Local Retail and “Community”

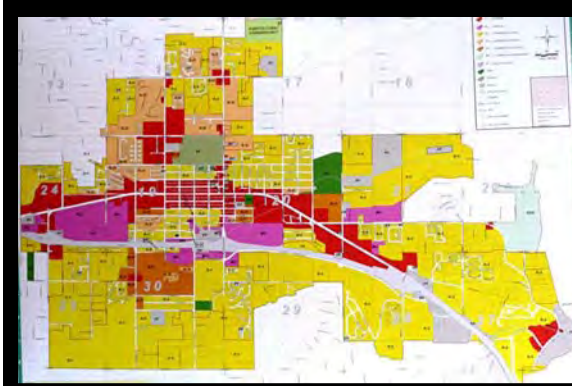
A cornerstone of “place” . . .

- Goods and services
- Major tax base > public facilities and services
- Employment
- Gathering place (spontaneous encounters)
- Identity

A common response to the GMA

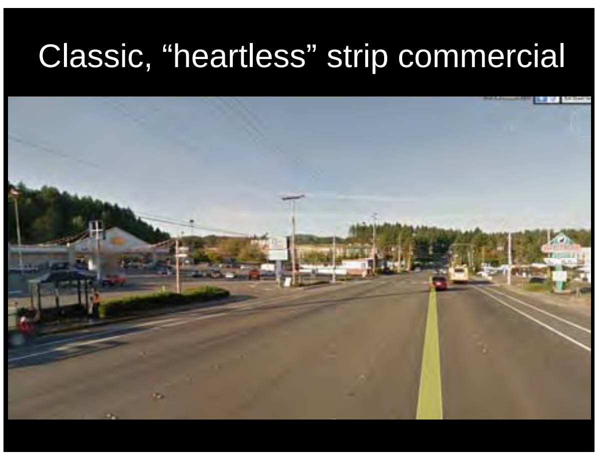
- Places to focus growth: Downtowns, Town Centers, neighborhood centers, “villages”
- Attract M/F; maintain S/F
- Broaden ranges of housing type and lifestyle choice
- Increase affordability of multi-modal transportation
- Promote walking (improve public health)

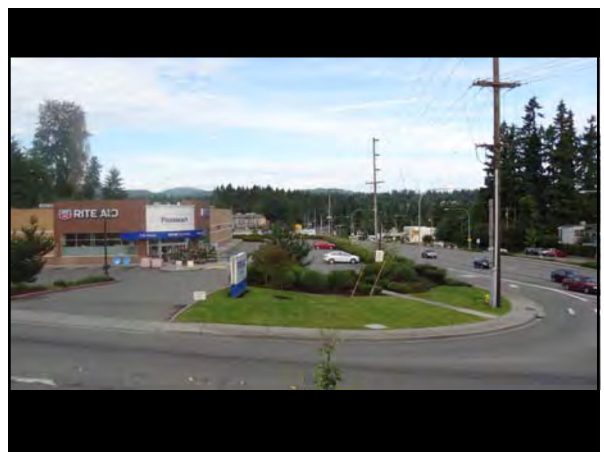
Sequim FLUM (2006)



A potential center?

Inertia


Classic, “heartless” strip commercial

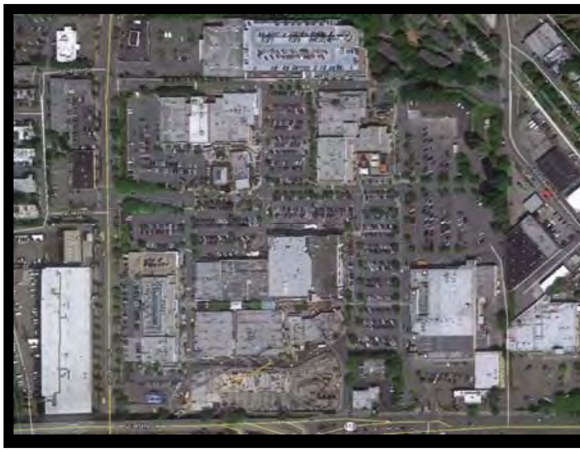

RITE AID


What the developer wanted


What staying the course produced

Key planning elements / issues:

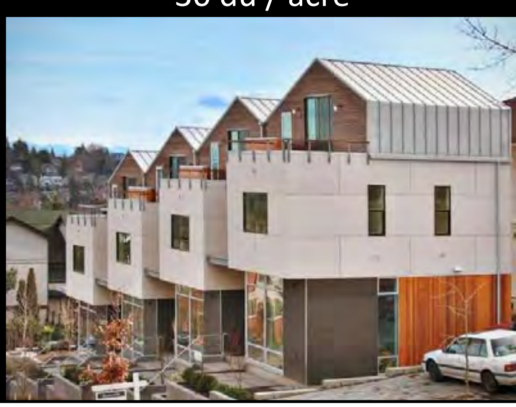
- Retail place as amenity as well as attractor
- Density within a walkable distance; how many people?
- Scale, gradations, privacy, views
- Traffic of all kinds
- Parking
- Contributing to community identity



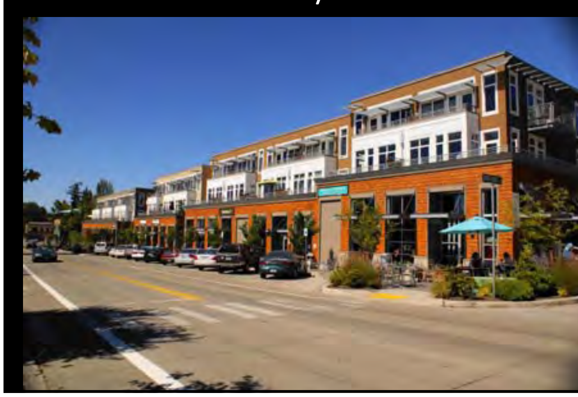
Population + distance = market

15 du / acre

30 du / acre

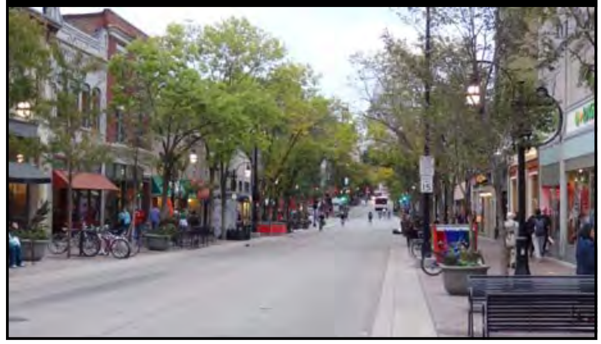


40+ du / acre



60-100+ du / acre

Traditional urban neighborhood retail street (2-4 stories)



Downtown Sequim tomorrow

Basic, universal design elements:

- Retail "set-to" lines / parking in rear or under
- Avoid voids and blank walls
- Sidewalk width > holding hands; cafes
- Weather protection (rain and sun)
- Window transparency
- Interval / identity of entries
- Signs (and signs, and signs)
- Street furniture and landscaping

Sidewalks and canopies

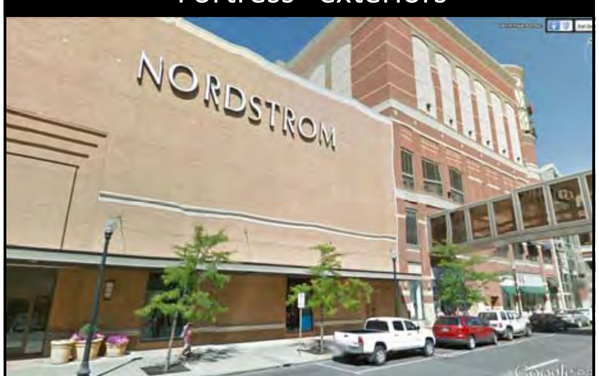
Canopies vs awnings

Avoid the drip line (5’ minimum)

Entries, cover / shade, width

Image management

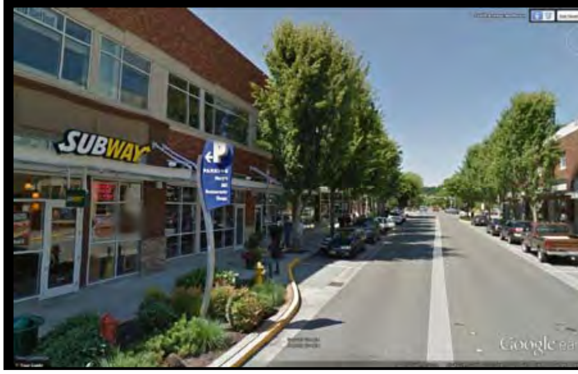
“Fortress” exteriors



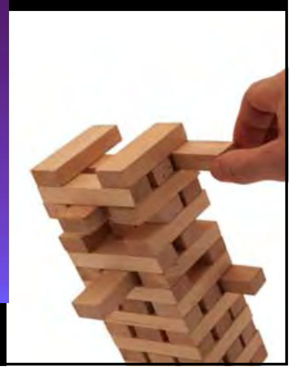
No blank walls (cineplex backside)

Void w/ retail conversion option

Set-to lines, windows, canopies, landscape, entries, parking, signs . . . .



