

SECTION 3

MARKET ASSESSMENT

This market assessment applies demographic and financial analysis with an understanding of trends to provide a context for the decisions that will be included in the study area plan. For example, dramatic shifts caused by baby boomer retirement and millennials forming families require new housing types. Also, Internet shopping has reduced the need for retail space and increased the demand for warehousing and delivery outlets. The result is a very competitive environment that extends beyond study area boundaries into a regional market where communities and projects are changing existing development patterns. To succeed in this market, plans must anticipate future trends to devise a development strategy and carve out a market niche that incorporates both this changing market and each of the study area community's aspirations. The plan must also respect the study area's development history and strengthen existing businesses.

The Route 83 Corridor spans a critical region that impacts the economies of adjacent communities. It is the main north-south arterial route falling between Interstates 355/53 and 294. For many users it is the preferred connection to the O'Hare cargo operations, and the recently announced plans for western cargo development could make that role even more important. This regional position complicates development decisions because there are yet to be realized plans to add western passenger access to O'Hare Airport. The nature of these changes points to Route 83 becoming an even more significant O'Hare access route in the future.

The focus here is on understanding potential user behaviors and development innovation to identify land use opportunities and provide plan guidance. By respecting the current conditions while understanding that planning decisions often dramatically shift future opportunities, this market assessment provides a framework for market interventions that move from immediate tactics, through potential lean development to dramatic, high investment opportunities to be identified in the final plan.



A clear understanding of the existing land use and national, regional, and local development trends are vital to preparing a corridor plan that supports appropriate existing uses and identifies market supported new residential and business opportunities.

This knowledge enables the Corridor Plan Steering Committee to identify land use policies that fit a future market positioning, and marketing strategy that improves the economic contribution of Route 83 to adjacent communities' tax base. The information that follows examines the conditions and trends that will guide future development along the corridor.

EXISTING POPULATION & EMPLOYMENT

The table in Figure 3.1 compares demographic and employment data in the study area to both the combined population of all study area communities and DuPage County. Although resident demographics are quite similar for all three populations, the ratio of jobs to residents is dramatically different in the study area and the residential density is lower than the density in surrounding communities.

49.4%

Share of jobs along the Route 83 Corridor study area that are within the municipalities that comprise the corridor

| | STUDY AREA | COMMUNITIES | DUPAGE | STUDY AREA % COMMUNITIES ¹ | STUDY AREA % DUPAGE |
|--------------------------|------------|-------------|-----------|---------------------------------------|---------------------|
| Jobs | 50,488 | 102,180 | 646,913 | | 8% |
| Total Population | 42,285 | 137,703 | 936,874 | | 5% |
| Ratio of jobs/population | 1.2 | 0.7 | 0.7 | 161% | 173% |
| Population/Square Mile | 2,827 | 3,881 | 2,783 | 73% | 102% |
| Median Age | 37.7 | 38.1 | 39.0 | 99% | 97% |
| Average Household Income | \$104,401 | \$100,715 | \$116,502 | 104% | 90% |
| Median Household Income | \$71,839 | \$71,379 | \$83,068 | 101% | 86% |
| Per Capita Income | \$35,670 | \$35,661 | \$43,305 | 100% | 82% |
| 0 Vehicles Available | 3.9% | 4.3% | 3.9% | 92% | |
| Employees | 50,488 | 102,180 | 646,913 | | 8% |
| Median Home Value | \$272,101 | \$278,670 | \$296,146 | 98% | 92% |



Notes:

- 1. The study area and DuPage County include data for unincorporated land, but the communities do not.
- 2. The Marketing Data appendix contains additional demographic data.

FIGURE 3.1
STUDY AREA POPULATION

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Housing

The table in Figure 3.2 reveals that residential development is newer in the study area than the surrounding communities but not as recent as the overall development of DuPage County.

