

# PATTERNS OF VISITATION TO DOWNTOWN ELM GROVE

With the widespread use of smartphones, it is possible to use tracking data to understand the origins of people visiting Elm Grove's downtown. It is important to note a few things concerning the data: 1) it is a sample collected over a twelve-month period from September of 2017 to September of 2018; 2) the sample contains a small bias in that it only collects information for people that have a smartphone and have opted in to having their location tracked; 3) the data count the number of times that person visited the downtown during the year, and 4) the data only indicate a presence in the area, and not whether that person patronized any of the downtown's businesses.

The conclusions drawn from this data may come as a surprise to many residents, and even business owners in Elm Grove. The downtown receives traffic from a very large area. The timing of peak volumes, on weekdays, suggests that a good deal of this may be related to employment at area businesses. The amount of traffic drops off considerably in the evening hours and on weekends. As a shopping and dining area, Elm Grove does have the ability to generate higher customer volumes by targeting the workday business and employee market, travelers, and nearby residents during off-peak times (evening and weekend). In addition, the presence of the Bluemound Road commercial strip, anchored by Brookfield Square and The Corners of Brookfield presents another opportunity to capture regional traffic for both retail and dining.

## General Patterns of Visitation

Downtown Elm Grove is drawing visitors from all over the United States (Map 1). Those from more distant locations may include part-time residents with a second home in northern Wisconsin or a warmer climate, family and friends of area residents, and business travelers. Map 2 offers a more regional picture and shows the flow of traffic from the Chicago and Minneapolis metropolitan areas, which is likely to include significant business travel. There are also clusters of visitors from Northern Wisconsin and Door County, where it is likely that some visitors own second homes. The final view (Map 4) helps to visualize the core areas from which downtown Elm Grove is drawing visitors, in Elm Grove, Brookfield, New Berlin, Waukesha, and the central and eastern parts of the City of Milwaukee.

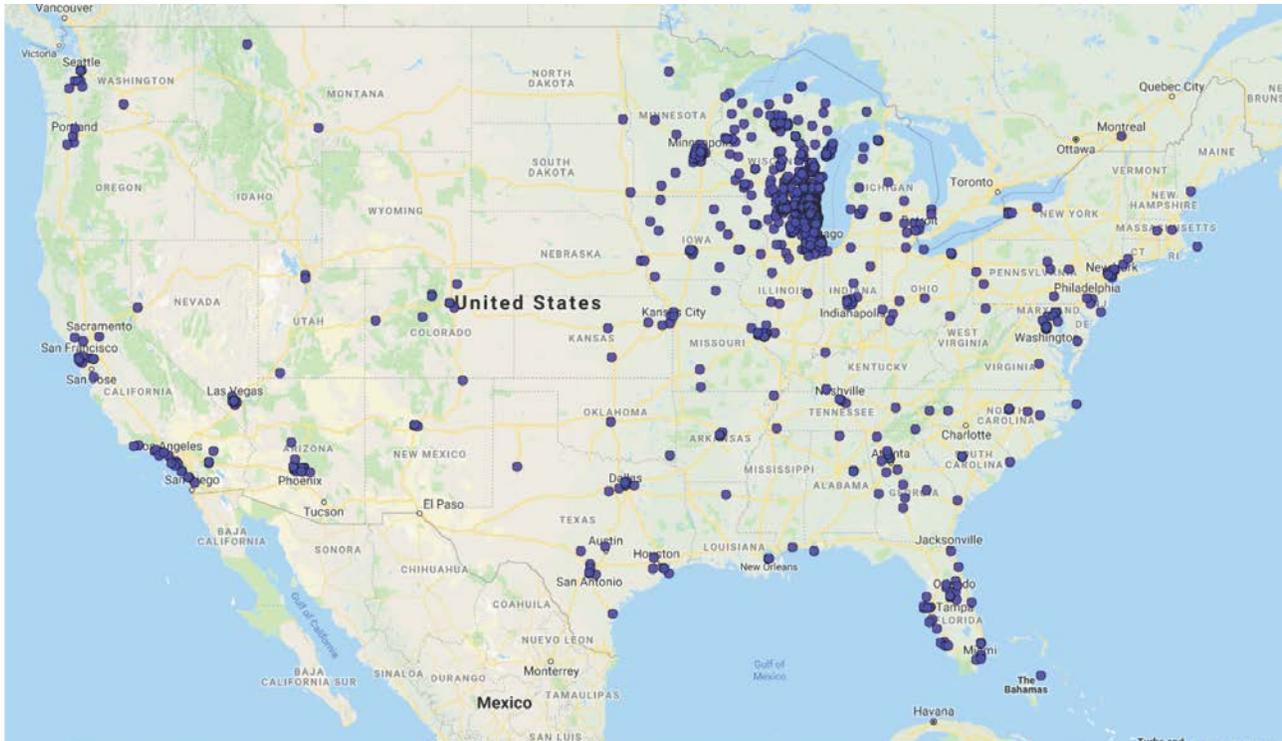
The average person in the sample visited downtown Elm Grove 2.3 times during the year. For comparative purposes, patrons of Brookfield Square made an average of 1.5 trips over the year. The mall does draw more evenly across the region, with a higher density of visitors, and it does draw more effectively from parts of the metropolitan area that are further from the central city (Maps 3 and 5). Traffic drawn to the mall and to other commercial areas along Bluemound Road could be targeted as an opportunity to bring additional customers to businesses in downtown Elm Grove, which is less than one mile away.

Mayfair Mall is also only a little over two miles to the northwest, and might be another opportunity to "piggyback" on to try to draw new customers. Both of these malls and the commercial development surrounding them are tenanted by chain retail. Though some of these stores and restaurants are unique-to-market, they may not appeal to shoppers and diners who are looking for a truly unique and authentic experience, as can be delivered in downtown Elm Grove.

## Visitation by Day and Time

Downtown Elm Grove sees its heaviest traffic in the midday hours on week days. There is a significant contrast between the weekday draw and that on the weekends, with far fewer visitors coming on Saturday and Sunday, and mostly from a shorter distance.

Map 1: Home Location of Visitors to Downtown Elm Grove – National View



This lunchtime peak is likely associated with the very large number of people working within the area. There are more than 187,000 people working within a five-mile radius of the downtown, many of whom are employed in managerial and technical positions that are associated with higher rates of spending on meals and snacks, as well as some categories of retail. The morning traffic is nearly as significant, which may be explained in part by breakfast traffic and business meetings, which tend to be held more commonly in the morning hours.

