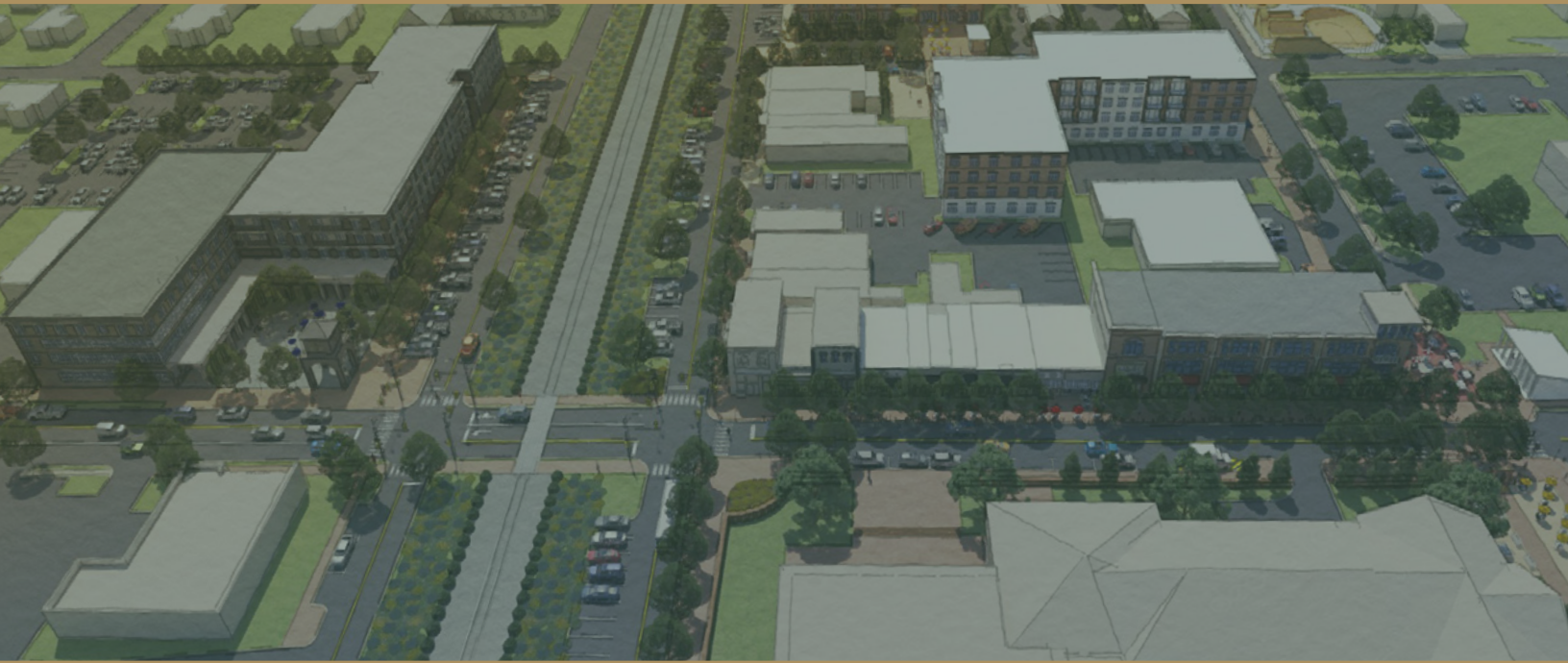


TOWN OF ELON

DOWNTOWN MASTER PLAN

SEPTEMBER 2023



A stylized white tree logo with a central trunk and several branches extending upwards and outwards, topped with a small circular element.

DOWNTOWN
CEELON
MASTER PLAN



TOWN OF ELON

DOWNTOWN MASTER PLAN

ADOPTED BY
TOWN COUNCIL

SEPTEMBER 25, 2023





A stylized white tree logo with a central trunk and several branches extending upwards and outwards, topped with a small circular element.

DOWNTOWN
CELON
MASTER PLAN

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1

INTRODUCTION

INTRODUCTION

OVERVIEW

Downtown Elon is the vibrant centerpiece of the community with a strong town-gown relationship with the University of Elon, serving residents, students, and visitors alike. Since the adoption of the 2014 Downtown Master Plan, the Town has become a North Carolina Main Street community and has initiated events and policy changes to strengthen Downtown as the center for activity, retail, and art in Elon. The long-term success of Downtown has been guided by the volunteer leadership of the former Downtown Advisory Committee that is now Downtown Elon, Inc, a 501(c)(3) non-profit organization charged with improving downtown. The organization is led by a Board of Directors and the Downtown Development Director, a position that is funded by the Town of Elon and Elon University. The organization's volunteers and staff have worked to help retain small businesses, generate downtown activities, and bring new investment to Downtown Elon. In order to keep this momentum going, the Town of Elon began the process to update its Downtown Master Plan in October of 2022. This document contains the results of the process and the plan of action to continue moving Downtown Elon forward.

▼ FIGURE 1.1: DOWNTOWN EVENT AT WEST COLLEGE AVENUE AND NORTH WILLIAMSON AVENUE



MASTER PLAN DEVELOPMENT PROCESS

The Downtown Master Plan for the Town of Elon was guided by the Town of Elon staff and the Downtown Advisory Committee consisting of residents, community leaders, property owners, a representative from the University of Elon, and additional Town staff members. The total planning process spanned 12 months and was divided into three main phases outlined below.



PHASE 1 - DOWNTOWN ASSESSMENT

This phase of the Plan began in October 2022 and concluded in February 2023. Phase one included a community wide survey to gather input from the entire community. It also included small group listening sessions with a variety of subject matter experts, property owners, business owners, University officials and students, elected and appointed officials, and other downtown advocates and experts. During this phase, background research was completed to gain a firm understanding of the market potential, including a parking inventory, urban design analysis, and an examination of potential streetscape improvements for Williamson Avenue. The culmination of this phase was the Downtown Assessment.



PHASE 2 - DOWNTOWN WORKSHOPS

The community had three opportunities to participate in downtown workshops to develop the main issues and ideas to include in the Master Plan. The workshops provided an opportunity for evaluating streetscape improvements and alternatives for North Williamson Avenue and other development opportunities in downtown. The workshops were held on April 25, May 4, and May 11 at the Elon Community Church Community Life Center from 6:30 to 8:30pm each night.



PHASE 3 - DOWNTOWN MASTER PLAN

The final phase focused on the preparation of the master plan document and recommendations. The plan was prepared by utilizing the background information and feedback received from the community during the listening sessions, survey, and workshops.

COMMUNITY INPUT

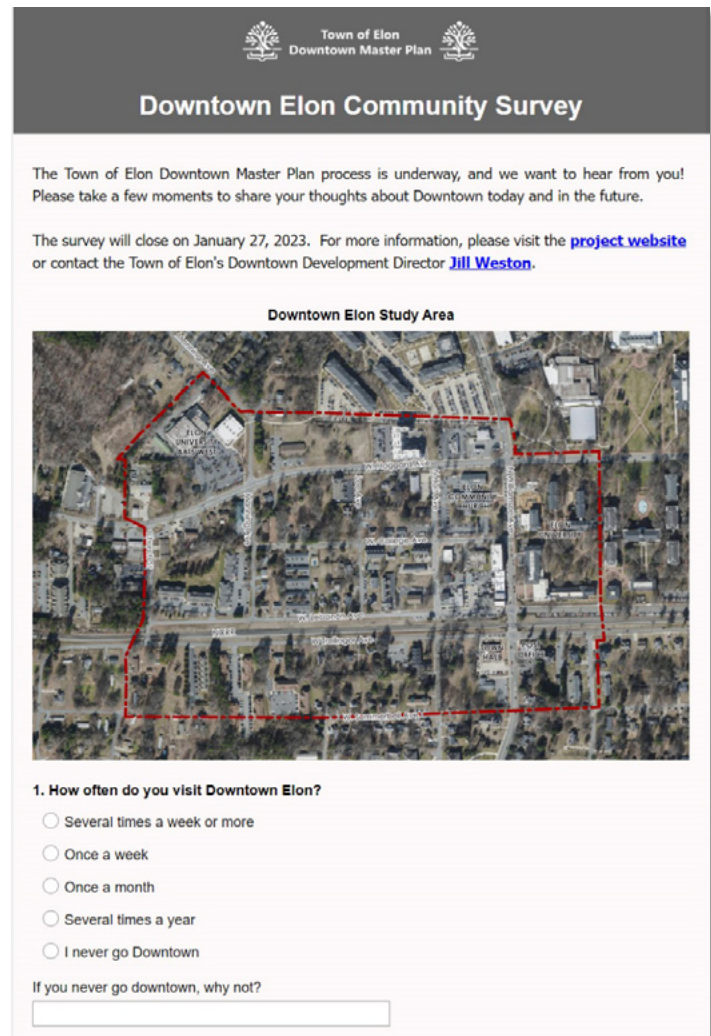
Throughout the Master Planning development process, the broader community was engaged at key points to gain input and insight into the community's vision for the future. A total of 269 individuals responded to the Community Survey which was open the entire month of January. The survey also allowed community members to sign up for email updates about the project.

The survey asked general questions about how the respondents experience Downtown Elon, their least and most favorite parts of Downtown, their feelings about parking and transportation, as well as their opinions about the future of Downtown Elon. In addition to these general questions, respondents were asked specifically about their opinions for the streetscape on North Williamson Avenue and the development of Public Spaces.

The majority of respondents to the survey either lived in the Town of Elon (53%), worked in the Town (24%) or lived in Alamance County (35%), and 42% of respondents were between the ages of 36-50. Some of respondent's favorite things about Downtown included restaurants, the small size, and local businesses. Some of the least favorite things that respondents noted include parking, traffic, not enough things to do, not enough restaurants, and not much for families.

In addition to general community input, listening sessions were held with subject matter experts, major property owners, real estate/development community, Elon University (staff and student groups), business owners, Town department heads, Downtown Elon board members, and others as identified. Just over 60 people were interviewed during the listening session process on November 14 and 15, 2022. As part of Phase 2, downtown workshops were held to gather public input on the design and development process. Approximately 50 people attended these workshops and helped develop a consensus around a vision for the future streetscape and development opportunities for the downtown.

▼ FIGURE 1.2 COMMUNITY SURVEY



PROJECT TIMELINE

PROJECT KICKOFF

In October 2022, the project team met with Town Staff to finalize the project schedule and public engagement plan.



PHASE ONE

October 2022- February 2023

The project team worked on an assessment of Downtown Elon to review existing conditions and identify opportunities and challenges.



PHASE TWO

April 2023- May 2023

The project team held a series of Downtown Workshops to develop gather additional community input into the Plan.



PHASE THREE

June 2023- August 2023

The project team prepared the Draft Master Plan.



PLAN ADOPTION

September 25, 2023

A stylized tree logo with a gold trunk and branches, green leaves, and a gold acorn at the top. The trunk is integrated with the letter 'E' in 'CEYLON'.

DOWNTOWN
CEYLON
MASTER PLAN

2

DOWNTOWN ASSESSMENT

DOWNTOWN ASSESSMENT

OVERVIEW

The first commercial buildings were constructed in the Town during the early 1890's. Due to the location of these buildings along the railroad tracks, this area became the center point of activity. Today, some of those historic buildings are still around and house a variety of restaurants and retail shops designed for residents, students, and visitors.

STUDY BOUNDARY DEFINED

The study boundary for Downtown Elon was first defined in 2014 during the previous Master Planning process. The 8-block area stretched from W. Haggard Ave to W. Lebanon Ave and from Church Street to N. Williamson Ave. This Master Plan update expanded the study area South towards Summerbell Avenue, North up towards Elon Commons Dr to include the buildings on both sides of W. Haggard, and slightly East to include town-owned and university-owned areas along N. Williamson Ave. The new boundary also includes the area South of the railroad track down to W. Summerbell Ave as this area includes the Town Hall and the Post Office which are important contributors to downtown.

URBAN FORM AND LAND USE

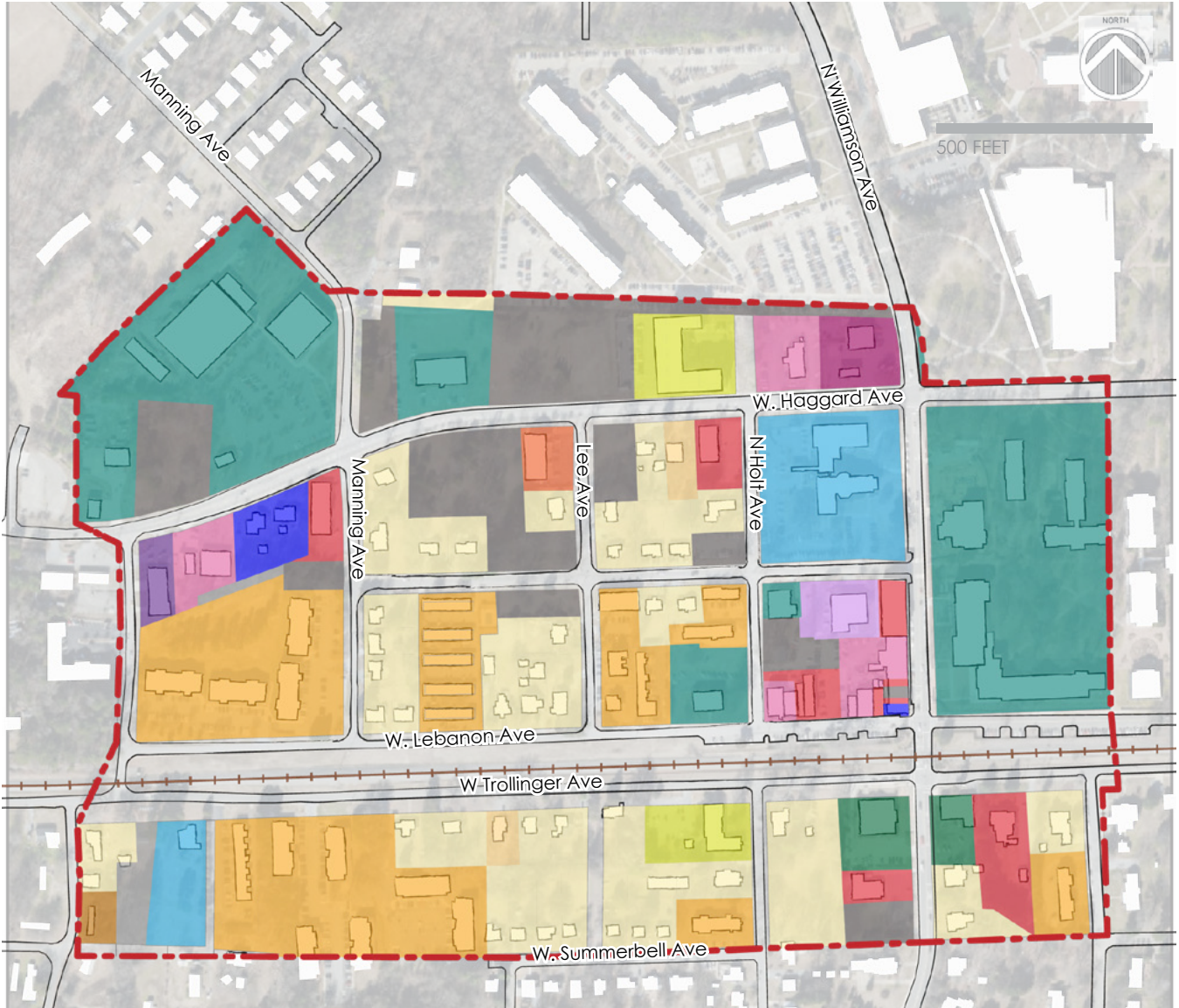
The Downtown Study Area includes about 90 acres of land. 13% of this land is occupied by buildings or structures, 17% of the land is covered by impervious parking lots, and 26% of the land is within the right of way. The map to the right highlights the basic footprint of buildings within the area. The downtown core includes a variety of residential and commercial buildings ranging from 1-3 stories.
















▼ MAP 2.1 DOWNTOWN STUDY AREA



Within Downtown Elon, the majority of parcels are occupied by residential uses, largely either apartments or single-family homes. The University of Elon also owns several large parcels within the study area. The main retail and restaurant uses within the downtown are concentrated along N. Williamson Ave from W. College Ave to W. Lebanon Ave and along W. Lebanon from N. Williamson to N. Holt Ave. In the future, concentrations of new downtown entertainment and retail uses should be connected with this existing restaurant and retail area to create a greater density of activity and places for people to gather in the downtown.

▼ MAP 2.2: DOWNTOWN LAND USE

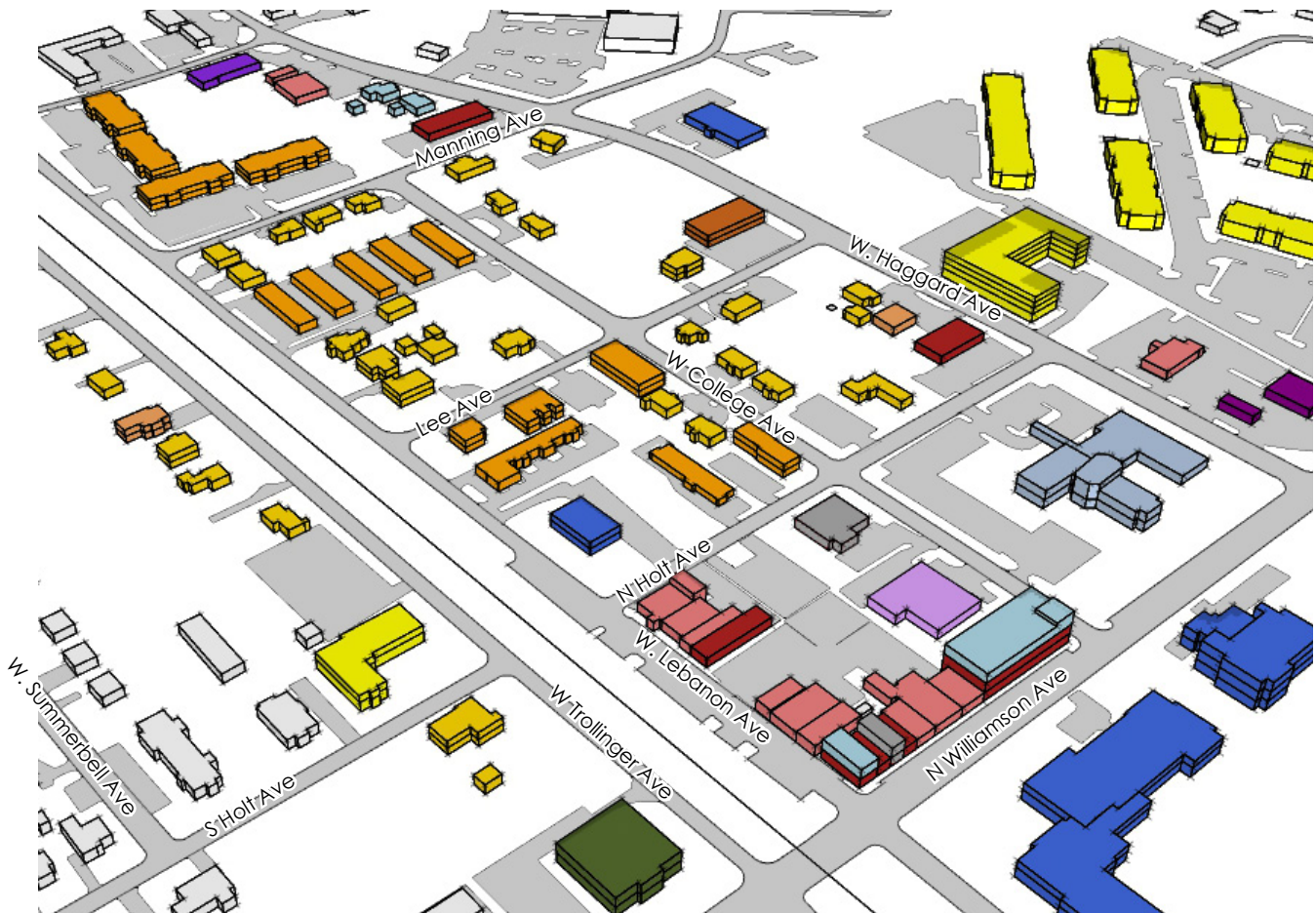

















 Single Family	 Government Use	 Service
 Two Family	 Retail	 Warehouse
 Multi-Family/ Apartment	 Restaurant	 Office
 University Dorm	 Vacant	 Church
 University	 Hotel/ Motel	 Gas/ Convenience

TYPES OF BUSINESSES AND USES

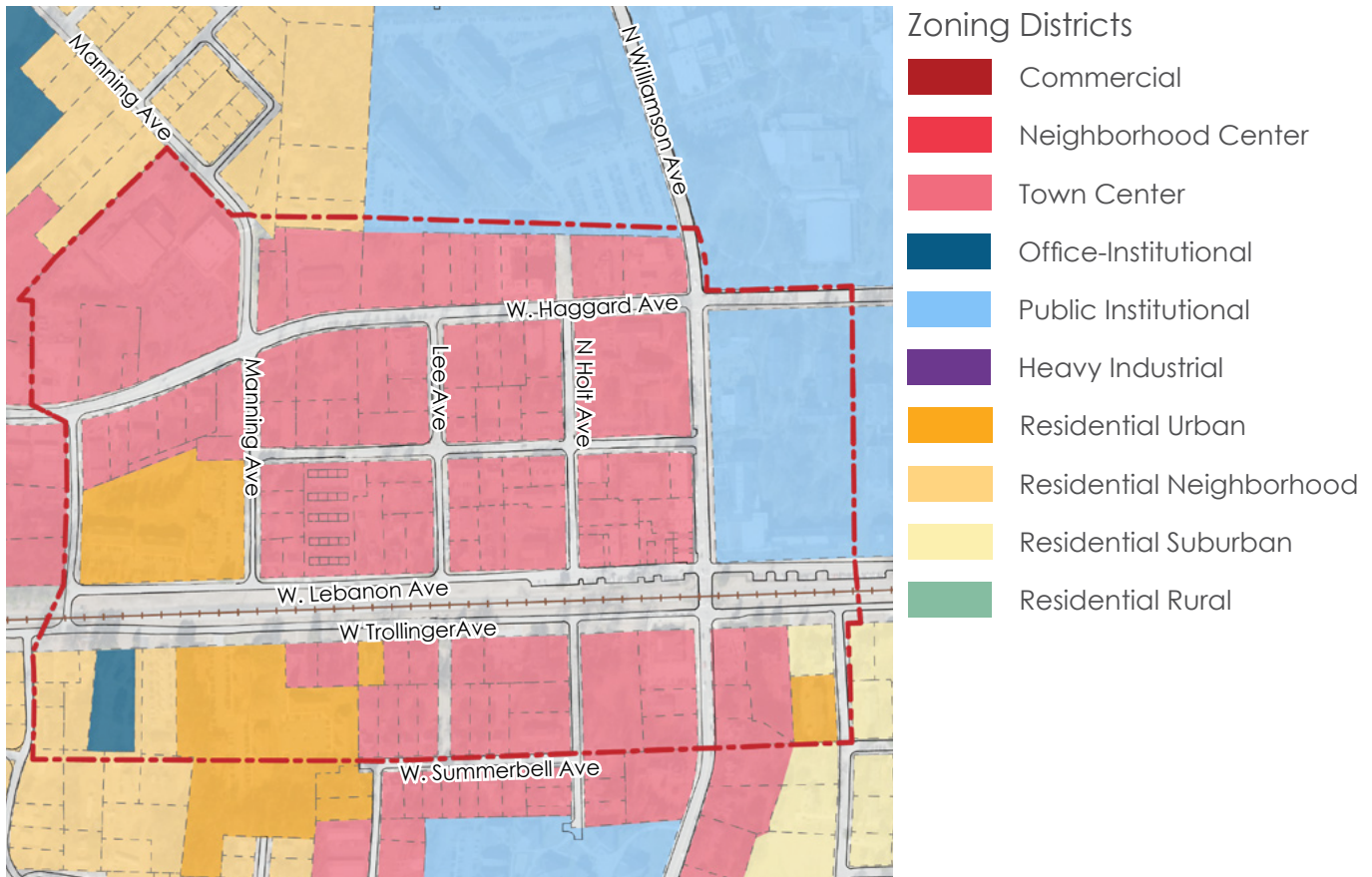
According to the community survey, approximately 38% of respondents come to Downtown several times a week and an additional 31% of respondents visit Downtown at least once a week. 90% of respondents said that they come to Downtown for dining and entertainment, 37% visit for the post office, 27% visit for festivals and events, 25% come for recreation or exercise, and 24% come to Downtown to visit the University. The core of activity within the Downtown area is along N. Williamson and W. Lebanon Avenues. The first floors of the buildings on those streets is primarily retail and restaurant establishments. Moving outside of this core, the next ring of buildings is occupied by public/private institutional uses, offices, and other civic uses. The final ring of building uses is residential with a few additional service buildings. Several vacant parcels and buildings in Downtown have potential for development to grow the core of Downtown.

▼ MAP 2.3: DOWNTOWN CORE BUILDING USES



	Single Family		Retail		Hotel/ Motel
	Two Family		Restaurant		Church
	Multi-Family/ Apartment		Gas/ Convenience		Office
	University Dorm		Warehouse		Service
	University Use		Vacant		Government Use

▼ MAP 2.4: DOWNTOWN ZONING (2004 LAND DEVELOPMENT ORDINANCE)



▼ TABLE 2.1: ZONING BY LAND AREA (2004 LAND DEVELOPMENT ORDINANCE)

	ACRES DOWNTOWN	% OF DOWNTOWN TOTAL	ACRES IN TOWN	% OF TOWN TOTAL
Commercial	0	0%	87.75	2.5%
Neighborhood Center	0	0%	10.63	0.3%
Town Center	41.05	73%	68.59	1.9%
Village Center	0	0%	85.38	2.5%
Office- Institutional	0.46	0.8%	148.98	4.3%
Public Institutional	7.78	14%	778.05	22.4%
Industrial	0	0%	34.98	1.0%
Residential Urban	5.39	9.6%	139.28	4.0%
Residential Neighborhood	1.22	2.2%	817.58	23.5%
Residential Suburban	0.46	0.8%	1185.79	34.2%
Residential Rural	0	0%	112.15	3.2%

Land use and development in Downtown is also guided by zoning. Within the study area, the primary zoning designation is Town Center; although, the zoning ordinance is currently going through a major rewrite. The current Town Center designation is intended to promote the revitalization, re-use, and expansion of Elon's historic town center. The designation focuses on civic, cultural, and government activity. The following uses are permitted by right within the Town Center zone:

- Bed and Breakfast inns
- Civic, cultural, club, fraternal, and community facilities (excluding correctional & waste management facilities)
- Commercial and office uses
- Congregate housing designed within the "civic" building type
- Hotels
- Indoor recreation
- Indoor commercial amusement
- Single family detached homes
- Live/work units
- Solar energy systems (level 1)

Other zoning designations within the study area include public-institutional, urban residential, suburban residential, and office-institutional. Once the new zoning ordinance is finalized, the study area should be evaluated for any related updates applicable to the Downtown.

