The Framework Plan in Chapter 4 summarizes commercial development typologies that comprise a variety of retail businesses, services, and restaurants to provide goods and services from national and regional brands, entrepreneurs, and small business owners alike. Commercial development is illustrated on the Future Land Use Plan Map in Chapter 5. The retail market analysis in this chapter advances these typologies by recommending strategies and policies that should be considered when implementing the 2020 Comprehensive Plan Update.

This chapter summarizes an analysis of the retail market in Homer Glen, including an assessment of existing businesses and the potential for new business types to attract. Homer Glen has generally focused retail along its three primary retail corridors: 143rd Street, 159th Street, and Bell Road. Moreover, the Village has made strides in recent years to improve these three roadways to enhance safety, mobility, and accessibility for all a multimodal set of users. This benefits residents, workers, and visitors alike who seek goods and services to meet their daily needs.

As presented in this chapter, there are opportunities to add to Homer Glen’s business mix, particularly for goods and services that are not presently offered in the Village. While the addition of new retail options helps to diversify local offerings and strengthen the tax base, the Framework Plan in Chapter 4 and Future Land Use Plan in Chapter 5 are carefully formulated to strategically distribute retail around Homer Glen without over-saturating the market with too much retail, which can lead to turnover and unnecessary vacancies.

Retail recommendations also include insights into how the Village can proactively respond to the impacts of COVID-19, particularly assessing how different business types may adjust how they design their spaces and interface with customers in-person and online.
RETAIL MARKET ANALYSIS
The retail market analysis primarily focuses on retail spending and retail potential in Homer Glen. In addition, the retail market analysis is supplemented by three additional components that lay the groundwork for recommendations that support the Village’s economic development decisions:

- **Business Gaps and Surplus Analysis** analyzes the existing retail environment on a sub-industry level to identify new opportunities for business investment in the Village. This analysis compares the Village’s businesses to those within a 10-mile radius and identifies gaps and surpluses that could be better addressed by concerted economic development efforts.

- **Industry Clustering Analysis** that identifies clustering opportunities that could be utilized to better target business attraction and relocation efforts.

- **COVID-19 recommendations** that react proactively to the fluid coronavirus crisis by covering planning, economic development, and public health responses to the pandemic with particular focus on supporting and expanding the business community. As a bedroom community, Homer Glen is well positioned to adjust to the post-crisis world. Its balance of natural assets combined with suburban amenities is perfect for attracting a wide variety of future residents and businesses to the Village.

PRIMARY RETAIL CORRIDORS
As illustrated in Figure 7.1, Homer Glen has three primary retail corridors: 143rd Street, 159th Street, and Bell Road. Currently, Bell Road is the Village’s most heavily developed retail corridor. However, 159th Street has the potential to become Homer Glen’s economic engine in the future, particularly with the Future Land Use Plan characterizing 159th Street as a mixed use corridor.

The Business Gaps and Surplus Analysis provides a detailed review of the businesses within Homer Glen in comparison to the Secondary Market Area (10-mile radius surrounding the Village) and identified opportunities for future business attraction with a heavy focus on retail attraction.
Retail development along 143rd Street will generally concentrate at major intersections including Bell Road as the main node and limited retail at Lemont Road to capitalize on access to I-355.

Bell Road will continue to be one of Homer Glen’s major retail corridors, particularly building up major intersections and adding more retail opportunities through mixed use development.

159th Street has the potential to become the economic engine of Homer Glen, particularly capitalizing on major infrastructure improvements and building upon its capacity to become a major mixed use corridor. Mixed use would position 159th Street to provide the residents and daytime office population to support greater investments in retail development.
BUSINESS GAPS & SURPLUS ANALYSIS

The Business Gaps and Surplus Analysis evaluated the existing businesses in Homer Glen and compared them to similar businesses within the 10-mile radius Secondary Market Area to determine which business categories, if any, are currently experiencing a surplus (i.e., the supply of goods or services exceeds the demand). Additionally, a comparison of businesses within the Secondary Market Area identified whether there are any gaps (i.e., opportunities for new businesses) in Homer Glen that could be better addressed with concentrated business attraction and relocation strategies.

