

SUBURBAN REMIX

CREATING THE NEXT GENERATION OF URBAN PLACES

South Florida REIS November 28, 2017



David Dixon FAIA
Stantec's Urban Places

“North America is a
suburban continent with
an *urban population*”

From the Civil War to the Great Reset: a very brief history



New Rochelle, NY



Panama Park, FL



2153

LAUGH
LOVE

Kenwood, FL



No. 1



No. 2



Announcing

*The 1956
Jubilee*

Price \$11,600



No. 3



No. 4

Levittown, New York



??, FL



Skye Isle, FL

FORECLOSURE

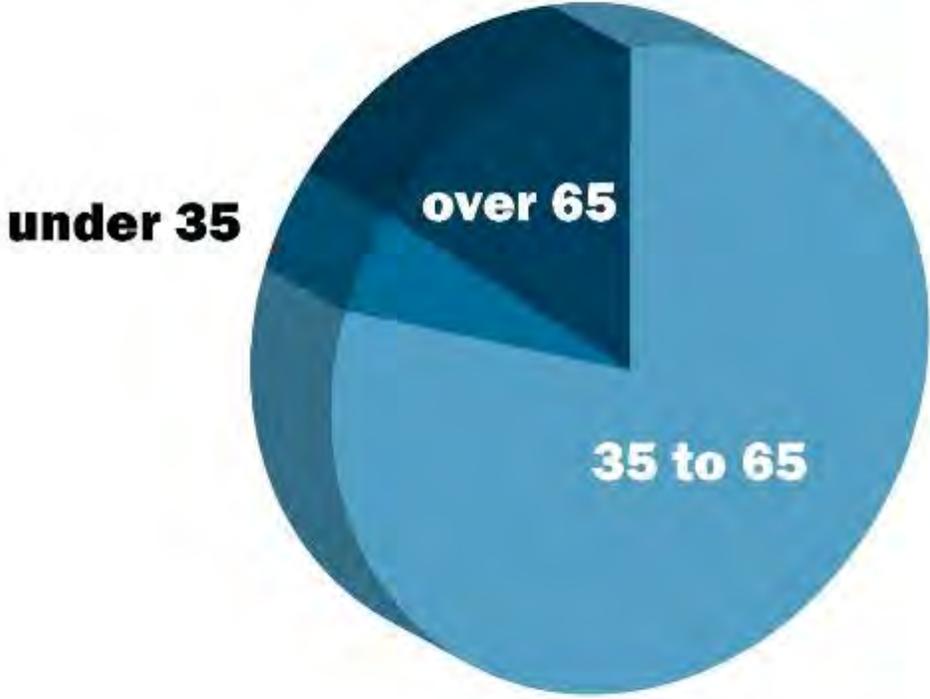
**HOME
FOR
SALE**

The Villages, FL

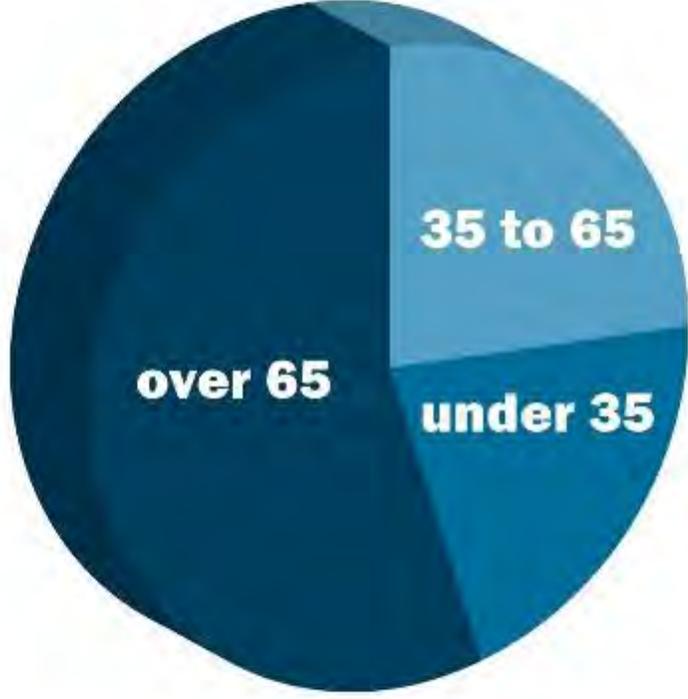


New Rochelle, NY

Demographics are destiny: the present future The Great Reset to the mid-2030s (and later...)

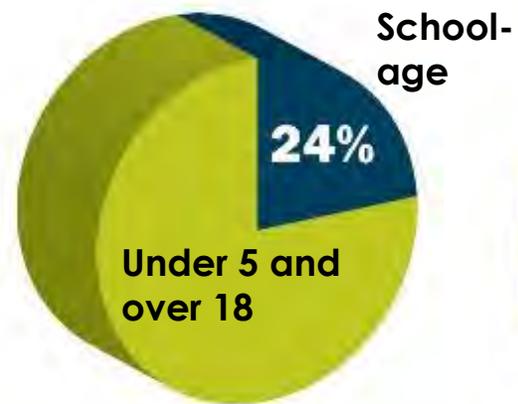


1990-2010

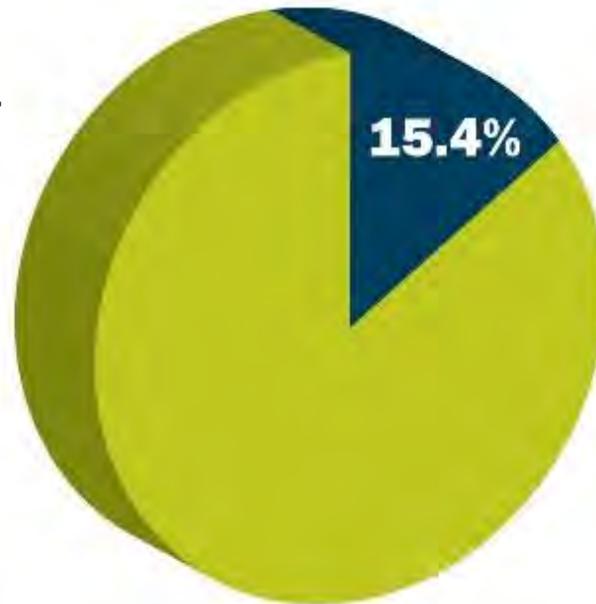


2010-2030

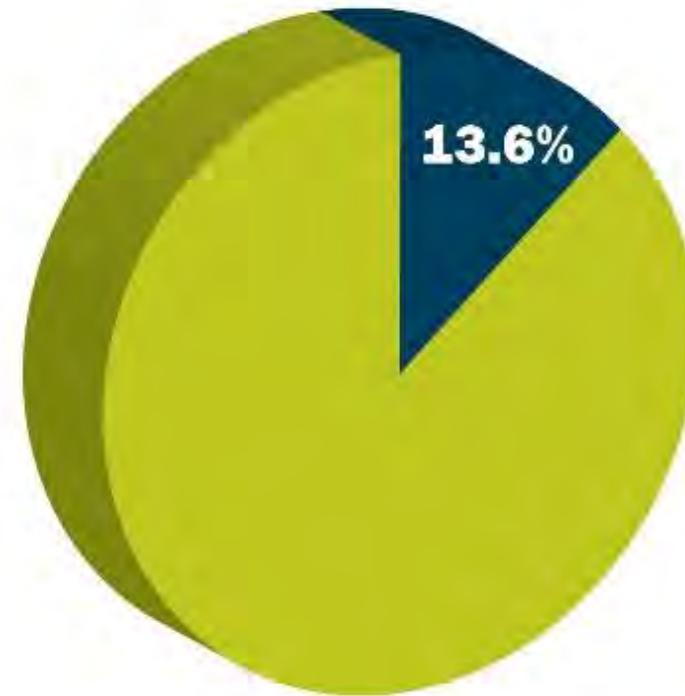
Population growth by age group: US population is growing older and younger



1970
TOTAL: 203 MILLION



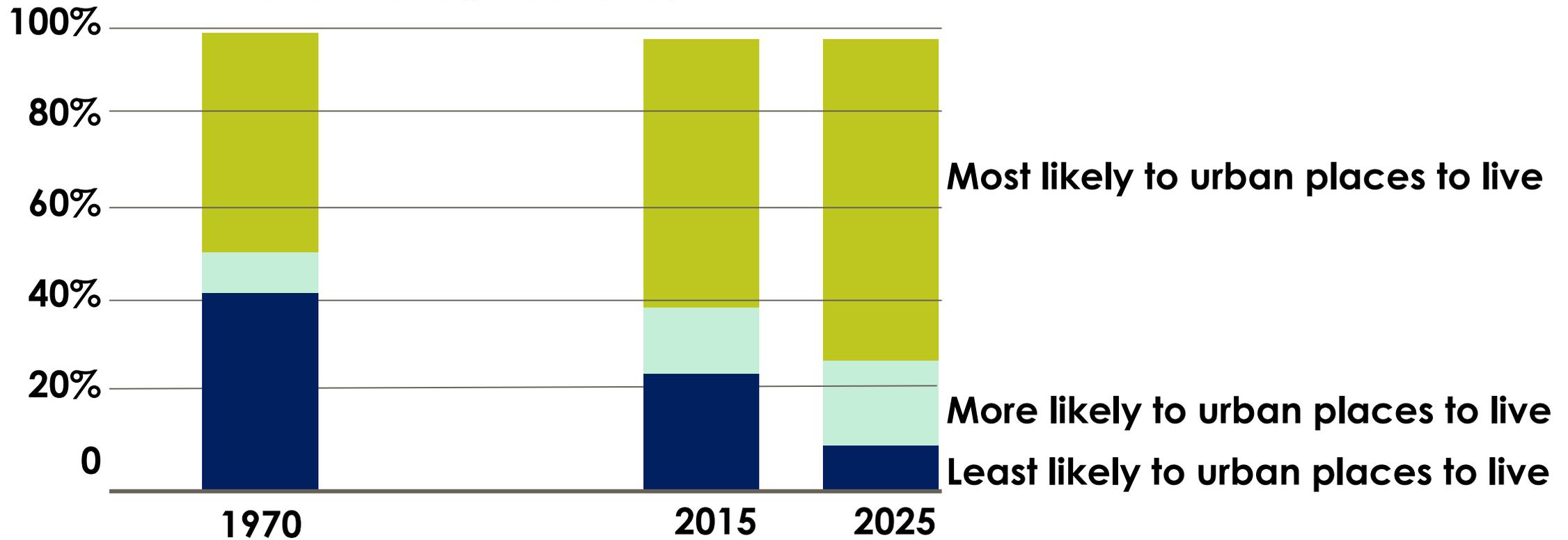
2015
TOTAL: 321 MILLION



2030 (PROJECTED)
TOTAL: 373 MILLION

Total population by age group: between 1970 and 2030 the US will add 170 million people... including 2 million school-age kids