The housing age categories are designed to differentiate potentially historic properties built before 1950, from housing where needed repairs could exceed the cost of new construct and therefore tear down pressure exists, (housing built from 1950 to 1979) and relatively new houses built since 1980. Information shared by the County on code violations in unincorporated areas suggests that further study could reveal housing redevelopment possibilities.



| | STUDY AREA | COMBINED | DUPAGE |
|--------------------|------------|-----------|-----------|
| Single Family | 74.4% | 72.3% | 72.1% |
| Built Before 1950 | 20.0% | 24.9% | 43.6% |
| Built 1950 to 1979 | 55.2% | 57.4% | 47.2% |
| Built Since 1980 | 24.8% | 17.7% | 9.2% |
| Median Home Value | \$272,101 | \$278,670 | \$296,146 |

FIGURE 3.2
RESIDENTIAL DEVELOPMENT

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Jobs

As shown in Figure 3.3, examination of the jobs in the study area reveals that, although there still are more jobs per household in the study area than the surrounding communities and DuPage County, the number of jobs in the study area communities is declining (based on available data, it is not possible to isolate the employment loss in the study area).

The graph in Figure 3.4 compares jobs in the study area to employment in the combined communities, DuPage County, and the Chicago MSA. As this data reveals, both the study area and its combined communities have a greater concentration of manufacturing, wholesaling, and transportation jobs than DuPage County and the Chicago region. The table in Figure 3.5 uses CMAP's Community Profiles to document employment and land use by category. It suggests a logical relationship between the amount of industrial land and the manufacturing and wholesale trade jobs.

| | STUDY AREA | STUDY AREA COMMUNITIES | DUPAGE COUNTY |
|--------------------------------------|------------|------------------------|---------------|
| Jobs | 50,488 | 102,182 | 646,913 |
| Jobs /Household | 3.5 | 2.1 | 1.9 |
| Private Sector Job Change, 2005-2015 | - | -7,201 | 24,522 |

FIGURE 3.3
JOBS PER HOUSEHOLD

Source: © 2017 Easy Analytic Software, Inc. (EASI®) All Rights Reserved, Alteryx, Inc.

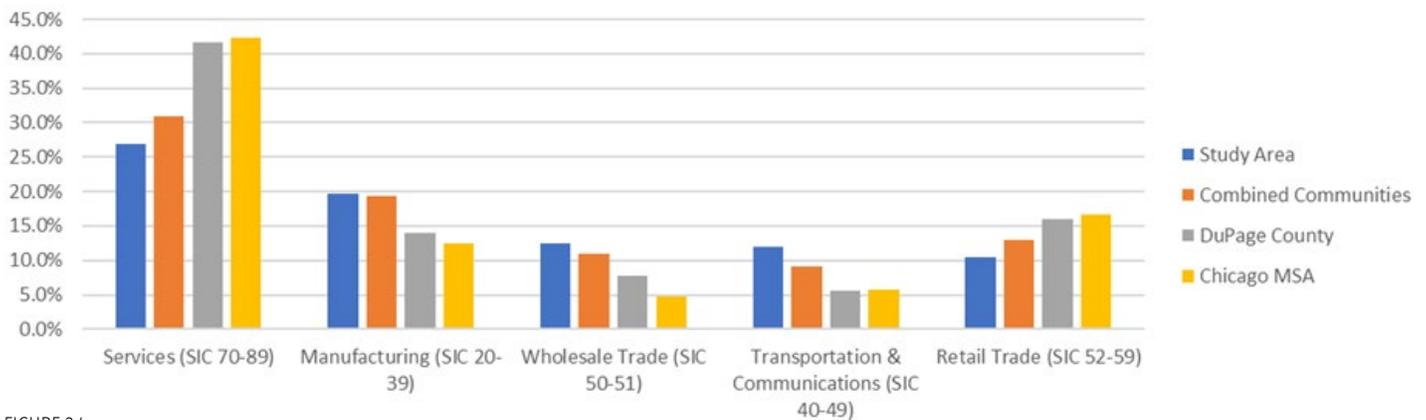


FIGURE 3.4
EMPLOYMENT BY SELECTED MAJOR BUSINESS CATEGORY

Source: Q2 2018 Dunn & Bradstreet business location records that have a valid telephone, known SIC code and D&B rating excluding businesses that operate from a residence.