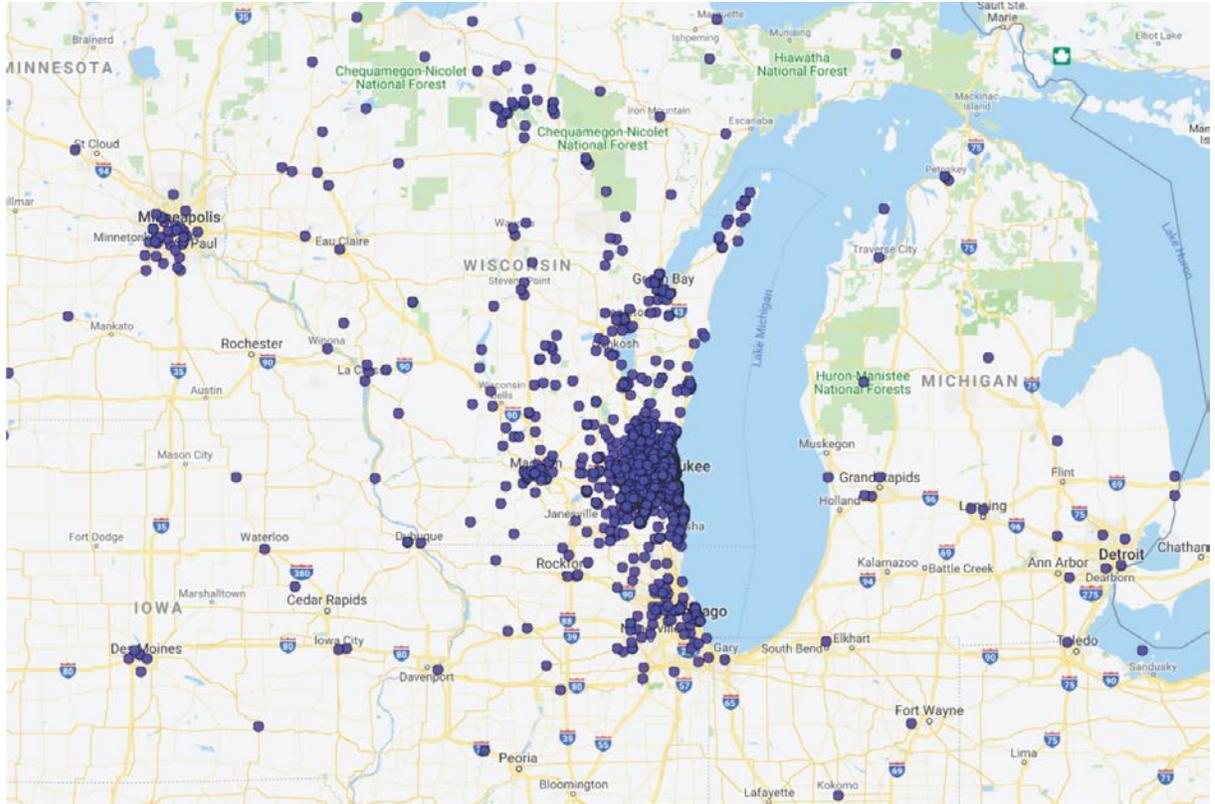
Traffic begins to fall off in the afternoon and accelerates through the dinner hours and into the evening. This is partly a reflection of the business mix and their hours of operation. In general, the late afternoon and early evening hours see a spike in shopping and dining. Most of the downtown's businesses are closed by 5:00 PM, and there are not many restaurants that would generate significant traffic. There are fewer bars or taverns that would attract a late evening crowd.

The business mix and the ability to sustain an active street life into the early evening may be a consideration for the Village and property owners or developers. For restaurants and many types of retail, the early evening is when the most spending occurs. If businesses are to support the higher rent that comes with redevelopment, they will need to gain a share of those purchases. Businesses in places like downtown Wauwatosa and downtown Waukesha have been successful in doing this, including retailers who remain open until 7:00 or 8:00 PM.

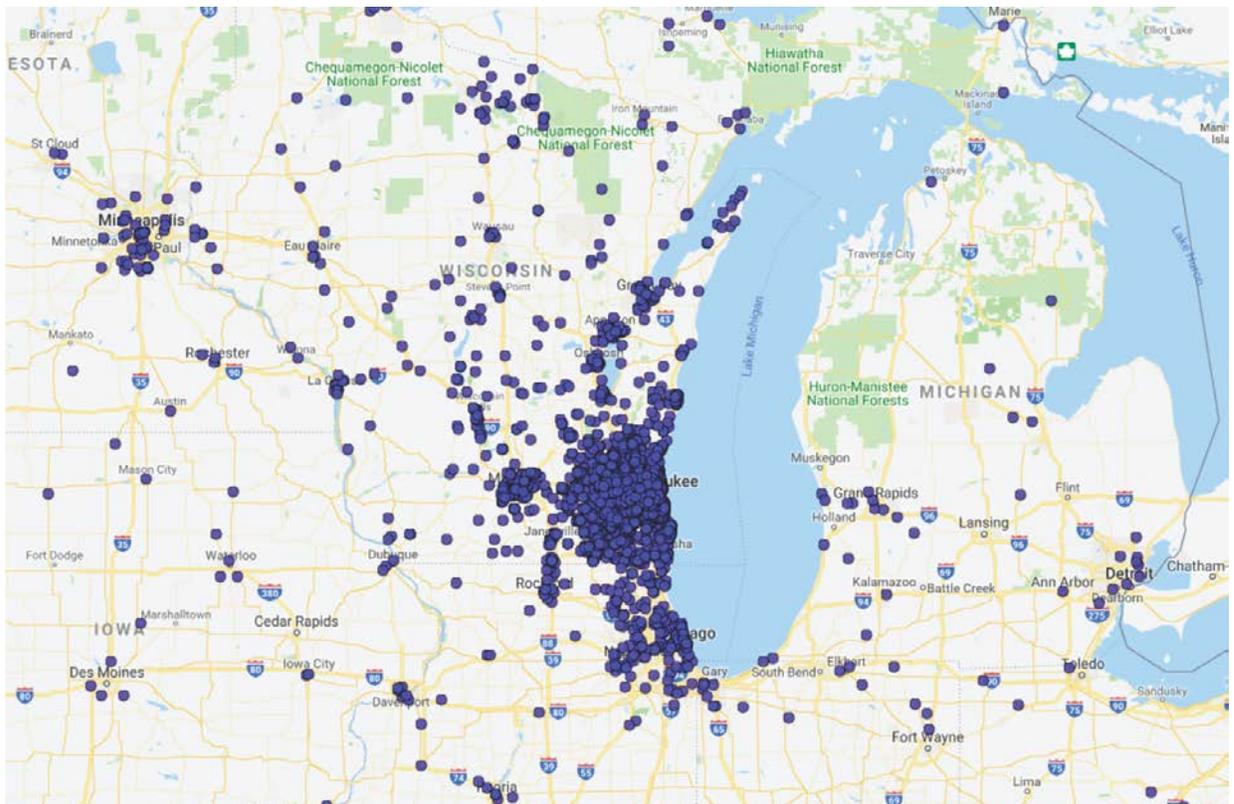
### Path to Purchase

Map 13 depicts a "path to purchase". It is based on the location of the cell phone user two hours prior to their entry into the study area, and helps to describe the routes taken by visitors to get to downtown Elm Grove.

