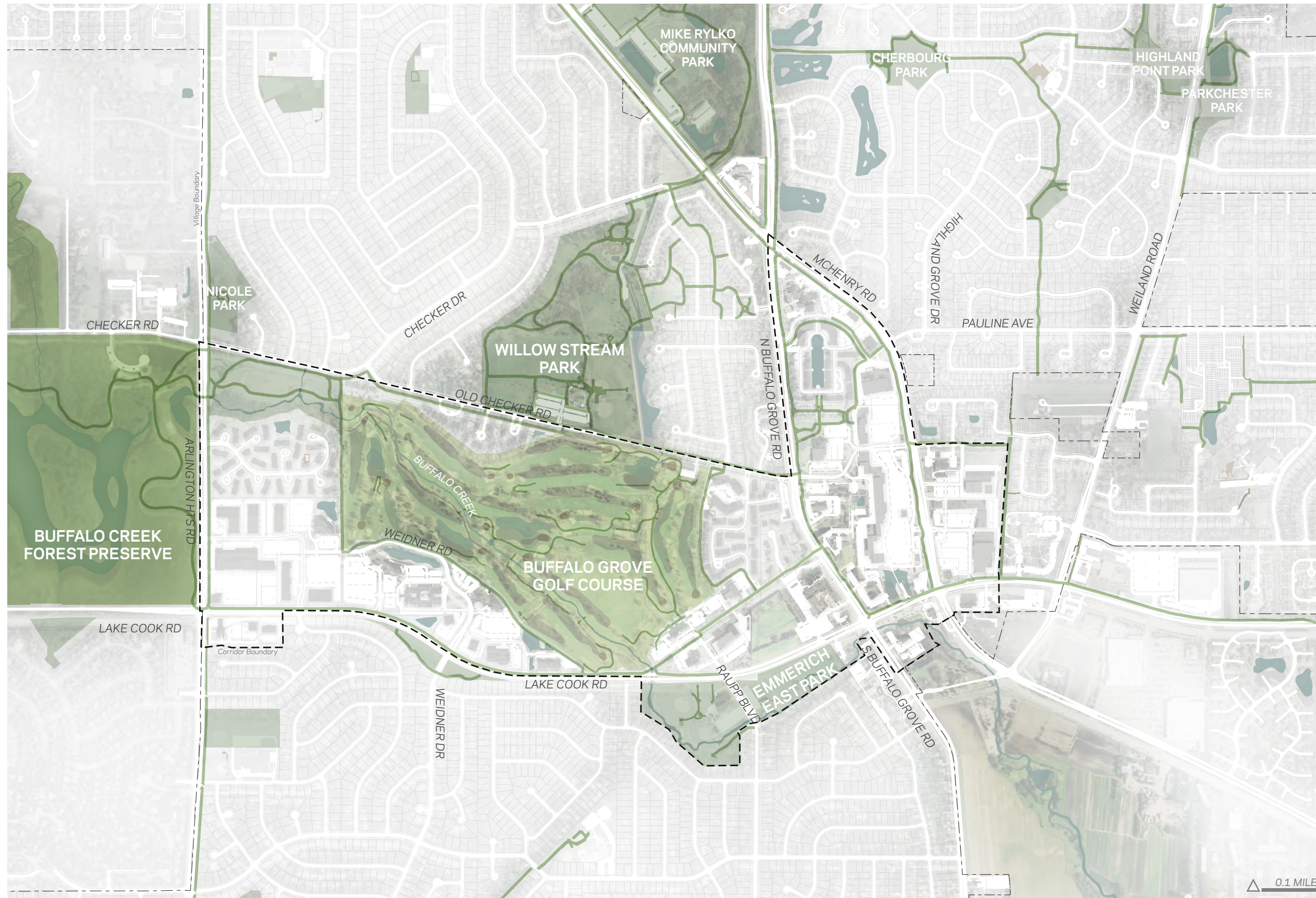
Source: Bob Collébert

Buffalo Creek Forest Preserve



Willow Stream Park





- OPEN SPACE LEGEND**
- Trails
  - Water features
  - Golf Course
  - Parks
  - Forest Preserve

Open Space and Trails Map



HYDROLOGY

The major watercourse through the study area is Buffalo Creek, which traverses the area from northwest to southeast. Buffalo Creek runs 11.2 miles long as a tributary of the Des Plaines River from west to east.

According to the FEMA Flood Insurance Study (FIS), the creek has approximately 18.4 square miles at Lake Cook Road, which is downstream of the confluence with Farrington Ditch. The creek drains through the area in an open channel. The study area consists of both regulatory floodplain and floodway associated with the creek. The creek then flows south through a bridge under Lake Cook Road. The residential properties located along the south side of the creek, south of Lake Cook Road, have experienced flooding. The structures on the properties are located above the flood plain.

The total area for the 100-year floodplain is 120 acres, which is 26.8% of the total study area. In the Buffalo Grove Golf course, 100-year floodplain represents the 89 acres which occupies 71.8% of the entire golf course, while the 500-year floodplain is 15.6 acres, or 12.6% of the golf course site.

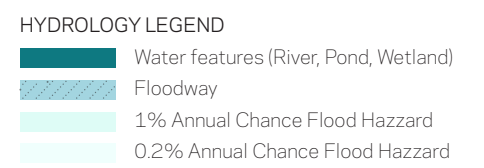
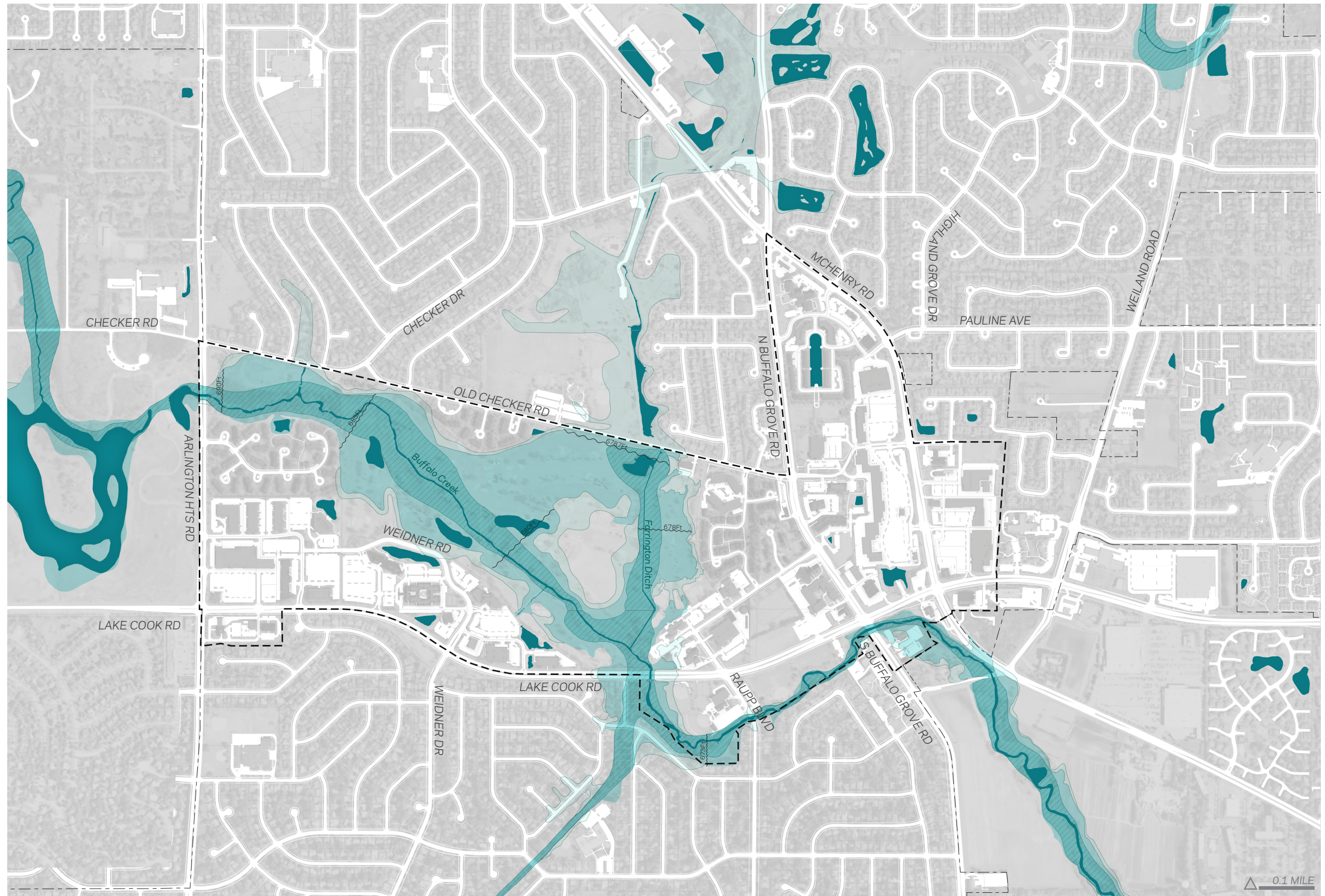
The secondary watercourse traversing through the area is Farrington Ditch. According to the FIS,

Farrington Ditch has 0.6 square miles of drainage area at Old Checker Road and has approximately 0.8 square miles of drainage area at the confluence with Buffalo Creek. The ditch enters the area from the north under Old Checker Road and continues in a southwardly direction through a pond and a series of closed conduits before its confluence with the Buffalo Creek.



Source: FEMA, CBB Engineering





Hydrology Map



# TRANSPORTATION & TRANSIT

Lake Cook Road is a major gateway into the Village of Buffalo Grove as it connects the Village with the regional highway system to the east (Tri-State Tollway) and west (IL 53). The convergence of Lake Cook Road with three of the Village’s other major streets, Buffalo Grove Road, McHenry Road, and Arlington Heights Road forms the commercial core of the community. More than 70,000 vehicles pass through this central commercial area each day. An ideal transportation system in a suburban commercial core area is a comprehensive and multimodal network of facilities that provide convenient access to goods and services, efficient vehicular circulation, safe mobility for pedestrians and bicyclists, and adequate parking for patrons and employees.

This section provides an assessment of the existing transportation system in the Lake Cook Corridor and identifies issues to be addressed. Moving forward in the planning process, this assessment will inform the transportation strategies and recommendations of the Lake Cook Corridor Plan.

The information for this section was obtained from various sources, including the Village of Buffalo Grove, Cook County Department of Transportation and Highways (CCDOTH), Lake County Division

of Transportation (LCDOT), Illinois Department of Transportation (IDOT), Metra, Pace, visual assessments, and field reviews.

## A. STREETS Functional Classification and Jurisdiction

Streets are classified in a hierarchical structure by function to define their role in the transportation system and their eligibility for certain types of federal transportation funds. The street classifications present in the Lake Cook Corridor as defined by IDOT, include major streets (also known as arterials), collectors and local streets. These classifications reflect the design features of the streets, including right-of-way, street capacity, and continuity within the system, speed limit, parking controls, and traffic signal spacing. Each street classification serves as a collecting/distributing facility for the next higher classification in the system.

*1. Major Streets*  
Major Streets function as the primary travel routes through suburban areas and serve the broader region while connecting with the collectors and local streets. Major streets also carry high volumes of traffic at higher speeds, which can require design modifications in a commercial core area to calm traffic flow and ensure pedestrian safety.

The major streets in the Lake Cook Corridor are all under County or State jurisdiction, which limits the ability of the Village to unilaterally make improvements, control access or unify street character. Lake Cook Road, as well as Arlington

Heights Road and Buffalo Grove Road to the south of Lake Cook Road, are controlled and maintained by Cook County. Arlington Heights Road and Buffalo Grove Road to the north of Lake Cook Road are controlled and maintained by Lake County. McHenry Road (IL 83) is controlled and maintained by IDOT. These streets have a five-lane cross-section with two travel lanes in each direction and a center median that accommodates a left-turn lane at key intersections. The streets carry traffic volumes ranging from 11,400 to 39,600 vehicles per day.



