

Preliminary Survey Results Regarding 5th Avenue Development Land Use and Building Height Options

Surveys with Engaged Residents, Commuters,
Community-Wide Residents, and Opt-In Respondents

June 19, 2018
aQity Research & Insights
Evanston, IL



Naperville



Surveys and Respondent Information

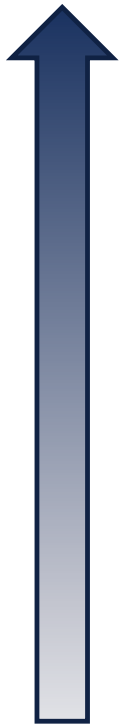
- Findings are based on responses across four surveys. Final sample sizes include:
 - **n=300 Engaged Residents** (from City's and/or Ryan's de-duped databases; 24.8% response rate);
 - **n=406 Commuters** (from City's Commuter database; 10.4% response rate);
 - **n=84 Naperville-Wide Residents** (randomly sampled from all Naperville households; 2.0% response rate);
 - **n=646 Opt-In Web Survey Respondents** (via web survey link on 5th Ave. Development website; multiple survey input possible).

- Initial results reported for these four groups, plus a **Crossover segment of n=91 who appear on both the Engaged and Commuter** contact lists (15% response).

- Dates of data collection: March 13 to May 12, 2018.

Top Priorities for 5th Avenue Land Use Options

Most
Interest



Some
Interest

- Ample/Additional Parking (all segments, not just commuters)
 - Strongest support multi-level parking; less support for street parking

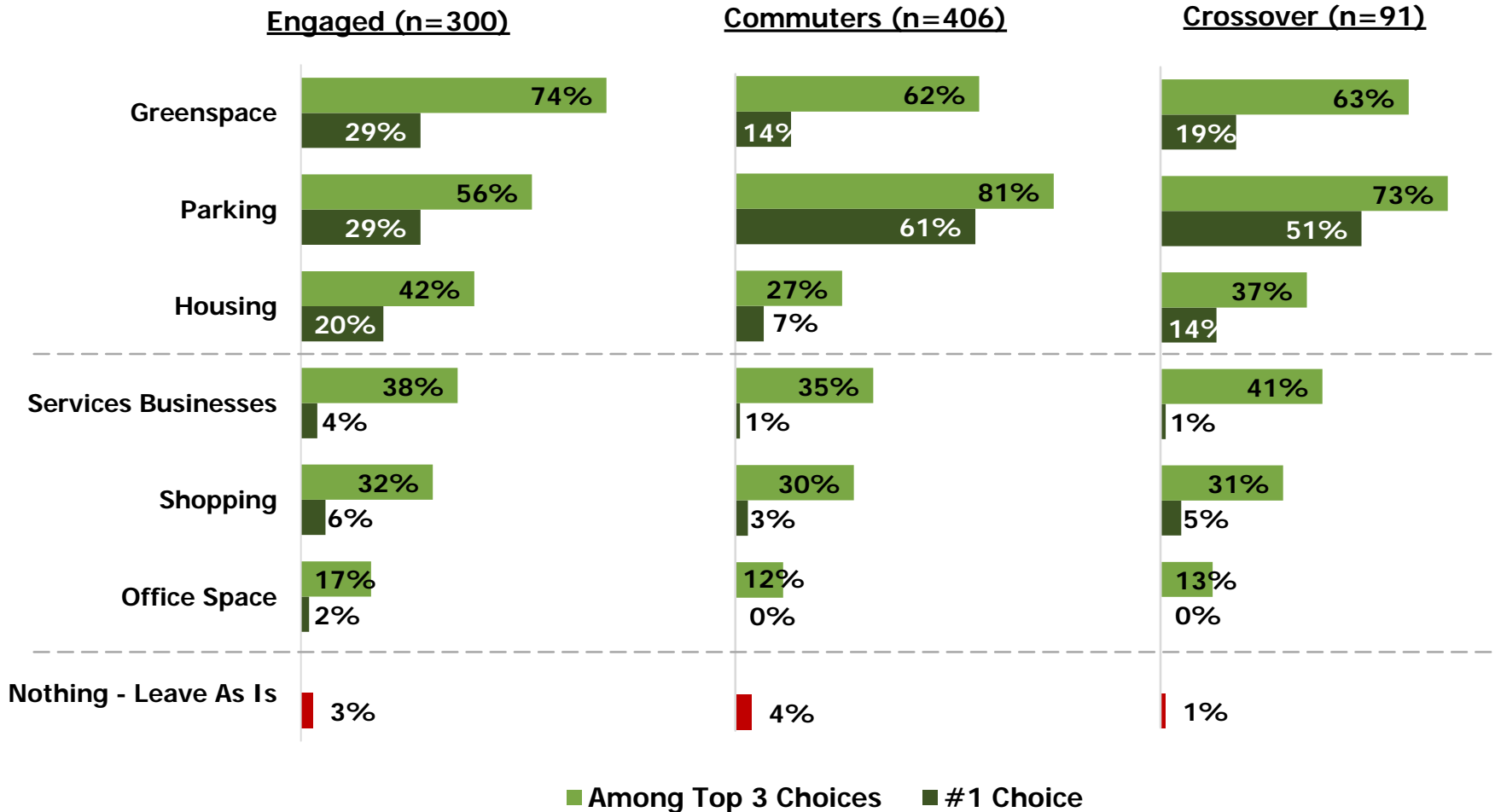
- Public Greenspace (grassy areas, gardens, benches/plaza)
 - Walking/Biking paths (pedestrian safety, connectivity)
 - Allow for community events (farmers markets, fairs/festivals)

- Housing (especially condos and townhomes, then single residency)
 - Mostly market-priced housing
 - Some support for senior and/or attainable housing

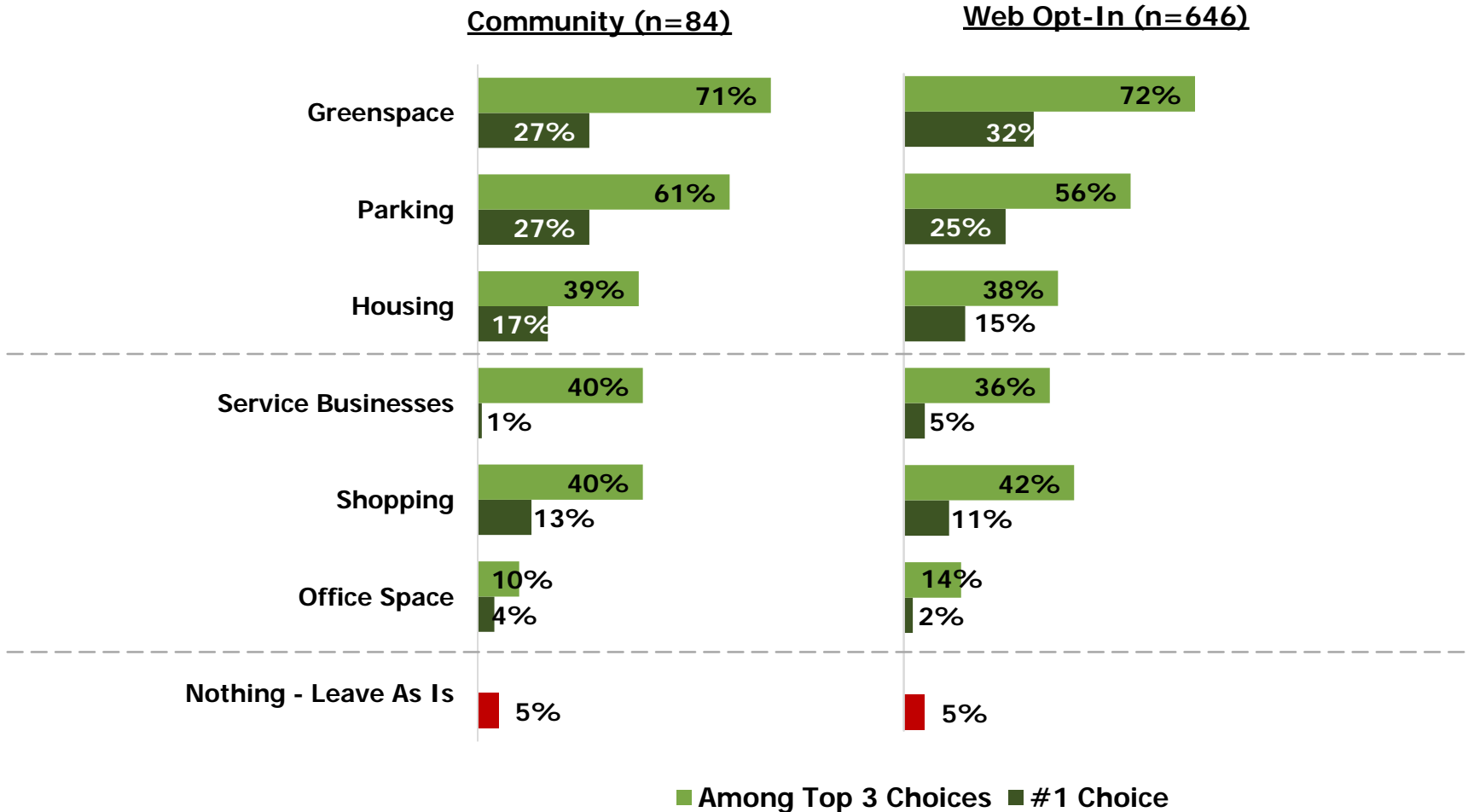
- Retail/Shopping
 - Dining/beverage establishments, small grocery, services
 - Less support for boutique shopping, performance theatre