RETAIL LEAKAGE

According to a Leakage/Surplus Analysis based on recent data from Esri Community Analyst, Homer Glen is experiencing a high percentage of retail leakage (i.e., residents traveling outside the community to spend money on goods and services elsewhere) in comparison to other towns throughout the Chicagoland area. Every other major retail industry group is experiencing leakage to neighboring towns in the region. Moreover, Homer Glen is experiencing 100% leakage in seven industry groups highlighted in yellow in the graph in Figure 7.2 below.

RETAIL SURPLUS

The Village is only experiencing a surplus in four types of retail: (1) Grocery Stores; (2) Building Materials and Supplies Dealers; (3) Special Food Services; and (4) Beer, Wine, and Liquor Stores.

Most of these industry groups have been dominated by e-commerce, namely Amazon, which suggests that the leakage is less likely to be reversed by attracting new businesses in those industries. However, there is a strong case to be made for attracting development from the following industry groups: Health & Office Supplies (97% leakage); Gas Stations (83% leakage); Personal Care Stores (73% leakage); and Restaurants (37% leakage).
BUSINESS ATTRACTION

A “Void Analysis” identifies opportunities for business attraction and relocation in Homer Glen (i.e., the Primary Market Area) by analyzing businesses within a 10-mile radius of the Village (i.e., the Secondary Market Area) to determine which businesses and industries are prevalent in the area that may be lacking within the municipal boundaries.

VOID ANALYSIS

This analysis is a more detailed continuation of the previous Surplus-Leakage Analysis, as it identified businesses at a sub-industry level and provides greater clarity regarding the types of business opportunities that are currently missing entirely from Homer Glen.

When a large number of businesses are located just outside of the Village’s boundaries even though there are no businesses within a particular sub-industry within the Village, this warrants a closer look as to why those businesses are not represented in Homer Glen. This is impacted by a variety of aspects such as lack of residential density, low population growth, limited daytime population, fair traffic counts, and personal choices as to where people spend their money.

The Comprehensive Plan outlines ways the Village can be more attractive to potential retailers and investment. In particular, the Framework Plan in Chapter 4, Future Land Use Plan in Chapter 5, and housing strategies in Chapter 6 address how the Village can expand its housing supply and diversify housing options to enhance residential density and boost population. The provision of employment opportunities through office/business parks and healthcare will help generate greater daytime population to support new shops, restaurants, and services. Mixed use development, particularly along 159th Street, provides opportunities for these retail stores, restaurants, services, and other businesses to locate in close proximity to residents and office workers.

SUMMARY OF FINDINGS

Within a 10-mile radius of Homer Glen’s municipal boundaries, there are:

- 13 shopping centers
- 3 wholesale clubs
- 5 beer specialty stores
- 19 entertainment uses (e.g., theaters, concert venues, etc.)

However, there are zero existing businesses in those same categories within Homer Glen.

Additionally, the Village is severely underrepresented in the six business types identified in the graphic below. The underrepresentation of these businesses makes it clear that there is a considerable opportunity for the Village to attract businesses in these categories, which would stem the outflow of expenditures by Homer Glen residents to nearby towns. Keeping more money within Homer Glen’s boundaries will increase revenue to local businesses and increase tax revenue to support future capital investments.

Business categories to invest future business attraction efforts in Homer Glen (from left to right): (1) Automotive; (2) Pet Shops and Pet Care; (3) Recreation, including art galleries, amusement parks, and health clubs; (4) Budget Retail Stores; (5) Grocery Stores; (6) Financial Planning Businesses

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2 The Appendix provides a more detailed summary, including maps and charts, of the Void and Gap Analysis that compares the existing businesses for each sub-industry in Homer Glen to those in the Secondary Market.
INDUSTRY CLUSTERING ANALYSIS

While the previous section compared the existing businesses in Homer Glen to other businesses within a 10-mile radius, larger industry trends were also evaluated at a regional level. The following analysis determined if there are any regional industry clustering opportunities that Homer Glen has not previously identified by comparing existing businesses in the Village to businesses within the three counties immediately surrounding Homer Glen: Will County, DuPage County, and Cook County. Figure 7.3 summarizes the four industry clustering opportunities in Homer Glen.

Since each of these industries have very few businesses in the Village, Homer Glen is well-suited for the following four sub-industries that sit within a larger industry cluster: (1) Construction of buildings; (2) Specialty trade contractors; (3) Professional, scientific, and technical services; and (4) Repair and maintenance.

