



Reinvent Veterans Parkway

Our Community Vision

Opportunities & Needs Report

24 April 2025

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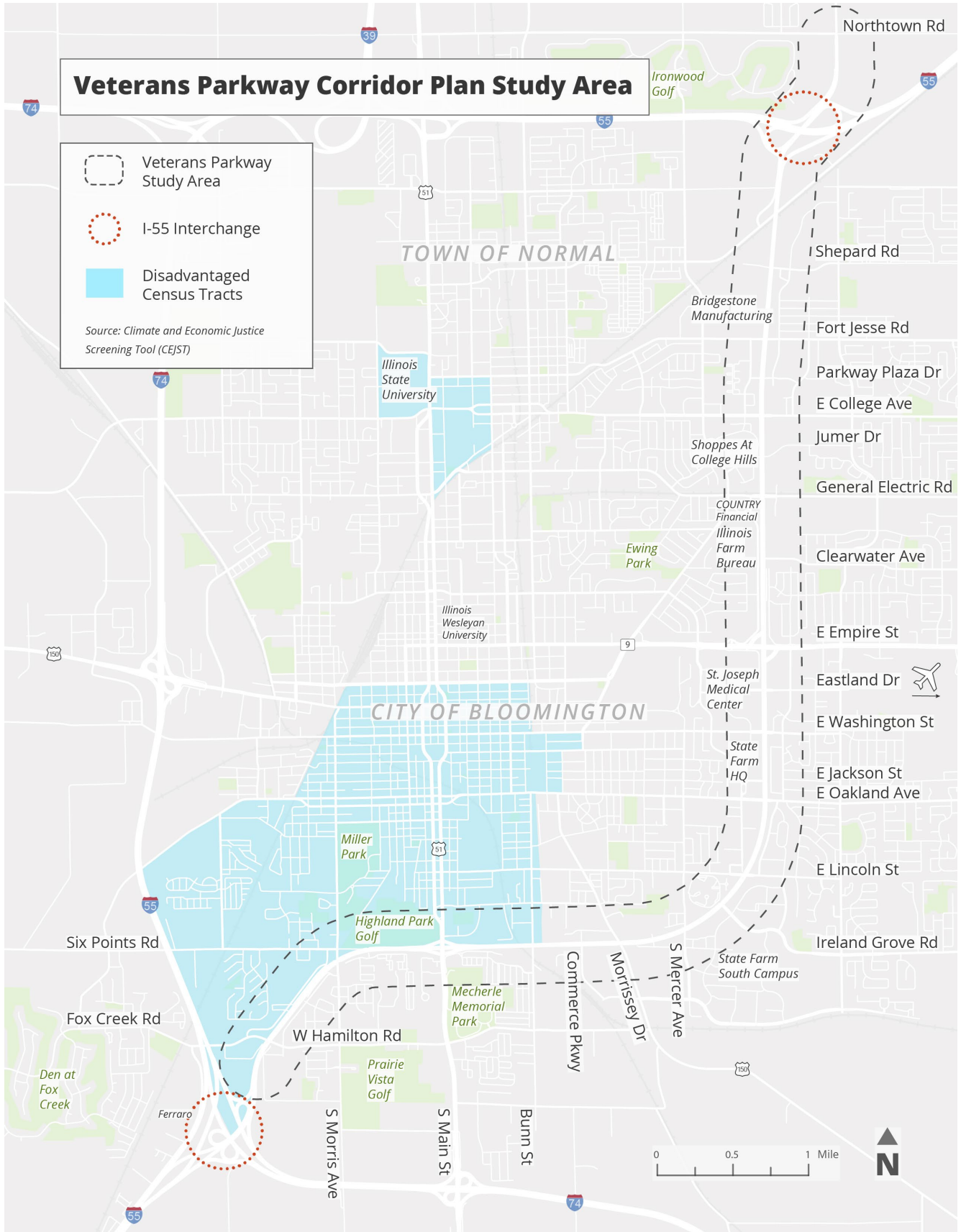


Figure 1: Veterans Parkway Corridor Plan Study Area

Introduction and Key Takeaways

Background and Purpose

Veterans Parkway serves as a 10-mile spine of a highly connected and efficient vehicle network. Yet, the roadway itself often acts as a barrier to pedestrian, bicycle, and transit networks. The corridor study area, which includes Veterans Parkway and a 0.25-mile buffer in either direction of the roadway, is a major regional shopping and employment corridor. However, the 15 census tracts along the corridor study area are also home to over 50,000 residents (see Figure 4). Several of the tracts in the south and western end of the corridor study area are classified as disadvantaged communities, or communities identified as “marginalized by underinvestment and overburdened by pollution.”¹

By identifying trends, impacts, and needs across the community, economy, and transportation system, future infrastructure investments can be more effectively planned to prioritize connectivity, safety, and equitable mobility in the areas that require them most. Modifications such as enhanced pedestrian and bicycle infrastructure, expanded transit services, and a more diverse mixture of land uses have the potential to foster a more inclusive and accessible transportation network, especially for non-motorized users.

This project is divided into four phases (Initial Outreach and Current Conditions, Investigation and Incorporation of New Data, Develop and Refine Corridor Alternatives, and Determine Preferred Corridor Alternative) and is scheduled to conclude in August 2026. With the Current Conditions Report completed, this report represents the findings of Phase 2 and will serve as a basis for selecting specific corridor segments for further investigation into Phase 3 and beyond.

¹ Climate and Economic Justice Screening Tool (CEJST)

Key Takeaways

This report’s analysis identified several opportunities and needs that will shape the allocation of resources and areas of focus in later stages, including several key takeaways:

Corridor Demographic Profile: The census tracts along Veterans Parkway have a much higher population density than McLean County overall. There are minor differences in demographics, employment, and education between the broader county and the Veterans Parkway area. It is notable, however, that Veterans Parkway is more auto-reliant and has a slightly younger population on the north side. This may provide an environment for effective mode-shift efforts in the future.

Community Impact and Comprehensive Needs Analysis: Residents living in the area just north of Veterans Parkway between Morris Avenue and Bunn Street (a federally designated disadvantaged area) tend to have lower access to vehicles and transit than residents in the study area at large. Additionally, this same area has a higher rate of physical inactivity, a higher percentage of the population with mobility disabilities, and higher pollution and environmental health risks. Additionally, despite higher walkability potential, pedestrian infrastructure tends to be sparse and disconnected. Figure 2 summarizes this analysis by comparing McLean County, the Veterans Parkway Study Area Census Tracts, and disadvantaged communities in the Veterans Parkway Study Area to the statewide baseline for Illinois across several key variables to assess relative levels of burden. Findings suggest there is opportunity to enhance access to transit and non-motorized mobility in this area of the Veterans Parkway corridor study area to provide additional connections to the activity and opportunities the corridor has to offer. Additionally, while the census tract at Main Street south of Veterans Parkway was do not reveal similar overall trends of disadvantage, this tract contains pockets of lower-income and transportation-constrained populations—particularly manufactured home neighborhoods directly adjacent to the corridor.

Figure 2: Relative Indicators of Burden in McLean County, Veterans Parkway, and Disadvantaged Census Tracts Compared to Illinois

- Statewide Baseline ■ Meets Statewide Burden ■ Less Burdened ■ More Burdened

	Illinois	McLean County	Veterans Parkway Census Tracts	Veterans Parkway Disadvantaged Census Tracts
No Vehicle Available	-	Below	Below	Above
Walkability	-	Below	Meets	Above
Population 65 and Older	-	Meets	Below	Below
Physical Inactivity	-	Below	Below	Above
Mobility Disabilities	-	Below	Below	Above
Housing Cost Burden	-	Below	Below	Above
Transportation Cost Burden	-	Meets	Below	Above

Market Analysis: The real estate market on Veterans Parkway is relatively steady, with some notable exceptions. Retail is facing headwinds for the first time in decades, exhibited by historically high vacancy and availability rates. Industrial and office markets are showing signs of demand for new, modern space, but slow rent growth shows limited demand for existing spaces. The labor market is bolstered by State Farm, but there has been significant recent growth in the manufacturing industry to further strengthen the export-oriented economy. Opportunities exist for upskilling low-wage employees in key industries like manufacturing, retail, and accommodation and food services. New mixed-use development anchored with a professional training facility, light industrial, or modern office space could be impactful to the economy. Additional opportunities exist in repurposing obsolete retail or industrial space into Class A office or small maker spaces. The largest takeaway for the Corridor should be significant and proven demand for more residential uses at all price points and housing types, outside of single-family detached homes, especially when sited near major transit options or employers.

Post-COVID Impact Analysis: At the onset of the COVID-19 pandemic in early 2020, widespread shelter-in-place and work-from-home conditions led to dramatically reduced travel of all kinds across the United States and in the Bloomington-Normal area. Since that time, daily Vehicle Miles Traveled (VMT) in McLean County have rebounded, with 2024 levels within 3% of pre-pandemic conditions according to data collected by IDOT. On the corridor itself, historical IDOT data indicates that 2023 vehicular volumes rebounded to within 7% of pre-pandemic conditions. Compared to pre-pandemic conditions, travel has shifted later in the day for drivers, and transit users' activity has increased during early-morning and late-evening hours. These shifts in travel schedules across multiple modes may present opportunities to better align infrastructure design to meet the most current needs of Veterans Parkway users.

Corridor Demographic Profile

The Corridor Demographic Profile utilizes the most recent American Community Survey (ACS, 2020) data to analyze demographic trends within the Veterans Parkway study area and McLean County, using census tracts as the unit of analysis. Census tracts intersecting the study area (defined previously as the area within 0.25 miles of Veterans Parkway) were assessed.

A total of 15 census tracts were evaluated, comparing household vehicle access, unemployment rates, and education levels to county- and statewide trends. Figure 4 shows the 15 census tracts intersecting the Veterans Parkway study area. It should be noted that while the census tracts to the north and south of the Veterans Parkway study area appear larger, Figure 5 reveals that these areas have a lower population density compared to other tracts in the study area.

Findings highlight key distinctions between the Veterans Parkway study area and McLean County overall, particularly in employment, and transportation access, while demographic trends such as racial and ethnic distributions are similar across both areas. Overall, Veterans Parkway emerges as a more auto-reliant corridor within McLean County. The section below provides more nuanced details on these analyses and findings.

Population

More than 55,000 residents (56,216) live within the census tracts intersecting the Veterans Parkway study area—approximately 33% of McLean County’s total population. The Veterans Parkway study area has a significantly higher population density compared to the county: 994 people per square mile along Veterans Parkway compared to 145 people per square mile across McLean County. Even with 40% of land within a quarter mile of the corridor dedicated to commercial uses and associated vehicle parking, the Veterans Parkway study area is much denser than the remainder of the county, highlighting its role as a key residential and commercial hub.

When compared to Illinois as a whole, which has an average population density of 221 people per square mile, McLean County is much less dense. The Veterans Parkway study area, meanwhile, far exceeds the statewide average, reinforcing the corridor’s concentrated development and more urban character relative to the broader county and state.

Figure 3: Population Density in Illinois, McLean County, and Veterans Parkway Study Area Census Tracts

	Total Population	Area, Square Miles	Population Density per Square Mile
Veterans Parkway Census Tracts	56,216	57	994
McLean County	172,164	1,186	145
Illinois	12,716,164	57,593	221

Source: ACS Census Tract Data, 2020 5-year estimate

Figure 5 illustrates the population density along and near the Veterans Parkway study area. While less dense than the City of Bloomington’s and Town of Normal’s downtown cores (including the Illinois State University campus), the census tracts intersecting the Veterans Parkway study area are home to a significant proportion of the County’s population.