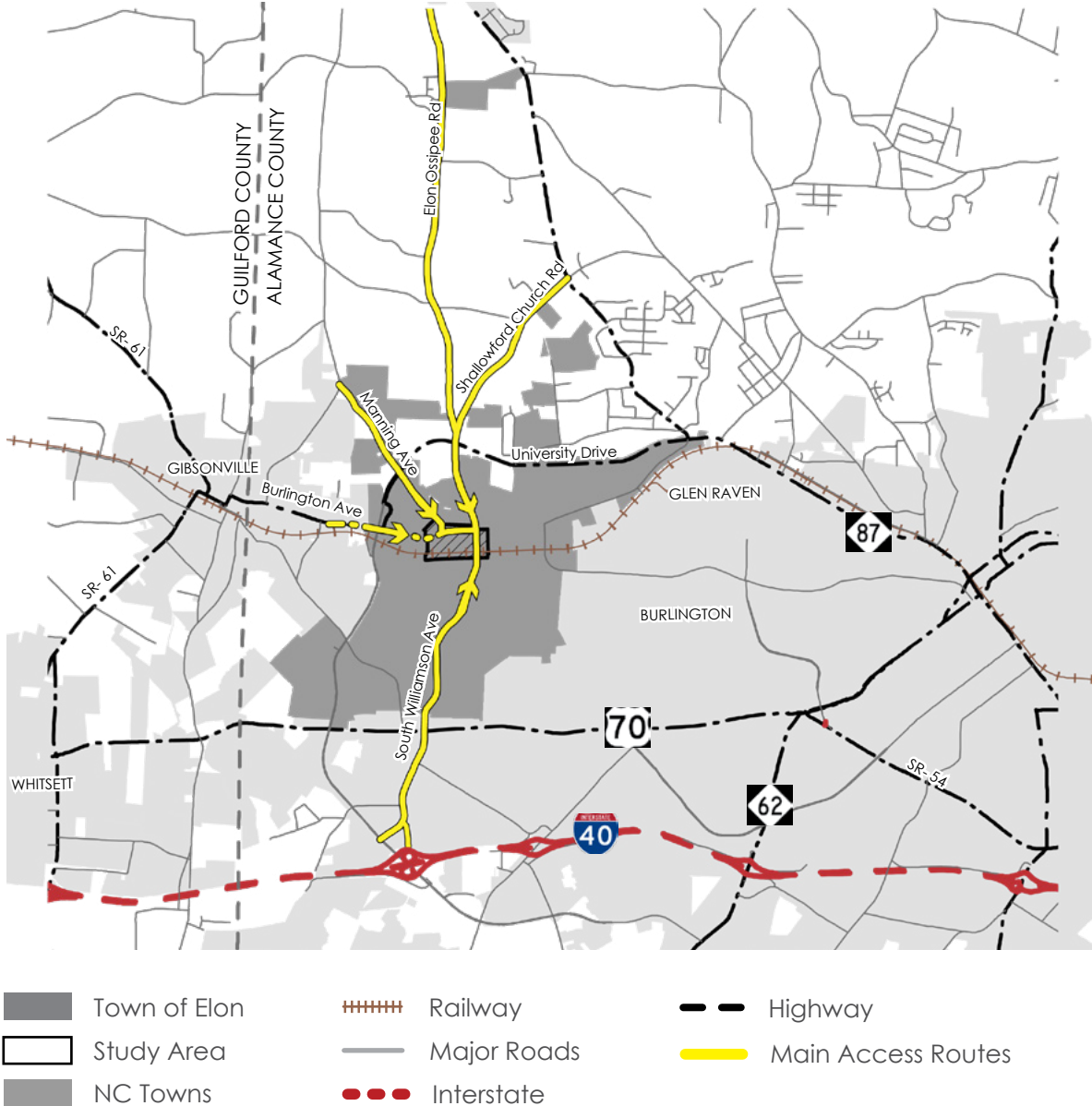
▼ FIGURE 2.1: TOWN CENTER ZONED AREA



VEHICULAR ACCESS TO DOWNTOWN

The Town of Elon is located along the eastern boundary of Alamance County just north of Interstate 40 and on the western boundary of the City of Burlington. Several major roadways provide access and connections for Elon's residents and visitors. The roads crossing through Downtown Elon include Williamson Avenue, which bisects the Downtown and main University properties from north to south, and Haggard Avenue, which provides the main east west connection through downtown. Outside of the downtown, the major roadways providing access are University Drive, which runs east to west along the northern edge of the Town; NC 87, connecting north and south; US 70, providing an east-west connection; and Interstate 40, which is the major east-west connection across the state and southwestern United States.

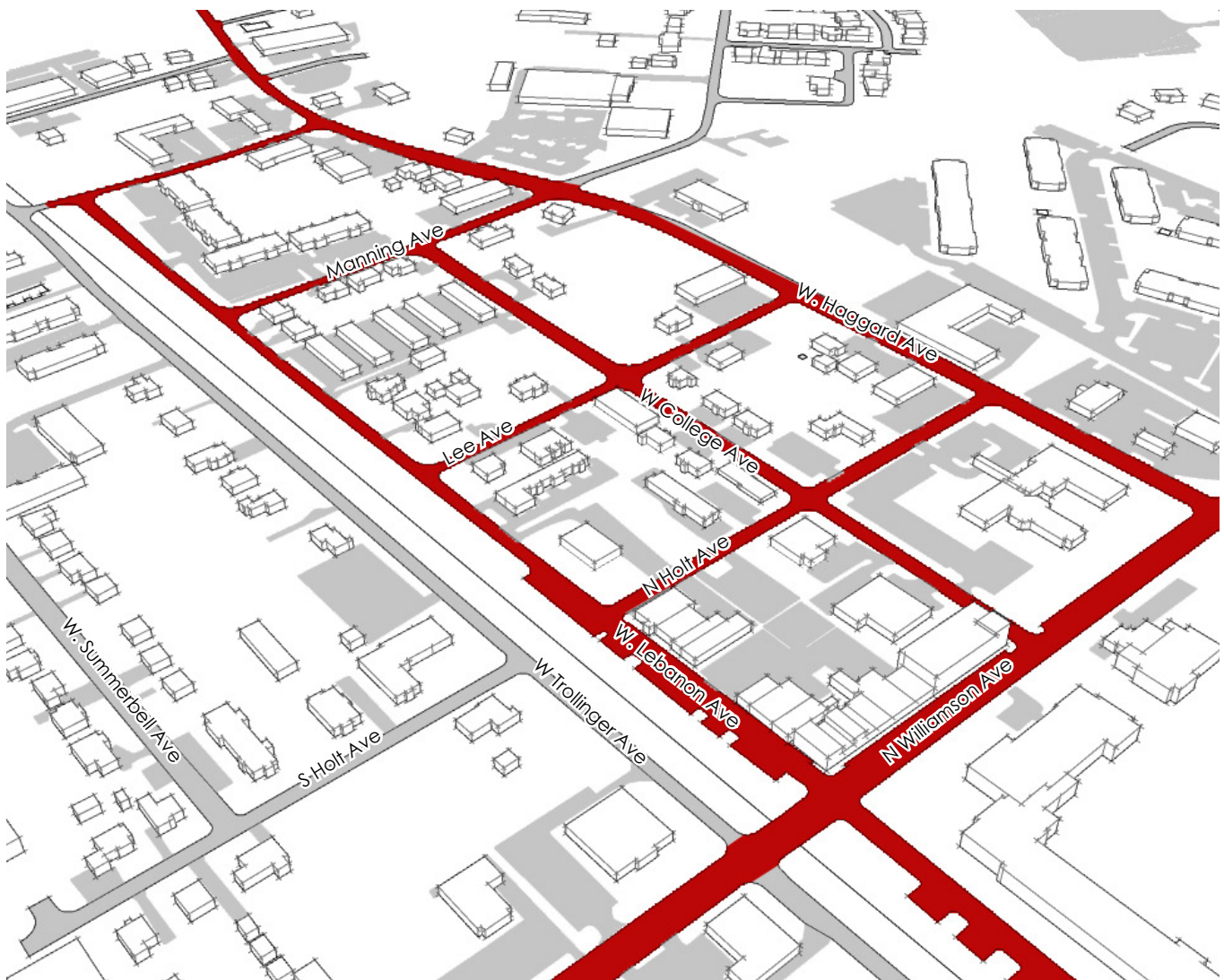
▼ MAP 2.5: REGIONAL ACCESS



People traveling into Downtown Elon have several options. Burlington Avenue provides access from Guilford County and becomes Haggard Avenue as it runs through Downtown Elon. Manning Ave provides access into Downtown from the North. Williamson Avenue provides downtown access from both the north and the south and allows for a flow of traffic through the downtown area and to Elon University.

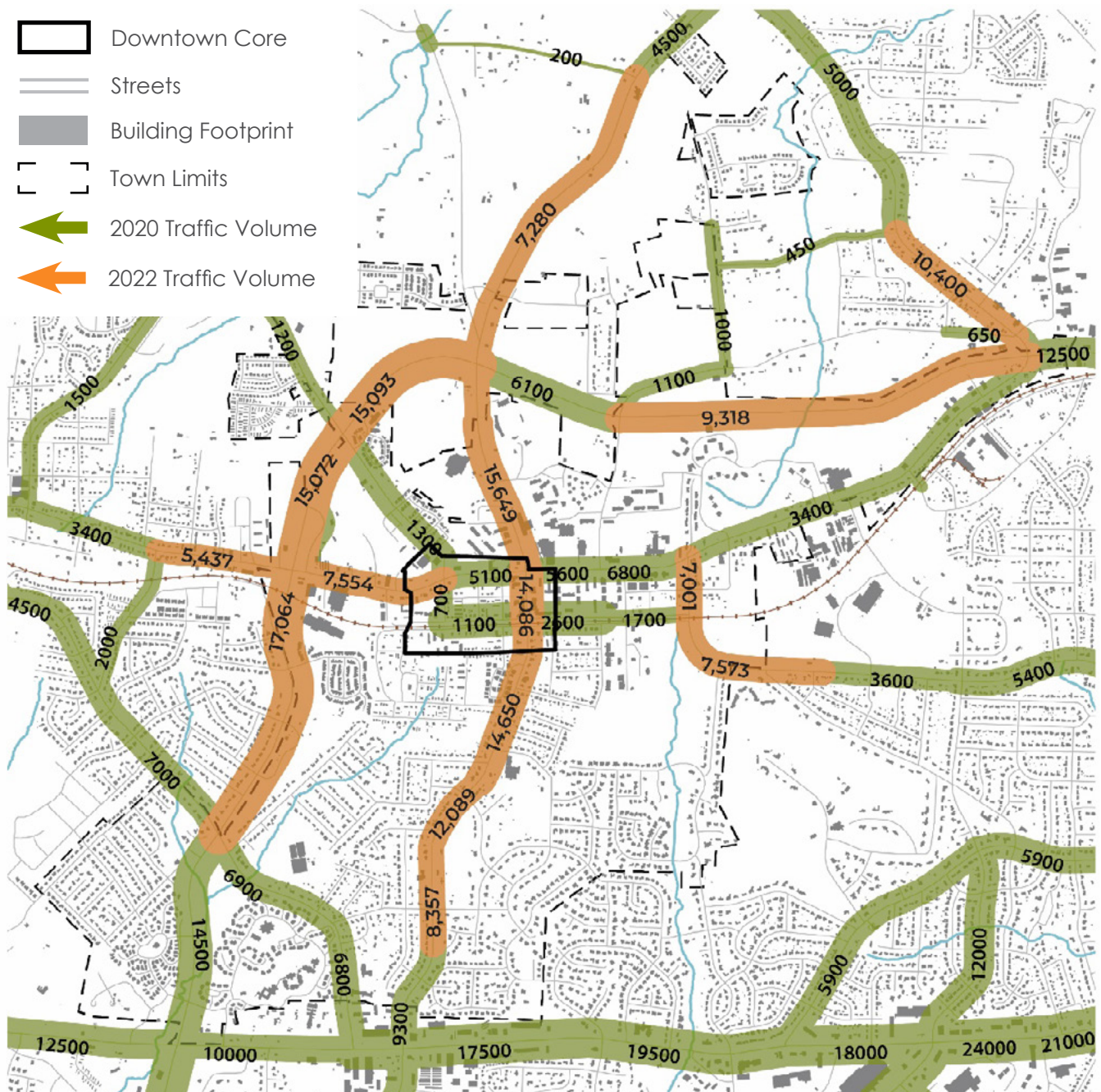
As mentioned in the land use section, 26% of the land in Downtown is within a Town or NCDOT right-of-way (does not include the NC Railroad R-O-W). The right-of-way, shown in red on this map denotes the land between parcels that is owned by the Town or NCDOT to be used for roadways and transportation infrastructure. While the existing roadways provide options for access in and around Downtown Elon, community survey respondents indicated that they would like an improved pedestrian environment and better traffic flow.

▼ MAP 2.6: ROUTES IN DOWNTOWN



The map below illustrates the average daily traffic count (AADT) for roadways in and around Downtown Elon. The North Carolina Department of Transportation (NCDOT) provided its most recent traffic count data for 2020; however, more recent data was made available for some roadways through the Burlington-Graham MPO for 2022. Both of these data points are included on Map 2.7. Williamson Avenue through the core of Downtown has an AADT of 14,000, while approximately 6,800 cars travel on East Haggard and 7,500 on West Haggard each day. University Avenue and US 70 experience the heaviest levels of traffic with some segments reaching over 17,000 AADT.

▼ MAP 2.7: NCDOT AVERAGE DAILY TRAFFIC (2020 AND 2022)



PEDESTRIAN AND BICYCLE MOBILITY

While driving is the primary choice for people traveling to downtown, walking is the primary mode of travel for moving around the downtown area. As mentioned previously, an improved pedestrian environment was one of the elements that the community survey respondents indicated would encourage them to visit Downtown more often.

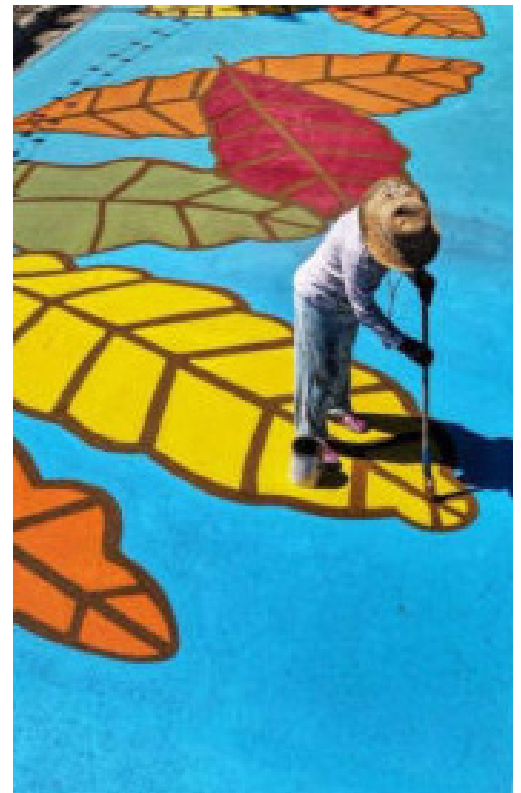
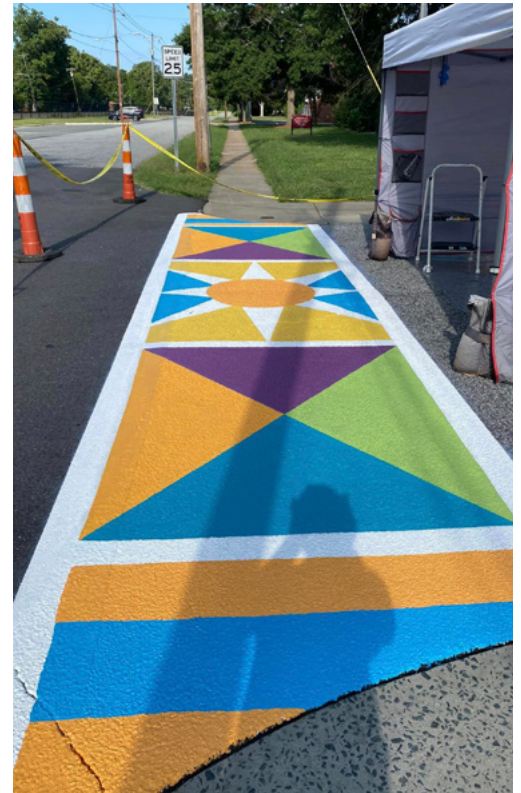
Downtown Elon has a strong existing sidewalk network. However, several gaps exist in the network, especially as you move west of N. Williamson Avenue. Despite the strong sidewalk network in other areas of Downtown, many of the sidewalks present challenges for pedestrians: they lack protection from cars at driveways, they lack the space for useful outdoor seating or cafe space, and several contain obstacles such as utility poles.

Crosswalks are currently only present along N. Williamson Avenue, which is especially important for university students. Additional crosswalks and crosswalk improvements would increase pedestrian safety in Downtown. The Town of Elon has recently added two new murals into the Downtown Area, by artist Mary E. Ryan. The first mural, shown in the upper right image, marked a crosswalk at N. Holt Avenue with a colorful abstract piece.

Bicycles are also a popular mode of transportation in the Town of Elon, especially by University students and staff. However, no designated bike lanes are located in Downtown.

From 2010-2021 there were three recorded pedestrian crashes and 5 recorded bicycle crashed in the Downtown Study area. The crashes, shown on page 23, are mostly concentrated around the intersections on N. Williamson Avenue.

▼ FIGURE 2.2 DOWNTOWN MURALS BY MARY. E. RYAN



MAP 2.8 SIDEWALKS

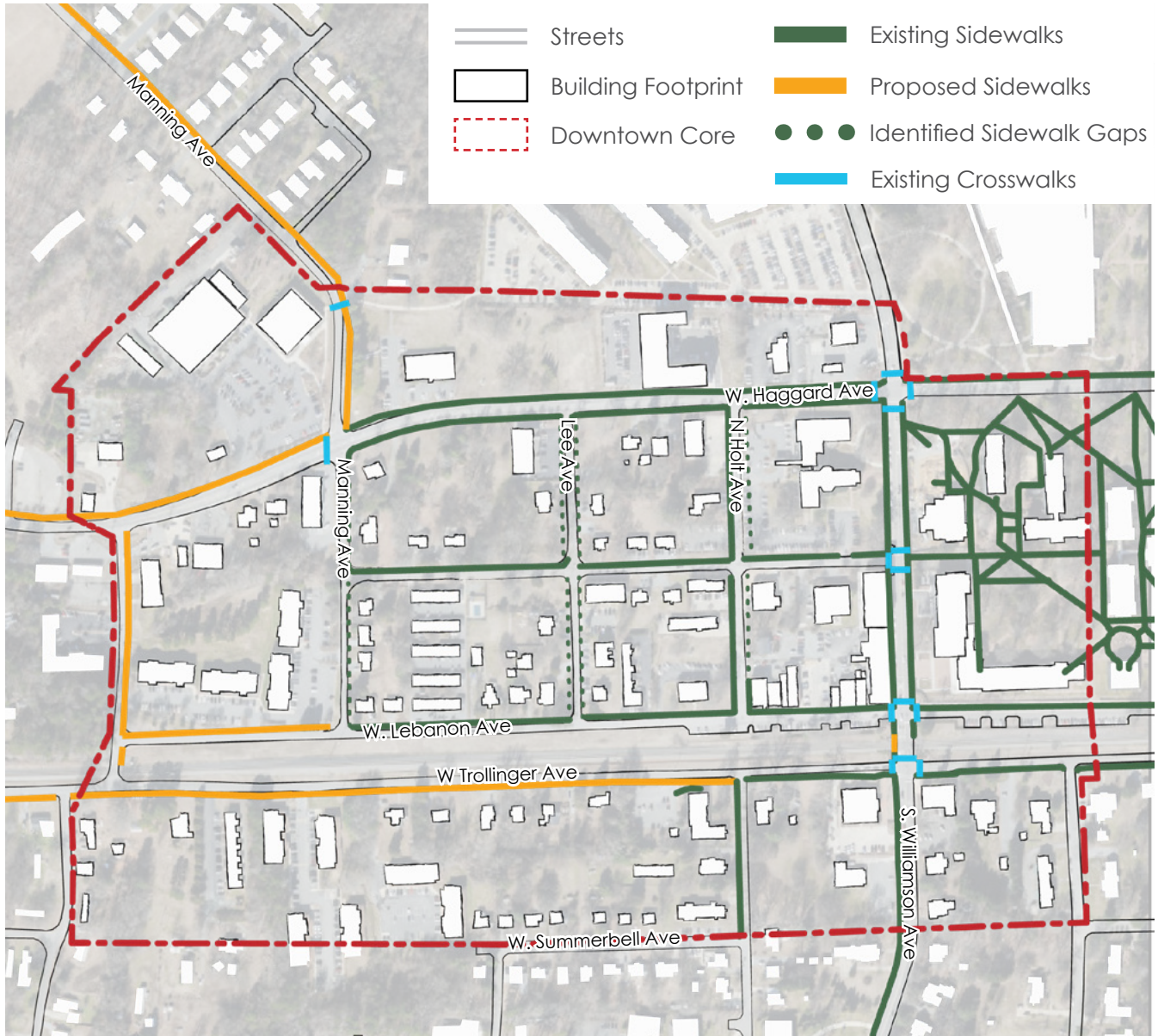
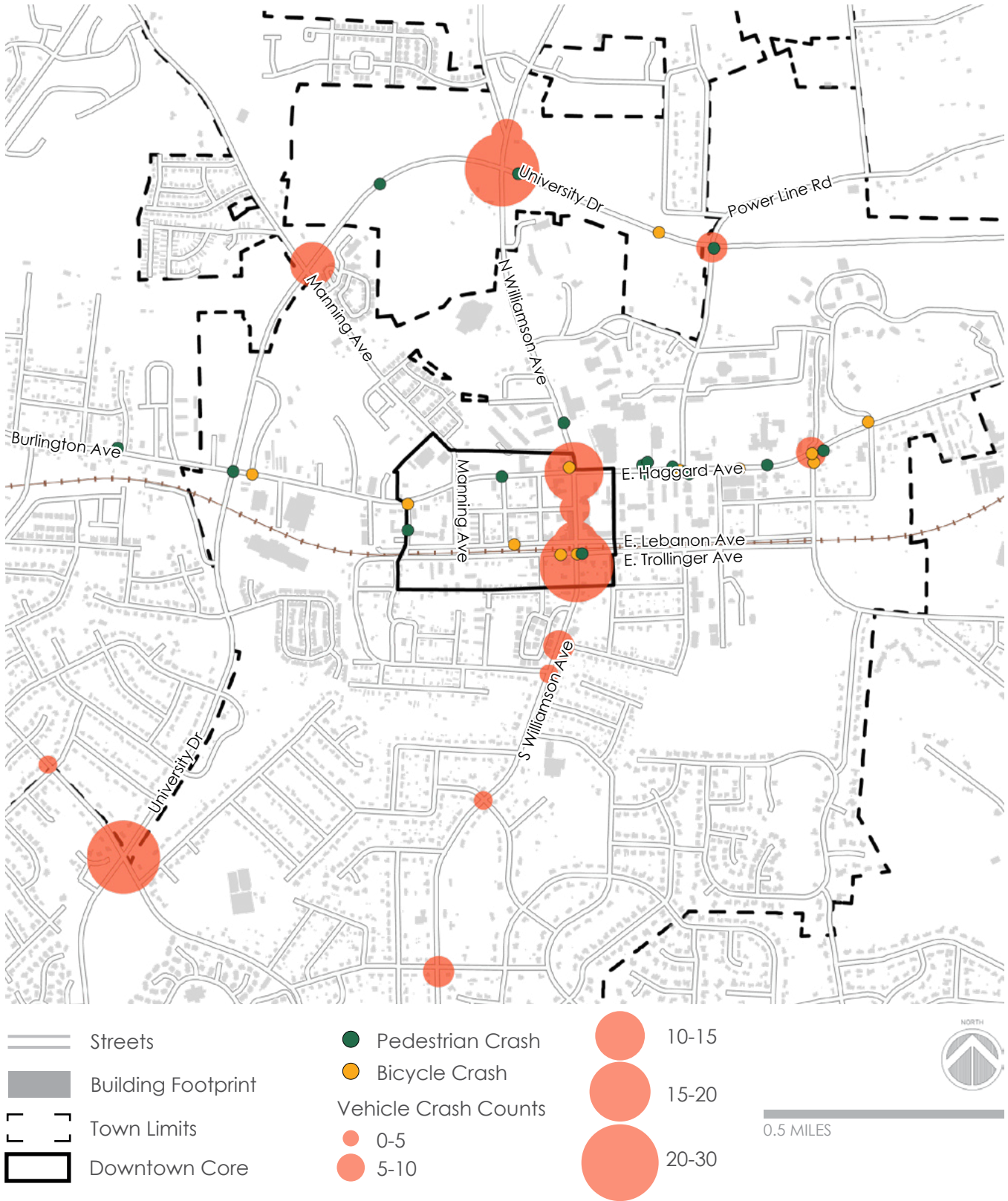


FIGURE 2.3: NARROW SIDEWALKS IN DOWNTOWN



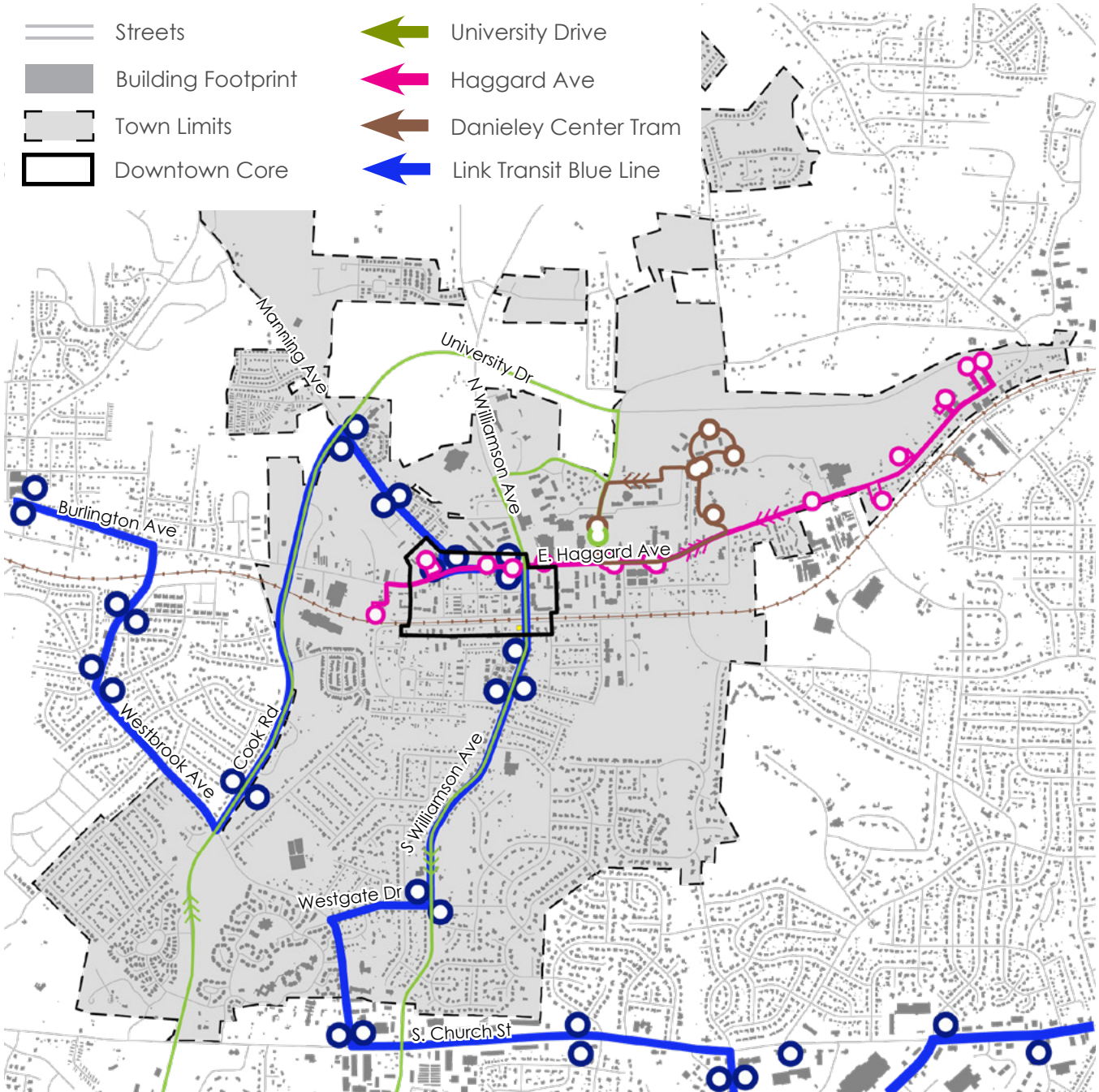
▼ MAP 2.10: NCDOT CRASH STATISTICS (2015-2019) AND BIKE PED (2021)



PUBLIC TRANSIT

Bus service in Downtown Elon is provided by The University of Elon and Link Transit. Three of the University routes operate in and around the Downtown core. The University Drive Route runs down Williamson Ave. The Haggard Ave route runs along Haggard Avenue and has four stops within the Downtown core. As of 2023, Link Transit added a Blue line to service the Town of Elon. The Blue line connects the Town with Downtown Burlington and Downtown Gibsonville.