Rooflines
Colors



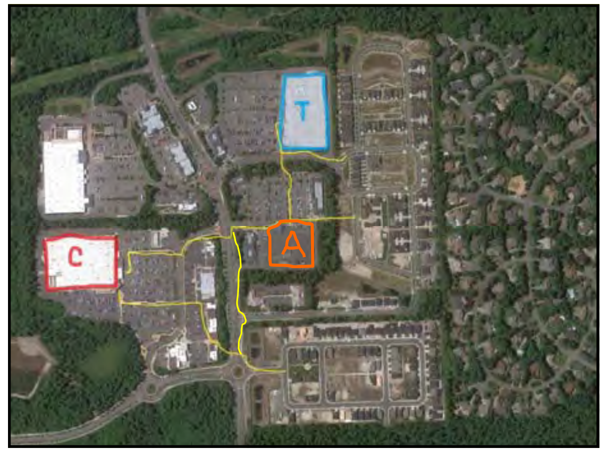
Upper Façade Elements

Windows
Canopies
Landscape

Set-to lines
Parking
Sidewalks

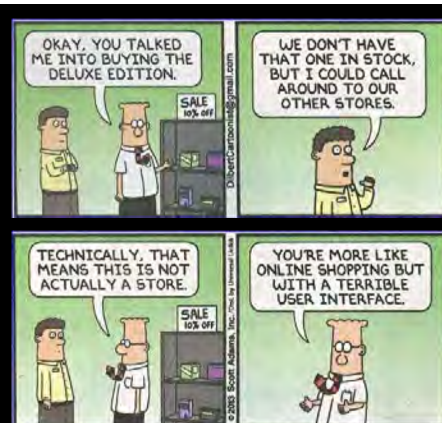
We get what we expect

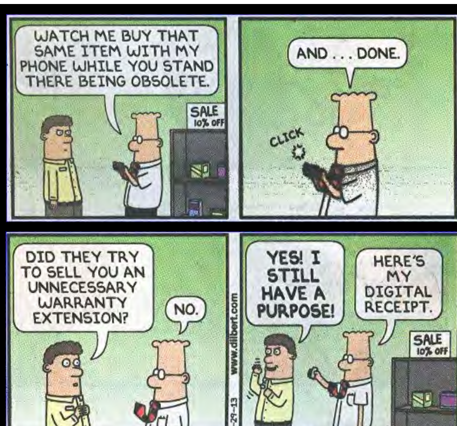

Middleton Hills, WI
(Frank Lloyd Wright country)


T
A
C


Walkable
Well buffered

So, why this?



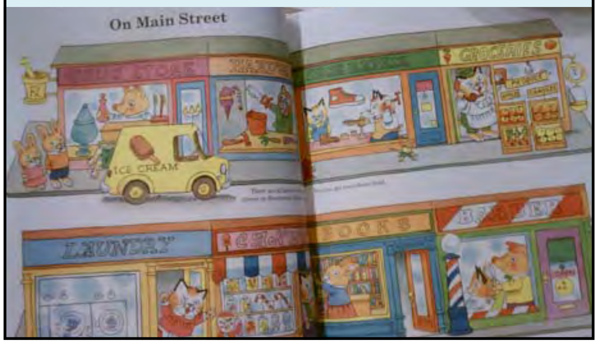


Books, music, electronics - what next?


Burning questions?

Shop Talk: Local Retail Planning

Jennifer Gerend, Chris Hugo, Chris Mefford



I. About the survey

Municipal Retail Planning in WA State

Scientific survey team:
Jennifer Gerend, Ph.D., AICP
Ralph Murphy, Ph.D.
Mathew Novak, Ph.D.
Shira Moch (undergraduate research assistant)

With support from The Evergreen State College

I. About the survey

States with no state income tax

**Note: New Hampshire and Tennessee tax dividends and interest.*
Source: Kiplinger 2013

I. About the survey

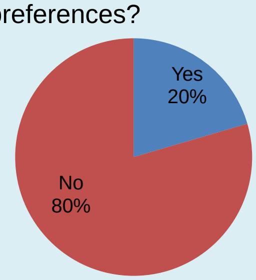
- What are the planning and data use practices among municipalities?
- How do the different retail areas in a city function today (especially downtown)?
- What is the nature of competition for retail among municipalities?
- How are municipalities analyzing their planning work and preparing for the future of retail?