| | ADDISON | BENSENVILLE | ELMHURST | VILLA PARK | WOOD DALE |
|-------------------|---------|-------------|----------|------------|-----------|
| Manufacturing | 6,253 | 4,581 | 1,996 | 991 | 2,474 |
| Retail Trade | 4,153 | 3,860 | 2,350 | 1,538 | 2,186 |
| Wholesale Trade | 1,560 | 2,415 | - | - | 1,291 |
| % Industrial Land | 19.9% | 28.1% | 7.8% | 3.7% | 18.4% |
| % Commercial Land | 5.0% | 3.8% | 5.5% | 9.5% | 4.7% |

FIGURE 3.5
EMPLOYMENT IN CORRIDOR COMMUNITIES

Source: U.S. Census Bureau, Longitudinal-Employer Household Dynamics Program, Chicago Metropolitan Agency for Planning Parcel-Based Land Use Inventory



Summary

Although this data reveals that the study area is demographically like the surrounding communities, it also reveals differences in job growth and housing age. The loss of jobs in the study area communities is a trend that needs further consideration in plan making tasks, including an understanding of whether the study area communities support replacing manufacturing industries with uses such as housing or distribution.

As this project advances, it should create a collective vision for use transitions. Policy questions to consider include:

1. Should residential redevelopment be promoted?
2. What types of housing should be encouraged?
3. What is the optimal long-term balance between jobs and households?

The trend information that follows will be important input into these policy decisions.

EXISTING REVENUE BASIS

The study area communities obtain revenue through a variety of fees, property tax and sales tax revenue. The analysis that follows examines the current revenue from taxes on retail sales and property value. Both sales tax and property tax are categories that can be compared across communities and are impacted by land use and development policy decisions.

Municipal Sales Tax

Figure 3.6 illustrates the study area communities' municipal sales tax revenue growth since 2011. In 2017, this was a 1% tax on sales of \$3.7 billion in the combined communities. Besides this state mandated revenue to each community, study area communities all apply an additional ½ % to 1% home rule or non-home rule sales tax revenue on sales within the study area.

The table in Figure 3.7 reports the municipal sales tax revenue growth by municipality.

| | 2012 | 2013 | 2014 | 2015 | 2016 | 5 YEARS |
|-------------|-------|-------|-------|-------|-------|---------|
| Wood Dale | 1.2% | 2.5% | 7.6% | 4.3% | -2.5% | 6.3% |
| Villa Park | 0.2% | 6.7% | 11.1% | 4.8% | 6.5% | 21.2% |
| Bensenville | 11.8% | -2.6% | 2.8% | 7.8% | 9.5% | 19.0% |
| Addison | -0.4% | 4.8% | 5.3% | 11.8% | -3.6% | 24.2% |
| Elmhurst | 11.5% | 6.7% | 9.3% | 5.3% | 2.8% | 28.7% |
| Combined | 5.3% | 4.3% | 7.4% | 7.1% | 2.2% | 22.6% |

FIGURE 3.7
MUNICIPAL SALES TAX REVENUE GROWTH

Source: Illinois Department of Revenue, BDI

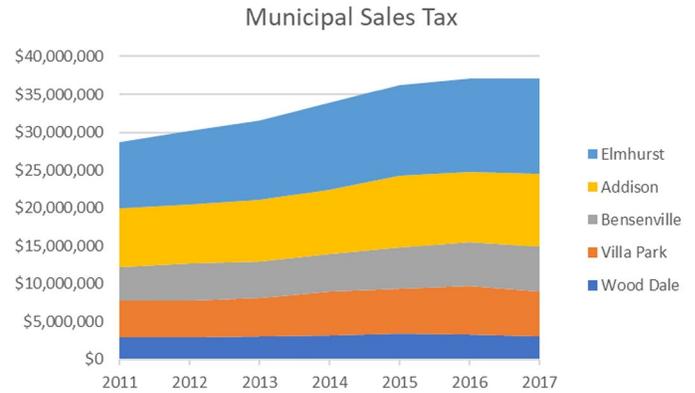


FIGURE 3.6
MUNICIPAL SALES TAX, 2011-17

Source: Illinois Department of Revenue, BDI



Agriculture & Manufacturing Sales Tax

The 48,400 households in the study area communities on average are estimated to annually spend approximately \$33,500 each in Illinois taxable goods, providing sales of about \$1.6 billion. That suggests that the study area communities attract \$2 billion in spending from other communities. Although some of that spending occurs in the high-volume stores along Route 83 in Villa Park and Elmhurst, another important source is revealed by analyzing the Agriculture and Manufacturing sales tax categories. Figure 3.8 illustrates the \$1.2 billion in study area communities' sales in these categories.