Lake Cook Road



N Buffalo Grove Road





Arlington Heights Road



McHenry Road

2. Collector Streets

Collector streets distribute traffic between the major streets and the local streets . The collector streets in the Lake Cook Corridor are all controlled and maintained by the Village of Buffalo Grove and include Checker Road, Old Checker Road, Weidner Drive, Raupp Boulevard, and Pauline Avenue. The collectors have limited continuity, are generally two-lane streets with parking on one or both sides, and carry traffic volumes ranging from 1,650 to 3,100 vehicles per day.

3. Local Streets

Local streets provide direct access to private property and are accessed from the major streets and collectors. All remaining streets in the Lake Cook Corridor are classified as local streets and are controlled and maintained by the Village. These streets are generally two-lanes wide with parking permitted or restricted on one or both sides.

LAKE COOK CORRIDOR STREETS

Street	Classification	Jurisdiction	Truck Route	# Travel Lanes	AADT <sup>1</sup>
Lake Cook Road	Major	Cook County		4-5	37,000 - 41,100
Arlington Hts Road	Major	Cook County <sup>2</sup> Lake County <sup>3</sup>		4-5	17,800 - 23,100
Buffalo Grove Road	Major	Cook County <sup>2</sup> Lake County <sup>3</sup>		4-5	10,800 - 21,600
McHenry Road (IL 83)	Major	IDOT	Y	4-5	13,400 - 19,100
Checker Road	Collector	Village		2	1,900 - 3,100
Old Checker Road	Collector	Village		2	2,300
Pauline Avenue	Collector	Village		2	n/a
Raupp Boulevard	Collector	Village		2	1,650
Weidner Road	Collector	Village		2	n/a
All Other Streets	Local	Village		2	n/a
<sup>1</sup> AADT - Annual Average Daily Traffic volume from IDOT database (2014-2015). n/a - not available					
<sup>2</sup> Cook County jurisdiction south of Lake Cook Road.					
<sup>3</sup> Lake County jurisdiction north of Lake Cook Road.					

**Street Network Continuity and Capacity Issues**

The primary travel routes through the Lake Cook Corridor are generally on the periphery of the Corridor.

There are no continuous north-south routes through the central and western portions of the Corridor between Arlington Heights Road and Buffalo Grove Road, a distance of over one mile. This is primarily due to the presence of the Buffalo Grove Golf Course. East-west continuity is also limited by the golf course, between Weidner Road and Church Road, and by the Buffalo Grove Town Center between Buffalo Grove Road and McHenry Road.

The five-lane road capacity of Lake Cook Road is inadequate to handle the current volume of traffic in the Corridor (39,600 vpd). When combined with the short spacing between the signalized intersections at Buffalo Grove Road, McHenry Road and Weiland Road, substantial congestion occurs during the weekday peak periods, which can impede access and be a detriment to the success of the Corridor’s commercial businesses. This congestion extends west to Arlington Heights Road making it difficult to safely turn onto Lake Cook Road without the benefit of a signalized access point. These challenges are experienced daily by employees and patrons of the Buffalo Grove Business Park and Chase Shopping Plaza.

Other peak period traffic delays in the Corridor occur at the Lake Cook Road/Arlington Heights Road where the traffic signal phasing plan favors Lake Cook Road.

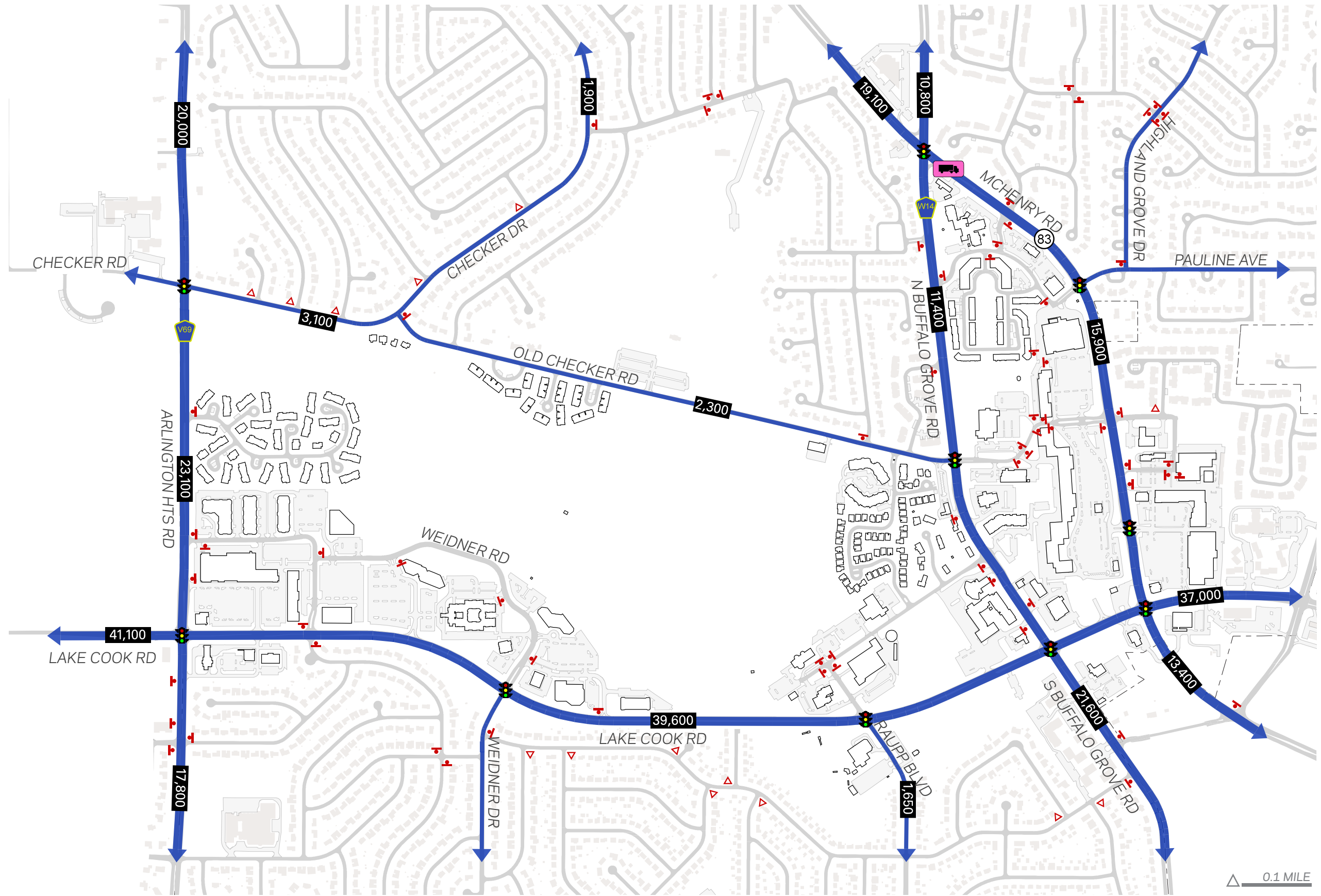
**Intersection Traffic Control**

There are 10 intersections in the Lake Cook Corridor under traffic signal control, all of which are located on the major streets and under IDOT, Cook County or Lake County control. There are also three intersections in the Corridor under all-way stop control. The remaining intersections are under two-way stop control or one-way stop or yield control.

**Truck Routes**

Truck routes are roadways that provide continuous regional travel and/or connect to private industry, and are designed to support heavy commercial traffic. McHenry Road is the only truck route in the Lake Cook Corridor. It is a posted Class II truck route that is part of IDOT’s State Truck Route System, and it carries approximately 1,075 trucks per day.





Intersection Traffic Control, Street Hierarchy and ADT

#### TRAFFIC CONTROL & STREET HIERARCHY

- Major Street
- Collector Street
- Local Street
- IL State Route
- County Highway
- Traffic Signal
- Stop Sign
- Yield Sign
- IDOT CLASS II Truck Route
- Average Daily Traffic (IDOT, 2014-2015)

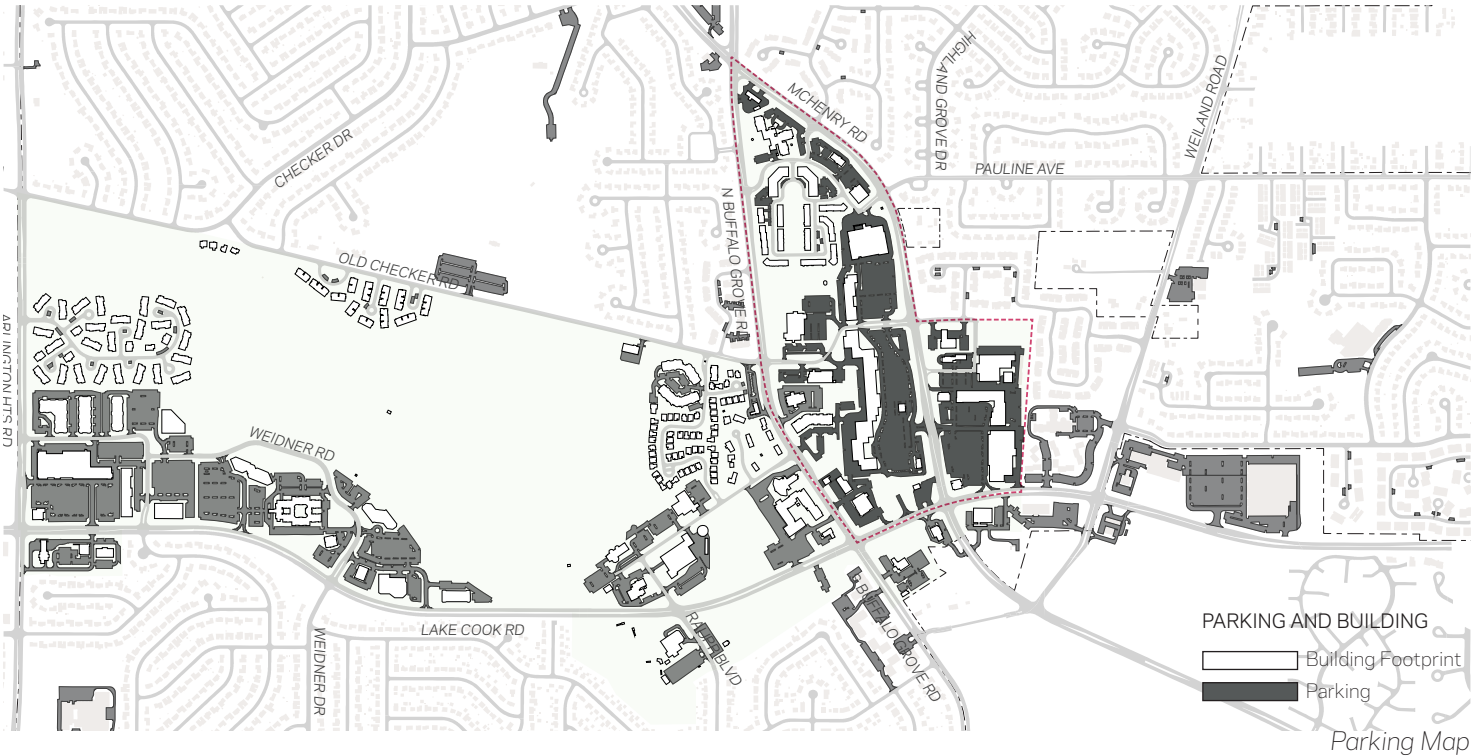
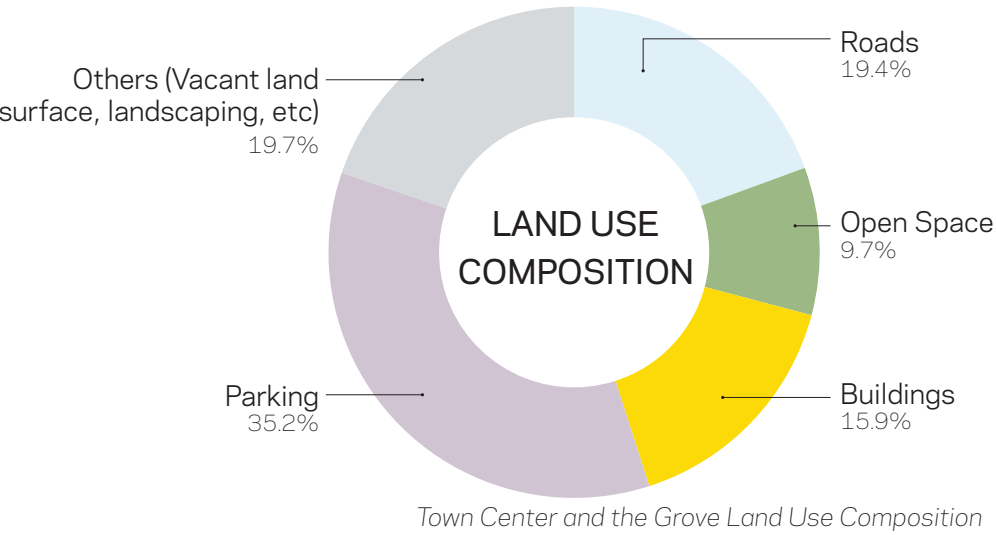
0.1 MILE

B. PARKING

The two major retail centers - Town Center and The Grove have massive surface parking. The total surface parking area occupies 36.3 acre, or 35.2% of the total 103 acre area.