- Office space
 - Roughly half are interested

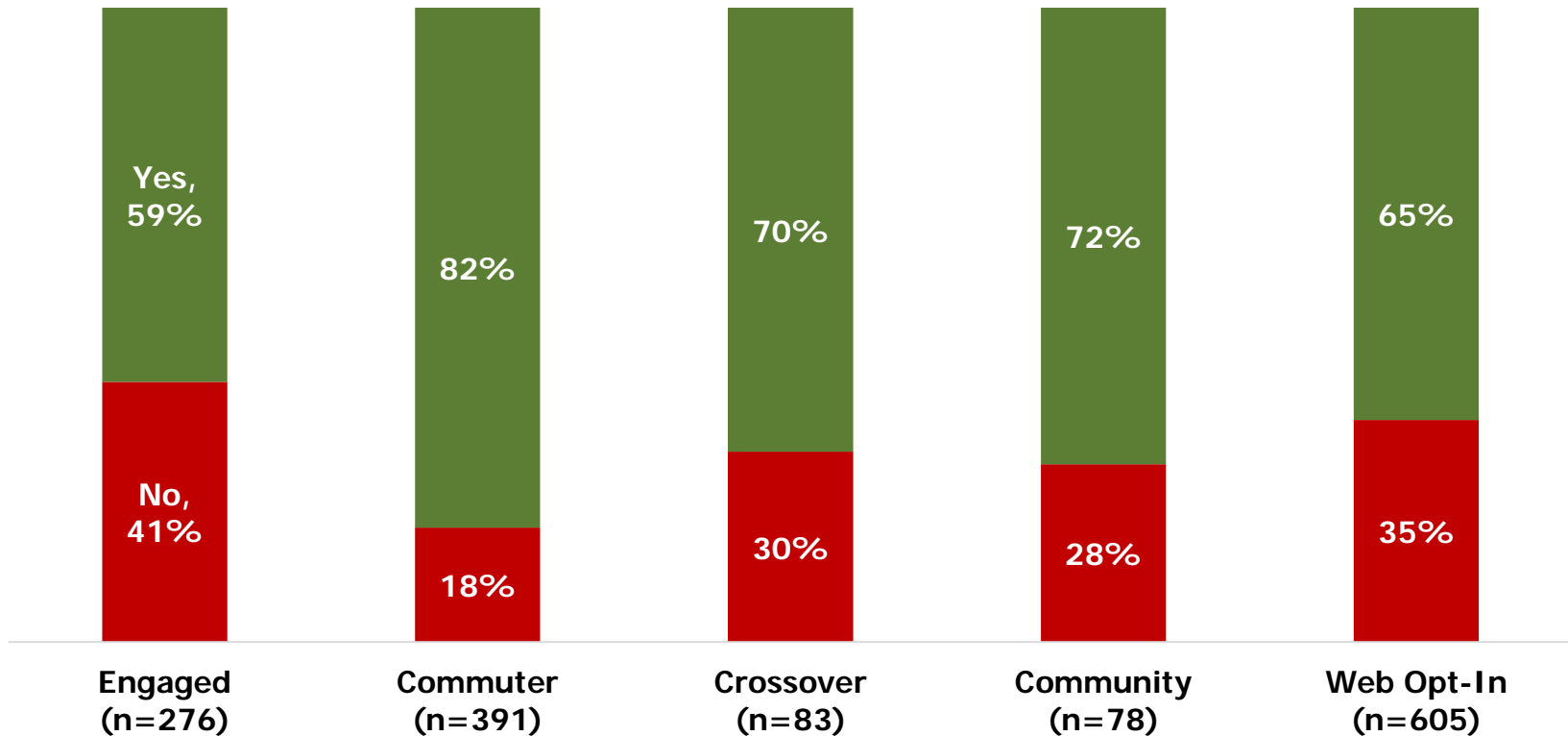
Top Preferred Land Uses for 5th Ave. Development



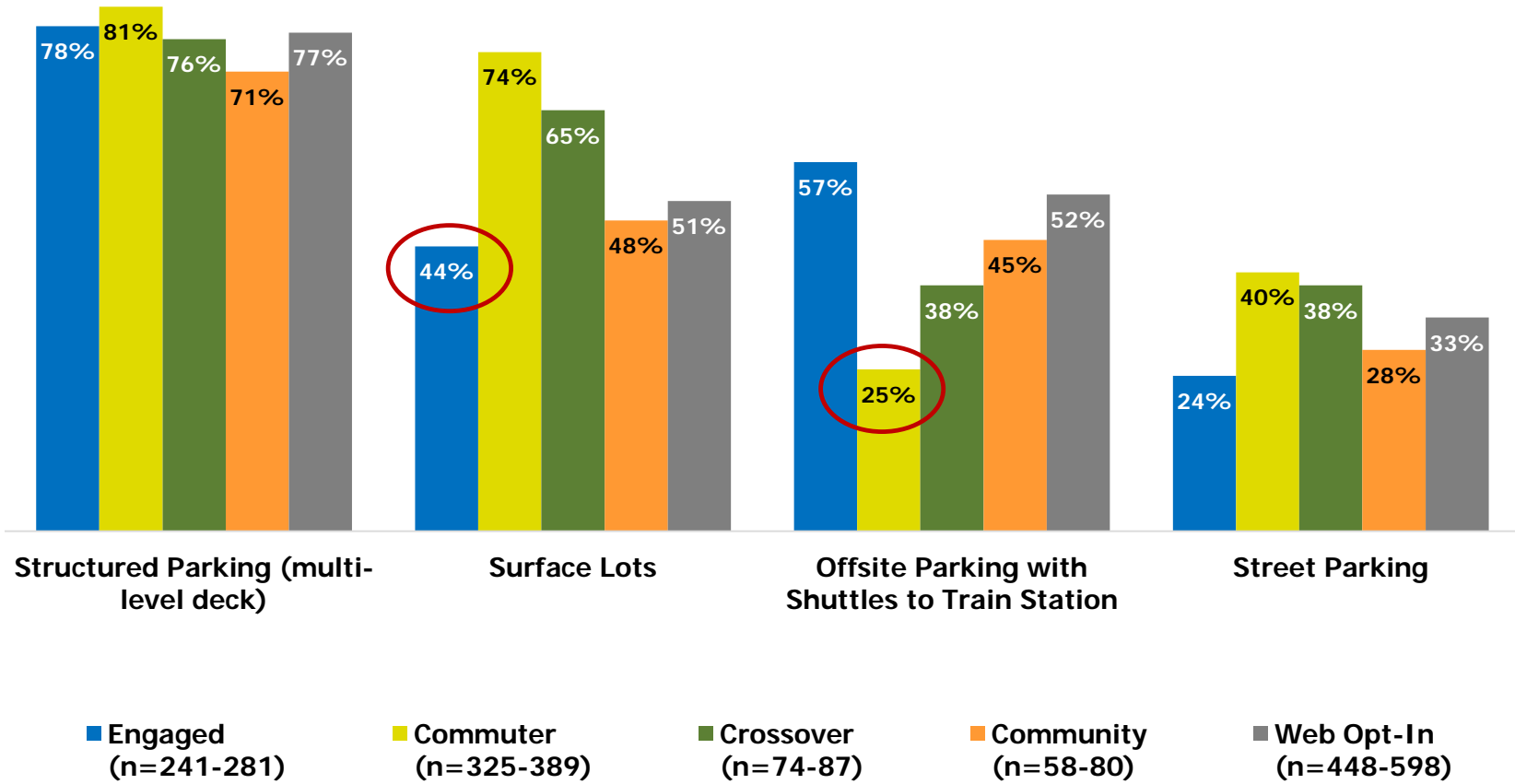
Top Preferred Land Uses for 5th Ave. Development (cont'd)