I. About the survey

- Electronic survey sent to 110 small-medium sized WA municipalities (population 5,000- 100,000)
- Distributed to community development/ planning department directors
- 83 responses (9-16-13) = 75% response rate

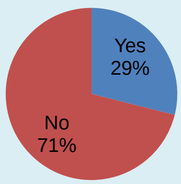
II. Selected preliminary findings: local data

2. Has your municipality recently surveyed residents and/or shoppers about retail conditions and preferences?



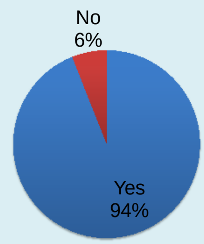
II. Selected preliminary findings: local data

3a. Does your municipality maintain an updated, complete retail database?



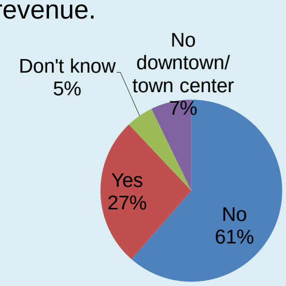
II. Selected preliminary findings: downtowns

9a. Does your municipality have an identified downtown/ town center?



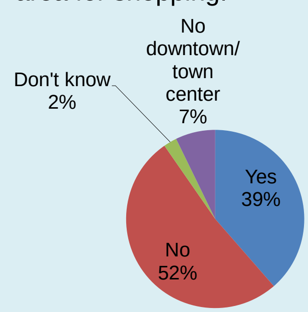
II. Selected preliminary findings: downtowns

14a. Our downtown/ town center is our municipality's most important area for generating sales tax revenue.



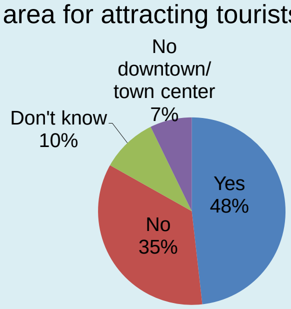
II. Selected preliminary findings: downtowns

14b. Our downtown/ town center is our municipality's most important area for shopping.



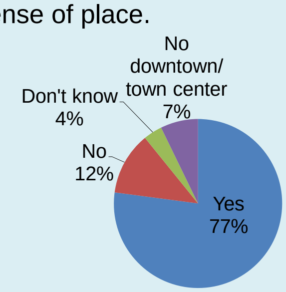
II. Selected preliminary findings: downtowns

14c. Our downtown/ town center is our municipality's most important area for attracting tourists.



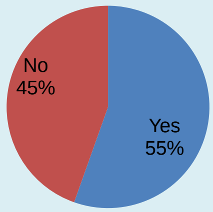
II. Selected preliminary findings: downtowns

14d. Our downtown/ town center is our municipality's most important area for the community identity/ sense of place.



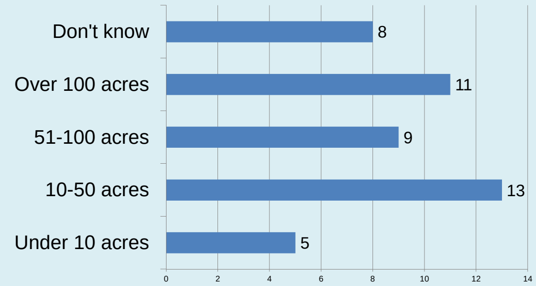
II. Selected preliminary findings: greenfield land available

18a. Do you have greenfield land available and zoned for new retail development?



II. Selected preliminary findings: greenfield land available

18b. Approximately how many total acres?



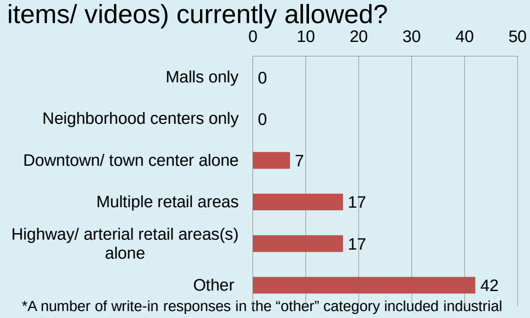
II. Selected preliminary findings: food trucks

17a. Does your municipality allow food trucks?