A full list of the sales that fall into these categories is at: <https://www.revenue.state.il.us/app/kob/terms.jsp>

Although these categories are notorious for classification errors, they generally cover sales taxes on landscape and construction equipment/materials, as well as items sold by manufacturers directly to consumers or businesses. Any warehouse that distributes directly to Illinois consumers pays all local sales taxes on those purchases to the municipality where it is located. As determined by a recent US Supreme Court decision, sales to consumers in other states are taxed at the other state's rates and those taxes are paid to that state.

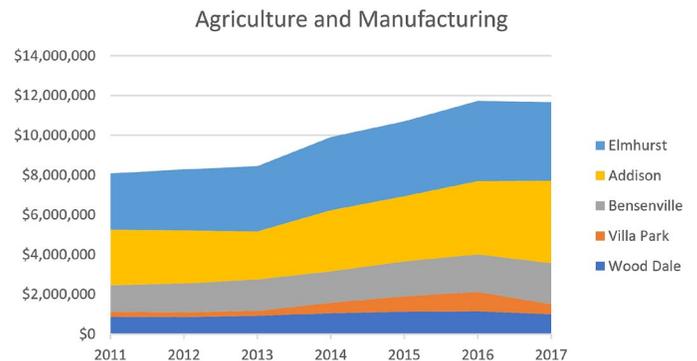


FIGURE 3.8
AGRICULTURE & MANUFACTURING SALES TAX, 2011-17

Source: Illinois Department of Revenue, BDI

Eating & Drinking Sales Tax

The Eating and Drinking Places category reveals sales taxes collected by restaurants as well as cafeterias and resident meals in institutions such as hospitals, colleges, and senior facilities. Purchasing power projections estimate that study area residents spend \$190 million on food and drinks away from home. Figure 3.9 illustrates the split of municipal sales taxes on the \$269 million in study area communities' restaurant sales.

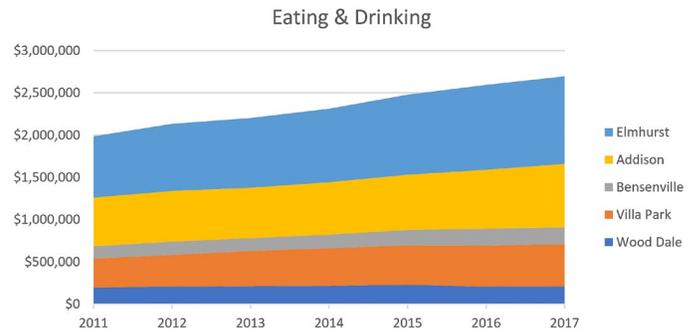


FIGURE 3.9
EATING & DRINKING SALES TAX, 2011-17

Source: Illinois Department of Revenue, BDI

Property Tax

The Equalized Assessed Value (EAV) of properties is the basis for calculating property taxes. Figure 3.10 compares the EAV's of study area communities to DuPage County and calculates the contribution of industrial and commercial land to total EAV.

Generally, schools, which are the primary beneficiaries of property tax revenue, strongly support maximizing commercial and industrial EAV because they generate revenue without costs from additional students. EAV increases with new development and redevelopment of aging properties. It declines as properties become vacant.

| | ADDISON | BENSENVILLE | ELMHURST | VILLA PARK | WOOD DALE | DUPAGE COUNTY |
|--|---------------|---------------|-----------------|---------------|---------------|-----------------|
| 2015 Equalized Assessed Value (EAV) | \$981 million | \$502 million | \$2,034 million | \$509 million | \$491 million | \$33,90 million |
| Acres | 6,392 | 3,587 | 6,601 | 3,050 | 3,098 | 215,304 |
| EAV/Acre | \$153,409 | \$139,816 | \$308,156 | \$166,754 | \$158,511 | \$157,453 |
| Commercial & Industrial EAV | \$407 million | \$292 million | \$288 million | \$118 million | \$208 million | \$8,276 million |
| % Total EAV from Commercial & Industrial | 41% | 58% | 14% | 23% | 42% | 24% |