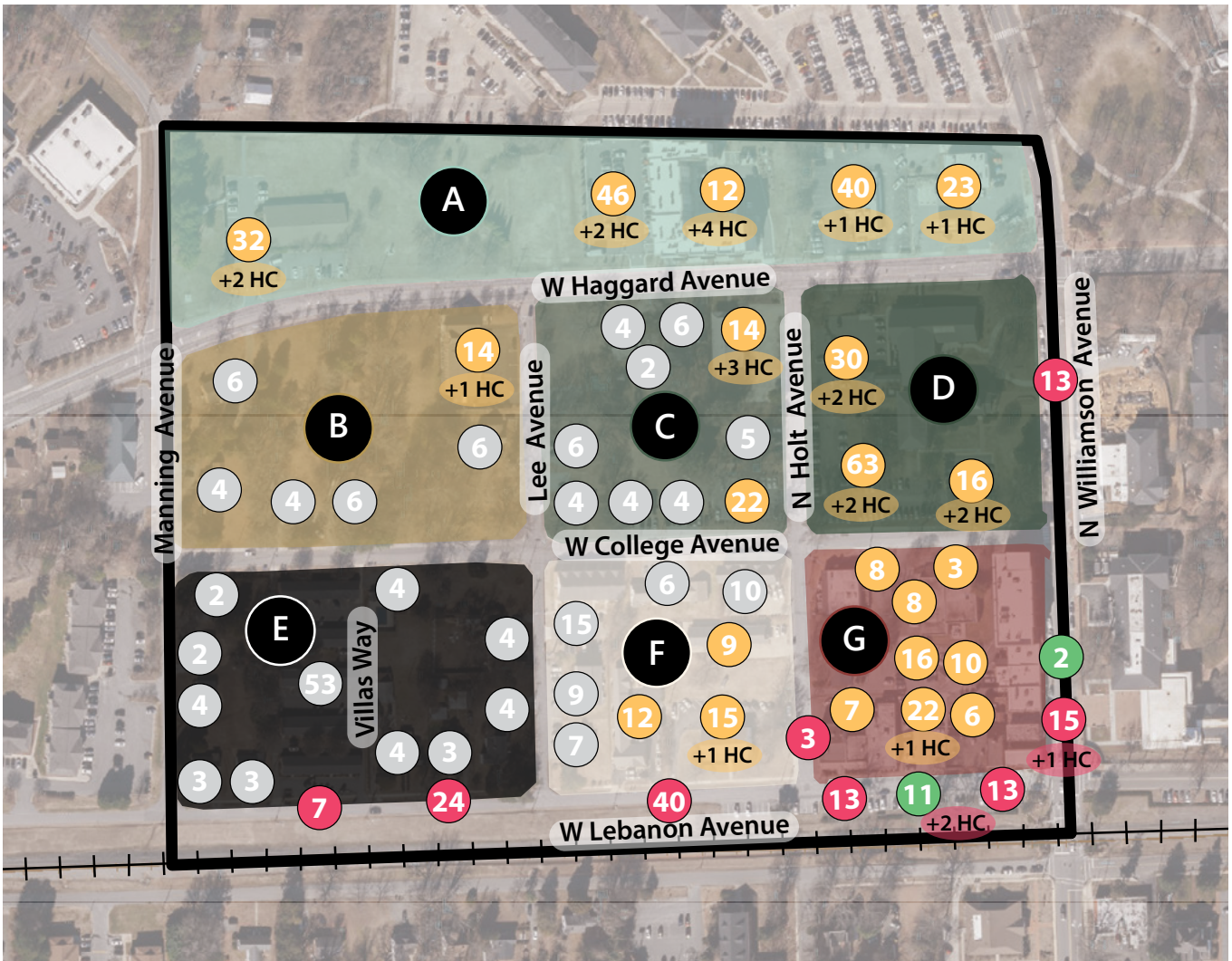
▼ MAP 2.9: ELON EXPRESS AND LINK TRANSIT SCHEDULE (2022)



PARKING

As part of the Downtown Assessment a separate parking inventory was completed to measure the availability of parking in Downtown Elon. Availability of parking was an issue that was raised in the survey and the listening sessions. Since the last inventory of parking was taken in 2016 there has been a net gain of 28 parking spaces within the 2016 parking study boundary. The total number of parking spaces in 2022 including on-street, off-street, and private spaces was 581 spaces. As noted earlier, parking consumes more land area Downtown than buildings at 17% of land area or around 15 acres,

▼ MAP 2.11 PARKING INVENTORY IN DOWNTOWN ELON, NOVEMBER 2022



PARKING TYPES

- ON-STREET SPACES
- ON-STREET SPACES USED FOR DINING
- PRIVATE SPACES (COMMERCIAL AND CIVIC)
- PRIVATE SPACES (RESIDENTIAL)

DOWNTOWN PARKING INVENTORY BOUNDARY



500 FEET

60% of survey respondents felt that parking was either difficult or very difficult within Downtown and several respondents mentioned that better parking would encourage them to visit downtown more often. In order to help improve the parking supply, the Town has been working on plans to add additional parking along W. Lebanon Avenue. The plans, in Figure 2.4 below, show approximately 75 additional new parking spaces with curb and gutter for stormwater drainage along the W. Lebanon Avenue.

▼ FIGURE 2.4: DESIGNS FOR ADDITIONAL PARKING ALONG LEBANON AVE (NEW SPACES HIGHLIGHTED BELOW)



▼ FIGURE 2.5: PARALLEL PARKING ON WILLIAMSON AVE.



▼ FIGURE 2.6: PARKING ON LEBANON AVE.



PUBLIC SPACES, PARKS, & GREENWAYS

The Downtown core currently lacks permanent public spaces and open green spaces. Several larger green spaces and plazas are located on the University property; however, they are not situated in a manner to strengthen public gathering. Over the past couple of years the Town has developed several temporary public spaces to increase activity in Downtown. The Town has converted on-street parking spaces on N. Williamson Avenue, W. College Avenue, and W. Lebanon Avenue for outdoor gathering space and seating by utilizing road blocks as shown in the photos on the right. These spaces are being utilized for cafe tables and seating outside of restaurants in Downtown. The temporary space on W. College Avenue at N. Williamson has been closed for the past 3 years and temporary seating was added during COVID to provide for outdoor dining. The location has also been used for the Town's Music 2 Dine 2 program, Menorah Lighting, Hometown Christmas and Social District Block Party.

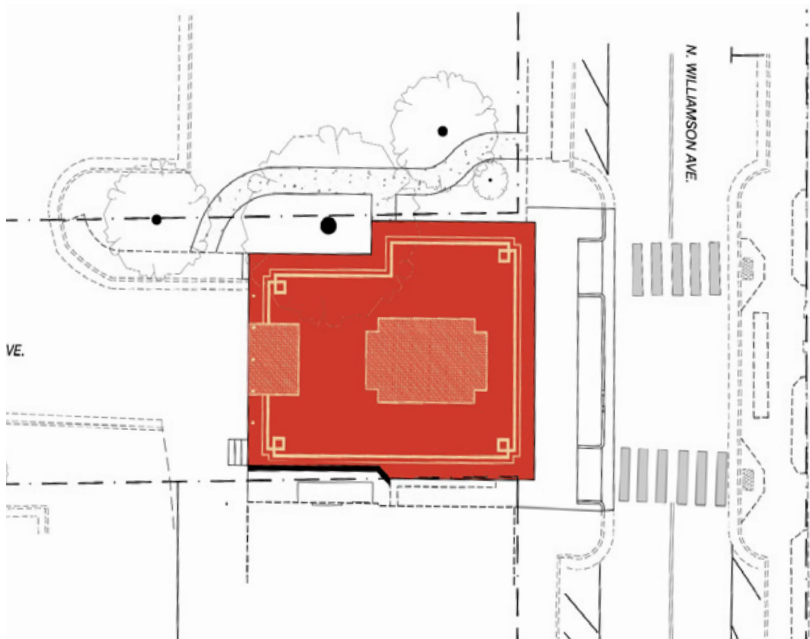
▼ FIGURE 2.7: TEMPORARY PUBLIC SPACES



PLANNED PUBLIC GATHERING SPACE

The Town of Elon and Elon University have partnered to build a permanent Plaza downtown on W. College Ave. and N. Williamson Ave. The plaza will include dining tables and umbrellas and a stage area with power for musical performances. It will be completed by the end of November/early December 2023.

▼ FIGURE 2.8: CONCEPTUAL PLAN FOR ELON PLAZA



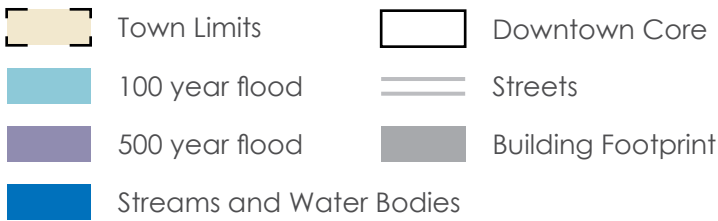
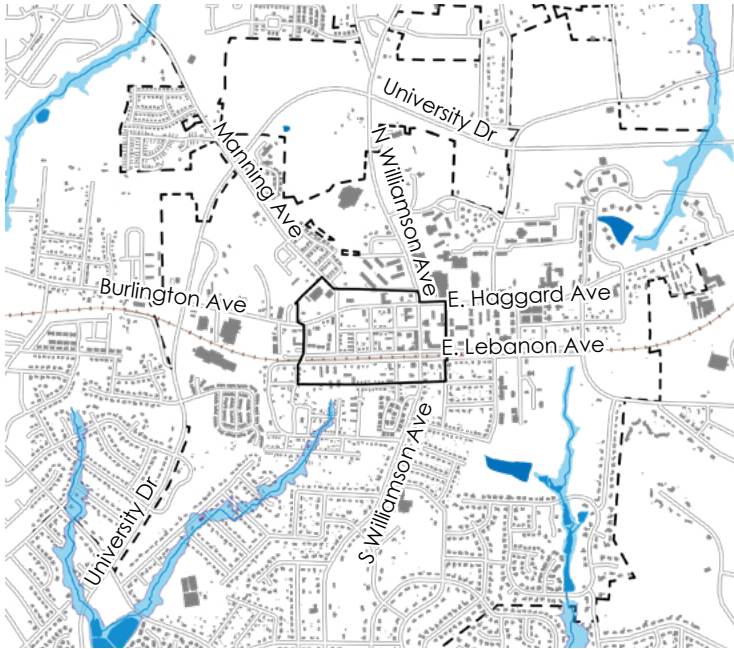
▼ FIGURE 2.9: CONCEPTUAL DESIGN



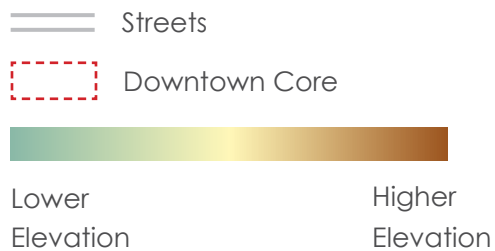
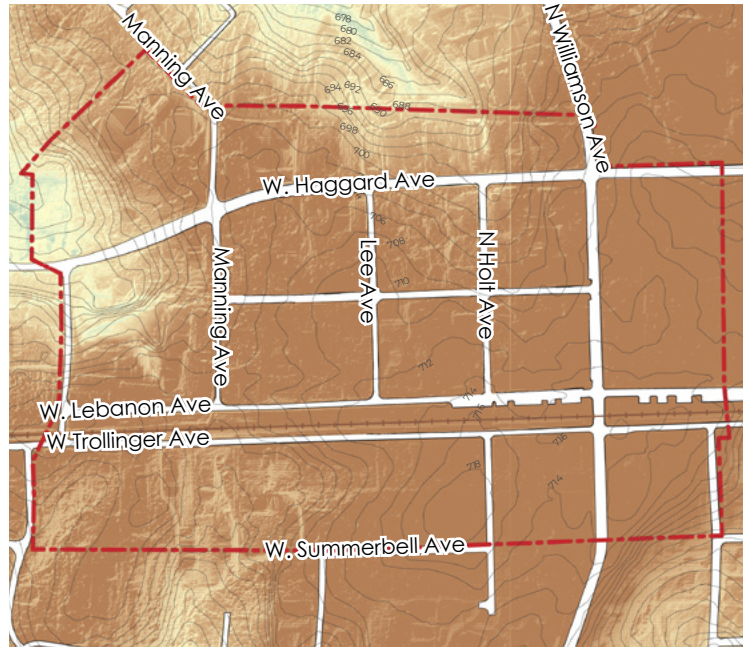
ENVIRONMENTAL CONSIDERATIONS

Downtown Elon is located in the higher elevation area of the Town with the highest points in Downtown at the corner of W. Summerbell Avenue and S. Holt Avenue. The lowest points are located along the northern and western edges of the study area. With a total elevation change of 28 feet, Downtown Elon is fairly flat; however, because of the Downtown's higher elevation, all of the floodplains in the Town are located outside of the Downtown study area.

▼ MAP 2.12: WATER AND FLOOD ZONES (2022)



▼ MAP 2.13 TOPOGRAPHY



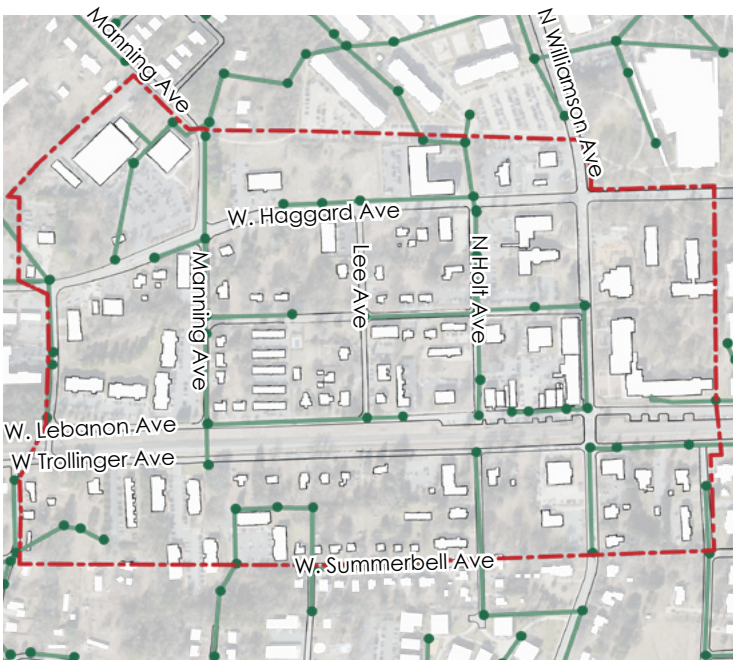
INFRASTRUCTURE

Downtown Elon is well serviced by water and wastewater service. Main water lines run along all of the major streets within the Downtown core including a line running down N. Williamson Ave. Downtown Elon also has sewer mains running along most of the major streets. Several gaps exist in the sewer main, notably along N. Williamson from Haggard Ave to College Ave and along Lee Ave from W. Haggard Ave to W. Lebanon Ave. The water and sewer availability in Downtown is sufficient to serve existing and future development.

The Town also has significant stormwater infrastructure in accordance with the EPA's National Pollution Discharge Elimination System Phase II Stormwater Program. As stormwater runoff increases with the amount of impervious surfaces such as paved parking lots and buildings, downtown areas can have significant stormwater discharge. The Town has put in several stormwater pipes in the Downtown study area, mostly along W. College Avenue and N. Holt Avenue, to help manage and divert stormwater run-off. As development increases along N. Williamson Avenue and W. Lebanon Avenue as well as on the southern side of the railroad tracks, additional stormwater infrastructure will most likely be needed. New developments should also follow best management practices to ensure that stormwater run-off is minimized.

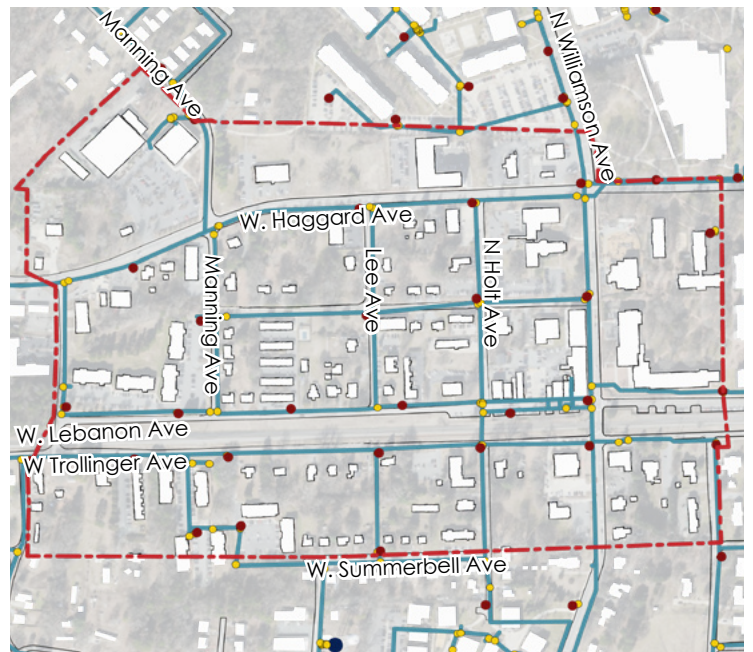
Good street lighting increases visibility on roadways and along sidewalks, improving public safety. The downtown core has a sufficient number of overhead streetlights. However, pedestrian lights are mostly present on W. Haggard Avenue and N. Williamson Avenue. As both of these streets are on the edge of University property, they have an observed higher amount of pedestrian traffic. New development within downtown should encourage additional pedestrian streetlights to provide safe and clear movement around the entire area.

▼ MAP 2.14: SEWER LINES AND MANHOLES



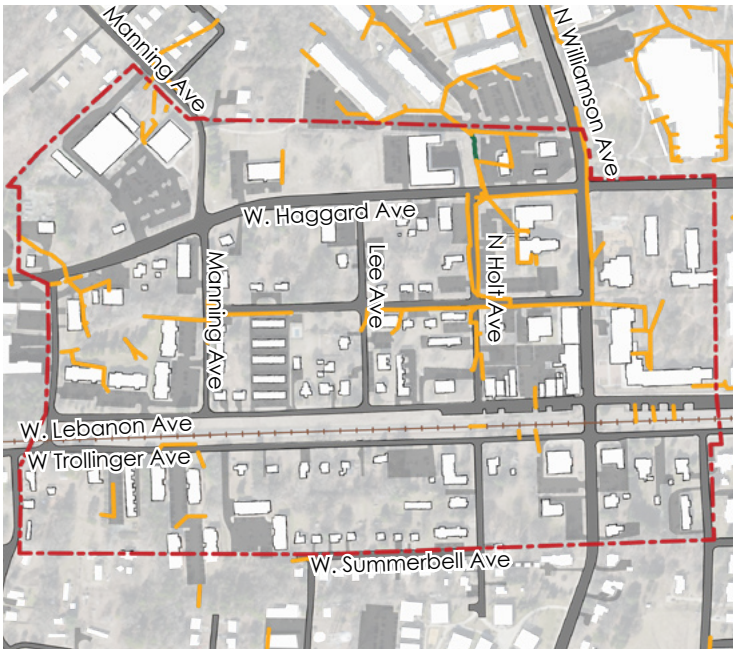
- Sewer Main
- Sewer Manhole




▼ MAP 2.15: WATER LINES AND VALVES



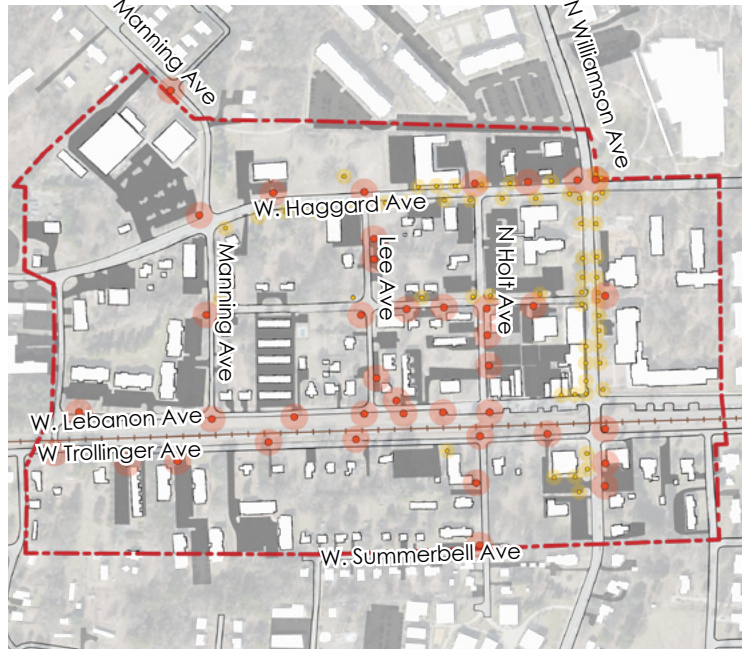
- Water Main
- Water Valve
- Hydrant

MAP 2.16: STORMWATER



-  Parking Lots
-  Stormwater Pipe
-  Stormwater Channel

MAP 2.17: STREET LIGHTS






-  Parking Lots
-  Pedestrian Streetlight
-  Overhead Streetlight

FIGURE 2.10: STORMWATER CHANNEL ON HOLT AVE



FIGURE 2.11: DOWNTOWN ELON-STREETLIGHTS



CULTURAL AND HISTORIC RESOURCES

HISTORIC DISTRICTS & RESOURCES

The section of Elon University along N. Williamson Avenue is part of a historic district. The boundaries of this district align with the original campus core when the university was founded in the 19th century. The area, known as Elon College Historic Neighborhood, now houses six residence halls for students. The three commercial buildings located at 100-104 N. Williamson Avenue were built in the 1890s and originally housed the Town Hall, town post office, and general store. The buildings are of brick construction, and include features such as cast iron columns, arched windows, and brick detailing at the parapet walls. Although not a formal historic district, the three buildings are recognized in the Alamance County Architectural Inventory and have the potential, along with other downtown buildings, for the National Register of Historic Places.

SOCIAL DISTRICT

In 2021, the North Carolina General Assembly enacted legislation to allow alcohol to be taken outdoors between participating and licensed establishments. The Town of Elon became the first town in Alamance County to establish a Social District with these new rules. The Town of Elon Social District includes the area along W. Lebanon Avenue, N. Williamson Avenue, and the corner of W. College Avenue. Businesses within this district display 1 of 3 stickers noting their individual rules: Drinks Sold Here, Drinks Welcome, and No Drinks Please. In order to regulate the district, alcoholic beverages must be purchased from a Downtown restaurant or bar and be in a Social District cup.

▼ FIGURE 2.12: 100 N. WILLIAMSON AVENUE



▼ FIGURE 2.13: ELON UNIVERSITY HISTORIC DISTRICT (THE GATE)



▼ FIGURE 2.14: ELON SOCIAL DISTRICT SIGNAGE

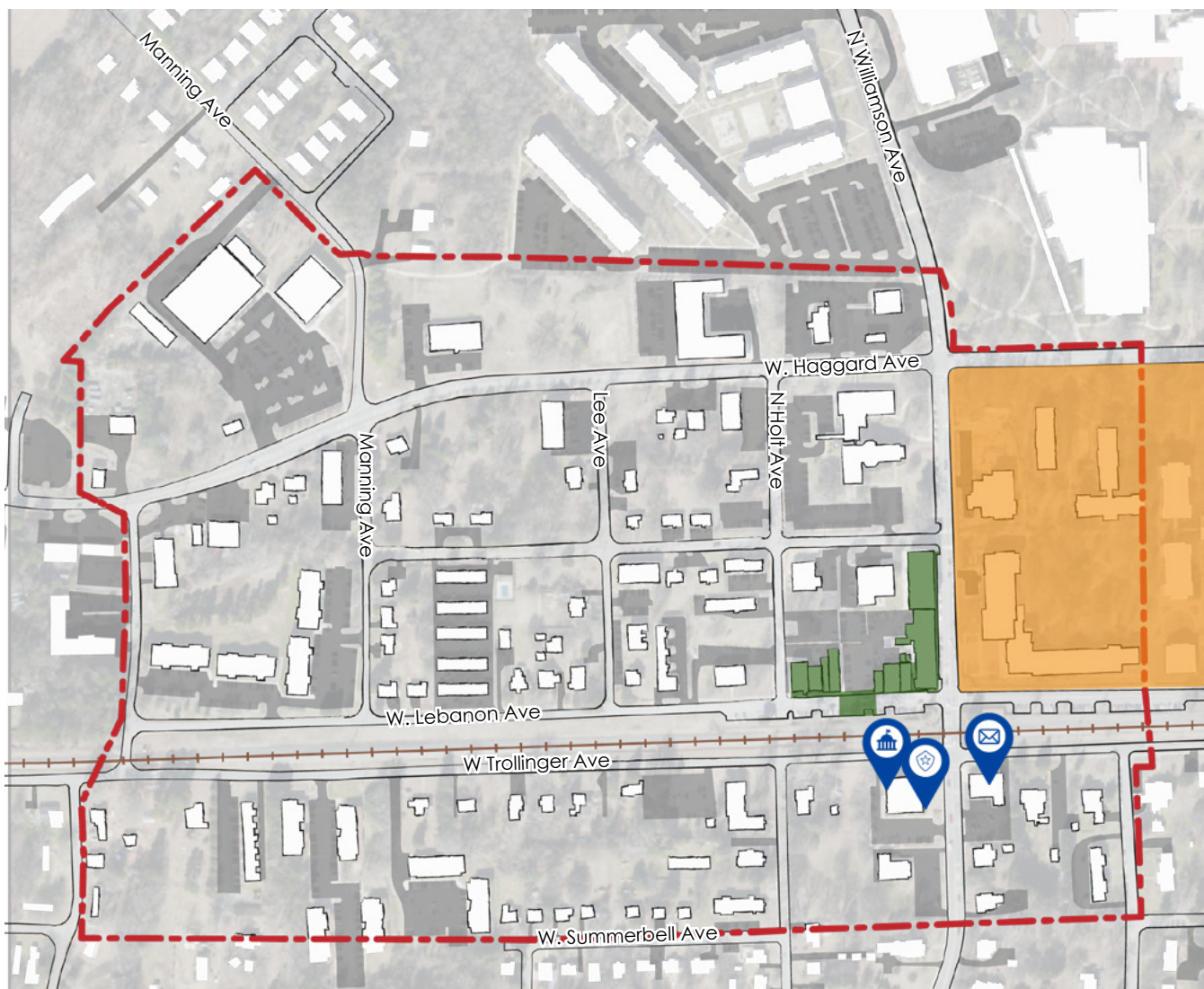







GOVERNMENT STRUCTURES

The civic/ government buildings in Elon are concentrated south of the Railroad tracks around the intersection of Trollingier and Williamson Avenues. Town Hall and the Town of Elon Police Department are currently located in the same building. This building is nearing maximum capacity and a new facility will be needed in the coming years. The other civic building is a United States Postal Service facility. According to the community survey, 37% of respondents come to Downtown to access the post office.