Yes: 77% No: 23%

II. Selected preliminary findings: adult uses

16e. In which retail areas of your municipality are adult retail (sex-related items/ videos) currently allowed?



*A number of write-in responses in the "other" category included industrial or light manufacturing areas.

II. Selected preliminary findings: adult uses/ marijuana

16b. Does your municipality currently have a moratorium in place regarding recreational marijuana dispensaries?

39% yes **61% no**

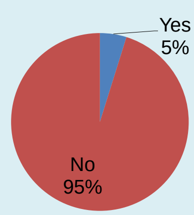
16c. In which retail areas of your municipality do you plan to allow recreational marijuana dispensaries (as per I-502)?

- **65%** not yet determined
- **19%** downtowns, neighborhood centers, highway/ arterial areas
- **16%** other areas*

*A number of write-in responses in the "other" category included industrial or light manufacturing areas.

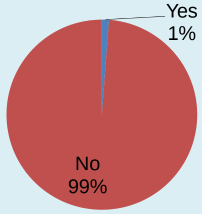
II. Selected preliminary findings: E-commerce

27a. Does your municipality possess research or data about the projected impacts of e-commerce on "brick and mortar" retail?



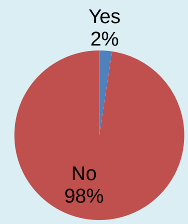
II. Selected preliminary findings: E-commerce

27b. Has your municipality changed the amount of land zoned for retail due to e-commerce?



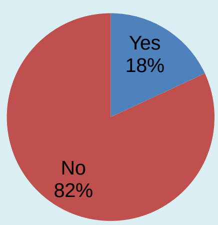
II. Selected preliminary findings: E-commerce

27c. Does your municipality have plans to address significant vacancies, should they result, from a decline in “brick and mortar" retail resulting from e-commerce?



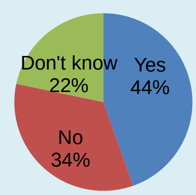
II. Selected preliminary findings: inter-jurisdictional planning

25a. Does your municipality collaborate with neighboring municipalities about the siting and regulation of retail uses?



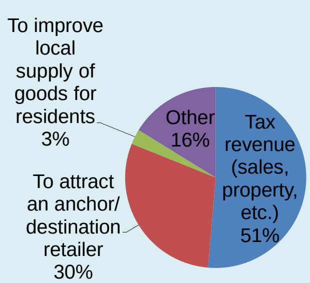
II. Selected preliminary findings: inter-jurisdictional planning

25d. Are you aware of one or more instances when your municipality has competed with another municipality for a retailer?



II. Selected preliminary findings: inter-jurisdictional planning

25f. What was the primary reason for the competition for the retailer(s)?



III. Conclusion

Preliminary thoughts for municipalities:

1. Collect your own data: shopper survey, retail database.
2. Municipalities have stated that their downtowns are important for their “sense of place” – can downtowns become more important for shopping and sales tax revenue as well?
3. Can our state move beyond competition for retail?
4. Concentration issues with adult uses and marijuana (new red light districts)?
5. Plan for e-commerce impacts.

Thank you!

Jennifer Gerend, Ph.D., AICP
gerendj@evergreen.edu

http://blogs.evergreen.edu/gerendj/

Planning for Retail

Considerations and Approaches

Chris Mefford, AICP
President & CEO
community attributes inc

wicked problems SMART SOLUTIONS 2013

October 2, 2013

Contents

Why Retail Matters

- Shopping needs
- Place-making experience
  - Quality of life
  - Talent attraction
  - Neighborhoods
- Fiscal needs
  - Washington State

Retail Planning Analytics

- Long-term needs
  - Need a vision
  - Understand community's place in regional markets and development patterns
  - Plan for role of retail in community
  - Fiscal balance
- Short-term needs
  - Feasibility
  - Market opportunities
  - Differentiate
  - Tactics
  - On-line retail competition

2

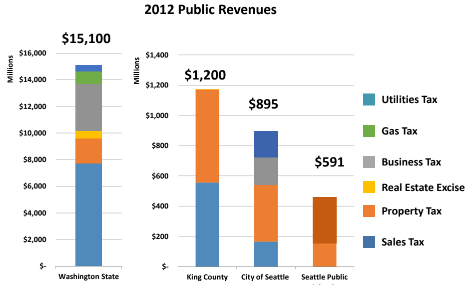
Retail Matters

3

Retail Matters

4

Retail Matters



87% of all State taxes represented

Roughly 80% of all local taxes represented

5

Planning for Retail

Planning for Retail

- Short-term and long-term needs
- Long-term
  - Need a vision
  - Understand community's place in regional markets and development patterns
  - Plan for role of retail in community
  - Fiscal balance
- Short-term
  - Feasibility
  - Market opportunities
  - Differentiate
  - Tactics
  - On-line retail competition