FIGURE 3.10
COMPARISON OF 2015 EQUALIZED ASSESSED VALUE (EAV)

Source: CMAP Community Data Snapshot



Summary

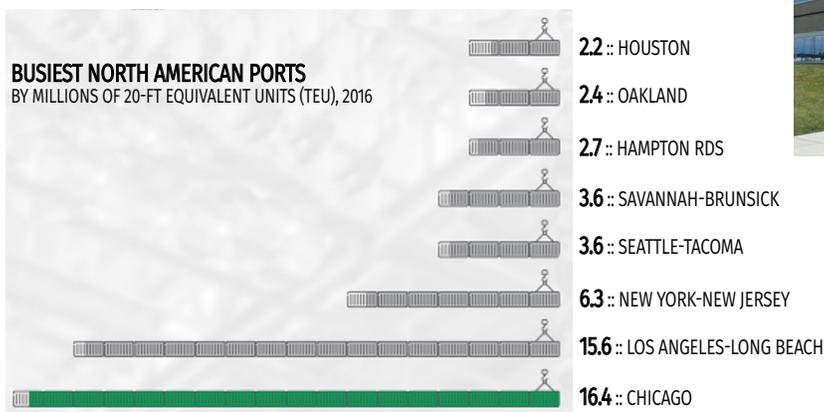
In many respects the combined study area communities are quite successful in establishing a strong tax revenue base. Although sales tax revenue to individual corridor communities varies, the Route 83 region is very successful in attracting taxable sales. Receipts significantly exceed the amount spent by residents both because Route 83 provides the traffic counts desired by high volume retailer and warehousing and manufacturing offer non-store sales tax. As this study continues, gaining a better understanding of the connection between distribution facilities and taxable goods is important. The communities with higher industrial and commercial property percentages offer a desirable basis for lower residential property taxes. As this study progresses, policy questions to consider include:

1. What types of redevelopment will increase the EAV supporting property tax revenue?
2. What policies will attract manufacturers and warehouses that provide sales tax revenue?
3. How does the potential Western access to O'Hare impact tax revenue?

PREPARING FOR THE FUTURE

As stated in this report’s Planning Issues and Opportunities section, most of the unincorporated areas being studied are, and are expected to remain, residential. However, before planning a residential future it is worth examining the possibilities of capitalizing on location in the North DuPage Industrial Submarket, an important element of the nation’s most active port, Chicago.

CBRE’s 2018 Chicago Industrial Outlook included Figure 3.11 and described Chicago’s port as, “In addition to the highly established class A railroad system, O’Hare International airport, the third busiest in the world, provides direct freight service around the globe. The developed intrastate highway infrastructure is one of the best maintained systems in the United States, ranking only second behind New York, nationally. The Chicago metropolitan area is the principal inland port in North America.”



The North DuPage Industrial Market is a major component of the Chicago Inland Port that sets the overall economy of the study area as it provides employment, daily commercial activity, and reasons for residents to locate in study area communities. The still developing program for the western expansion of O’Hare Airport is central to the future of all commercial and residential markets.

The information that follows looks at the demand and configuration of potential future development by category.



FIGURE 3.11
BUSIEST NORTH AMERICAN PORTS, 2016
Source: CBRE’s 2018 Chicago Industrial Outlook