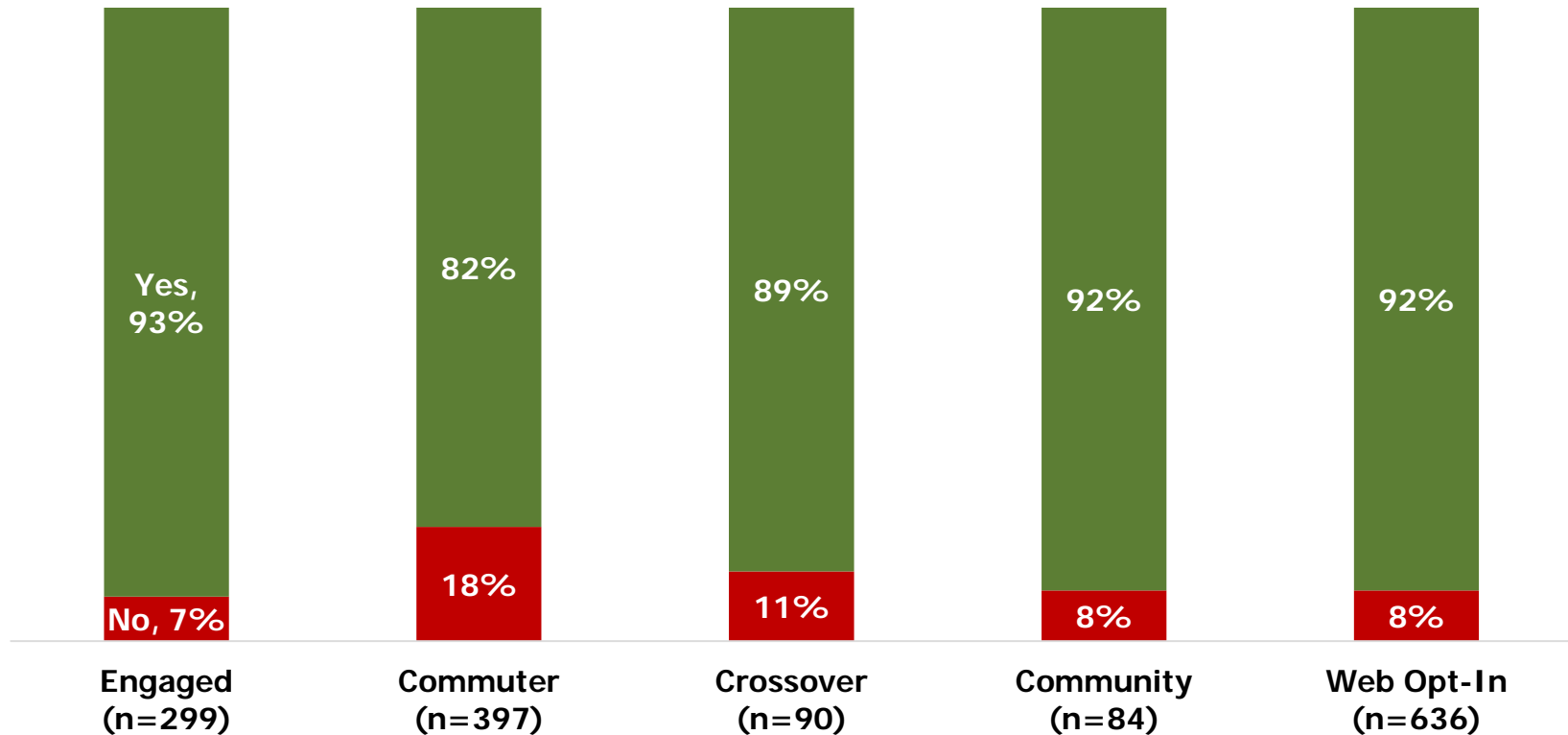
Should Parking Be Part of 5th Ave. Development?



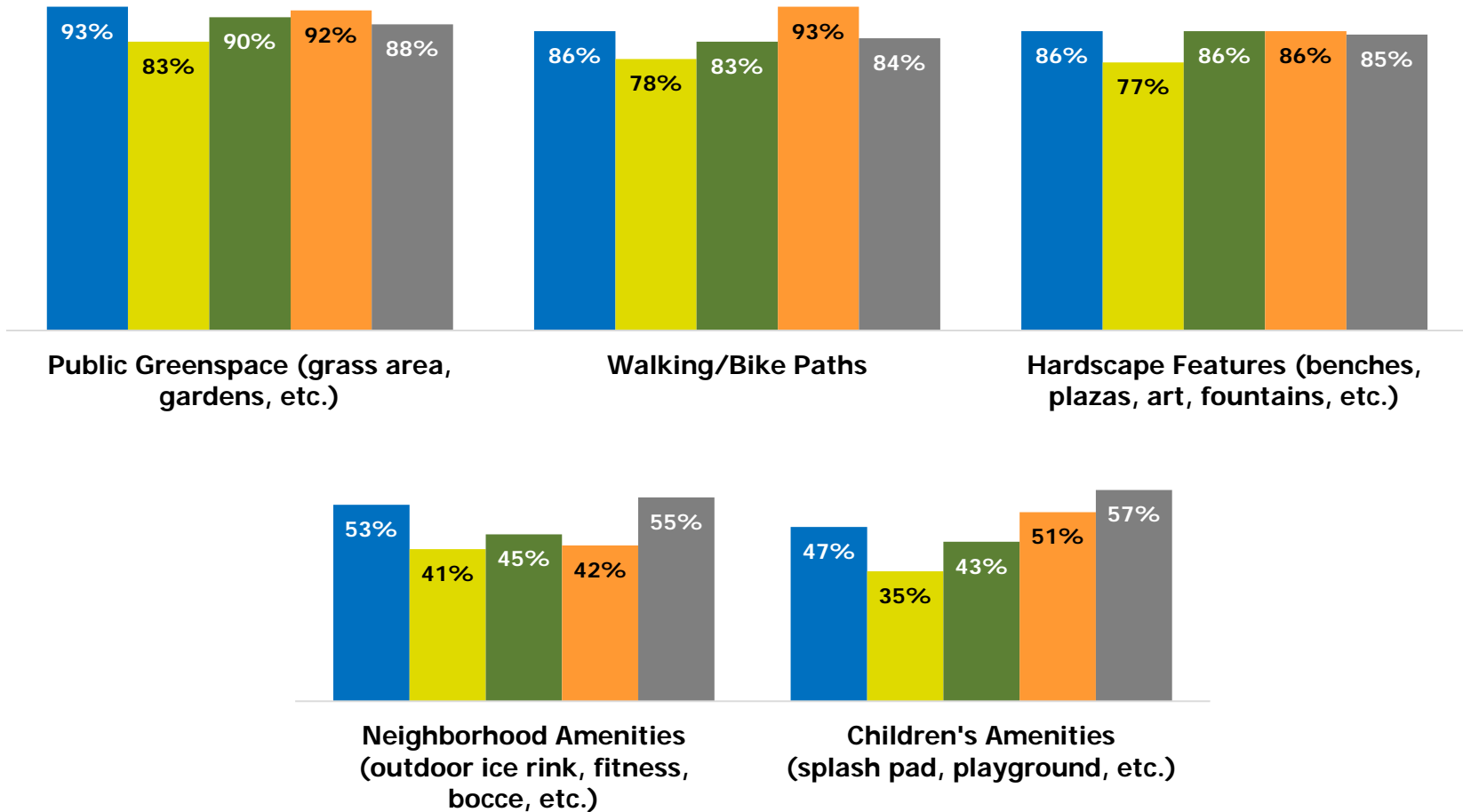
% Support Types of Parking (top 2 box on 5-point scale)