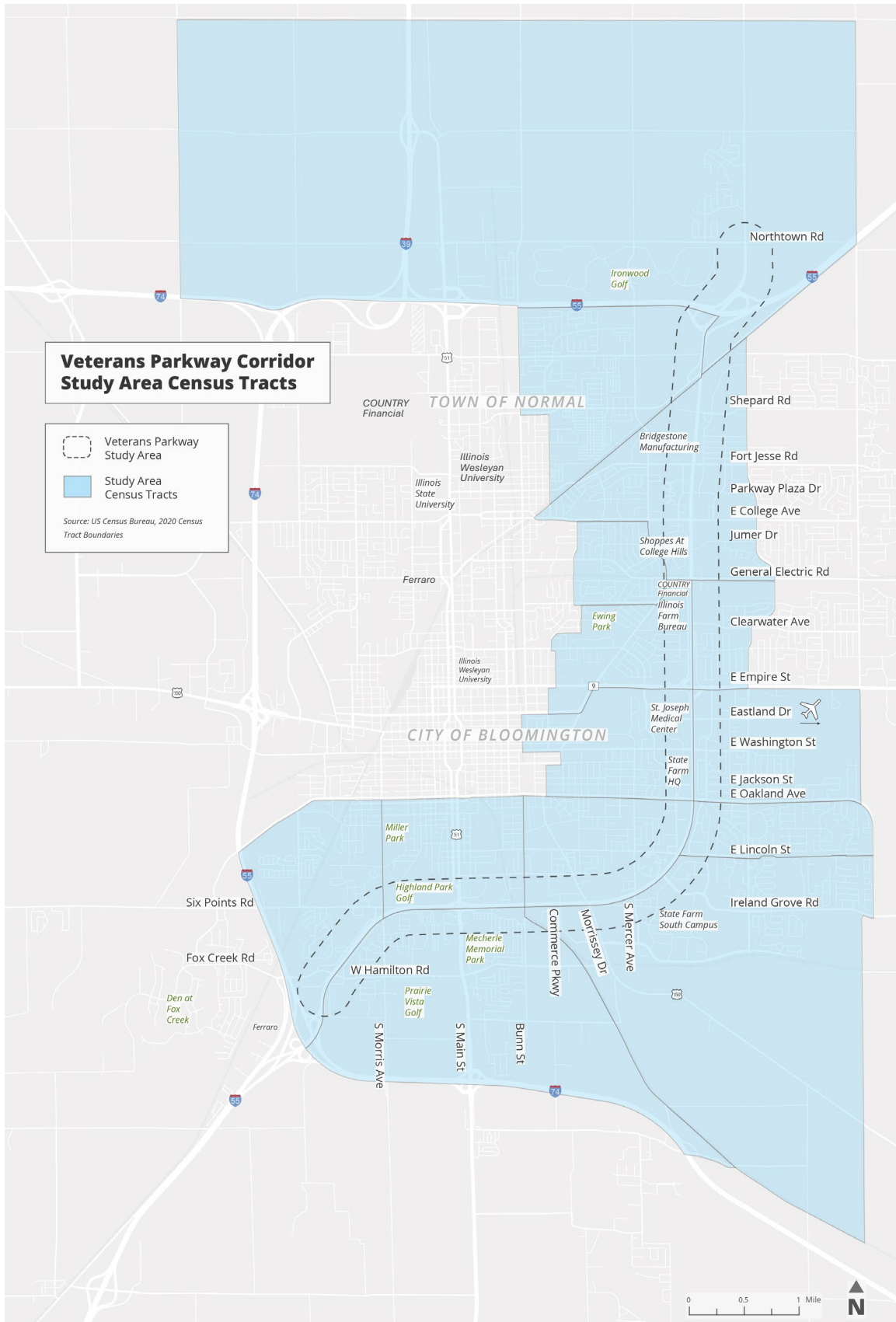


Figure 4: Veterans Parkway Corridor Study Area Census Tracts

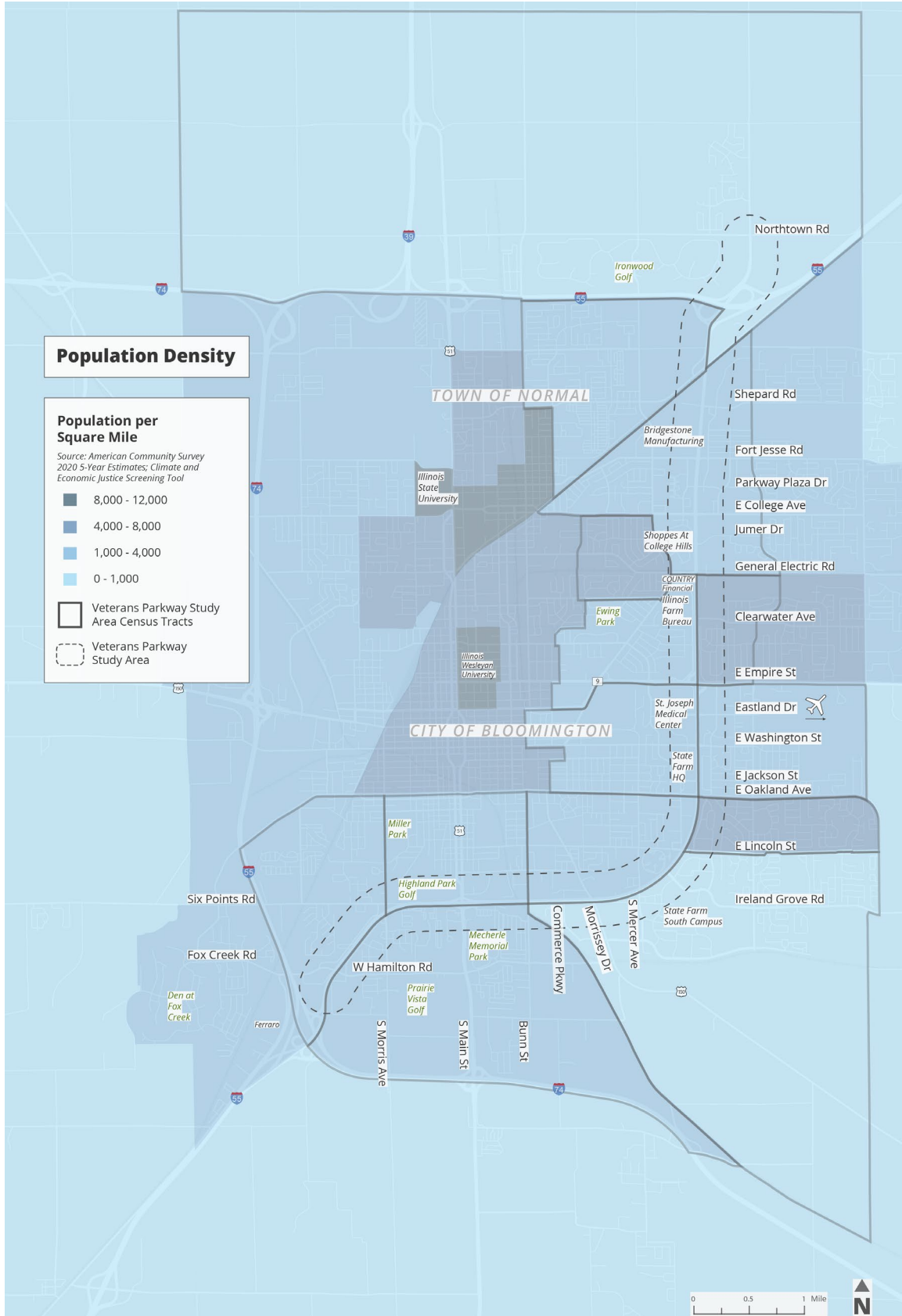


Figure 5: Population Density in the Veterans Parkway Study Area

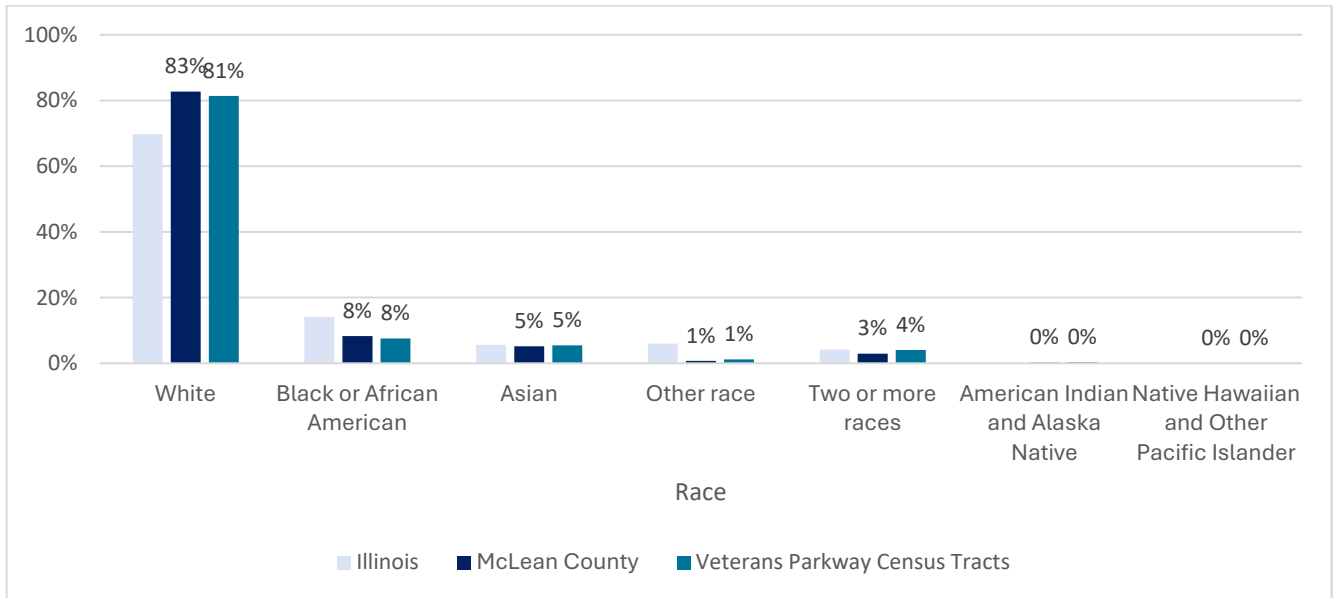
Race

There are minor differences in racial diversity between the broader county and the Veterans Parkway study area census tracts. Both areas are predominantly White, with McLean County at 83% and the census tracts along Veterans Parkway slightly lower at 81%. The proportion of individuals identifying as Two or More Races is marginally higher along Veterans Parkway (4%) compared to the county overall (3%).

When compared to Illinois as a whole, which has a more diverse racial composition, both McLean County and the Veterans Parkway study area have a higher share of White residents. In McLean County, Black and Asian residents tend to be more concentrated in denser areas along Veterans Parkway.

Statewide, 70% of the population identifies as White, significantly lower than in McLean County and Veterans Parkway study area census tracts. Additionally, Illinois has a higher percentage of Black or African American residents (14%) and a slightly greater proportion of individuals identifying as Two or More Races (4%). This suggests that while Veterans Parkway study area and McLean County have some racial diversity, they are less diverse than the state overall.

Figure 6: Percentage of Population in Illinois, McLean County, and Veterans Parkway Study Area Census Tracts by Race



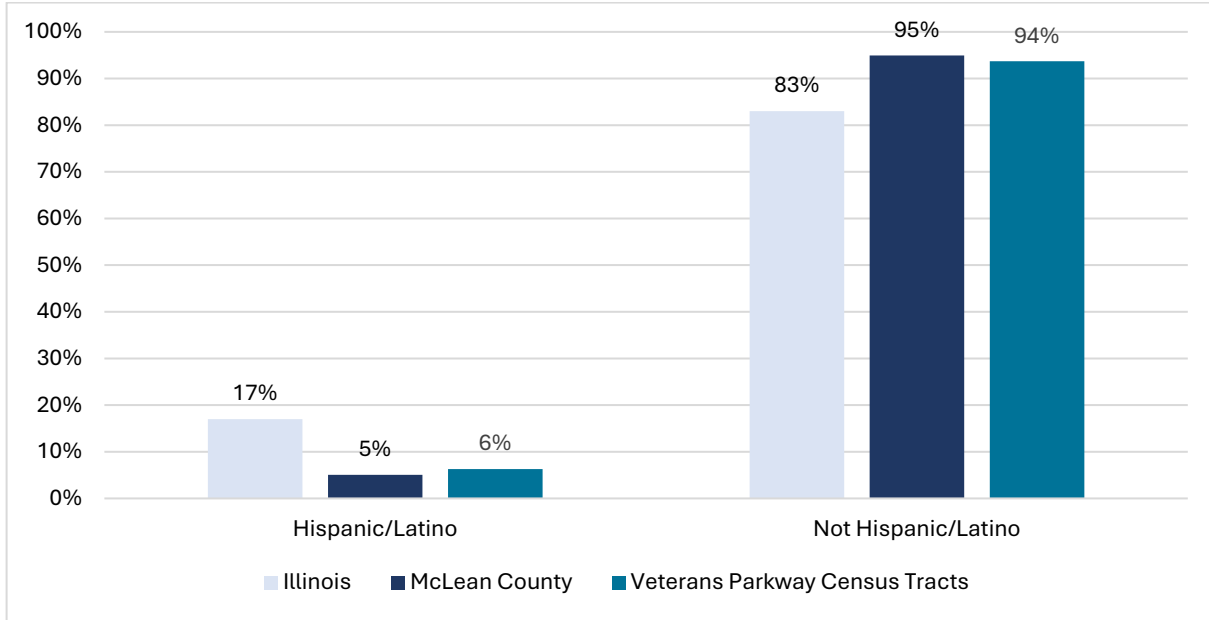
Source: ACS Census Tract Data, 2020 5-year estimate

Ethnicity

When comparing the Hispanic/Latino population in McLean County and the Veterans Parkway study area census tracts, both areas have a significantly lower percentage of Hispanic/Latino residents than the State. Countywide, 5% of the population identifies as Hispanic/Latino and, similarly, 6% of the Veterans Parkway population. This

demonstrates that, although Veterans Parkway study area has a slightly higher percentage of Hispanic/Latino residents than McLean County, both areas are less diverse compared to the overall state population (17%).

Figure 7: Percentage of Population in Illinois, McLean County, and Veterans Parkway Study Area Census Tracts by Ethnicity



Source: ACS Census Tract Data, 2020 5-year estimate

Language Spoken at Home

Based on data for the population 5 years and older, 8% of McLean County residents and 9% of Veterans Parkway study area residents speak a language other than English at home. Of the population in the county who speak languages other than English, 58% are Spanish speakers, while 25% speak Asian and Pacific Island languages. In the southwest portions of Veterans Parkway, generally west of Commerce Parkway, there is a concentration of residents who speak a language other than English.

When compared to Illinois as a whole, where 23% of the population speaks a language other than English at home, both McLean County and Veterans Parkway study area census tracts have lower percentages, suggesting that the areas are more linguistically homogeneous than the state.

Figure 8: Percentage of Population 5 and Over Who Speak Language Other Than English at Home

	Percentage of who Speak a Language Other Than English at Home
Veterans Parkway Census Tracts	9%
McLean County	8%
Illinois	23%

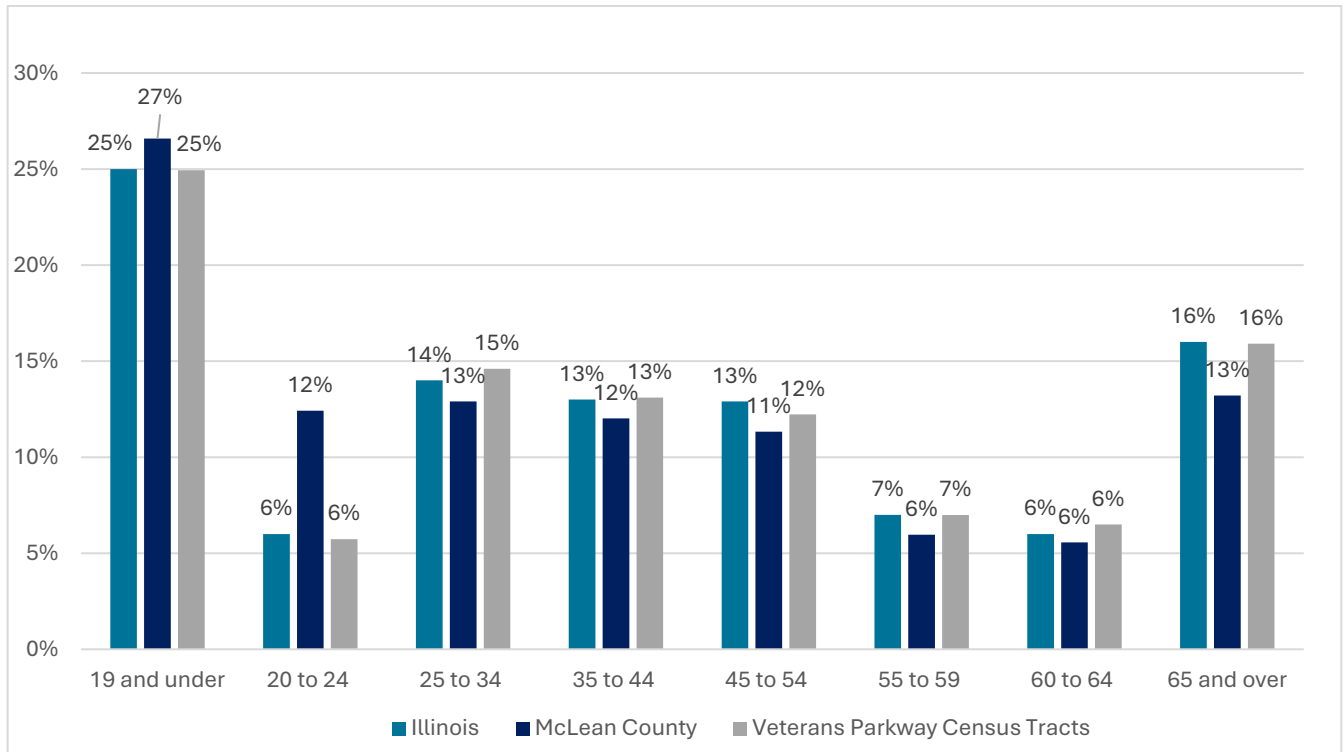
Source: ACS Census Tract Data, 2020 5-year estimate

Age

The age distribution of residents indicates that Veterans Parkway has a slightly older population than McLean County, with 16% of the population 65 and over compared to 13% in the county. The Veterans Parkway area also has the same share of aged 20 to 24 as Illinois (6%). Overall, more areas in the northwest of Veterans Parkway are concentrated with residents aged 20 to 24, as shown in Figure 10.

In contrast, McLean County has a slightly higher share of younger residents, particularly in the 20 to 24 age group (12%) compared to 6% along Veterans Parkway. When comparing these trends to Illinois, the state has a similar age distribution to Veterans Parkway, with 25% of the population under 19 years old and 16% aged 65 and older.

Figure 9: Percentage of age distribution in Illinois, McLean County, and Veterans Parkway Study Area Census Tracts.



Source: ACS Census Tract Data, 2020 5-year estimate

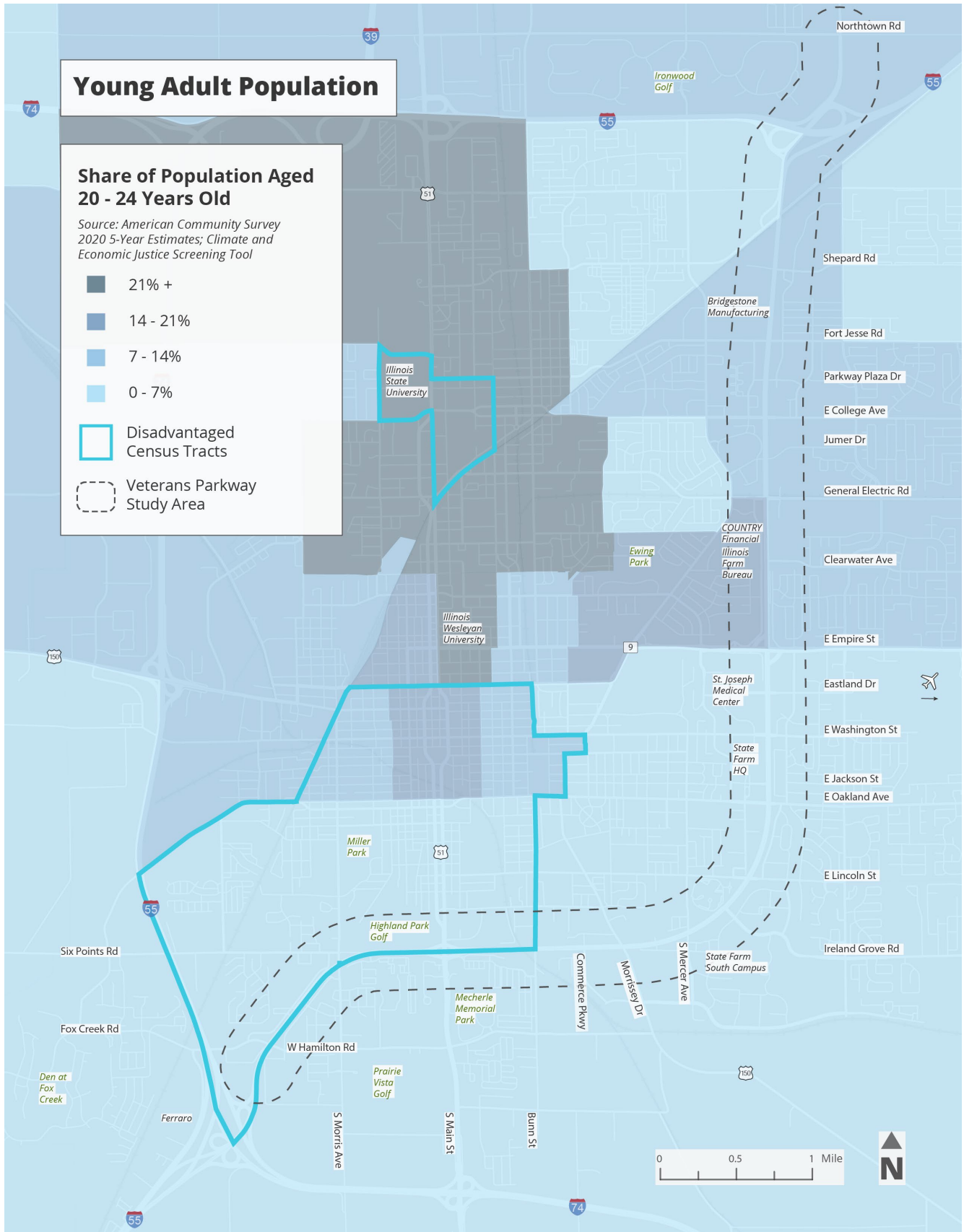


Figure 10: Young Adult Population (20-24 Years Old)

Employment & Education

Unemployment Rate

Labor force participation data shows that McLean County (64%) and Veterans Parkway study area census tracts (66%) have relatively similar employment rates among residents aged 16 and over. Despite these minor variations, unemployment rates are low in both areas, with McLean County at 3% and Veterans Parkway study area census tracts at 2%, signaling a healthy employment environment in both regions.

Figure 11: Percentage of Unemployed Population 16 and Over

	Percentage in Labor Force	Percentage Unemployed
Veterans Parkway Census Tracts	66%	2%
McLean County	64%	3%
Illinois	65%	3%

Source: ACS Census Tract Data, 2020 5-year estimate

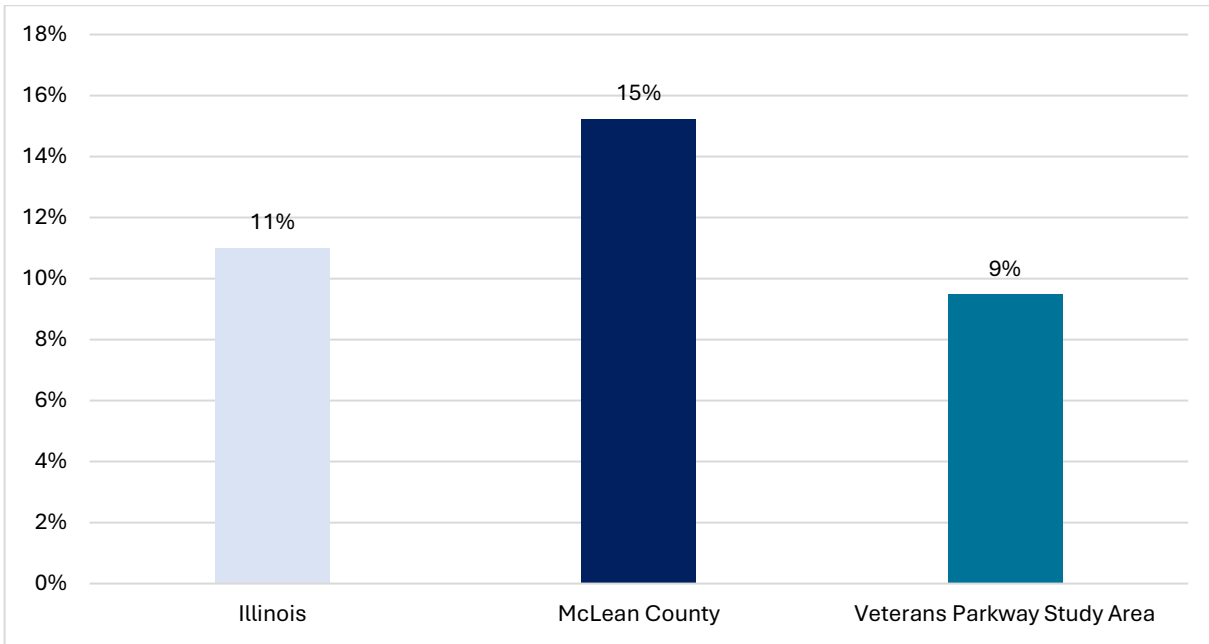
Among the Veterans Parkway study area census tracts, the highest area of unemployment rates falls among the designated disadvantaged census tracts – areas defined as being at or above the 90th percentile for low median income and/or poverty and/or unemployment – where 6% of the labor force is unemployed.