### FIGURE 7.3

**INDUSTRY CLUSTERING OPPORTUNITIES**

Sources: Retail Market Data Sources: U.S. Census data utilizing Esri Community Analyst, Retail Leakage Surplus Analysis, 2017.

<table>
<thead>
<tr>
<th>NAICS 3-DIGIT CODE</th>
<th>NAICS DESCRIPTION</th>
<th>BUSINESSES IN HOMER GLEN</th>
<th>BUSINESSES WITHIN 30-MIN DRIVE OF HOMER GLEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>236</td>
<td>Construction of Buildings</td>
<td>3</td>
<td>71</td>
</tr>
<tr>
<td>238</td>
<td>Specialty Trade Contractors</td>
<td>5</td>
<td>256</td>
</tr>
<tr>
<td>541</td>
<td>Professional, Scientific, and Technical Services</td>
<td>0</td>
<td>292</td>
</tr>
<tr>
<td>811</td>
<td>Repair and Maintenance</td>
<td>0</td>
<td>282</td>
</tr>
</tbody>
</table>

**SPORTS & RECREATION**

Homer Glen and neighboring communities in Will and Cook Counties have a large number of sports, recreational, and athletic facilities. These include: gyms; health clubs; spas; youth athletics facilities; baseball training facilities; and domed athletic facilities. While the existing demand for these facilities seems to have been met, there are two opportunities for additional athletic facilities: (1) additional youth indoor facilities for recreational sports that serve in a childcare capacity, similar to daycares but with a sports focus; and (2) large-scale regional athletic facilities aimed primarily towards attracting youth and teenagers to compete in national athletic competitions, such as gymnastics, baseball, football, basketball, soccer, lacrosse, hockey, and figure skating. The Village recently commissioned a large-scale study on regional athletic facilities that confirms that there is potential for a regional sports complex that would draw from multiple counties in the region.
HEALTHCARE FACILITIES
There are several existing hospitals, medical centers, and other healthcare facilities within the Primary and Secondary Market Areas. Dialysis centers are becoming more prevalent throughout the country, with the Dialysis Care Center Corporate Headquarters opening in Homer Glen in 2019. There will continue to be immediate demand for these centers in proximity to residential populations.

The existing larger-scale healthcare facilities serve the existing population of Homer Glen; however, there are additional opportunities for new healthcare developments:

- Expansion of existing healthcare-related uses to serve Homer Glen’s increasing population of seniors.
- Research and development (R&D) in the life sciences and healthcare industries to support existing medical facilities in the region and serve as key job creators for the Village.

While the COVID-19 public health crisis and the subsequent restrictions have raised significant concerns regarding economic vibrancy in the short- to medium-term, market fundamentals will likely return within a few years with some notable changes, as described below.

In general, capital-rich companies have money available to invest in larger projects: senior housing with shopping, gated communities, and mixed use developments like the Glen Town Center in Glenview. There may be greater focus on personal transportation choices, as opposed to public transit and on-demand car sharing.

More emphasis will be placed on resiliency strategies that better respond to a crisis, such as phased closures and openings that occurred across Illinois in Spring and Summer 2020, respectively. Since the COVID-19 pandemic remains a dynamic situation at the time of preparation of this chapter, the ideas expressed below also maintain a similar sense of fluidity to adapt to other changes in the market, crisis management, and responses by governmental bodies, investors, property owners, developers, and builders.

RETAIL » A contraction in retailing is anticipated, which was already underway for larger stores. This suggests the need to create environments for smaller store formats to survive, which usually occurs in mixed-use environments. The challenge for Homer Glen is how to do this along typical commercial corridors like 159th Street and Bell Road. Local examples that have had success in this approach is Lake Street near Route 53 in Addison and the Deer Park Center in Deer Park. Homer Glen should be ready to support businesses that take creative steps to serve customers, such as contactless service, mobile pay, wider aisles, display floors that respect social distancing, enhanced online shopping experiences, mobile apps, etc.

OFFICES » Office expansion may be limited with more people working at home, although recent trends suggest offices may be expanding in vacant retail areas. This seems to support the move to mixed-use areas vs. single-use districts. Inside an office building, desks and workspaces may have greater separation. Employers may also stagger staff to balance those working in the office and others who telecommute from home.