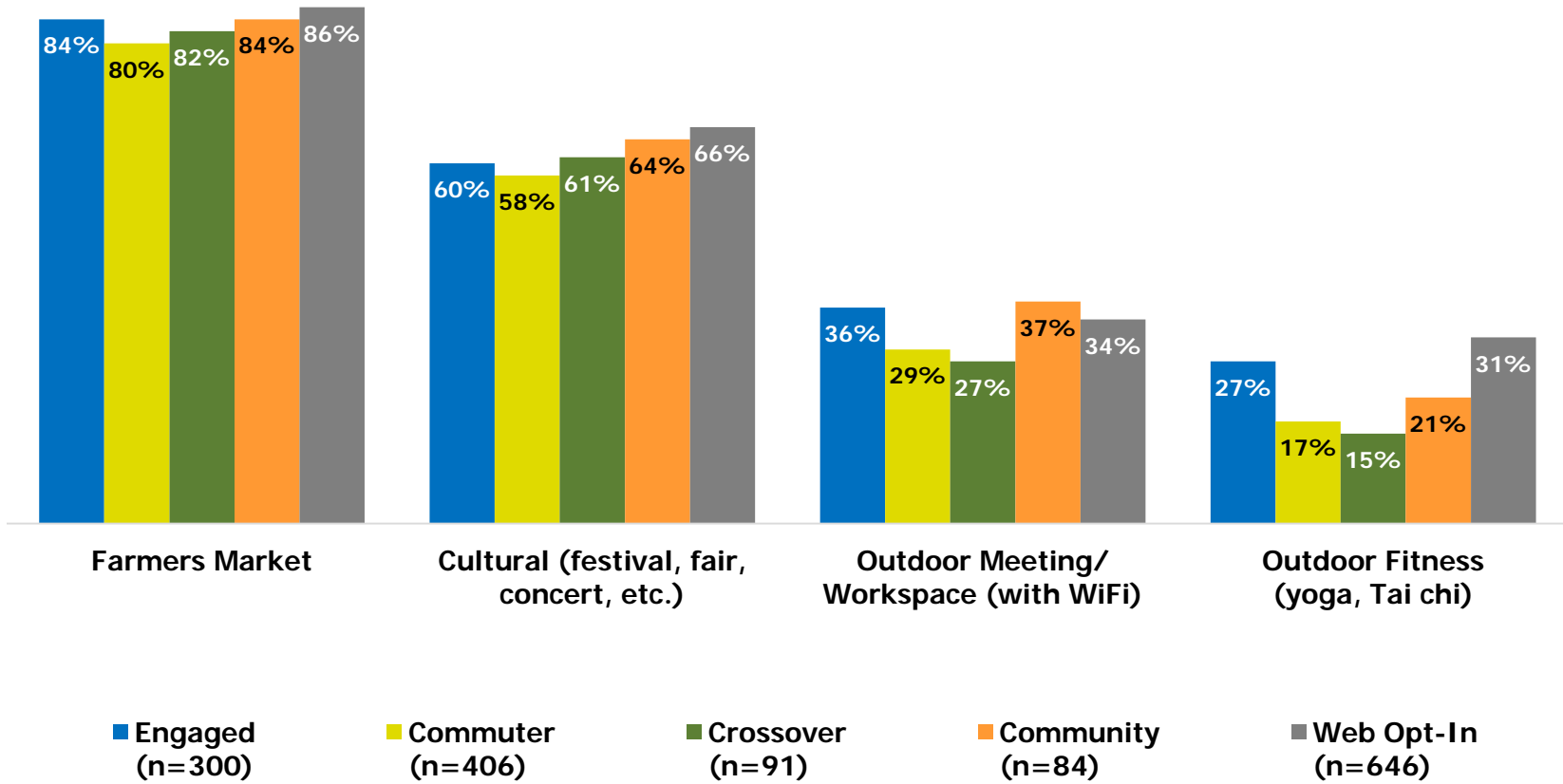
Should Greenspace Be Part of 5th Ave. Development?



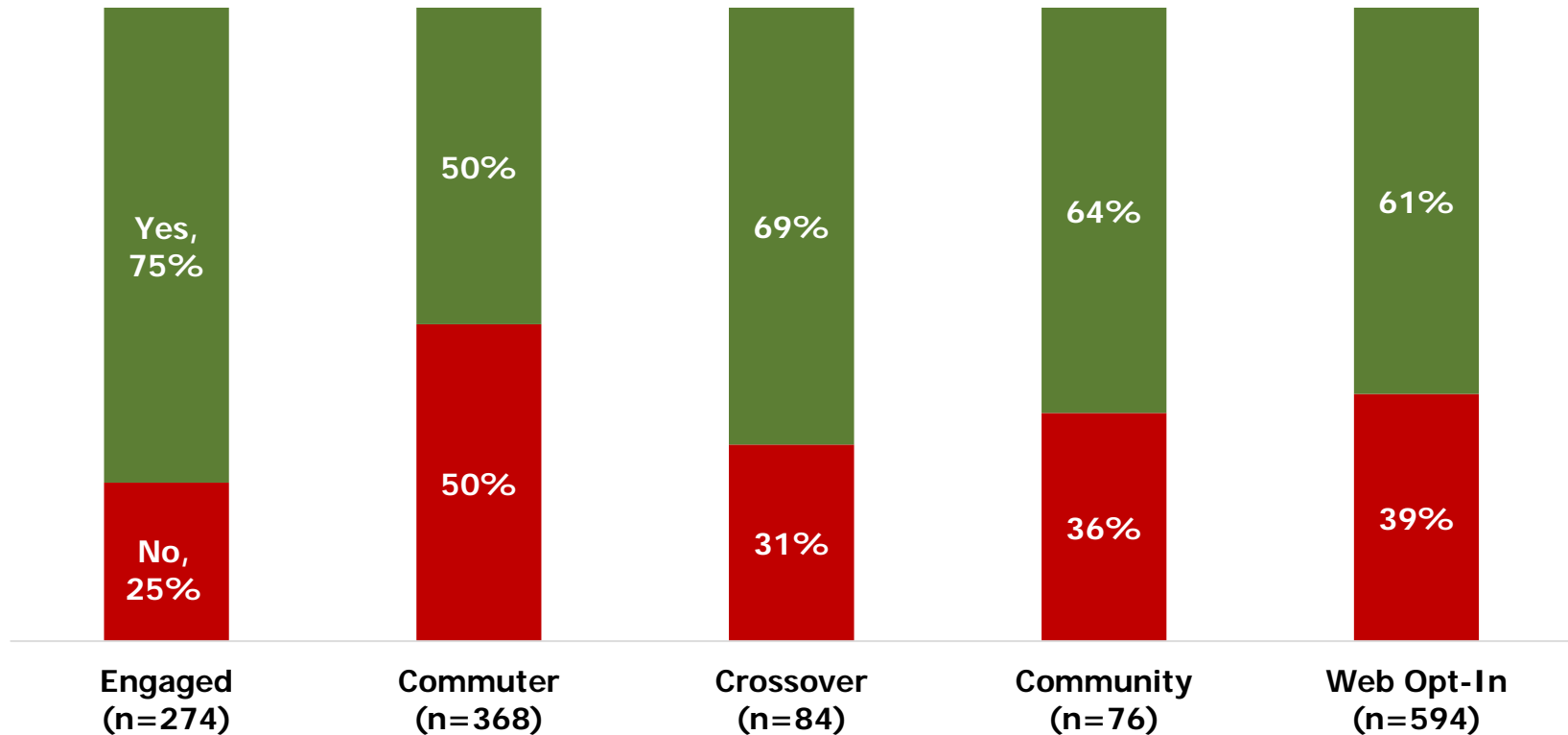
% Support Types of Greenspace (top 2 box on 5-point scale)



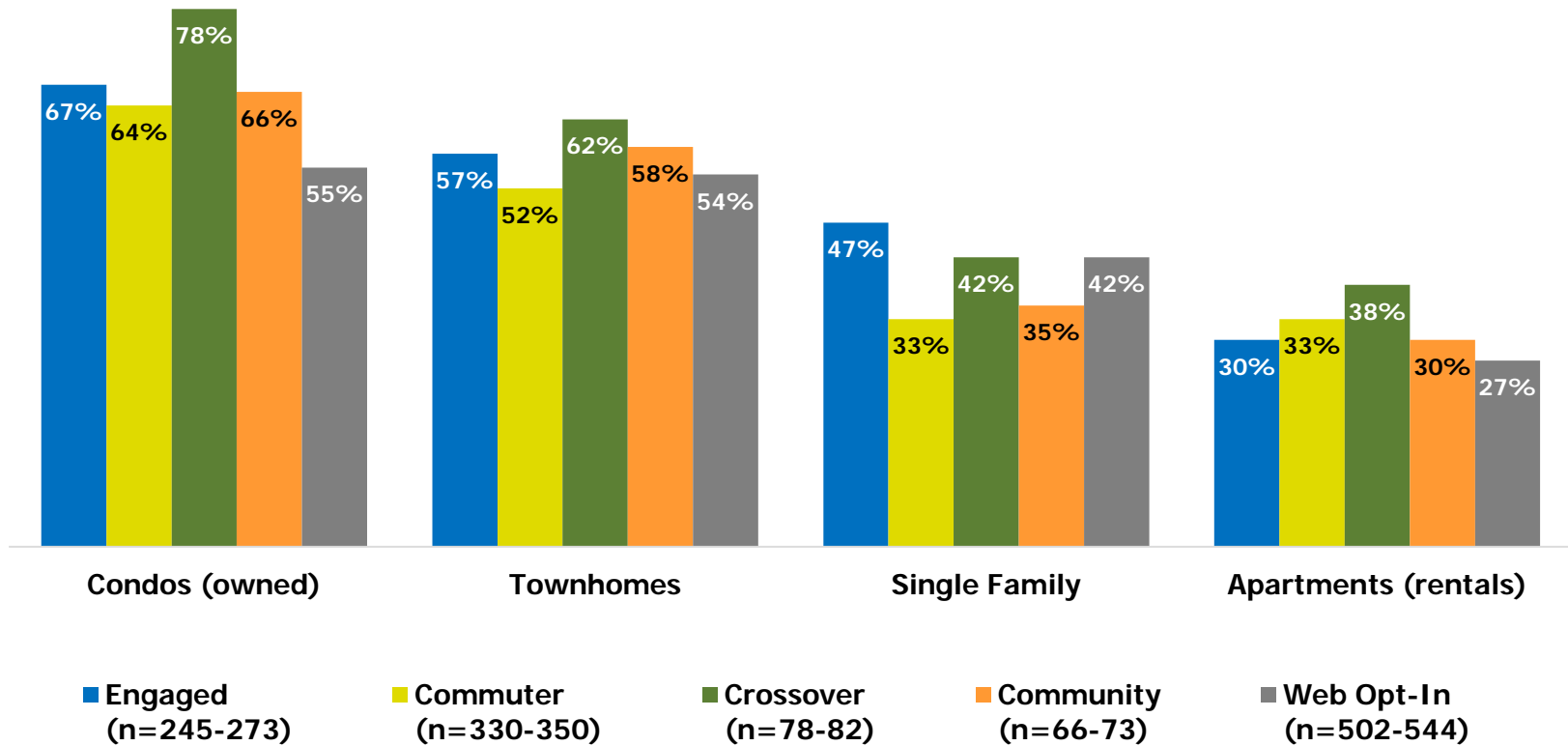
% Support Other Types of Greenspace Amenities/Activities (top 2 box on 5-point scale)