However, the retail centers appear to provide more parking spaces than needed. Town Center and The Grove are comprised of general retail, eating and drinking establishments, household stores, entertainment places, and services and institutions. For most retail and commercial service places, the zoning requires a baseline of 1 parking space per 250 square feet. In Town Center and the Grove, however, the parking ratio is approximately 160 square feet per space, which is much higher than the zoning requirement defined by the Village.

The surface parking ratio for residential use is approximately 0.8 spaces per dwelling unit. Since most single-family units were built with garages, the parking ratio can basically meet the demands.



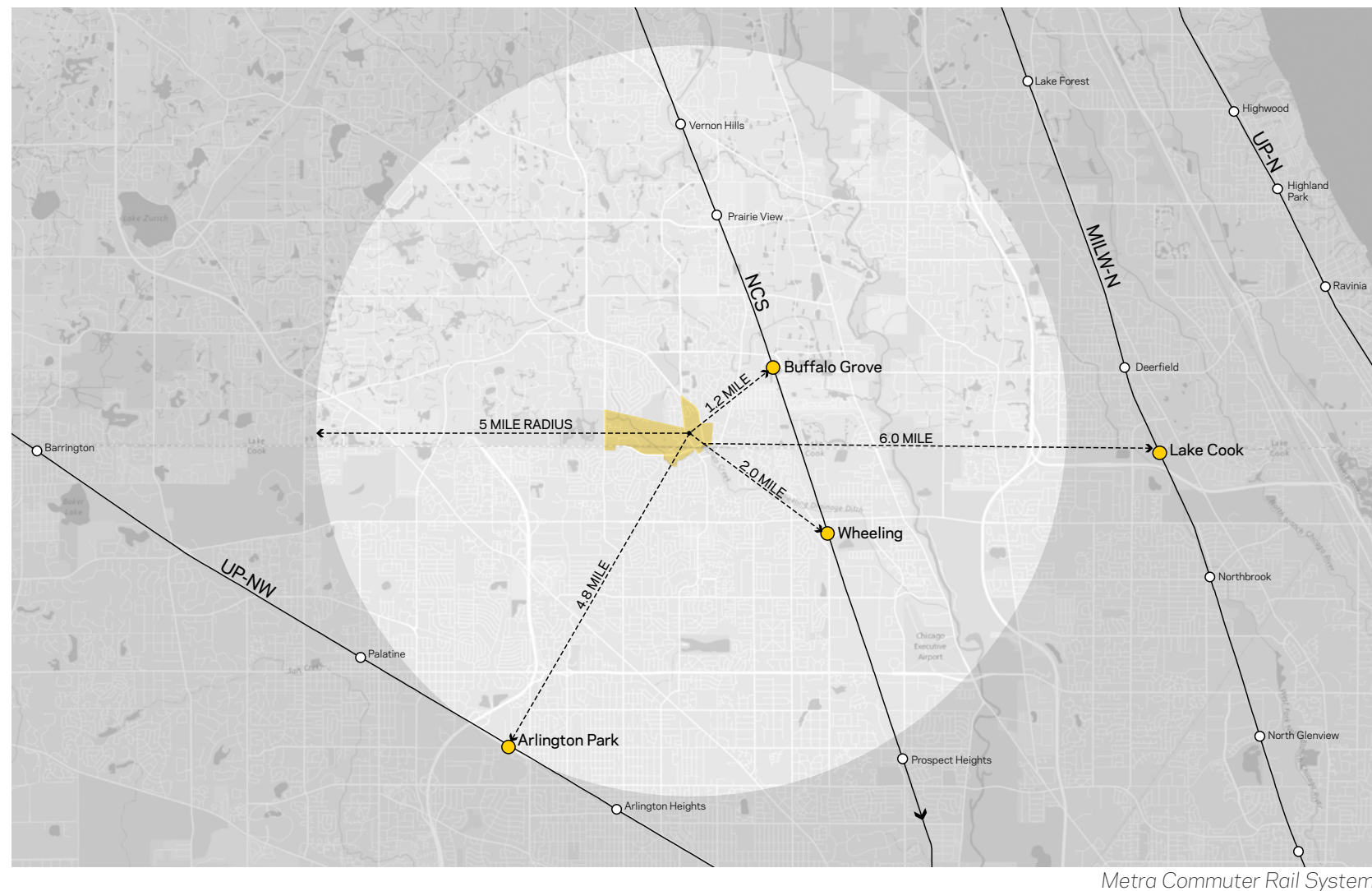


## C. PUBLIC TRANSPORTATION

There are currently no public transit services operating within the Lake Cook Corridor. Metra commuter rail service via the North Central Service Line is available approximately 1.2 miles away at the Buffalo Grove station on Commerce Court off of Deerfield Parkway or just over two miles away at the Wheeling station on Northgate Parkway off of Dundee Road. There are four Pace suburban bus routes that operate in Buffalo Grove (Routes 234, 272, 626, 634), three of which provide connector service to the Buffalo Grove Metra station. These routes primarily operate to the east and south of the

Lake Cook Corridor. The nearest Pace bus stop is at Buffalo Grove Road and Dundee Road, just over one mile south of the Corridor. The fourth bus route travels along Lake Cook Road and connects with the Lake Cook Road Metra station in Deerfield, which is approximately six miles east of the Corridor and is served by the Milwaukee District North Line, but does not extend further west of Lexington Drive. Metra service on the Union Pacific Northwest Line is available approximately 4.2 miles south of the Corridor at the Arlington Park station in Arlington Heights.

Vernon Township, in conjunction with Pace, offers a Dial-A-Ride bus service within the study area that provides door-to-door service to Township residents to any location within the Township on weekdays between 8:30 A.M. and 3:30 P.M. The service utilizes a 10-passenger, wheelchair lift-equipped bus and requires advance reservations.





D. BICYCLE AND PEDESTRIAN SYSTEM

The Lake Cook Corridor has an extensive bicycle and pedestrian network that connects the residential land uses with the Corridor’s commercial areas, religious institutions, cultural facilities, open spaces and recreational assets. While not entirely comprehensive, the network currently connects through the study area along the major streets and through the property boundary between the golf course and adjacent land uses. There is no connectivity of a dedicated trail way through the northern and southern neighborhoods.

All major streets and collectors in the study area, and most of the local streets, have an off-street bicycle facility or sidewalk along one or both sides of the street.

The bicycle facilities are either side paths that run parallel to a street and are generally within the street right-of-way or are multi-use trails that traverse parks and forest preserves within their own right-of-way. The facilities extend to the Buffalo Grove Golf Club, Willow Stream Park, Emmerich West Park, Emmerich East Park, Buffalo Creek Forest Preserve, Buffalo Creek Nature Preserve, Weidner Park, the Community Arts Center, Nicole Park, and Rotary Village Green.

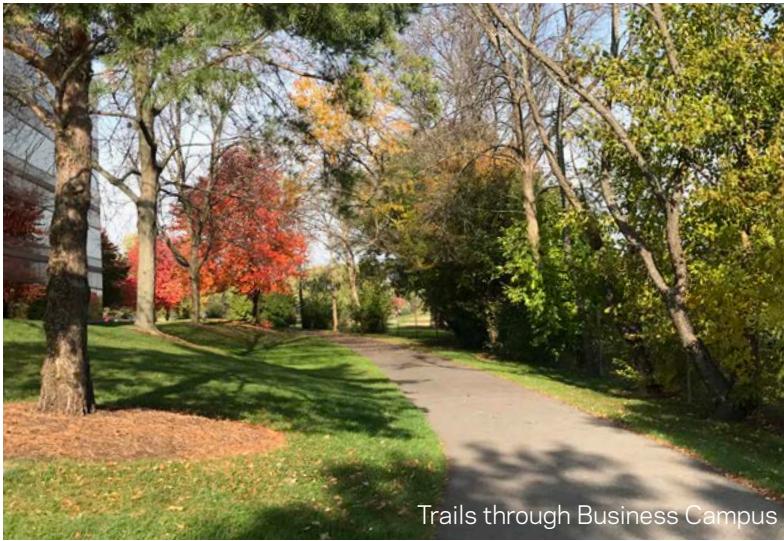
There are a few gaps in the bicycle network within the Corridor that limit continuity of the system and comfortable bicycle access to the Corridor’s shopping centers and parks. The Village of Buffalo Grove’s 2014 Bicycle Plan and 2009 Comprehensive Plan recommend closing these gaps as redevelopment occurs or as funding allows

by constructing new bicycle paths, installing new on-street bikeways or replacing existing narrower sidewalk. There is a limited amount of bicycle parking provided within the Corridor. Wave-style racks are located at the Village Hall, Public Service Center, Post Office, Buffalo Grove Golf Club, and at a few locations within the Buffalo Grove Town Center and Buffalo Grove Business Park (750 Lake Cook Road, 135 Arlington Heights Road). Schoolyard-style racks are located at the Police Headquarters, St. Mary School, Buffalo Grove Business Park (1120 Lake Cook Road), and within The Grove shopping center. Neither of these bicycle rack styles are recommended by the Association of Pedestrian and Bicycle Professionals (APBP).

There are currently no bicycle racks at Emmerich Park, Willow Stream Park, Village Green, the Community Arts Center, Chase Plaza, and Lake County’s Buffalo Creek Forest Preserve.

There are a few gaps in the Corridor’s pedestrian system as well, including at the western end of Weider Road, the south side of Old Checker Road and along the private access drive through Buffalo Grove Business Park. These gaps limit mobility and cause pedestrians to walk in the street.