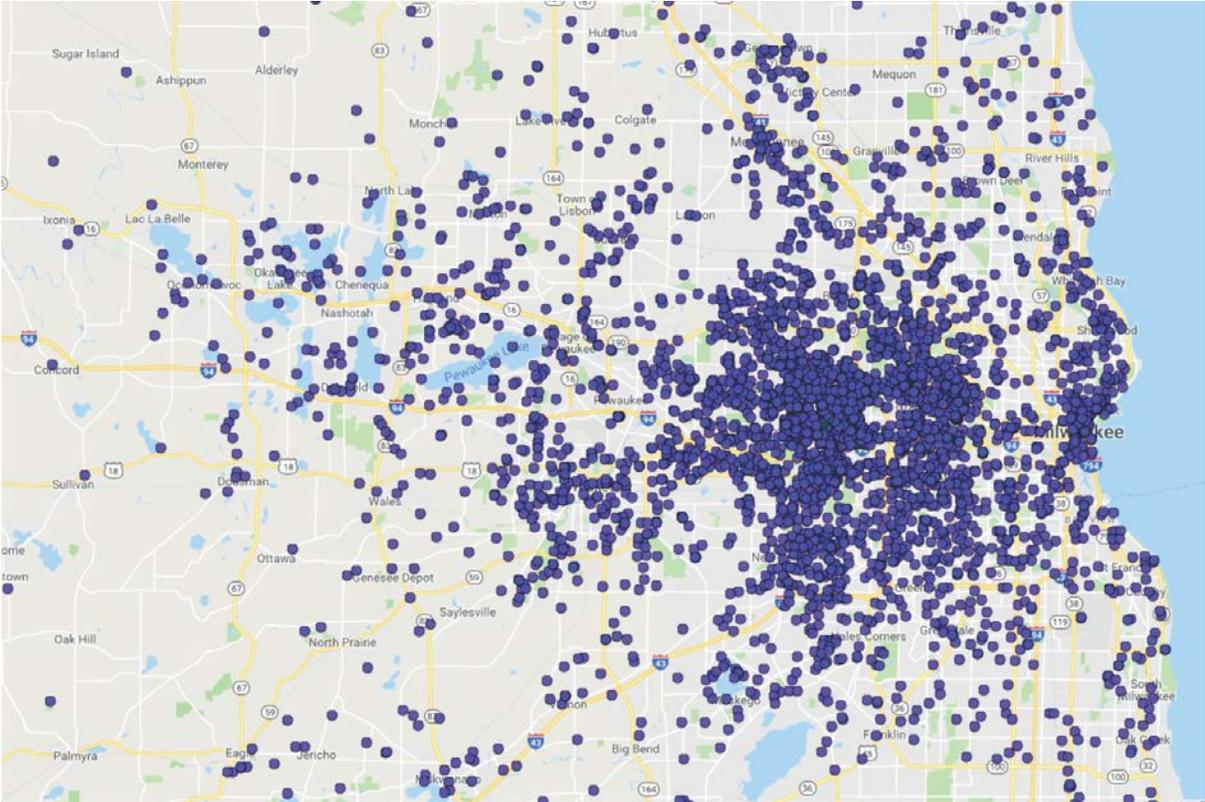
Map 2: Home Location of Visitors to Downtown Elm Grove – Regional View



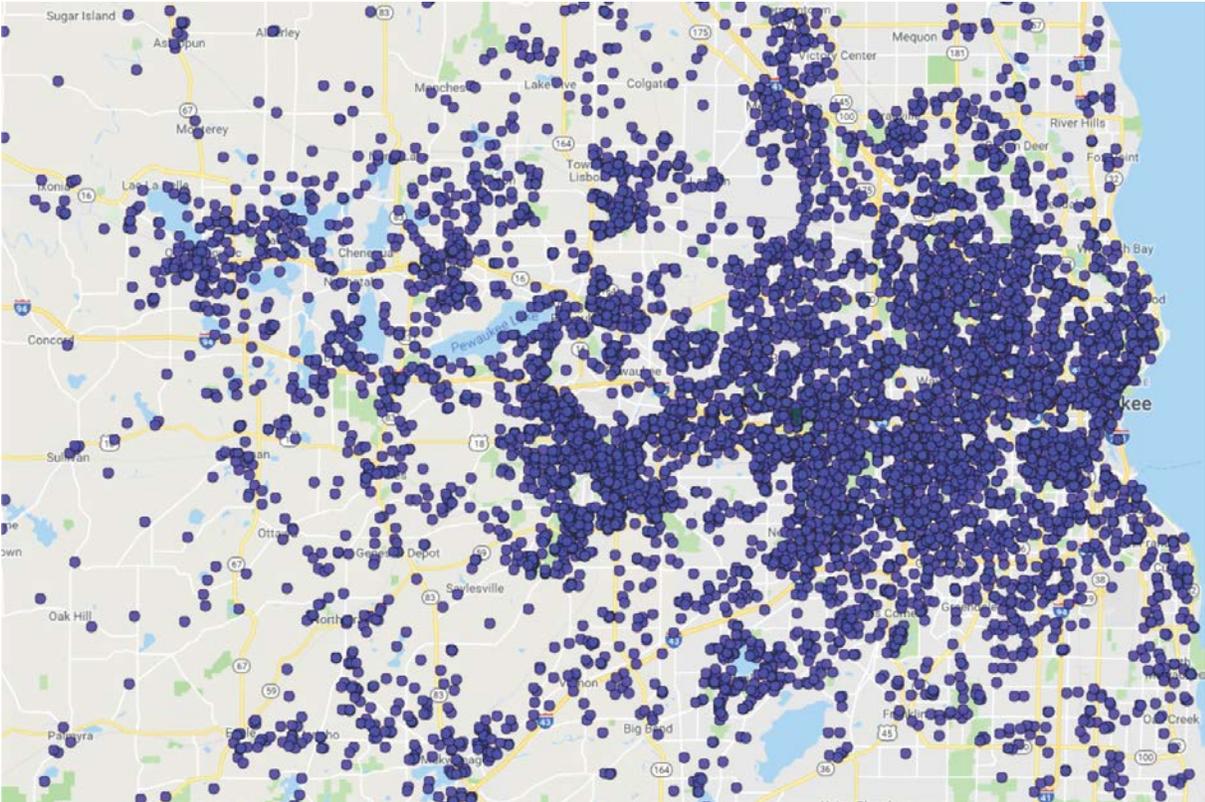
Map 3: Home Location of Visitors to Brookfield Square – Regional View



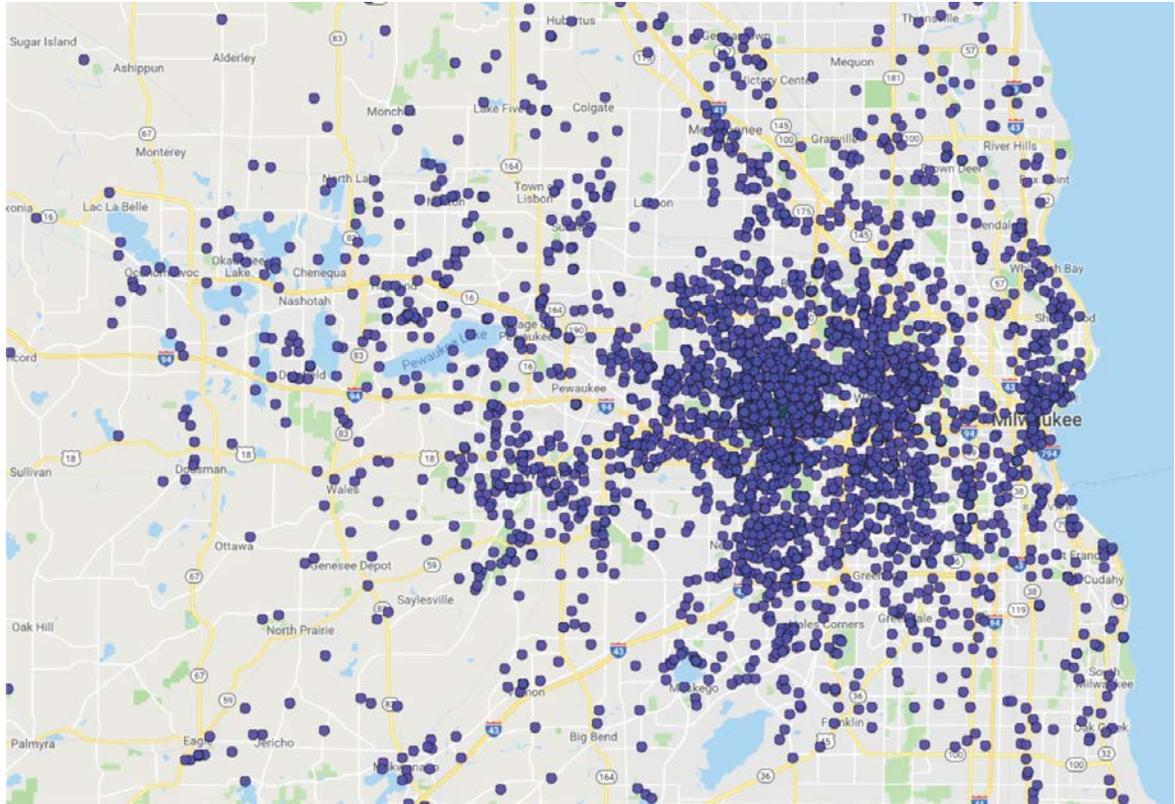
Map 4: Home Location of Visitors to Downtown Elm Grove – Local View