The map below highlights the location of the two districts within the study area as well as the location of the Town's civic buildings.

▼ MAP 2.18



-  Streets
-  Downtown Core
-  Building Footprint
-  Parking Lots
-  Social District
-  Historic District

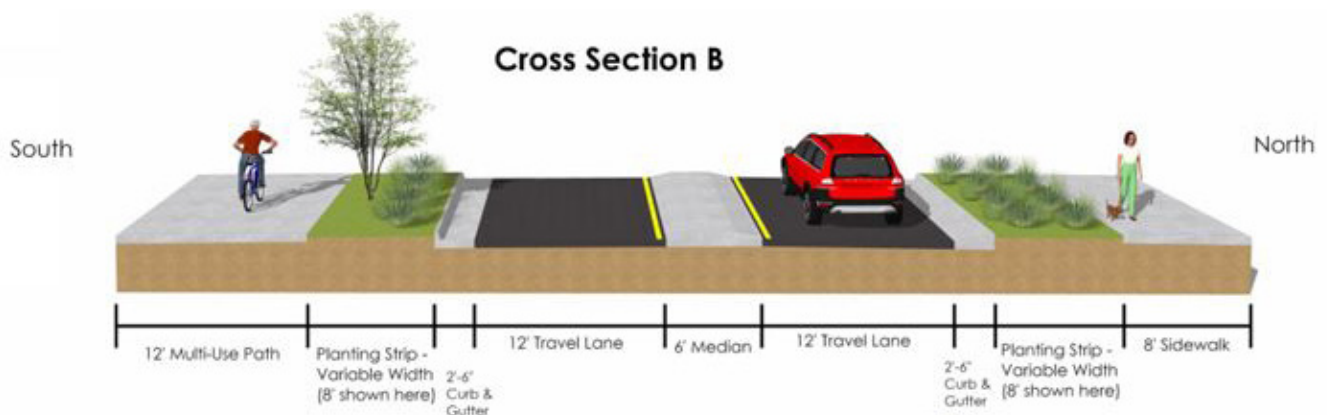
RECENT PROJECTS AND PLANNED IMPROVEMENTS

The Town of Elon and Elon University have recently completed or are planning to complete several projects throughout town. As mentioned previously, the Town is working towards building a plaza at the corner of N. Williamson Avenue and W. College Avenue. This plaza will provide permanent space for community events and social gatherings. The other previously mentioned project is the expansion of parking along W. Lebanon Ave. These new parking spaces will help meet demand for parking downtown.

In addition, the Town recently adopted the Haggard Avenue Corridor Plan. The planning process, which began in 2020, included three phases. The purpose was to examine ways to improve the safety and multi-modal connectivity of East And West Haggard Avenue through the Town. This study was a recommendation from the Town of Elon's 2014 Comprehensive Land Use Plan, which recommended improving gateways into Town. Some of the recommendations along Haggard Avenue from Manning Avenue to Williamson Avenue are listed below:

- Reduce the speed limit to 25 mph
- Reduce from 3 lanes to 2 lanes and incorporate a 6' median
- Add a 12' multi-use path and 8' planting strip to the south side of the road
- Addition of a downtown parking deck

▼ FIGURE 2.14 PROPOSED CROSS SECTION FOR HAGGARD AVE



KEY THEMES AND FINDINGS

The Downtown Assessment process culminated in establishing a list of key themes and findings that were used to guide discussions during the Downtown Workshops in Phase 2. The key themes and findings were organized by the following:

- Williamson Avenue Placemaking
- Parking
- Events
- Entertainment
- Retail/Restaurants
- Destinations
- Infrastructure
- Transportation
- Housing
- Development
- University

WILLIAMSON AVENUE PLACEMAKING

During the process, it was observed that the Town's adjustments made to the N. Williamson Avenue streetscape in response to COVID demonstrated a strong demand for outdoor seating on the sidewalks in downtown. The temporary removal of the parking to create these seating areas has been appreciated by residents and business owners. Although not all business owners were interviewed during the assessment, a general sentiment of support for wider sidewalks on N. Williamson Avenue was expressed. Business owners, students, and residents have adjusted to the parking being removed and liked the idea of more space for outdoor seating, space for healthy street trees, and pedestrian lighting. However, almost everyone agreed that on-street parking should remain along the university side of the street. In addition to the temporary outdoor seating areas, the temporary plaza at W. College Avenue became a welcomed addition. And, as mentioned earlier, the Town expects construction on a permanent plaza at this location to be completed by the end of the year. An opportunity exists to identify ways to activate the space year-round.

▼ FIGURE 2.15 TEMPORARY SEATING AREA (2022)



▼ FIGURE 2.16 BARRIERS AFTER PAINTED (2023)



PARKING

Parking in downtown was at or near the top of everyone's list from the interviews and the survey. A need exists for more of all types of parking. During the school year, students take up a lot of the on-street spaces and do not seem to be too concerned about paying the tickets. Parking for employees has to be regularly monitored to prevent students from parking in those areas as well. One solution brought up by some of the business owners was paid parking during the day that might become free after 6pm and on the weekends. However, the idea of paid parking was not supported by respondents to the survey. Others expressed that one hour of parking was not long enough to enjoy a meal during the day.

▼ FIGURE 2.17 ONE HOUR PARKING AREA



EVENTS

Residents expressed a desire for more events and opportunities to gather in downtown. People talked about opportunities to expand the Farmer's Market and were excited about the approval of the Social District. Related to parking, the University makes a number of its spaces in downtown available during events to help ease the high peak demands. While events planned at the University bring people downtown, some businesses felt they were not always prepared for the rush of customers during those events due to lack of awareness.

▼ FIGURE 2.18 FARMER'S MARKET



ENTERTAINMENT

Currently, there are very limited choices for underage college students in downtown. Students and residents agreed that more options and opportunities were needed for the University's students to experience in downtown. In addition, people who responded during interviews and through the survey indicated that more opportunities were needed for younger children in downtown as well. The Elon Community Church has a playground that is open for use, but not everyone visiting downtown is aware of that opportunity. Some people mentioned that expanded offerings at Lawrence Slade Park could help and that a skate park or amphitheater could be nice additions to downtown for recreation and entertainment.

RETAIL /RESTAURANTS

Survey respondents have indicated they would like to see more retail and restaurants in downtown; however, ground level vacancies and opportunities to open a new business to meet this demand is very limited. With this low supply of space, rents downtown may be higher, which is a hurdle for opening a new restaurant or retail establishment. A local restaurant closed on Haggard, but the space is not small enough to attract a smaller food and beverage start-up. During the interviews, students and residents felt a small convenience store / pharmacy would be a great addition to downtown.

▼ FIGURE 2.19 LARGE FIRST FLOOR RESTAURANT SPACE ON HAGGARD AVENUE



DESTINATIONS

Many of the survey respondents and some of the interviewees, noted that downtown is often seen as just a place for the students. It was pointed out that a destination such as a library or similar use could provide a new destination for downtown. A number of people suggested that the Turner Theater within the Dwight C. Schar Hall could potentially be open more often to the public, creating another destination in downtown. The Turner Theater is a 220-seat movie theater with a connection to Citrone Plaza, which fronts on North Williamson Avenue.

▼ FIGURE 2.20 TURNER THEATER



INFRASTRUCTURE

Although it is still in operational order, downtown has the oldest water and sewer infrastructure in the town. It is scheduled for being replaced over the next few years along Williamson Avenue. The replacement of the lines on Williamson will present an opportunity to consider making some of the temporary seating areas permanent within a new streetscape design for Williamson. Since the roads surface will need to be removed to get access to the utility lines, this will be the best opportunity for the town to implement a new design for Williamson Avenue. As described earlier, since downtown is on the high ground, more development can cause flooding in other areas of town. The stormwater infrastructure should continue to be a major consideration moving forward.

TRANSPORTATION

Downtown's thrive on non-vehicular modes of travel. In Elon, pedestrians and bicyclist are in constant movement, particularly students as they move about between the University and downtown. As transportation projects and studies move ahead, opportunities to expand the pedestrian network and create safe routes for bicycles should remain a priority. Opportunities for more mobility options will help decrease student and resident dependency on cars when traveling to and around downtown. In addition, one major facility improvement for strong consideration is the Williamson Avenue crossing of the NC Railroad Company tracks. A much safer at-grade crossing for pedestrians is needed at this location.

▼ FIGURE 2.21 RAILROAD CROSSING



HOUSING

A number of the survey respondents and interviewees indicated a need for new housing options in and around downtown. Most faculty at the University do not live in Elon. Of the non-student housing, more affordable housing opportunities for Town and University staff is not readily available. A number of people thought an opportunity existed to create more student housing in the core of downtown, while others felt there was also a need for 55+, but not directly located next to student housing. The market analysis identified a general demand for approximately 160 to 210 new housing units within downtown.

DEVELOPMENT COMMUNITY

Interviews with the development community raised a number of observations and questions. In general, one of the questions raised concerned the need for a Special Use Permit for any project over 30,000 square feet. This is a topic that could be addressed during the ordinance updates. Also, there was general discussion about the appropriate height limit for downtown. The most common mixed use building type is the podium style, which includes a concrete first level with commercial oriented uses and five stories of wood frame construction above for residential use. Some of those interviewed questioned if the four story height limit was enough to accommodate the mixed use 5+1 model. These interviews also discussed how public amenities, such as a signature public space, could help attract new development. And finally, a number of people believed there was an opportunity to market Elon and generate a broader interest from developers outside of the immediate area.

UNIVERSITY

The University is in the process of finishing up its new campus master plan. The overall goal is to steadily grow by about 100 students annually. The University is very supportive of downtown and recognizes its importance in off-campus student life and the overall marketing of the University. The University expressed that it is interested in seeing downtown become a year-round activity center that can help attract staff and faculty to live, work, and play. The town-gown relationship is continuing to grow and the two entities have been able to accomplish many shared goals. The University remains interested in working with the Town on a new streetscape for North Williamson Avenue and is a current partner with the Town on the development of the new plaza on West College Avenue.

VISION FOR THE FUTURE

The survey and the interviews uncovered a number of desires for the future of downtown. The ideas expressed during the assessment helped provide a framework for the Downtown Workshops held in Phase 2 of the planning process. The key ideas about the future are outlined below.

COMPONENTS OF THE VISION FOR THE NEXT 10 YEARS

- **More Community Gathering Spaces**
- **Expanded Parking**
- **Recreational Opportunities**
- **Downtown Library / Museum**
- **Fix Traffic, Pedestrian Environment, and Infrastructure**
- **Aesthetic Improvements**
- **More Shops, Restaurants, and Small Businesses**
- **Year Round Housing**
- **More Coordination with the University**



3

MARKET ANALYSIS

MARKET CONDITIONS

The Town of Elon is positioned within Alamance County on the border of Guilford County and in close proximity to interstate 40. This unique geographic position along with the university population present a variety of economic and market trends that impact employment and industry in Downtown. The Market Analysis study examined demographic, employment, and real estate profiles for the Tri-Metro Region, Alamance County, the Elon Market Area, and the Downtown Study Area. A description of each area is outlined below with maps of the areas displayed on the next page.

Tri- Metro Region

The Tri-Metro Region is the most macro scale in which the market was analyzed for this study. This geographic region includes the Greensboro-high Point NC Region, Burlington NC Metropolitan Statistical Area, and the Durham-Chapel Hill Metropolitan Statistical Area. Combined, these areas make up nine counties within North Carolina and provide insight into the greater regional trends and influences that might impact Downtown Elon.

Alamance County

The Alamance County analysis included the county level defined boundaries for Alamance County. County level data serves as an important comparison point for certain socio-economic variables. Based on 2010 census data, Alamance County is considered a Metropolitan Statistical Area; however, updated definitions of these areas have not yet been released for 2020 census data

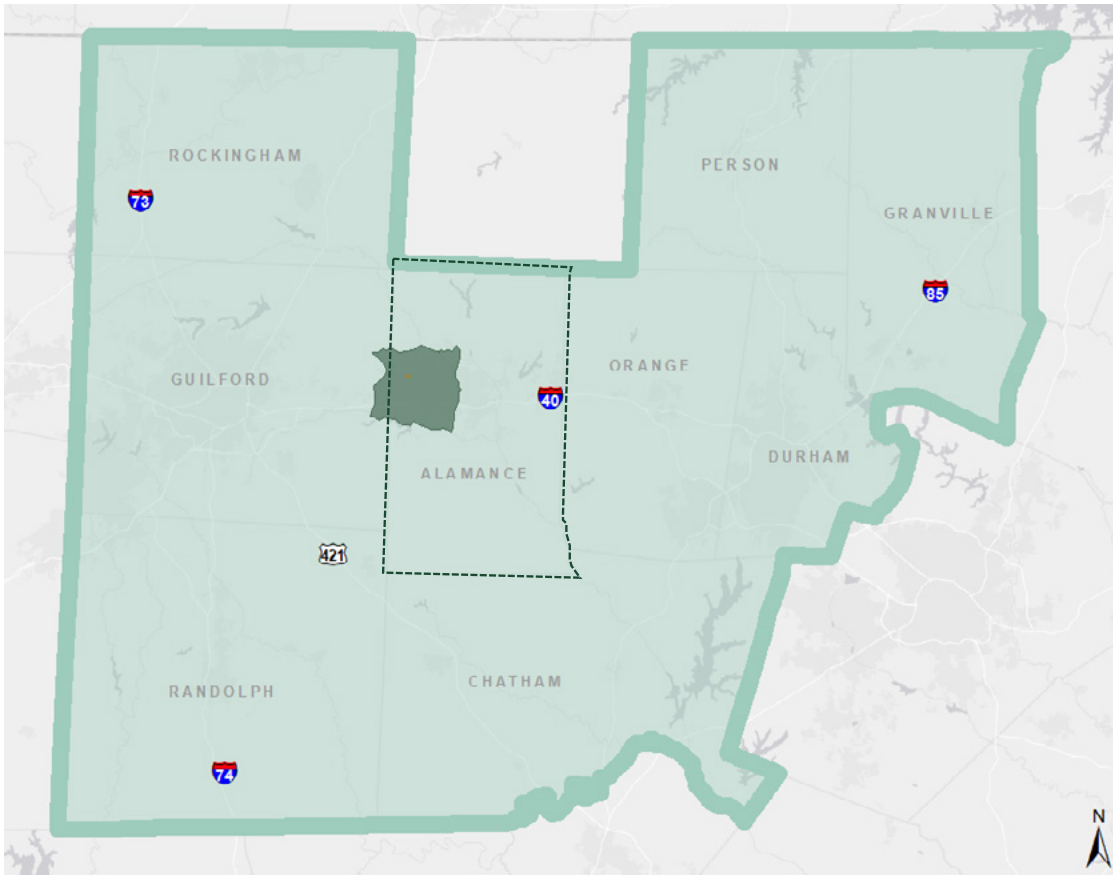
Elon Market Area

The Elon Market Area includes portions of both Alamance and Guilford Counties. This geographic area defines immediate real estate considerations that could influence growth and development in the downtown area. The boundaries of this area is made up of natural and man-made barriers, competitive real estate properties, and commuting patterns.

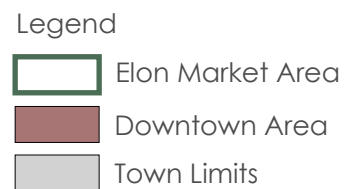
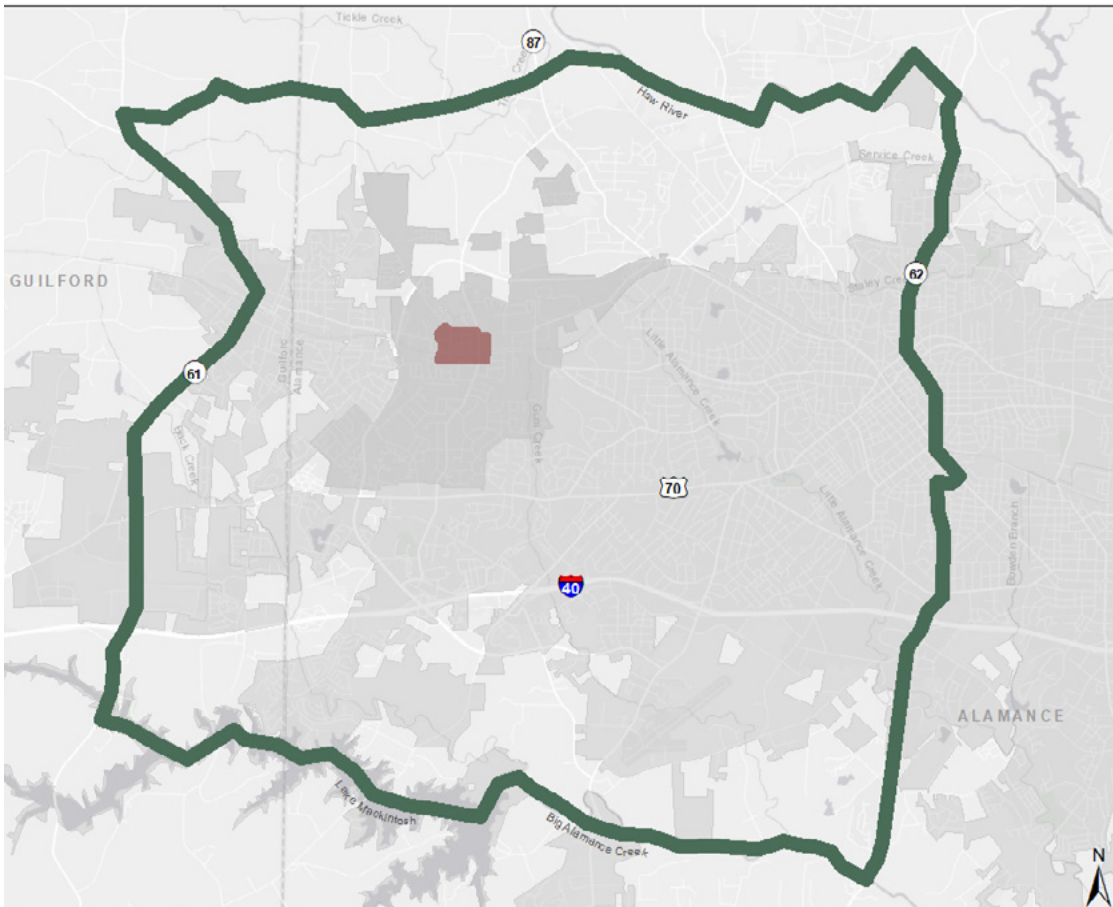
Downtown Study Area

The Downtown Study area is centered around the downtown area. The boundaries extend slightly beyond the study area previously defined and includes Church Street to the west, Commons Drive to the North, Atkinson Avenue to the East, and Summerbell Avenue to the West.

▼ MAP 3.1: TRI-METRO REGION AND ALAMANCE COUNTY GEOGRAPHIC BOUNDARIES



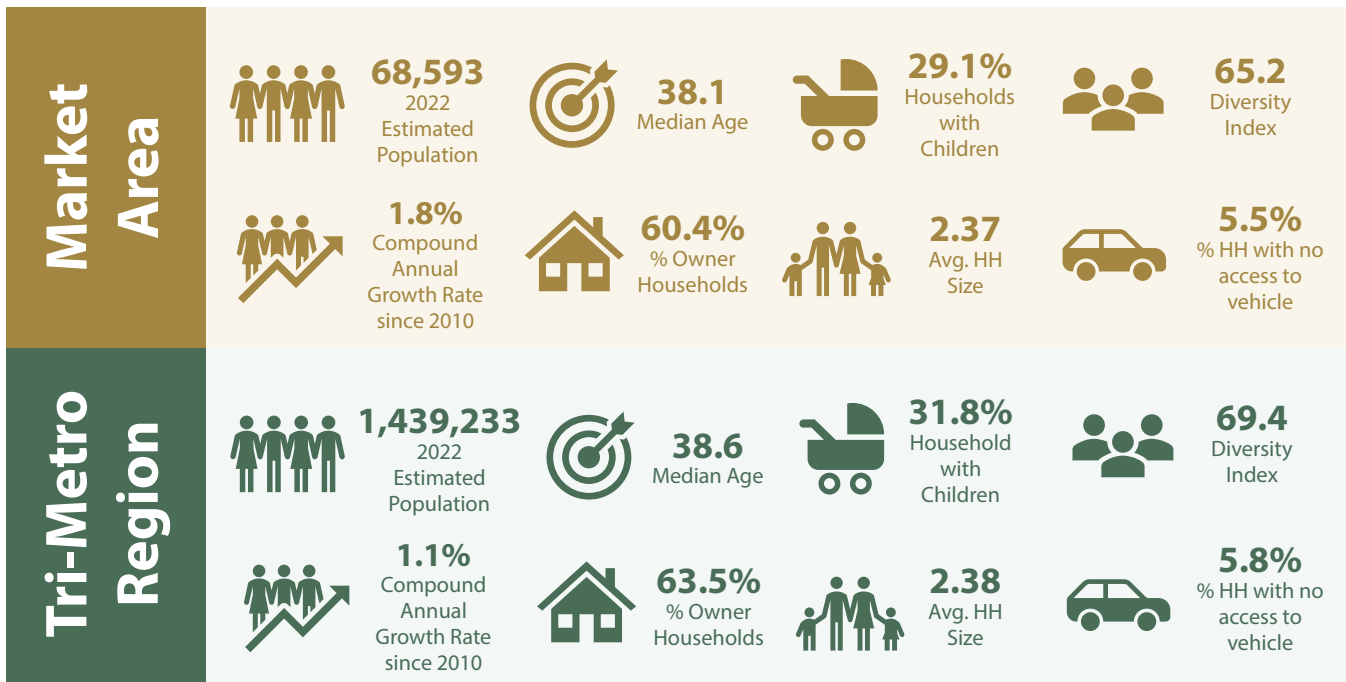
▼ MAP 3.2 ELON MARKET AREA AND DOWNTOWN STUDY AREA GEOGRAPHIC BOUNDARIES



DEMOGRAPHIC OVERVIEW

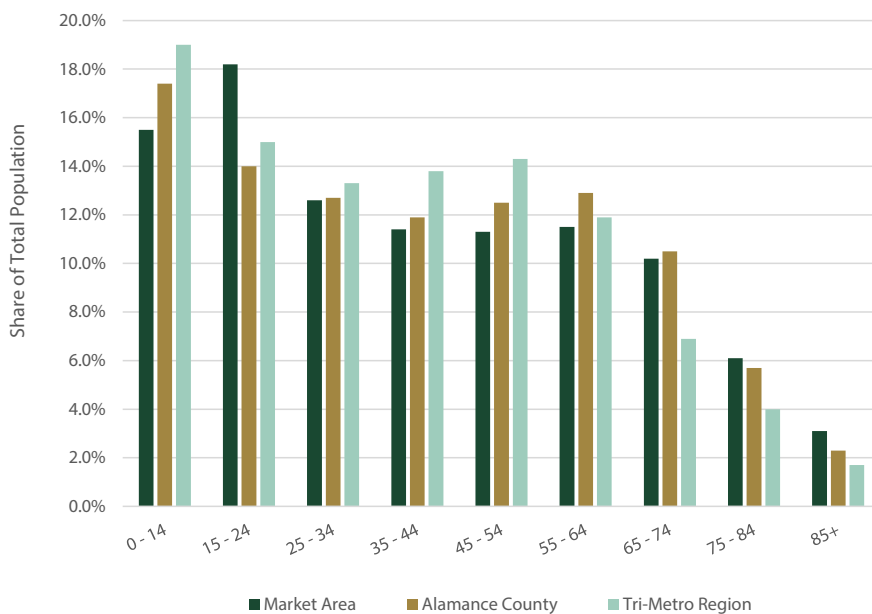
Overall, the demographics within the Elon Market area are similar to the demographics of the greater Tri-Metro region. The median age of both areas is 38 with around 30% households with children and an average household size of 2.3. The market area has a slightly lower percentage of owner occupied housing at 60.4%, which is likely a reflection of the student population. The market area is growing at a slightly faster annual growth rate since 2010 at 1.8%. The diversity index of the market area is slightly less than the Tri-metro at 65.2, where 100 represents equal distribution of all races and ethnic groups within an area.

▼ FIGURE 3.1 DEMOGRAPHIC OVERVIEW COMPARISON 2022



▼ FIGURE 3.2 COMPARISON OF POPULATION SHARES BY AGE, 2022

Source: ESRI BAO



Driven by the presence of Elon University, residents aged 15-24 made up 83% of the Study Area population in 2022.

▼ FIGURE 3.3 COMPARISON OF POPULATION TRENDS 2010-2020

Source: ESRI Business Analyst Online (BAO)

Area	2010	2022	2010-2022 Δ		
			#	%	CAGR
Study Area	453	586	133	29.4%	2.2%
Market Area	55,587	68,593	13,006	23.4%	1.8%
Alamance County	151,126	176,119	24,993	16.5%	1.3%
Tri-Metro Region	1,439,233	1,632,323	193,090	13.4%	1.1%
Market Area % Region	3.9%	4.2%	6.7%		

▼ FIGURE 3.4 COMPARISON OF MEDIAN HOUSEHOLD INCOME, 2022

Comparison of Median Household Income, 2022

Source: US Census; ESRI BAO



Driven by the presence of Elon University, residents aged 15-24 made up 83% of the Study Area population in 2022.