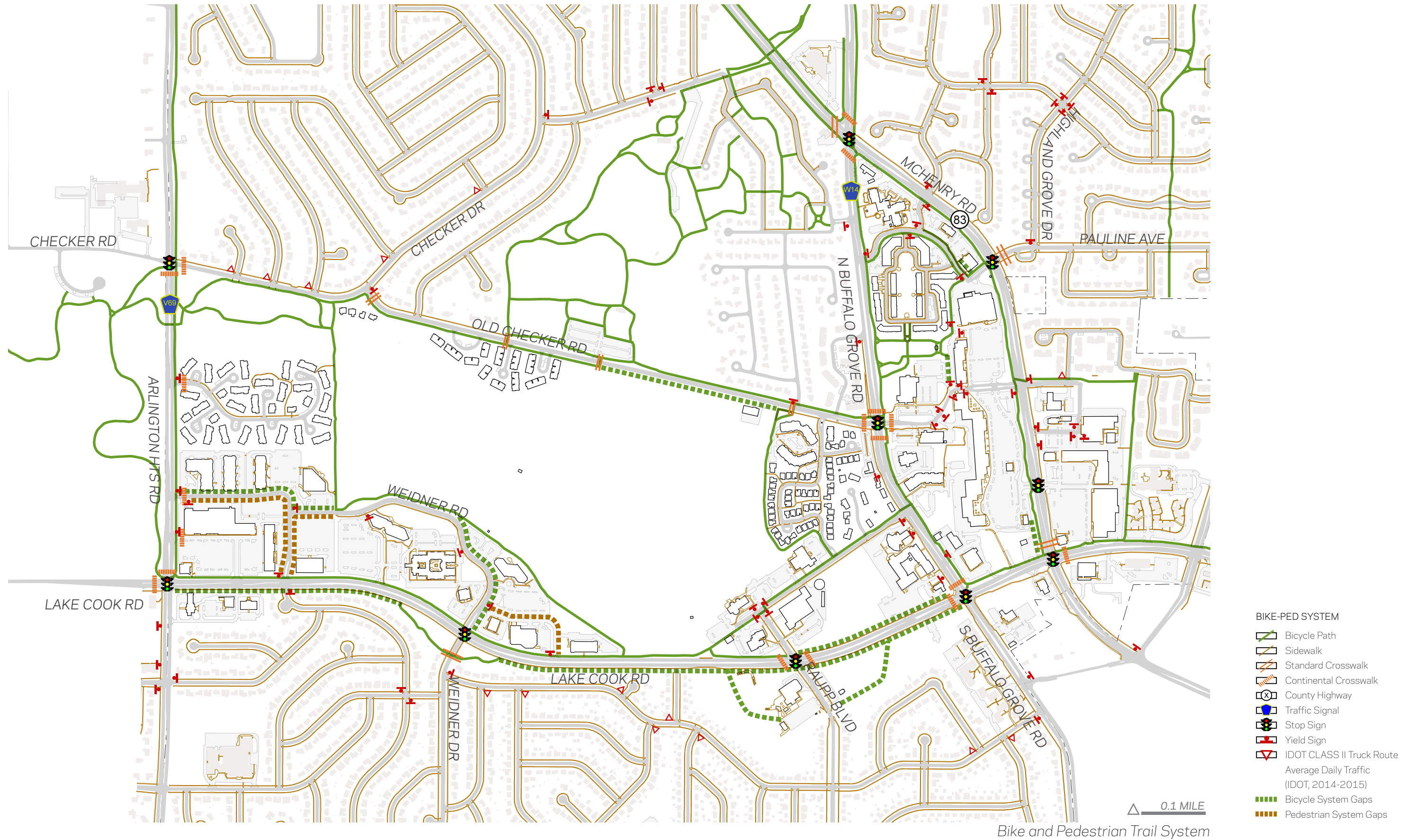
The signalized intersections within the Lake Cook Corridor are the safest locations for pedestrians and bicyclists to cross the street. The intersections along Lake Cook Road, Buffalo Grove Road, McHenry Road, and Arlington Heights Road generally have crosswalks and pedestrian signals, although crosswalks and/or pedestrian signals are missing on some of the approaches of the



intersections. Further, many of the crosswalks in the Corridor are worn or of the standard parallel line style that is less visible to motorists, and the only signalized intersections in the Corridor with pedestrian signals that do not feature countdown displays are those located along Lake Cook Road (McHenry Road, Buffalo Grove Road, Raupp Boulevard, Weidner Road, Arlington Heights Road).

There are three mid-block pedestrian crossings on Old Checker Road that lead into Willow Stream Park. These crossings are supplemented with pedestrian crossing signage in accordance with the Manual on Uniform Traffic Control Devices.





E. PROGRAMMED AND PLANNED  
TRANSPORTATION IMPROVEMENTS

There are several transportation projects within or adjoining the Lake Cook Corridor that are either programmed (funded) for construction over the next five years or are planned (unfunded) by the Cook County Department of Transportation and Highways and the Lake County Division of Transportation. These projects consist of roadway widening and reconstruction, roadway realignment and resurfacing, intersection capacity improvements, and traffic signal installation.

Cook County Department of Transportation and  
Highways (CCDOTH)

*CCDOTH 2015-2019 Transportation Plan  
(Programmed)*

- Lake Cook Road Reconstruction - Roadway capacity issues along Lake Cook Road will be addressed in the near future by Cook County's Lake Cook Road widening project. The roadwork, which is anticipated to start in 2018 and be completed in 2019, will extend the six-lane cross-section of Lake Cook Road west from Hastings Lane to just east of Raupp Road in Buffalo Grove. The project will coincide with the first phase of the Lake County's Weiland Road reconstruction project.

*CCDOTH Planned*

- Weiland Road Reconstruction/Realignment - This future phase of the Weiland Road improvement project will be coordinated by Cook County and includes the widening and realignment of Weiland Road from Lake Cook Road south to Buffalo Grove Road, including the signalization of the intersections of Weiland Road with McHenry Road and Buffalo Grove Road/St. Mary's Parkway.

Lake County Division of Transportation

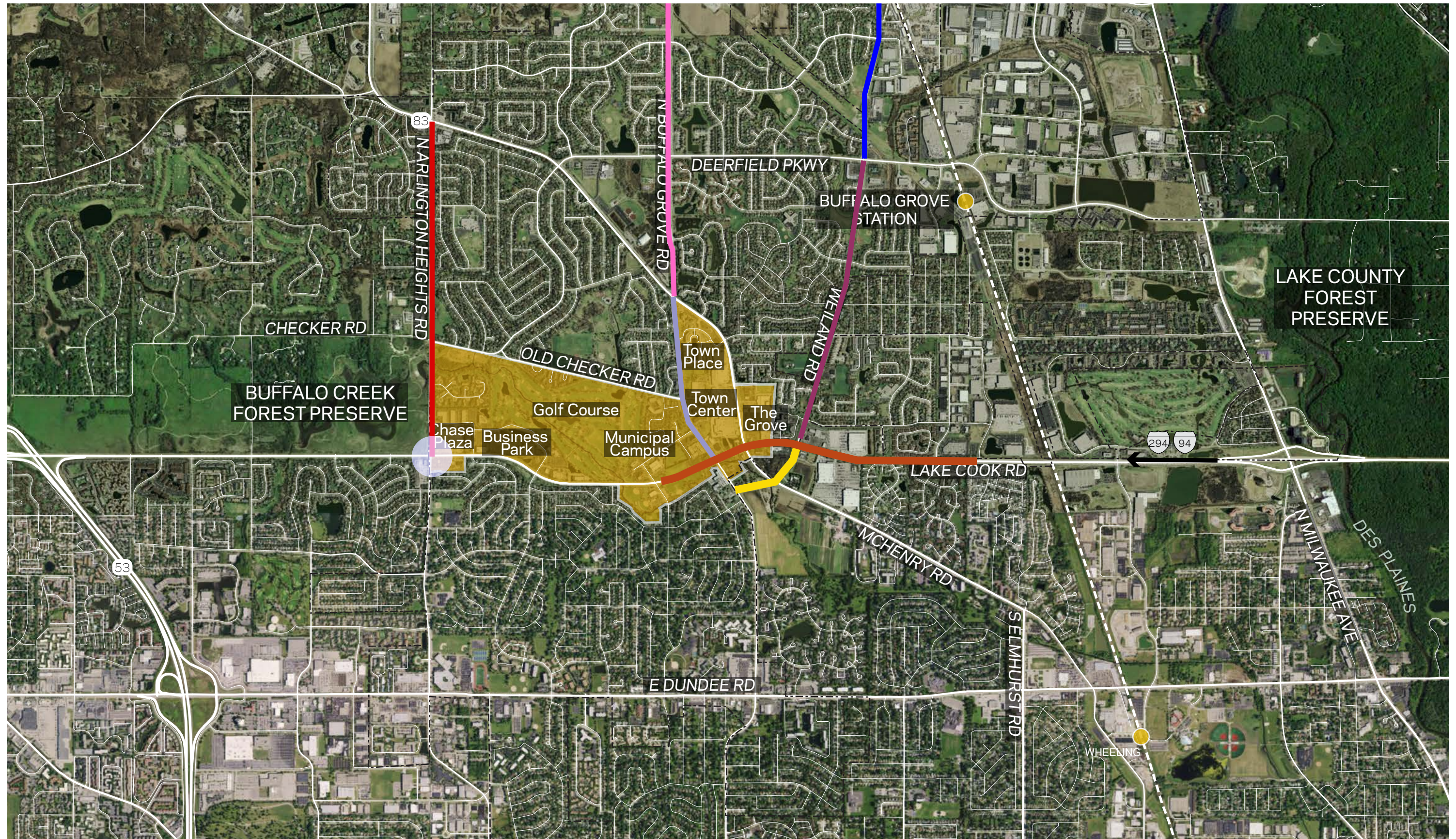
*LCDOT 2016-2021 5-Year Highway Improvement  
Program (Programmed)*

- Weiland Road Reconstruction - Roadway capacity issues and traffic inefficiencies along Weiland Road will also be addressed in the near future by the Lake County's Weiland Road reconstruction project. The first phase of the project will widen Weiland Road to a consistent four-lane cross-section between Lake Cook Road and Deerfield Parkway. This project is anticipated to begin in 2018 and will coincide with the Lake Cook Road reconstruction project.
- Buffalo Grove Road Resurfacing – Roadway resurfacing from Lake Cook Road to IL 83. Scheduled for 2017.
- Buffalo Grove Road Reconstruction – Roadway reconstruction and widening from IL 83 to Deerfield Parkway to Half Day Road. Scheduled for 2020.

*LCDOT Planned*

- Weiland Road Reconstruction – Future phases of the Weiland Road improvement project will be coordinated by Lake County and include the continuation of the road widening project north from Deerfield Parkway to Aptakisic Road ( 2019), and the extension of Weiland Road to align with Prairie Road between Aptakisic Road and IL 22 (2022).
- Arlington Heights Road Reconstruction – Reconstruction of existing five-lane roadway between Lake Cook Road and IL 83 (2022).
- Arlington Heights Road/Lake Cook Road Intersection Improvement – Intersection capacity improvements (2025).





*Programmed and Planned Transportation Improvements*



# KEY FINDINGS

Based on this assessment of the existing physical conditions in the Lake Cook Corridor, there are several key findings of significance to the future planning of the study area. Moving forward in the planning process, these topics may need to be addressed through planning strategies and recommendations incorporated into the Lake Cook Corridor Plan.

## A. LAND USE AND ZONING

### LZ #1: Inconsistency of Zoning Code with Land Use

Within the Study area there is sometimes an inconsistency of the zoning designation with the current land use. For instance, many of the open spaces and parks within the study area, including the Buffalo Grove Golf Course and Willow Stream Park, are zoned Residential. This inconsistency may cause confusion in setting a plan for the Corridor that can accurately guide future development. The study should consider better aligning zoning designations with anticipated land uses.

### LZ #2: Minimal vacant land, but large underutilized spaces

Within the study area there is only 3.1 acres, or 0.7% of the land area that is vacant. This percentage is low compared to the overall Village and the region. However, along the Corridor there are large commercial developments that are significantly underutilized in terms of the quantity and quality of retail and commercial tenants. Furthermore, the amount of land area

that these developments occupy is large compared to the amenities and tax base they provide to the Village. The parking area of the three main retail developments is at a ratio that is higher than the baseline Village zoning requirement (1 space/ 250 sf. of retail) with an average of 1.56 spaces/ 250 sf. of retail. Consideration should be given to strategies that seek to reinvigorate these developments to become better performing retail centers or promote redevelopment of these areas with products that are more in tune with the current and future retail and commercial marketplace.