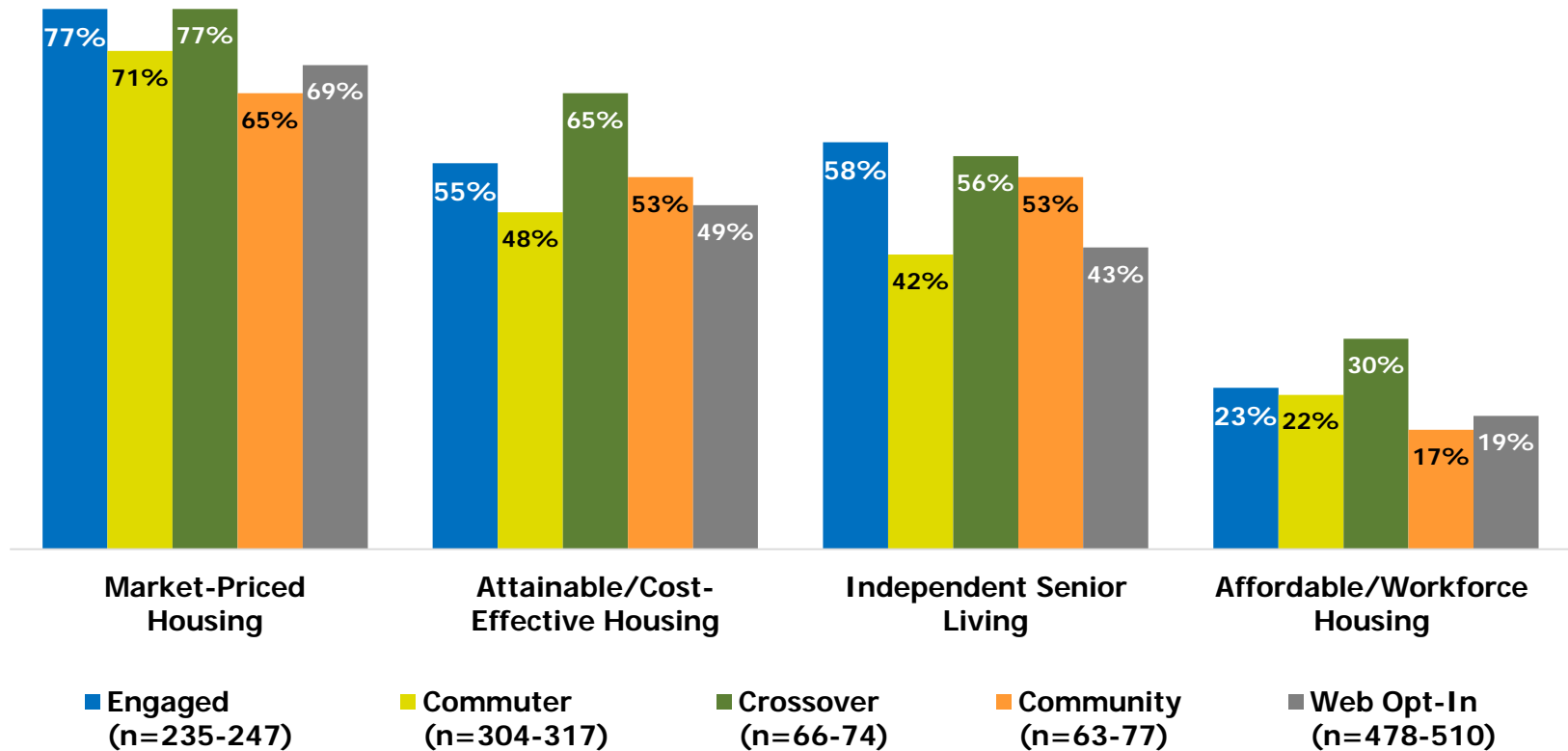
Should Housing Be Part of 5th Ave. Development?



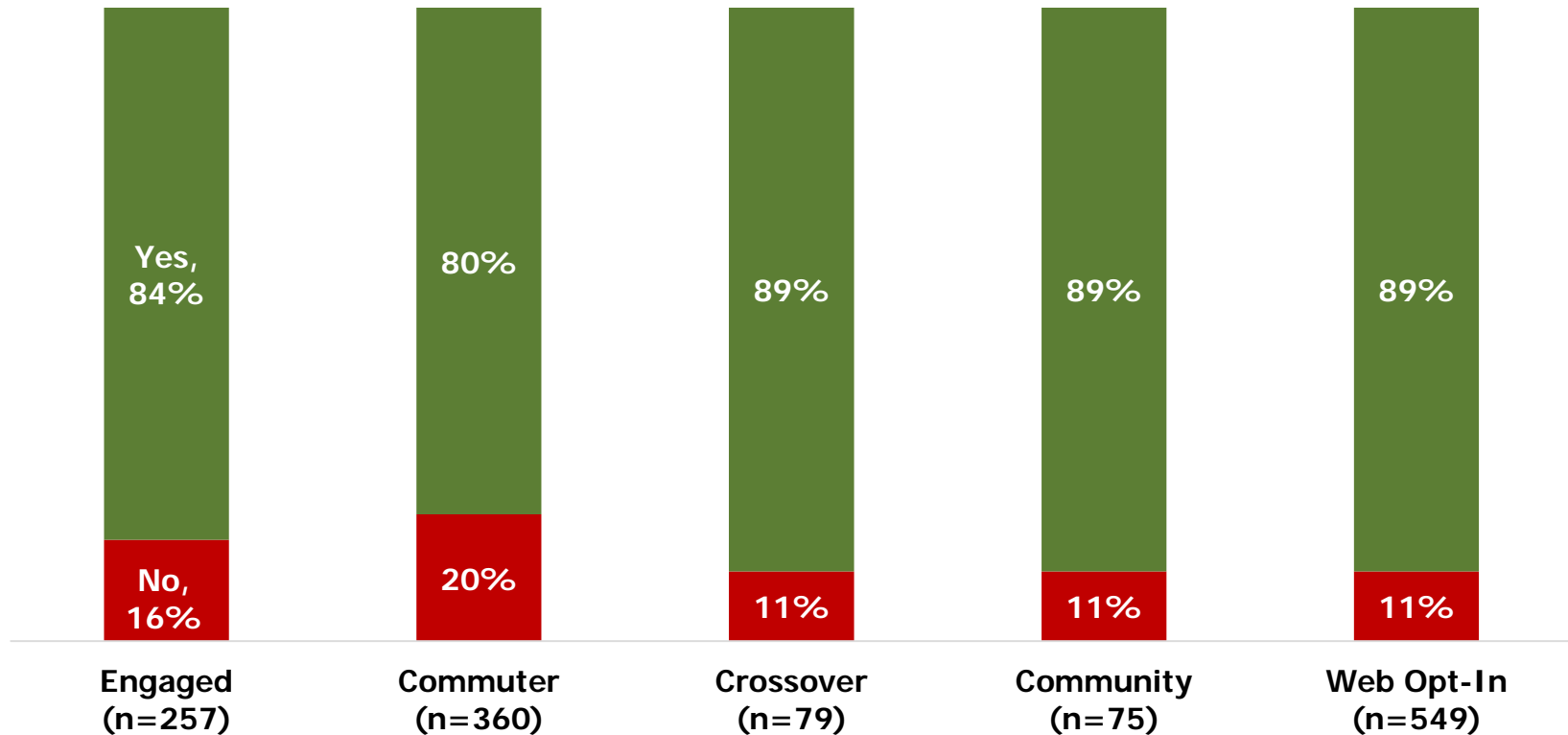
% Support Types of Housing at 5th Ave. Development (top 2 box % on 5-point scale)