Income

Poverty levels vary between Veterans Parkway, McLean County, and Illinois, highlighting economic disparities across these areas. The Veterans Parkway study area census tracts have a lower poverty rate, with 9% of its population living below the poverty level. In contrast, McLean County experiences a higher poverty rate of 15%, suggesting relatively higher economic hardship in the broader county. Economic activity along the corridor, including demand for commercial activities such as retail, may be influenced by factors such as the presence of Illinois State University (ISU) and major employers along the corridor, which contributes to local employment and spending patterns. However, other structural differences between Veterans Parkway and the broader county, such as income distribution and industry composition, may also play a role in this disparity.

Compared to Illinois, where 11% of the population falls below the poverty line, Veterans Parkway has a lower poverty rate, while McLean County exceeds the state average.

Figure 12: Percentage of Households Below Federal Poverty Line



Source: ACS Census Tract Data, 2020 5-year estimate

Education

Educational attainment in McLean County and Veterans Parkway was assessed for individuals aged 25 and older, with a particular focus on those without a high school diploma. In both areas, 4% of the population lacks a high school diploma. When compared to Illinois as a whole, where 10% of the population lacks a high school diploma, both McLean County and Veterans Parkway have significantly lower rates.

Figure 13: Percentage of Population 25 Years and Over Without a High School Diploma

	Percentage Without a High School Diploma
Veterans Parkway Census Tracts	4%
McLean County	4%
Illinois	10%

Source: ACS Census Tract Data, 2020 5-year estimate

As shown in Figure 14, one of the census tracts with the highest share of individuals aged 25 and older without a high school diploma in McLean County is a designated disadvantaged community along Veterans Parkway between Morris Avenue and west of Bunn Street (see: *Community Impact and Comprehensive Needs Analysis*).

Vehicle Access & Mode Split

Vehicle Access

Household vehicle access is relatively high in McLean County and along Veterans Parkway, with only 6% of households in each area lacking access to a vehicle. This is notably lower than Illinois, where 11% of households lack vehicle access. These trends may be influenced by the population spread and land use in McLean County, which is more rural compared to the urban areas of Illinois, suggesting a greater reliance on personal vehicles in these regions.

Figure 15: Percentage of Households Without Access to a Vehicle

	Percentage of Households with No Access to Vehicles
Veterans Parkway Census Tracts	6%
McLean County	6%
Illinois	11%

Source: ACS Census Tract Data, 2020 5-year estimate

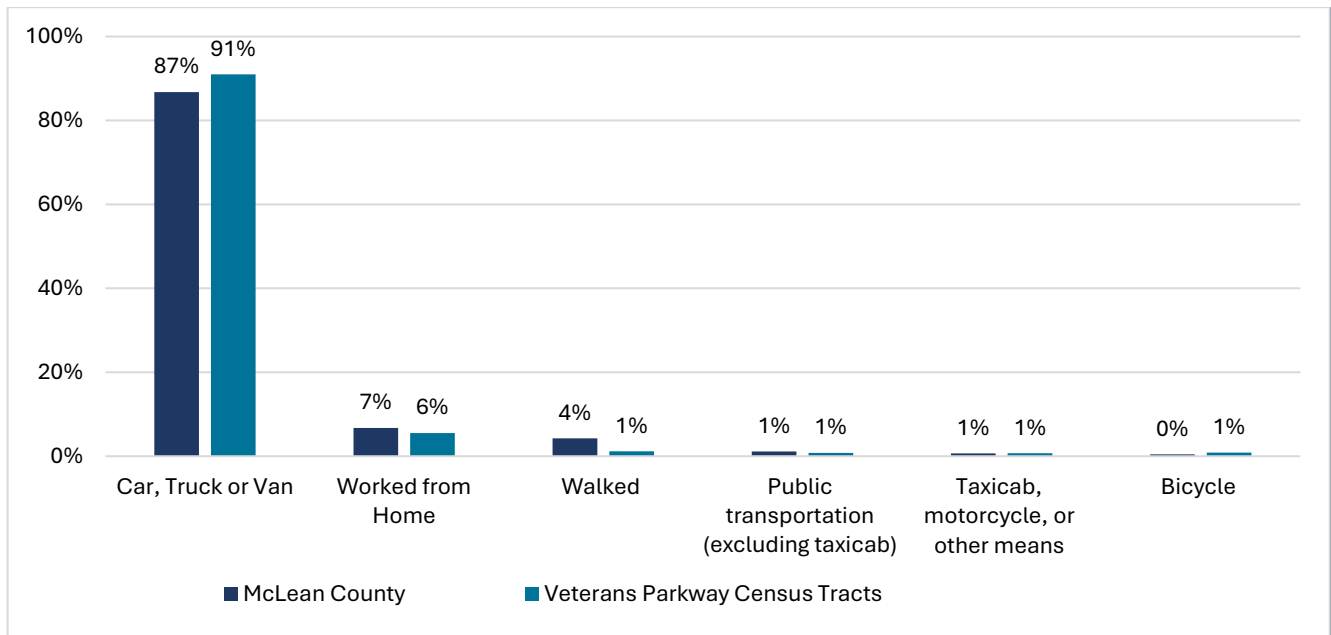
As shown in Figure 16, five of the census tracts with the highest share of households without vehicle access in McLean County are designated disadvantaged communities. 1,166 households within the five disadvantaged census tracts in McLean County do not have access to a vehicle, representing over a quarter (28%) of all the households in the County without access to a vehicle (4,215). This includes the disadvantaged census tracts along the Veterans Parkway study area between Morris Avenue and Bunn Street, where approximately 20% of households lack access to a vehicle (see: Community Impact and Comprehensive Needs Analysis).

Commuter Mode of Travel

As observed in the Current Conditions report and the previous section on vehicle access, McLean County is largely car dependent. Use of alternative modes of transportation remains relatively low. Public transportation usage is minimal, with only 1% of workers 16 years old and over commuting to work by transit in both McLean County and the Veterans Parkway study area census tracts.

However, the share of workers walking as a means of commute to work are higher in McLean County than near Veterans Parkway, with 4% of McLean County residents walking, compared to the 1% walking in Veterans Parkway study area census tracts as a means of commuting to work. This suggests a greater reliance on active transportation in McLean County while commuting to work—perhaps due to behaviors near the ISU campus and downtown.

Figure 17: Percentage of Population Commuting by Means of Transportation



Source: ACS Census Tract Data, 2020 5-year estimate

Community Impact and Comprehensive Needs Analysis

Underserved Communities & Priority Planning Areas

Historically, underserved communities – communities of color, low-income communities, and communities with the highest poverty rates – experience a disproportionate share of the burdens created by transportation systems, operations, and infrastructure.² This may include greater vulnerability to physical safety impacts as a result of proximity to high-speed roadways, or excessive air quality issues and pollution from over-exposure to roads carrying high volumes of truck traffic, for example.³ This issue demands targeted planning strategies and interventions to address these disparities at their roots. By paying closer attention to the adverse impacts experienced by underserved communities and subsequently investing in safer streets in areas that need it most, future investments can meaningfully improve safety, break historic cycles, and create places that are healthier, more just, and more prosperous.

To better understand how these factors unfold along the Veterans Parkway corridor study area, this analysis utilizes several tools and datasets which identify underserved communities and examine various forms of disadvantage across transportation access, health disparities, pollution, and critical opportunity gaps.⁴ To identify disadvantaged communities, the analysis uses the Climate and Economic Justice Screening Tool (CEJST), a nationally consistent dataset that classifies communities based on multiple environmental, health, and socioeconomic indicators. These indicators include factors such as income levels, environmental exposure to hazardous sites or pollutants, health outcomes, and historical disinvestment to measure different categories of burdens communities may face. If a community exceeds the tool's threshold for one or more categories of burden, it is considered disadvantaged. When it comes to transportation impacts specifically, disadvantaged communities often experience inadequate transit systems, lack of affordable transportation options, unsafe non-motorized transportation options, and harmful environmental impacts from highways and freight infrastructure. Census tracts identified as disadvantaged are highlighted in Figure 18 (note that the CEJST relies on data that utilize census tract boundaries from the 2010 US Decennial Census).

Based on the definition above, the census tracts along the southwestern portion of the Veterans Parkway corridor, between the I-55 interchange and Bunn Street, are considered disadvantaged communities. The CEJST defines these communities as disadvantaged because they exceed the tool's threshold scores for water, workforce, and health-related burdens. This means that these census tracts are at or above the 65th national percentile for low income, while also exceeding the 90th percentile for variables associated with these indicators, such as exposure to contaminated wastewater discharge sites, unemployment, or low life expectancy. While there may still be underserved areas outside those census tracts specifically highlighted as disadvantaged by the CEJST, the tool offers a helpful starting point for identifying patterns and setting priorities to improve access to mobility and opportunity.

The following analysis evaluates these census tracts and nearby areas along variables more relevant to this corridor study. Note that while the area near Illinois State University is also considered disadvantaged, it is not the focus of this study.

²<https://www.sciencedirect.com/science/article/pii/B978012818122500020X>

³ <https://www.epa.gov/air-research/research-near-roadway-and-other-near-source-air-pollution>

⁴ Climate and Economic Justice Screening Tool (CEJST); US Department of Transportation Equitable Transportation Community (ETC) Explorer; US Centers for Disease Control and Prevention PLACES; US Environmental Protection Agency Environmental Justice (EJ) Screening Tool

Transportation Access

Access to safe, reliable, and efficient transportation is a fundamental component of community well-being, directly influencing economic opportunity, health outcomes, and quality of life.⁵ In the context of corridor planning, evaluating transportation access is critical to ensuring that all residents – regardless of income, age, or ability – can reach jobs, schools, healthcare facilities, and other essential community destinations. This analysis considers key factors such as vehicle availability, walkability, and public transit accessibility to identify disparities and ultimately inform future transportation investments along the corridor that will benefit all residents.

Vehicle & Transit Availability

Households without access to a personal vehicle face significant mobility challenges, particularly in areas with limited public transit options. Residents who rely on walking or transit may experience longer commutes, restricted employment opportunities, and reduced access to essential services, exacerbating socioeconomic inequities. When transit coverage is sparse, service frequency is low, or stops are poorly connected to key destinations, transportation becomes a barrier rather than a facilitator of mobility.^{6, 7}

In corridors like Veterans Parkway, where development patterns are frequently auto-oriented, gaps in transit infrastructure can disproportionately impact low-income and elderly residents who are less likely to own or drive a car. Overall, 6% of Veterans Parkway residents do not have access to a private vehicle. However, this lack of vehicle access is concentrated in certain places within the study area. Figure 16 indicates that census tracts containing the largest shares of households without access to a private vehicle fall within the disadvantaged census tracts along the southern portion of the Veterans Parkway corridor, predominately between Morris Avenue and Bunn Street. Problematically, these areas tend to overlap with those where existing public transit service is most sparse. As Figure 19 shows, none of the bus stops along the corridor between Morris Avenue and Bunn Street serve more than one unique route, and walksheds tend to be smaller and non-contiguous in comparison to areas further to the northeast of the corridor (between General Electric Road and Fort Jesse Road, for example). Limitations on transit availability and connection potential in these areas may be contributing factors to the lower ridership that these bus stops exhibit, despite the higher demand for transit service one would expect in an area with more scarce access to private vehicles.

⁵ <https://www.sciencedirect.com/science/article/pii/S2666558121000294>

⁶ https://nationalequityatlas.org/indicators/Car_access

⁷ <https://activetrans.org/wp-content/uploads/2020/02/brief-3-employment-links-1.pdf>

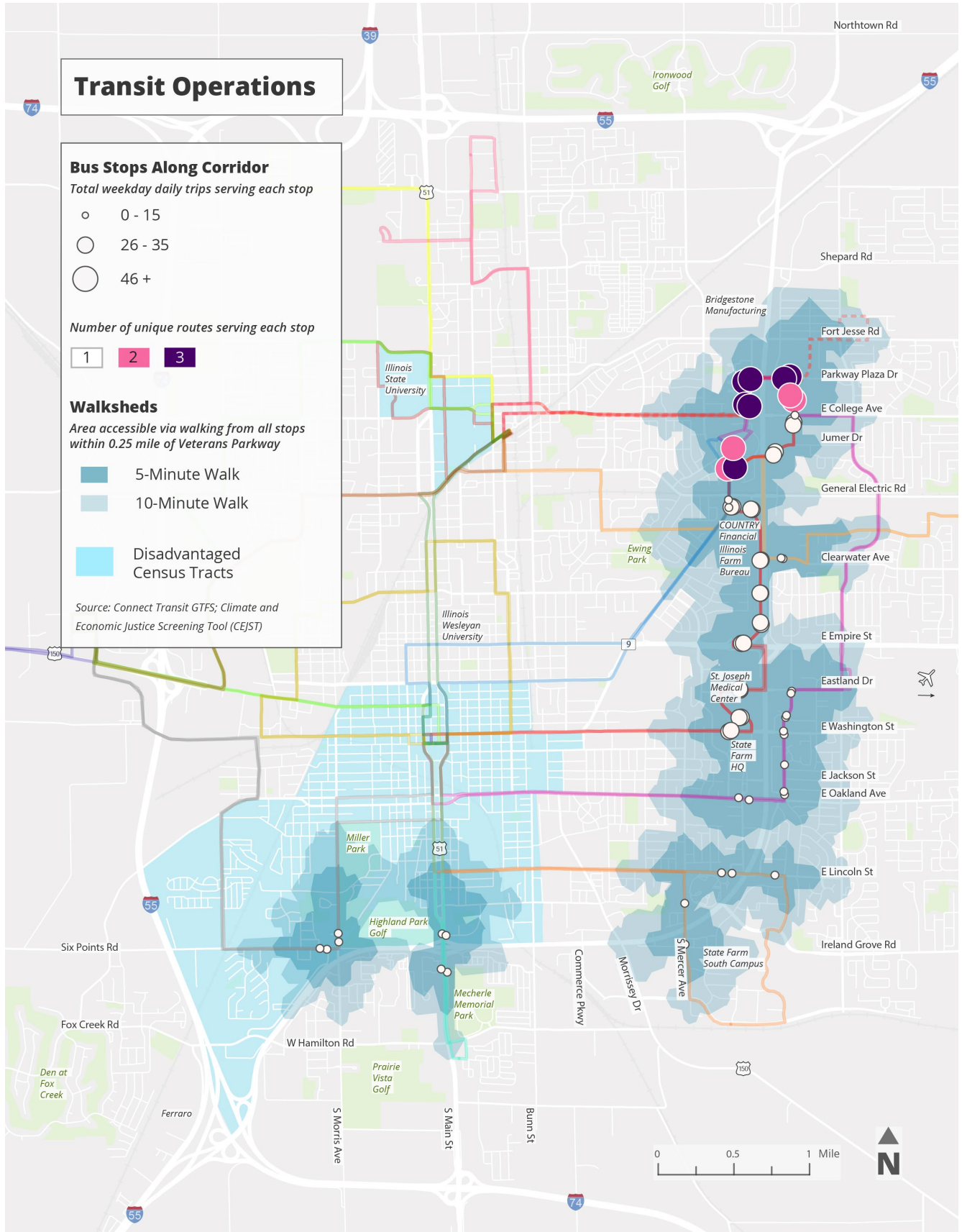


Figure 19: Transit Operations

Walkability

Walkability, a measure that refers to how easily and safely people can walk to local destinations, is an important factor in quality of life and perceived community identity.⁸ A lack of high-quality pedestrian infrastructure – such as sidewalks, crosswalks, and pedestrian signals – creates hazardous conditions and discourages walking, which can reduce connectivity within and between neighborhoods, commercial areas, and transit stops.⁹ Poor walkability not only limits mobility for those without vehicles but also impacts public health more broadly by discouraging active travel choices.^{10, 11}

The Current Conditions Report found the pedestrian network around Veterans Parkway to be disconnected and sparse in many areas (Figure 20). Despite this, Replica data reveal a slightly higher walking mode share in the disadvantaged communities identified along the Veterans Parkway corridor (consistent with lower overall rates of vehicle ownership). Meanwhile, the EPA National Walkability Index (Figure 21) shows a mix of walkable areas within these disadvantaged communities. Critically, while the National Walkability Index accounts for intersection density, public transit proximity, and land use diversity, the Index score is not based on the actual availability of pedestrian-friendly infrastructure such as sidewalks and crosswalks. Together, these factors indicate that the walkability potential of the Veterans Parkway corridor study area – particularly in disadvantaged communities – is not matched by the pedestrian infrastructure provided to support that walkability. Higher shares of walking trips and greater underlying potential for ‘walkable’ areas may reveal unmet demand for pedestrian-friendly infrastructure where it is most needed.

Veterans Parkway itself tends to divide more walkable areas from less walkable ones, indicating that more frequent and accessible crossing points may be needed to enhance pedestrian opportunities between neighborhoods. Improving pedestrian-friendly infrastructure along the corridor can improve safety, encourage multimodal travel, and support local economic activity by making commercial areas more accessible to all residents, regardless of where they live or how they travel.

Replica is a mobility data platform that runs a seasonal, high-fidelity simulation that accurately represents the US population and its travel patterns. The platform leverages a mix of cell phone geolocation data, credit card transactions, and underlying demographic information to create an agent-based model of all US trips. Replica was used for this analysis because it accounts for all trip types, including walking.

The US Environmental Protection Agency’s (EPA) **National Walkability Index** is a nationwide geographic data resource that ranks block groups according to their relative walkability. The national dataset includes walkability scores for all block groups as well as the underlying attributes that are used to rank the block groups.