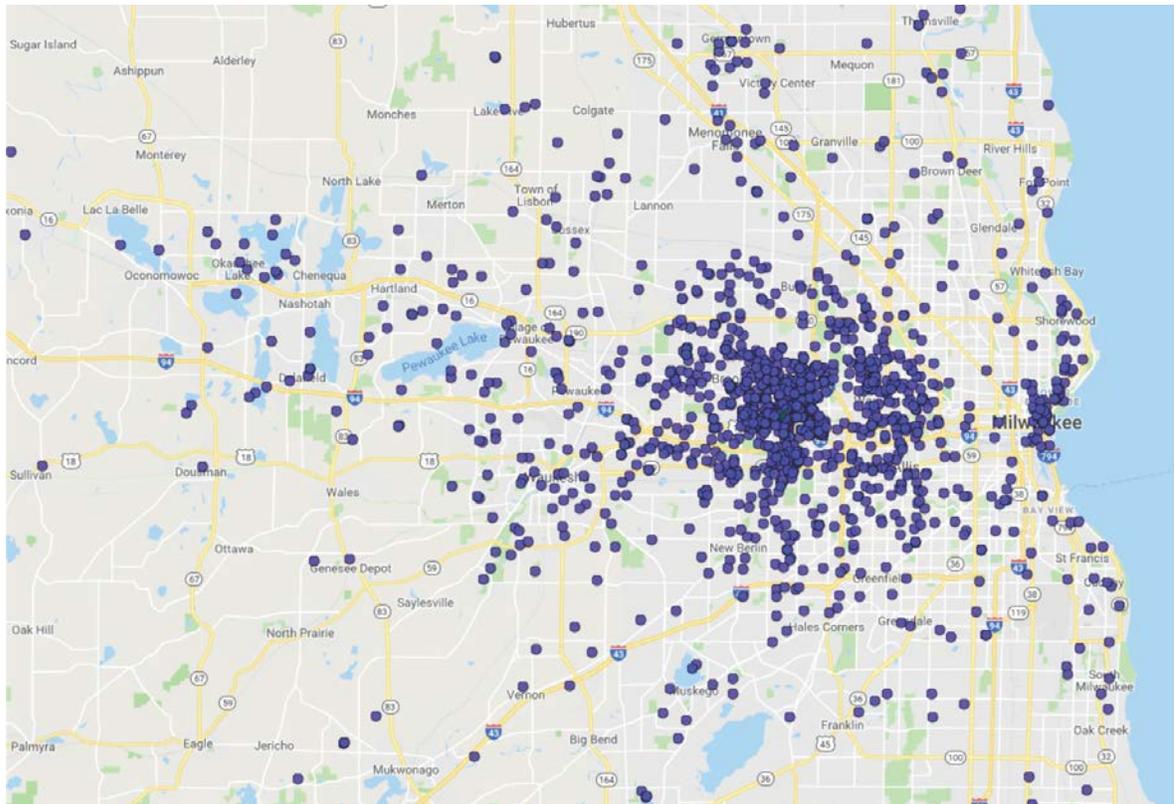
Map 5: Home Locations of Visitors to Brookfield Square – Local View



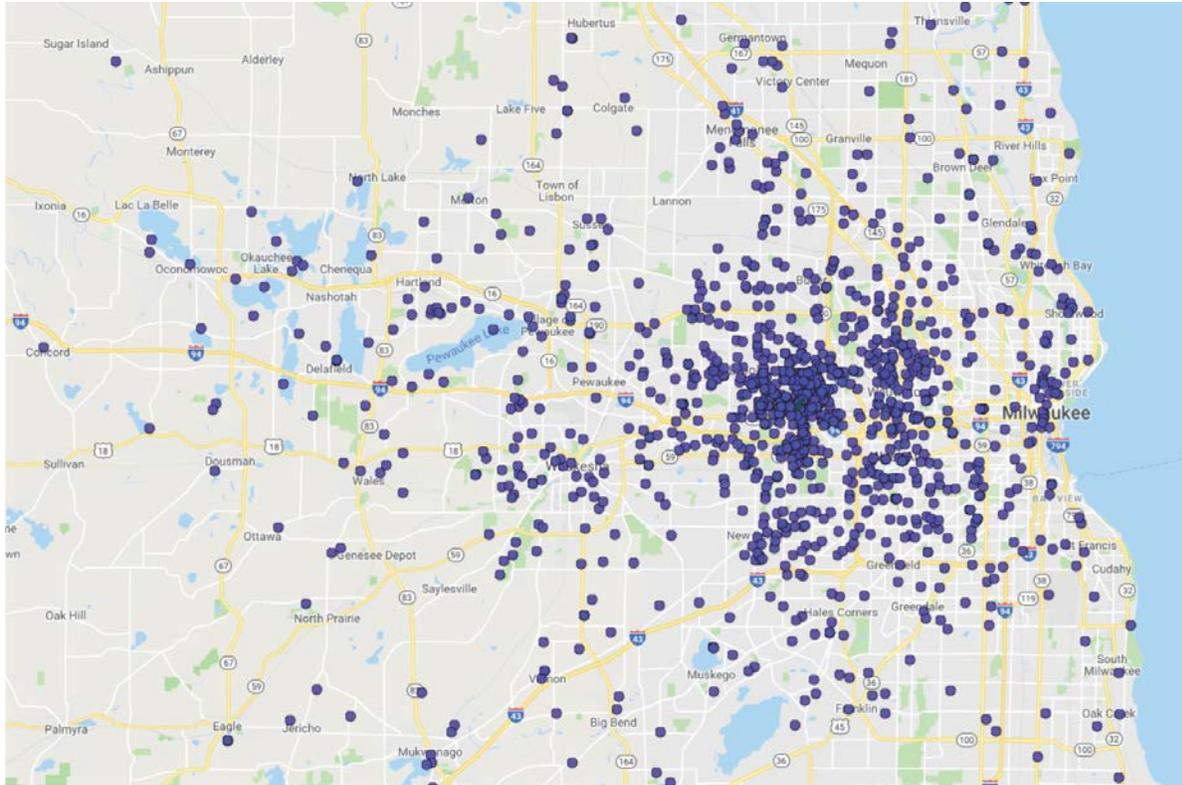
Map 6: Home Locations of Weekday Visitors to Downtown Elm Grove