Share of all households



From 1970 to 1990 the primary market for living in “urban” places will increase from roughly 50% to 90% of the US population



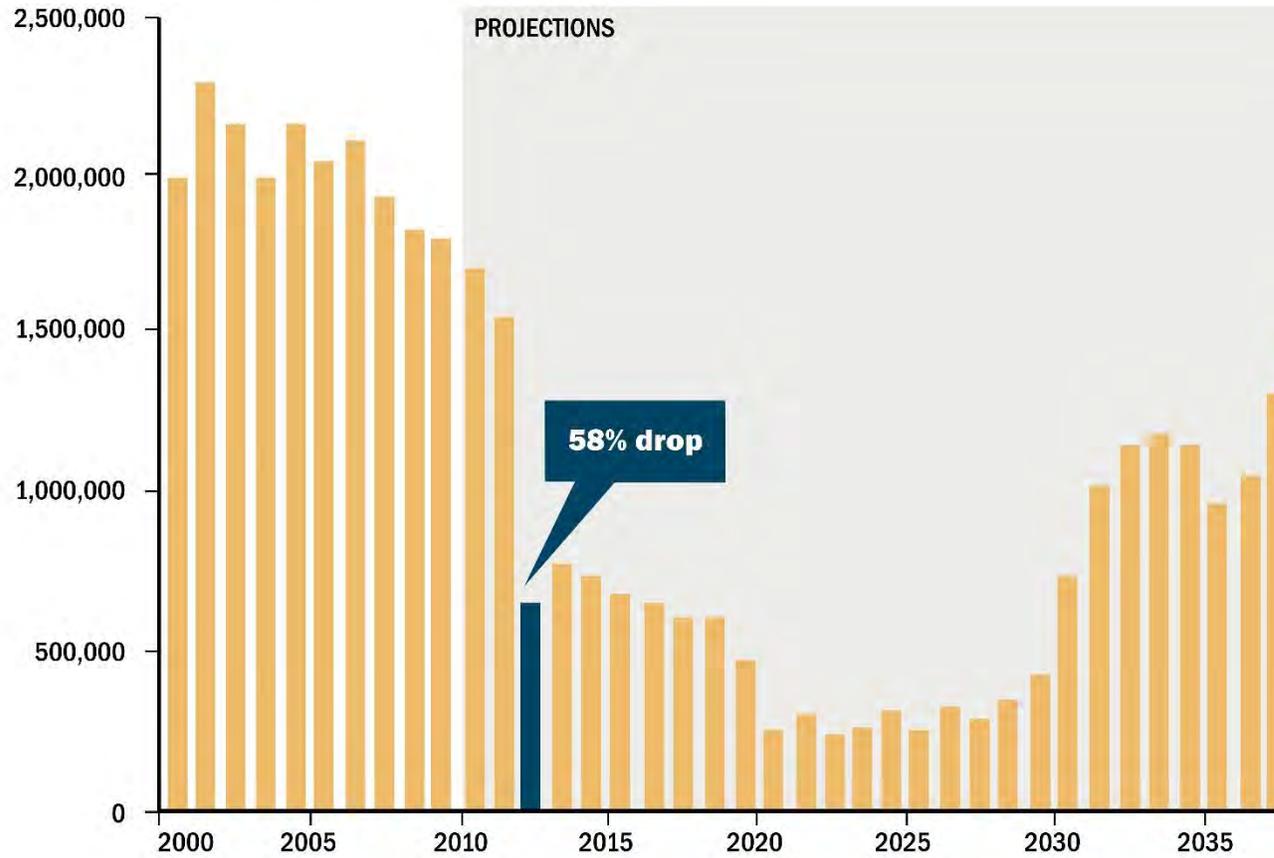
OF U.S. HOUSEHOLD STOCK
IS **SINGLE FAMILY**



OF U.S. HOUSEHOLDS
ARE **MARRIED COUPLES
WITH CHILDREN**

There is a dramatic mismatch between the US
housing stock and the US population

A growing shortage of skilled labor is accelerating competition for knowledge workers



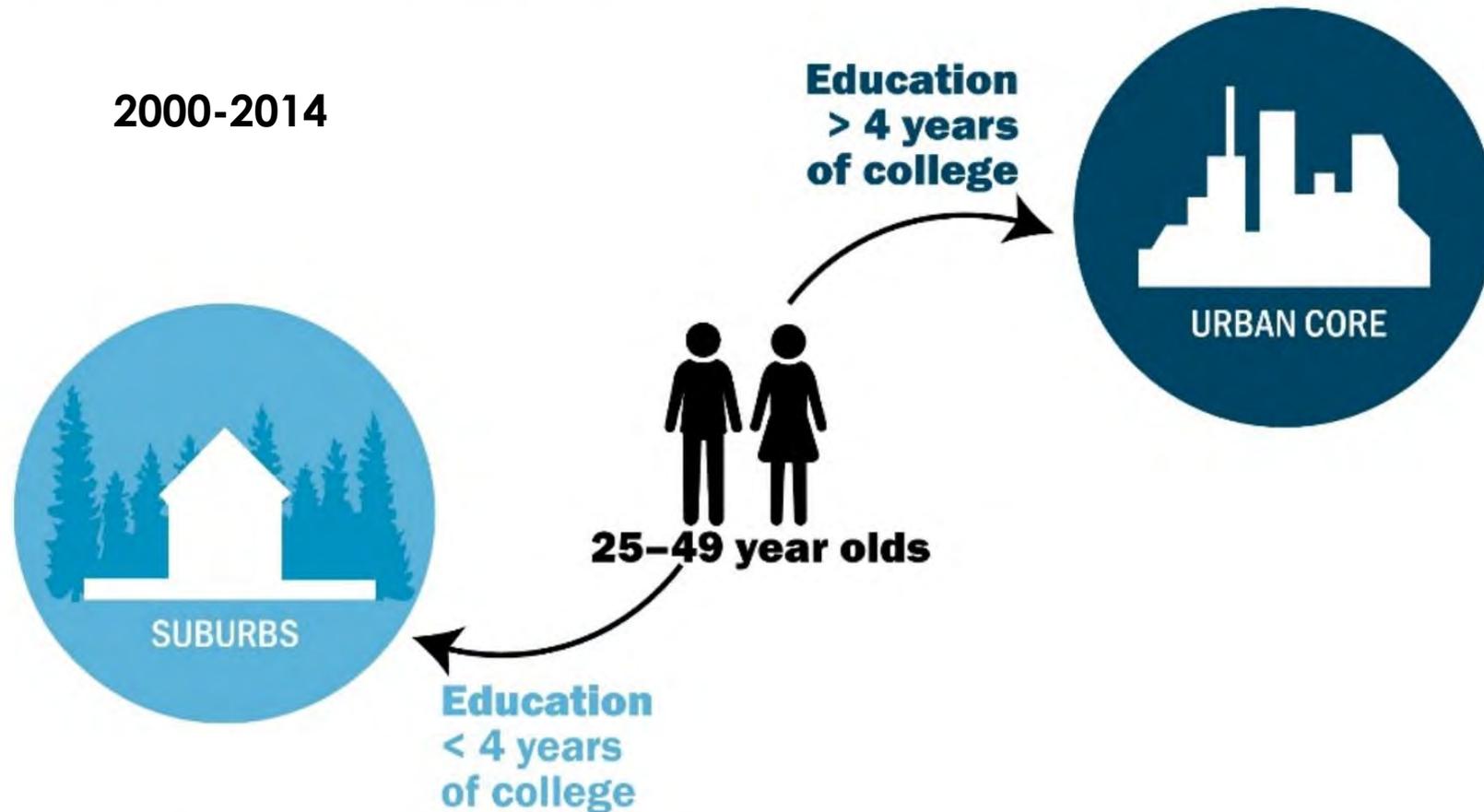
Annual growth in the US workforce: an aging workforce is not being replenished

Projected 2020 labor demand and supply by skill level,¹
millions of workers

Share of total
% of demand (for shortages),
% of supply (for surpluses)

