



# Dealing with the Big Box

**City of Columbus Retail Working Group**

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# Columbus





# Columbus





# Columbus





# Columbus





# Columbus





# Columbus





# Hudson, OH





# Chicago, IL





# University Heights, OH





# Ventura, CA





# Madison, MS





# Madison, MS





# Trends in Big Box Retail

- How to find information about big box retail?
  - *RetailTraffic* (<http://retailtrafficmag.com>).
  - *Shopping Centers Today* (<http://www.icsc.org>).
  - Securities Exchange Commission (<http://www.sec.gov/edgar>)
  - Retailer websites (<http://www.walmartrealty.com/>)





# Top 10 Trends in Big Box Retail

1. Big Boxes Get Bigger

2. Big Boxes Get Smaller

3. Power Towns

4. Shopping Malls

5. Urban Stores

6. Alternative Designs

7. Mixed Use

8. Green Design

9. Side-by-Side Stores

10. Drive-thru Big Box

11. Fuel Stations



# Big Boxes Get Bigger

- Supercenter Concept
  - Wal-Mart Supercenter (1,713 stores)
  - SuperTarget (141 stores)
  - Big Kmart (58 stores)





# Big Boxes Get Smaller



- Wal-Mart Neighborhood Market (85 stores)





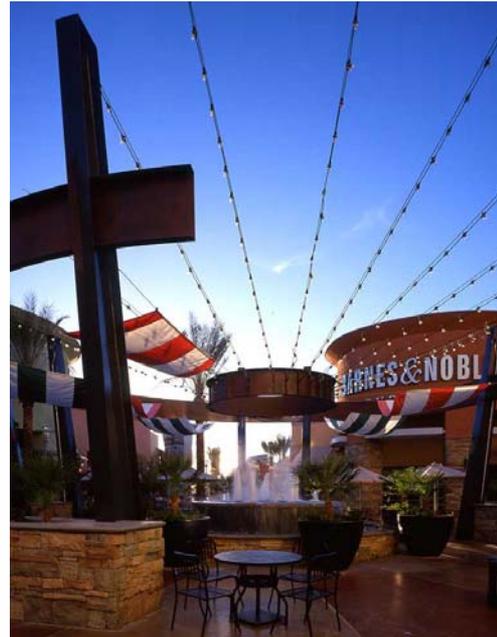
# Power Towns





# Power Towns

- 600,000 or more square feet
- 80 + acres
- 3 or more big boxes
- Entertainment component
- Community amenities





# Shopping Mall

- Big Box Retailers are seen as good anchors for shopping malls.
  - Costco
  - Target
  - Wal-Mart





# Mixed Use





# Urban Stores



Minneapolis, Minnesota



Chicago, Illinois



University Heights, Ohio





# Alternative Designs

- Cities are using design standards and design review to encourage alternative designs
- Wal-Mart has developed several new design templates including:
  - Main Street
  - Cape Cod
  - Adirondack
  - Urban Industrial
  - Art Deco
  - Mediterranean





# Green Design

- “We see it as a next step in evaluating the impact we leave on the environment as we look toward smart growth and sustainability in the building of our new stores.” Mike Duke CEO Wal-Mart Stores-USA





# Side by Side Stores

- Effort to get around square footage caps
- Wal-Mart and Home Depot have drawn up plans for side-by-side stores
- Proposed in Maryland and Idaho