RESTAURANTS » Similar to offices, restaurants continue to be impacted as a result of people finding benefits from working at home. Households are more frugal buyers eating at home more. There will be a loss of synergy between daytime workers who now work at home and won’t be frequenting restaurants like they used to. Restaurants may respond by providing smaller dining rooms, right-sized dining areas with socially distanced tables, and more prominent pickup/delivery areas (Chipotle has been experimenting with such a prototype, including a pilot location in Wrigleyville).

WAREHOUSING » The increase in mega-corporations like Amazon over the past 50 years suggests the rise of companies that are larger in size and fewer in number. This provides these mega-corporations with greater control of the economic future. As a result, industrial/warehouse activity keeps growing, particularly as online shopping and the need for delivery services surge. This requires larger warehouses. It also impacts local retail with the potential reaction for communities to buy local and support small businesses where mixed uses, convenience, and placemaking are pushed to the forefront. The key for Homer Glen is targeting a few key nodes, such as the subareas described in Chapter 4.
RETAIL ASSESSMENT REGIONAL COMPARISONS

From a regional comparison perspective, retail in Homer Glen lags its neighbors in the region by virtually all measurements, as shown in Figures 7.4 and 7.5. This is a testament to its character as a primarily residential bedroom community. However, this lack of existing retail also presents an opportunity for attracting additional retail opportunities to catch up to neighboring communities and reduce the amount of retail leakage that Homer Glen residents spend beyond the Village.

<table>
<thead>
<tr>
<th>SUB-INDUSTRIES</th>
<th>HOMER GLEN</th>
<th>LEMONT</th>
<th>ORLAND PARK</th>
<th>LOCKPORT</th>
<th>NEW LENOX</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motor Vehicle/Parts Dealers</td>
<td>0.5%</td>
<td>0.2%</td>
<td>1.3%</td>
<td>1.9%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Furniture/Home Furnishings</td>
<td>0.7%</td>
<td>0.3%</td>
<td>1.7%</td>
<td>0.5%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Electronics/Appliances</td>
<td>0.7%</td>
<td>0.8%</td>
<td>0.5%</td>
<td>1.0%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Building Material/Garden Equip &amp; Supply</td>
<td>2.5%</td>
<td>1.3%</td>
<td>1.4%</td>
<td>1.6%</td>
<td>1.1%</td>
</tr>
<tr>
<td>Food &amp; Beverage Stores</td>
<td>1.6%</td>
<td>1.2%</td>
<td>1.7%</td>
<td>2.7%</td>
<td>2.2%</td>
</tr>
<tr>
<td>Health/Personal Care</td>
<td>1.1%</td>
<td>1.5%</td>
<td>1.7%</td>
<td>1.0%</td>
<td>1.8%</td>
</tr>
<tr>
<td>Gas Stations</td>
<td>0.4%</td>
<td>-</td>
<td>0.1%</td>
<td>0.5%</td>
<td>-</td>
</tr>
<tr>
<td>Clothing/Accessories</td>
<td>-</td>
<td>1.2%</td>
<td>5.1%</td>
<td>0.6%</td>
<td>0.7%</td>
</tr>
<tr>
<td>Sports/Hobby/Book/Music</td>
<td>-</td>
<td>0.7%</td>
<td>0.8%</td>
<td>0.6%</td>
<td>0.7%</td>
</tr>
<tr>
<td>General Merchandise Stores</td>
<td>0.4%</td>
<td>0.5%</td>
<td>0.6%</td>
<td>0.6%</td>
<td>0.6%</td>
</tr>
<tr>
<td>Misc. Store Retailers</td>
<td>1.5%</td>
<td>1.8%</td>
<td>2.3%</td>
<td>2.4%</td>
<td>1.8%</td>
</tr>
<tr>
<td>Nonstore Retailers</td>
<td>0.4%</td>
<td>0.8%</td>
<td>0.2%</td>
<td>0.2%</td>
<td>0.2%</td>
</tr>
<tr>
<td>Food Service &amp; Drinking Places</td>
<td>7.3%</td>
<td>7.2%</td>
<td>8.1%</td>
<td>9.6%</td>
<td>8.4%</td>
</tr>
</tbody>
</table>

FIGURE 7.4
TOTAL BUSINESSES, EMPLOYEES, AND SALES IN HOMER GLEN AND NEIGHBORING COMMUNITIES, 2019


FIGURE 7.5
RETAIL SUB-INDUSTRIES BY PERCENTAGE OF TOTAL BUSINESSES IN HOMER GLEN AND NEIGHBORING COMMUNITIES, 2019

KEY FINDINGS

• Business Leaks: Homer Glen has seven industries that are experiencing 100% leakage. Local residents typically make the following purchases outside of the Village:
  - Book, Periodical, and Music Stores
  - Department Stores
  - Electronic Shopping & Mail-Order Houses
  - Other Motor Vehicle Dealers
  - Shoe Stores
  - Specialty Food Stores
  - Vending Machine Operators

These industries present opportunities to diversify Homer Glen’s retail mix, encourage local spending within the Village, and expand the municipal tax base.