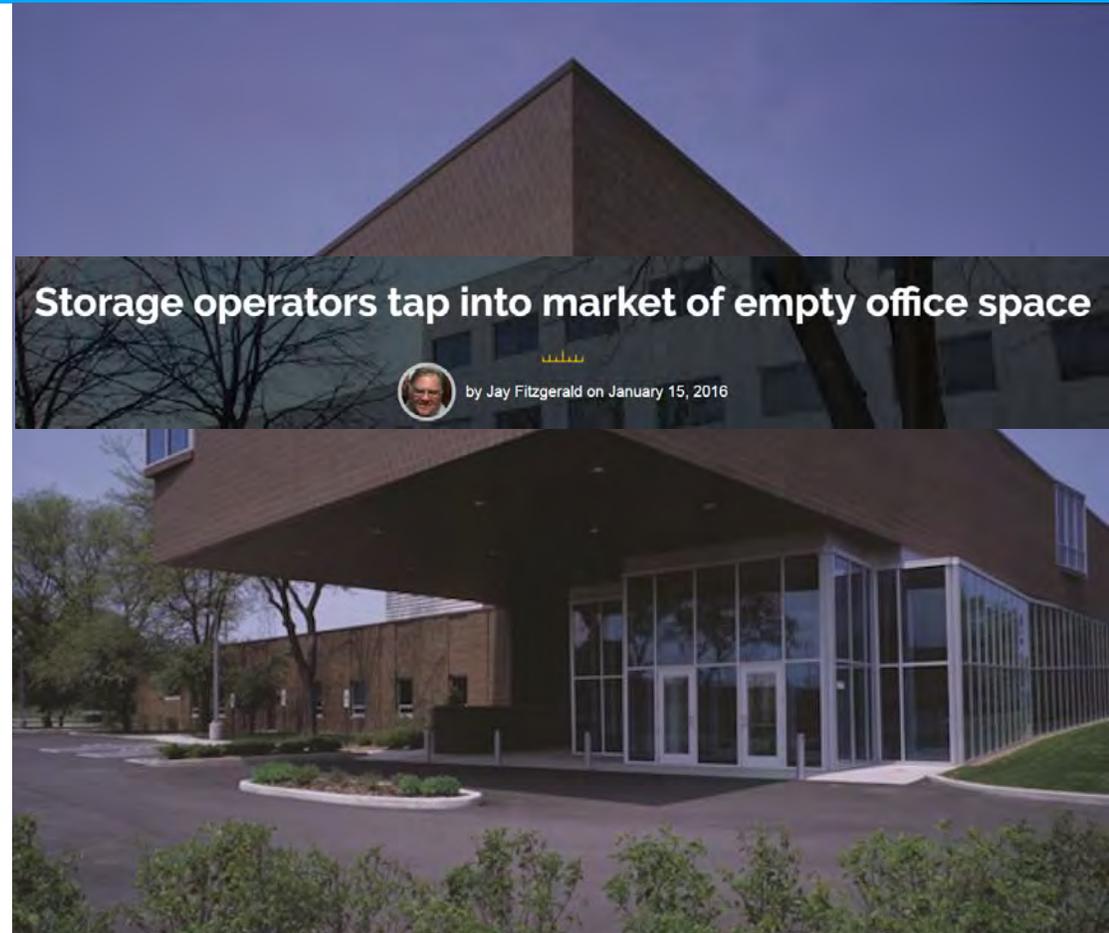
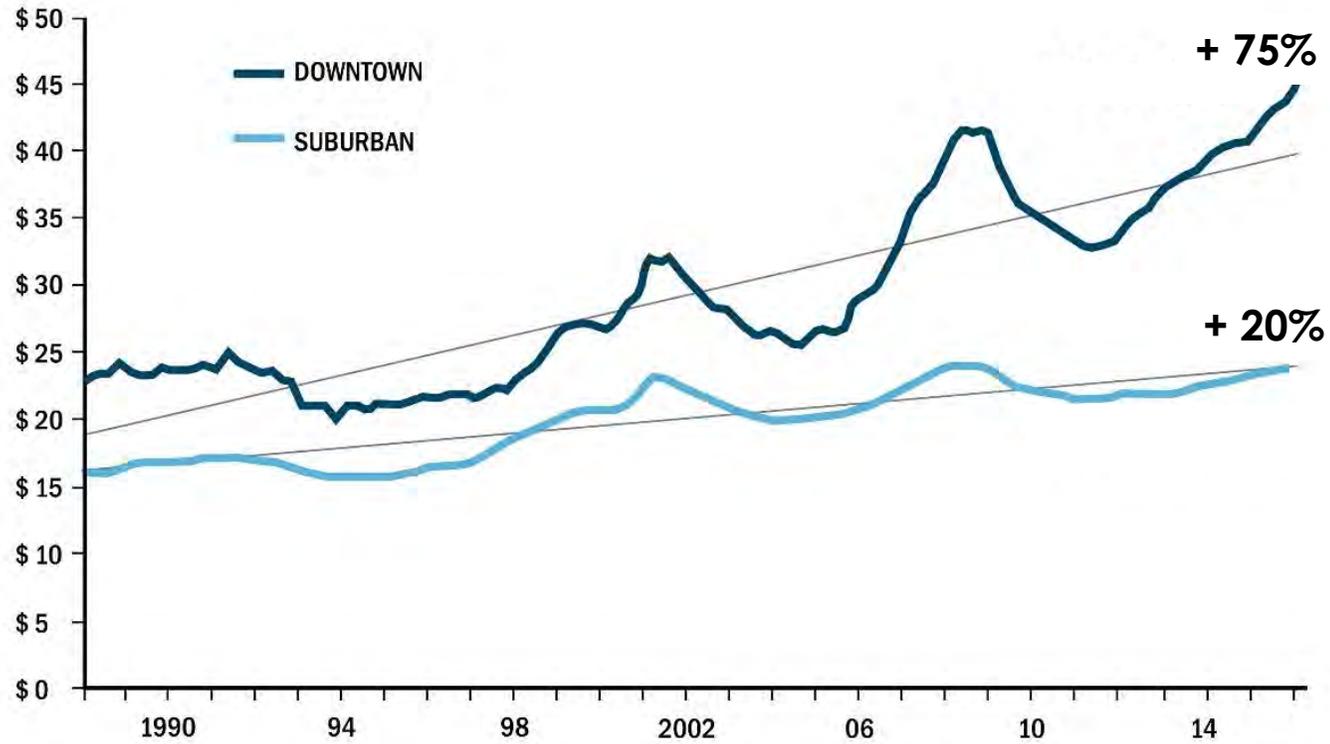


A growing shortage of high skill (knowledge) workers is forcing knowledge industry employers to follow their work force



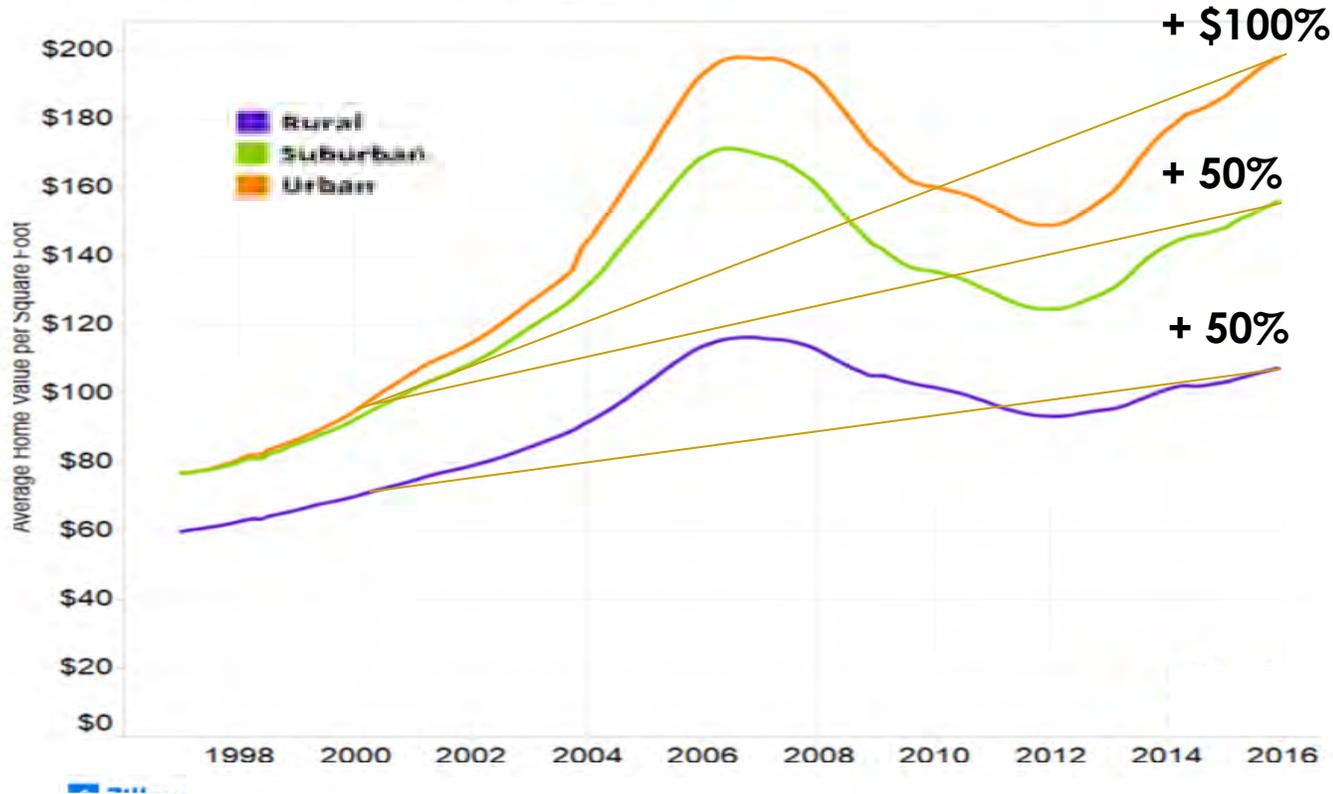
Knowledge workers are heading to cities: 2000 and 2014 25-49 year old's with four or more years of college increased in urban cores, the number with less than four years decreased

Office Rents, 2000-2016 (\$s per square foot)