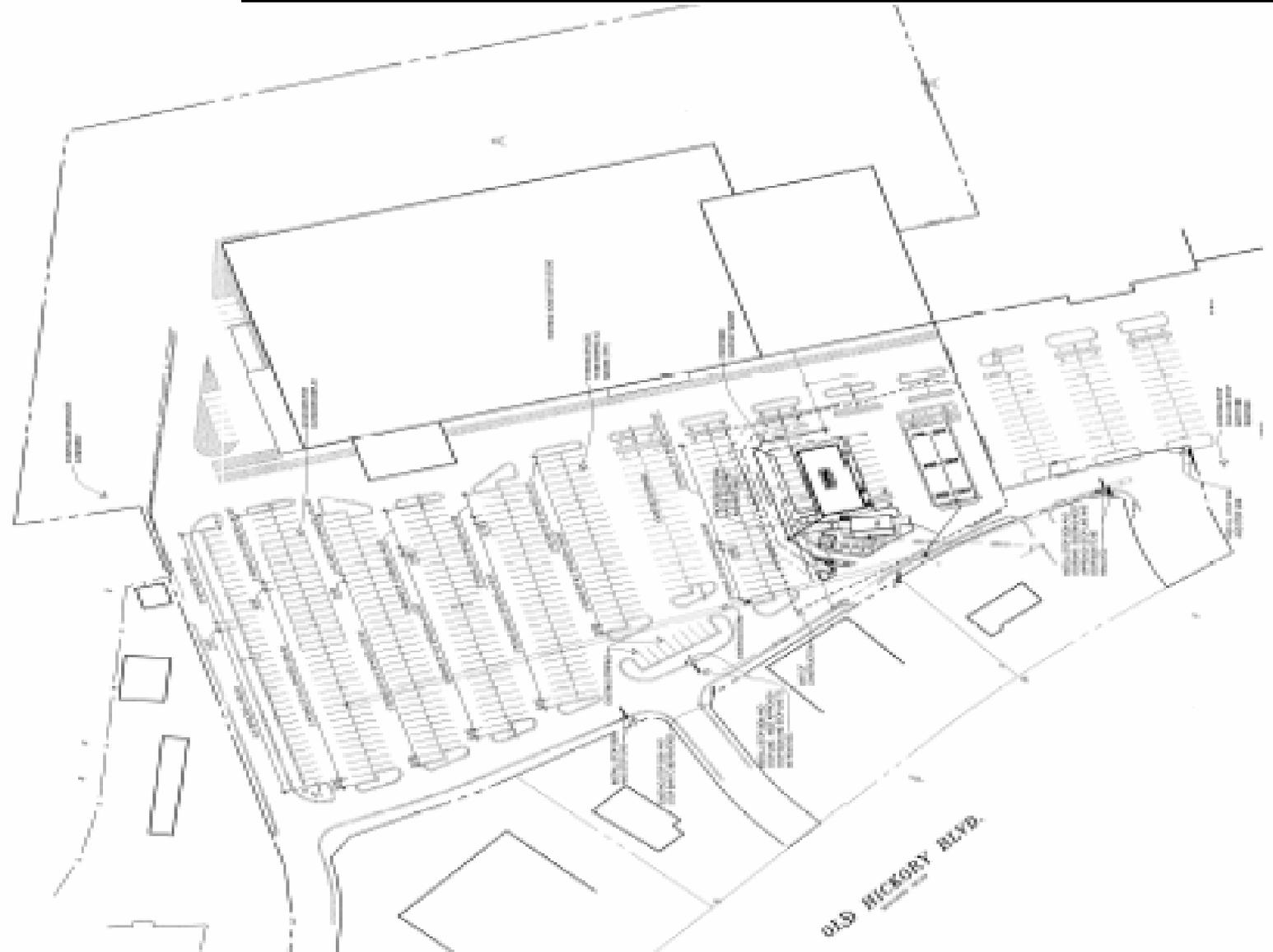


# Drive Thru Big Box





# Fuel Stations





# Research Method





# Tools Uses

	Cities Using Tool
Design Review	23%
Design Standards	17%
Square Footage Limitation	13%
Community Impact Assessment	17%
Conditional Use Permit	14%
Eco Devo Incentives	7%
Moratorium	6%
Grocery Limitation	5%
Demolition Bond	1%



# Design Standards

- Specific design standards
  - Architecture
  - Landscaping
  - Signage
  - Outdoor Storage
  - Community features
  - Parking





# Parking Standards

- Big Boxes Provide for Peak Parking
- Maximum Parking Standards
- Overflow Parking
  - Reinforced Turf





# Square Footage Limitation

- District or City-wide
- 7,500 to 100,000 square feet
- Grocery Limitation





# Community Impact Assessment

- Traffic, Stormwater, and Economic Impact
- Several California cities are requiring economic impact assessments that examine:
  - Trade area
  - Effective buying power
  - Job creation
  - Estimated wages
  - Estimated tax revenue (including estimates of shifted revenue from similar retailers)
  - Restrictions on subsequent use of the property



# Wage and Benefit Standards

- NYC mandates minimum benefits
- Maryland has similar requirement
- Other cities considering standards





# Green Design Requirements

- Austin, Texas mandates green design in downtown area
- Austin, Texas has proposed incentives for green design for big box retail in commercial corridors





# Economic Development Incentives

- Land Acquisition
- Sales Tax Rebate
- Development Fee Waiver
- Tax Increment Financing







# Regional Approaches

- Tax Sharing between jurisdictions:  
California Proposition 11
- Regional Planning:  
Several states considered regional review of big box retail





# Demolition Bonds



- Wauwatosa, WI requires a \$0.20 per square foot fee
- Forsyth County, GA requires a demolition bond for 110% of the cost of demolishing the building





# The End

- Questions?
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