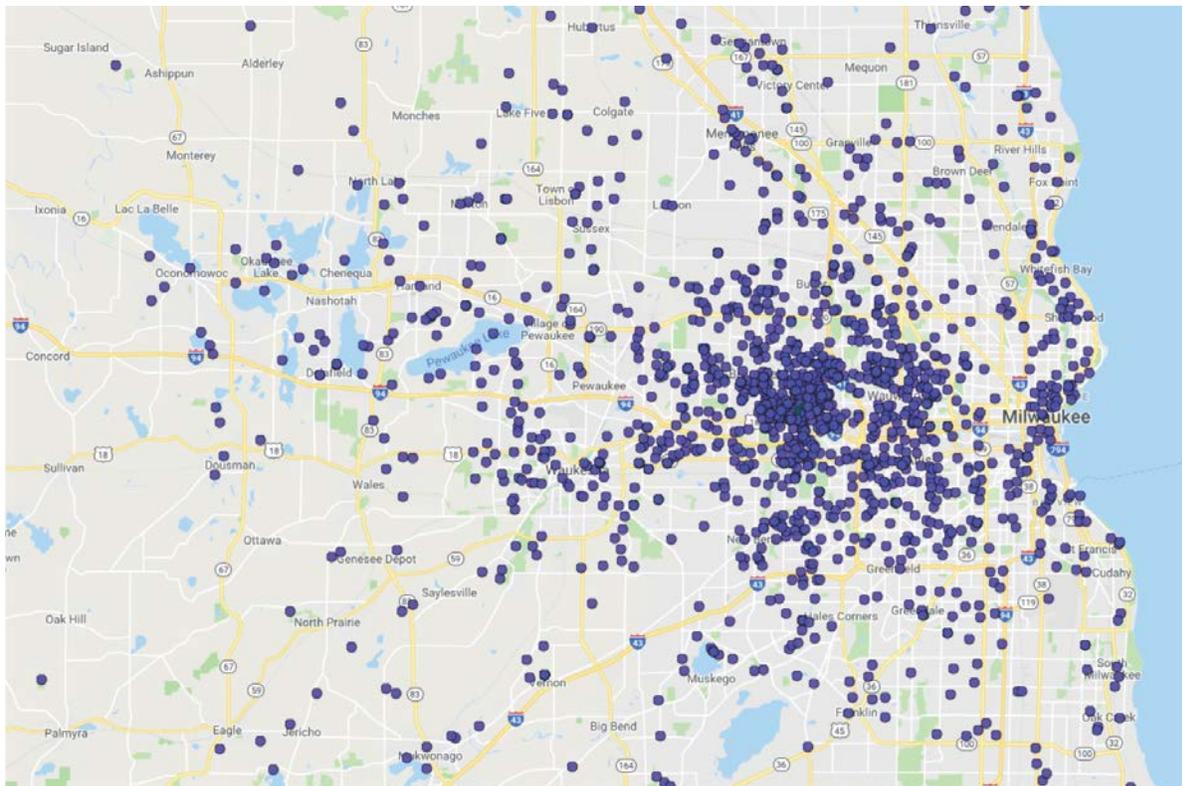
Map 7: Home Locations of Weekend Visitors to Downtown Elm Grove



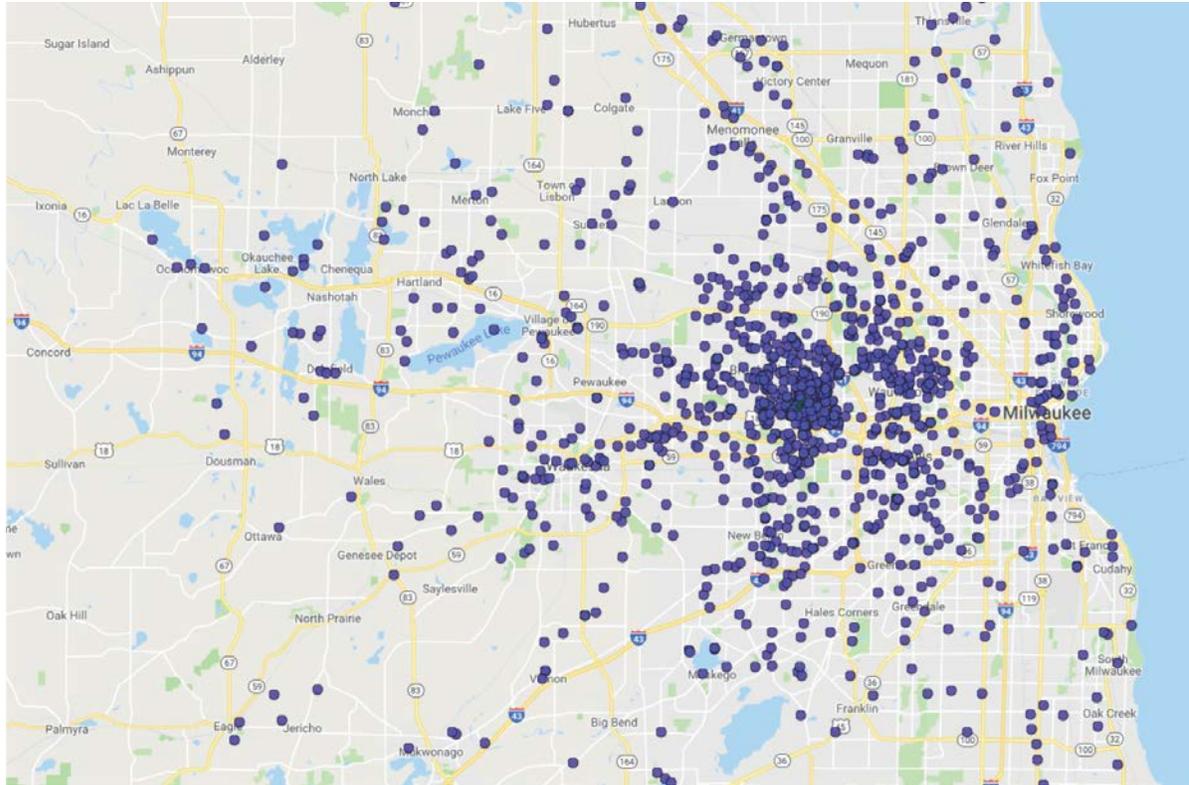
Map 8: Morning Visitors to Downtown Elm Grove – 8AM to 11AM