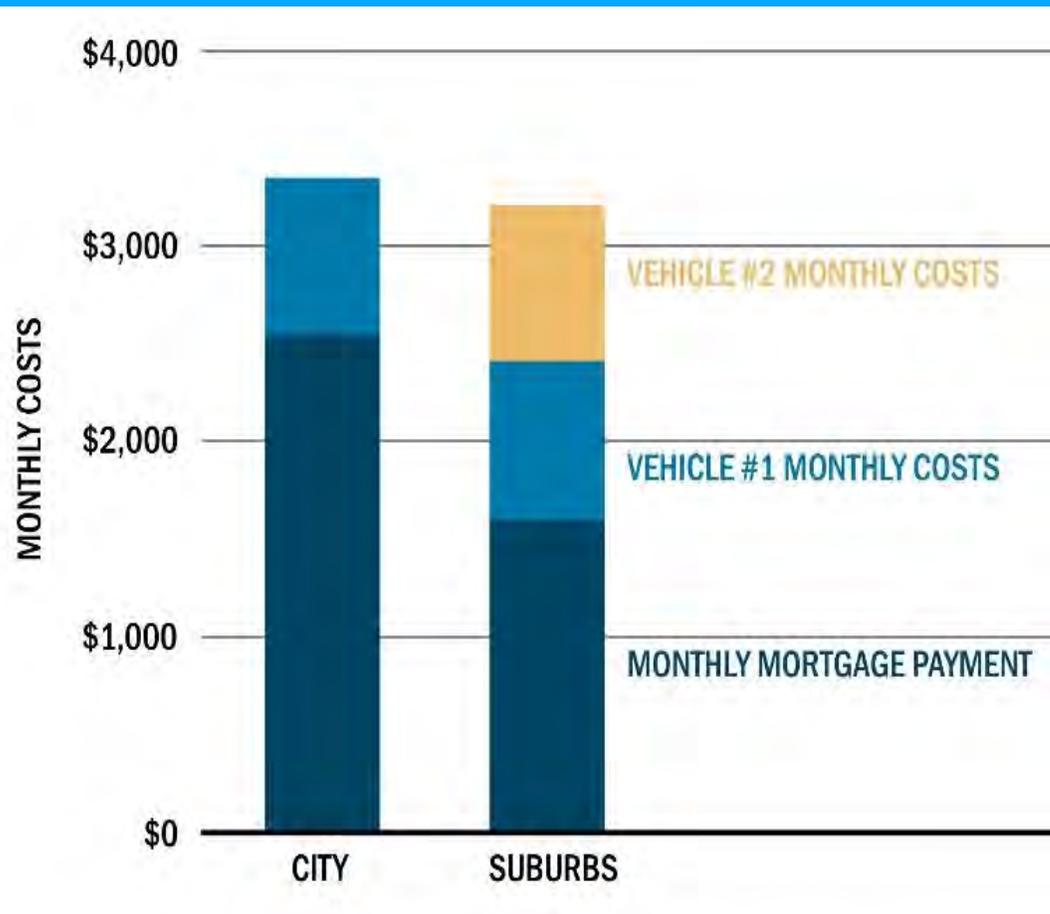


Since 2000 office rents in downtowns have risen more than three times as fast as in the suburbs

Housing Values, 2000-2016 (\$s per square foot)



Since 2000 urban housing values have twice as fast as suburban (and rural...) values



Lehigh Acres, FL

The costs of owning and operating cars consume most of the cost savings associated with less expensive suburban housing

The private automobile is no longer shaping lifestyles for growing numbers of Americans

41%



SMART PHONE

27%



COMPUTER/
TABLET

24%



CAR

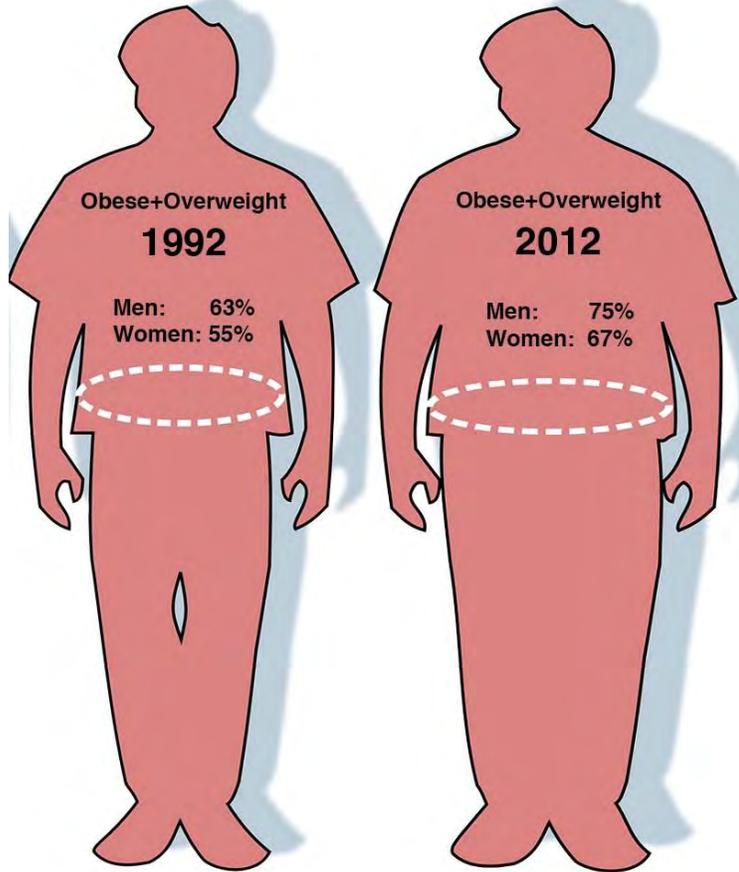
7%



TELEVISION



When Gallup asked Millennials what they would miss most smart phones and computer/tablets far outnumbered cars



Americans are increasingly aware of the health benefits of walkable, urban environments (increasingly important as jobs become more sedentary)

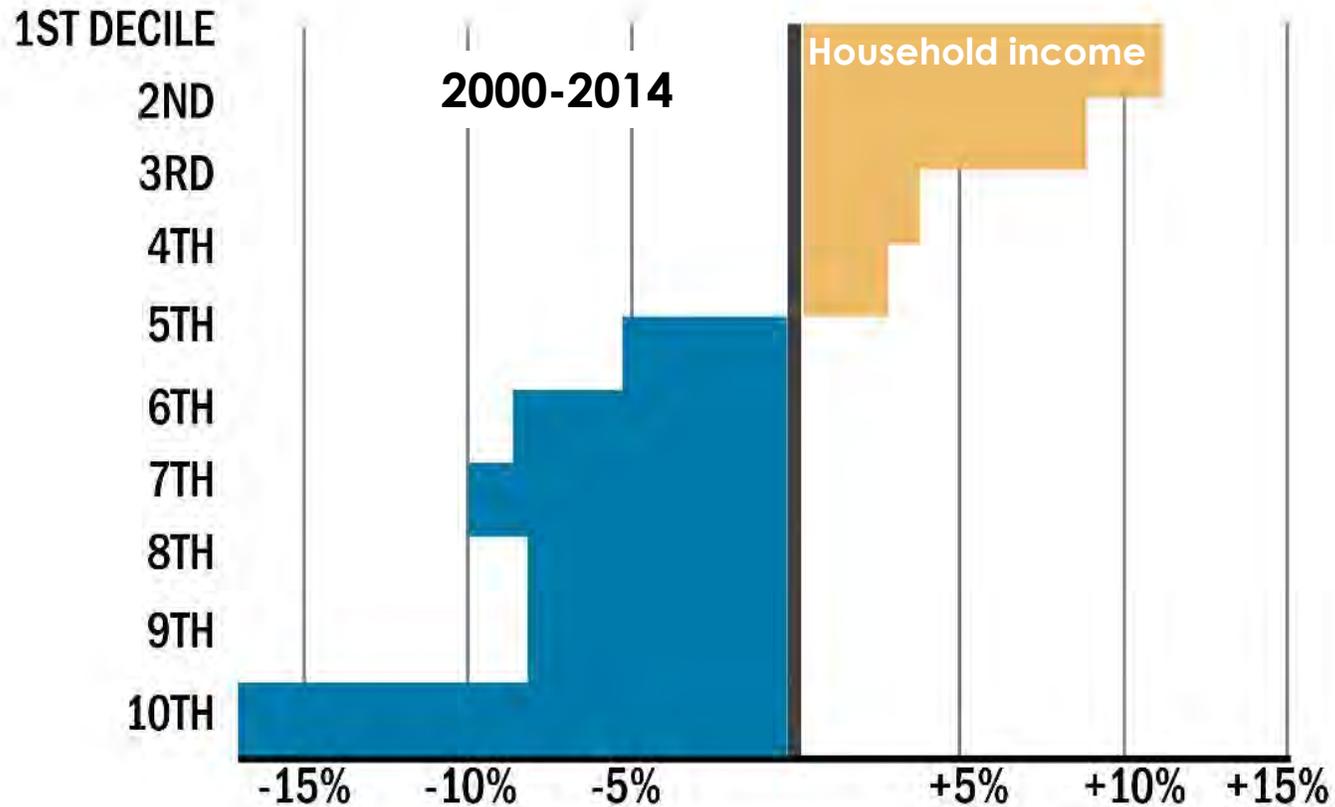


Changing advertisements and popular culture reflect growing diversity—
ad for Aunt Jemima Waffle Mix, 1960