⁸ <https://link.springer.com/article/10.1007/s11482-013-9246-6>

⁹ <https://pmc.ncbi.nlm.nih.gov/articles/PMC9552087/>

¹⁰ <https://pmc.ncbi.nlm.nih.gov/articles/PMC9847133/#:~:text=Measures%20of%20the%20built%20environment,%2C%20cardiovascular%20disease%2C%20and%20cancer>

¹¹ <https://pmc.ncbi.nlm.nih.gov/articles/PMC4115181/>

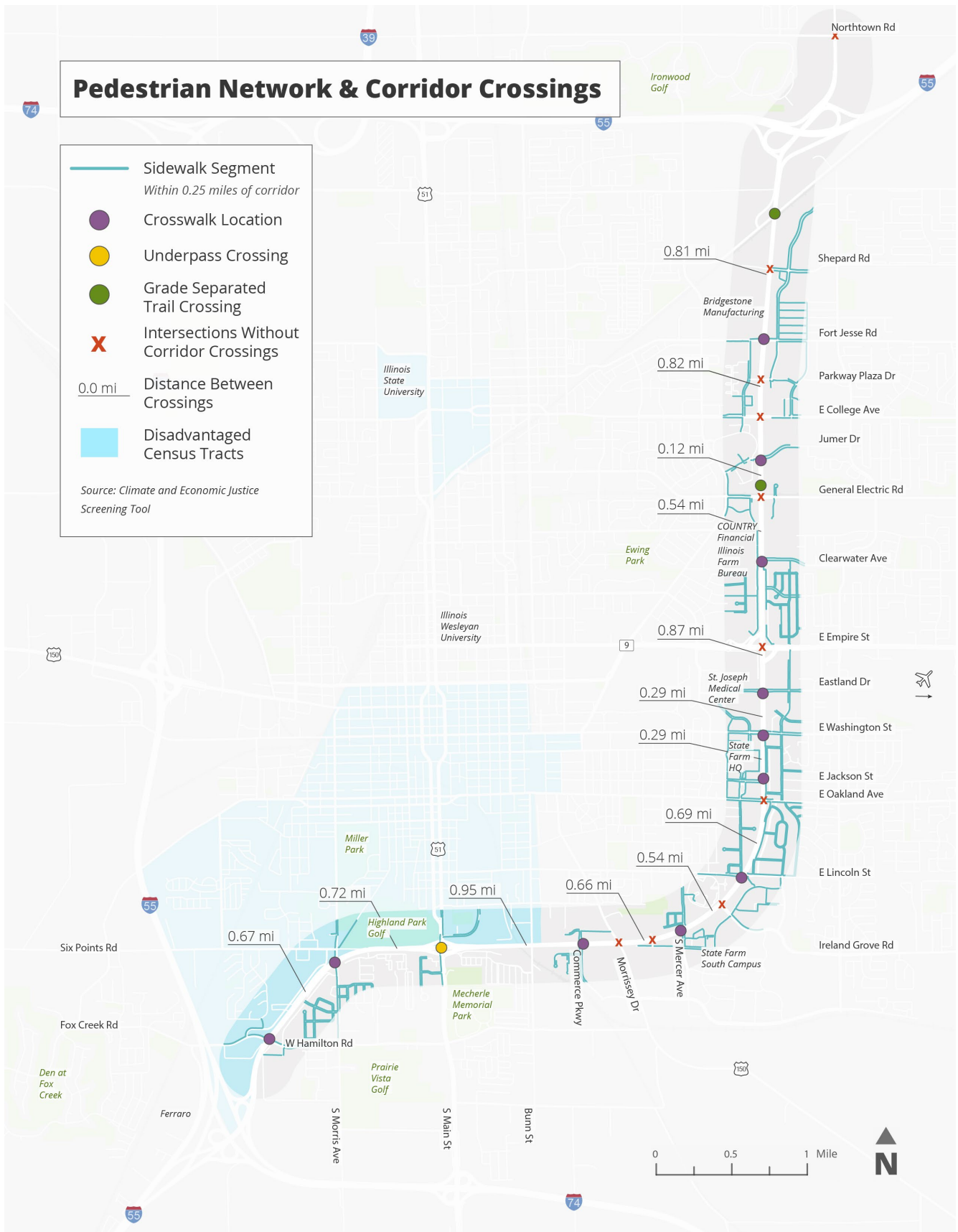


Figure 20: Pedestrian Network & Corridor Crossings

Health Disparities

Public health and the built environment are deeply intertwined, and health outcomes across communities may be influenced by the availability of safe, accessible transportation options.¹² It is essential to consider how transportation infrastructure can mitigate, exacerbate, or otherwise respond to health disparities in diverse communities, particularly for populations that may face higher risks due to age, disability, or exposure to unhealthy or unsafe physical conditions in their neighborhoods. Along Veterans Parkway, this analysis identifies populations with concentrations of older adults, lower rates of physical activity, and people with mobility disabilities to better understand where health risks may be felt most acutely and how transportation plays a key role in proactive approaches to public health and community access.

Older Population

Older adults often face significant barriers to safe and independent travel when transportation networks prioritize automobiles over accessible and pedestrian-friendly infrastructure.¹³ As people age, many choose to begin limiting their driving activity – one study found that 25% of adults 65 and older self-regulate their driving in some way, which may include not driving at night or in bad weather, or only choosing to travel shorter distances for local trips.¹⁴ What's more, a national poll released by the National Association of Area Agencies on Aging (n4a) revealed that 1 in 5 Americans 65 years and older do not drive at all.¹⁵ This underscores the fact that a lack of transportation options are major concerns for older adults, people with disabilities, and caregivers and that there is a growing need to plan for alternatives to car-based travel for this growing sector of the population.

Missing or inadequate sidewalks, lack of curb ramps, poorly marked crosswalks, and inaccessible transit stops can all severely limit mobility for these populations, which can lead to isolation, difficulty accessing healthcare, and reliance on more costly transportation options like driving. An auto-oriented corridor like Veterans Parkway may present challenges for these vulnerable populations, making it difficult for them to navigate their daily needs safely and efficiently. Overall, 13% of Veterans Parkway residents are 65 years and older, slightly lower than McLean County as a whole (16%). However, looking closer at Veterans Parkway, there are specific areas of the study area where older adults comprise an above-average percentage of the population. Figure 22 shows a more concentrated population of older adults along Veterans Parkway between Bunn Street and Oakland Avenue – an area which includes Westminster Village retirement community and The Myerling Home – as well as just west of the corridor north of Ewing Park. While the population density in this census tract is low (less than 1,000 people per square mile), the concentrations of older adults living near the corridor underscore the importance of identifying appropriate transportation solutions that enable people to maintain good health and safely access their daily needs. Two other larger senior living facilities within the study area are located on the far south end of the corridor—Villas of Holly Brook and Luther Oaks.

¹² <https://pmc.ncbi.nlm.nih.gov/articles/PMC9329847/>

¹³ <https://www.nadtc.org/about/transportation-aging-disability/unique-issues-related-to-older-adults-and-transportation/>

¹⁴ <https://pubmed.ncbi.nlm.nih.gov/18696387/>

¹⁵ <https://www.nadtc.org/wp-content/uploads/181206-Survey-release-FINALJVL-4.pdf>

Mobility Disabilities

While disability is not a health outcome, it is central to how people experience life and can greatly impact the way they engage with the built environment in their communities.¹⁶ Individuals with mobility disabilities face significant challenges when transportation infrastructure is not designed with accessibility in mind, creating disparities that make travel difficult or even impossible for those using wheelchairs, walkers, or other assistive devices. In the same travel survey conducted by n4a described above, 80% of young adults with disabilities stated that they're often prevented from engaging in activities they'd like to do because of a lack of transportation or the inability to drive.¹⁷ Figure 23 shows that the greatest concentration of people living with mobility disabilities once again falls along the southern end of the corridor between Morris Avenue and Bunn Street, north of Veterans Parkway. Addressing disparities in these locations requires a multimodal approach that prioritizes universal design and ADA-compliant infrastructure to ensure that all residents can navigate the Veterans Parkway corridor safely and independently, regardless of disability status.

Physical Inactivity

Physical inactivity is another major public health concern, and transportation infrastructure plays a direct role in shaping opportunities for active travel.^{18, 19} When pedestrian and bicycle infrastructure is incomplete, unsafe, or disconnected from key destinations, residents are less likely to engage in walking or biking for transportation and are often less physically active as a result. A lack of safe, convenient active transportation options can contribute to higher rates of chronic conditions such as obesity, diabetes, and cardiovascular disease, particularly in communities with limited access to recreational spaces.^{20, 21} Figure 24 reveals that communities in which adults report the highest rates of physical inactivity align with the disadvantaged communities described above. Conversely, many of these communities rank among the most walkable in the study area, according to the EPA's National Walkability Index (Figure 21). This suggests that while the underlying conditions of the built environment may support high walkability potential (e.g., higher intersection density, proximity to bus stops, and diversity of land uses), the pedestrian infrastructure required to realize that potential may not be insufficient to support walking as a realistic option. This reveals an unmet demand for more pedestrian-friendly infrastructure in these communities to take advantage of these underlying factors and encourage active travel choices wherever possible.

¹⁶ <https://www.cdc.gov/disability-and-health/articles-documents/disability-and-health-data-now.html#:~:text=Disability%20is%20not%20a%20health,of%20every%20community%20and%20population>

¹⁷ <https://www.nadtc.org/wp-content/uploads/181206-Survey-release-FINALJVL-4.pdf>

¹⁸ <https://bjsm.bmj.com/content/43/1/1>

¹⁹ <https://pmc.ncbi.nlm.nih.gov/articles/PMC8625775/>

²⁰ <https://data.bikeleague.org/physical-inactivity-and-public-health/>

²¹ <https://odphp.health.gov/healthypeople/objectives-and-data/browse-objectives/physical-activity>

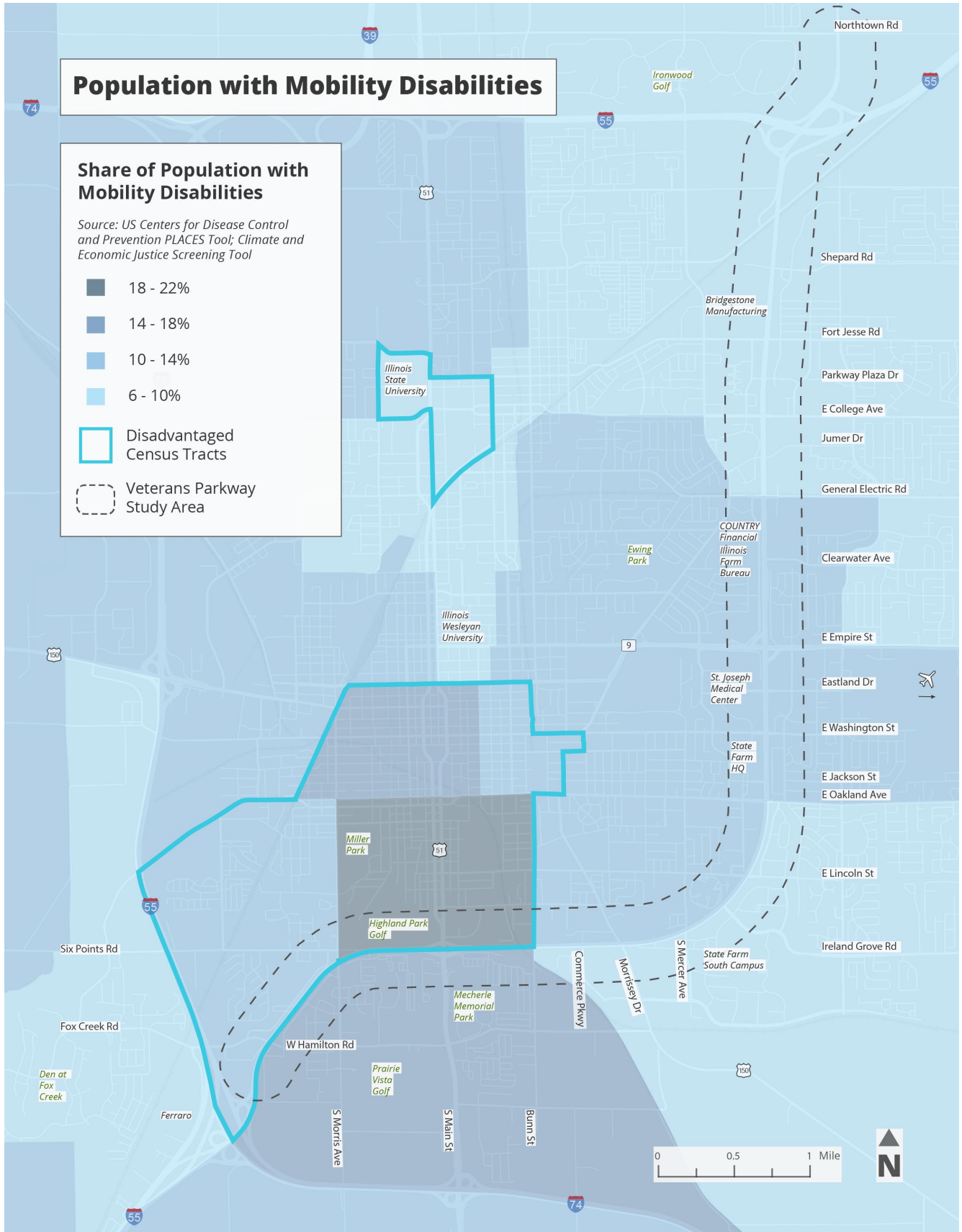


Figure 23: Share of Population Living with Mobility Disabilities

Pollution & Environmental Health Risks

Exposure to harmful pollutants, particularly air pollution, is a critical public health concern along high-traffic corridors such as Veterans Parkway, where vehicle emissions contribute to poorer air quality. The US EPA collects data and measures exposure to harmful air pollutants such as particulate matter 2.5 (PM2.5) and diesel particulate matter, which are associated with respiratory diseases, cardiovascular conditions, and other long-term health risks.²² Complications from these pollutants tend to disproportionately impact children, older adults, racial and ethnic minorities, and lower-income populations, either because they are more sensitive or tend to have higher exposure.²³

This analysis uses data from EPA's environmental justice screening and mapping tool (EJScreen) to highlight areas with higher concentrations of these harmful air pollutants, helping to identify communities that may face higher environmental health burdens. EJScreen combines socioeconomic information with environmental indicators to compare geographies across 13 different indexes, assigning percentile scores that allow for a relative understanding of how one census tract compares to the rest of the nation or state. In this analysis, percentile scores for census tracts in the Veterans Parkway study area are compared to all other census tracts in Illinois.

Corridors like Veterans Parkway, which sees up to 44,380 vehicles per day (as noted in the Current Conditions Report), can be major sources of diesel exhaust and fine particulate pollution, particularly near major intersections and in residential areas close to high-traffic roads.²⁴ Long-term exposure to these pollutants has been linked to higher rates of asthma, lung disease, and heart attacks, with low-income and underserved communities often facing the greatest risks.²⁵ Indeed, Figure 25 shows that the areas along the Veterans Parkway corridor with the highest relative exposure to diesel particulate matter fall within disadvantaged communities between the I-55 interchange and Bunn Street, north of Veterans Parkway, as well as between Empire Street and General Electric Road, west of Veterans Parkway. This indicates that the most harmful impacts of nearby truck traffic and vehicle congestion are felt most acutely in these areas, consistent with other health disparities and indicators of disadvantage discussed above.

To mitigate these harmful environmental impacts, future transportation-focused strategies may include reducing vehicle emissions and enhancing air quality. This could take place through expansion of electric and multimodal transportation options that reduce single-occupancy vehicle trips, incorporation of green infrastructure such as trees and vegetation into public landscaping projects for increased air filtration, and implementation of traffic management strategies to reduce idling and congestion. Prioritizing these interventions can help mitigate the harmful effects of air pollutants on vulnerable populations while moving toward a more sustainable vision for the corridor.

²² <https://www.epa.gov/air-research/air-pollution-and-cardiovascular-disease-basics>

²³ <https://www.epa.gov/pm-pollution/health-and-environmental-effects-particulate-matter-pm>

²⁴ <https://doi.org/10.1016/j.scitotenv.2013.01.074>

²⁵ <https://www.lung.org/clean-air/outdoors/who-is-at-risk/disparities>

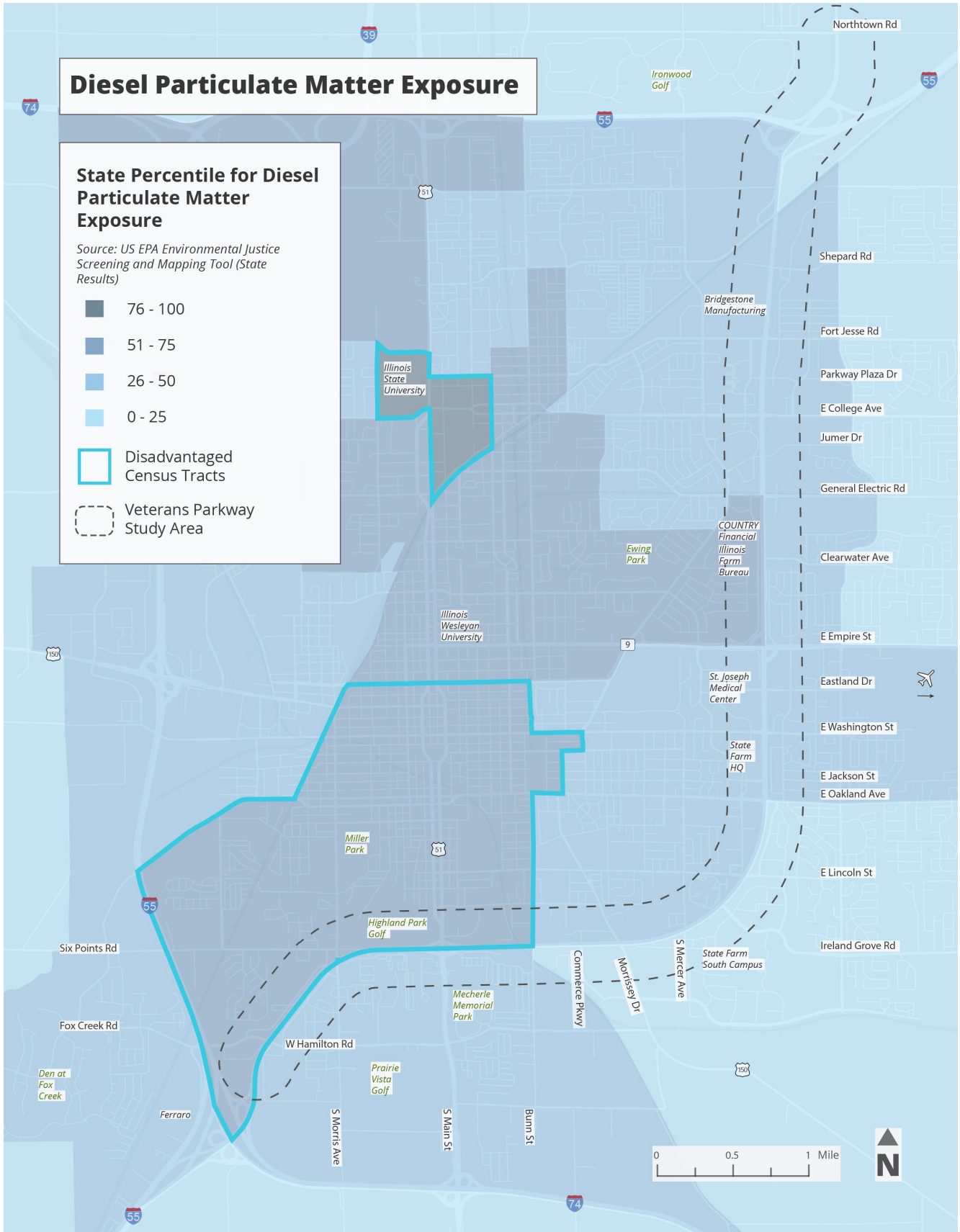


Figure 25: Relative Exposure to Diesel Particulate Matter

Critical Opportunity Gaps

Access to reliable, affordable transportation is a key factor in economic mobility, yet many people also face structural barriers that limit opportunities for education, employment, and stable housing. Individuals without a high school diploma, for example, often face higher unemployment rates, lower wages, and fewer overall job opportunities, making access to educational institutions, workforce training programs, and employment centers essential.²⁶ As Figure 14 shows, the greatest concentration of adults over 25 years of age without a high school diploma are those communities between Morris Avenue and Bunn St, north of Veterans Parkway, where as much as 18% of the population has not finished high school – far greater than the corridor as a whole (4%). Not only are these areas designated as disadvantaged communities, but they are also the very same places where vehicle availability is more limited (Figure 16) and transit service is more sparse (Figure 19). In communities with lower educational attainment, constrained access to various forms of transportation may exacerbate this socioeconomic disadvantage and lead to circumstances in which people struggle to reach the resources and opportunities they need.

