

# Glasgow Avenue Planning Study Existing Conditions, Opportunities and Constraints Analysis April 29, 2015 (Updated 8/31/2017)

### Introduction

Glasgow Avenue is a primarily auto-oriented corridor offering a wide variety of land uses, including shopping, medical services, a school, parks, and single family residential neighborhoods. The US 40 Corridor 20-Year Transportation Plan calls for a future "Main Street" on Glasgow Avenue, which will ultimately require a reconfiguration of the street design and adjacent development patterns. The intent of the Glasgow Avenue Planning Study is to work with community members and other stakeholders to establish a unified "Main Street" vision and create the design standards necessary for New Castle County and DelDOT to implement the vision over time.

### **Goals and Objectives**

Initial stakeholder interviews and the first public workshop resulted in clear direction for establishing goals and objectives to guide this vision plan:

## 1. Complete Streets

- a. Design facilities for people to conveniently and safely drive, walk, bike, and use transit
- b. Manage speed with lanes that are not excessively wide and with vertical elements such as street trees and buildings pulled up closer to the sidewalk
- c. Improve intersection conditions at Old County Road
- d. Provide convenient and accessible bus stops on Glasgow Avenue

## 2. Cohesive Character

- a. Create a unified visual identity through street design, landscape, signage, lighting and street furniture
- b. Define "gateways" at the Glasgow intersections with US 40 and SR 896
- c. Link the corridor to popular destinations and adjacent neighborhoods with a unified sidewalk and trail system
- d. Create design guidelines for the corridor to guide future development

### 3. Vibrant Main Street

- a. Provide a diversity of uses and activities
- b. Design a "complete street" for Glasgow that allows for safe and comfortable walking and biking
- c. Allow 2-3 story buildings fronting on Glasgow Avenue north of Cann Road
- d. Reduce the speed limit and enforce it more effectively



### 4. Holistic Community

- a. Create pedestrian and bicycle links to existing and planned regional trail facilities (e.g., US 40 multi-use path, path planned east of SR 896, etc.)
- b. Create pedestrian and bicycle connections between corridor amenities (e.g., sidewalks along the entire corridor, walkways within Peoples Plaza, pedestrian connections between the Little League fields and adjacent neighborhoods/shopping center, etc.)
- c. Provide family-friendly community amenities, such as parks, a library, etc.

### 5. Green Corridor

- a. Add trees and landscaping to the edges of the roadway and a median as appropriate
- b. Protect and enhance the existing environmentally sensitive areas
- c. Add ecologically sound stormwater management practices

The current diversity of uses on Glasgow Avenue is ideal for a "village center" or "Main Street" environment. In this case, however, the uses are configured such that it is difficult, if not dangerous, to walk or ride a bicycle. Figure 1 shows a generic set of land uses configured for automobile convenience (parking in the front of buildings, buildings spread apart and connected by wide streets that encourage speeding), and the same land uses configured for easy and safe walking access (parking behind buildings, buildings closer together to support narrow, pedestrian-friendly, slow-speed streets). Today, Glasgow Avenue's development patterns reflect the "less walkable" design option. Stakeholder-defined goals support the idea of transforming Glasgow Avenue to be consistent with the "more walkable" development pattern.





Figure 1: More Walkable versus Less Walkable Development Patterns

### **Existing Land Use**

Glasgow Avenue offers a wide variety of land uses, including shopping, medical services, a school, parks, and single family residential neighborhoods. Figure 2 presents the layout of current land uses on and around Glasgow Avenue. The north end of the corridor is dominated by commercial uses, including Peoples Plaza, a future Rite Aid drugstore, the Glasgow Medical Center, and Hodgson Vocational-Technical High School. Reybold Ventures Development Group holds approximately 30 acres of land at the intersection of Glasgow Avenue and US 40 on which they are proposing additional retail and office uses. The southern portion of the corridor primarily supports residential development and the ball fields for Hodgson High School. The New Castle Conservation Center is also located at the southern end of the corridor. Houses in the area generally date to the 1970's and sit on ¾-acre to one-acre single-family lots. Toward the middle of the corridor there is a childcare center and a newer, age 55+, single-family development with smaller lots than the older housing.