### LZ #3: Diverse land use components

The Corridor study area has a more diverse and balanced land use profile compared to the overall Village’s land use mix. Open space plays a comparatively large role in the district, at 41%. Retail, entertainment, and hotel, the second largest category, makes up 19% of all land use. Residential is the next largest land use at 14% combined. The future planning of the Corridor has the opportunity to build on this diversity by focusing on a mix of uses, including residential mass, as identified in the Market Analysis Report. In doing so, some elements of the current zoning designation and land use codes may need to be addressed in order to accommodate new typologies of mixed use suburban development including residential, commercial, and parking strategies.

### LZ #4: Lack of Consistent Character /Identity

The Study area is comprised of various building uses, sizes and types built at different times in different architectural styles. The lack of a comprehensive plan has made it difficult to control the character of the district and the relationship

between properties. The plan should facilitate development and a public realm that works together with the adjacent properties to form a cohesive district and a consistent identity.

## B. NATURAL FEATURES

### NF #1: Floodplain Constraints

As identified, 120 acres (12.8%) of the Corridor’s land lies within the FEMA designated Floodways and 100-year floodplain. The majority of this area lies within the Buffalo Grove Golf Course. As identified in the previous study by Burke Engineering in 2014, modification to the Farrington Ditch area to modify and control flooding is possible with appropriate measures. Modification to the Buffalo Creek portion of the floodplain is more complex due to regulatory, engineering, and cost implications. While possible, modification to the floodplain and retention areas will necessitate approvals through numerous governmental and regulatory agencies and incur costs associated with such work. However, addressing flooding in the Corridor in a comprehensive and appropriate way, in balance with the other goals, objectives and constraints of the plan, allows for the most impactful redevelopment opportunity within the Corridor and will reduce the impact on the downstream properties.

### NF #2: Open Space Accessibility and Connectivity

A number of parks and open spaces are adjacent to the Corridor Study Area. Being adjacent to these important natural and recreational assets in the area, the Corridor has a unique opportunity to leverage this potential connectivity to complete and enhance a publicly accessible and well-connected open space network throughout the Village.



## C. TRANSPORTATION

### TT #1: Coordination with Programmed County Transportation Capacity Projects

The current four-lane road capacity of Lake Cook Road is inadequate to effectively accommodate the peak hour volumes using the roadway. When combined with the short spacing between the signalized intersections at Buffalo Grove Road, McHenry Road and Weiland Road, substantial congestion currently occurs in the corridor during the weekday peak periods, which can impede access and be a detriment to the success of the existing and future commercial businesses in the corridor. Cook County's Lake Cook Road widening plan will improve traffic operations and must be incorporated into the land use/transportation plan for the corridor. The Village should continue to be an active participant in this project and other regional transportation projects that impact the Lake Cook Corridor, which is a key action step in the Village's Economic Development Strategic Plan.

### TT #2: Internal Street Continuity within the Corridor

The presence of the Buffalo Grove Golf Club divides the Lake Cook Corridor's commercial areas into two disconnected zones: a west zone (Chase Plaza, Buffalo Grove Business Park) and an east zone (municipal campus, Buffalo Grove Town Center, Grove Shopping Center). Further, the layout of the Buffalo Grove Town Center results in an inefficient street connection along Old Checker Road between Buffalo Grove Road and McHenry Road. Any redevelopment plans within the corridor should address these discontinuities to pull the corridor together into a single cohesive commercial core.

### TT #3: Access to Public Transit Service

Broadening the labor pool by enhancing workforce accessibility is another key action step in the Economic Development Strategic Plan. Residents and employees in the Lake Cook Corridor do not currently have convenient access to scheduled (fixed-route) public transit service. With two Metra commuter rail stations located just two miles away, this lack of access results in increased automobile travel and may hamper efforts by corridor businesses to attract and/or retain employees that reside in the City of Chicago or other non-local areas. There is a close correlation between development density and transit ridership, and redevelopment plans for the Lake Cook Corridor could be the impetus for a greater demand in public transit service to the benefit of current and future residents and employees. The future transit service could be a new Pace commuter rail feeder service to the Buffalo Grove train station on Metra's North Central Service (NCS) Line, an extension of one of Pace's existing Lake Cook shuttle bus service routes that connect several employment centers along Lake Cook Road with Deerfield's Lake Cook Road train station on Metra's Milwaukee District North Line, or a local circulator route. Interim transit services currently available to all residents, businesses and employees in the Corridor include Pace's rideshare matching and vanpool programs, including a traditional vanpool matching service, Metra Feeder Program, and Employer (Corporate) Shuttle Program.

### TT #4: Enhancing Connectivity, Closing Bicycle and Pedestrian System Gaps, and Increasing Street Crossing Safety

Enhancing the multimodal infrastructure in the Village and improving the commuter's "last mile" is another key action step in the Economic Development Strategic Plan. The trail network is not entirely comprehensive, as the northern and southern neighborhoods divided by Lake Cook Road still lack of effective connecting trails. There are a few gaps in the bicycle and pedestrian network that should be closed to maintain a continuous system throughout the Lake Cook Corridor and accommodate comfortable off-street travel between the Corridor's residential subdivisions, businesses areas, and shopping centers. These improvements could include the construction of new bicycle path or sidewalk segments, installation of new on-street bikeways (e.g. combined bike/parking lanes, paved shoulders or shared-lane markings), or replacement of existing narrower sidewalk with wider sidepaths or trails. The signalized intersections within the Corridor are the safest locations for pedestrians and bicyclists to cross the street. Several approaches of these intersections lack crosswalks, pedestrian signals, and/or countdown displays. Further, many of the crosswalks are worn or of the standard parallel line style that is less visible to motorists. The three mid-block pedestrian crossings on Old Checker Road that lead into Willow Stream Park would also benefit from supplemental safety enhancements. There is also a need for more widespread bicycle parking infrastructure within the major shopping centers in the Corridor, the Buffalo Grove Business Park, and the parks and forest preserve to encourage travel by bicycle for short-distance trips by area residents, employees, visitors and patrons.





PART 3 | PUBLIC ENGAGEMENT

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# PUBLIC ENGAGEMENT OVERVIEW

## PURPOSE

As people are the major animators of the public realm, a successful project must be dedicated to an embedded community lens and process. Local communities are both the roots and best stewards of transformation. We are working closely with stakeholders and community members to identify, distill, and communicate their vision and goals for the Village. The solution must stem from who and what is Buffalo Grove to create a place that both sustains the needs of local residents and also expands new opportunities and experiences for current and future community members.

## PROCESSS

**Community Meetings & Supplemental Activities**  
The core of the public involvement strategy revolves around a series of community engagement activities at key milestones of the project process. These meetings allow the Project Team and the Village to gather valuable input from the community on their vision for the project, and their goals, concerns and aspirations for the future of the Village. Throughout the course of the project, the public engagement activities and online forum will utilize techniques for goal setting and visioning, presentations of design alternatives for feedback and input, and open houses or “drop-ins” to communicate the project’s development and build consensus as we move toward a final plan.

## The Corridor Planning Group

To further assist in the development of the Lake Cook Corridor Market Study and Plan, the project team worked with the Village to establish the Corridor Planning Group (CPG). Made up of key stakeholders, taxing bodies and Village representatives, the purpose of the CPG is to provide input on the development of the issues, concerns, goals, and objectives, the alternative concepts, and the recommendations to be carried forward into the Final Plan.

## 4 Forums for Public Engagement

- Broad Public Participation
- The Corridor Planning Group
- Stakeholder Listening Sessions
- Online Forum





**CHARGE:**

To develop Guiding Principles that will direct the project from visioning to implementation.

These guiding principles are:

- A touchstone for key decision milestones
- A way to ensure alignment with the goals and vision throughout the process.
- A way to communicate the vision to your community
- A way to assimilate broad input and value into ideas and concepts for the future of the corridor.

**PUBLIC MEETING 2**  
LATE SPRING / EARLY SUMMER 2017

**PUBLIC MEETING 3**  
SUMMER 2017

**PUBLIC MEETING 4**  
LATE SUMMER / EARLY FALL 2017

**FINAL CORRIDOR PLAN**  
FALL 2017



# THE CORRIDOR PLANNING GROUP

## MEETING 1

The first Corridor Planning Group meeting for the Lake Cook Corridor Market and Study Plan was held on Tuesday, January 17th, 2017 at the Buffalo Grove Village Hall, 50 Raupp Boulevard, Buffalo Grove, Illinois from 5:30 p.m. to 7:30 p.m.

The purpose of this meeting was to identify key issues and concerns with the Corridor study area today as well as generate an initial series of goals and objectives for the study area in the future. The group was introduced to the study and meeting objectives by the project team then lead through a smartphone polling “icebreaker” exercise in which CPG members were asked to respond favorably, neutrally, or negatively to various photographs that characaterized potential conditions of the Corridor today and/ or in the future. This exercise was used to get the group critically thinking about why they reacted to the photographs in the manner they did and set the stage for the workshop activities that followed.

The group was then divided into two sub-groups to particiapte in two worksessions. In the first worksession all CPG members were given several sheets of paper in two colors. They were then asked to think about the Lake Cook Corridor as it exists today and using the paper, to write a word or two on each sheet regarding an issue or concern they



The CPG Meeting Working Process



have with the Corridor or the Study. Once everyone was finished, they placed the notes on the wall and organized them based on commonalities and differences. Each CPG member was then given a chance to speak to their note.

Subsequently, the CPG members were asked to think about what they want the Study to accomplish – what they see as the goals and objectives of the Study. They then wrote a short phrase or statement on another sheet of paper, placed it on the wall and spoke to their comment. Once both groups were finished the CPG came together collectively to organize the topics and distill the list into a common, comprehensive set of Issues and Objectives. This list was then carried forward as the basis for the Public Engagement Meeting 1 polling, along with the findings from Stakeholder Listening Session.

The following lists are the resulting issues and objectives that were identified at the CPG meeting.

#### Group 1 Issues and Concerns:

- Resident impact
- Negative image
- Open space
- Traffic
- Outdated and underutilized retail space
- Connectivity
- Pedestrian friendly (not)

#### Group 1 Goals and Objectives:

- Develop a central gathering space
- Gateway to the Village
- Unified Master plan
- Broadly accessible open space
- Community support
- Diverse offerings
- Multitmodal (cars, peds, bikes)
- Mitigate traffic congestions

#### Group 2 Issues and Concerns:

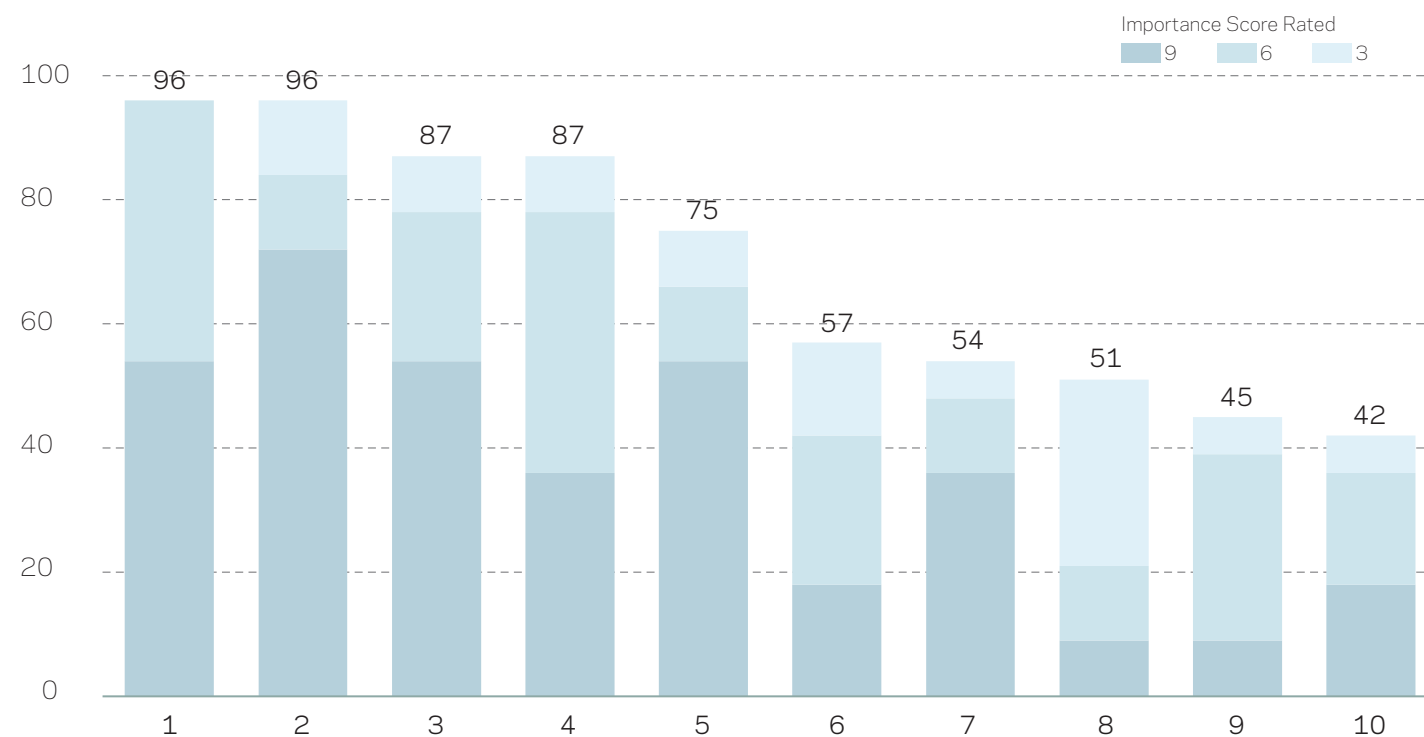
- Boring and obsolete
- Lack of connectivity
- Traffic
- Non-productive
- Lack of vitality and vision