At the same time, housing cost burden – defined as households that spend 30% or more of annual income on housing costs – can further compound various forms of disadvantage and limit people’s economic and physical mobility. Figure 26 shows that while the share of households experiencing housing cost burdens is not significantly greater along the Veterans Parkway corridor compared to the Bloomington & Normal metro area at large, no fewer than 17.5% of households – and as much as 52.5% – living in disadvantaged communities experience the burden of housing costs to this degree. When it comes to transportation costs, disadvantaged communities tend to experience this burden more acutely – between Morris Avenue and Bunn Street, disadvantaged communities spend on average upwards of 20% on transportation costs (Figure 27). Together, these statistics indicate that while disadvantaged populations may be able to find housing options that are more affordable for them, they may be forced to travel further and rely on personal vehicles to access critical services and opportunities from these neighborhoods.

Addressing these opportunity gaps that adversely impact disadvantaged communities requires transportation investments that enhance connectivity between residential areas and the places people need to go: employment centers, educational institutions, healthcare facilities, shopping needs, and more. The separation of disadvantaged communities from employment and other key destinations is evident on Veterans Parkway, where retail, office, and medical uses are clustered at the northern end of the corridor, with fewer developments immediately accessible to people living in these disadvantaged census tracts. Expanding and improving the viability of public transit services, building bicycle and pedestrian infrastructure, and supporting transit-oriented developments can help reduce economic barriers while creating more equitable access to mobility and opportunity.

²⁶ <https://www.brookings.edu/articles/higher-education-and-the-opportunity-gap/>

Market and Economic Impact Analysis

A market analysis is key to understanding the economic health of a corridor and allows decisionmakers to prioritize development types and understand where future public funds should be invested. This market analysis has two parts; real estate market analysis and labor markets/business climate analysis.

For the Veterans Parkway real estate market analysis, The 1861 Group studied trends in retail (both free-standing and shopping centers), industrial, office, multifamily (affordable and market-rate), and lodging, across the past 20+ years, depending on property type. The key trend that emerged was an increase in Corridor vacancies in both retail shopping centers, headlined by Eastland Mall, and industrial space, headlined by the General Electric facility. Key findings in the real estate market analysis include:

- Across property types the real estate market is efficient, meaning there are not drastic regular swings in vacancy and rental rates that are not easily explained and, in some circumstances property types are dominated by just a handful of users (e.g. General Electric - industrial).
- Retail on Veterans Parkway is struggling in significant ways, with total retail vacancy at 10.1% and shopping center vacancy at 17.1%. This is a slight improvement from the height of pandemic impacts in 2022, but notably higher than historic pre-pandemic averages.
- Industrial vacancy is driven almost entirely by 295,000 square feet (SF) of vacant space in the General Electric Building. Most industrial users are small (85% of industrial buildings are less than 100,000 SF) and do not significantly impact the market.
- The office market and residential markets are relatively unchanged on a size basis since data sources started tracking these markets. Given the high occupancy rates for these markets, this could be an opportunity for future investment.

The second part of this market analysis is examining labor markets and industry data, to understand the qualifications of the workforce, existing strengths by industry, and where there are opportunities for growing the economy along Veterans Parkway. Key findings in the labor study include:

- The labor market, like the office market, is dominated by State Farm, as finance and insurance is the largest industry sector on the Corridor (39.4% of employment). The next largest industries are lower barrier to entry industries: retail trade (12.9%), health care & social assistance (9.3%), accommodation & food services (9.2%), and manufacturing (9.1%).
- The highest location quotients – a measure of how concentrated industry is locally compared to national average – belong to finance and insurance (9.98), retail trade (1.32), and manufacturing (1.15). This indicates a higher-than-normal concentration of these jobs on the Corridor, and an opportunity to identify upskilling and growth opportunities.
- Recent growth has been headlined by manufacturing, with an additional 2,616 new employees since 2019.
- Within the largest industries on the Corridor there are still significant gaps in the number of employees needed within the key industries of manufacturing, retail trade, food service and accommodation, and, to a lesser degree, finance and insurance.

Real Estate Market Analysis

The Veterans Parkway Corridor real estate market has certain property types that are performing well and others that are facing headwinds, not dissimilar to national real estate trends. In the coming pages, supply and demand metrics will be delved into with the purpose of identifying opportunities and inefficiencies to be addressed in the coming years.

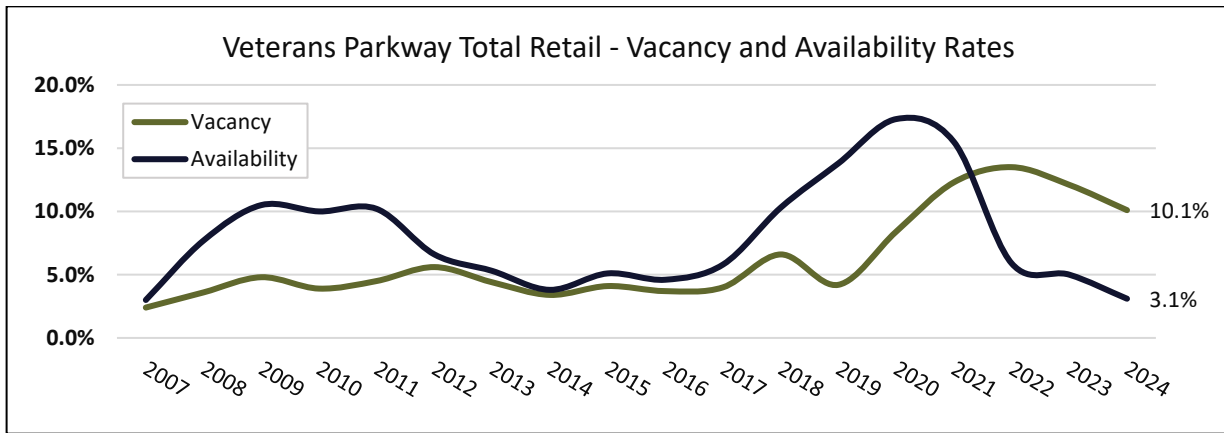
Retail

Veterans Parkway is a regional shopping destination and has been historically dominated by retail. As seen in the prior land use study, 41.3% of land on the Corridor is dedicated to commercial uses (which includes some office uses).

The retail vacancy rate on Veterans Parkways is relatively high, but availability is low, meaning there is space that is leased and empty on the Corridor or is not being actively marketed (such as anchor spaces in Eastland Mall). According to CoStar trends from 2007 onwards, rents have not grown significantly. In 2007, all service type rents were \$11.30 per square foot (PSF), whereas year-end figures in 2024 showed rent at \$11.97. This rent/PSF figure is lower than every year since 2018, which could show a cooling of demand in a new, post-pandemic retail environment.

Nationally some retail market trends bode well. Lifestyle centers and Class A malls, which are newer and have higher trims and amenities, are doing well, while Class B and Class C enclosed malls, such as the Eastland Mall, continue to suffer for a mix of reasons. Triple net (NNN) leases, where the tenant pays all expenses including taxes on a property, are also seeing increased investment activity, including on Veterans Parkway.

Figure 28: Vacancy and Availability Rates for All Retail Types

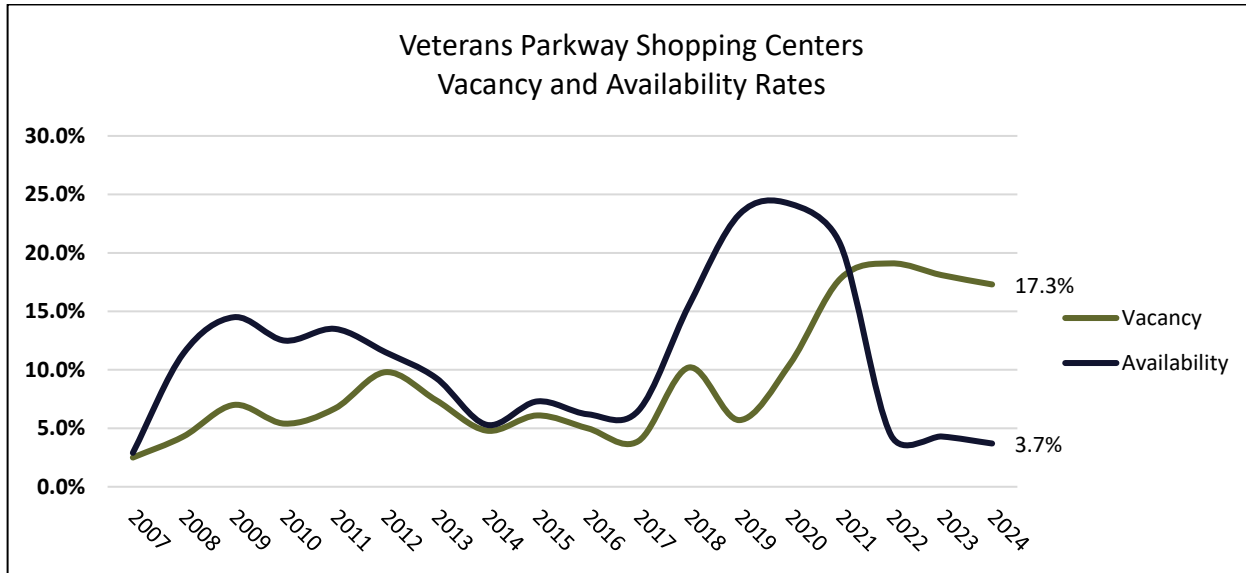


Source: CoStar Analytics. Data retrieved Dec 11, 2024

Given the prevalence of shopping centers on Veterans Parkway, The 1861 Group dug deeper into the shopping center market. Pandemic-related closures and stay-at-home orders created substantial shocks, which caused shopping center availability to spike along the Corridor – topping out near 25% in 2020. While the pandemic exacerbated the trend, retail vacancies were trending upward since 2017 since the decline of Eastland Mall and the Sears and Bergner’s closing in 2018. Vacancy jumped from 3.2% to 10.0% in one quarter in 2018. Prior to that, the Corridor had topped 10% vacancy in only three out of 52 quarters of available data.

In Q4 2024, vacancy stands at 17.3%. While this is an improvement, it is still high for the Corridor’s historic norms. Some of this long-term vacancy has existed since 2018 and is either not being marketed or a lease is still held even if there’s no occupant, likely explaining the low availability rates.

Figure 29: Vacancy and Availability Rates for Shopping Centers



Source: CoStar Analytics. Data retrieved Dec 11, 2024

The three largest available retail spaces are in the Eastland Mall and are the result of anchor tenants leaving. The only anchor left is Kohl’s, which as of Q1 2025 had reported eleven consecutive quarters of declining sales nationwide, which could portend another anchor leaving in the coming years.

Figure 30: Key Retail Vacancies in Corridor

Property Address	Rentable Building Area (RBA)	Total Available Space (SF)	Percent Leased	Year Built
1700 E College Avenue (College Plaza)	95,813	30,200	100	1998
1605 Morrissey Drive	23,181	22,778	2	1993
1615 E Empire Street (Eastland Mall)	380,027	11,011	97	1967
506 IAA Drive	41,300	8,163	80	2019
2103-2109 N Veterans Parkway (Parkway Shopping Center)	202,460	7,758	97	1990
200-235 S Veterans Parkway	24,603	6,360	100	1980
1540 E College Avenue (Landmark Mall)	48,495	6,000	88	1975
902 S Eldorado Road	5,500	5,489	100	1970

Source: CoStar Analytics. Data retrieved Dec 11, 2024

Key findings regarding the retail market include:

- Eastland Mall’s decline for national and local reasons has led to high retail vacancy.
- The high vacancy rate points towards a lack of demand for Class B and C retail spaces. Based on national trends the market could absorb limited new space, especially if located in mixed-use developments or lifestyle centers.
- Many commercial developments on the Corridor in the last decade have been facilities with low operating expenses, such as self-storage, a U-Haul facility, and car washes. These uses take up sizable amounts of land and create few jobs on land that historically was set aside for traditional retail establishments that offer more employment.

Industrial

The industrial market on Veterans Parkway has just 26 buildings (out of 410 commercial buildings) according to CoStar. The Corridor’s history and identity as a retail hub made commercial use a preference. Newer industrial buildings are rare in the market, and especially on the subject Corridor. In the Bloomington-Normal market, Rivian is the largest industrial user, which has built facilities on the outskirts of this Corridor, including in the area’s largest industrial cluster at the intersection of Northtown Road and Main Street, north of I-55.

The 26 industrial buildings on Veterans Parkway Corridor are a combination of very small buildings and a handful of very large industrial buildings. There are four buildings larger than 100,000 SF, while the remaining 22 buildings total 397,000 SF, combined, and average out to 18,045 SF per building.

No buildings on the Corridor built since 2000 are larger than 10,000 SF, and the four largest buildings on the Corridor were all built prior to 1980. This is atypical of national trends, as typically new construction has trended larger and its use towards warehousing and transportation, distribution, and logistics (TDL). Despite the aging building stock, the Corridor and the wider market is seeing growth in manufacturing employment.

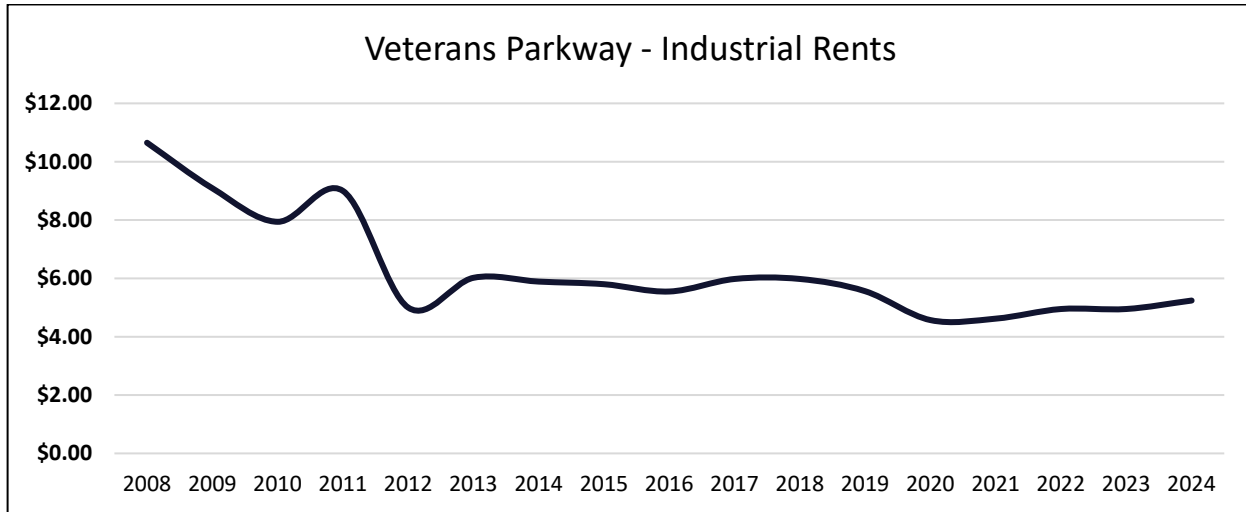
Figure 31: Industrial Buildings 100,000+ SF on Veterans Parkway

Building Address	Property Name	Building Size	Year Built	% Leased
1600 Fort Jesse Road	Bridgestone Manufacturing Plant	698,795	1965	100%
1601 General Electric Road	General Electric Building	450,000	1954	34.4%
2047 E Ireland Grove Road	Wilder Building	150,244	1975	100%
2 Hardman Drive	Taylor Commercial Printing	116,237	1980	100%

Source: CoStar Analytics. Data retrieved Dec 11, 2024

Asking industrial rents along the Corridor have fallen since their peak in the mid-aughts and have been below \$6/SF since Q3 of 2019. This is an indicator of little demand for existing industrial space on the Corridor. Supporting the notion that the demand for existing space is low is the fact the General Electric Building is only roughly one third leased despite having significant vacancy since 2020. The smallest available space within the General Electric Building is 60,000 square feet, which would be one of the eight largest buildings on the Corridor if it was a standalone building. Prior to this large vacancy hitting the market, vacancy had not surpassed 5.5% since at least 2007 (as far back as CoStar tracks). In response, brokers and building owners could change their marketing and leasing strategies to embrace low-cost light industrial and maker spaces.

Figure 32: Industrial Rents



CoStar Analytics. Data retrieved Dec 11, 2024

The heart of Veterans Parkway, near State Farm’s Corporate South campus, is not suited for new industrial construction. New industrial construction has trended towards larger warehouses directly adjacent to expressways, whereas in the heart of Veterans Parkway users could find themselves three or four miles from a connection to I-55 or I-74. Any new industrial construction should be sited near the termini of Veterans Parkway and I-55. The exception to this would be for smaller users in mixed-use developments, where light industrial or small- to medium-sized maker spaces could be located.