Figure 2: Existing Land Use





### **Existing Urban Design Patterns**

Once the primary through corridor for the area, Glasgow Avenue has now been bypassed by SR 896. However, Glasgow's roadway design still reflects its former role as a major vehicle travel corridor. As a result, Glasgow Avenue's urban design patterns are inconsistent with the "Main Street" concept. Many of the elements defining Glasgow Avenue are highlighted in Figure 3. For example, buildings on Glasgow Avenue are generally set back from the roadway with parking in front, sidewalks are limited and fragmented, there are few crosswalks on Glasgow Avenue, street trees are limited, lighting and signage are designed for people driving rather than walking, there is excess pavement, power lines are prominent, and bike lanes are unprotected from the fast-moving traffic. All of these features encourage driving on the corridor and actively discourage people from walking and discourage all but the most practiced from biking.



Figure 3: Urban Design Conditions

### **Existing Transportation Conditions**

Roadway design on Glasgow Avenue encourages driving and discourages other modes of transportation. While traffic volumes are moderate during off-peak periods, residents indicate difficulty turning at unsignalized intersections during peak travel periods due to increases in traffic volumes. There are numerous curb cuts along the northern third of Glasgow Avenue, which increases accident potential for drivers, pedestrians, and bicyclists. Figure 4 presents average daily traffic counts, signal locations, and the number of accidents (between 2011 and 2014) recorded at each intersection.



Four DART bus routes serve the north end of Glasgow Avenue, using the bus stop at Peoples Plaza. After 9:30 p.m., the buses use the on-street bus stop location on US 40, outside of Peoples Plaza. There are parking spaces designated at Peoples Plaza for park-and-ride commuters. The total daily boardings and alightings on all four DART Routes that serve this area is 2037. Of all of the bus stops on the four routes, the bus stops at Peoples Plaza (on US 40 and within the center) handle 290 of the total boardings/alightings, or 14.2 percent. The assumed riders at Peoples Plaza include local commuters, employees, and shoppers of Peoples Plaza, as well as students at Hodgson High School who have off-site internships as part of their degree program.

Sidewalks on Glasgow Avenue are very limited and discontinuous; the only sidewalks are located in front of the Village at Long Creek, and between Cann Road and the Medical Center on the west side of Glasgow Avenue. The only crosswalks on Glasgow Avenue are located at the signalized intersection of Hodgson High School/Medical Center/Glasgow Avenue. Bicycle lanes are designated along Glasgow Avenue in both the northbound and southbound sides of the roadway. However, no signs are provided and the bike lane pavement markings are limited to intersection locations only. No buffer or barrier is provided between the travel lane and the bike lane. With the numerous commercial entrances and private driveways on the northern third of the corridor, conflicts between bikes and vehicles are likely. Figure 5 presents the locations for bus routes and bus stops, traffic signals, sidewalks, and crosswalks.

DelDOT is conducting counts at key intersections and analyzing current intersection levels of service along the corridor. This information is forthcoming.



Figure 4: Traffic Counts, Accidents, and Signals









Figure 5: Bus Routes, Bus Stops, Traffic Signals, Sidewalks, and Crosswalks



#### **Market Analysis**

Current data and projections show that the broader Wilmington region is extremely healthy economically, and expected to build upon a strong base with robust growth in the short- to mid-term period (2015-2020). The economy is being driven by high wage, office-using jobs clustered in Wilmington and Newark, but slowly moving towards Glasgow as the more traditional office cores become built out.

RCLCO determined that the Primary Market Area (PMA) for this analysis was defined as the areas that would directly use the development offerings on a daily basis. As such, the area is bounded by the Delaware Turnpike (I-95) to the north, Back Creek to the south, slightly west of the MD-DE line, and roughly three miles east of the Glasgow Avenue Corridor. RCLCO also defined a Secondary Market Area (SMA) which would also include households that we would expect to utilize development offerings on a weekly basis. This area is bounded by the Delaware Turnpike (I-95) to the north, Back Creek to the south, eight miles west of the corridor, and 5 miles east of the corridor. Together, the PMA and SMA will make up the areas from which the majority of demand for retail, residential, and office uses will derive.