▼ FIGURE 3.5 COMPARISON OF HOUSEHOLD TRENDS

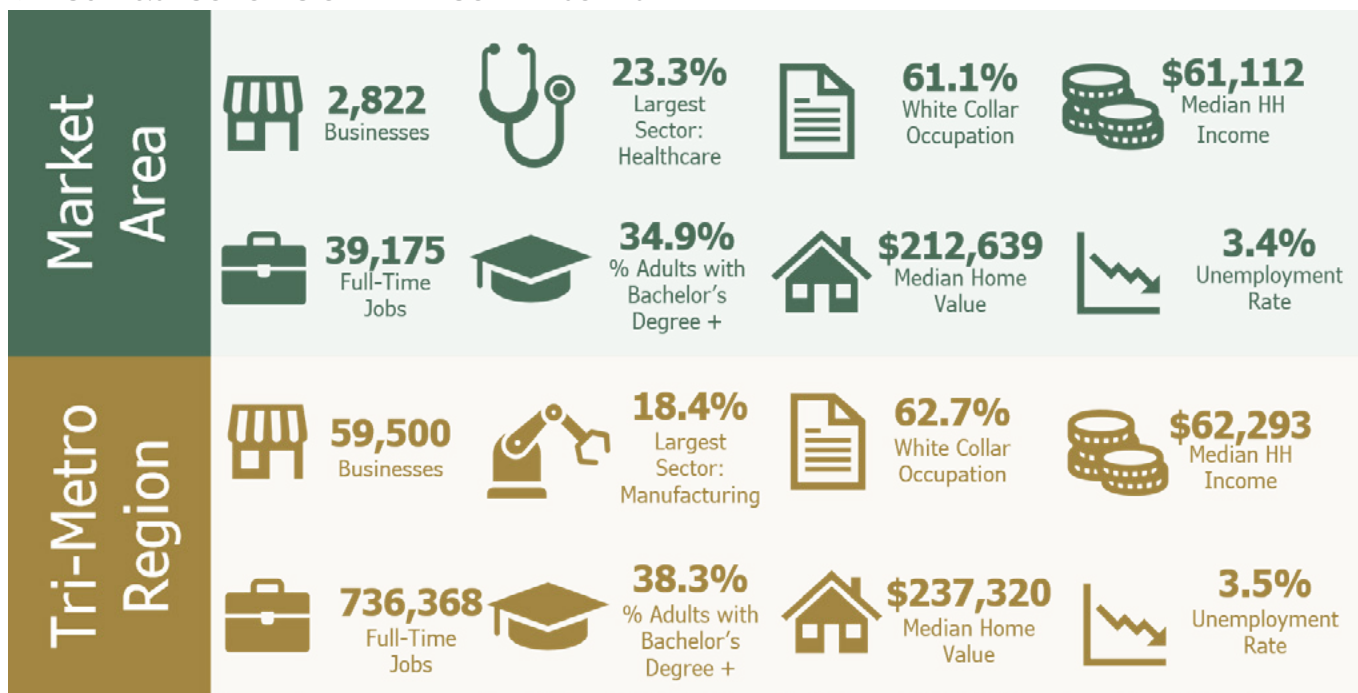
Source: ESRI BAO

Area	2010	2022	2010-2022 Δ		
			#	%	CAGR
Study Area	113	95	-18	-15.9%	-1.4%
Market Area	22,400	26,756	4,356	19.4%	1.5%
Alamance County	59,959	69,892	9,933	16.6%	1.3%
Tri-Metro Region	573,774	657,161	83,387	14.5%	1.1%
Market Area % Region	3.9%	4.1%	5.2%		

ECONOMIC PROFILE

The economic profile within the Elon Market area is somewhat similar to the greater Tri-Metro region. The percentage of the population in each area with a bachelor's degree is very similar at 35% and 38% respectively. The percentage of white collar occupations is almost identical, while the median household incomes and unemployment rates are virtually the same. The two major differences across the two areas is the primary employment sectors and median home values. The largest employment sector in the Elon Market is Healthcare, while Manufacturing is the largest employment sector in the Tri-Metro Region. The median home value in the Tri-Metro Region is slightly higher than the Elon Market area.

▼ FIGURE 3.6 ECONOMIC OVERVIEW COMPARISON 2022



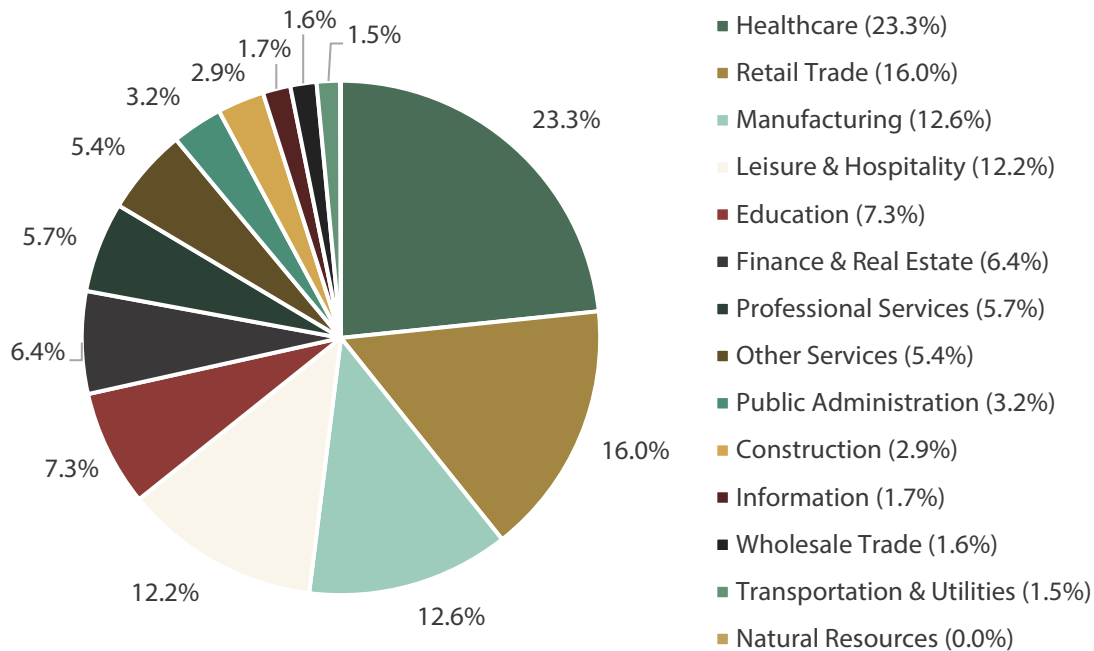
Job growth in the region has averaged 8,300 new jobs annually since 2011. Disruptions during the Great Recession and COVID-19 pandemic were consistent with national trends.

EMPLOYMENT SNAPSHOT

The Market Area currently has almost 40,000 jobs. Health Services represented the largest share of jobs in the Market Area. The next three largest sectors are Retail Trade (16.0%), Manufacturing (12.6%), and Leisure and Hospitality (12.2%). These three sectors comprise more than two-thirds of the jobs in the Trade Area.

The most recent trend data from the US Census's longitudinal employer-household dynamics data set indicates that the Market Area's employment base increased by approximately 5.0% over a five-year period between 2014 and 2019. The sectors with the strongest absolute growth during that time were: Construction, Education, Healthcare, Accommodation/ Food Services

▼ FIGURE 3.7 PLACE OF EMPLOYMENT BY INDUSTRY, MARKET AREA, 2022



COMMUTING PATTERNS

Based on the most recent data available on commuting trends, approximately 22% of the Market Area's workforce also reside within the Market Area. The remaining 78% of people working in the Market Area commuted in from outside the Market Area's limits. The most common places where workers live and commute from are:

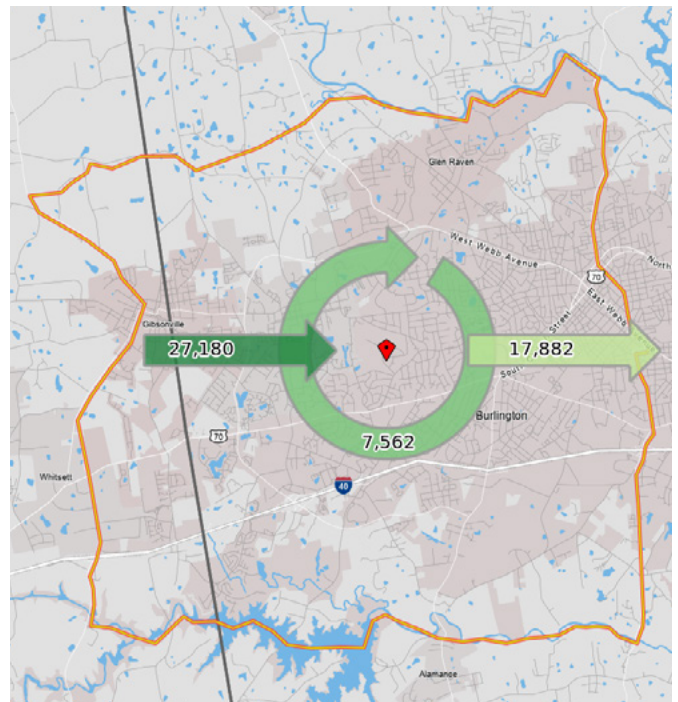
- Burlington (19.0%)
- Greensboro (7.9%)
- Graham (4.0%)
- Elon (3.4%)

Nearly 70% of Market Area residents are employed elsewhere. Employment destinations represent a balanced mix of eastern and western travel directions. The most common places where residents commute to are:

- Burlington (28.1%)
- Greensboro (11.6%)
- Durham (6.2%)
- Elon (4.3%)

Approximately 31% of employed residents commute beyond the most common destinations; however, the data is not available as the locations make up 1.5% or less of the total employed resident destinations.

▼ MAP 3.3 COMMUTING PATTERN, MARKET AREA, 2022
SOURCE: US CENSUS LEHD; KIMLEY-HORN

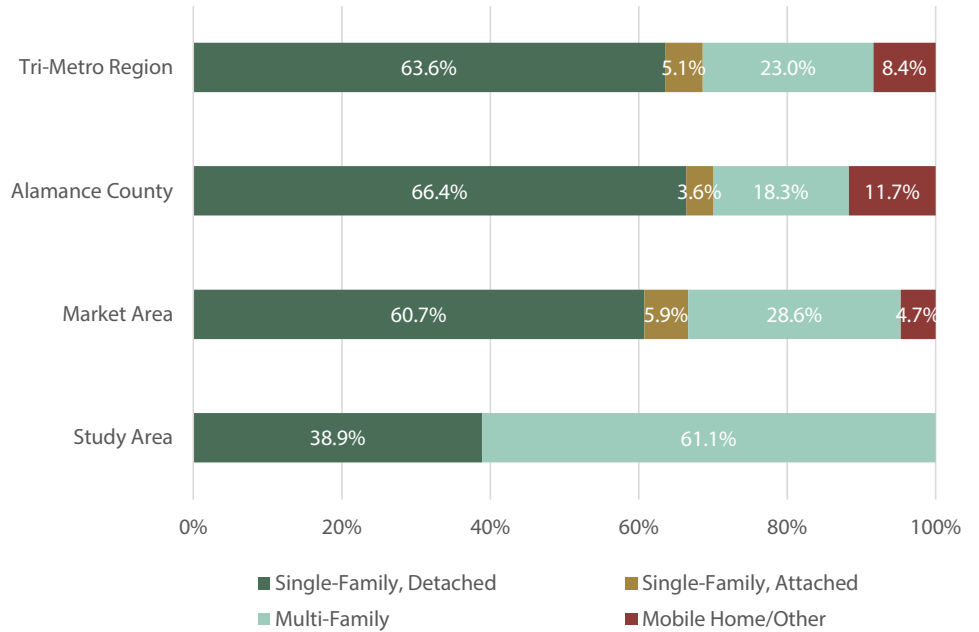


RESIDENTIAL PROFILE

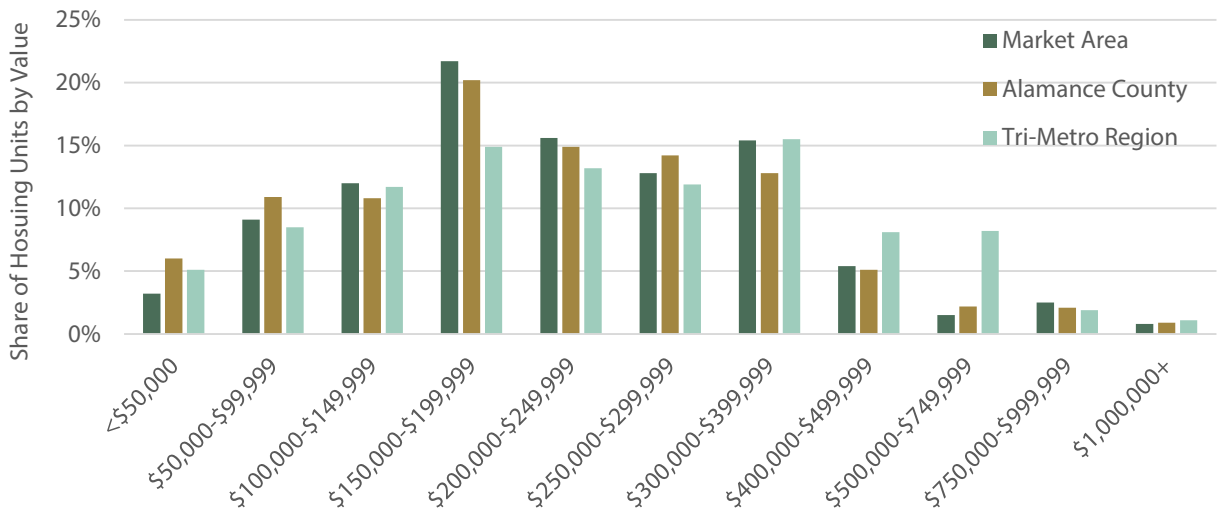
The Downtown Study Area housing inventory is heavily influenced by Elon University's student population, resulting in high levels of renter-occupancy & seasonally-driven vacancy and a large share of multi-family buildings. The Market Area generally follows a similar pattern as the county and region, with single-family being the dominant housing type for all three areas, followed by a smaller share of multifamily housing types.

Approximately 85% of the Study Area's limited housing inventory was constructed in the 1960s, 1980s, or 2000s. The most active decade for residential development in the Market Area was the 2000s, followed by the 1990s. This pattern is reversed for Alamance County and the Tri-Metro region, with the 1990s being the most active. The most common range for home values in the Market Area and County is \$150,000-\$199,999, while the largest range for the Tri-Metro region is \$300,000-\$399,999. Approximately 25% of the Market Area owner-occupied housing units are \$300,000+, compared with almost 35% in the region.

▼ FIGURE 3.8 HOUSING UNITS BY TYPE, 2022



▼ FIGURE 3.9 COMPARISON OF OWNER-OCCUPIED HOUSING UNITS BY VALUE, 2022



DOWNTOWN APARTMENT INVENTORY

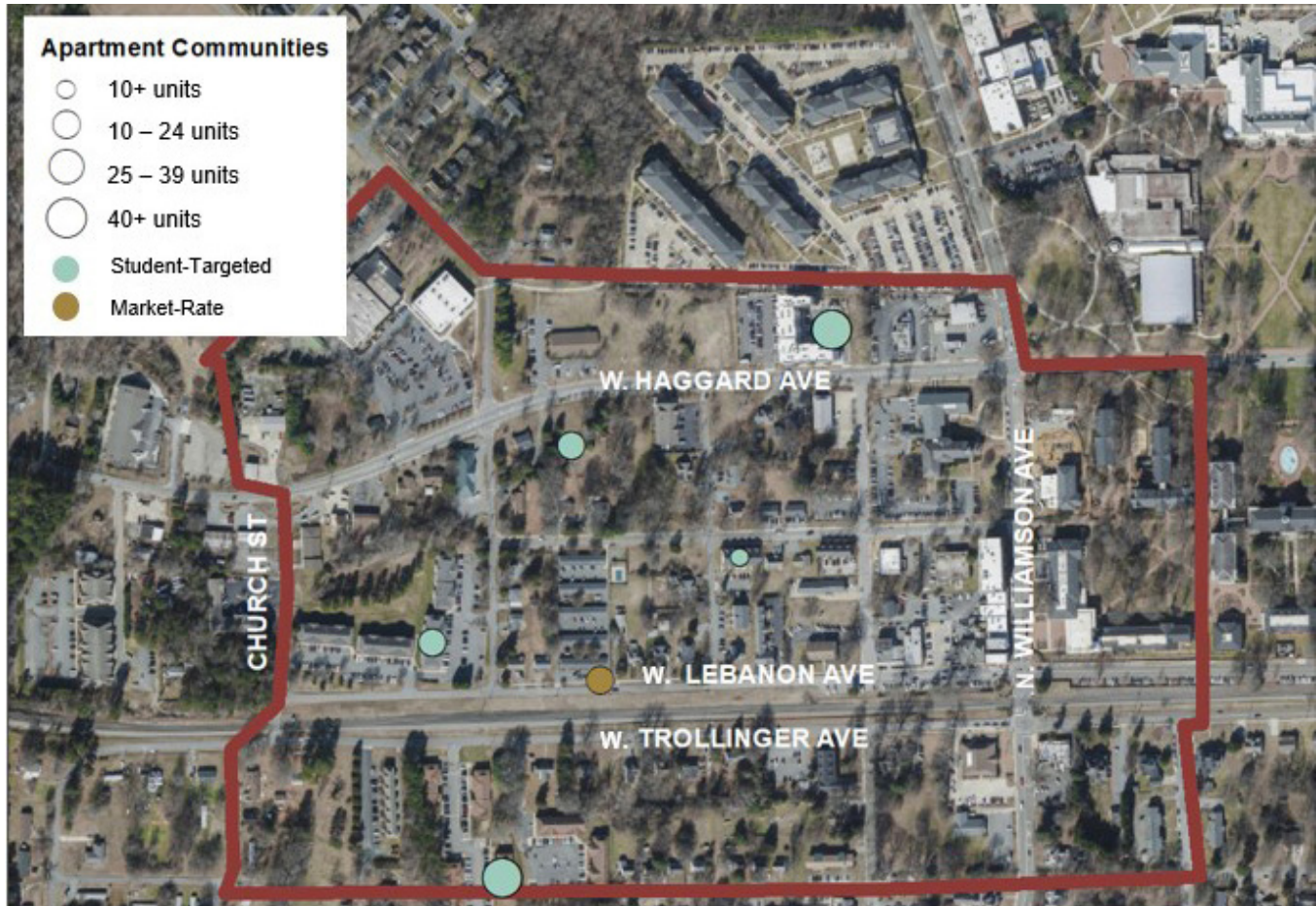
CoStar, which tracks commercial real estate, tracks one market-rate apartment building within the Study Area that was built in 1967 and contains 18 units. Due to its size, no performance trend data was available for analysis.

Additionally, five professionally-managed student housing apartment communities are located in Downtown Elon:

- There are a total of 139 units across the five properties
- They range in size from five units at College Place to 48 units at Trollinger Apartments
- The average 1,311-square-foot student apartment rents for \$1,326 per bed or \$3.35 per foot
- The newest development, The Park Place at Elon, was developed by a private developer in 2016 for the University and is under a master lease with the University for 43 units and ground floor retail space.



▼ MAP 3.4 APARTMENT COMMUNITIES IN THE STUDY AREA 2023



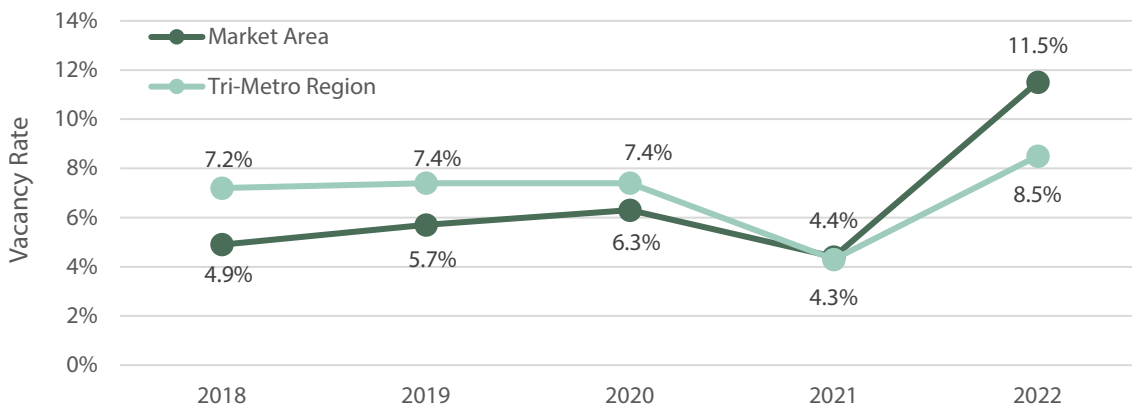
Trend data for market-rate apartment vacancy and rental rates was obtained from CoStar. Market-rate units are not age or income targeted and exclude student communities as they typically lease by the bedroom instead of the unit. Only one professionally-managed market-rate apartment community was in the Study Area. Given the limited product in Downtown Elon, trend data for the Market Area and Tri-metro region is provided. There were approximately 5,100 housing units in the Market Area, comprising 4.6% of the region's inventory.

Vacancy in the Market Area spiked in 2022, reaching 11.5%, due to increased levels of new construction in recent years coupled with slower leasing activity. A similar trend was also noted in the larger Tri-Metro region, where vacancy increased to 8.5% by year-end 2022, following a period of increased construction. Developers typically target vacancy rates of approximately 7.0% to signify a healthy market.

The Tri-Metro region has consistently reported a rent per square foot premium over the Market Area. As of 2022, the Market Area average rent per square foot of \$1.29 was 9.2% lower than the region's average of \$1.42.

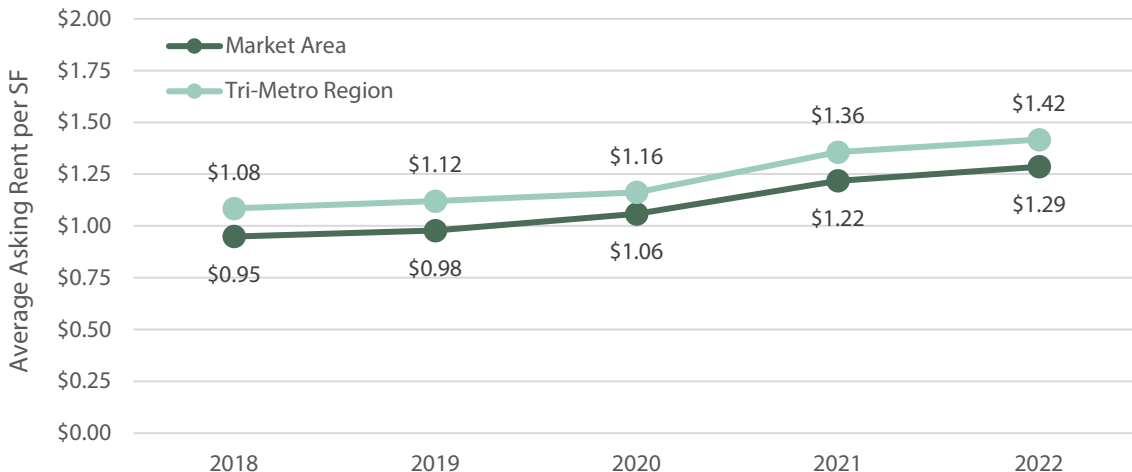
▼ FIGURE 3.10 COMPARISON OF MARKET RATE APARTMENT VACANCY TRENDS, 2018-2022

Source: CoStar



▼ FIGURE 3.11 COMPARISON OF MARKET RATE APARTMENT RENT PER SQUARE FOOT 2018-2022

Source: CoStar



RETAIL PROFILE

A total of 17 retail properties were identified within the Study Area, containing nearly 70,000 square feet of space. Most of the space is in the block immediately west of N. Williamson Avenue. Generally, rental rate data was not available for these properties, but occupancy is very high. The most recent development was built in 2011 and is anchored by Barnes & Noble.

▼ MAP 3.5 RETAIL PROPERTIES, STUDY AREA, 2023



Stakeholder feedback from property owners and tenants suggests that the prevailing rental rates per square foot for

retail space Downtown generally ranges from \$15.00 to \$25.00 per square foot depending on size, use, and location.

▼ FIGURE 3.12 EXAMPLE OF RETAIL PROPERTIES, STUDY AREA, 2023



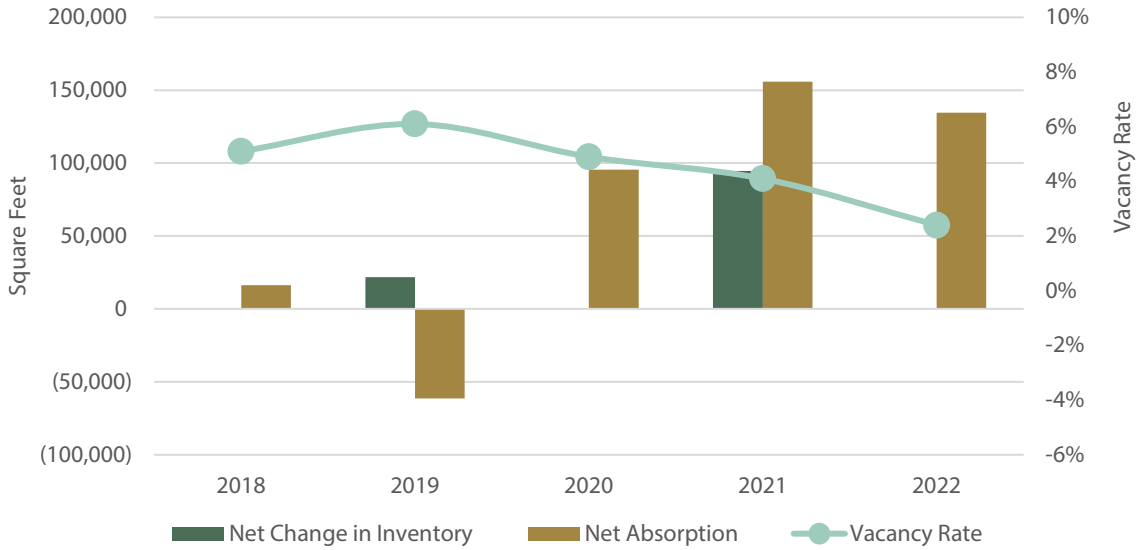
RETAIL PERFORMANCE TRENDS

The Market Area has added approximately 100,000 square feet of new retail space in the last five years. Leasing activity, or net absorption, has increased in recent years, resulting in a declining vacancy rate in the Market Area. As of year-end 2022, the retail vacancy was only 2.4%. The Tri-Metro region's vacancy was also low at 3.5%.

Average lease rates for retail space in both the Market Area and Tri-Metro region have converged since 2020, staying within 4-16 cents of each other. In both areas, the retail lease rates have increased strongly, reflecting increased demand with less new supply to accommodate it.