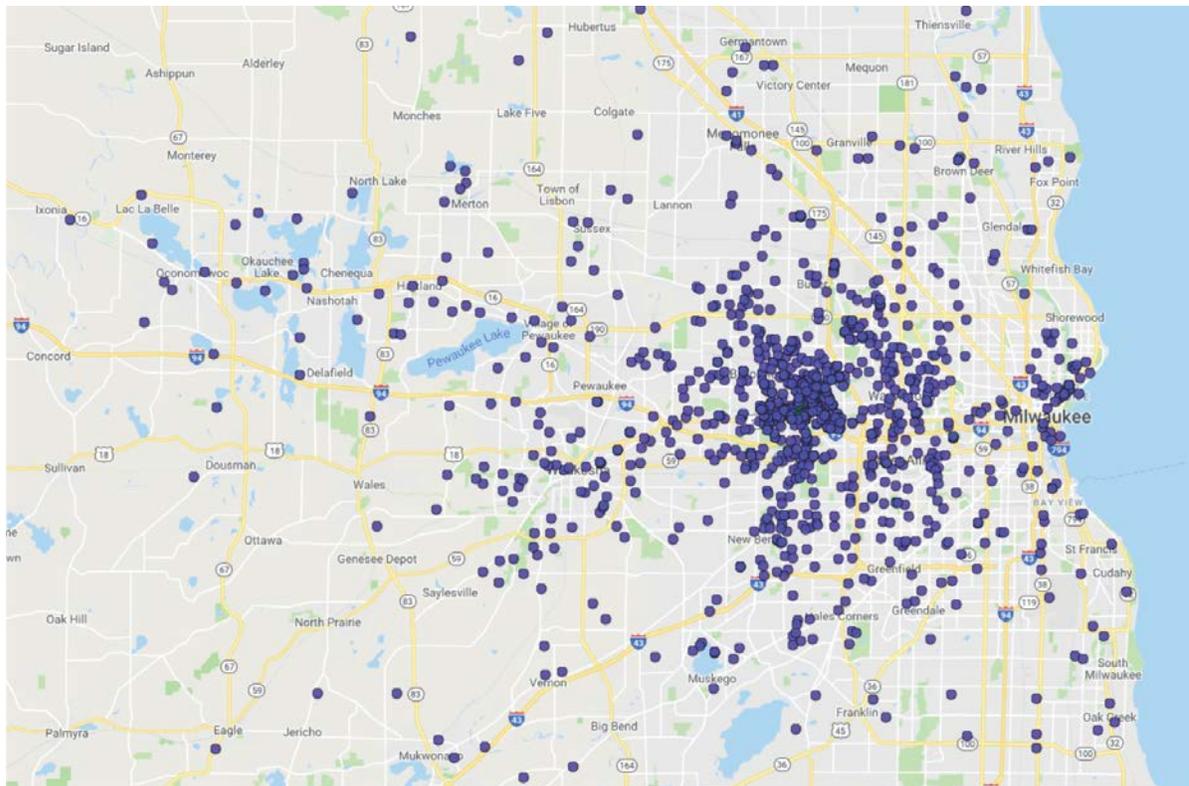
Map 9: Lunchtime Visitors to Downtown Elm Grove – 1AM to 2PM



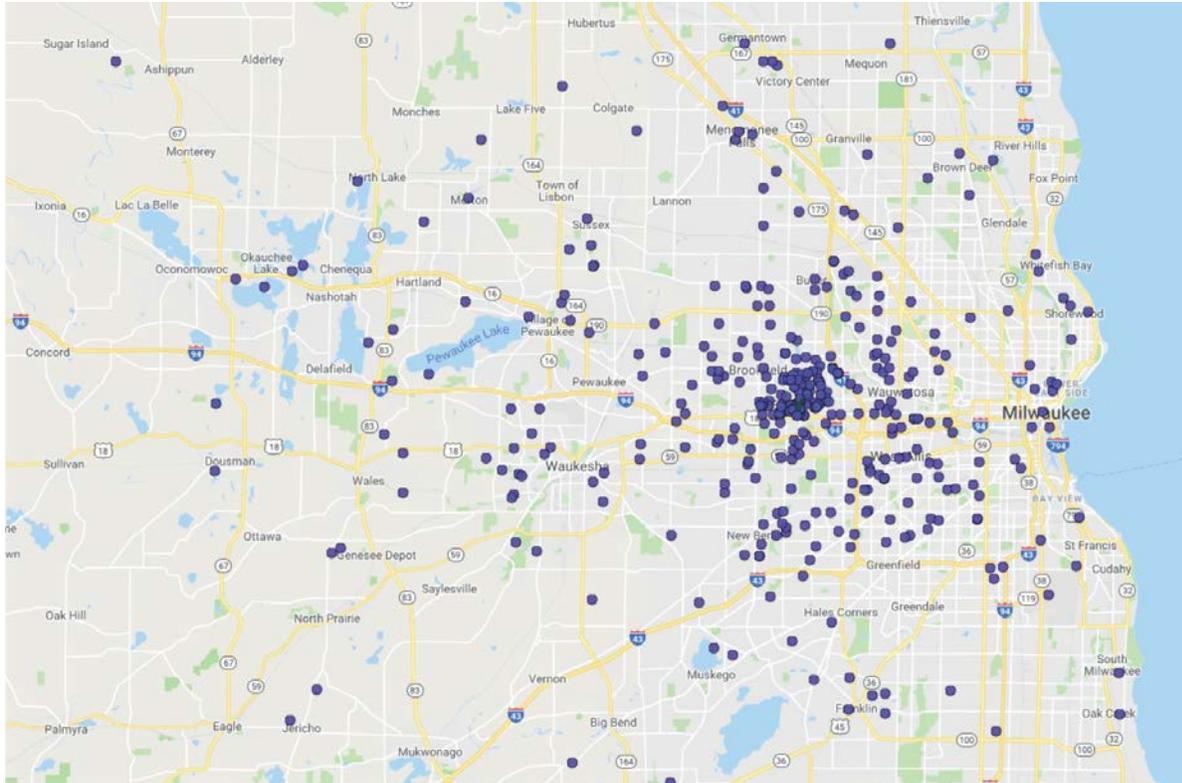
Map 10: Afternoon Visitors to Downtown Elm Grove – 2PM to 5PM



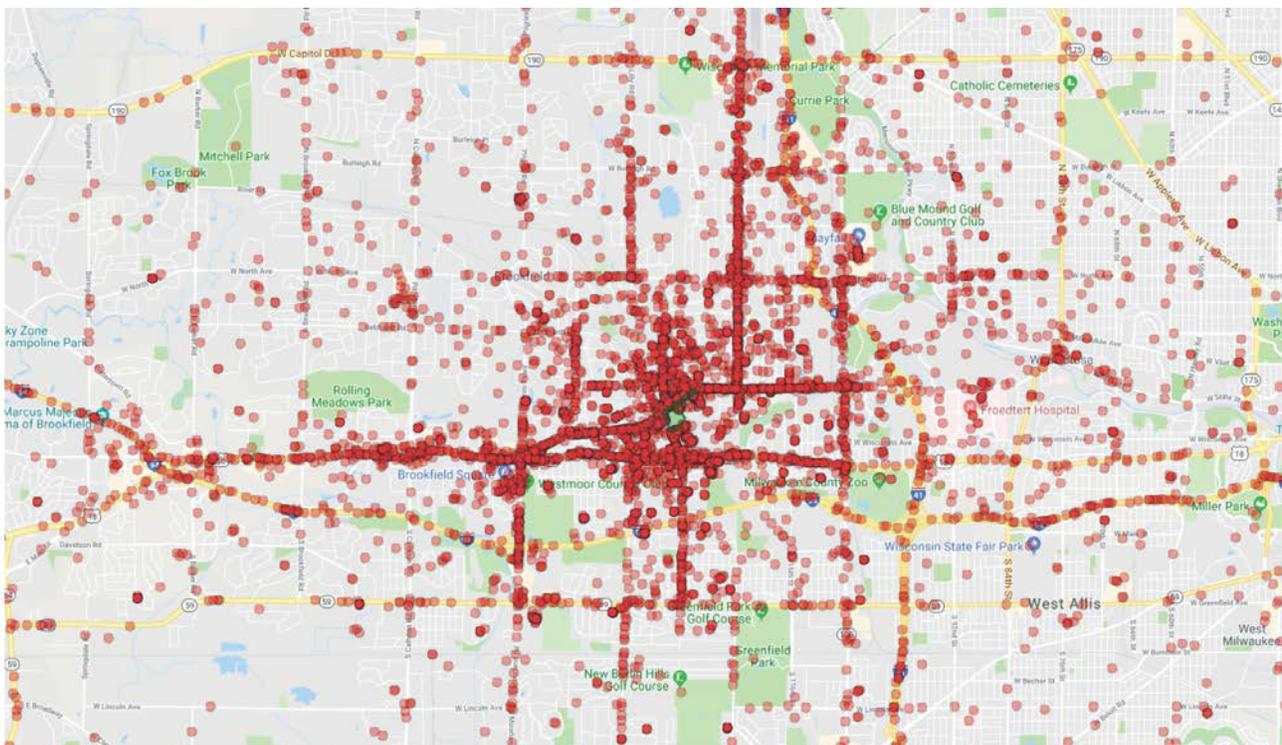
Map 11: Dinnertime Visitors to Downtown Elm Grove – 5PM to 8PM