Retail

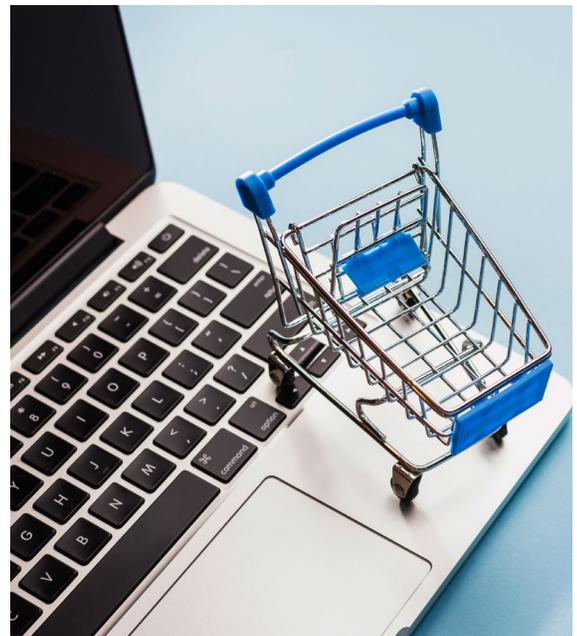
Retailers are offering their customers the opportunity to browse and place orders online with the quick-in-store same day pickup option. This is online shopping without having to wait for your item to ship. For large format retailers, this trend translates into having smaller and fewer stores, because the consumers shop at home and will travel to obtain their goods. Thus, display areas or a large sales floors are no longer needed. Following this trend, more than 10,000 national chain stores are expected to close this year. Smaller and often independent retailers responded to this change by creating an Internet presence and increasing sales by attracting business from a larger market. Additionally, local independent retailers report losing sales to more aggressive Internet participants.

The challenge for this study is determining which now vacant or under performing study area strip centers can accommodate new formats, which were not imagined when Route 83 buildings were constructed and its regulations were established.

Preparing for these formats may require changes in physical space and occupancy policies. The new space possibilities include:

- Splitting space for smaller stores
- Allowing stores within a store
- Expecting shorter leases
- Allowing seasonal businesses
- Reserving Parking for Buy Online Pick-up In Store (BOPIS)

Another possibility is redevelopment to accommodate e-commerce delivery.



Warehouse and Logistics Buildings

E-commerce has also changed industrial logistics and warehouse design. The changes include the need for larger warehouse spaces and smaller, infill logistics properties that can accommodate same day shipping. According to Jon Pharris, president of industrial developers and owner of CapRock Partners, “Warehouse space design is already different than it was five to 10 years ago. For example, prior to the e-commerce evolution, industrial developers would maximize every square foot of a property and build the largest building possible on a parcel of land, leaving little room for employee parking. However, e-commerce tenants require significantly more parking availability for their employees, especially during the peak season, approximately Aug. 1 through Dec. 31. E-commerce users generally do not use as many dock high doors as a typical industrial tenant. They are converting their unused truck courts to expand parking availability and create employee amenity areas.” <https://caprock-partners.com/the-rapid-change-underway-with-industrial-logistics/>.

The fastest developing category, known as “Last Mile Distribution,” is misnamed because it generally serves the larger, approximately 30-minute drive time. These logistics businesses must accommodate semi-trucks delivering from million square foot product warehouses. Their core business involves employees sorting and loading panel trucks in an area that is generally less than 50,000 square feet. Additional employees drive the delivery trucks dispatched to homes. This means that as much as 40% of these site’s area is reserved for employee parking and truck access. For the study area, this new development format may provide an opportunity, especially for businesses that collect sales taxes at this last point before goods are delivered to customers. It also could support adding employee amenities and sales of gasoline and services to the delivery vehicles.

The Table in Figure 3.12 confirms the opportunity for additional industrial, warehouse and logistics buildings. With a vacancy rate at 2.2% to 3% and availability that adds sublease only slightly higher, there is unmet demand from businesses actively seeking this commercial real estate product. The challenge is delivering attractive new construction at a cost that makes the market rate lease rate of \$6.50 per square foot an acceptable return on investment.

| Submarket | Rentable Building Area (Sq. Ft.) | Availability Rate (%) | Vacancy Rate (%) | User Sales (Sq. Ft.) | Leasing Activity (Sq. Ft.) | Net Absorption YTD (Sq. Ft.) | Under Construction (Sq. Ft.) | Average Net Asking Lease Range (\$/Sq. Ft./Yr) |
|------------------------------------|----------------------------------|-----------------------|------------------|----------------------|----------------------------|------------------------------|------------------------------|--|
| N DuPage County (6) | 43,199,479 | 5.1 | 3.0 | 442,867 | 1,528,526 | 1,482,133 | 183,296 | 5.50 to 6.50 |
| O'Hare (7) | 109,557,247 | 4.4 | 2.2 | 1,128,454 | 2,317,936 | -1,701 | 844,230 | 4.00 to 8.25 |
| Chicago Metro Area Subtotal | 1,170,241,970 | 5.3 | 3.5 | 12,068,115 | 26,032,532 | 15,287,281 | 11,432,666 | 5.01 |