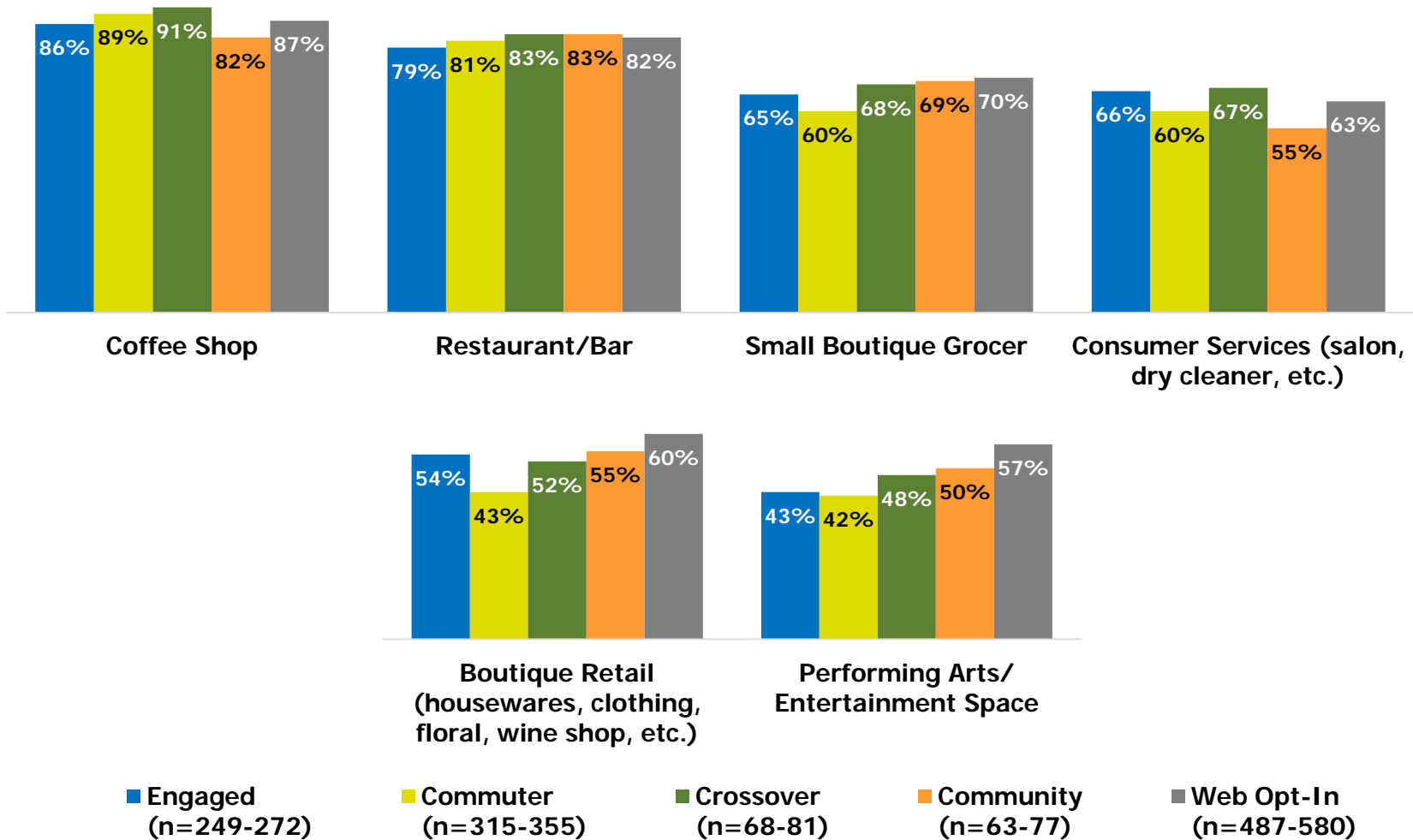
% Support Types of Housing Markets at 5th Ave. Development (top 2 box % on 5-point scale)



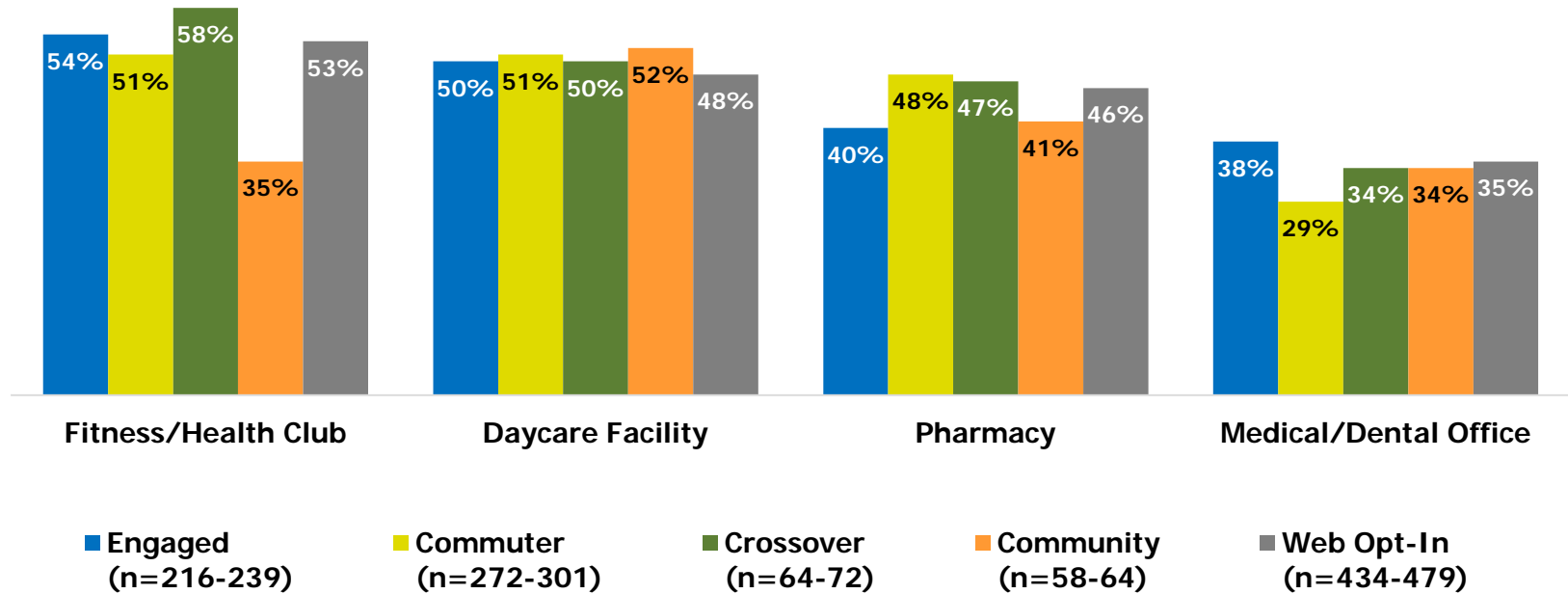
Should Shopping/Service-Oriented Businesses Be Part of 5th Ave. Development?



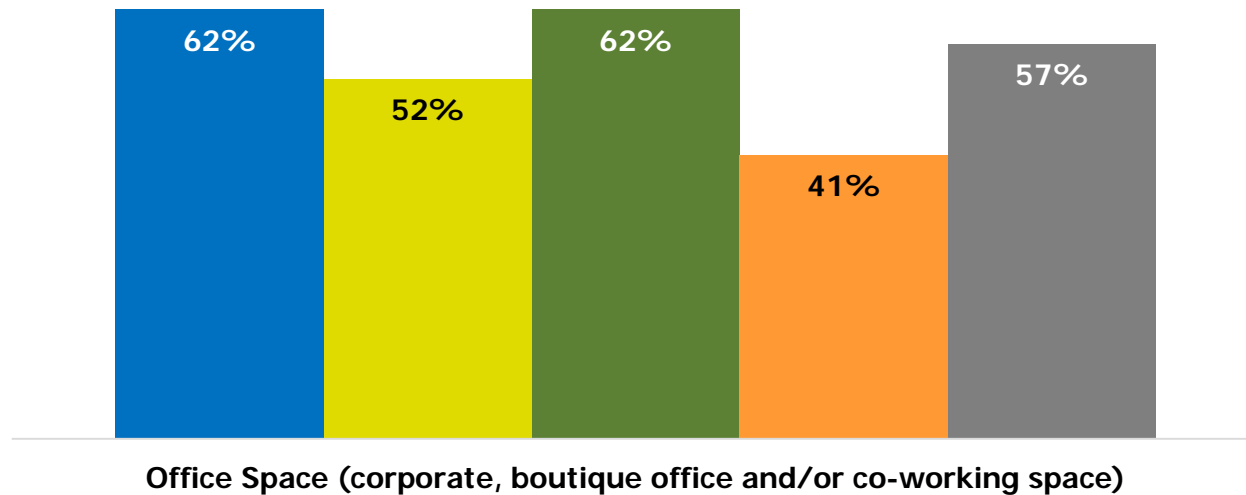
% Support Types of Shopping/Service Businesses (top 2 box on 5-point scale)