Map 12: Nighttime Visitors to Downtown Elm Grove – 8PM to 11PM



Map 13: Path to Purchase



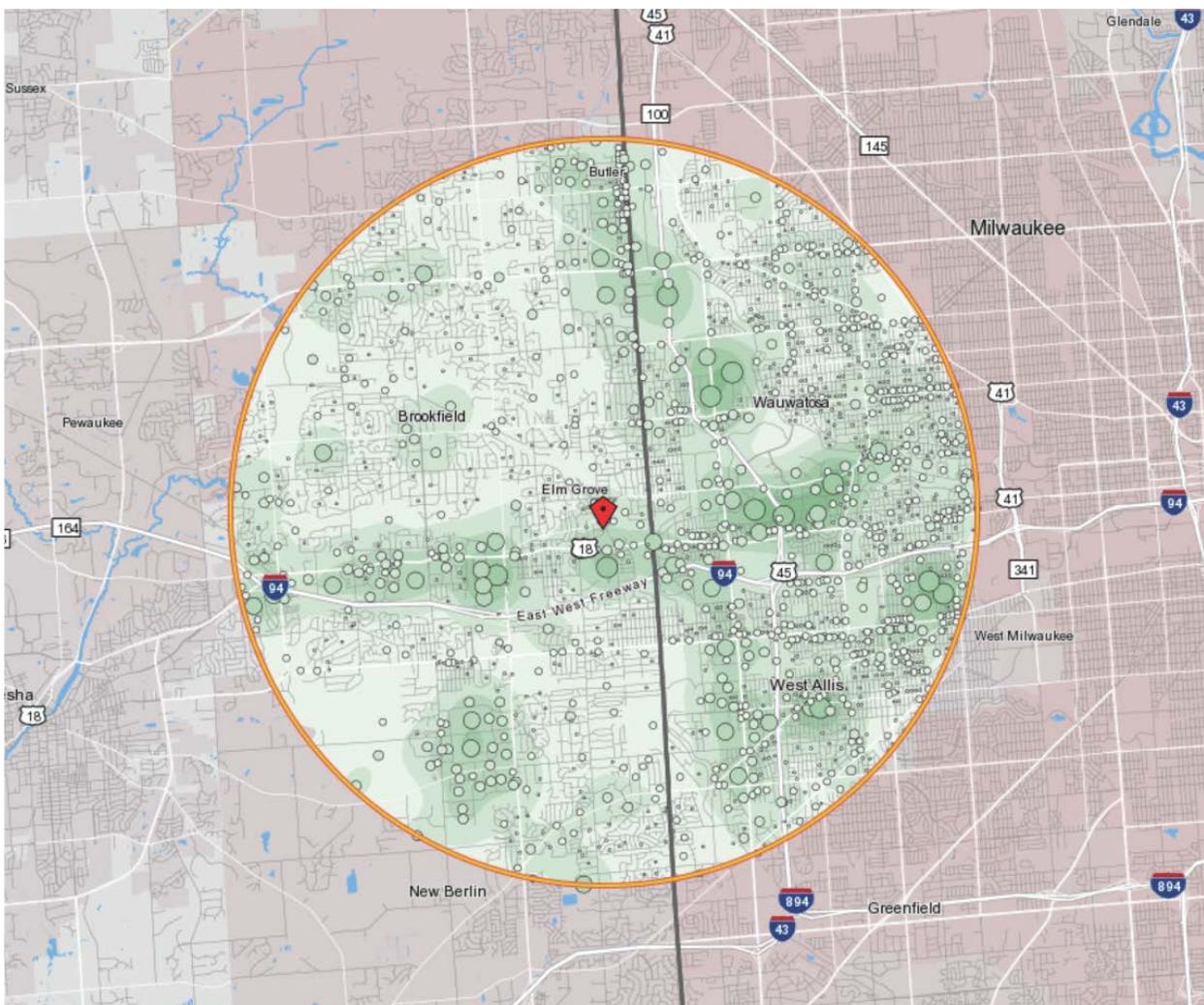
## Daytime Location and Visitation

Just as it is possible to examine patterns of visitation based on where the cell phone user is usually located in the evening (typically at home), it is also possible to examine patterns based on where the user usually is during the day (typically at work). To better reflect the worker segment, the data were filtered to only examine weekday patterns.

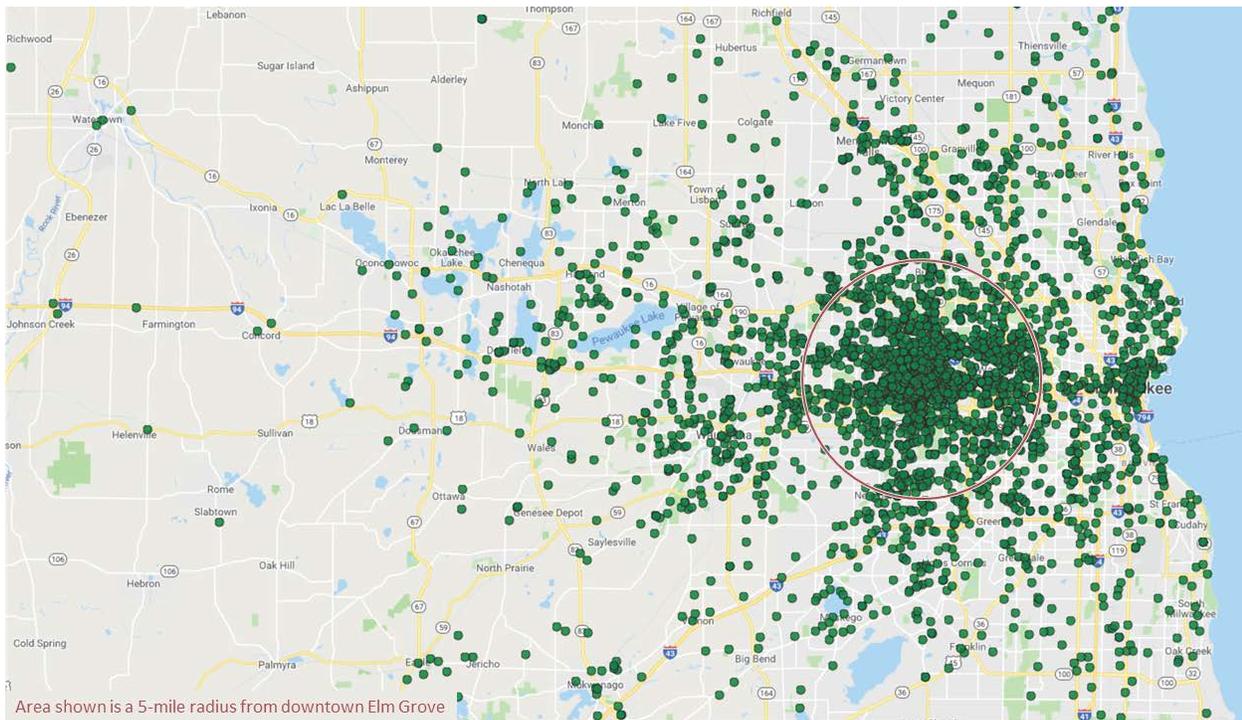
Based on data from the Bureau of Labor Statistics, there are over 187,000 people working within a five mile radius of downtown Elm Grove. This number is essentially unchanged from a decade earlier. The density of where these workers are located is shown in Map 14. Concentrations lie along the major transportation corridors (Bluemound Road, Highway 45, and Highway 100) and in industrial zones in New Berlin and West Allis.