#### Group 2 Goals and Objectives

- Get community buy-in / embraceable
- Create a destination (iconic, focal pt.)
- Provide connectivity (for bikes, pedestrians & vehicles)
- Develop a sustainable solution (political & community)
- Incorporate amenities and open space

After the two groups shared their lists of issues and objectives, they were then asked to rate each objective based on how important it was to them using a 9 (very important), 6 (important), and 3 (less important). Below is the summation of this rating.

#### Goals and Objectives (Rating Results)



Goals and Objective Rating Results

1. Create a Destination (Iconic, Focal point) / Develop Central Gathering Place
2. Get Community Buy-in / Embraceable / Support
3. Develop a Sustainable Solution (Political + Community)
4. Multi-modal (Cars, Pedestrians, Bikes)/ Provide Connectivity (for Bikes, Pedestrian, Vehicles)
5. Unified Masterplan
6. Mitigate Traffic Congestion
7. Broadly Accessible Open Space
8. Diverse Offerings
9. Gateway to the Village
10. Incorporate Amenities and Open Space

# STAKEHOLDER LISTENING SESSIONS

Two stakeholder listening sessions for the Lake Cook Corridor Market and Study Plan were held on Tuesday, January 24th and Thursday, January 26th 2017 at the Buffalo Grove Village Hall, 50 Raupp Boulevard, Buffalo Grove, Illinois from 5:30 p.m. to 7:30 p.m. The meetings were attended by a total of 18 stakeholders combined.

The purpose of the meetings was to provide the opportunity for stakeholders and residents in and around the study area to speak directly to the project team regarding their thoughts, concerns, and aspirations for the Corridor area. Each group was introduced to the study objective and the purpose of the meeting by the project team. After the introduction the meeting was turned over to the stakeholder attendees for an open discussion forum.

The following list of questions was provided to attendees to prompt discussion and aid in facilitating conversation.

## SAMPLE QUESTIONS PROVIDED FOR DISCUSSION AT THE LISTENING SESSIONS

1. When thinking about the Corridor (Study Area) today, what are the major issues that exists?
  - a. Transportation/ Traffic/ Access
  - b. Activity
  - c. Appearance
  - d. Connectivity to and through
2. What are the positive aspects / things you like about the Corridor (Study Area) today?
3. How do you use the study area today? How is it part of your daily life in Buffalo Grove?
4. What would you like to see the Corridor (Study Area) accommodate in the future?
  - a. Activities
  - b. Types of Retail or other uses
  - c. Community Amenities (open space/ civic/ cultural uses)
5. What would be your ideal vision of the Corridor (Study Area) in the future?
6. What do you hope the Study to accomplish for the Corridor (Study Area) and Buffalo Grove?
7. State one Goal or Objective that you have for the Study.



## COMMON THEMES

More quality retail, restaurants, and entertainment is needed in the Village.

The network of pedestrian and bicycle paths are not well connected in the Village and study area.

There are traffic issues related to access to and through the study area.

There are current issues with the visibility and accessibility of the retail along the Corridor.

There is a lack of a destination in the Village, a place where people can go and spend time in a social / civic / recreational setting.

The plan should incorporate and work around the existing site assets and homeowners.

## COMMENTS EXPRESSED

"Buffalo Grove has great housing options and schools. It a bit disappointing that our neighbors like Deerfield, Libertyville, and Lincolnshire have much better **RETAIL AND ENTERTAINMENT** choices to offer."

"We love **TRAILS** to bike and walk. But there are so many dead-end and interruptions."

"I would love a **NEW, ENERGETIC AND WELCOMING** place that provides great **RESTAURANTS** within 5-10 minutes' drive or walk in our Village. I'd like to take my kids to a place to **WALK AROUND** or eat, especially in the summer with outdoor events."

"It would be nice to have a Riverside walk or picnic area along the **BUFFALO CREEK**."

"**DRIVING** entrances and exits within the Town Center is very confusing."

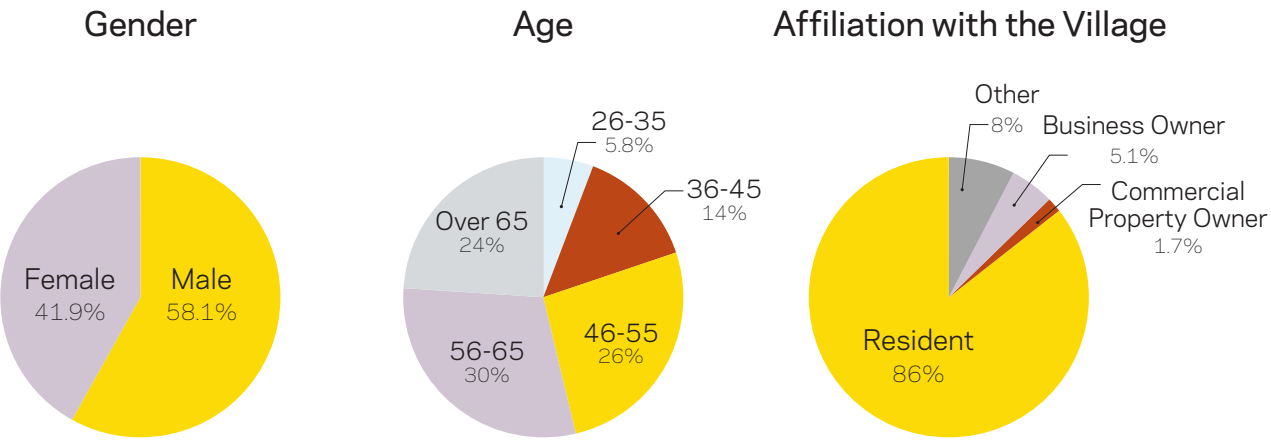
"We lost a few big retailers in the past few years, and we lost a lot of tax dollars. We need to fill in these **VACANT PLACES** with **SHOPPING OR GROCERY STORES**."

# PUBLIC MEETING

## MEETING 1

The first public meeting for the Lake Cook Corridor Market and Study Plan was held on Tuesday, February 7, 2017 at the Buffalo Grove Village Hall, 50 Raupp Boulevard, Buffalo Grove, Illinois from 6:30 p.m. to 8:30 p.m. The meeting was attended by over 150 people. A total of 32 comment forms, 42 idea wall comments and 112 aerial photo notes were received at the meeting.

The meeting was attended by Village board members President Beverly Sussman, Trustee



Participants Demographic Profile

Public meeting Process



Steven Trilling, and Trustee David Weidenfeld; Village staff including Dane Bragg, Jennifer Maltas, Christopher Stilling, Nicole Woods and Darren Monico; Study team members Domenic Salpietra and Baixin Ren from HOK, Janet Henderson and Stephanie Snyder from Images, Inc., Christian Beaudoin and Jack Trager from JLL, Bill Loftus from SPACECO, and Eric Russell from KLOA.

The purpose of the meeting was to inform the community of the Study schedule, scope and process, as well as to provide an opportunity for the community to share their perspective on the concerns and goals regarding the Lake Cook Corridor. The meeting began with an introduction by Village Manager Dane Bragg followed by a formal presentation led by Domenic Salpietra. The presentation outlined the Study scope and schedule. During the presentation, attendees were invited to participate in electronic polling regarding Corridor issues and goals identified by the Corridor Planning Group and community listening sessions. Paper copies of the polling were made available for those without an electronic device. Following the presentation, everyone had the opportunity to review exhibits, post suggestions to an ideas wall, place notes on an aerial photo of the corridor, complete a comment form and meet with representatives from the Village and the project study team.

*Popular comment themes regarding the project:*

1. Golf Course  
Comments regarding the existence of the golf course and usable open space like Liberty Grove.
2. Retail Centers  
Comments regarding the retail centers and improvements –some examples include shopping centers like Deer Park, Schaumburg and Wheeling.
3. Pedestrian Crossings  
Comments regarding pedestrian crossings and safety.
4. Traffic/Congestion  
Comments requesting road improvements to decrease congestion.
5. Survey  
Comments regarding the questions provided on the survey.
6. Current Project Status  
Comments regarding the current project status and thoughts on its progress.
7. Alternatives  
Comments suggesting alternative options for the corridor.
8. Environment  
Comments requesting more green space and keeping the parks and reserves.
9. Cost/Funding  
Comments asking about funding and the cost to the community.
10. Residential  
Comments suggesting bringing in more residential space.
11. Other Issues/Dundee Road  
Other issues, including Dundee Road.
12. Families  
Comments regarding building a community that

- appeals to families with children.
13. St. Mary  
Comments requesting that St. Mary's remains.
14. Stakeholder Involvement Group  
Comments asking about the range of participants in the Stakeholder Involvement Group.
15. Property  
Comments regarding property value based on effects of the project.
16. Comments asking about the range of participants in the Stakeholder Involvement Group.

Comment Category	# of Comments
Golf Course/Open Space	55
Retail Centers	52
Pedestrian Crossings/Bridges	16
Traffic/Congestion	15
Survey	9
Current Project Status	7
Alternatives	6
Environment	5
Cost/Funding	5
Residential	5
Other Issues/Dundee Road	3
Families	2
St. Mary	2
Stakeholder Involvement Group	1
Property	1

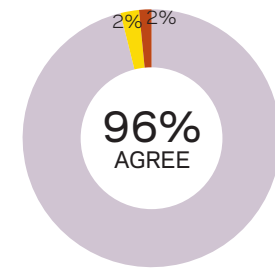




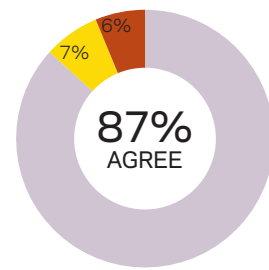


## PUBLIC MEETING 1 SURVEY RESULTS

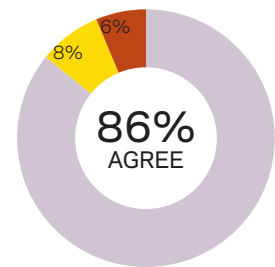
### ISSUES & CONCERNS



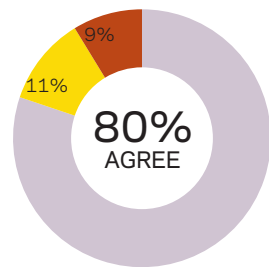
Today, the Corridor contains outdated and underutilized retail space.