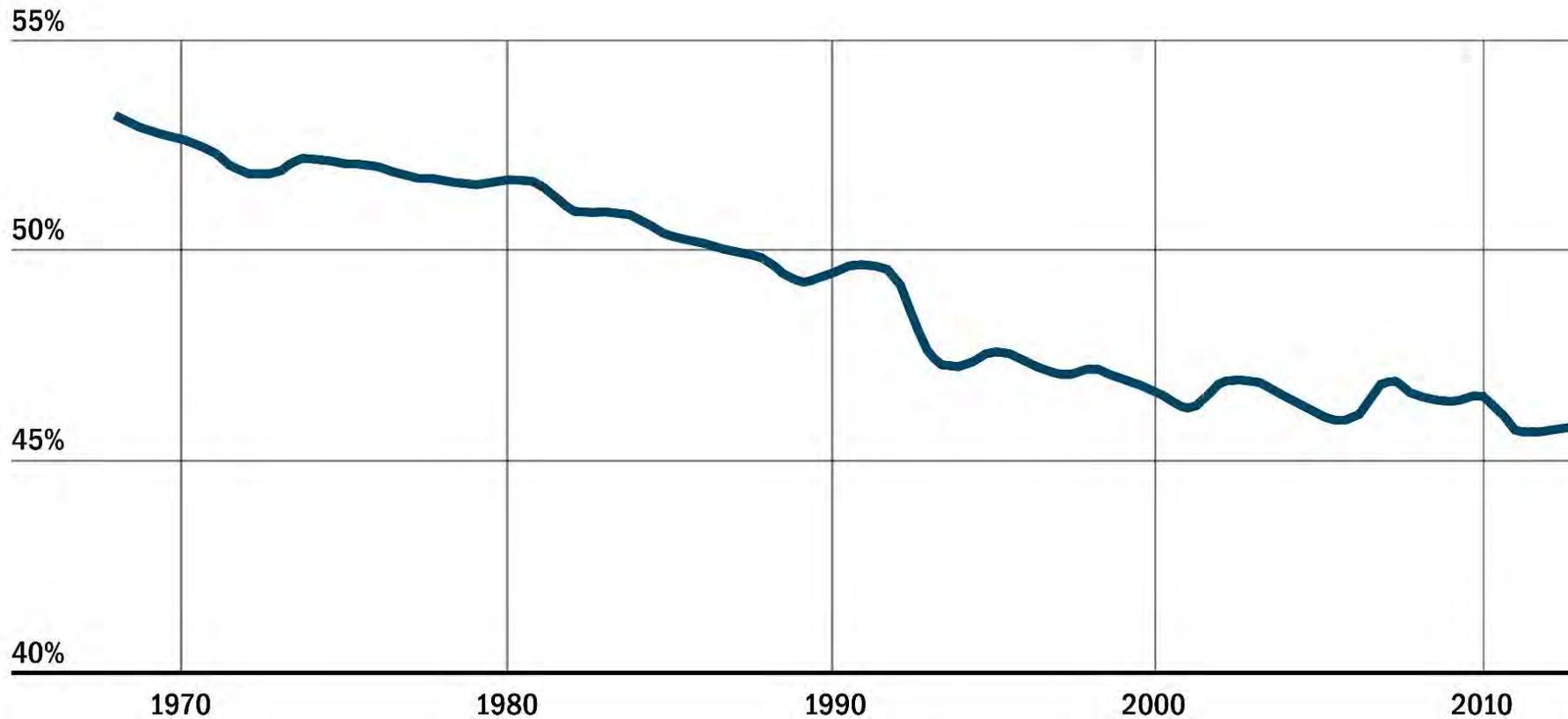


**Changing advertisements and popular culture
reflect growing diversity— ad for Ikea furniture, 2016**

Higher income households are moving into urban centers



Between 2000 and 2014 higher income households moved into urban cores, less affluent households moved out



Not only are more affluent households heading to cities, but the share of US income claimed by middle-class households is shrinking

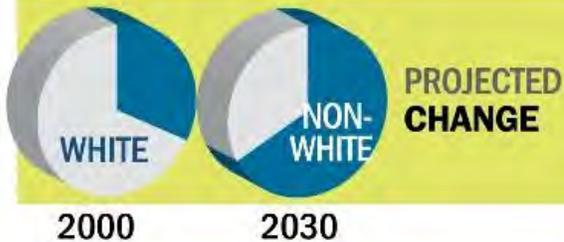
Suburbs are experiencing dramatic changes...

Fairfax county

55% MORE RESIDENTS LIVING IN POVERTY 2008–2016

33% OF NEW RESIDENTS 2000–2016 WERE AGE 65 OR OVER

95% OF NEW RESIDENTS 2000–2016 WERE PEOPLE OF COLOR

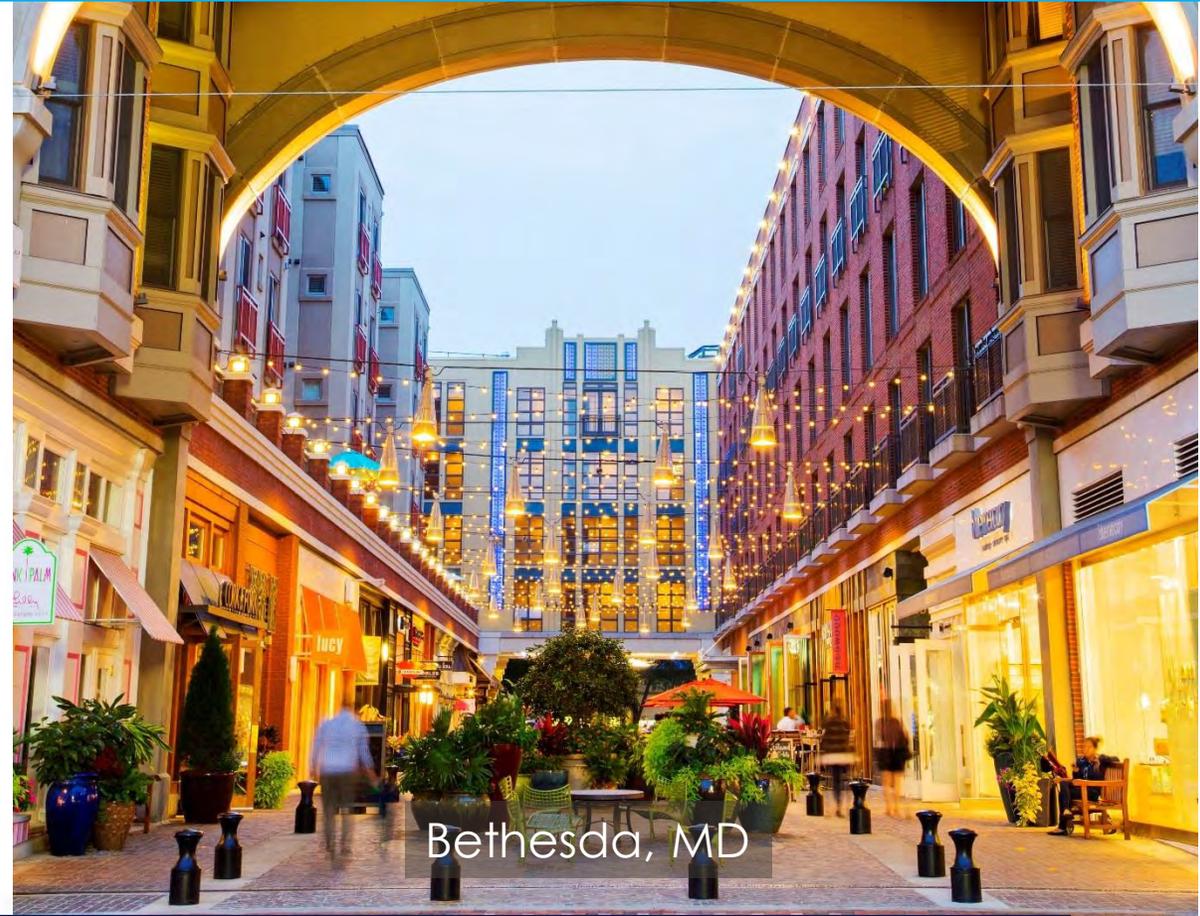
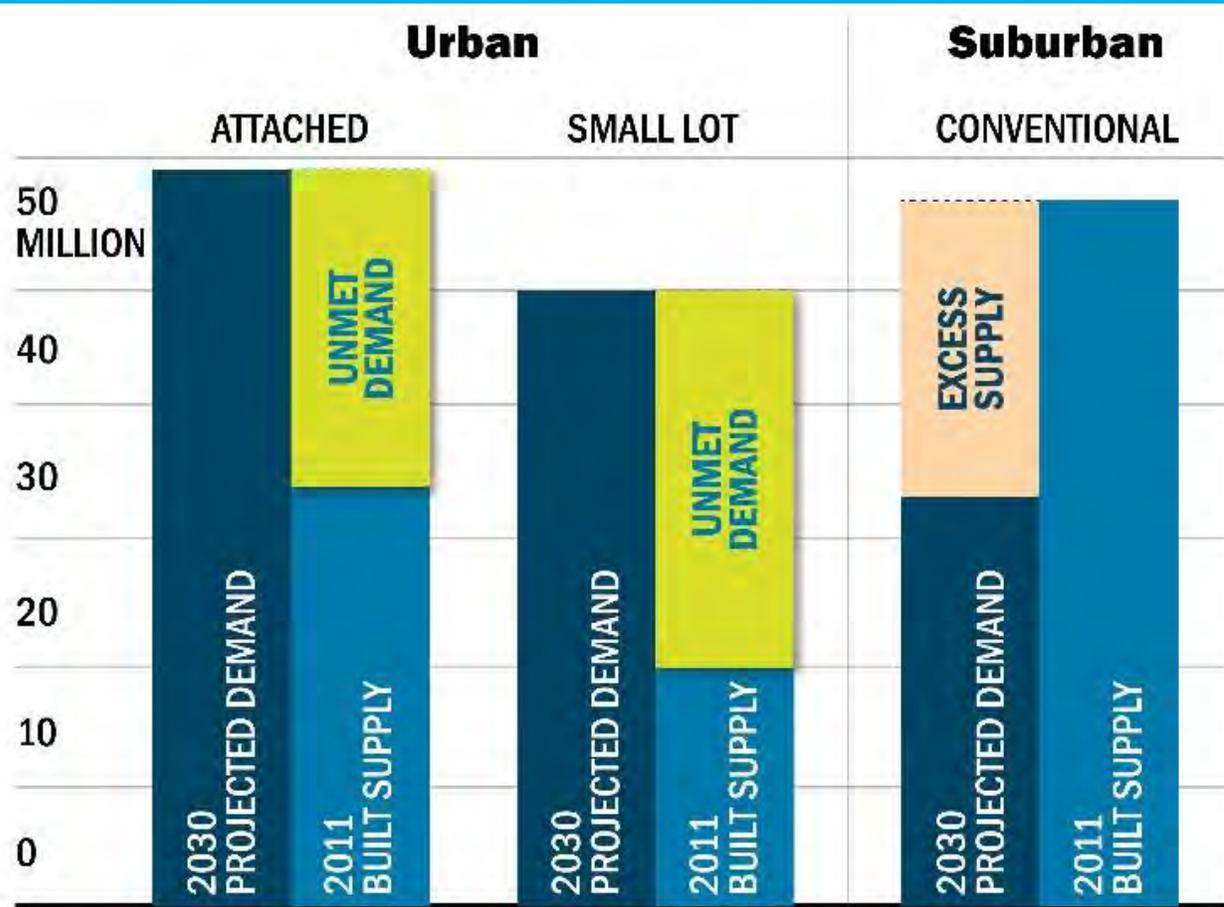


Lehigh Acres, FL

Across the US suburbs are growing poorer, older, and more diverse

The **Opportunity**: the next generation of urban places

The “urban dividend” is potentially more valuable to suburbs than to core cities



Between 2011 and 2030 the US will need to create more than 50 million “urban” housing units—representing an inflow of \$10 to 15 trillion into urban places—many of them in suburbs