The Primary and Secondary Market Areas used in this study have high incomes, high home values, and have a financial stability that is supportive of higher end retail than currently exists along the US 40 corridor. In this context of strong economic and demographic fundamentals, the retail offerings along US 40 fail to offer anything that rises above the traditional, strip and power center formats. This is reflected in the relatively low rents but extremely high occupancies that we have seen at this group of retail centers. Peoples Plaza is the most traditional and stable of this cohort. It values its local, long-standing tenants and has very minimal turnover from year to year. This results in extremely low vacancies but stagnant to negative rent growth. Total average rental rates ranged between \$15.00-\$16.00 per square foot over the last three years, while this area was consistently achieving rental rates of \$18.50-\$19.00 before the last recession; this is a market that has struggled to recover to its previous high. The challenge in gaining Peoples Plaza buy in on the eventual Glasgow Avenue plan will be important in the development of the corridor.

RCLCO processes the office development opportunity as more of a longer-term (next cycle) strategy because of the fairly robust pipeline of office projects along the US 40 corridor and a lack of robust demand drivers like pre-existing major employers or superior transportation connectivity. Current vacancy rates (9%) and low rent growth suggest that the current office stock is adequately meeting demand for office space in the area. The immediately surrounding area has not fully emerged as a regional office location, but there is the potential that the current projects in the pipeline combined with the evolution of Glasgow Avenue into a lifestyle oriented retail area could make this the next likely office development site in the next cycle.

RCLCO also processes a niche residential development opportunity in the near term that would feasibly take the form of a limited offering of for-rent units above new retail or attached for-sale townhomes within the context of a mixed-use environment. There is also the potential to provide those for-rent units in the form of a live-work concept that combines living space and work space in a single unit to provide greater connectivity to the retail components of the avenue. Ultimately, residential





development along the Glasgow Avenue Corridor is limited by prevailing demographics and the fairly low propensity to rent in the area, to the extent that any substantial new construction residential development even in a garden format is not purely supportable on its own. However, residential development in limited quantities can still be additive to the mixed-use environment and overall energy of the corridor even if underlying demand does not support more substantial development. Two more niche segmentation opportunities, senior homes and student housing, we believe to have limited demand at the subject site. Given the robust development activity closer to the University of Delaware of purpose-built student rental housing, we do not think there is an opportunity for drawing any substantial student demand along the Glasgow Avenue Corridor. Additionally, we do not process the opportunity for regional-drawing or destination-type senior housing because those are generally located closer to the core of major MSAs or in destination markets outright. Locally-serving senior living shows some demand support, especially in the market for for-sale single-family attached (townhome product), as the 65 and over population makes up nearly 31% of the total demand for these products.

## Highlights and Opportunity Drivers

### **Overarching Takeaways**

- The primary driver of all mid-term and long-term land development will be the extent to which the initial development and corridor improvements can tangibly create an environment which visitors and residents want to interact with on a regular basis. Such an environment will transform opportunities for a robust retail environment, office development, and residential (both for-rent and for-sale) activity.
- To be effective in creating an initial sense of place and an active community node, policy levers must enhance the overall quality of the corridor, ensuring that new developments will interact with and enhance the central Glasgow Avenue Corridor, and carefully curate retail tenants.
- Differentiation from other nodes in this section of New Castle County is critical.