FIGURE 3.12
STUDY AREA MARKET CONDITIONS, 2018 Q3

Source: CBRE Research, 2018 Q3

Restaurants

In addition to sales and unit growth, there are broader industry trends, reflecting new customer, or guest, behaviors, and transforming operations. These broader market trends include the three highlighted below. These trends point to future study area hospitality for a food truck park and highlight the importance of capitalizing on superior access by accommodating food delivery.

Off-Premises Sales: Off-premises sales was cited as the most important 2018 trend for full-service restaurants. Online orders represent about 43% of all food deliveries. Typical of ordering and delivery options for established restaurant locations is Grubhub’s, which illustrates the accelerating growth with the number of diners who’ve purchased on its platform in the past 12 months up 67% in the third quarter. The expansion of off-premises options reflects ongoing growth in curbside pick-up, drive-thru’s, catering, and delivery for restaurants of all formats.

Emerging Restaurant Formats: New competitors for traditional restaurants, regardless of format, continue to emerge. The rise of grocerants, grocers serving food and drinks in a dedicated dining area within their store, provides flexibility for consumers and allows for selling higher margin products (foods prepared on-site and wine, beer, or cocktails). Movie grills allow moviegoers to have dinner and drinks at the movie theater, again providing consumer flexibility while attracting larger audiences. In addition, many limited service, fast casual restaurants are morphing throughout the day--starting as out coffee shops in the morning, serving lunch, and ending up as wine or whiskey bars, typically with a small food menu.



Food Trucks: Food trucks test markets, and many establish themselves in places where markets were uncertain. With start-up costs ranging from a few thousand dollars for a leased truck to low six figures for an elaborate, customized mobile kitchen, there were 4,046 food trucks in the U.S. in 2017, nearly twice the number of 2008. But projected annual revenue growth is 3% from 2017 to 2022, compared to 7.3% from 2012 to 2017, when revenue totaled nearly \$1 billion. Food Truck and operators leverage social media to connect with customers beyond simply noting their location.



Office

Office properties are typically divided into three main categories: Class A, Class B and Class C. While there aren't any all-encompassing rules to these classifications, they are typically based on quality factors such as building age, amenities, and aesthetics.

- **Class A buildings** are generally either new developments or properties that have undergone significant improvements and renovations in recent years. The building's common areas will have high-quality finishes and amenities such as covered parking, fitness centers, leisure areas, on-site mailing office and restaurants or cafeterias.
- **Class B buildings** can be found in major commercial areas but are more commonly found in the suburbs. Age is a common factor contributing to a building being considered Class B, as it is usually older than their Class A counterparts. Oftentimes, a Class B office building was originally Class A but has been downgraded due to age and deterioration. These properties typically have good amenities, management companies, and tenants, and they can even be brought up to Class A standards with common area renovations and amenity upgrades.
- **Class C properties** are typically very dated, with minimal amenities and located in less desirable places. These properties are sometimes slow to lease even though they are less expensive than Classes A and B. Class C offices can also appeal to small, start-up tenants as such a property's lower rents allow tenants to allocate more financial resources towards growth.

The Chicago suburban office market is organized by region, and the study area is composed of a portion of the O'Hare region, north of 290, and the East West Tollway region, south of 290. The table in Figure 3.13 reports the study area market conditions at the end of the third quarter 2018.