Office

The office market consists of one very large user, State Farm, and then a number of smaller floorplate buildings and operators. State Farm owns and occupies 58.8% of the total office space on the Corridor. This is soon to change, as State Farm plans to consolidate operations within the State Farm Tower at 1 State Farm Plaza and to expand its presence across the Sunbelt.

Figure 33: Office Buildings 100,000+ SF on Veterans Parkway

Property Address	Property Name	RBA	Year Built
1 State Farm Plaza	State Farm Tower	1,502,290	1972
1701 Towanda Avenue	Illinois Farm Bureau	533,948	1959
2702 Ireland Grove Road	State Farm Operations Center	485,419	1991

Source: CoStar Analytics. Data retrieved Dec 11, 2024

Like the industrial market, the office market is a tight and steady market, with a low vacancy rate since 2017 ranging from 0.2% to 2.1% and similarly steady rent growth. This shows persistent demand for office space, but not enough growth to justify new office space. Since 2000, just 141,000 SF of new office space has been constructed, and just one new building, at 3,551 SF, has been completed since 2004. Additionally, gross rents have ranged from \$10.54 to \$16.51 since 2007, with the \$16.51 coming at year-end 2024, showing strong demand for office space locally. Without enough space for businesses to move and grow into, many businesses are likely remaining in office space they may outgrow in another market that had space to move into.

Besides a spike of vacancy due to the pandemic in 2020, the total available space in the market has not surpassed 2.2% of the total office space on the Corridor and is now sitting at 0.4%. Coming out of the leasing trough of 2020, the following two years had the highest leasing activity (a combined 32 new leases signed) since at least 2007 as business owners came out of the pandemic confident the economy would continue to grow. This is an anomaly from national trends, where markets across the country are seeing persistent headwinds in the office market.

Key findings from the office market include:

- Demand metrics for offices show an office market that would likely be able to absorb new space, which would allow for new business growth in office employment.
- The consolidation of some of the State Farm facilities would open up a large amount of office space, but the facilities are likely too large for almost all office users in the market.
- Some of the Class B and C retail spaces could be ripe for office conversions as well.
- A lack of new, Class A space of any size is potentially holding back business growth, especially in small- and mid-sized businesses.

Residential

The multifamily market along the Corridor is relatively limited, especially from a new construction perspective. This is due to the Corridor's function as a regional retail hub and shopping destination. Within a quarter mile of the Corridor there are 3,200 rental units, and since 2008 only four developments have been built or renovated, with the most recent new building completing construction in 2020.

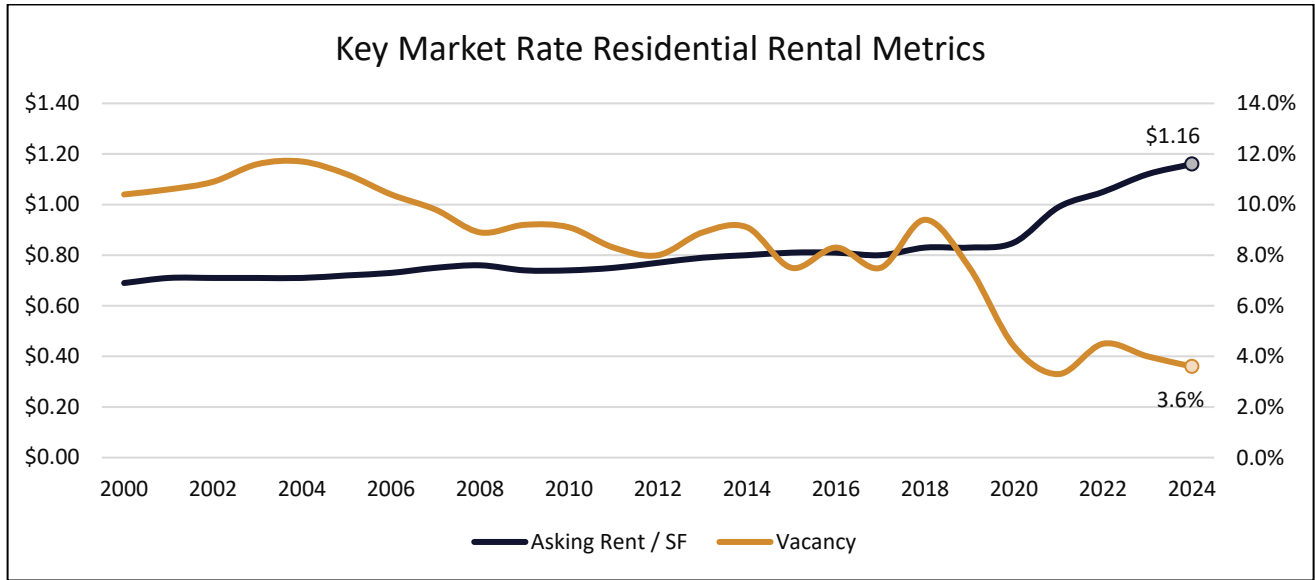
Market-Rate

Market rate rentals have seen a 4%+ year-over-year rent growth since 2020, exhibiting strong demand for multifamily product on the Corridor. Year-over-year rent growth in 2021 grew to 17.5%, which is an outlier likely attributed to two factors: the first is the pandemic and its economic impacts, and the second is the newly renovated Grove at Main, a 165-unit apartment building with significant renovations completed in Q2 2020. Renovations can impact occupancy as well as asking rents, and when delivering during an emergency that destabilized much of the US economy, it is understandable that rents were lower in 2020 and ramped up upon stabilization in 2021.

As for building typology, three-story buildings comprise 52% of the buildings and 61.4% of the units along the Corridor. On average, these buildings were built in 1987 and are typically newer than one- and two-story properties which are built, on average, in 1976. Accordingly, these newer buildings are graded as nicer quality buildings, which often come with amenities and luxuries older buildings may not have. Just one property completed or substantially renovated in the 21st century, Grove at Main, has more than 100 units, and the three largest multifamily properties, including Hilltop Mobile Homes, were all built in 1971 and earlier. Of all market-rate units, 60.8% of units are in Class C buildings – the lowest rating in CoStar's database.

Since 2020, the residential vacancy rate has been below 5%, showing consistent demand. A balanced market is typically around 7% vacancy to allow for housing mobility, which indicates this Corridor's rising rents could be attributed to its tight occupancy rate. Rents on a PSF basis steadily rose from \$0.69 PSF in 2000 to \$0.85 in 2019, but since then they've climbed to \$1.16 PSF as of Q4 2024. Another way to frame this drastic change, is that on a per-unit basis, this equates to a monthly rental rate increase of \$136 over twenty years (from 2000 to 2020), and \$255 increase within four years (2020 to 2024). Again, at least some of this is attributable to the opening of the Grove at Main, though it is not top of market rents on either a per-unit nor a PSF basis.

Figure 34: Key Residential Metrics – Market Rate



Source: CoStar Analytics. Data retrieved Dec 11, 2024

Affordable Housing

Affordable housing on the Corridor is sparse, totaling 185 units (5.8%) of all multifamily units on the Corridor. Most of these units are in three buildings, with two located at the Veterans Parkway/Main Street intersection, and all are located south of Oakland Avenue. None of the affordable housing on the Corridor is located in Normal, and just two multifamily properties on the Corridor are in Normal, with the rest in Bloomington.

Figure 35: Affordable Housing Properties on Veterans Parkway Corridor

Property Address	Property Name	Number of Units	Avg. Unit Square Feet	Avg. Asking/Unit	Year Built
1716 RT Dunn Drive	Main & Veterans Crossings	80	750	\$945	N/A
1005 Four Seasons Road	Lincoln Lofts	65	997	\$1,031	2022
108 Oak Creek Plaza	Oak Creek Plaza	36	1,150	\$1,219	1993
1701 Salem Road	N/A	4	900	N/A	1977

Source: CoStar Analytics. Data retrieved Dec 11, 2024

The most recent development is Lincoln Lofts, which is now in Phase II and received state funding to build 54 new units for households earning at-or-below 60% area median income, which equates to \$66,180 for a family of four. Phase I, which was completed in 2022, offers units ranging from one to four units and used Low Income Housing Tax Credits (LIHTC) for financing. Development was led by St. Mary Development Corp with support from the Bloomington Housing Authority. Lincoln Lofts has vacancy below 1%, showing demand for affordable housing that is in line with the overall affordable housing vacancy figure of 1.6%.

Residential Key Findings

- Rental rates for both affordable and market-rate units have outpaced earnings, and vacancy has dropped from persistent double-digit vacancy in the early aughts - 10.4% and higher from 2000-2006 - down to 3.6% at year-end 2024 for market-rate units. This extremely tight vacancy, which is higher than affordable units, does not fall in the optimum range for allowing economic mobility.
- There are opportunities and demand for more housing throughout the Corridor, which can clearly support more affordable and market-rate housing.
- Housing that supports employees along Veterans Parkway should be a priority, which would be aimed at middle and low-income households.

Hospitality

The hospitality market on Veterans Parkway is evolving from one of a high concentration of local/independent operators to one of national ownership and management but remains an important part of the Corridor’s ecosystem. The lodging options offer conference and meeting spaces and support Illinois State University, State Farm and other smaller agencies like the Illinois Farm Bureau.

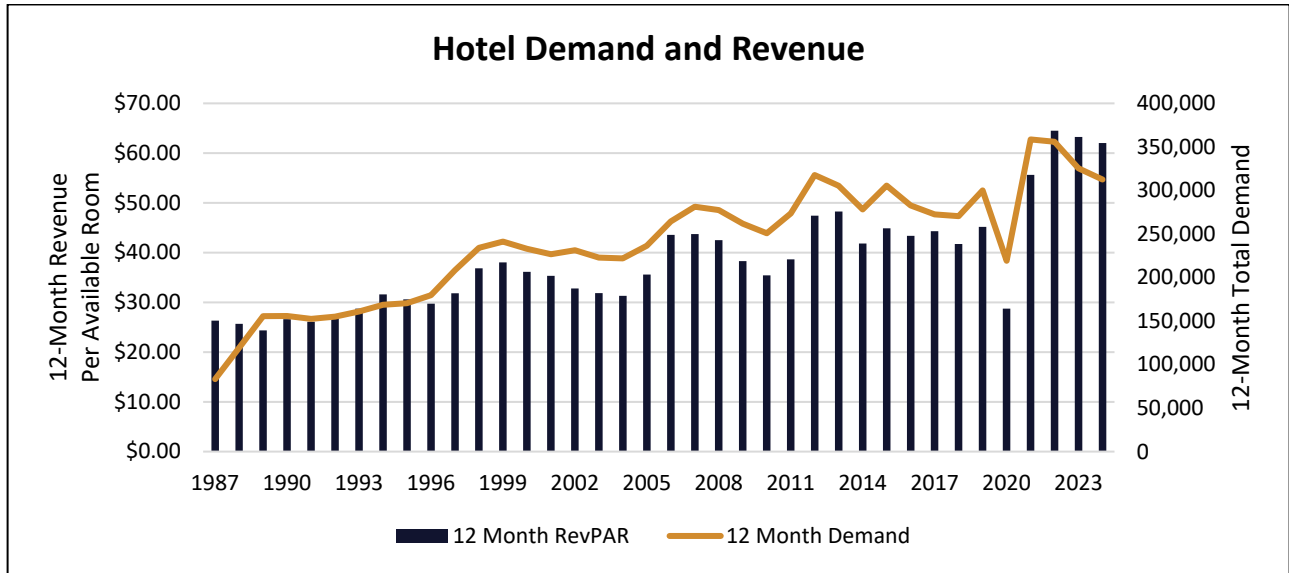
Figure 36: All Hospitality Properties on Veterans Parkway Corridor

Property Name	Rooms	Operation Type	Year Built
DoubleTree by Hilton Hotel Bloomington	197	Franchise	1996
The Chateau Hotel & Conference Center	180	<i>Independent</i>	1988
Hampton Inn & Suites Bloomington-Normal	128	Franchise	2007
Eastland Suites Hotel & Conference Center Bloomington	112	<i>Independent</i>	1987
Candlewood Suites Bloomington-Normal	110	Franchise	2007
Extended Stay America Bloomington - Normal	101	Chain Management	2001
Residence Inn Bloomington	100	Franchise	2014
Best Western Plus Bloomington East Hotel	95	Franchise	1985
Holiday Inn Express & Suites Bloomington Normal	86	Franchise	1999
Quality Inn & Suites Bloomington University Area	80	Franchise	1981
Courtyard Bloomington Normal	78	Franchise	1990
Super 8 Bloomington	60	Franchise	1985

Source: CoStar Analytics. Data retrieved Dec 11, 2024

Both demand and revenue per available room (RevPAR) suffered significantly in 2020 as in-person meetings and travel both slowed in response to the pandemic. RevPAR has since returned to pre-pandemic levels as seen in the following chart. The higher RevPAR reflects significant inflation and higher operating costs for hotels.

Figure 37: Key Hospitality Metrics



Source: CoStar Analytics. Data retrieved Dec 11, 2024

Notably, the most recent hotel constructed was the Residence Inn in 2014 and according to CoStar, there are zero Class A hospitality facilities within the Corridor. Of the 13 unique facilities, two are independent hotels and seven are franchises of national brand hotels. Four of the hotels are taller than three stories, making them some of the tallest buildings on the Corridor.

The 12-month occupancy for these hotels has returned to historic norms, with 2023 and 2024 being more in line with the forty-year median of 58.1%. Without significant growth in either the student population or in retail and office spaces, there is unlikely to be demand for new construction as the market appears to be efficient in its demand for number of rooms. As these hotels continue to age, though, this could present an opportunity for conversion to apartments.

Real Estate Market Opportunities

Understanding the retail, industrial, office, residential, and hospitality real estate market dynamics helps provide opportunities to see where greater efficiency can be had. Certain markets have lagged, such as retail and hotel, there are vacant and obsolete buildings, especially in retail, and industrial sectors, and other sectors have tight vacancy rates and room for expansion, such as office and residential.

Key real estate opportunities for the future of Veterans Parkway are found in the following table.

Figure 38: Key Real Estate Opportunities

Property Type	Opportunity
Retail	Redevelopment of the Eastland Mall. The mall’s significant vacancy, as well as national trends in this sector, point towards potential to redevelop Eastland Mall into something more appropriate for 2025, such as mixed-use development.
Retail	Market the vacant spaces. Many vacancies are not on the market, so work with brokers and owners to get more of the vacant spaces online and filled. Vacancy begets vacancy, especially for retail spaces.
Retail	Convert some Class B and C retail spaces to office spaces.
Industrial	New distribution development near I-55 ramps. While this is generally an unfavorable use near residential, clustering new logistics and transportation facilities near I-55 on-ramps is the most in-demand location for these facilities, helps steer clear of most residential uses, and offers the opportunity to build more export-oriented businesses on the Corridor and beyond.
Industrial	Existing vacant space could be repurposed. These historic spaces may not be appropriate for modern industrial uses, but could be repurposed as self storage, or low-cost light industrial maker space. Illinois State University could be a potential partner here, though it recently purchased office space on General Electric Road for their new engineering school.
Residential	Market-rate multifamily infill development. Whether wholly residential or mixed-use, which can mitigate risks for developers, this offers much needed housing, and, if mixed-use, builds in permanent support for retail and services located on site. This use would be appropriate on sites throughout the Corridor.
Residential	Affordable/workforce housing. The affordable housing available on the Corridor is highly limited and in high demand, despite a significant proportion of employment on Veterans Parkway being lower-paid service and retail jobs. Both naturally occurring and true workforce housing should be encouraged as future development types, either as standalone or as parts of mixed-use.
Office	Office conversions of other spaces. Look at Class B and C retail spaces, former industrial spaces, and other vacant or available spaces for high-quality office conversions.
Office	Build new office space. It’s likely the lack of available space in the market is limiting small- and medium-sized business growth. Additionally, new Class A space, whether new or renovated, is almost completely missing from the market as a product type. Any upcoming large vacancies would not meet this demand without significant construction costs.
Hospitality	Plan for future. There is not enough demand for new lodging options, nor any indication of imminent new demand drivers. However, some lodging facilities are aging and may require repurposing in the next decade, or could end up as a vacant eyesore.

Labor Market Findings

This section provides a comprehensive analysis of labor market dynamics in Bloomington-Normal, with a particular emphasis on the Veterans Parkway Corridor. A data-driven understanding of workforce composition, sectoral strengths, and spatial labor distribution is critical for identifying key opportunities to optimize real estate utilization, infrastructure investment, and economic development initiatives.

By examining employment patterns, industry specialization, and workforce mobility, this study will inform targeted upskilling strategies, spatial planning efficiencies, and long-term development frameworks. Furthermore, it will assess how the Veterans Parkway Corridor can capitalize on its established economic anchors, such as the insurance, retail, and medical industries, as well as expand newer growing industries like manufacturing, all while fostering a more adaptive and inclusive economy that maximizes opportunities for both residents and employers.

Industry on the Corridor is, unsurprisingly, dominated by State Farm, with Finance and Insurance jobs comprising 39.4% of jobs on the Corridor. This is followed by retail trade (12.9%), health care & social assistance (9.3%), accommodation & food services (9.2%), and manufacturing (9.1%). Amongst the largest industries are both a mix of higher-earning industries, like finance and insurance and manufacturing, as well as lower barrier to entry and lower earning industries such as healthcare & social assistance and accommodation & food services.

The industries which have seen the most growth over the last five years – which goes back pre-pandemic – include manufacturing (+2,616, likely due to Rivian and Bridgestone expansions), health care and social assistance (+452) and transportation and warehousing (+71). The rest have not exceeded pre-pandemic employment totals in a significant way.

Figure 39: Industrial Composition

Industry	Current		5-Year History	
	Employees	Avg Ann Wages	Empl Change	Ann %
Finance and Insurance	16,012	\$93,560	-630	-0.8%
Retail Trade	5,257	\$35,715	-454	-1.6%
Health Care & Social Assistance	3,786	\$55,913	452	2.6%
Accommodation & Food Services	3,732	\$24,091	-940	-4.4%
Manufacturing	3,713	\$78,900	2,616	27.6%
Business Support Services	2,146	\$43,513	-393	-3.3%
Professional, Scientific, & Technical Services	1,559	\$74,836	-121	-1.5%
Other Services	1,305	\$43,879	17	0.3%
Management of Companies & Enterprises	638	\$105,913	-259	-6.6%
Real Estate	538	\$49,939	41	1.6%
Arts, Entertainment, & Recreation	436	\$21,237	-46	-2.0%

Transportation & Warehousing	366	\$52,841	71	4.4%
Wholesale Trade	320	\$74,776	7	0.4%
Construction	297	\$65,095	7	0.5%
Educational Services	268	\$41,417	-87	-5.4%
Public Administration	122	\$59,915	-27	-3.9%
Information	80	\$68,138	-26	-5.6%
Utilities	69	\$129,561	6	1.7%
Total - All Industries	40,660	\$67,599	233	0.1%

Source: JobEQ. Data as of Q2 2024

Industry analysis is a good way to gauge what industries are growing, but to fully understand what type of work employees are doing in these industries, occupations should also be studied.