▼ FIGURE 3.13 RETAIL PERFORMANCE TRENDS, MARKET AREA 2018-2022

Source: CoStar



RETAIL GAP ANALYSIS

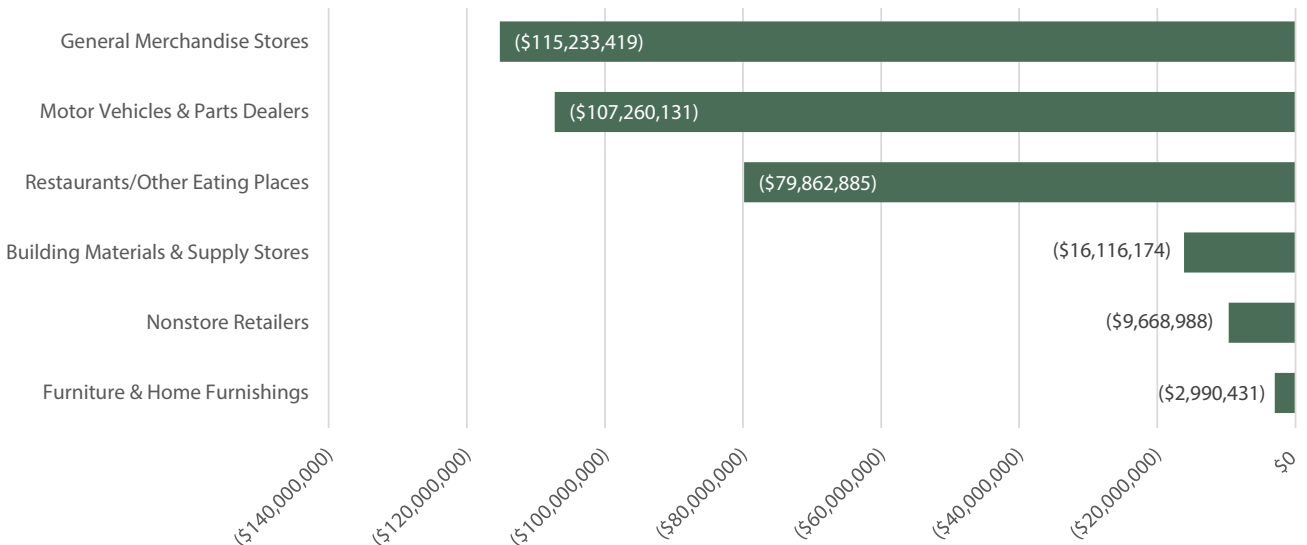
Retail gap refers to the difference between retail sales and retail purchases by residents within the same area. Retail sales in the Market Area surpassed consumer spending, which means that the Market Area attracts consumers from outside of the area seeking retail goods and services, resulting in an overall surplus of \$76.8 million. Much of this surplus is likely driven by the regional draw of shopping centers, including Alamance Crossing, that are located on or near the I-85 corridor, attracting visitors and people passing through the area. All retail industry groups in the Market Area reported a surplus in sales. The three groups with the largest and smallest surpluses are shown below.

Stores Sold
\$1.38 billion

Consumers Spent
\$779 million

Retail Surplus
\$76.8 million

▼ FIGURE 3.14 RETAIL GAP ANALYSIS BY SECTOR, MARKET AREA, 2021



OFFICE PROFILE

Three office properties were identified within the Study Area, containing a total of 18,595 square feet. Two of the three are owned or leased by Elon University. The third property is owned and maintained by AT&T, a communications service provider. Performance data was not available for any of these properties.

▼ FIGURE 3.15 EXAMPLES OF OFFICE, STUDY AREA, 2023



▼ MAP 3.6 OFFICE PROPERTIES, STUDY AREA, 2023

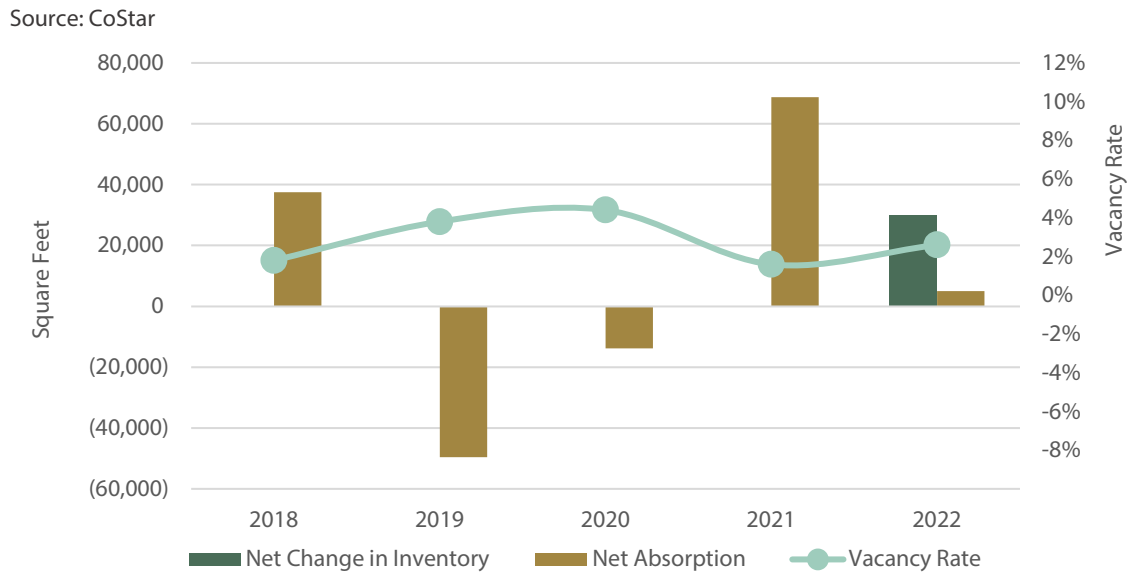


Source: CoStar

OFFICE PERFORMANCE TRENDS

Nearly 2.5 million SF of office space is located in the Market Area, making up 3.5% for the regional inventory. Last year saw first delivery of new space in five years. Staying below 5%, vacancy in the Market Area has been much tighter than the Tri-Metro Region. The low vacancy rate corresponds with the limited inventory. Office rents in the Market Area are lower than the region, which is boosted by Durham's life science and tech campuses. Annual rent growth averaged 5.7% in the Market Area since 2018. Average lease rates for office are unlikely to be able to support new construction.

▼ FIGURE 3.16 OFFICE PERFORMANCE TRENDS, MARKET AREA 2018-2022



HOSPITALITY PROFILE

Downtown Elon has one hotel, The Acorn Lodge, with 12 rooms. It was completed in 2001. The typical rate is \$175-\$225 per night.

- 12-month occupancy rate was 54.1%
- 12-month average daily rate was \$177.75

Just outside the Study Area, on the Elon University campus is The Inn at Elon. Developed in partnership with the University, The Inn at Elon hosts 80 rooms and was built in 2020. It is classified as a luxury property and includes 5,200 square feet of meeting space. The property has average occupancy but above average daily rates. The typical rate is \$225-\$275 per night.

▼ FIGURE 3.17 ACORN LODGE HOTEL, STUDY AREA



▼ MAP 3.7 HOTEL INVENTORY, STUDY AREA, 2023



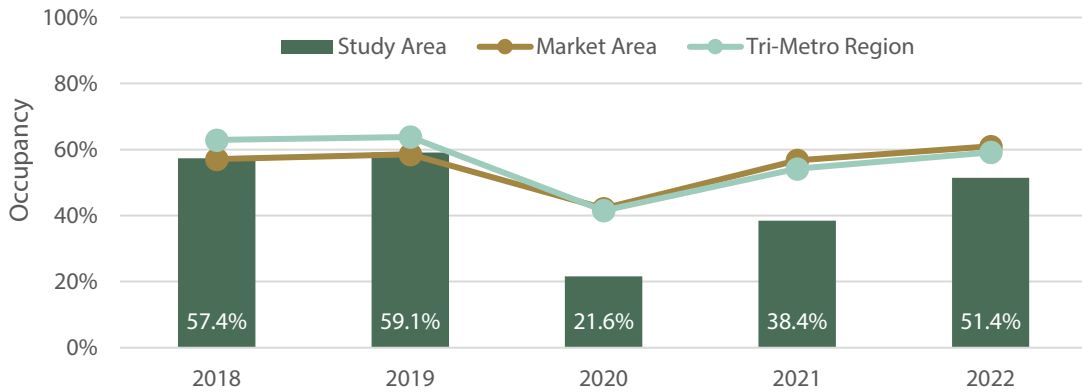
Source: CoStar

HOSPITALITY PERFORMANCE TRENDS

Performance trend data for the Study Area's one lodging property is compared with the Market Area and region. 1,320 rooms across 15 properties are in the Market Area, representing 5.1% of the regional inventory. Another 300 rooms are in the pipeline, contained within one independent hotel under construction and two proposed franchises, all in Burlington.

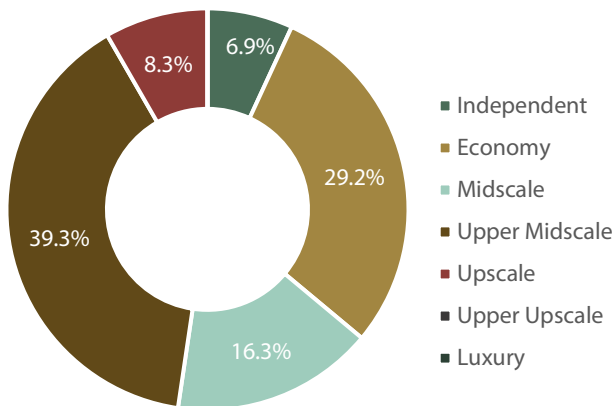
▼ FIGURE 3.18 COMPARISON OF OCCUPANCY TRENDS 2018-2022

Source: CoStar

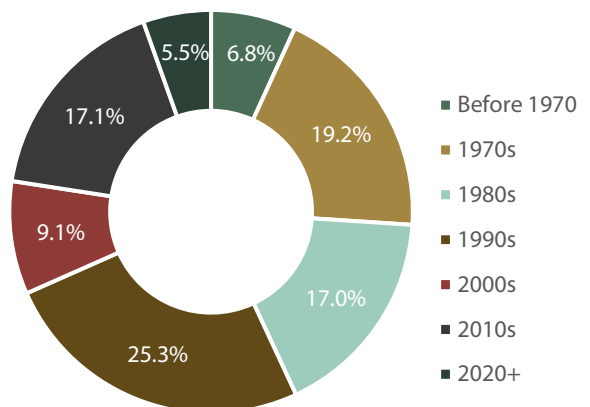


Occupancy and daily rates for all three areas were impacted by the COVID-19 pandemic, with the Study Area reporting the largest declines. This is likely due to the reliance on university-related visitors. The Market Area room inventory is older, with nearly 70% built before 2000. Almost 40% of rooms are classified as Upper Midscale, which is limited service.

▼ FIGURE 3.19 ROOM INVENTORY BY HOTEL CLASS, MARKET AREA, 2023



▼ FIGURE 3.20 ROOM INVENTORY BY DECADE COMPLETED, MARKET AREA 2023



DEMAND AND OPPORTUNITY

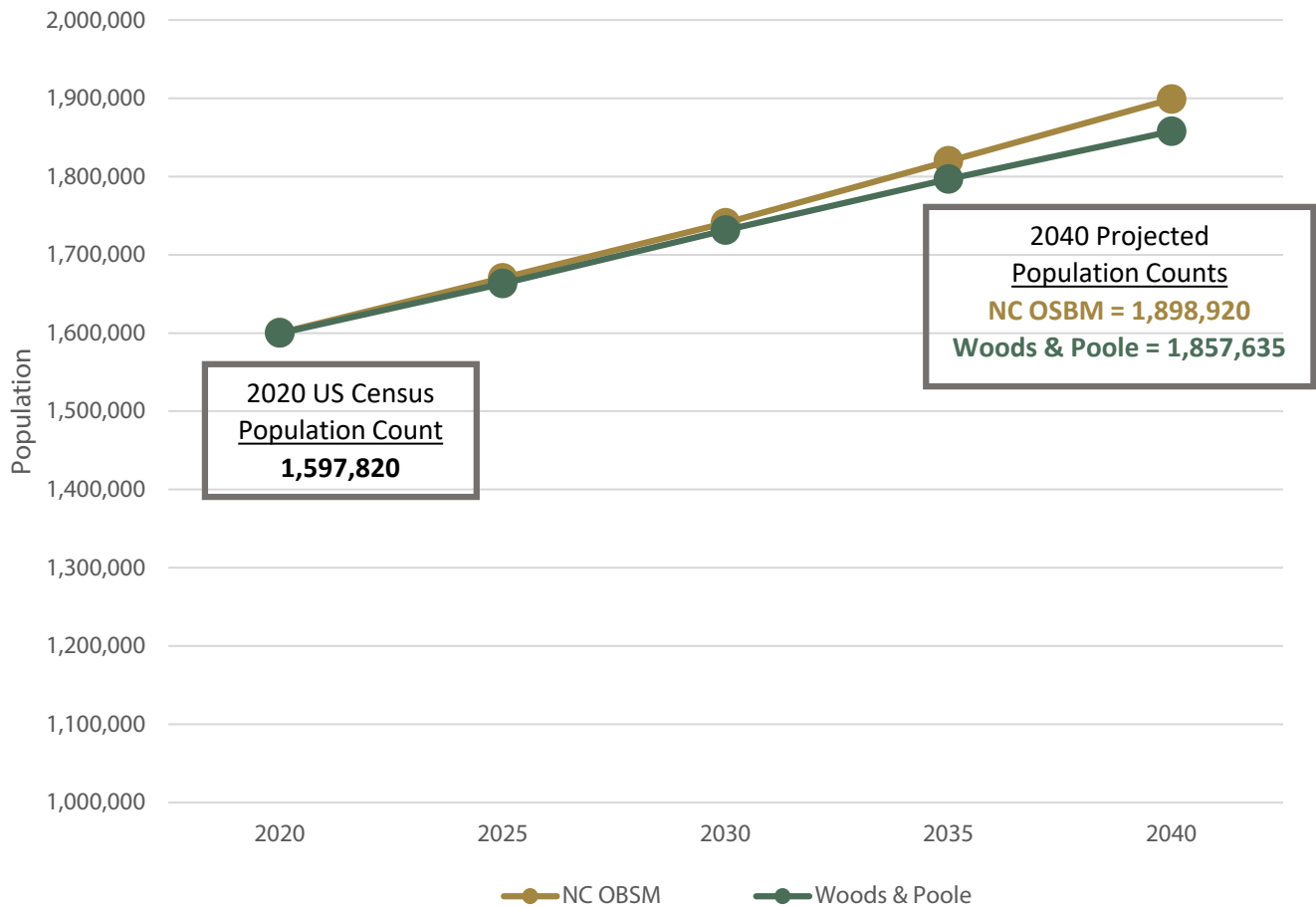
REGIONAL POPULATION FORECASTS

Population forecasts for the Tri-Metro region were obtained from the NC Office of State Budget and Management (NC OSBM) and Woods & Poole, an independent socioeconomic forecasting firm that provides economic and demographic projections.

The NC OSBM forecast results in a total 2040 population in the Tri-Metro region of nearly 1.90 million, while the Woods & Poole forecast projects 1.86 million total people. The average of both sources projects a total 2040 population in the region of over 1.8 million, representing a 17.4% increase over the 2020 US Census count. These regional forecasts provide the basis for projections more specific to the Market Area.

▼ FIGURE 3.21 POPULATION FORECAST- TRI METRO REGION, 2010-2040

Source: US Census; NC OBSM; Woods & Poole

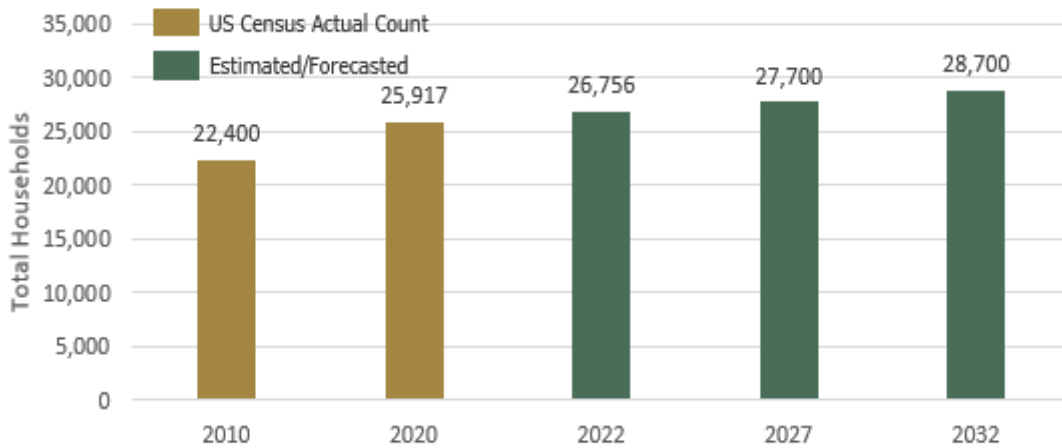


MARKET AREA POPULATION FORECASTS

The Market Area forecasts are based on a capture of the range of forecasts presented for the Tri-Metro Region, over the next ten years (2022-2032). Based on this approach, the total population in the Market Area is expected to reach approximately 74,500 people by 2032, representing the addition of more than 5,900 new residents. This growth equates to a growth rate of 8.6% through 2032. Maintaining a consistent household size of 2.37 people, the Market Area could increase by approximately 1,900 households during the same 10-year time frame.

▼ FIGURE 3.22 HOUSEHOLD FORECASTS, MARKET AREA, 2010-2020

Source: US Census; NC OBSM; Woods & Poole; ESRI BAO






RESIDENTIAL DEMAND

Residential demand in Downtown Elon is based on projected Market Area population and household growth. Based on forecasted household growth of 1,900 through 2032, the Market Area could support up to 2,050 new housing units.

Housing demand considers a continuation of the current housing vacancy rate, which is currently at approximately 7.8%. This analysis holds the current vacancy rate relatively consistent over the 10-year forecast horizon. A variety of housing products will be attractive in the Market Area, representing a continuation of the current inventory and the known development pipeline. Given the diverse resident profile and tapestry segments represented, both for-sale and rental tenures will be in demand in the Market Area in the future.



The estimated shares of housing units by type in the Market Area in 2032 considers the dynamics of the main household growth segments. Based on the assumed shares the forecasted Market Area and Downtown Elon forecasted housing units are as follows:

	Type	Forecasted Housing Units	Downtown Capture Rate	Forecasted Downtown Housing Units
	Single-Family Detached	1,000 units	<2%	5-15 units
	Townhouse/Attached	250 units	10-15%	25-35 units
	Multifamily	800 units	15-20%	120-160 units

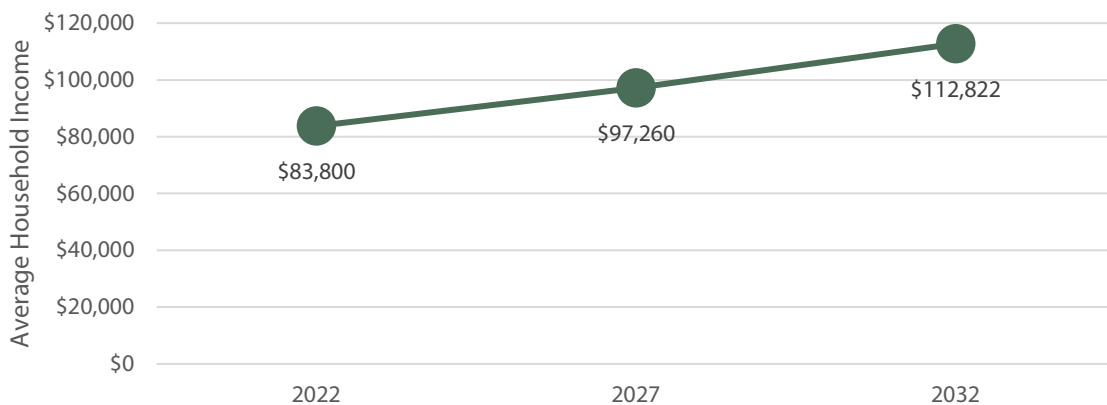
RETAIL DEMAND

Retail demand for the Market Area considers increases in population density and area income to estimate future spending potential through 2032. The methodology for determining future retail demand is based on a combination of population growth, income levels, and inflow/outflow purchases from the influx of employees and visitors that travel into the Market Area.

Based on defined retail categories that are most likely to be represented in the Market Area, the expenditure potential of local households could increase by nearly \$145 million between 2022 and 2032. Based on average sales per square foot figures, this analysis projects Market Area net square footage demand of approximately 450,000 through 2032.

▼ FIGURE 3.23 AVERAGE HOUSEHOLD INCOME FORECASTS, MARKET AREA, 2022-2032

Source: US Census; NC OBSM; Woods & Poole; ESRI BAO



▼ FIGURE 3.24: RETAIL DEMAND, MARKET AREA, 2022-2023

Source: Kimley-Horn; ESRI BAO

Business Category	Net New Spending Potential	Sales per Sq.Ft.	10-Year Retail Demand (Sq.Ft.)
Apparel and Services	\$13,791,673	\$280	49,256
Computer/TV/Video	\$1,212,244	\$400	3,031
Pets	\$5,010,071	\$245	20,449
Toys/Games/Crafts	\$953,883	\$150	6,359
Sports/Exercise	\$1,424,786	\$150	9,499
Reading	\$925,575	\$150	6,171
Food at Home	\$37,496,605	\$400	93,742
Food Away	\$34,642,683	\$350	98,979
Furniture and Furnishings	\$9,997,441	\$180	55,541
Pharmacy/Personal Care	\$9,225,703	\$300	30,752
Automotive	\$22,930,070	\$440	52,114
Home Improvement	\$6,296,416	\$260	24,217
Total	\$143,907,149	\$320	450,109

OFFICE DEMAND

The office demand forecast for the Market Area is based on employment growth projected for Alamance County through 2032. The employment forecast is used to project office demand by considering the increases in types of jobs that would require new space. The employment forecast demonstrated a potential increase of over 3,300 jobs in the County over 10 years.

The sectors that are expected to demonstrate the strongest increases in office-occupying jobs include: Healthcare, Real Estate, Professional Services, and Finance and Insurance. Given the continued uncertainties related to hybrid work arrangement and long-term office space needs for companies, this analysis uses a standard 225 square feet per employee and holds it constant over the forecast horizon.

This analysis assumes that the Market Area could generate demand for approximately 256,000 square feet of net new office space over the next 10 years.

▼ FIGURE 3.25: OFFICE DEMAND FORECAST, MARKET AREA 2022-2023

Source: Kimley-Horn; Woods & Poole; NC OMB

Measure	Net New Demand (SF)
Office-Occupying Jobs	1,035
Square Feet/Employee	225
10-Year Office Space Demand (Sq.Ft.)	232,916
Vacancy Rate	10.0%
Gross 10-Year Office Space Demand (Sq.Ft.)	256,207

▼ FIGURE 3.26: OFFICE- OCCUPYING HOB FORECAST, MARKET AREA 2022-2023

Source: Kimley-Horn; Woods & Poole; NC OMB

Total Industry	Office Share	Office		2022-2032 Δ	
		2022	2032	#	%
Forestry, Fishing, and Related Activities	5.0%	1	1	0	6.2%
Mining	5.0%	0	0	0	0.0%
Utilities	20.0%	7	6	-1	-9.8%
Construction	20.0%	229	264	34	14.9%
Manufacturing	5.0%	248	226	-21	-8.6%
Wholesale Trade	10.0%	64	74	10	16.2%
Retail Trade	10.0%	626	646	20	3.2%
Transportation and Warehousing	20.0%	108	119	11	10.4%
Information	25.0%	169	170	1	0.4%
Finance and Insurance	85.0%	1,096	1,192	96	8.8%
Real Estate and Rental and Leasing	70.0%	862	1,041	180	20.8%
Professional and Technical Services	80.0%	1,066	1,224	158	14.9%
Management of Companies and Enterprises	80.0%	23	29	6	24.6%
Administrative and Waste Services	50.0%	432	489	57	13.1%
Educational Services	15.0%	428	494	66	15.4%
Health Care and Social Assistance	25.0%	2,287	2,539	253	11.1%
Arts, Entertainment, and Recreation	10.0%	51	68	17	33.9%
Accommodation and Food Services	10.0%	429	461	32	7.5%
Other Services	10.0%	212	259	47	22.2%
Government	60.0%	748	816	68	9.1%
Total		9,084	10,119	1,035	11.4%

HOSPITALITY DEMAND

Hospitality demand is impacted by a number user types, including business travel, group reservations, and travel and tourism. For this analysis, increases in business travelers was the key metric used to determine demand, holding room reservations by the other key user segments constant. The other metrics are expected to increase at a comparable rate to business travel, supporting the demand forecasted through this analysis. The Trade Area forecasts consider current performance of hotels in the surrounding area, including the impact of the COVID-19 pandemic and the subsequent recovery.

Employment forecasts were leveraged to determine the potential increase in 12 key sectors that most commonly generate business travel. Then, based on the current number of hotel rooms per employee in these sectors, the same rate was carried forward into the future. The rate was unchanged because typical occupancy and room rates indicate that the market is healthy, and the industry is reacting by delivering new product to meet growing demand. Based on a 15% estimate for the number of rooms per hotel-generating job added, there is demand for approximately 290 net new hotel rooms in the Market Area through 2032.



PRODUCT

Housing:
Single-Family Detached

Housing:
Townhouse

Housing:
Multifamily

DEMAND TIME FRAME

Mid-term

Short to Mid- term

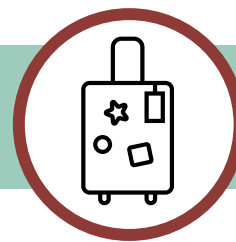
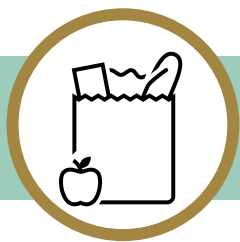
Short-term

MARKET CONSIDERATIONS

- There has been no new construction of single-family residential units in the Study Area in recent years
- Limited demand due to land constraints
- Opportunities could arise in the future for small-scale infill construction; these units could be attractive to households employed nearby or empty nesters
- These units would gravitate to areas of the Study Area that already have a residential lot pattern, likely further from the core

- Townhouses and Missing Middle would increase for-sale housing options for residents in Downtown Elon
- Like single-family, townhouses and other missing middle housing types would gravitate to portions of the Study Area further from the core

- Higher density housing best for infill and redevelopment
- Appropriate for sites near the downtown core
- Multifamily rental performing well with very low vacancy rates, largely driven by students attending Elon University
- Some market rate demand could be assumed for Elon staff and professors
- Rental rates will be challenged to incorporate structured parking due to price points + construction costs



PRODUCT

Retail:
 Neighborhood Serving
 Restaurants & Dining
 Niche downtown offerings

Office:
 University support
 Service office
 Live-work

Hotel:
 Limited Service
 Boutique facilities
 Bed & Breakfast

DEMAND TIME FRAME

Short to Mid-term

Mid- term/ Ongoing

Limited

MARKET CONSIDERATIONS

- Retail in a state of flux but authentic downtowns have been successful in attracting new retailers
- Important component of mixed-use projects and activates street-level
- Downtown Elon serves local and regional visitors, as well as students, staff, and guests at the University
- Drives demand for smaller spaces, food and beverage, and convenience uses

- Office market is still in a state of flux following the pandemic as companies consider hybrid working arrangements
- Primary demand driver for office space in Downtown will likely be the University in the short- and long-term; difficult to estimate
- Demand for new office space may increase as the downtown grows
- Focus on small spaces that serve entrepreneurs
- Some service office tenants (lawyers, accountants) could be attracted to Downtown if the space was available

- One property in the Study Area contains ~12 rooms
- Inn at Elon serves needs generated by the University; likely to continue to accommodate most demand in the short- and mid-term
- Longer-term potential would gravitate to areas with best access and visibility
- Smaller, boutique offerings could be accommodated in mixed-use buildings, including Air BNB properties

A stylized tree logo with a gold trunk and branches, green leaves, and a gold acorn at the top. The trunk is integrated into the letter 'E' of the word 'CEYLON'.

DOWNTOWN
CEYLON
MASTER PLAN

4

MASTER PLAN

MASTER PLAN

OVERVIEW

The Master Plan establishes a road map for the growth and development of Downtown Elon over the next five to ten years. The concepts included within this section are intended to serve as a resource for the Town Council and Town Staff to use when making decisions about priorities for the downtown and when approached by private developers. The community can also utilize this plan to advocate for projects and policies that move downtown forward.

The recommendations in this plan include a redesign for the Williamson Avenue and Lebanon Avenue streetscapes, a plan for a new Town Hall, and two new public squares for dining and community events. If implemented, these projects can help improve the downtown experience for residents and visitors alike.