For 10 years, there has been little new suburban office built as companies moved to the Loop in search of young technology savvy employees and the space needed per employee declined due to open offices and telecommuting. As Figure 3.13 illustrates there currently is no office space under construction in either market. Office development is a weak opportunity that will be driven by special considerations such as a company owner wanting to locate closer to a distribution or manufacturing business.

| Submarket | Rentable Building Area (Sq. Ft.) | Direct Vacant (Sq. Ft.) | Direct Vacancy Rate (%) | Sublease Vacancy Rate (%) | Total Vacancy Rate (%)* | Q3 2018 Net Absorption (Sq. Ft.) | 2018 Net Absorption (Sq. Ft.) | Under Construction (Sq. Ft.) | Gross Asking Lease Rates (\$/Sq. Ft./Yr) |
|--------------------------|----------------------------------|-------------------------|-------------------------|---------------------------|-------------------------|----------------------------------|-------------------------------|------------------------------|--|
| East-West Tollway | 39,262,218 | 6,311,025 | 16.1 | 1.7 | 17.8 | (75,257) | 169,914 | - | 23.26 |
| Class A | 12,272,961 | 1,535,748 | 12.5 | 1.7 | 14.2 | (61,174) | 108,890 | - | 28.79 |
| Class B | 19,107,524 | 3,412,074 | 17.9 | 2.0 | 19.8 | (107,225) | (40,029) | - | 22.59 |
| Class C | 7,881,733 | 1,363,203 | 17.3 | 1.0 | 18.3 | 93,142 | 101,053 | - | 17.26 |
| O'Hare | 13,151,169 | 1,905,632 | 14.5 | 0.4 | 14.9 | 8,610 | 41,695 | - | 27.04 |
| Class A | 7,085,712 | 719,430 | 10.2 | 0.5 | 10.7 | (11,312) | (44,899) | - | 33.69 |
| Class B | 3,307,565 | 728,366 | 22.0 | 0.2 | 22.2 | 8,960 | 53,845 | - | 23.03 |
| Class C | 2,757,892 | 457,836 | 16.6 | 0.3 | 16.9 | 10,962 | 32,749 | - | 17.21 |

FIGURE 3.13
STUDY AREA MARKET CONDITIONS, 2018 Q3

Source: CBRE Research, 2018 Q3

Residential

As reported in the Planning Issues and Opportunities section, residential uses are an important component of study area land use, with single-family homes being the most common residential type. Although adding more single family residential in the area would continue this historical pattern, it also continues the conflicts with the commercial uses and fails to provide denser residential that better capitalizes on the important role Route 83 plays as a regional connector.

Redevelopment in these single-family neighborhoods is complicated because traditional redevelopment projects, commercial, industrial and multi-family residential, require assembly of numerous owners' adjacent properties. An alternative is to encourage density by allowing an innovative housing product that is emerging: Missing Middle Housing. Missing Middle Housing consists of multi-unit housing types such as duplexes, fourplexes, bungalow courts, and mansion apartments that are not bigger than a large house and therefore can be redevelopment of a single-family lot. The term was coined by architect and urban planner Daniel Parolek, Principal and Founder of Opticos Design, Inc., to describe a common feature of pre-1950 neighborhoods that was "missing" in later suburbanization, such as, the study area neighborhoods. When missing middle products are added to neighborhoods with primarily single-family homes, they provide diverse housing choices and, can generate density to support pedestrian amenities, transit and locally-serving commercial businesses. They encourage redevelopment by adding value through income producing rental units and fit with a multi-generational living trend. The smaller units also offer starter housing for newly formed families.

MISSING MIDDLE TYPE:

Duplex "Idealized," two units



Idealized Duplex • Opticos Design

Units/acre, 15.5 • Lot size, 5,625 sf



Summary

The study area is a large and diverse collection of land uses that developed in a regional economy that differed greatly from today's e-commerce and inland port dominated environment. The study area communities have many choices. Although it is important to be flexible in this economy, which is being transformed by business and life style changes, there are opportunities to collaborate and guide new uses in a manner that enhances the region.

As this project advances, it will examine uses on specific parcels to create a collective vision for use transitions. Policy questions to consider include:

1. Can the value of manufacturing, distribution, and office properties be enhanced by providing nearby worker housing that solves today's employee challenge?
2. How can the changes in truck traffic and amenities driven by e-commerce be accommodated in the study area?
3. Which existing properties may be appropriate for redevelopment?