## **Demographics**

- Both the broader SMA and PMA have an income band centered between \$50,000 and \$150,000, with the most households falling in the \$100,000-\$150,000 band. In addition, the proportion of households in higher income bands, especially the \$100,000-\$150,000 band is expected to grow between 2014 and 2019. Overall, median annual income in the PMA is \$80,000, while it is \$74,000 in the SMA.
- The areas surrounding Glasgow Avenue have extremely high median home values, with most of the census tracts in the immediate area having median values of \$250,000-\$400,000.
- Although there is a perception of an aging population in these surrounding areas, within the context of the region, these areas are comparatively young with median ages 35-38.
- Taken as a whole, these characteristics suggest a population that skews younger than the region overall with high median incomes and high home values. With their greater discretionary



income and financial stability, these high income households are prime drivers of demand for higher-end and more lifestyle-driven retail.

### <u>Retail</u>

- Retail in the corridor is dominated by long-term local tenants and traditional national tenants, both of which have not been able to capture a high share of retail dollars in the region.
- Low vacancy (2.5%-5% in the last three years) and moderate rental rates suggest a stable but relatively non-dynamic submarket, suggesting an opportunity for a "first mover" to execute a new, contemporary vision for what is possible in terms of retail development in the corridor.
- The Primary and Secondary Market Areas of this study include a high proportion of households with high annual incomes, high existing home values, and a core financial stability that is supportive of much higher quality retail than currently exists along the US 40 corridor.

## <u>Office</u>

- Due to the fairly robust pipeline of office projects along the US 40 corridor and a lack of robust demand drivers (such as major pre-existing employers or superior transportation connectivity compared to other regional submarkets), an office development opportunity is likely a longer-term (next economic cycle) strategy.
- Although the exact timeline of broad economic cycles is difficult to model, findings broadly suggest that in the short-term (1-3 years) there will be limited office opportunity, with a slightly stronger opportunity in the mid-term (3-6 years) and a high probability of development in the longer-term (6-10 years).
- To support substantial office development in the Glasgow Avenue Corridor, office space would need to attract companies oriented more towards corporate uses. There is an opportunity to attract these corporate users if a walkable, lifestyle retail center can mark the Glasgow Avenue Corridor as an active place, but only after substantial placemaking has occurred.

## **Residential**

- A niche residential development opportunity in the near term would feasibly take the form of a limited offering (24-41 units) of for-rent apartments above new retail or a similarly limited offering (10-15 units) of attached for-sale townhomes, based on a quantitative study of the prevailing depth of rental demand and the kinds of products that work in conjunction with walkable retail centers.
- Given the robust development activity closer to the University of Delaware of purpose-built student rental housing, there is a limited opportunity for capturing any substantial student demand along the Glasgow Avenue Corridor.
- There is a limited opportunity for regional-drawing or destination senior housing as those are generally located closer to the core of major MSA's or in destination markets outright.

Appendix A provides a detailed market analysis for the Glasgow Avenue corridor.



### **Opportunities and Constraints**

The following section summarizes the opportunities and constraints for Glasgow Avenue with regard to creating a "Main Street" on the corridor. This summary is based on information gathered through agency outreach and data collection, stakeholder meetings, and the public workshop in early March. It will serve as a starting point for developing design alternatives for the corridor.