This section of the plan is followed by an implementation section with strategies, policies, and timelines to help make these concepts a reality.

REDESIGNED STREETSCAPE CONCEPTS

North Williamson Avenue is a main thoroughfare in Downtown Elon and serves as a link between the Town and the University. One of the primary recommendations for the Master Plan is to redesign the streetscape along this roadway and a small segment of South Williamson Avenue adjacent to Town Hall. The following considerations influenced the design decisions:

DESIGN STREETS FOR PEDESTRIANS

- Limit the speed of cars by reducing the width of travel lanes
- Provide shade and rain protection with awnings and trees
- Use bollards to separate travel lanes from seating areas
- Use pedestrian bump outs at intersections to reduce the distance between crossing and the potential for conflicts
- Follow Universal Design techniques to make the streets welcoming for everyone

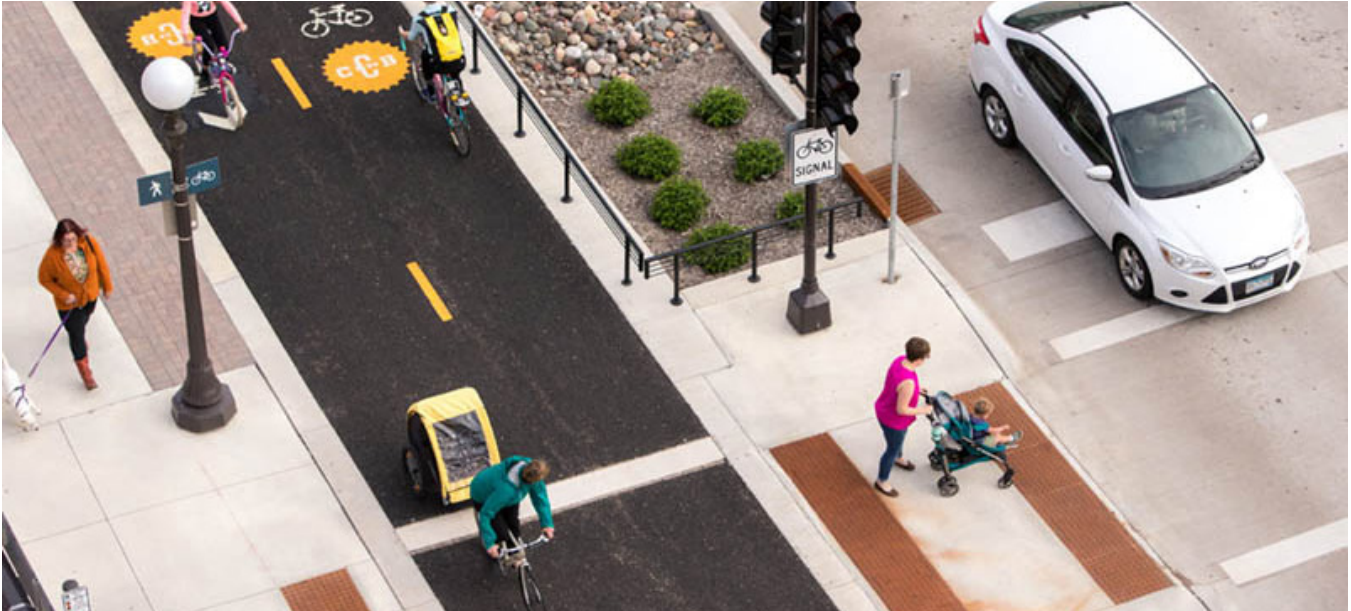
UNIVERSALLY DESIGNED STREETS HAVE THE FOLLOWING:

- **Wide sidewalks and pathways**
- **Areas for socializing**
- **Clearly defined spaces**
- **Attenuated acoustic environments**
- **Places of enclosure**
- **Multi-modal streets**
- **High contrast paving**
- **Pedestrian Safety Islands**
- **Flexible Seating**
- **Frequent Seating with Arms**
- **Well-lit and consistent lighting**
- **Green Infrastructure**

DESIGN STREETS FOR ACTIVITY

- Sidewalks designed to support what is behind the glass in restaurants and shops
- Adding cafe tables can add significant revenue to existing restaurants
- 14' is the minimum width for a two sided sidewalk cafe
- Large street trees slow traffic, shade the cafes, and have been shown to add to retail sales
- Lost parking spaces can be recovered on Lebanon Avenue on the University side

▼ FIGURE 4.1: EXAMPLE SAFE STREET DESIGN- JACKSON-STREET MINNESOTA REDEVELOPMENT



NORTH WILLIAMSON AVENUE DESIGN CONCEPTS

Leading into the first Downtown Workshop, three redevelopment concepts for the street were introduced. Each of these designs were based on the existing right of way on North Williamson Avenue of 60' with two lanes of traffic, on-street parking on each side, and 8' sidewalks on both sides of the street. At the workshop, participants were given the opportunity to explore the benefits and drawbacks of each of these concepts in small groups. Each group reported on their findings at the conclusion of the workshop, developing consensus on the preferred option for North Williamson Avenue. The three concepts included:

Concept 1: North Williamson Tightened Up

- 67% of Right of Way is for cars and 33% for sidewalks
- Travel lanes reduced to 12' and parking spaces reduced to 8' wide
- Keeps all on-street parking
- Includes small trees but limits the planting area
- Might be able to fit a two-top cafe table along west side storefronts

Concept 2: North Williamson Bike/Pedestrian Plan

- 40% of Right of Way is for cars and 60% for bikes, pedestrians, and cafes
- Large trees on both sides of the street in structural soil planting areas
- Parking lanes removed on both sides
- 20' sidewalk for cafe seating on the west side
- 8' two-way separated bike lane on the University side
- Bollards separate traffic from sidewalks

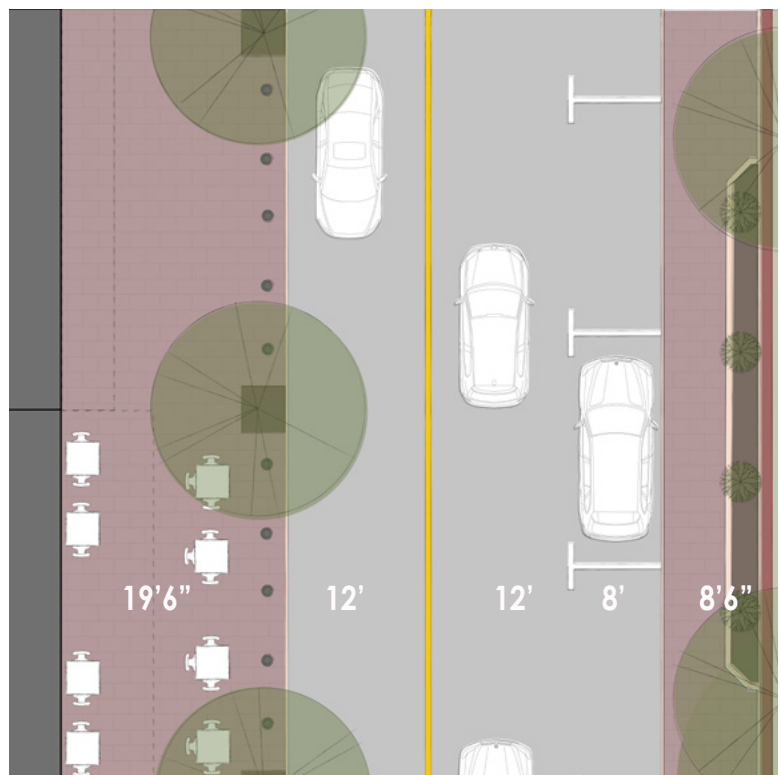
Concept 3: North Williamson Park One Side

- 53% of right of way given to cars and 47% for pedestrians and cafe
- Large trees on one side of the street in a structural soil trench
- Parking lanes removed on one side, lose 8 spaces
- 19.5' of sidewalk for cafe seating on west side
- Bollards to separate sidewalk from traffic where there are no parking lanes
- No changes made to the University side of the street which is a cost saving

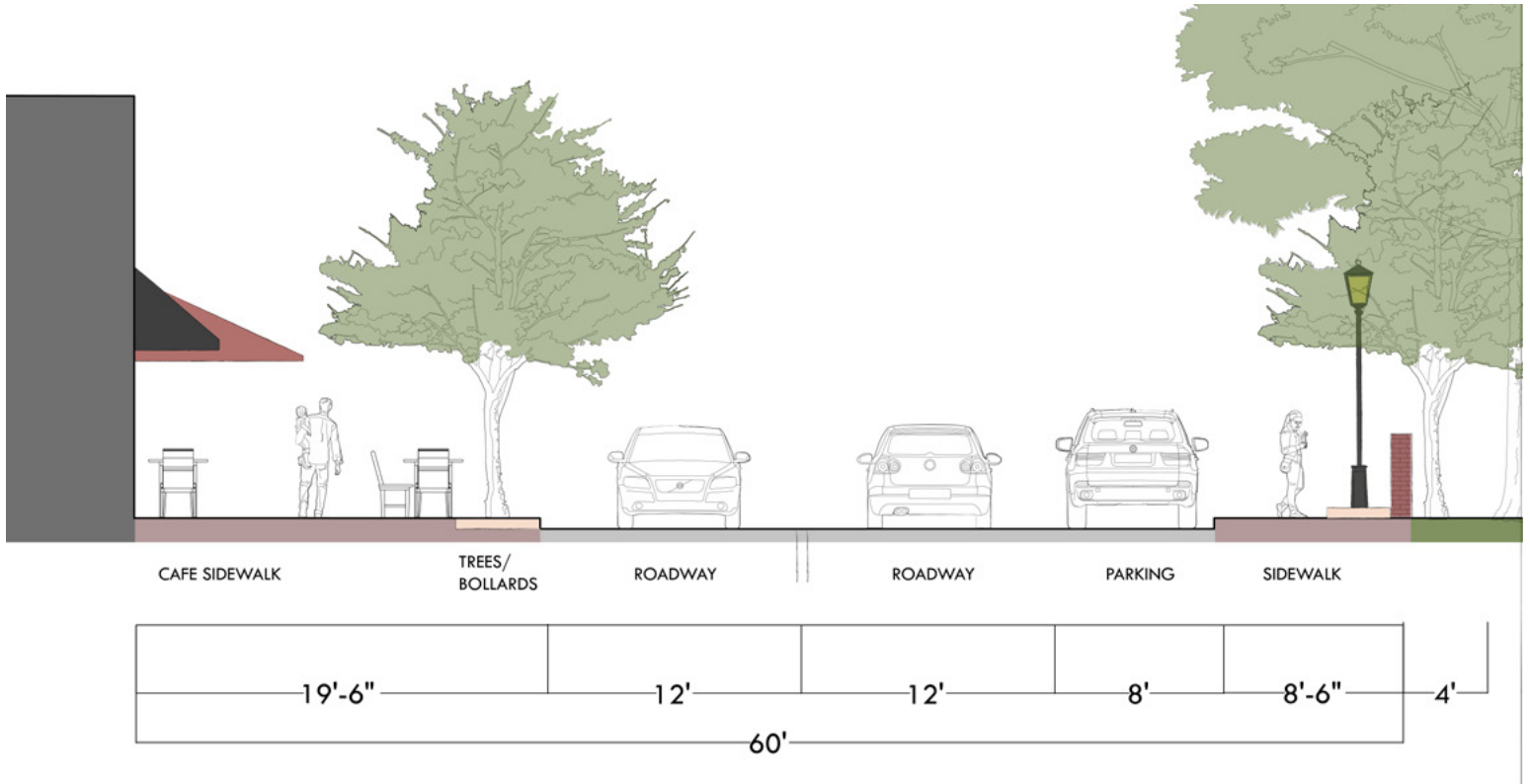
N. WILLIAMSON AVE PARK ONE SIDE CONCEPT

At the Downtown Workshops, the meeting participants developed a consensus around the third concept for the redesign of Williamson Ave. The decision was guided by wanting to retain some of the street parking while also working to activate the sidewalk along the west side of the street. The 19.5' sidewalk allows for the flexibility to incorporate cafe seating outside of restaurants while also providing space for social interaction and pop-ups. Reducing the travel lanes to 12' still provides ample space for the movement of vehicles and is greater than the minimum allowable width of 10'. Bollards along the west sidewalk provide improved pedestrian safety where on-street parking previously served as a barrier between the sidewalk and the travel lanes.

▼ FIGURE 4.2: NORTH WILLIAMSON AVENUE CONCEPTUAL PLAN



▼ FIGURE 4.3: CROSS SECTION OF CONCEPTUAL NORTH WILLIAMSON AVENUE



▼ FIGURE 4.4: CONCEPTUAL ILLUSTRATION OF THE NORTH WILLIAMSON AVENUE STREETScape VISION



NORTH WILLIAMSON-STREETScape ALTERNATIVE

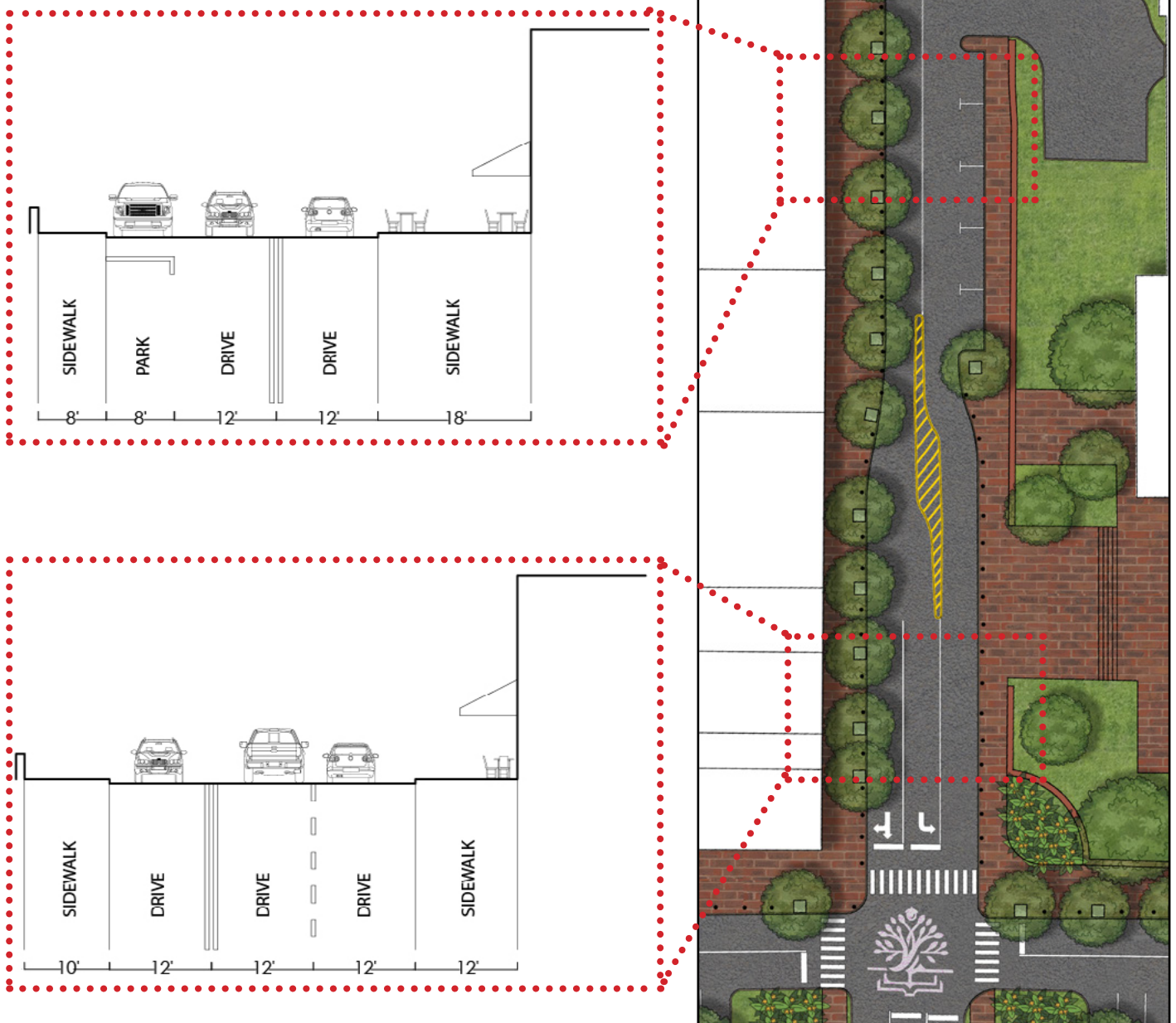
Preferred Option:

As mentioned previously, the preferred streetscape option for North Williamson Avenue that arose during the Downtown Workshops involved shrinking the lane widths and removing parking on the west side of the street from W. Lebanon Avenue to W. College Avenue in order to expand the sidewalk and create space for a lively cafe dining and retail street.

Alternative 1:

This option explores adding a turn lane at N. Williamson Ave and W. Lebanon Ave. However, the turn lane does not allow for the large cafe sidewalk to be continued along the first half of the N. Williamson Ave block. This is not the preferred scenario because the block would lose 150 feet of cafe space, almost half of its length, and four parking spaces and a loading area. If left turns are determined to hold up traffic at this intersection, another option is to not allow left turns.

▼ FIGURE 4.5: ALTERNATIVE ONE



WEST LEBANON AVENUE DESIGN CONCEPTS

The West Lebanon Avenue Streetscape was also a priority in the Master Plan as a continuation of the N. Williamson Ave design. Similar considerations to N. Williamson Ave were taken into account when looking at options for W. Lebanon Ave. At the first workshop, meeting attendees were presented with one conceptual option for W. Lebanon and were again asked to weigh the pros and cons of this option as well as bring ideas of their own to the table. The existing streetscape for W. Lebanon Ave consists of 89% right of way area dedicated to cars with only 11% designated for sidewalks. The 30' travel lane provides space for two-way traffic. The street has parallel parking on the north side and front-in parking spaces along the railroad. The Town already has plans in place to increase parking on the railroad side which were noted in the parking section and incorporated into the concept designs.

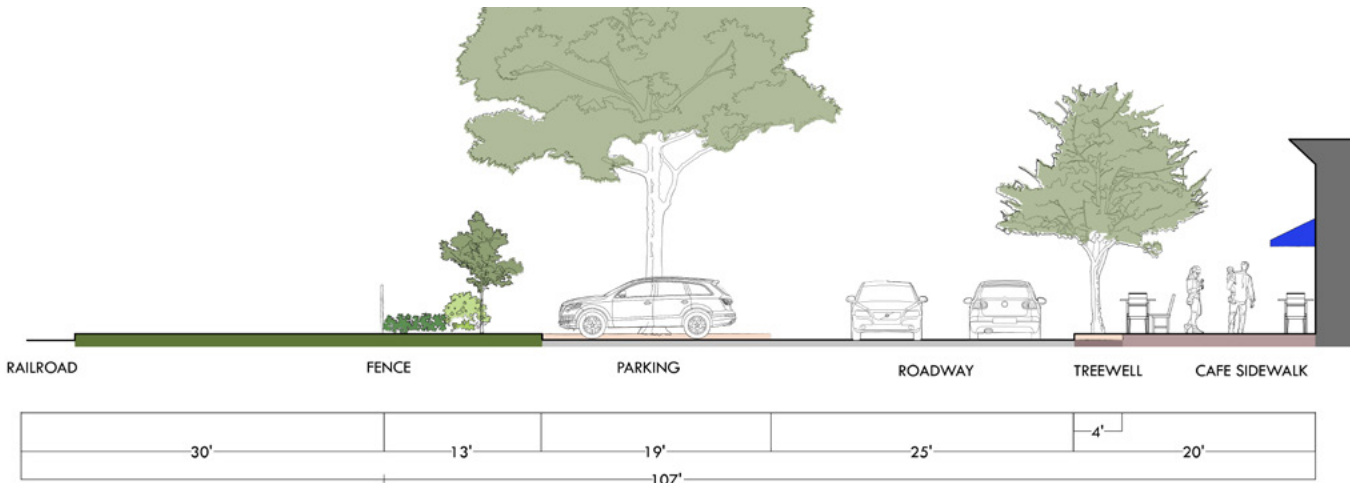
▼ FIGURE 4.6: EXISTING WEST LEBANON STREETSCAPE



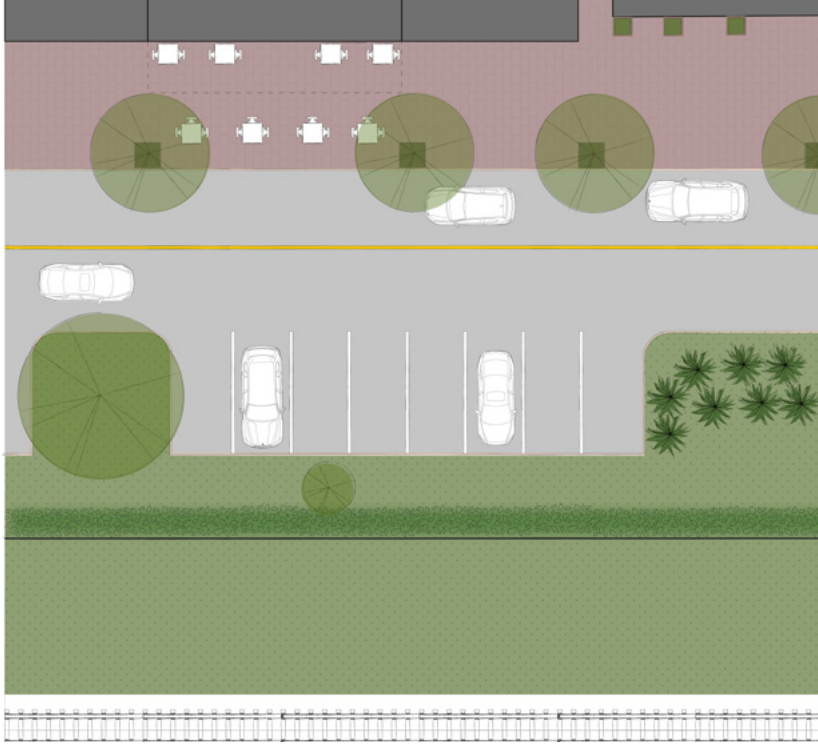
WEST LEBANON CAFE STREETScape OPTION

The first Downtown Workshop established consensus around a cafe style streetscape option for W. Lebanon to align with designs for N. Williamson Ave. The design reduces the travel lanes to 12' and includes a new road line to distinguish the two lanes and prevent confusion. Widening the sidewalk on the building side of the street to 18' maximizes the opportunity for cafe seating. The wider sidewalk also allows for large street trees and increased shading for pedestrians. The primary improvement in this option is widening the sidewalk, which keeps the construction costs much lower for this option.

▼ FIGURE 4.7: CROSS SECTION AND PLAN VIEW OF CONCEPTUAL WEST LEBANON AVENUE IMPROVEMENTS



▼ FIGURE 4.8: PLAN VIEW OF CONCEPTUAL W. LEBANON AVENUE



▼ FIGURE 4.9: EXAMPLE LANDSCAPING



RAILROAD CROSSING

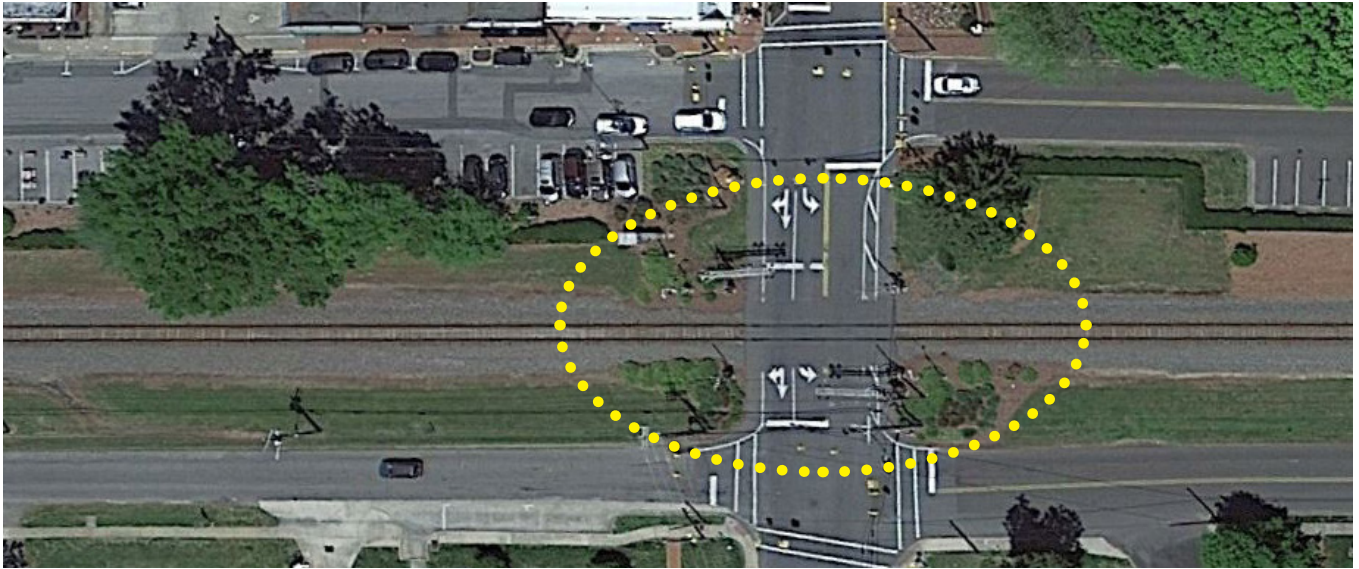
The primary barrier within Downtown Elon is the connection between North and South Williamson Avenue. While the majority of the retail and University area is on North Williamson, the post office and Town Hall are located on South Williamson. The railroad separates the two halves of Downtown. The implementation of a revised design can better connect these two areas both visually and physically.

This concept for a redesigned railroad crossing envisions sidewalks connecting both sides of the railroad, a high contrast street paving at the crossing to improve visibility, narrowed travel lanes to reduce vehicular speeds on the crossing, and landscaping buffers to improve noise, safety, and aesthetic appearance of the area. The concept also includes designs within the intersections on both sides of the railroad to serve as a visual gateway to Downtown Elon for people passing through by rail (Figure 4.9).