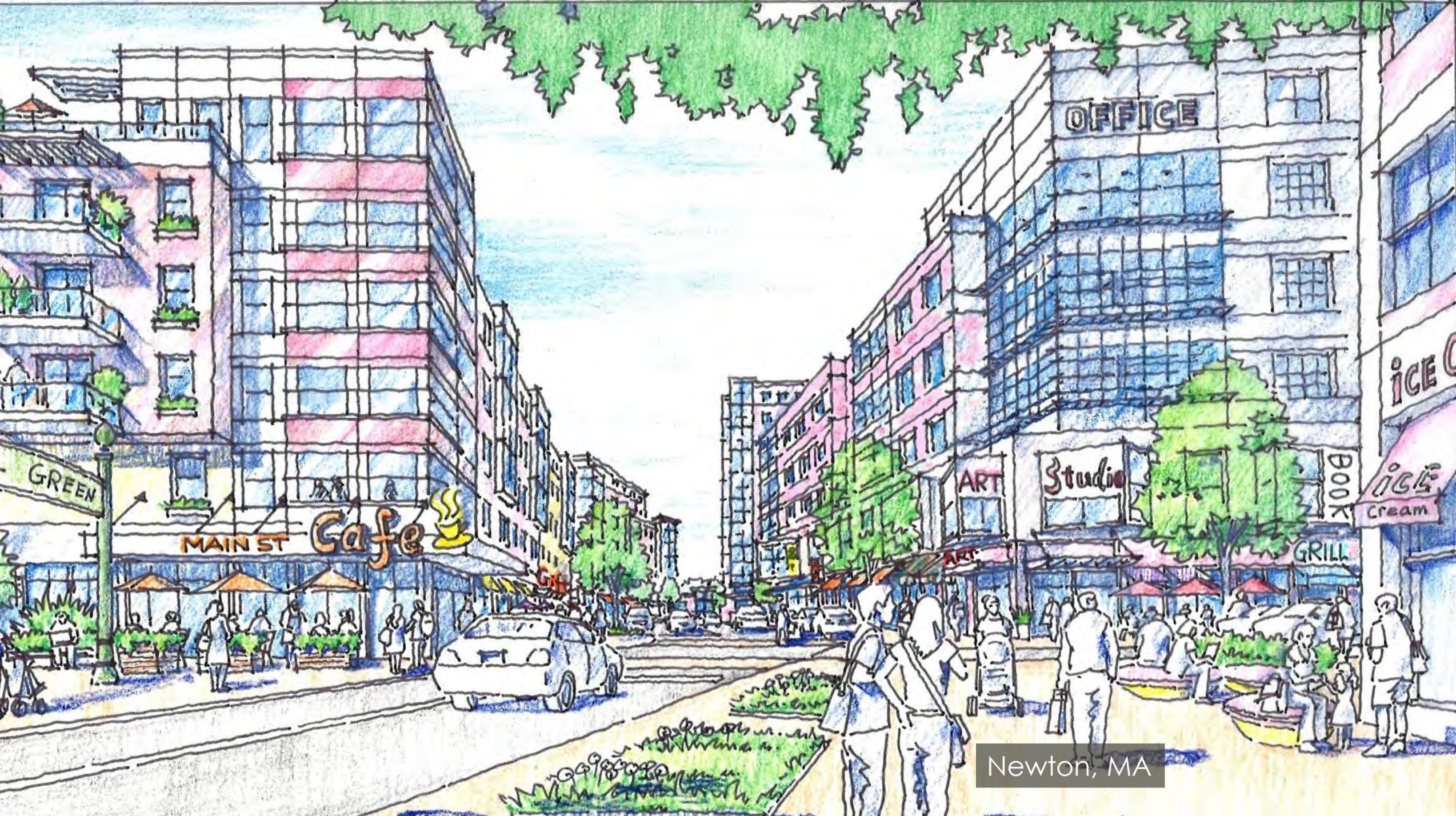




Metropica, Sunrise, FL



Newton, MA



Newton, MA



TrueSight

Roanoke, VA



Roanoke, VA



Tampa, FL



Tampa, FL

2017

BUILDING BLOCKS: process, thresholds, and principles

Process for creating walkable urban places: Leadership



Sandy Springs, GA

Mayor Eva Galambos led her conservative, affluent community to create a de novo downtown

A Georgia Town Takes the People's Business Private



Sandy Springs, GA

SANDY SPRINGS CITY CENTER



Sandy Springs, GA

Process for creating walkable urban places: **Inclusive community engagement**



Dublin, OH

Dublin Ohio's City Manager and Council launched a year-long community-based visioning process centered around an intensive series of workshops, lectures, and charrettes



Dublin, OH

The rapid growth of high-wage knowledge industries funded a very high level of services—like the Dublin Recreation Center—and helped support one of Ohio’s top housing markets.

BEST SUBURBS in AMERICA



Top 10 Cities for **FEMALE** ENTREPRENEURS

10. MONTEREY, CA
9. PEACHTREE CITY, GA
8. NOVATO, CA
7. ROCKVILLE, MD
6. HOUSTON, TX
5. ANNAPOLIS, MD
4. WALNUT CREEK, CA
3. BATON ROUGE, LA
2. DUBLIN, OH
1. ALPHARETTA, GA

Dublin ranks among America's Top 20 Creative Class Cities

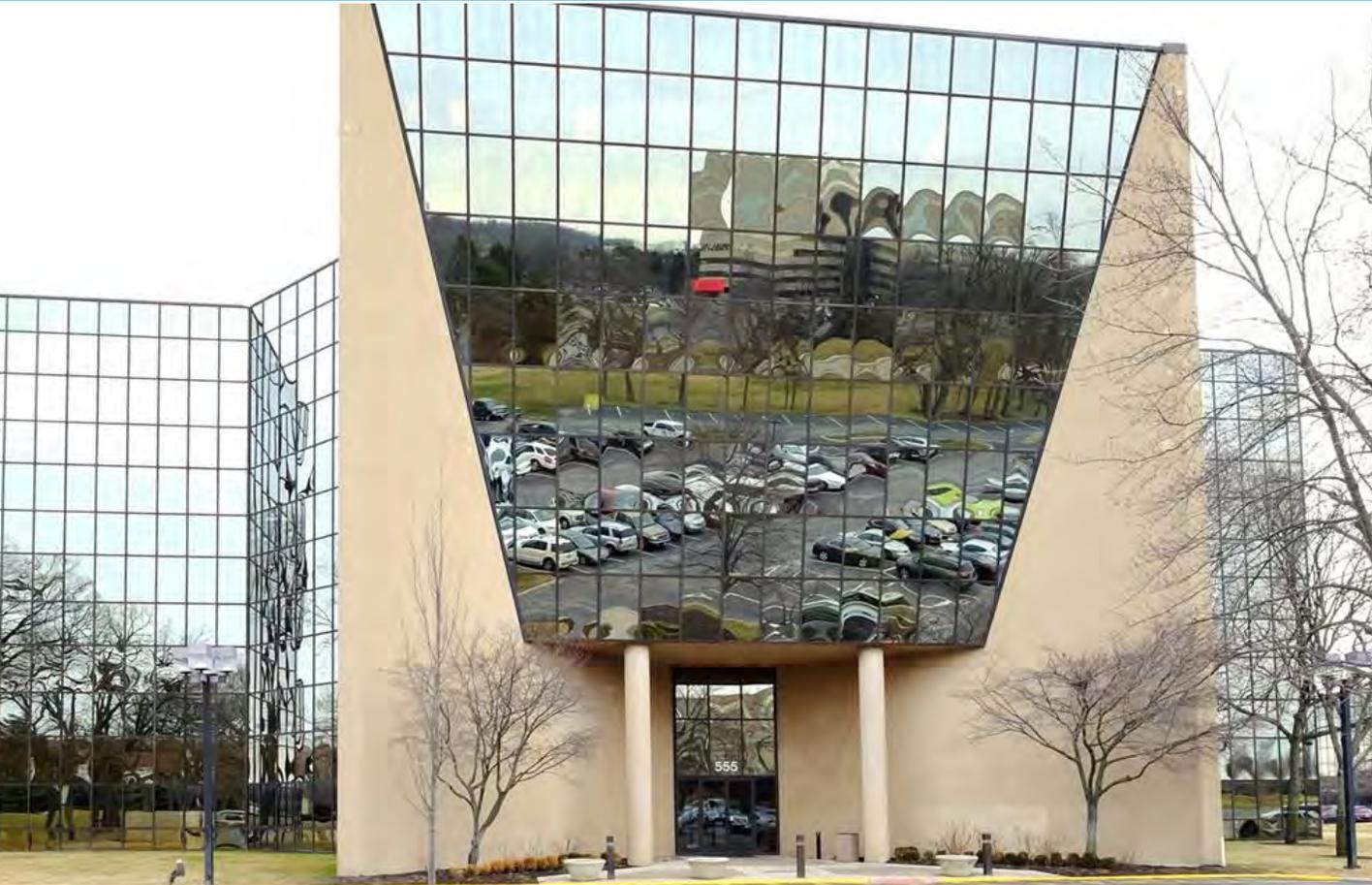
Richard Florida - International
Best-selling author, professor & urbanist

A top ranked suburb to live, work, and start a business, Dublin had long prided itself on “staying ahead of the economic development curve” and saw change coming