### Land Use and Urban Design

	Opportunities	Constraints
Redevelopment	<ul> <li>Active redevelopment sites at the intersection of Glasgow and US 40: Rite Aid</li> <li>Reybold property</li> <li>Potential redevelopment sites:         <ul> <li>Peoples Plaza in whole or in phases</li> <li>Undeveloped space and parking area between Peoples Plaza and Glasgow Ave (including out parcels under separate ownership)</li> <li>Parcels at entrance to Cann Road (two parcels totaling .7 acres owned by Peoples Plaza)</li> <li>Parcels south of Paxson Drive (5 acre Morrison property and 2 acre Brooks property)</li> </ul> </li> </ul>	<ul> <li>Rite Aid is moving forward with its redevelopment plan prior to Glasgow Avenue Plan adoption</li> <li>Owner's limited incentive to redevelop all or some of Peoples Plaza in the near term, although underlying land use economics suggest potential</li> <li>Few and smaller redevelopment sites south of the Reybold property</li> </ul>
Destinations & Amenities	<ul> <li>Popular and diverse destinations on the corridor—Peoples Plaza, Hodgson High School, Glasgow Medical Center, Canal Little League, Conservation Center</li> <li>Popular recreational destinations nearby—YMCA and Glasgow Park</li> <li>Shopping convenient to housing</li> <li>Sufficient right-of-way to provide sidewalks and bike path to connect corridor amenities</li> </ul>	<ul> <li>Not enough places for kids and families</li> <li>Not enough civic spaces within or adjacent to the residential neighborhoods</li> <li>Difficult to walk to destinations due to:         <ul> <li>Fragmented sidewalk network</li> <li>Lack of pedestrian-scale facilities, such as lighting and signage</li> <li>Inadequate crosswalks</li> <li>High traffic speeds</li> </ul> </li> </ul>
Development Design	<ul> <li>Building locations offer adequate space for new street designs that support people walking, biking, driving, and accessing buses. These setbacks are, in some cases, large enough to allow new development immediately behind the sidewalk without disturbing existing buildings</li> </ul>	<ul> <li>Buildings are generally set back far from the street and parking lots are located in the front, which encourages speeding</li> <li>Few street trees and other green features</li> <li>Prominent utility lines</li> </ul>
Community	Stable residential neighborhoods	Lack of identity or sense of place







	Transportation				
	Opportunities	Constraints			
Road Design	<ul> <li>Sufficient right-of-way for a "complete street" design that supports people walking, biking, driving, and accessing transit</li> <li>Publicly owned land at the south end of the corridor creates opportunity to redesign Old County Road intersection</li> </ul>	<ul> <li>Blind curves at Old County Road and Glasgow Avenue</li> <li>Fast travel speeds due to wide roadway</li> <li>Numerous unsignalized commercial access points and intersections on both sides of the roadway in northern third of the corridor</li> <li>Lack of access alignment (driveway off-sets from east and west side of corridor) causing conflict points within the corridor</li> <li>High travel speeds limiting use of bike lane to only the most experienced riders</li> </ul>			
Transit	• Four bus routes serving the north end of the corridor	<ul> <li>Transit access only at the north end of the corridor</li> <li>Transit stop on US 40/Peoples Plaza is not sheltered from weather or protected from the busy roadway</li> <li>Lack of safe pedestrian connections to bus stops</li> </ul>			
Traffic	• Moderate traffic volumes because much of the through traffic uses SR 896	<ul> <li>No secondary street connections along the corridor between US 40 and Old County Road</li> </ul>			
Bike and Pedestrian	<ul> <li>Multiuse path planned, and partially built, for US 40</li> <li>North/south multiuse trail planned east of SR 896, connecting from Glasgow Park to the Canal</li> </ul>	<ul> <li>Few crosswalks and sidewalks on Glasgow and none across US 40 or SR 896 near Glasgow Ave</li> <li>Bike lanes unprotected and need better connections to a larger network</li> <li>Limited trail and pedestrian connectivity/paths (e.g., no formal connection between ball fields and Peoples Plaza)</li> </ul>			







# **Economics and Market Conditions**

	Opportunities	Constraints
Retail	<ul> <li>Potential demand for higher-end, higher- density, lifestyle-driven retail development</li> <li>Residents are generally leaving to shop for clothing and accessories, general merchandise, electronics, sporting goods, building/garden supplies because it is not highly available in the study area</li> </ul>	<ul> <li>Limited market for retail in a similar format to Peoples Plaza</li> <li>Surplus of food and beverage stores</li> <li>Retail market has struggled to recover from the recession, and rental rates have not fully returned</li> <li>No significant draw to this area for out-of- state or regional shoppers (residents have stated that there are a lot of out-of-state shoppers, but market studies indicate otherwise). Current tenant mix is not positioned for regional or community market capture</li> </ul>
Residential	<ul> <li>Some for-rent apartment demand above retail or attached for-sale townhomes within mixed use development</li> <li>Moderate demand for residential development (apartments, townhouses, and live/work units)</li> <li>New residential projects on Glasgow Avenue, just north and south of the study area confirms locational appeal and potential demand for redevelopment</li> </ul>	<ul> <li>Mixed-use residential doesn't currently exist in the area, so it is difficult to gauge demand</li> <li>Demand supportive of limited residential product offerings</li> <li>Relatively low propensity to rent in the area</li> <li>For-rent apartments are limited and untested in this submarket, and would require developer buy-in</li> <li>New residential development is drivable but not walkable to study area</li> </ul>
Location	Proximity to I-95	Area not visible from I-95