% Support Types of Community-Oriented Businesses at 5th Ave. Development (top 2 box % on 5-point scale)



% Support Office Space at 5th Ave. Development (top 2 box % on 5-point scale)



■ Engaged
(n=255)

■ Commuter
(n=311)

■ Crossover
(n=77)

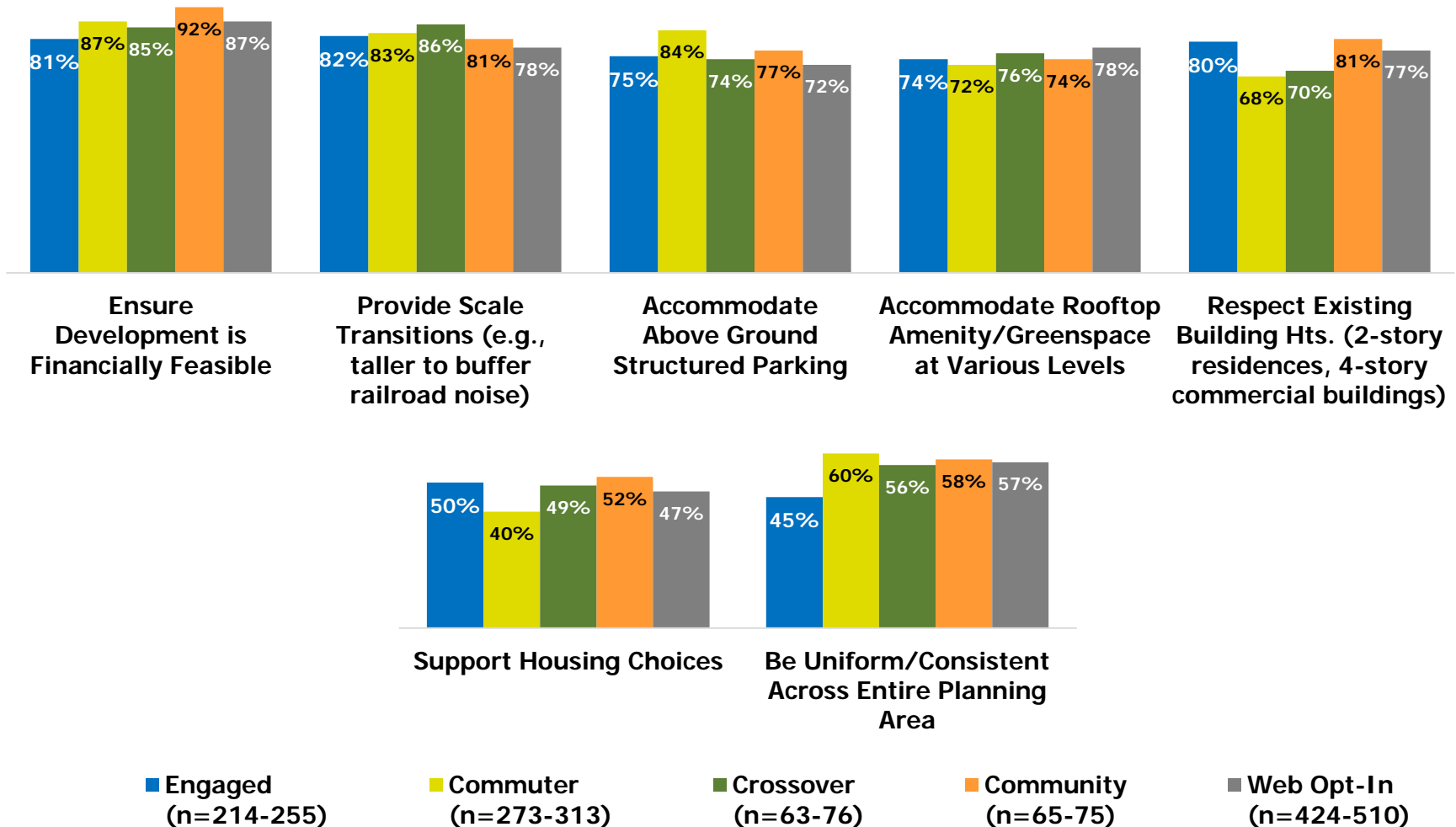
■ Community
(n=70)

■ Web Opt-In
(n=496)

Maximum Acceptable Height Questions: Key Objectives

- **To generally inform the discussion and the process at this early stage**, as other critical elements are being discussed/evaluated (land use, market feasibility options, infrastructure needs, traffic and safety, etc.).
- Question focused on “**maximum acceptable height**” for key lots in the 5th Avenue development.
 - Asking “What building heights would you like to see” is a different question.
 - If a financially feasible project (which is important to 81%+) requires taller buildings, need to know in general terms “how tall” and “where” such structures are most/least acceptable.
- This approach recognizes and incorporates both views:
 - Those opposing anything taller than 2 stories could respond accordingly;
 - Likewise, those preferring limits at 2 stories but willing to accept something taller in some locations could respond.

% Support for Accommodating Higher/Lower Building Heights (top 2 box % on 5-point scale)



Maximum Acceptable Building Heights: Summary

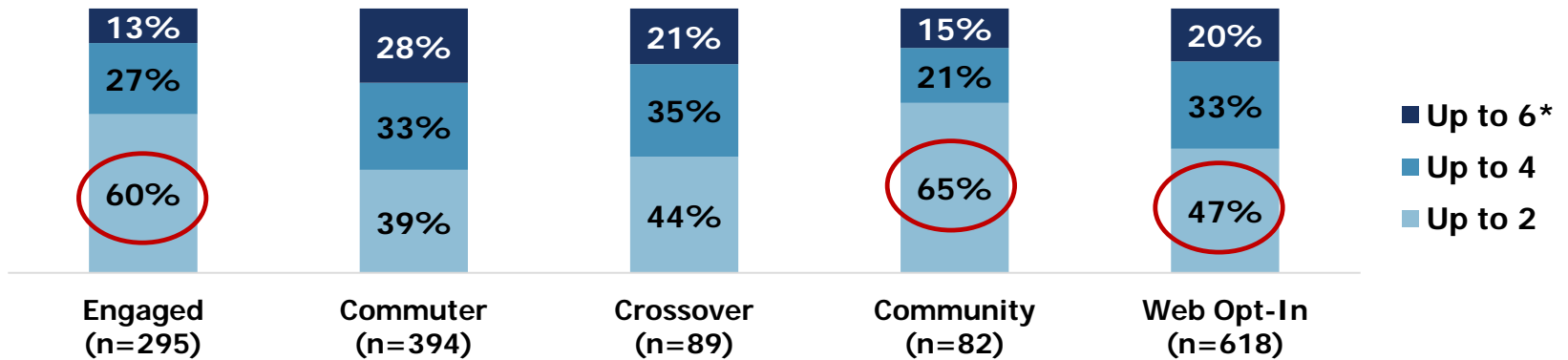
- Across the properties shown, most respondents accept up to 4-story buildings in 5th Ave. area.
 - Lower heights are favored at the Kroehler (#1 – up to 2 stories) and Boecker (#3) lots.



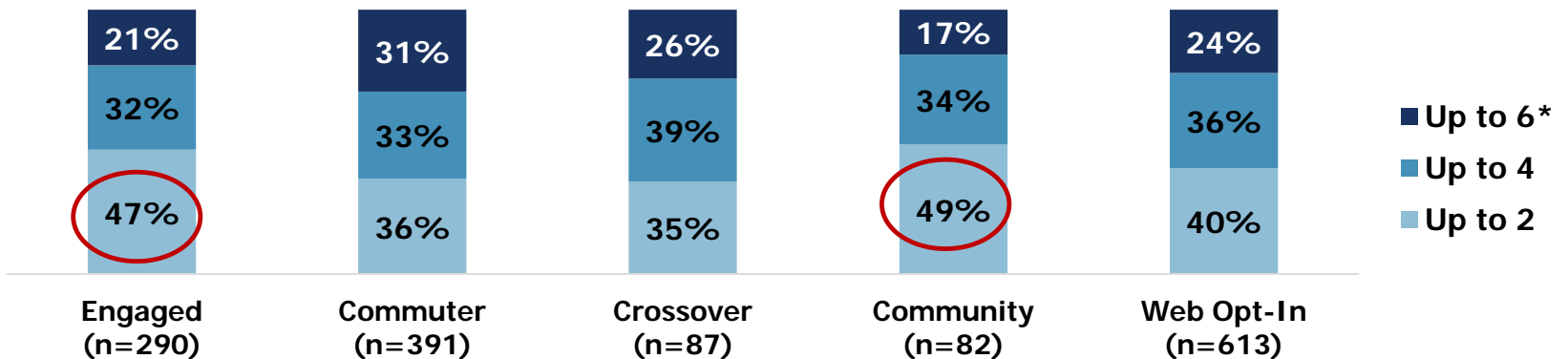
- While a plurality support 4-stories at Water Tower (#2) and Burlington (#4) sites, there is a fair amount of support for 4- to 6-story structures at these locations (more so than under 2-stories).