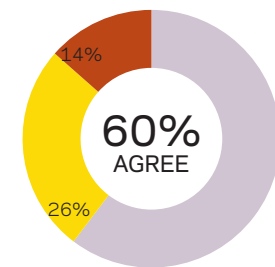
Today, the Corridor has traffic issues, faces traffic congestion and is not very accessible.



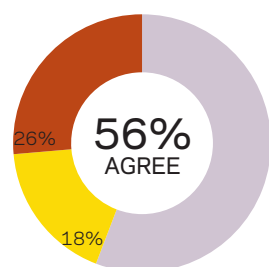
Today, the Corridor lacks of vitality and a vision.



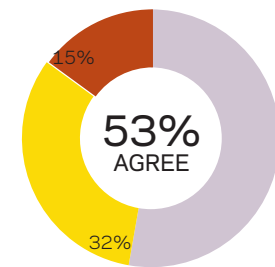
Today, the Corridor is not pedestrian friendly.



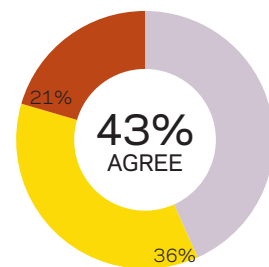
Today, the Corridor is boring and obsolete.



Today, the Corridor's open space is underutilized and not broadly accessible.

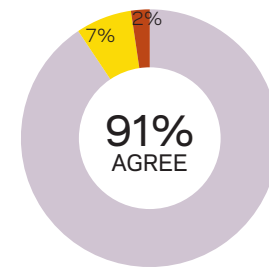


Today, the Corridor lacks connectivity within the area.

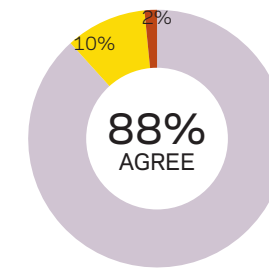


Today, the Corridor has a negative image.

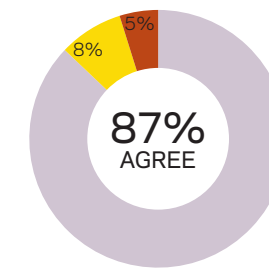
### GOALS & OBJECTIVES



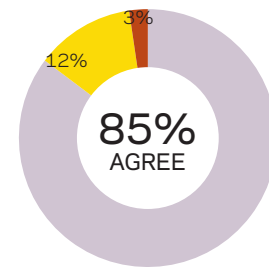
In the future, the Corridor should be developed to be sustainable (environmentally, socially, fiscally).



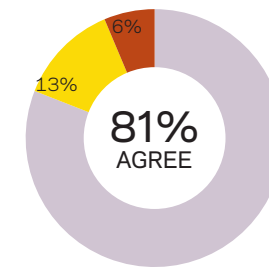
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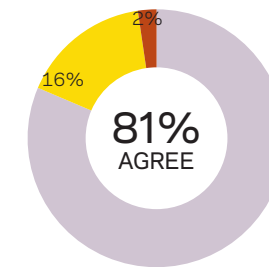
In the future, the Corridor should be multi-modal - incorporating vehicles, pedestrian, and bicycles.



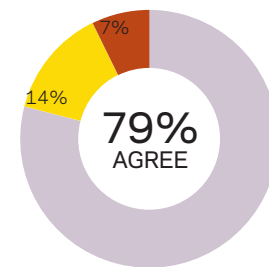
The future, of the Corridor should feature concepts that are embraced by the broad community.



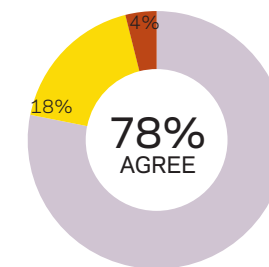
In the future, the Corridor should provide a welcoming gateway to the Village.



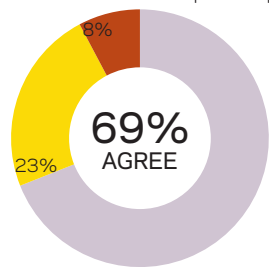
In the future, the Corridor should be guided by a unified and cohesive master plan.



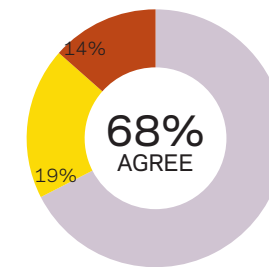
In the future, the Corridor should incorporate recreational and cultural amenities and open space(s).



In the future, the Corridor should provide broadly accessible open space(s).



In the future, the Corridor should provide a diverse mix of uses.



In the future, the Corridor should be a destination / central gathering place in the community.

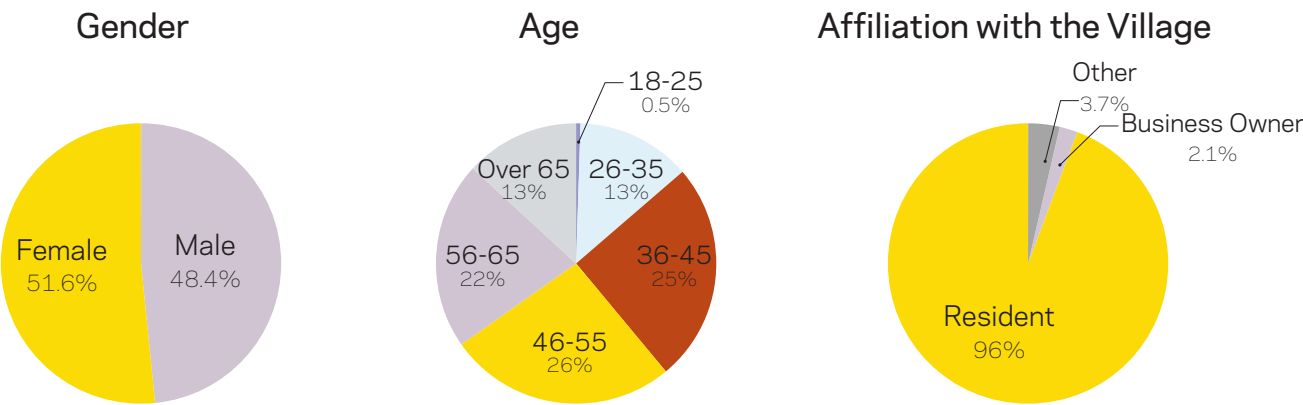


ONLINE POLLING

Subsequent to the first public meeting, an online poll was set up to solicit input from those who could not attend the meeting in person. The survey was activated on February 8th and the questions followed the format of those presented at the public meeting. Concurrent with the release of the poll, the meeting 's presentation and video of the meeting were also uploaded to the website as supplemental documents to help respondents understand the study's goals and process.

The poll ran for 7 days and closed on February 15th. During that period 190 responses were collected from residents, business owners and other stakeholders. And 91 of them left specific comments regarding the Lake Cook Corridor Study, which covered topics such as open space, the golf course, trails, downtown, retail centers, traffic problems, commuting issues, and residential properties and market values.

The summary of the survey responses are as follows.



Participants Demographic Profile



Lake Cook Corridor Market Study and Plan - Online Public Poll Available Until Wed. Feb 15th

Survey Overview

This survey is intended for those who could not attend the First Public Meeting for the Lake Cook Corridor Market and Study on February 7th. The survey is anonymous and meant to collect the thoughts and ideas from Buffalo Grove residents, property owners, businesses, and other stakeholders on the Lake Cook Corridor.


If you were not able to attend, please view the meeting's [presentation](#). The presentation will provide an overview of the project's goals, study area, and process. The presentation also includes a survey, which was taken by audience members on February 7th. The same survey questions are featured below for your input.

After some basic demographic questions, the survey asks if you agree, disagree, or feel neutral on a series of statements. All of these issues and goals have been previously identified by project community outreach efforts such as the Corridor Planning Group and listening sessions held with key stakeholders. There is an opportunity at the end of the survey to write any additional issues, concerns, goals, or ideas regarding the Corridor and the plan.

For further information, please contact Buffalo Grove's Village Planner Nicole Woods at [nwoods@vbg.org](mailto:nwoods@vbg.org) or 847-459-5539.

Next

Powered by  
SurveyMonkey  
See how easy it is to [create a survey](#).



Lake Cook Corridor Market Study and Plan - Online Public Poll Available Until Wed. Feb 15th

Issues and Concerns

The following statements are issues and concerns that have been identified by previous outreach efforts regarding the Lake Cook Corridor. Please read each statement and then click on "Agree", "Neutral" or "Disagree".

\* 4. Today, the Corridor is boring and obsolete.

☐ Agree  
☐ Neutral  
☐ Disagree

\* 5. Today, the Corridor lacks of vitality and a vision.

☐ Agree  
☐ Neutral  
☐ Disagree

\* 6. Today, the Corridor has a negative image.

☐ Agree  
☐ Neutral  
☐ Disagree

\* 7. Today, the Corridor has traffic issues, faces traffic congestion, and is not very accessible.

☐ Agree  
☐ Neutral  
☐ Disagree

\* 8. Today, the Corridor lacks connectivity within the area.

☐ Agree  
☐ Neutral  
☐ Disagree

\* 9. Today, the Corridor is not pedestrian friendly.

☐ Agree  
☐ Neutral  
☐ Disagree

\* 10. Today, the Corridor's open space is underutilized and not broadly accessible.

☐ Agree  
☐ Neutral  
☐ Disagree

\* 11. Today, the Corridor contains outdated and underutilized retail space.

☐ Agree  
☐ Neutral  
☐ Disagree

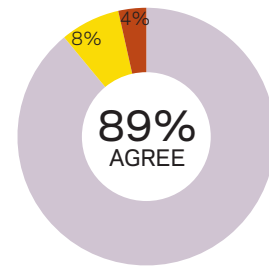
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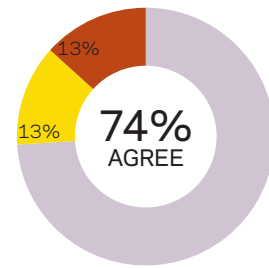


## ONLINE SURVEY RESULTS

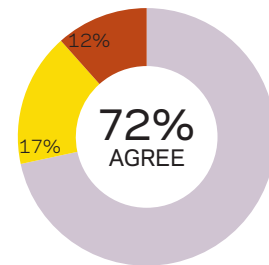
### ISSUES & CONCERNS



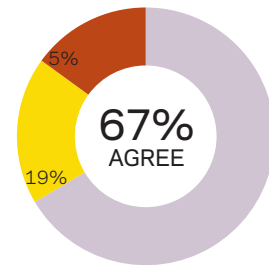
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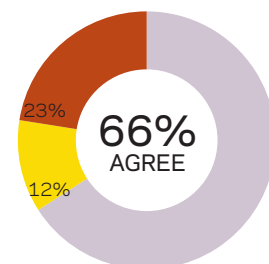
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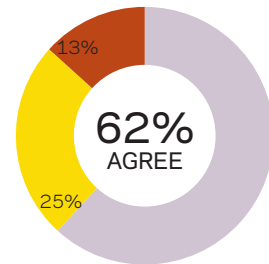
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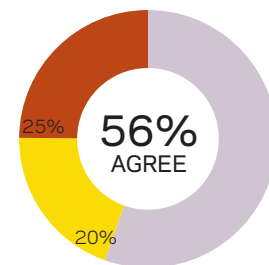
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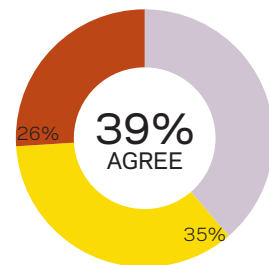
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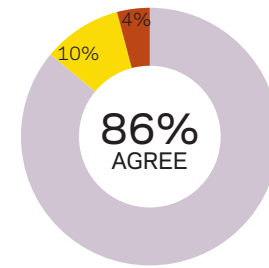