• Business Void Analysis: The following industries are currently underrepresented in Homer Glen, especially in comparison to the rest of the region (10-mile radius) surrounding the Village:
  - Automotive
  - Entertainment
  - Pet Shops and Pet Care
  - Recreation
  - Shopping
  - Beer Specialty Stores
  - Budget Retail Stores
  - Financial Planning
  - Grocery Stores
  - Shopping Centers & Malls
  - Wholesale Clubs

Similar to the retail industries identified in the business leakage findings above, these industries serve as additional opportunities to infuse new retail types into Homer Glen’s retail mix, keep local dollars in the community, and expand the tax base.

• Industry Clustering Opportunities: Regionally, there are four industry clusters with potential for future development in Homer Glen:
  - Construction of Buildings
  - Specialty Trade Contractors
  - Professional, Scientific, and Technical Services
  - Repair and Maintenance

These four clusters have heavy presence within a 30-minute radius of Homer Glen, but they are almost completely unrepresented within the Village. By leveraging existing regional competitive advantages, Homer Glen could tap into new opportunities for business attraction and relocation in these industries.
**SMALL-SCALE RETAIL CORRIDORS**

Homer Glen has an opportunity to respond proactively to two ongoing trends in the retail industry.

- First, the *rapid ascension of e-commerce* and the corresponding shift in consumer preferences towards internet-based shopping has resulted in a reactive response from many consumers to actively support traditional brick-and-mortar retail businesses in their communities.

- Secondly, the *stay-at-home orders associated with the COVID-19 pandemic* has resulted in social isolating for a prolonged period of time, which may result in greater interest from some populations to more actively shop in-person at local boutique stores rather than strictly through internet-based e-commerce.

These two corresponding phenomena suggest that there may be a good opportunity for Homer Glen to develop small-scale retail corridors with locally-owned boutique shops on a pedestrian-friendly corridor.

Currently, Homer Glen lacks walkable retail alternatives, due to the existing auto-focused retail developments that tend to be built as strip mall retail lining major arterials with parking in the front and few opportunities for walking between existing retail developments. The types of larger-scale retail/residential mixed-use developments, such as The Glen Town Center and *Burr Ridge Village Center* could find substantial success in a place like Homer Glen. This type of development responds well to the types of pedestrian-focused retail corridors that are expected to experience a resurgence in the post-COVID-19 world, especially among a niche of consumers who prefer to purchase goods locally.

**RECOMMENDATIONS**

- Review and amend the Village’s Zoning Ordinance to ensure appropriate zoning districts support employment-generating uses
- Review Annico Business Park for potential rezoning to I-1
- Provide zoning flexibility to allow reuse of underutilized parking lots for a greater mix of uses to increase value and activity
- Promote retail nodes near housing, employment centers, open spaces, and other public/civic uses to emphasize walkable mixed use environments
  » SEE THE SUBAREA FRAMEWORK PLANS IN CHAPTER 4
- Continue to focus a business attraction strategy on retail industry groups with significant leakage (e.g., local dollars spent outside Homer Glen) based on the Gap/Surplus Analysis or are under-represented based on the Void Analysis
- Evaluate the impacts of ancillary retail, lodging, and support services that typically accompany a potential regional sports complex
- Evaluate creating a new district for the 159th Street Corridor
- Work with property owners and tenants in retail centers to improve their properties and promote vacant spaces
- Expand upon current efforts to develop a business resource program that connects property owners, businesses, and employers with local resources and technical assistance
- Prepare a regional economic development marketing plan
- Implement the Village’s branding strategy, including improved gateway signage

**IMPLEMENTATION ACTION PLAN**

The recommendations above are keyed into the overall Implementation Plan provided in Chapter 12, which outlines details such as phasing, partners, and potential funding resources to support Village officials in putting the Homer Glen Comprehensive Plan Update into action.