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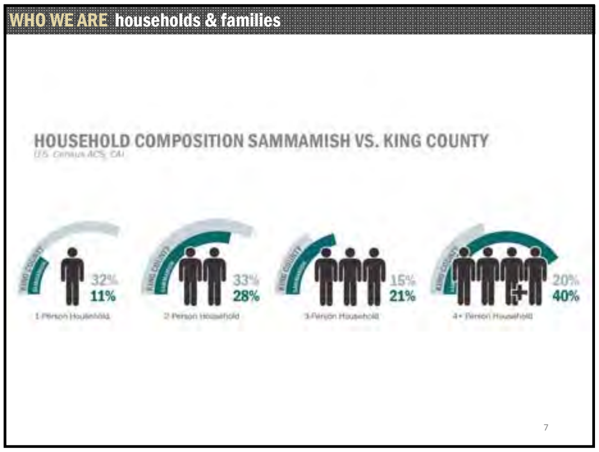
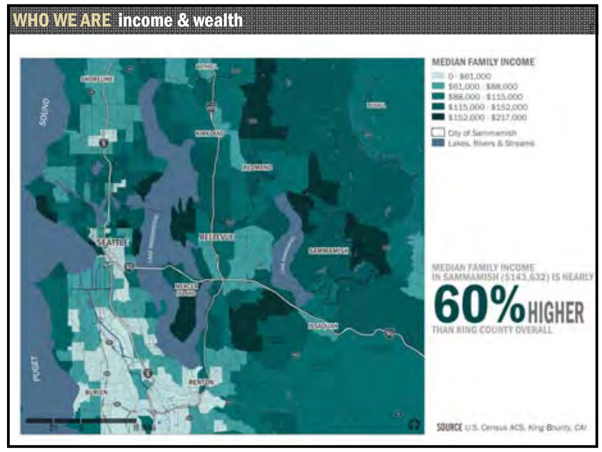
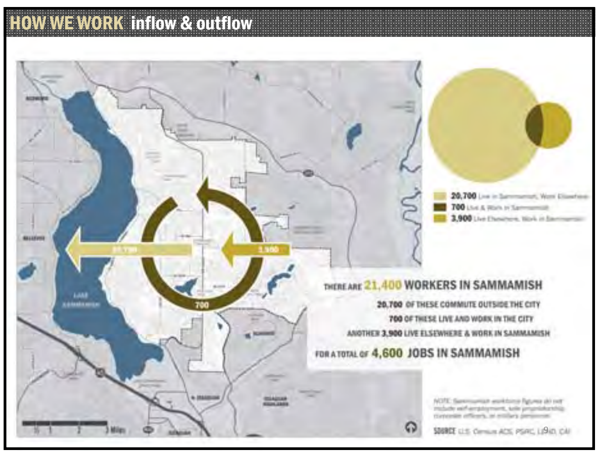
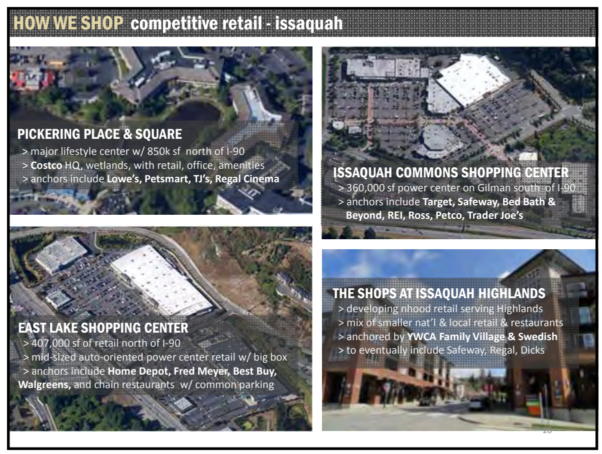
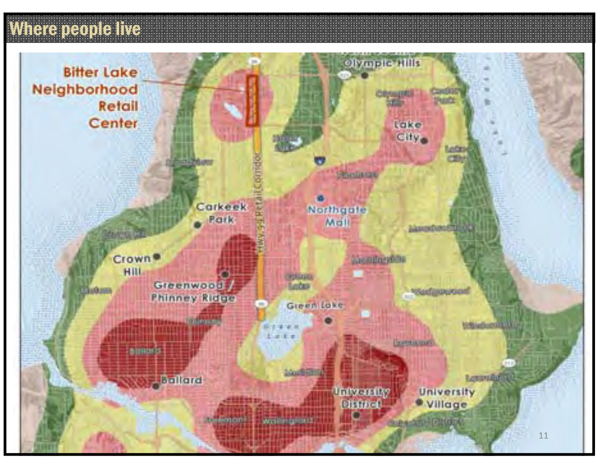
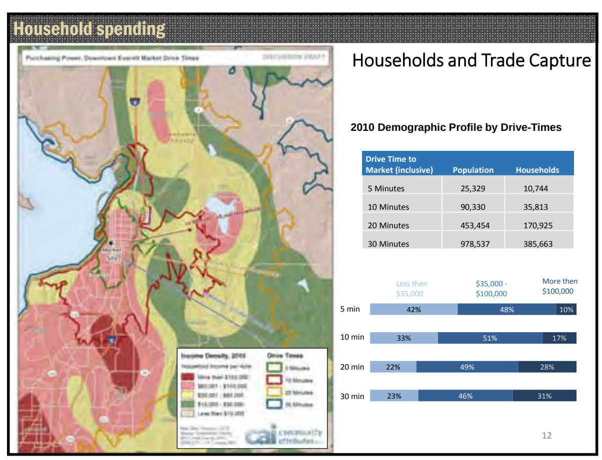