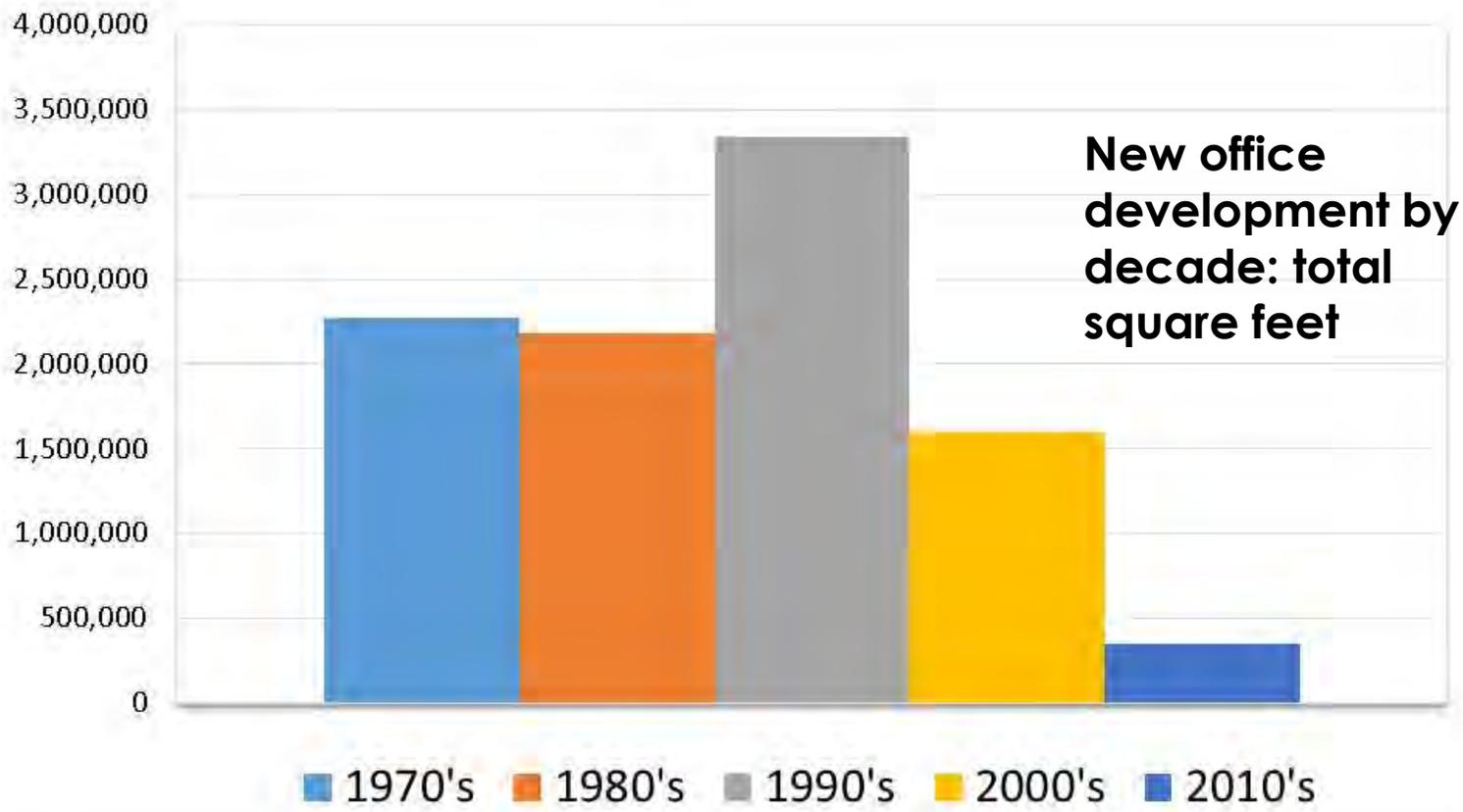


WHAT, ME WORRY?

MAD



The community came to understand that its class A office parks and high end subdivisions were losing their appeal to a changing world...and an aging Dublin



Community members drilled down into the trends that shaped the commercial office markets so important to Dublin's ability to fund a high quality of life.



Dublin, OH

A new walkable downtown would help Dublin retain and attract knowledge workers...and employers...and more important—create a new heart to the community



Dublin, OH

BridgePark represents the first phase, a three million SF mix of housing, office, retail, food, culture, education...and a new Scioto Riverfront “central park”.



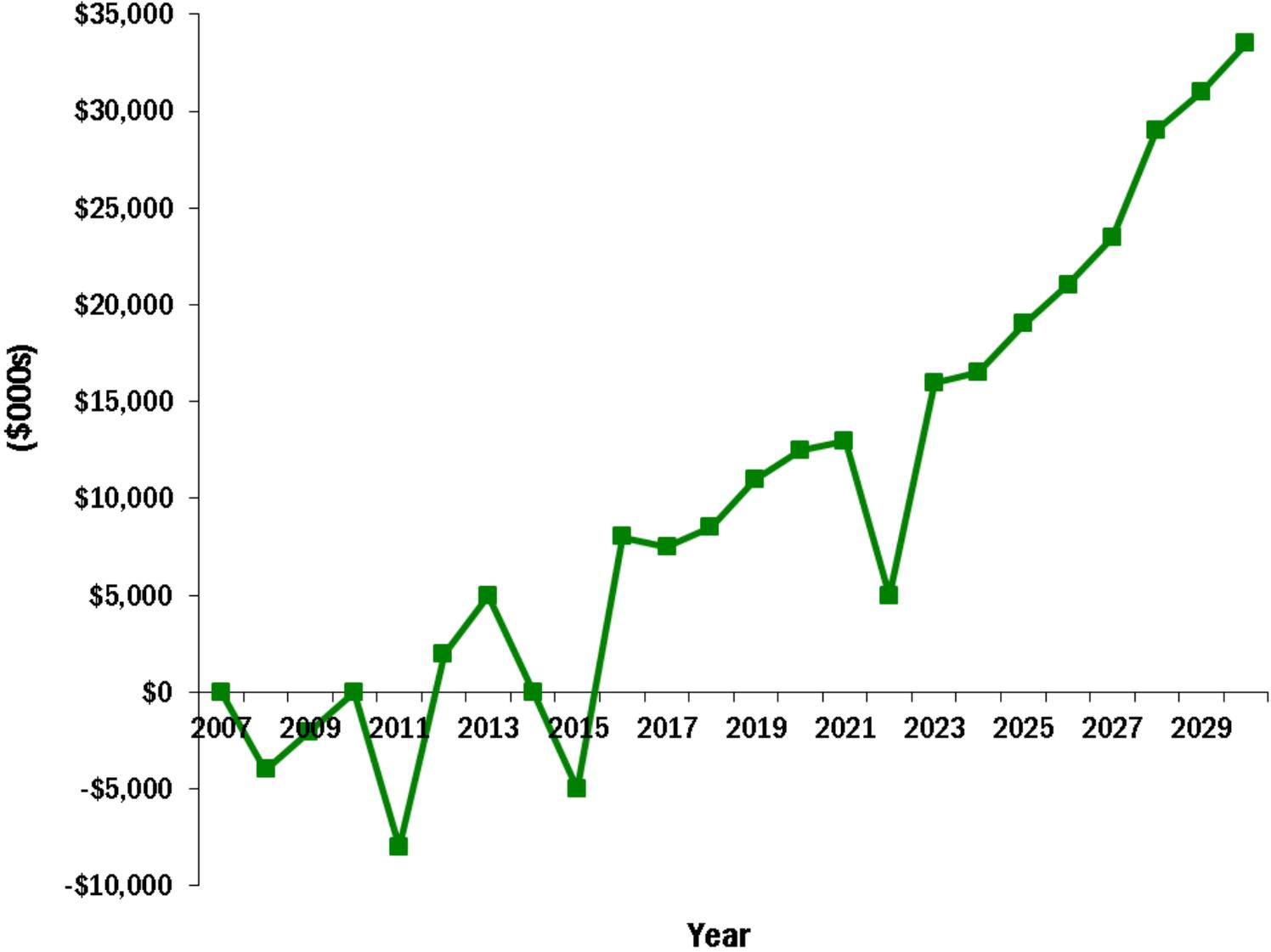
Dublin, OH



Dublin, OH



Total Annual Net Fiscal Impacts from New Growth



Dublin, OH

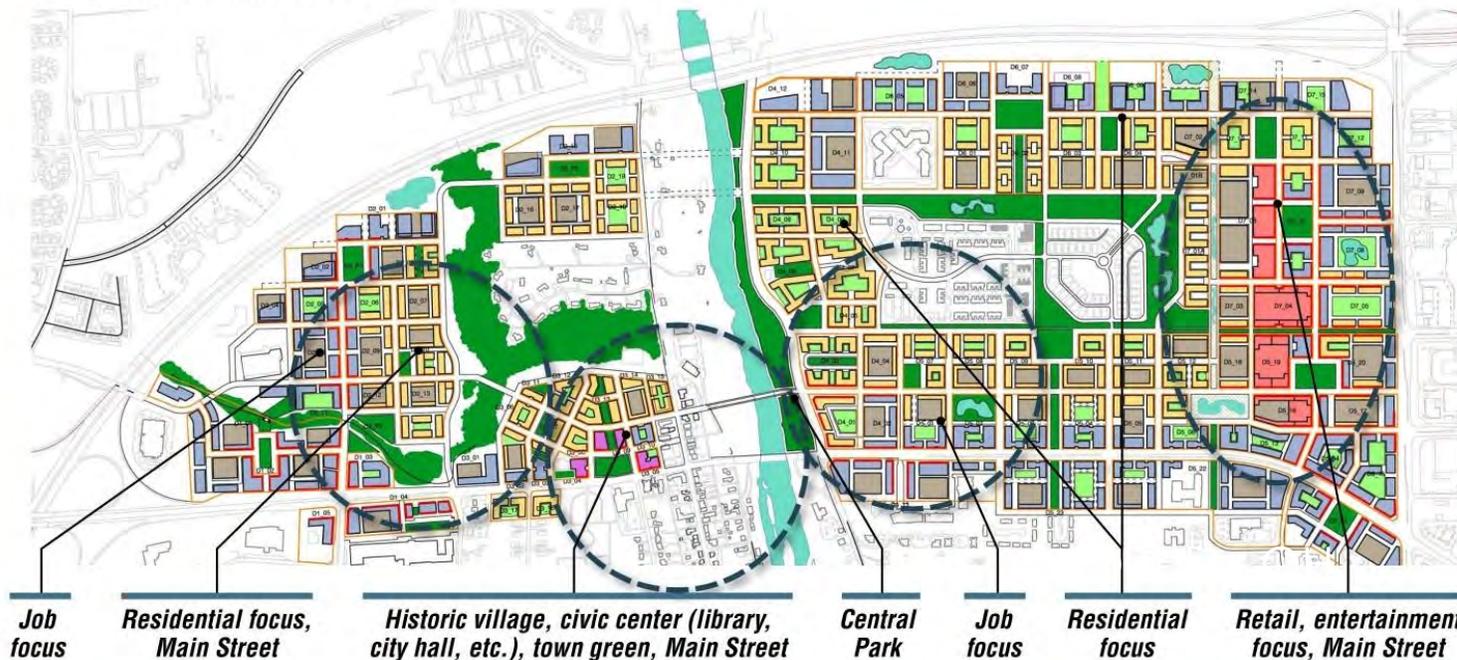
Process for creating walkable urban places: Transformative plan