For Veterans Parkway, the largest occupation category is business and financial operations (6,634), office and administrative support (6,311), sales and related occupations (4,695) and management occupations (4,110). Of these, only management occupations have seen employment rise to pre-pandemic levels, gaining 421 jobs over the last five years. Other occupations with significant gains in employment were production occupations (+1,504), and healthcare support (+132).

Figure 40: Occupation Data for Veterans Parkway Corridor – 500+ Employees

Occupation	Current			5-Year History	
	Employment	Mean Ann Wages	Unempl Rate	Empl Change	Ann %
Business and Financial Operations Occupations	6,634	\$86,300	2.8%	-109	-0.3%
Office and Administrative Support Occupations	6,311	\$48,300	3.8%	-993	-2.9%
Sales and Related Occupations	4,695	\$52,800	5.2%	-345	-1.4%
Management Occupations	4,110	\$122,400	2.0%	421	2.2%
Food Preparation and Serving Related Occupations	3,446	\$34,200	6.8%	-872	-4.4%
Production Occupations	2,640	\$48,700	5.3%	1,504	18.4%
Transportation and Material Moving Occupations	2,269	\$47,000	7.5%	116	1.1%
Computer and Mathematical Occupations	2,145	\$107,100	2.5%	11	0.1%
Healthcare Practitioners and Technical Occupations	1,498	\$102,900	1.6%	79	1.1%

Building and Grounds Cleaning and Maintenance Occupations	1,084	\$39,400	6.3%	49	0.9%
Healthcare Support Occupations	980	\$38,300	4.1%	177	4.1%
Installation, Maintenance, and Repair Occupations	944	\$60,000	3.0%	105	2.4%
Legal Occupations	830	\$93,900	1.6%	-13	-0.3%
Personal Care and Service Occupations	657	\$38,600	5.3%	-14	-0.4%
Total - All Occupations	40,660	\$65,200	4.1%	233	0.1%

Source: JobsEQ. Data as of 2024.

This occupational analysis gives an idea of what employees are qualified to do, and where there are disconnects between industry needs and employee qualifications. Within industries with lower barriers to entry, such as manufacturing, food preparation and serving, and healthcare, local decisionmakers should be looking in particular for upskilling opportunities. There are indicators where practical training or a new award, such as a food handling certification, could open economic opportunities for entry level workers, as seen in the following table, which combines skills gap analyses for manufacturing, healthcare, retail, and food service and accommodation. These skills are across a variety of occupations and industries, but the gap shows the number of job openings compared to candidates that have these skills, exhibiting opportunity to meet demand in the market.

Figure 41: Skill Gaps in McLean County for Low Barrier to Entry Industries

Skill	Candidates	Openings	Gap
	#	#	#
Manufacturing	99	231	-132
Ability to Lift 51-100 lbs.	26	147	-121
Retail Sales	100	213	-113
Hospitality	72	157	-85
Assembly	7	79	-72
Microsoft Outlook	211	274	-63
Forklifts	93	155	-62
Microsoft Office	517	573	-56
Marketing	69	122	-53
Cash Handling (Cashier)	103	151	-48
Power Tools	5	48	-42
Hand Tools	0	37	-37
Cash Registers	41	64	-24
Food Safety	4	26	-22
Blueprint Reading	5	27	-21

Source: JobsEQ. Data as of Q2 2024.

This points to a need for training, both formal programs and on the job training, for blue-collar, service industry, and entry-level office jobs, if Bloomington-Normal is going to make its economy as efficient and equitable as possible. These training programs could be through local community colleges like Heartland, through other more specialized training programs, or through programming at the high school level. As for surplus occupational qualifications in the workforce, the largest oversupply is found in education, healthcare, and with accountants.

A point to remember when discussing upskilling is the significant income growth that comes with extra training. For some of the lowest earners, like retail salespersons and fast-food counter workers, upskilling can be both an approachable next step in a career as well as a significant jump in earnings. Using labor data provider JobsEQ, it is possible to calculate the attribute gap between one occupation and related occupations. For this analysis, two of the most common yet low-paid industries along Veterans Parkway were targeted: retail salespersons and fast-food counter workers.

Figure 42: Alternative Occupations for Retail Salespersons – McLean County

Occupation Title	Attribute Gap	Current Empl	Unempl Rate	Avg. Annual Wages	10-Year Total Demand
Door-to-Door Sales Workers, News and Street Vendors, and Related Workers	7.0%	12	6.3%	\$41,700	12
Counter and Rental Clerks	9.8%	210	1.7%	\$40,600	225
Merchandise Displayers and Window Trimmers	9.8%	48	5.3%	\$38,200	49
Parts Salespersons	11.2%	111	0.9%	\$40,600	113
Demonstrators and Product Promoters	12.1%	13	11.9%	\$41,400	23
Insurance Underwriters	13.3%	1,313	0.4%	\$83,300	711
New Accounts Clerks	15.7%	17	7.3%	\$39,400	9
Insurance Sales Agents	17.4%	1,250	3.7%	\$88,300	901
Wholesale and Retail Buyers, Except Farm Products	19.8%	54	4.0%	\$85,100	56
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	21.9%	457	1.4%	\$71,000	350
Opticians, Dispensing	24.2%	47	0.7%	\$40,700	38
Advertising Sales Agents	24.5%	17	4.2%	\$67,500	14
Fundraisers	25.8%	57	8.8%	\$65,500	41
Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	26.1%	45	1.4%	\$117,500	35
Sales Managers	29.8%	395	1.5%	\$133,600	280

Market Research Analysts and Marketing Specialists	29.8%	461	6.5%	\$76,900	389
Photographers	30.3%	59	3.2%	\$45,100	51
Real Estate Brokers	30.8%	37	2.4%	\$85,100	27
Advertising and Promotions Managers	31.1%	5	4.6%	\$107,100	3
Marketing Managers	32.9%	282	3.8%	\$138,700	215
Real Estate Sales Agents	34.1%	130	2.4%	\$43,700	98

Source: JobsEQ. Data as of Q2 2024.

What Figure 42 shows is the occupations that retail salespersons could most easily fit into, with the least amount of training needed located at the top and more intensive training located at the bottom. While some of these earnings totals are not significantly higher than current earnings for this field, as the attribute gap grows from smallest to largest, so do earnings, with some upskilling opportunities offering six figure salaries.

Figure 43: Alternative Occupations for Fast Food and Counter Workers – McLean County

Occupation Title	Attribute Gap	Current Empl	Unempl Rate	Avg. Annual Wages	10-Year Total Demand
Food Preparation Workers	5.7%	575	6.9%	\$32,700	927
Dining Room and Cafeteria Attendants and Bartender Helpers	5.7%	293	9.8%	\$31,800	548
Waiters and Waitresses	6.1%	1,428	6.7%	\$33,900	2,770
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	7.3%	241	5.4%	\$30,800	574
Cashiers	8.0%	1,888	9.5%	\$31,000	3,019
Amusement and Recreation Attendants	10.5%	153	10.4%	\$33,900	412
Ushers, Lobby Attendants, and Ticket Takers	11.4%	32	13.7%	\$33,900	87
Butchers and Meat Cutters	11.9%	83	6.2%	\$36,200	86
Cooks, Short Order	12.3%	48	7.0%	\$33,300	63
Driver/Sales Workers	16.3%	250	4.8%	\$40,200	262
Food Servers, Nonrestaurant	16.3%	179	5.1%	\$33,600	308
Demonstrators and Product Promoters	17.5%	13	11.9%	\$41,400	23
Cooks, Restaurant	17.7%	904	7.4%	\$34,900	1,513
Cooks, Private Household	18.5%	12	6.5%	\$49,400	16
Bartenders	18.6%	494	5.1%	\$35,300	838
Cooks, Institution and Cafeteria	19.5%	284	7.3%	\$37,700	414

First-Line Supervisors of Food Preparation and Serving Workers	28.9%	724	3.9%	\$41,800	1,030
First-Line Supervisors of Retail Sales Workers	30.4%	720	2.9%	\$53,400	556
Food Service Managers	34.0%	224	3.5%	\$60,700	241
Dietetic Technicians	39.0%	6	5.9%	\$39,200	7

Source: JobsEQ. Data as of Q2 2024.

Similarly, within fast-food counter workers, opportunities exist for both official and on the job training opportunities to upskill some of the Bloomington-Normal workforces lowest-paid workers into greater opportunities. Understanding the route to higher earnings and more equity for employees is an important tool for the local economic development toolboxes.

For the purposes of this study, these findings would materialize on Veterans Parkway by anchoring new mixed-use developments with these training uses, or finding opportunities to site a standalone training site along the Corridor. Additionally, it is imperative to understand that despite modest industrial and office real estate markets, there is a need for trained employees to fill these roles, and that the lack of new construction could hold back business growth and entrepreneurship.

Key human capital opportunities for the future of Veterans Parkway are found in the following table.

Figure 44: Key Labor Market Opportunities

Industry / Occupation	Opportunity
Manufacturing / Transportation	Build out manufacturing and transportation industry. One of the fastest growing industries on the Corridor, an effort should be made to capitalize on the existing manufacturing labor and the Corridor’s connections to I-55, and training programs should be expanded, or potentially sited, on and around the Corridor. This strengthens the export-oriented economy.
Office	Expand office labor pool beyond State Farm. Office-using occupations are copious on the Corridor. New and updated office space will likely lead to business growth, and supplying this growth with the necessary talent through certificate programs can help grow the economy.
Retail / Food Service	Create upskilling opportunities for retail and food service workers. These are two of the largest and lowest-paid groups of employees on the Corridor. Creating accessible training programs to move employees up the economic ladder in these fields would have significant economic impacts. Partners could include local businesses, business groups, or educational institutions.
Medical	Expansion of medical industry. Both industry and occupation data points to this as an opportunity. Despite an existing supply of certain types of medical professionals, there is a gap for licensed practical and vocational nurses, in particular, and this field has consistently offered itself as an economic ladder with a lower barrier to entry than other fields.

Anchor new mixed-use developments with job training facility or light industrial.
 General These programs often struggle with funding but can have immense return on investment, so offering new space at a discount in a new development and anchoring a new development could be an important step towards creating a more equitable and robust economy.

Ensure the future of Veterans Parkway is spatially efficient. With such a high concentration of low-income employees on the Corridor, ensuring job access is available to all residents will be imperative to the future of the Corridor and growing the Bloomington-Normal economy. This can come in the form of significantly enhanced bike infrastructure and transit options.

Conclusion

The Veterans Parkway real estate market analysis reveals a retail sector showing vulnerability on a Corridor that has not seen vulnerability in this sector. This is especially true within shopping centers, with a 17.3% vacancy rate almost primarily driven by Eastland Mall’s decline. Even outside of Eastland Mall, though, retail rents have stagnated since 2007, and new commercial developments on traditionally retail-oriented land have leaned toward low-employment uses like self-storage and car washes. In a similar fashion to the top-heavy nature of retail, industrial vacancies are mostly concentrated in the 295,000-square-foot General Electric building. Industrial development trends diverge from national patterns, with no large-scale buildings constructed since 2000, despite strong manufacturing job growth. The location of the GE building makes new construction difficult, so renovating offers the clearest path to reuse.

Office and residential markets remain stable with very high occupancy rates, presenting opportunities for new development in those sectors. Meanwhile, office space demand has remained steady, contrasting with national trends of declining occupancy, and residential vacancy is below the ideal 7%, indicating a tight housing market leading to rising rents.

A running theme throughout these analyses, as well as through the transportation analyses, is the disconnect between the lowest earners and where job growth has occurred. To illustrate this, Figure 45 shows the location of Justice 40 communities (by census tract) and the largest employers along Veterans Parkway. The white outline is a half-mile buffer around the parkway. The red and darker blue areas are census blocks that showed statistical significance of clustering in employment change when run through a Hot Spot analysis (Getis-Ord Gi). The colors represent statistically significant (with a confidence at least 90%) clusters of job growth (Blue) and job loss (Red) between 2002 and 2022.

The labor market analysis highlights the dominance of finance and insurance jobs (39.4% of employment), primarily due to State Farm, followed by retail, healthcare, and manufacturing. Manufacturing has experienced the most significant growth, adding 2,616 jobs since 2019. The study identifies a need for upskilling programs, particularly in blue-collar and service industries, to enhance workforce mobility and economic efficiency.

Occupation data suggests a surplus of education, healthcare, and accounting professionals, while industries like retail and food service could benefit from targeted training to increase earning potential for those employees. By leveraging existing economic anchors and fostering industry diversification, the Veterans Parkway Corridor can create a more adaptive and inclusive economy that supports long-term regional growth and more equitable outcomes for all residents.

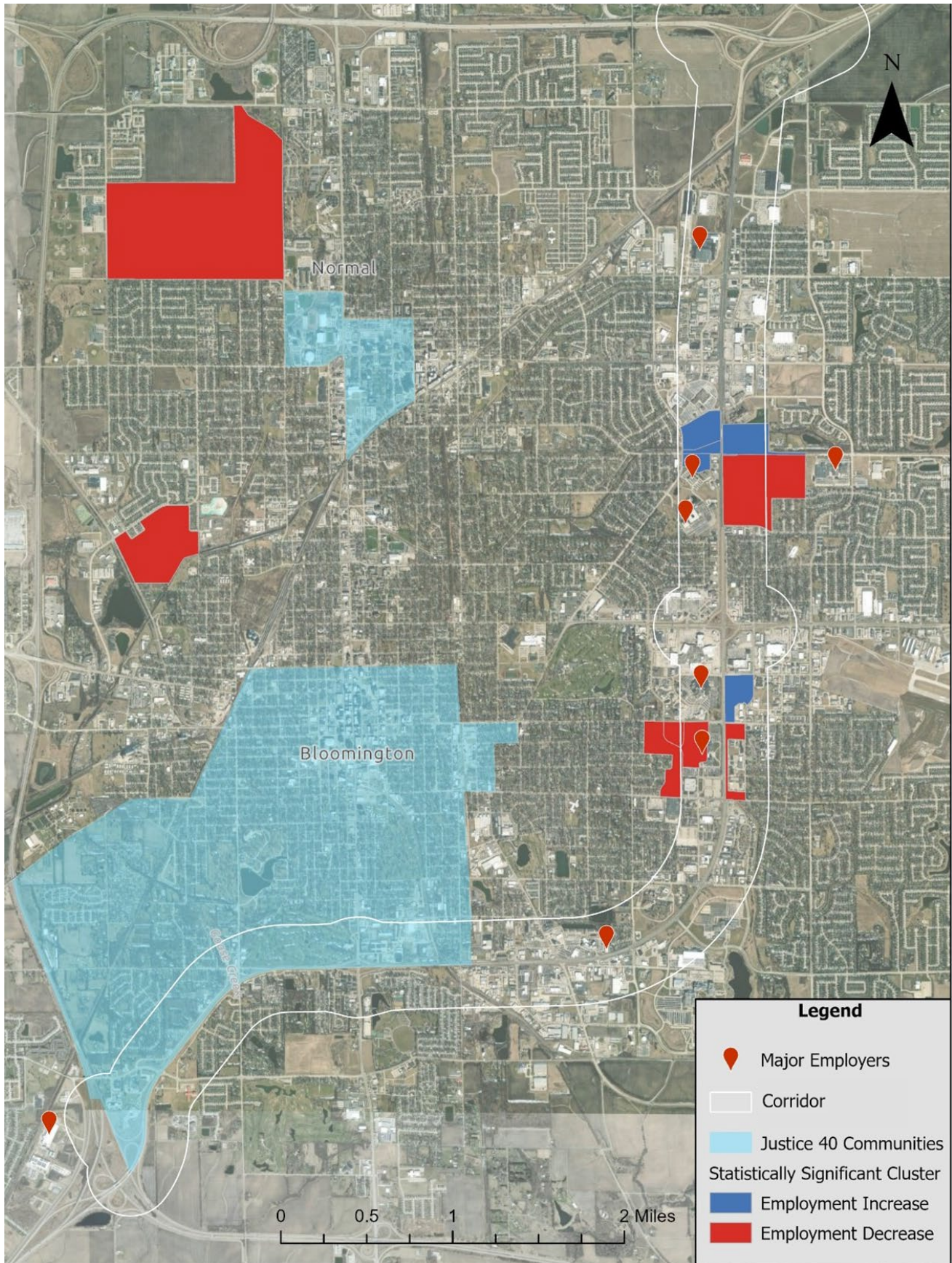


Figure 45: Justice 40 communities and largest employers along Veterans Parkway

Overall, these two analyses dovetail well and, when taken with the prior land use study, further show the pivotal point Veterans Parkway is facing in its history, with an opportunity to reinvent itself as a more equitable and balanced Corridor that can feed into the regional economy in a new, more diverse way. Future developments must be cognizant of and geared towards the needs and opportunities found in these studies, including the significant demand for new residential, preferably in mixed-use developments anchored by institutional users like job training programs or Class A office space. Reimagining how to market and build out existing vacancies like those seen at the Eastland Mall and the General Electric building can offer opportunity for business growth. Lastly, local groups should work together with industry to identify upskilling opportunities to create economic mobility for lower-earning residents. As a whole, changing the identity of Veterans Parkway from one that is solely focused on retail to one that is more diverse, safe, and offers more economic opportunity will be transformative for the regional economy.