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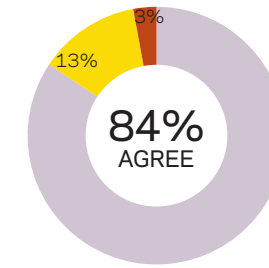


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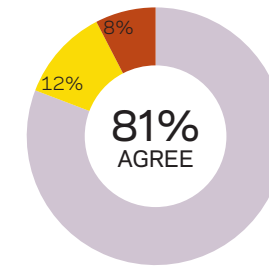
### GOALS & OBJECTIVES



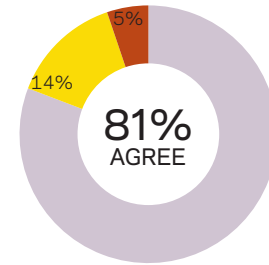
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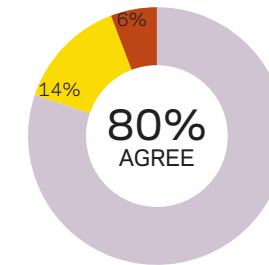
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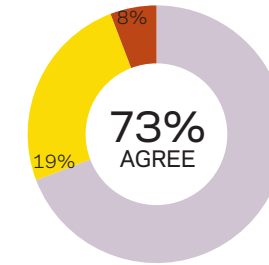
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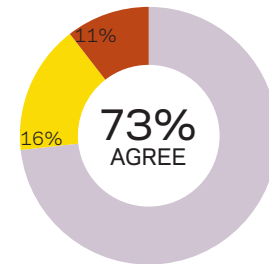
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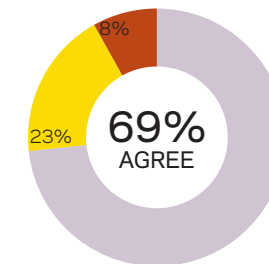
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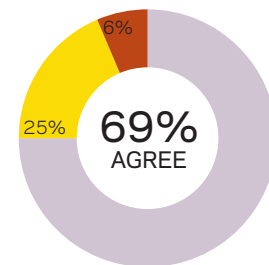
In the future, the Corridor should provide broadly accessible open space(s).



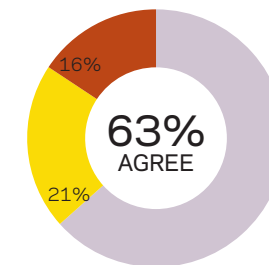
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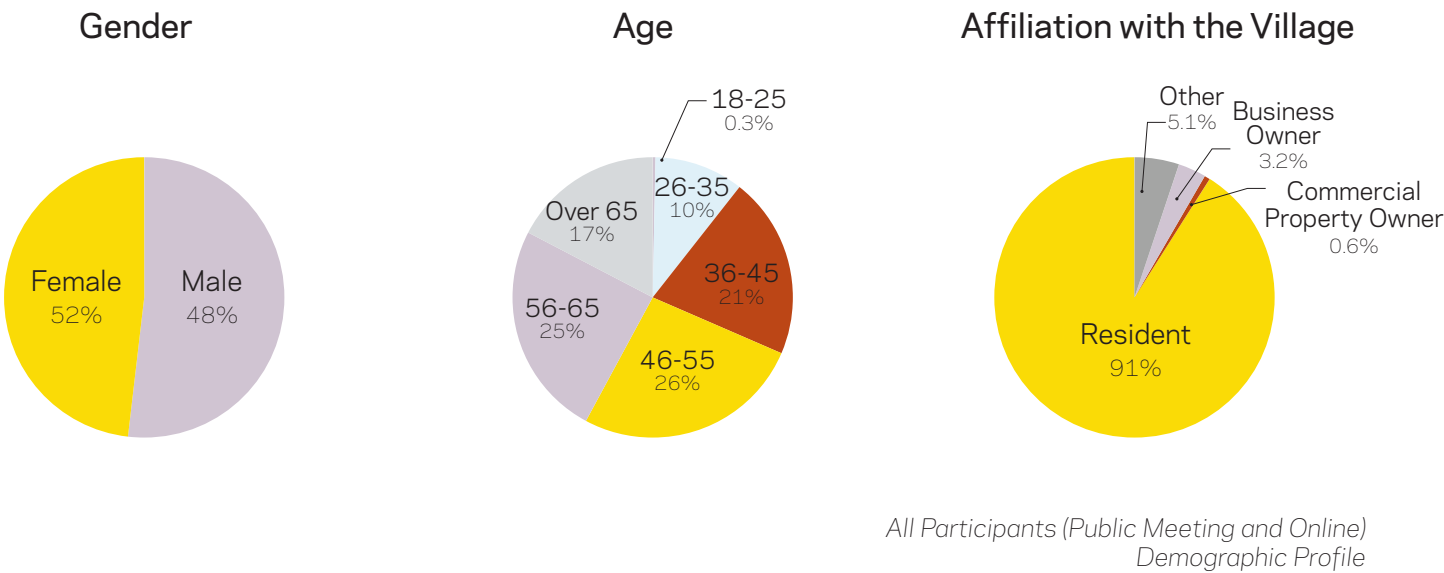


SUMMARY

Overall, the Stage 2 public engagement activities collected over 310 responses to the issues and objectives from public meeting and online polling. Each method was useful in reaching a slightly different group of stakeholder demographics. The male to female ratio was fairly balanced, with slightly more males (58.1%) participating in the public meeting while more females (51.6%) took the online survey. The age range was quite different between the two methods of input with 39% of the online respondents being under 45 years old, compared to approximately 20% in this same age bracket at the public meeting. Furthermore, approximately 24% of the attendees at the public meeting were in the over 65 group while only 13% from the online polling were in the same group.

Throughout the series of public meetings and workshops outlined above, certain key themes repeatedly emerged related to the issues of the study area today and the objectives of the study and vision for the study area in the future. As we can see from the responses of the individual outreach efforts and the compiled results, there was generally broad agreement as to the challenges and opportunities of the Corridor study area. Many of the issues may seem apparent and somewhat obvious, which is a testament to the very real issues the Corridor is currently facing. It is important for the Corridor Study to address these issues as best as possible to have a meaningful impact on the opinions and experience of the residents of the Village.

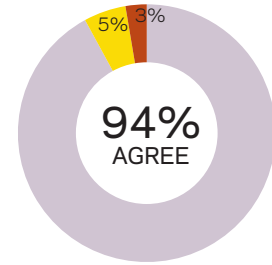
The goals and objectives by and large we also generally agreed with through the various means of discussion and evaluation. These statements will be carried forward and refined with further input from the CPG and stakeholders to form the basis of the guiding principles for the project.



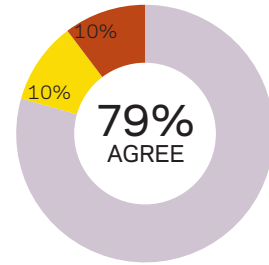


## COMPOSITE PUBLIC MEETING AND ONLINE SURVEY RESULTS

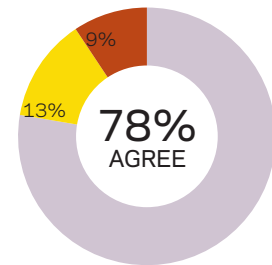
### ISSUES & CONCERNS



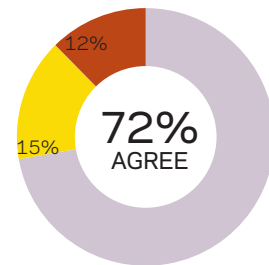
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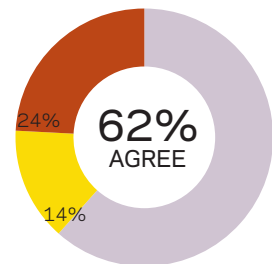
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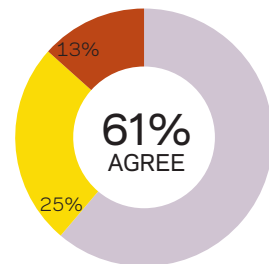
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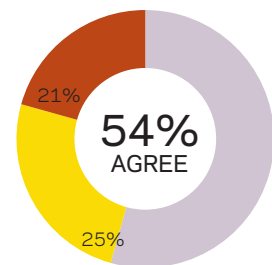
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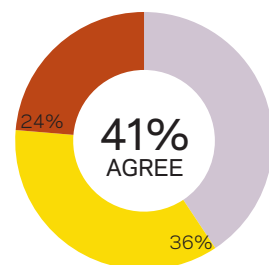
Today, the Corridor's open space is underutilized and not broadly accessible.



Today, the Corridor is boring and obsolete.

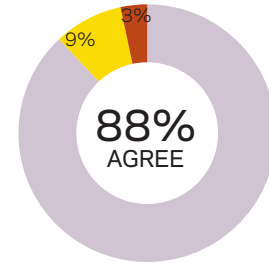


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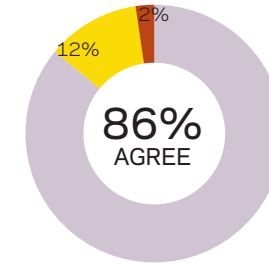


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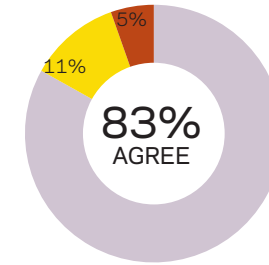
### GOALS & OBJECTIVES



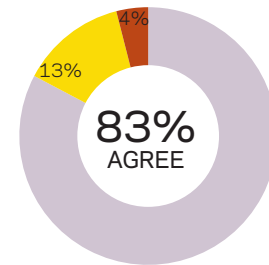
In the future, the Corridor should be developed to be sustainable (environmentally, socially, fiscally).



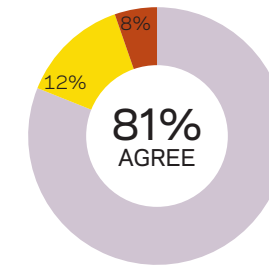
In the future, the Corridor should mitigate traffic congestion.



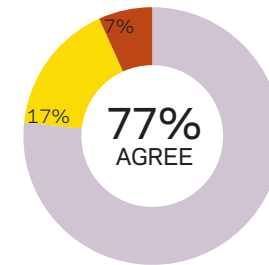
In the future, the Corridor should be multi-modal - incorporating vehicles, pedestrian, and bicycles.



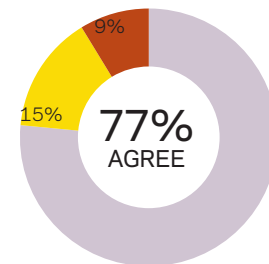
The future, of the Corridor should feature concepts that are embraced by the broad community.



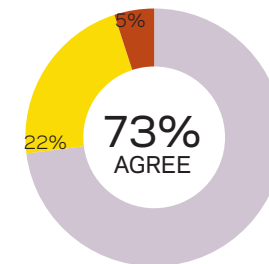
In the future, the Corridor should be guided by a unified and cohesive master plan.



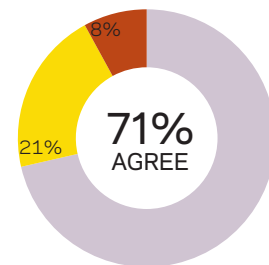
In the future, the Corridor should incorporate recreational and cultural amenities and open space(s).



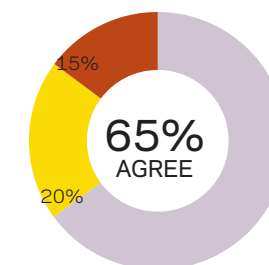
In the future, the Corridor should provide a welcoming gateway to the Village.



In the future, the Corridor should provide broadly accessible open space(s).



In the future, the Corridor should provide a diverse mix of uses.



In the future, the Corridor should be a destination / central gathering place in the community.