Map 15 depicts the usual daytime (work) location of visitors to downtown Elm Grove. The same five-mile radius is depicted on the map. This map does confirm that a majority of visitors works within that area. Map 16 presents a closer view, where it is particularly interesting to note the cluster of locations at Froedert Hospital.

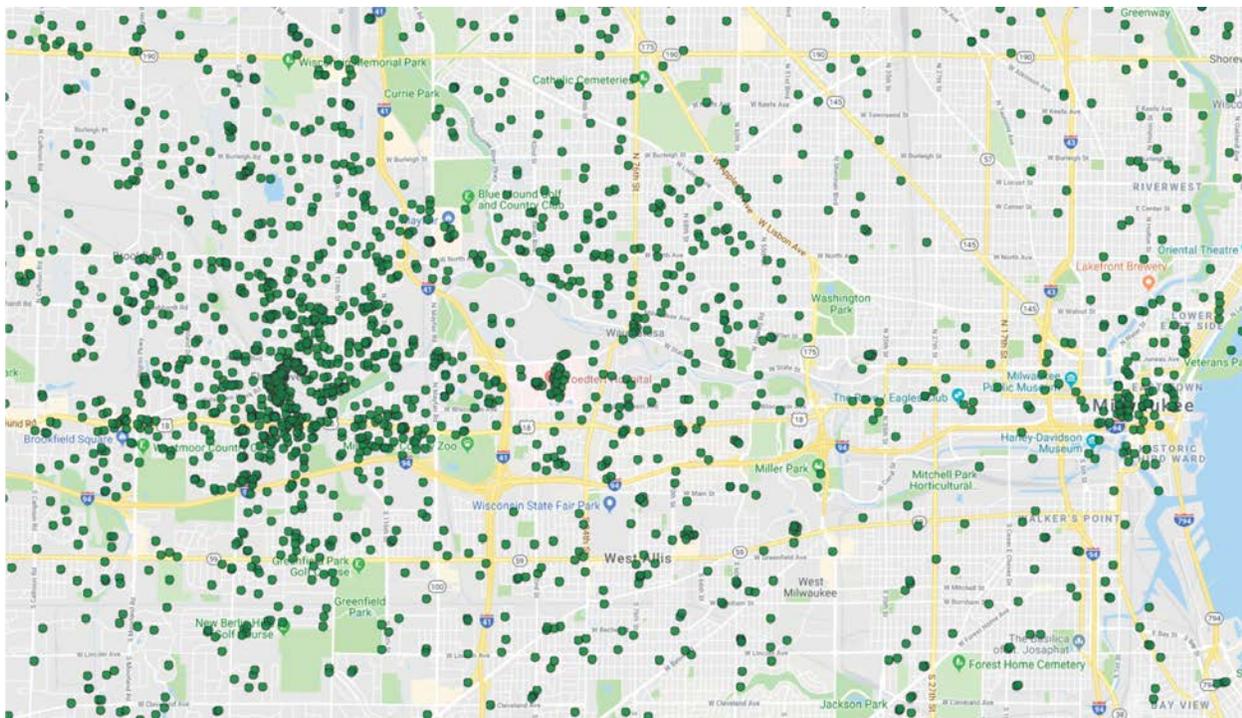
Map 14: Concentration of Workers in a 5-Mile Radius of Downtown Elm Grove



Map 15: Daytime Weekday Location of Visitors to Downtown Elm Grove



Map 16: Daytime Weekday Location of Visitors to Downtown Elm Grove – Local View



## Implications of the Data for Downtown Elm Grove

Several conclusions can be drawn from this data that have implications for what uses might be successful in downtown Elm Grove, and what marketing and business practices are likely to result in greater customer traffic. These are some of the key observations.

- Downtown Elm Grove sees a considerable volume of traffic from well beyond simply the surrounding neighborhoods.
- Visitation peaks in the midday hours and falls off quickly in the late afternoon and evening. Weekdays also see much more traffic than weekend days.
- Over 187,000 people work within five miles of the downtown, and the district is seeing a majority of its worker visits from that area.
- Considering the very large number of workers nearby, and the peak business times in the district, it is reasonable to assume that those workers make up many of the visitors whose home is a further distance from the downtown.
- In comparison to downtown Elm Grove, Brookfield Square draws further and more uniformly across the metropolitan area, but has a lower frequency of visits.

In response to this insight, the following are some actions might be taken by businesses and the district to enhance sales.

- Targeted marketing can focus on people working nearby, particularly at Froedert Hospital and at nearby office parks. That can be matched with specials bases on time of day, such as breakfast, mid-morning (business meetings), lunch, and dinner.
- Nearby residents should be targeted for late afternoon and dinner traffic. In conjunction with this, businesses may consider later hours to allow people to stop on their way home from work or in the early evening.
- Marketing can also focus on traffic to Brookfield Square, The Corners of Brookfield, other commercial sites along Bluemound Road, and even Mayfair Mall. These areas are better-known and draw more widely than the downtown, and some of their customers may make Elm Grove a stop on their shopping trip, particularly if it can offer quality alternatives to the kinds of chain businesses found in the malls.

The data also suggest some strategies for commercial real estate development and the business mix that might be supported in the downtown.

- Restaurants and other eating and drinking places will appeal to both residents and the very large worker population in the area. These can include full-service and quick-service (comparable to chains like Panera), and other types of food services like coffee shops. In contrast to Bluemound Road and Mayfair Road, the downtown should contain a majority of non-chain establishments.
- Retail may take two approaches. The first is to continue to provide the uses, like the Sendik's grocery store, that serve nearby residents. The second approach will be to curate a selection of independent and smaller chain specialty stores that complement, and offer an alternative to the chain businesses found in the malls. Examples might include apparel and accessories, furniture and home furnishings, gifts and novelties, art and arts/crafts supplies, toys and hobbies, and similar uses.