Acceptable Building Heights: Lower Levels for Lots 1 & 3 (majorities at 2-4 stories)

Lot 1: Kroehler Lot



Lot 3: Boecker Lot

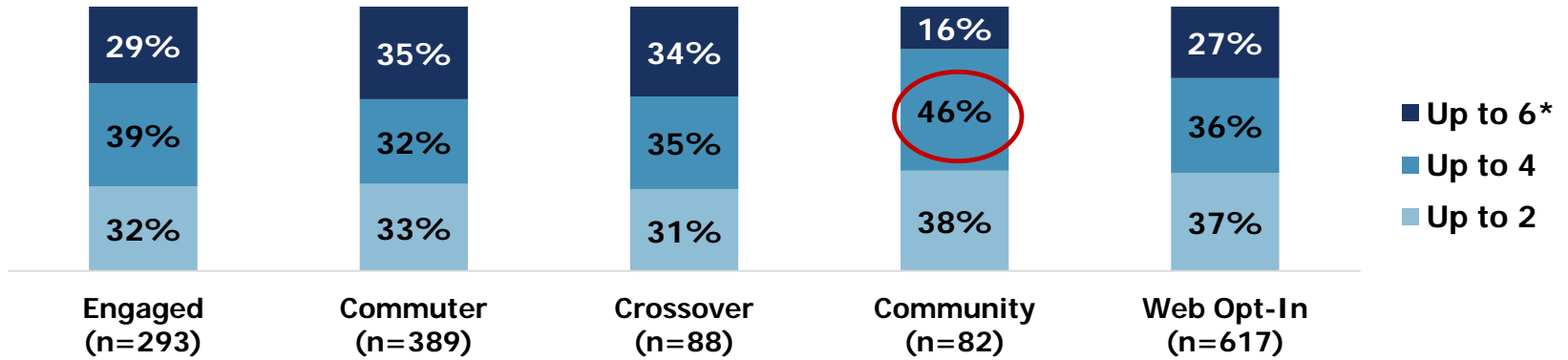


Acceptable Building Height Increases With Proximity to BNSF Tracks

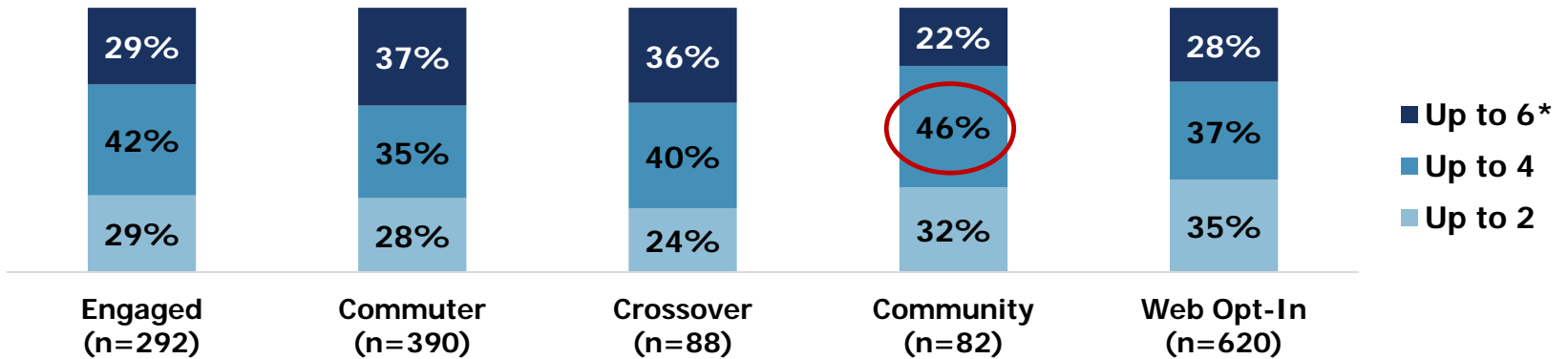


Acceptable Building Heights: Roughly 4 Stories for Lots 5 & 6

Lot 5: Parkview



Lot 6: Children's Museum

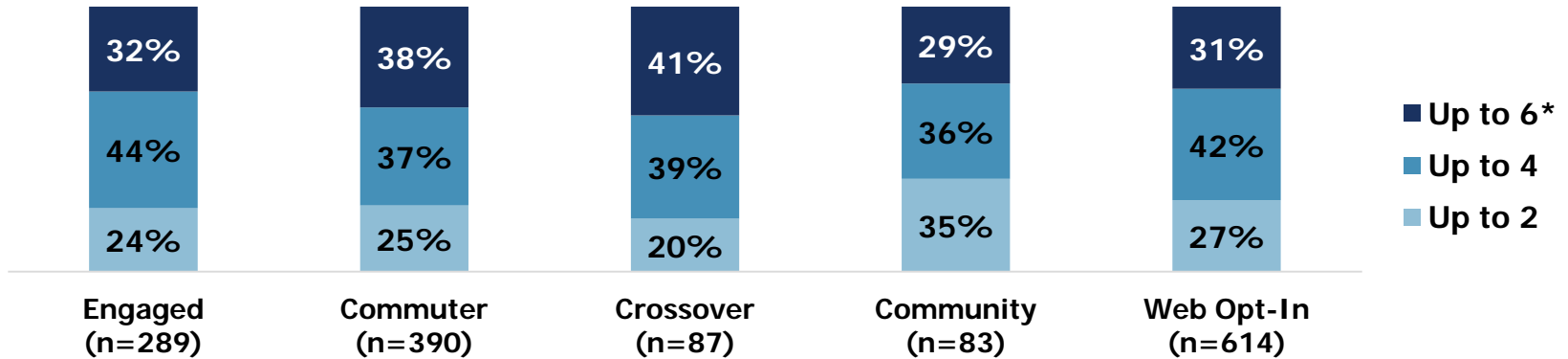


Acceptable Building Height Increases With Proximity to BNSF Tracks

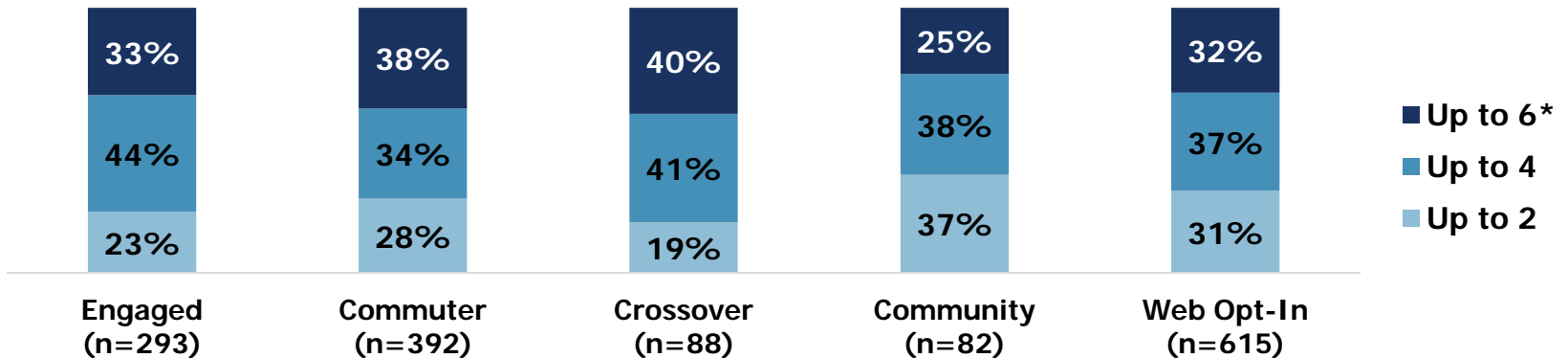


Acceptable Building Heights: Roughly 4 Stories for Lots 2 & 4, With Some Amenability Up to 6 Stories

Lot 2: Water Tower Lot



Lot 4: Burlington Lot



Acceptable Building Height Increases With Proximity to BNSF Tracks



Other Insights and Next Steps

- Regardless of preferred land use options, many volunteered the need to ensure smooth traffic flow (reduced congestion) and pedestrian safety in the area.
 - Roughly 3% to 5% want the area to remain as-is (no development).

- Data processing and analysis, along with final reporting, is underway.
 - Includes meaningful demographic differences (e.g., by neighborhood, age, gender, etc.) within Engaged and Commuter segments;
 - Final report will include detailed findings and executive summary, with in-person presentation.

- First draft of final report expected in third week of June.