### **Summary of Preliminary Findings**

This information in this report, gleaned from data analysis and stakeholder input, reveal that Glasgow Avenue holds a lot of potential to realize the "Main Street" vision. However, it also lacks certain key characteristics that will need to be fostered through the development of this plan. Some of the main takeaways are summarized below, and in Figure 6.

### **Transportation**

It is clear that people want to come to Glasgow Avenue and utilize the many amenities that it provides, but there is currently only one viable transportation option for most people: driving. While there are four bus lines available, access is limited, and there is no transit access from the southern end of the corridor to the northern end. There are no sidewalks in the commercial section of the corridor, and only a few short stretches otherwise. While there are bike lanes, they are not designed to protect people riding bicycles from the fast pace of traffic. People driving are exposed to many points of conflict along the corridor, due to the many ingress/egress points.

The plan must balance efficiency, safety, and connectivity for all people traveling on and along Glasgow Avenue. Concepts must improve the safety of the road for all users through creation of a "complete streets" environment, which will also add to the "Main Street" feel of Glasgow Avenue. Residents should feel comfortable and willing to walk or ride a bicycle along the corridor, and visitors should be encouraged – by design – to park their car and stroll. The plan must also recognize and incorporate the significant traffic that travels on Glasgow Avenue, and include ways to slow traffic while allowing visitors to access the corridor safely from all directions.

### Land Use and Urban Design

While the land uses themselves are characteristic of a walkable, mixed-use community, the land use patterns and design of development on Glasgow Avenue are not. The plan must recognize that though the corridor is fairly short, it has varying character. Different sections of Glasgow Avenue may realize the "Main Street" vision in different ways and at different times, and the plan must provide provisions for each area. Design guidelines must provide a framework for development that is already being planned, as well as potential future development along the corridor, by encouraging and/or requiring land use patterns and development design that create a pedestrian-friendly, walkable environment.

### **Economic and Market Conditions**

Glasgow Avenue is ripe for certain type of development now, and can ensure its market share in the future by fostering a diversity of uses, residents, and visitors. The plan must cultivate a wider mix of uses, including family-centric destinations (e.g., a library), gathering spaces, and a greater variety of retail tenants, in order to provide amenities for existing residents and visitors, and to expand the community's market potential to draw new residents, for-rent development, and visitors from



surrounding areas. It must also find ways to craft an identity for the Glasgow Avenue area that builds upon its existing strengths but also creates a unique sense of place.



#### Figure 6: Opportunities and Constraints

Three active redevelopment sites (1) and many lots (2) that could potentially develop to support a "Main Street" environment, including mixed-use development, which market studies show as desirable.

Four bus routes (3) serve the north end of the corridor, but pedestrian connections are sparse and access is not easy late in the evening.

Blind curve (4) at Old County Road could be remedied through redesign of intersection using publicly-owned land (5).

Stable residential neighborhoods (6) surround the corridor.

Many curb cuts, particularly at the north end of the corridor. (7)

Close to I-95, but not close enough to be visible from the interstate.

Wide roadway leads to fast travel speeds, but also provides lots of room for a "complete street" design.

Large setbacks (8) and lack of continuous paths and sidewalks (9) discourage walking to destinations on the corridor, but the setbacks provide space for small-scale development and pedestrian-scale amenities.

- Roadway
- Existing Pedestrian Path or Multi-Use Trail (9)
- Planned Multi-Use Trail
- Ingress/Egress Points (Curb Cuts) (7)
   Ingress/Egress Points (Curb Cuts) (7)
   Blind Curve (4)
   Building Setback from Curb (Sample)(8)
   Pond
   Stream