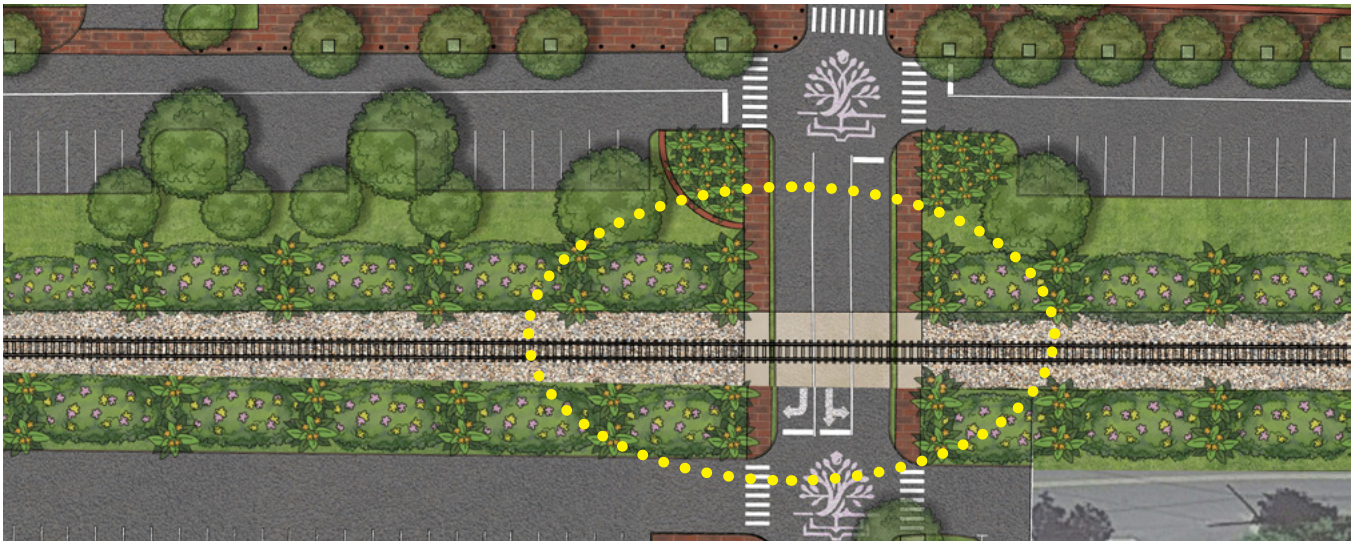
▼ FIGURE 4.10: EXAMPLE RAILROAD CROSSING, FLORIDA



▼ FIGURE 4.11: EXISTING RAILROAD CROSSING AT N. WILLIAMSON AVENUE



▼ FIGURE 4.12: ILLUSTRATED CONCEPT FOR IMPROVED RAILROAD CROSSING



▼ FIGURE 4.13: VIEW OF RAILROAD CROSSING LOOKING UP N. WILLIAMSON



OPPORTUNITY SITES

The Downtown Assessment identified several parcels within the Downtown Boundary that have the potential for redevelopment. These sites were selected for their market potential and site characteristics that enable these areas to serve as catalysts for accomplishing the goals for the future of Downtown Elon. A real estate demand summary presented below for the area illustrates the net demand for different land uses over the next 10 years.

Primary identification of the sites was focused on properties that currently were under public ownership and therefore were more readily available for public investment. The Map 4.1 highlights the parcels within the Downtown area that are either owned by the Town of Elon or by the University. Regardless of property ownership, it is anticipated that public-private partnerships will need to be established to fund the redevelopment of these areas.

Additional considerations such as location and property value also factored into the potential opportunity that each parcel presented. Map 4.2 highlights the parcels that were identified as having the highest potential for redevelopment.

10-Year Net Demand (2022-2032)



HOUSING



RETAIL



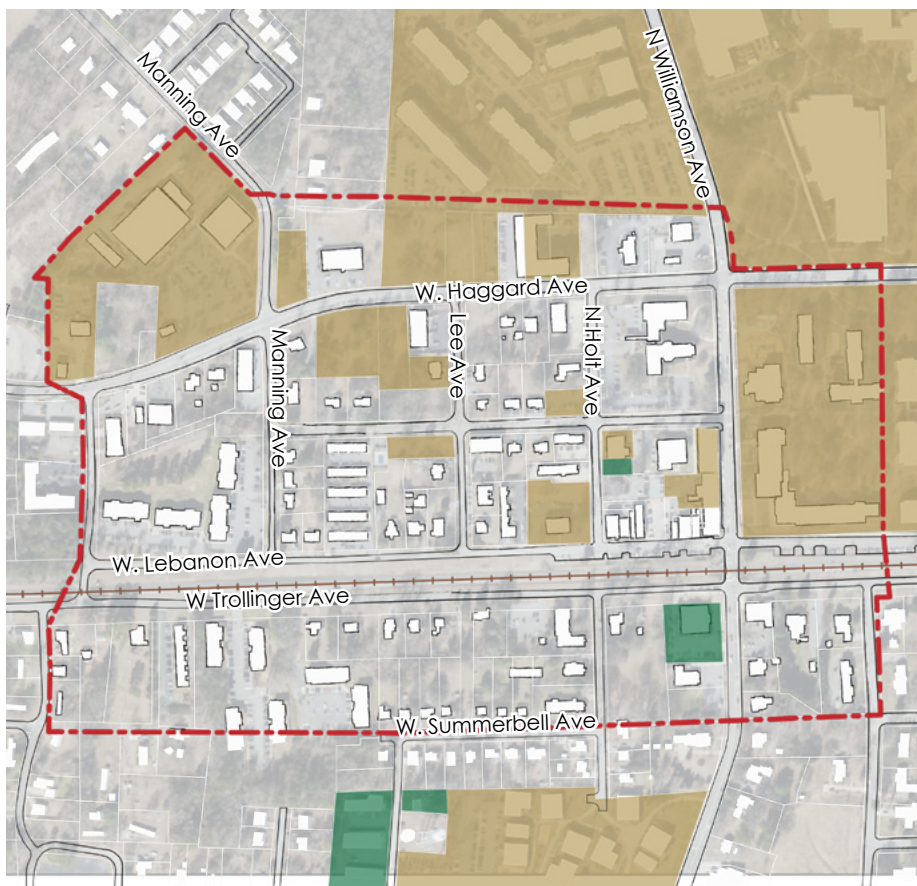
OFFICE



HOTEL

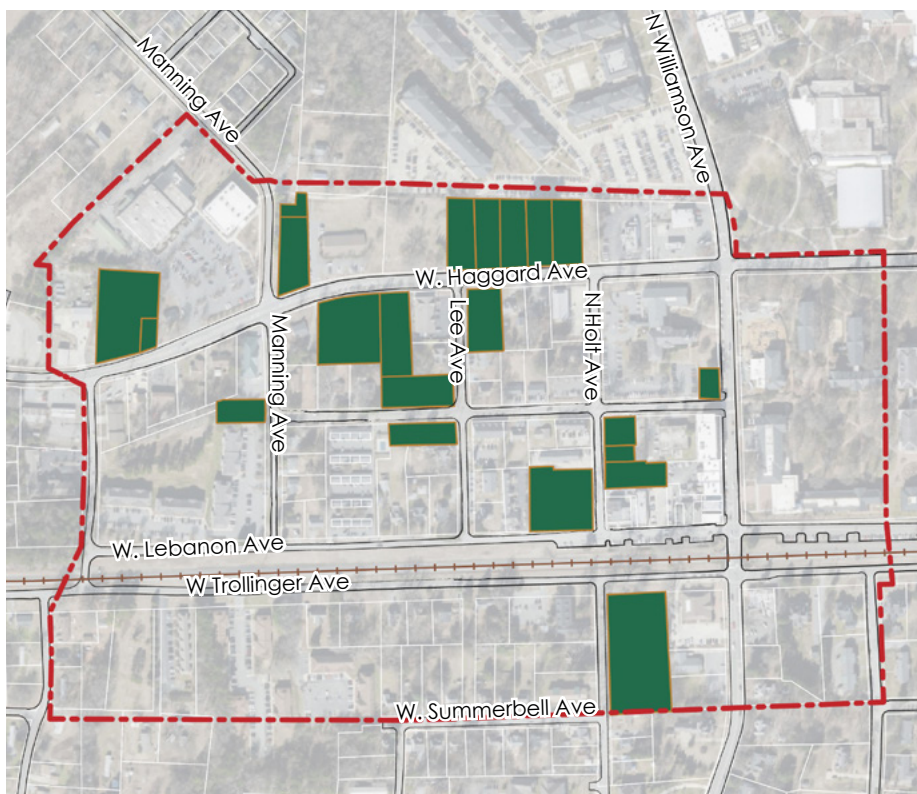
	HOUSING	RETAIL	OFFICE	HOTEL
Market Area Demand Forecast	2,050 Units	450,000 Square Feet	256,000 Square Feet	290 Rooms
Downtown Capture Rate	7.5% - 10%	10% - 15%	10% - 15%	5% - 10%
Downtown Demand Forecast	150 - 210 Units	45,000 - 68,000 Square Feet	25,000 - 38,000 Square Feet	15-30 Rooms

MAP 4.1: PROPERTY OWNERSHIP



- Government Owned
- University Owned
- Streets
- Building Footprint
- Downtown Core

MAP 4.2: OPPORTUNITY ANALYSIS



- Parcels identified as high opportunity for re-development

FOCUS AREAS

The focus of redevelopment in Downtown Elon was centered around North and South Williamson Avenue and North Holt Avenue. The Town and University own several parcels in these areas and there are also several privately owned vacant parcels within these areas. The other area of focus was the development of a new Town Hall building on adjacent private property and the existing site of the current Town Hall.

The focus areas for the Master Plan are shown in the figure to the right. The redevelopment opportunities include the following:

1. **Housing and Retail Development- North Holt Avenue**
2. **Town Gown Plazas - North Williamson Avenue**
3. **Town Hall with Mixed Use addition- South Williamson Avenue**

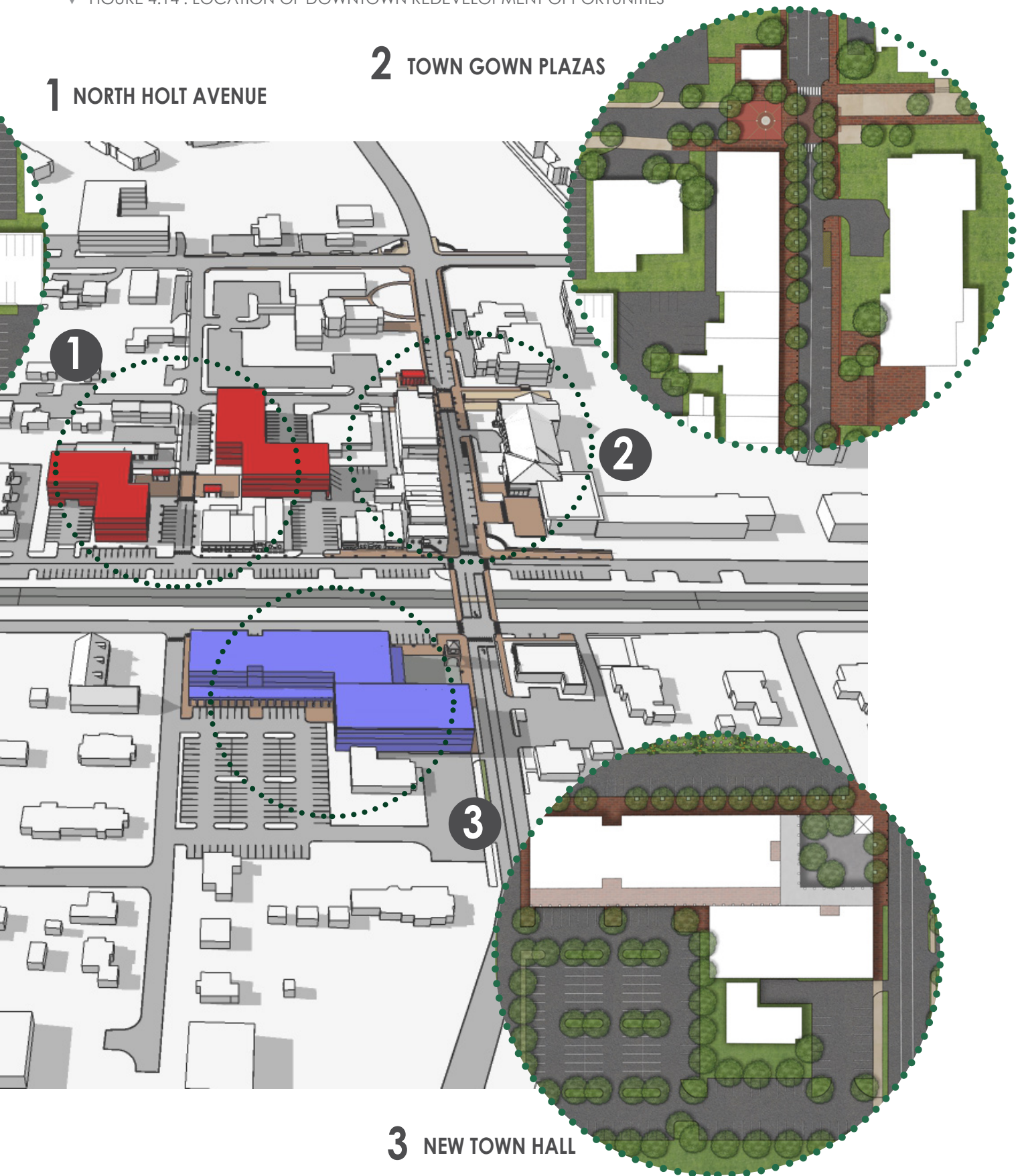
DOWNTOWN URBAN DESIGN GOALS

Each of the developments were designed with the following urban design goals in mind.

- Make pedestrian friendly improvements throughout, but especially Williamson Avenue
- Increase parking in Downtown Core
- Add more housing where possible
- Add more retail in Downtown Core
- Identify potential library or museum sites
- Add more outdoor public spaces for gathering
- Improve linkages between the University and Downtown



▼ FIGURE 4.14 : LOCATION OF DOWNTOWN REDEVELOPMENT OPPORTUNITIES



▼ FIGURE 4.15: OPPORTUNITY SITE 1 - NORTH HOLT AVENUE



NORTH HOLT AVENUE REDEVELOPMENT OPPORTUNITY

North Holt Avenue between W. College Avenue and W. Lebanon Avenue was determined to be an ideal candidate for redevelopment because it contains several University and Town owned parcels that can be leveraged, while allowing for an expansion of Downtown beyond N. Williamson and W. Lebanon Avenues.

The redevelopment of the area is guided by the construction of two new four-story buildings which frame a new public square and retail street along N. Holt Avenue. The square and street space are created by leveraging existing Town and University owned land. The current designs for additional parking along West Lebanon are supported with additional new head-in parking spaces along N. Holt Avenue. Additional off-street parking is located behind the buildings to encourage an active street front. Parking is also envisioned underneath the first floor of the new buildings to maximize retail square footage.

The two new buildings have several options for ownership and use. Currently Site 1 has mixed ownership between the Town, University, and Private Landowners. Among all of the options for this building, the top 3 stories are designed to serve as suite style apartments primarily for student use. With an average size of 1,500 sq ft per unit, this building could accommodate 25 units and approximately 100 bedrooms. Because the units are intended for students of the University, the minimum parking requirements should be waived for this development. Site 1 would provide 15 off-street and 14 on-street parking spaces for residents. Three options for the ground floor use of the building are listed below:

Site 1- Option 1

- 8,000 sq ft of retail on the street
- 5,000 sq ft of student space along College Avenue

Site 1- Option 2

- 13,000 sq ft of retail

Site 1- Option 3

- 13,000 sq ft of retail on the first floor
- 10,000 sq ft basement restaurant/ bar/ student space

▼ FIGURE 4.16: 16 UNIT APARTMENT WITH NO PARKING AT NCSU



▼ FIGURE 4.17: 16 UNIT APARTMENT WITH NO PARKING AT NCSU



▼ FIGURE 4.18: EXAMPLE STUDENT SUITE 4BED/4 BATH = 1,500 SQ FT



Site 2 is owned by the University; however, it could still have retail and/or public uses.

Site 2- Option 1

- 25,000 sq ft Public Library on the first two floors
- 30,000 sq ft University Offices on the top two floors
- 32 off-street parking spaces and 22 on-street parking spaces

▼ FIGURE 4.19 : PROPOSED HOUSING OVER THE NEW LIBRARY AND CHILDREN'S MUSEUM IN MYRTLE BEACH



Site 2- Option 2

- 10,000 sq ft of Retail on the ground floor
- 30 suite style apartments on the top 3 floors (+/- 1,500 sq ft per unit)
- 32 off-street parking spaces and 22 on-street parking spaces

▼ FIGURE 4.20: EXAMPLE OF SMALL PUBLIC SQUARES



ADDITIONAL SITE 3 OPPORTUNITY

If demand for space is high, the Town can also pursue additional development along North Holt Avenue. This alternative design includes an additional four story mixed use building on the corner of W. College Avenue and N. Holt Avenue. The new building is designed to hold 16,500 sq ft of ground floor retail and the top three floors occupied by 4 bedroom apartments. At around 1,500 sq ft each, the building should support 42 units. This design also adds 58 parking spaces: 36 in a parking lot and 15 on N. Holt Avenue. The layout of the new building provides enclosure around the new plaza to foster a more urban feel and wide sidewalks along the entire stretch of North Holt Avenue.

▼ FIGURE 4.21: OPPORTUNITY SITE 1- NORTH HOLT AVENUE ALTERNATIVE



▼ FIGURE 4.22: ILLUSTRATION OF NORTH HOLT AVENUE REDEVELOPMENT



▼ FIGURE 4.23: VIEW FACING DOWN NORTH HOLT AVENUE TOWARDS WEST LEBANON AVENUE



▼ FIGURE 4.24: OPPORTUNITY SITE 2 - TOWN GOWN PLAZAS



TOWN-GOWN PLAZA REDEVELOPMENT OPPORTUNITY

The proposed Town Gown Redevelopment Plaza builds off of the Town's existing plans for the new plaza at West College Avenue as well as the streetscape design for North Williamson Avenue but further develops the connections between the Downtown and the University through mirrored plazas. The design for this space would keep the Town's College Avenue plaza as it is designed and echo the public space across North Williamson on the University side. Both plazas would allow for a variety of uses with the main focus on outdoor dining and seating. On the University side, the brick gate would remain in place and serve as a pathway through the plaza, but the rest of the brick wall across from West College Avenue would be removed to allow for pedestrians to flow around the space. The street between the two plazas will have a decorative brick pattern and bulb outs on the curb to signal that pedestrians are the priority within this space. Adjacent to the Town's plaza near the Church, a park pavilion has been added to serve as a place for the Farmer's Market, a stage for music, gathering/sitting space, or workout space. Along the bulb outs on the north side of the street, electrical hook ups could provide for food trucks during events. Space within both plazas is also available for public art.

▼ FIGURE 4.25: VIEW FACING PLAZAS FROM UNIVERSITY TOWARD WEST COLLEGE AVENUE.



▼ FIGURE 4.26: EXAMPLES OF PARK PAVILION DESIGNS



▼ FIGURE 4.28: OPPORTUNITY SITE 3- TOWN HALL



TOWN HALL REDEVELOPMENT OPPORTUNITY

For the past couple of years, the Town of Elon has recognized the need to replace the existing Town Hall building due to its age and the need to support a higher number of employees. In the short run, this need for more space will be lessened by the police moving to their new office location on W. Haggard Avenue. The current Town Hall location near the main downtown retail street and across from the Post Office is ideal for a civic center. The lot adjacent to the Town Hall could have a high development potential, the concept included an additional structure next to the Town Hall. By inviting other uses beyond government services onto the site, the space can serve as an extension of the Downtown and provide new tax revenue to support the cost of the new Town Hall. A new public plaza on the corner of W. Trollinger Avenue and S. Williamson Avenue can serve as an additional space for events, dining, outdoor classroom space, and community activities.

As with the North Holt Avenue concept, two options for this site were presented during the Downtown Workshop. Both options include 12,750 sq ft for the new Town Hall building , 120 off-street and 32 on-street parking spaces, a new public plaza with a clock tower landmark, and new non-student residential apartments

Site 4- Option 1

- 18,250 sq ft Library or Conference center
- 60 non-student apartments (750 sq ft) on the top 3 floors

Several examples of mixed use libraries can be found around the country and can provide inspiration for how this space could serve the community. Some examples are provided below:

The Battery Park City Library which is shown in Figure 4.29 is a mixed use development in New York City. This space is located in a changing neighborhood with an influx of young parents who wanted space for their children. Although it is a small branch of the library, the natural lighting and flex spaces provide a versatile family environment.

The Good Hope Library in Milwaukee shown in figure 4.30 is another mixed use library building. The Good Hope Library hosts 65 mixed income apartment units above the library space. Other spaces in the building include a maker space and social influencer area (Figure 4.31), teen space, computer space, community rooms, and children's spaces.

Site 4- Option 2

- 18,250 sq ft of retail space or conference space
- 115 non student apartments (750 sq ft) on the top 3 floors of both the retail building and Town Hall

The second option for the site replaces the library with additional retail and restaurant space to further activate the public plaza.

▼ FIGURE 4.29: BATTERY PARK CITY LIBRARY



▼ FIGURE 4.30: MILWAUKEE GOOD HOPE LIBRARY



▼ FIGURE 4.31: GOOD HOPE LIBRARY MAKER SPACE



College Park Maryland recently completed a similar design with City Hall and University uses combined together in one building with the goal of combining investment to make the community attractive to prospective students, faculty, and companies. The Town of Morganton, NC combined their new City Hall with Housing in a converted textile mill.

▼ FIGURE 4.32: COLLEGE PARK MARYLAND



▼ FIGURE 4.33: MORGANTON NC CITY HALL



▼ FIGURE 4.34: VIEW OF NEW TOWN HALL AND PLAZA FROM N. WILLIAMSON AVE



▼ FIGURE 4.35: ILLUSTRATED MASTER PLAN



5

**IMPLEMENTATION
PLAN**

IMPLEMENTATION PLAN

OVERVIEW

While there were several concepts presented during the Downtown Workshops, four key recommendations were identified to implement the concepts of the Plan. The following pages describe these recommendations and the action steps that will help ensure transformative opportunities for Downtown Elon are implemented. These recommendations should serve as a starting point for the Town to spark further redevelopment.

KEY RECOMMENDATIONS

- Complete Williamson and Lebanon Avenue Streetscapes
- Undertake one Public- Private Partnership redevelopment project
- Lessen student parking and traffic demand in Downtown Elon
- Partner with the University to create a downtown that benefits everyone

▼ FIGURE 5.1: OVERVIEW OF MASTER PLAN REDEVELOPMENT OPTIONS



COMPLETE WILLIAMSON AND LEBANON STREETSAPES

North Williamson and West Lebanon Avenues are the primary restaurant and entertainment streets in Downtown Elon. Redesigning the streetscapes along these roads can help encourage an even more vibrant, attractive and safe downtown environment. A redeveloped streetscape will support continued restaurant, retail, and entertainment uses that compliment the existing character and fabric of downtown. Investment in these streetscapes will help attract outside investment and build value that will be essential to growing the Downtown area.

COOPERATION AND COORDINATION

- Investigate the costs and benefits of removing the right-of-way from the NCDOT roadway system on the stretch of Williamson Avenue from Haggard Street to Town Hall. Local control of the right-of-way allows for increased flexibility in roadway and signage design; however, it also comes with increased construction and maintenance costs.
- Investigate federal and state funding options to assist with construction and maintenance costs. Currently, several federal funding opportunities are available for rail, sustainability, and pedestrian improvements.
- Meet with the North Carolina Railroad (NCRR) to determine any requirements or limitations that they may have on the design of a new railroad crossing and additional parking.
- Begin discussions with the University of Elon and existing business owners on the expanded Town-Gown plaza concepts and activation.
- Begin discussions with the Elon Community Church on an easement for the potential outdoor pavilion, market, and stage building to support activities at the new plaza.

IMPROVED PARKING

- Meet with stakeholders to confirm new on-street parking and loading systems within the streetscape design.
- Develop revenue estimates of various parking fee options.
- Design and install a parking wayfinding system that denotes public vs. private hours as well as payment systems in place.
- Meet with the University and NCRR to confirm the potential addition of new parking spaces along East Lebanon Avenue.

REGULATIONS AND DESIGN

- Reform the outdoor dining permitting system to align with the streetscape design. Improve the process to obtain a permit to make it easier for business owners.
- Work with an engineering firm to implement the streetscape design vision, replace necessary infrastructure, and provide paid parking system estimates along with other technical details.

UNDERTAKE A PUBLIC PRIVATE PARTNERSHIP REDEVELOPMENT PROJECT

A public private partnership (PPP) enables expanded public services and projects to be implemented at a faster pace and lower cost to the Town. The first redevelopment project that the Town undertakes will serve as a spark to incentivize further development. By partnering with a private developer, the Town could guide the type of redevelopment project while collaborating on finances and building uses. Within the Master Plan section, several uses were proposed for each opportunity site and redevelopment project. These uses can be finalized through coordination with a developer to ensure that the project meets the Town's vision and is of benefit to the potential partnership.

COLLABORATION

- Meet with the University and private owners to assemble properties along North Holt Avenue for redevelopment
- Meet with private owners adjacent to Town Hall to assemble a larger site and determine easements required for redevelopment.

ANALYSIS

- Meet with regional developers to evaluate the different sites and determine which redevelopment option best aligns with the current market.
- Identify and resolve any obstacles to redevelopment of the opportunity sites.
- Complete due diligence for each opportunity / redevelopment site including environmental reviews, land surveys, infrastructural capacity analysis, zoning, parking regulations, etc.
- Develop revenue estimates of various parking fee options.

IMPROVE PROCESSES

- Hold focus group meetings with the Downtown development and business community to understand barriers and challenges that exist within the current development process.
- Revise development processes and regulations to make it easy to develop a new building, open a new business, and establish a cafe in Downtown. Explore regulations related to height limits, special use permits, cafe permits, parking requirements, etc. Utilize feedback from the listening sessions to change the regulations that have community support.
- Once the highest ranked redevelopment / opportunity site has been identified, move into the Request for Proposal (RFP) process and select a development partner to move the redevelopment project forward.

LESSEN STUDENT PARKING AND TRAFFIC DEMAND IN DOWNTOWN

In order to establish a vibrant retail and restaurant streetscape along North Williamson Avenue, prioritization will need to be given to pedestrian mobility. More people and students living in Downtown will support this type of mobility and reduce the need for parking along the street. With each redevelopment opportunity, off-street parking and under-building parking lots will provide for sufficient parking availability and allow for less on-street parking to monopolize the Downtown right-of-way. Provision of improved sidewalks, street crossings, and alternative modes of transportation will pull demand away from vehicular traffic in and around Downtown, transforming Downtown into a walkable hub.

PROMOTE MOBILITY

- Create and implement a new bicycle network to connect Downtown and the University.
- Use redevelopment sites near the University to create more student housing within walking / biking distance of campus.
- Charge for on-street parking within Downtown during the school year along North Williamson and West Lebanon Avenues. Revenue from paid parking can be utilized to support other parking improvements.

PARTNER WITH THE UNIVERSITY TO CREATE A DOWNTOWN THAT BENEFITS EVERYONE

The student population alone at the University of Elon adds an additional 50% of the total Town population to the area each year. Additionally, the University owns a large portion of property in Downtown. It is of the best interest to both the Town and the University to continue partnering on Downtown projects to make it a place for both communities to enjoy.

ACTIVATION AND COLLABORATION

- Work with student groups to plant and maintain a wildflower strip along the rail corridor in Downtown. Student groups could use this as an opportunity to give back to their community but also to expand education on local horticulture and botany. The Town would benefit through reduced maintenance costs and improved aesthetics for train passengers. The wildflower area would create a unique and striking visual garden unlike any other place along the North Carolina Rail Corridor, making passing through Elon a memorable experience. The Town would need to coordinate with NCRR to ensure support of this project.
- Create a summer entertainment series at the Turner Theater on the University's campus. A summer series would allow for expanded utilization of an existing theater facility during the off-season for students while also serving to attract residents and visitors to Downtown. The series could include a mix of local, visiting, and student performances as well as movies and comedy shows.
- Explore the creation of a skate park Downtown on University property. One option to consider is the lot on the corner of North Holt Avenue and West College Avenue.

A stylized tree logo with a gold trunk and branches, green leaves, and a gold acorn at the top. The trunk is integrated into the letter 'E' of the word 'CEYLON'.

DOWNTOWN
CEYLON
MASTER PLAN



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