WHO WE ARE households & families
HOUSEHOLD COMPOSITION SAMMAMISH VS. KING COUNTY
U.S. Census ACS, CAI
32%
11%
1 Person Households
33%
28%
2 Person Household
15%
21%
3 Person Household
20%
40%
4+ Person Household
7


WHO WE ARE income & wealth
MEDIAN FAMILY INCOME
0 - $61,000
$61,000 - $88,000
$88,000 - $115,000
$115,000 - $152,000
$152,000 - $217,000
City of Sammamish
Lakes, Rivers & Streams
SEATTLE
BELLEVUE
REDMOND
KIRKLAND
SAMMAMISH
ISSAQUAH
RENTON
MEDIAN FAMILY INCOME IN SAMMAMISH ($143,632) IS NEARLY
60% HIGHER
THAN KING COUNTY OVERALL
SOURCE U.S. Census ACS, King County, CAI

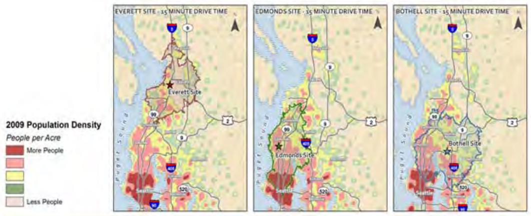

HOW WE WORK inflow & outflow
20,700 Live in Sammamish, Work Elsewhere
700 Live & Work in Sammamish
3,900 Live Elsewhere, Work in Sammamish
20,700
3,900
700
THERE ARE 21,400 WORKERS IN SAMMAMISH
20,700 OF THESE COMMUTE OUTSIDE THE CITY
700 OF THESE LIVE AND WORK IN THE CITY
ANOTHER 3,900 LIVE ELSEWHERE & WORK IN SAMMAMISH
FOR A TOTAL OF 4,600 JOBS IN SAMMAMISH
SOURCE U.S. Census ACS, PSRC, LOND, CAI


HOW WE SHOP competitive retail - issaquah
PICKERING PLACE & SQUARE
> major lifestyle center w/ 850k sf north of I-90
> Costco HQ, wetlands, with retail, office, amenities
> anchors include Lowe's, Petsmart, TJ's, Regal Cinema
ISSAQUAH COMMONS SHOPPING CENTER
> 360,000 sf power center on Gilman south of I-90
> anchors include Target, Safeway, Bed Bath & Beyond, REI, Ross, Petco, Trader Joe's
EAST LAKE SHOPPING CENTER
> 407,000 sf of retail north of I-90
> mid-sized auto-oriented power center retail w/ big box
> anchors include Home Depot, Fred Meyer, Best Buy, Walgreens, and chain restaurants w/ common parking
THE SHOPS AT ISSAQUAH HIGHLANDS
> developing nhood retail serving Highlands
> mix of smaller nat'l & local retail & restaurants
> anchored by YWCA Family Village & Swedish
> to eventually include Safeway, Regal, Dicks
10