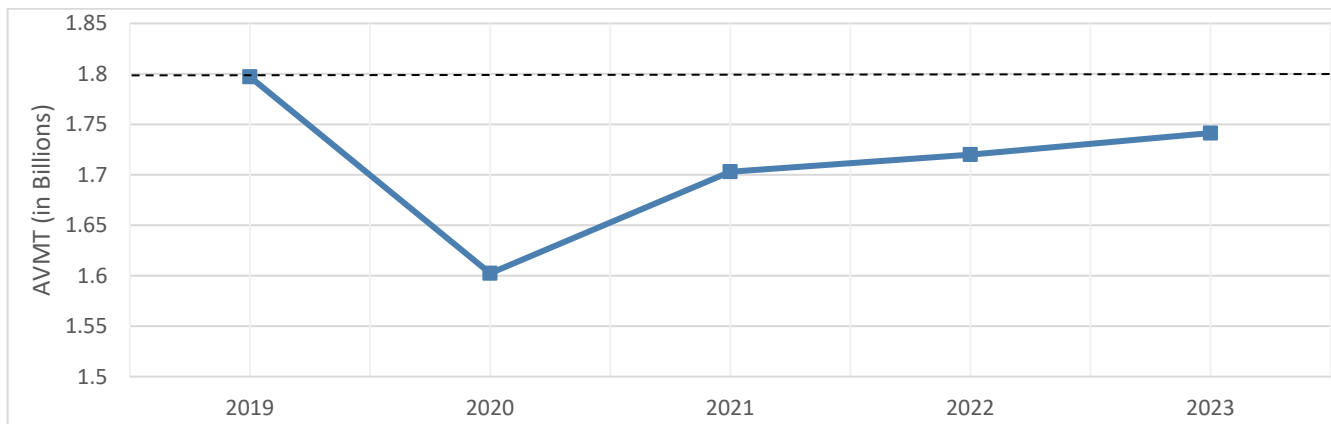
Post-COVID Impact Analysis

Daily Vehicular Volume Trends

At the onset of the COVID-19 pandemic in early 2020, widespread shelter-in-place and work-from-home conditions led to dramatically reduced Vehicle Miles Traveled (VMT) in the United States. Between April 2019 and April 2020, total VMT on all roads within the United States declined by nearly 40%, according to the Federal Highway Administration (FHWA).²⁷ Since that time, vehicular travel has rebounded with the loosening of travel restrictions and increasing return-to-office trends. Nationwide, the total VMT in 2022 was back to within 2% of pre-pandemic (2019) levels.²⁸ According to StreetLight, a third-party traffic data aggregator, this rebound in traffic is distributed unevenly between urban and suburban locations. In 2021, VMT in the downtowns of the largest cities remained down by approximately 27%, while VMT in the greater metros of those same cities was above pre-pandemic levels.²⁹

Referencing the 2023 *Illinois Travel Statistics* report published by IDOT, volumes in McLean County have generally rebounded in a similar fashion to national trends. Annual Vehicle Miles Traveled (AVMT) in the County decreased to 11% below 2019 levels in 2020. Since that time, AVMT has increased in every following year, with 2023 values within approximately 3% of 2019 values, as shown in Figure 46.

Figure 46: Annual Vehicle Miles Traveled: McLean County



Source: IDOT 2023 *Illinois Travel Statistics*

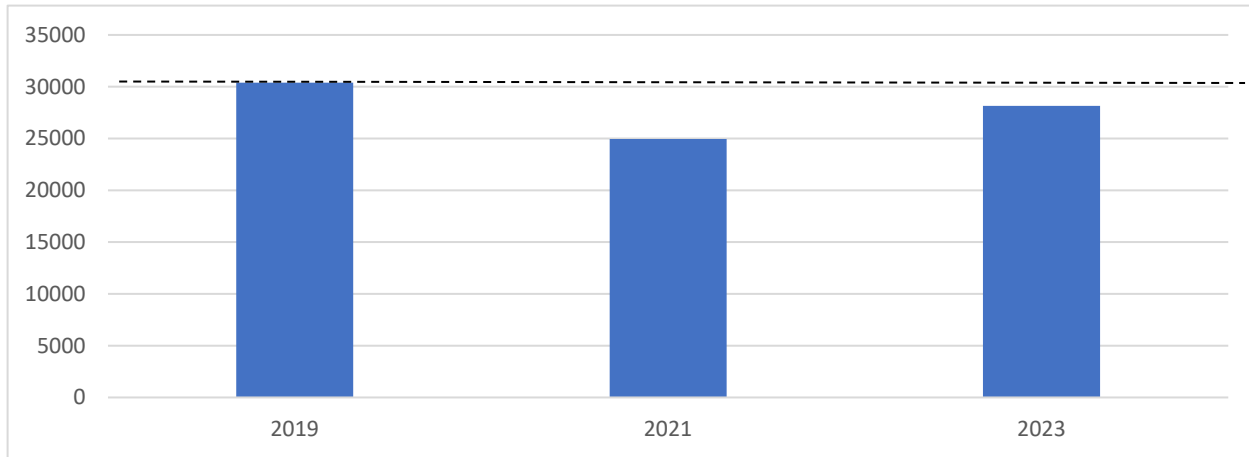
²⁷ https://www.fhwa.dot.gov/policyinformation/travel_monitoring/20aprtvt/

²⁸ <https://www.fhwa.dot.gov/policyinformation/statistics/2022/vmt421c.cfm>

²⁹ StreetLightdata.com, Downtown Congestion Post-COVID

IDOT Traffic Count Data Base System (TCDS) Annual Average Daily Traffic (AADT) data for count stations on Veterans Parkway show similar trends. Based on average daily counts from 22 count locations along the corridor, 2021 volumes declined to 18% lower than 2019 equivalents before rebounding to 7% lower in 2023, as shown in Figure 47. While volumes have not reached pre-pandemic levels, historical IDOT data for Veterans Parkway and McLean County at large show daily volumes increasing since their respective pandemic low points.

Figure 47. Historical IDOT AADT: Veterans Parkway



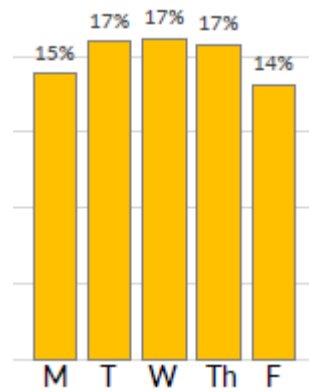
Source: IDOT TCDS

Weekly and Hourly Vehicular Volume Trends

In addition to changing the total number of vehicles on roadways, data suggests that the pandemic has had effects on the distribution of vehicular traffic throughout the week and day. Even before the pandemic, weekdays adjoining the weekend (Monday and Friday) have historically experienced differing travel patterns compared to midweek days (Tuesday, Wednesday, Thursday). With the increased prevalence of hybrid work schedules, in-person work has been concentrated most in those midweek days. However, based on research from the third-party data aggregator INRIX, 2024 saw Mondays and Fridays pulling closer to an even share of weekly trips even in a sampling of the 10 largest North American city cores. This may indicate that an increasing number of workers are returning to full five-day in-person work schedules.

When downtown workers attend work in-person, research by StreetLight suggests that they are traveling later in the day.³⁰ This trend was observed near Veterans Parkway based on 2019 and 2023 Replica data for auto drivers and passengers, as depicted in Figure 48. As shown, relative to pre-pandemic conditions, Veterans Parkway-adjacent trips in 2023 consistently represented a lower percentage of total daily trips in the morning and early afternoon peak periods and consistently higher in the late afternoon and evening peak periods. In 2019, 10 hours throughout an average day exceeded 6% of daily traffic volumes, compared to only 6 in 2023. Similarly, only 2 hours in 2019 exceeded 8% of total daily traffic, compared to 4 in 2023. This shift indicates that relative to 2019, traffic is more concentrated in the evening peak hours. As such, planning future roadway geometry and signal timings to

Figure 48: Percent of Weekly Traffic by Day

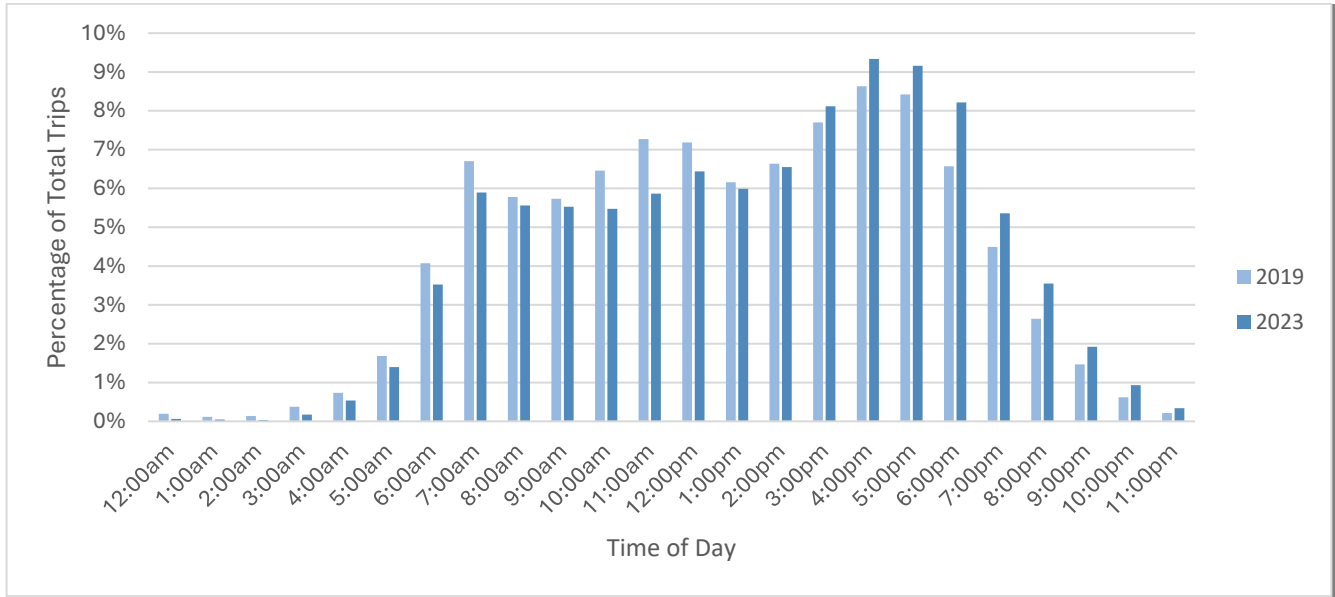


Source: INRIX

³⁰ StreetLightdata.com, Downtown Congestion Post-COVID

accommodate evening peak traffic would represent designing for an even smaller percentage of total daily traffic than in the past.

Figure 49: Veterans Parkway Vehicular Trips by Start Time

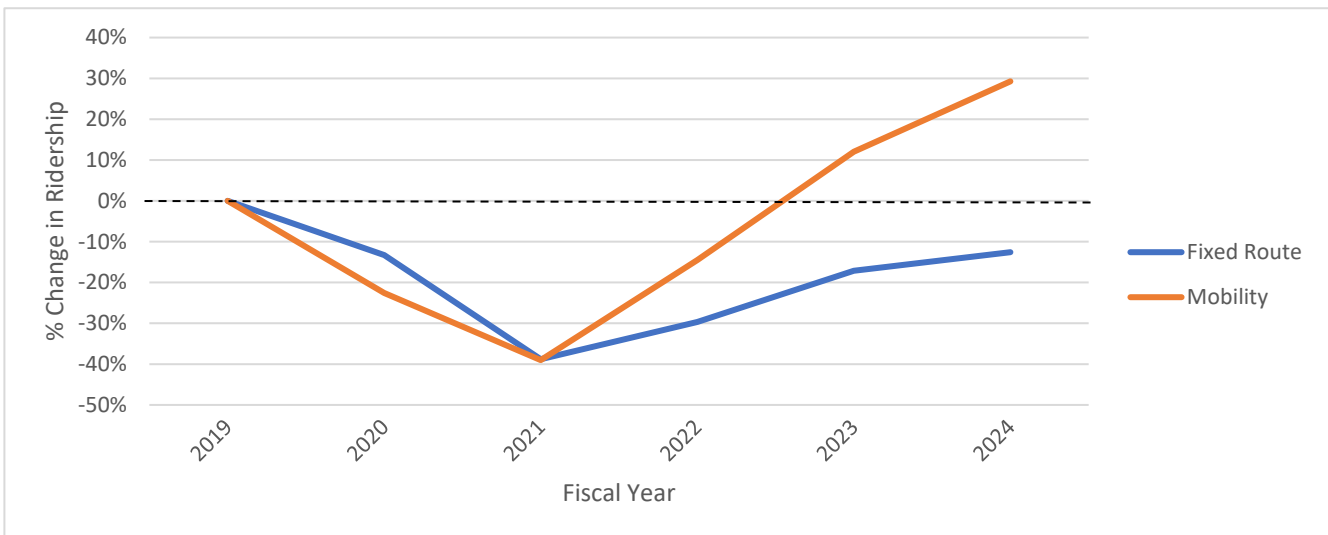


Source: Replica

Mode Share Trends

During the pandemic, transit ridership was impacted by many of the same factors as vehicular travel, leading to an overall reduction in ridership in 2020 and 2021. Based on ridership data provided by Connect Transit, fixed route and mobility (shared-ride service) ridership declined as low as 39 percent below pre-pandemic conditions in 2021, as shown in Figure 50.

Figure 50: Connect Transit Ridership Over Time

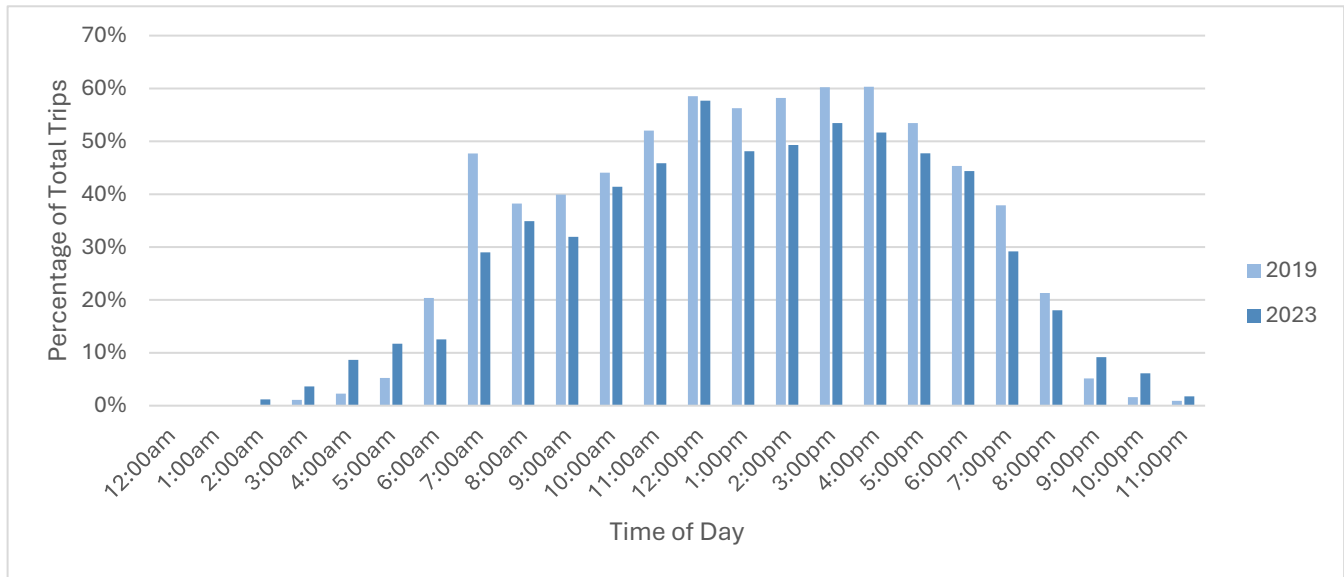


Source: Connect Transit

Since that time, ridership for both services has increased each year, with 2024 ridership within 13 percent of pre-pandemic conditions for fixed route service, and exceeding 2019 conditions by 29 percent for mobility service. The strong rebound in mobility ridership is likely related to several 2021 initiatives, including a “one fare for all” policy which reduced and standardized fares and the expansion of the service area to the City of Bloomington and Town of Normal borders.

A Replica analysis of trips throughout a typical weekday shows that McLean County transit riders have also shifted the times at which they travel relative to pre-pandemic conditions. As shown in Figure 51, the relative frequency of trips taking place during early morning (before 6:00AM) and late evening (after 8:00PM) has risen compared to pre-pandemic conditions. Conversely, a smaller percentage of trips are occurring during the middle of the day, particularly during the morning peak period.

Figure 51: McLean County Transit Trips by Start Time



Source: Replica

Reduced transit ridership combined with shifting time of day preferences may create opportunities to more efficiently serve transit users. As the project continues, the shifting needs of transit users will inform design alternatives and the toolkit of intersection design best practices.

Appendix A

Project Steering Committee

Name	Representation/Affiliation	Alternate
Andrew Kiefaber	Federal Transit Administration	
Todd Schmidt	Federal Highway Administration	
Brian Hogan	Illinois Department of Transportation District 5	
Carl Olson	Central Illinois Regional Airport	
Carl Teichman	Bloomington-Normal Economic Development Council	
Charlie Moore	McLean County Chamber of Commerce	Tyler Cravens
Damon Kelly	State Farm Insurance	
David Braun	Connect Transit	
Erin Kennedy	OSF Healthcare	
Jerry Stokes	McLean County Highway Department	Luke Hohulin
Jon Branham	City of Bloomington Development Services Department	
Kevin Jackson	Bloomington-Normal National Association for the Advancement of Colored People (NAACP)	
Kevin Kothe	City of Bloomington Operations and Engineering Services	
Patrick Dullard	Friends of the Constitution Trail	Bill Wasson
Philip Dick	McLean County Department of Building & Zoning	
Raymond Lai	McLean County Regional Planning Commission (MCRPC)	
Robert Innis	Illinois Department of Transportation Bureau of Planning	
Tessa Ferraro	Town of Normal Planning & Zoning	
Zachary Wall	Town of Normal Public Works and Engineering	

Land Use Analysis: Definitions

- **Low-density residential** consists of residential developments zoned for and featuring 13 units/acre or less. These building typologies are single family detached homes, single family attached homes (townhomes), and other multi-unit structures with individual unit entrances.
- **Higher-density residential** includes all multiple-unit residential buildings with a common area, as well as two-flats, three-flats, condominiums, and senior housing developments. This includes developments across the affordability spectrum.
- **Commercial includes** retail, services, and office, with buildings ranging from small, standalone buildings up to large-scale shopping centers and malls.
- **Industrial** includes large and small manufacturing centers, transportation, distribution, and logistics (TDL) sites, materials storage, and other warehousing uses.
- **Institutional** uses include educational facilities, governmental uses ranging from local to federal uses, cemeteries, and religious institutions.
- **Open space** includes parks, golf courses, and any preservation land. Any formalized outdoor recreational space, either active or passive.
- **Agricultural** uses include parcels where land is dominated by row crops, field crops, pasture, animal or plant processing, and other large-scale agricultural uses.
- **Transportation/utilities** includes transportation-related activities separate from right-of-way parcels, such as maintenance yards and freight terminals. It also includes parcels used by utilities and communications infrastructure, waste facilities, and stormwater management infrastructure.
- **Vacant** includes vacant and undeveloped land, or land with an out of use building that will likely be demolished for a new use in the future.