Where people live
Bitter Lake Neighborhood Retail Center
Olympic Hills
Lake City
Carkeek Park
Northgate Mall
Crown Hill
Greenwood / Phinney Ridge
Green Lake
Ballard
University District
University Village
11


Household spending
Households and Trade Capture
2010 Demographic Profile by Drive-Times
Drive Time to Market (inclusive) | Population | Households
5 Minutes | 25,329 | 10,744
10 Minutes | 90,330 | 35,813
20 Minutes | 453,454 | 170,925
30 Minutes | 978,537 | 385,663
Less then $35,000
$35,000 - $100,000
More then $100,000
5 min 42% 48% 10%
10 min 33% 51% 17%
20 min 22% 49% 28%
30 min 23% 46% 31%
12

Household spending



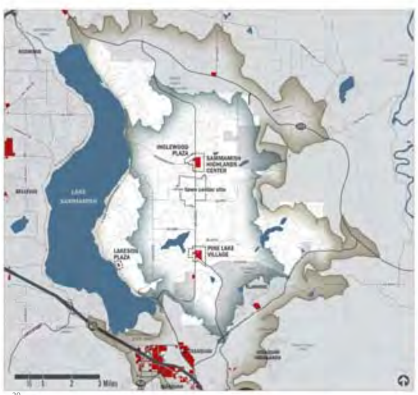
Location	Everett	Southwest Snohomish	Southeast Snohomish
Households within 15 minutes	83,900	220,700	141,300
Total Household Income	$5,998 M	$19,422 M	$19,518 M
Avg. Household Income	$71,000	$88,000	$138,000
Total Spending on Food (Groceries and Eating Out)	$1,032 M	$2,552 M	$2,653 M
Avg. Household Spending on Food	$12,300	$11,600	$18,800

13

Household growth forecasts

14

HOW WE SHOP sammamish retail trade area



- > Redmond has big-box & town centers
- > Issaquah has big-box & lifestyle centers
- > Sammamish has two primary, grocery-anchored shopping centers, and a third center at Lakeside

SAMMAMISH RETAIL TRADE AREA

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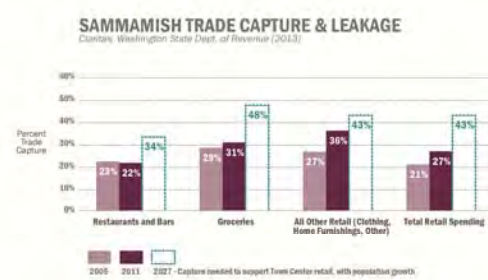
HOW WE SHOP trade capture & leakage



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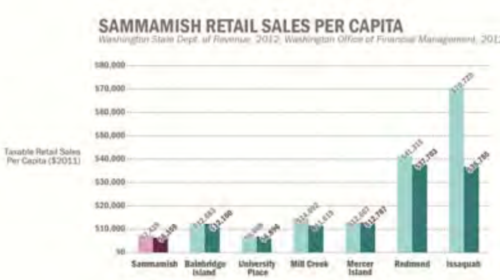
HOW WE SHOP taxable retail sales



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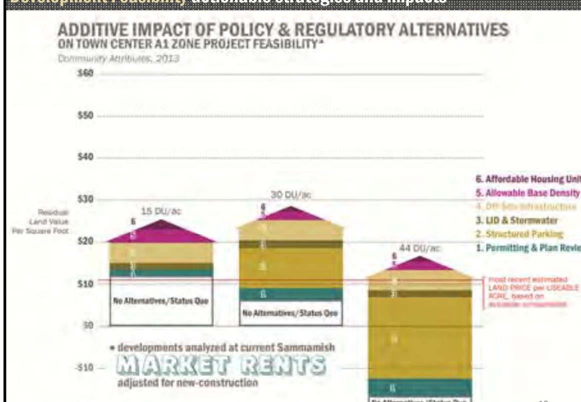
Development Feasibility actionable strategies and impacts



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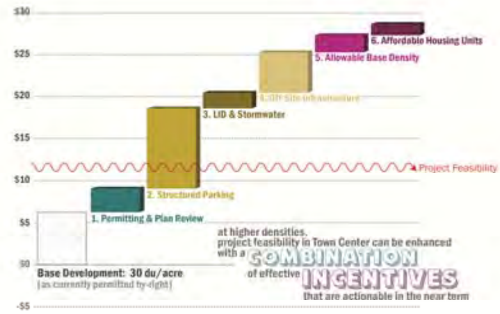
Development Feasibility actionable strategies and impacts

Residual land value per s.f.



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