Fourth step: Create a vision framework

Vision Principles

- Enhance economic vitality
- Integrate the new center into community life
- Embrace Dublin's natural setting and commitment to sustainability
- Expand "livability choices" for Dublin and the region
- Create places that embody Dublin's commitment to community

ILLUSTRATIVE VISION FRAMEWORK



Legend

- RESIDENTIAL
- OFFICE/COMMERCIAL
- CIVIC USES
- LARGE FORMAT RETAIL
- RETAIL FRONTAGE
- STRUCTURED PARKING
- PARKS & PUBLIC OPEN SPACE
- SEMI-PUBLIC OPEN SPACE
- UTILITIES
- WATER FEATURES RETENTION PONDS

Foundation for creating walkable urban places: **Compact critical mass**



Crystal City, VA

Crystal City's density and mix of housing and office were sufficient to support infilling a new generation of retail and lively public spaces



**Two to three million SF of mixed-use development
can support a lively, walkable urban destination**

Foundation for creating walkable urban places: **Market-driven redevelopment**



South Bay, Boston

Many traditional malls, strip centers, big box malls, and single-use office parks are losing value

An architectural rendering of a modern multi-story building at dusk. The ground floor features a mix of retail and food establishments. On the left, a theater entrance is visible with the word "THEATER" in large, illuminated white letters. To the right, a "burgers" restaurant has a prominent sign and a large outdoor seating area with string lights and planters. Further right, another "burgers" restaurant is visible, along with a "fries burgers" sign. The building has a mix of brick, wood paneling, and large windows. People are shown walking and sitting in the outdoor areas, creating a vibrant street scene.

THEATER

burgers

burgers

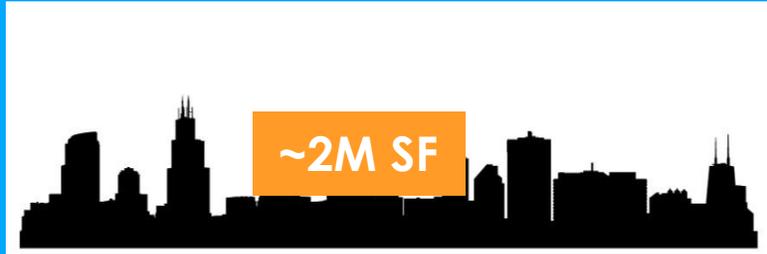
fries burgers

fries burgers fries burgers

South Bay, Boston

Increasing density 300-400% often unlocks redevelopment. Housing, with retail, food and entertainment at "street" level is often the strongest market

Water Street Tampa projected total build-out:



2013

2014



2015

2016

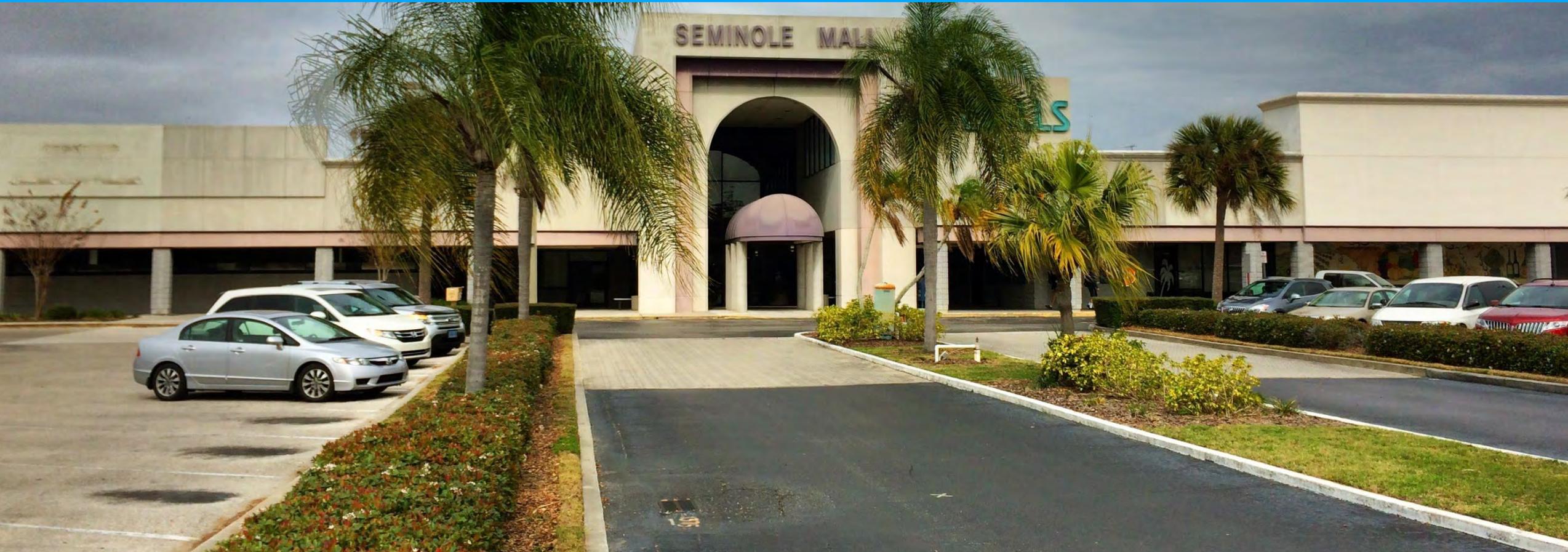


2017



Cities and suburbs alike face a growing shortage of high quality multi-family housing

Foundation for creating walkable urban places: Finding the right site to get started



A minimum of 50 to 100 acres—and willing owner(s)—are essential to launch creation of a lively, walkable, “urban” destination



Dayton Mall, OH

Creating a new urban place is usually a market-driven, incremental process



Less than \$250,000
\$250,000 - 500,000
\$500,000 - 750,000
\$750,000 - 1,000,000
\$1,000,000 - 1,500,000

Byers Rd

75

SR741

Lyons Rd

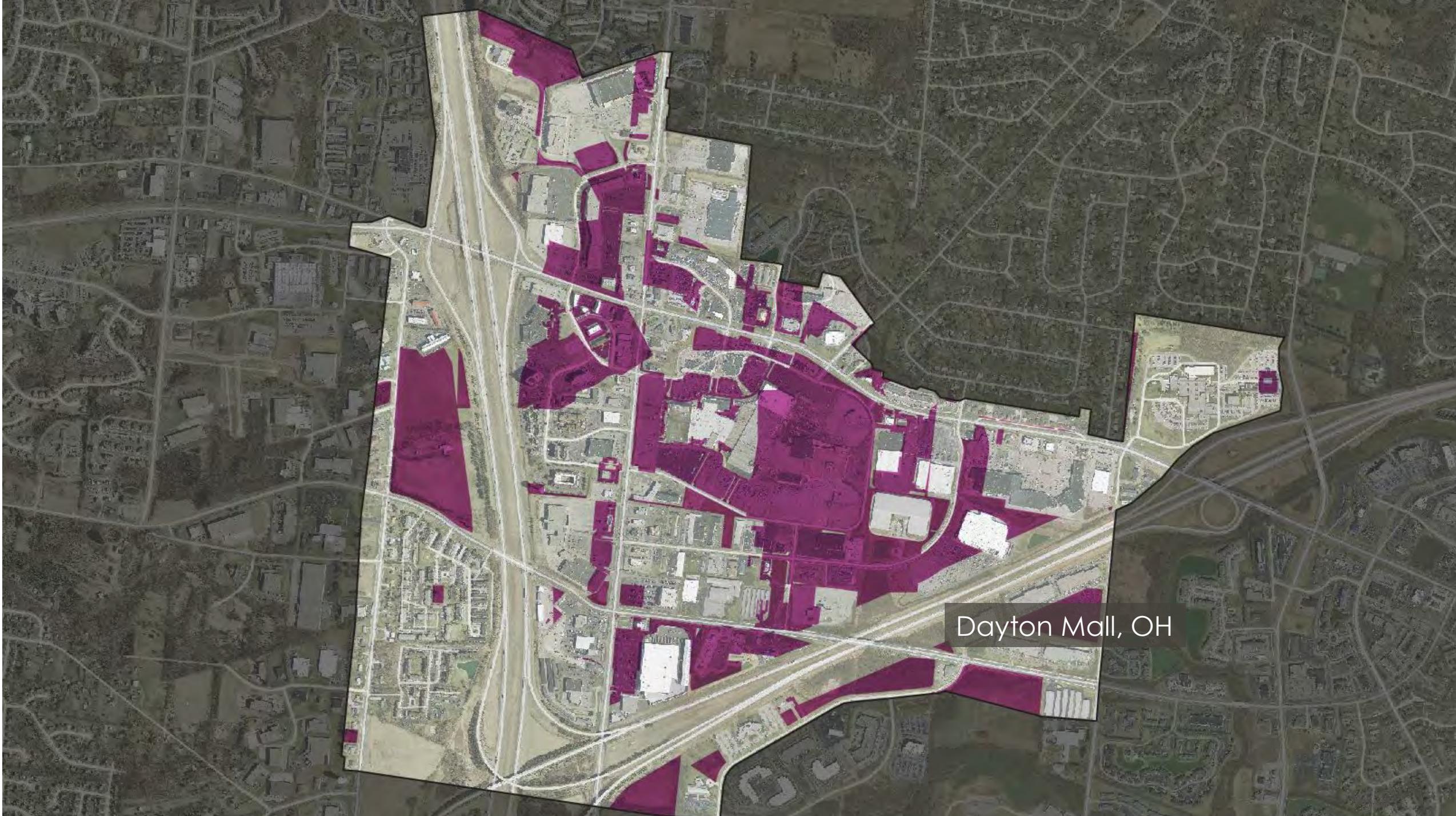
Mad River Rd

SR725

675

Dayton Mall, OH

N



Dayton Mall, OH



Dayton Mall, OH

Year 1-3



Dayton Mall, OH

Year 5-7



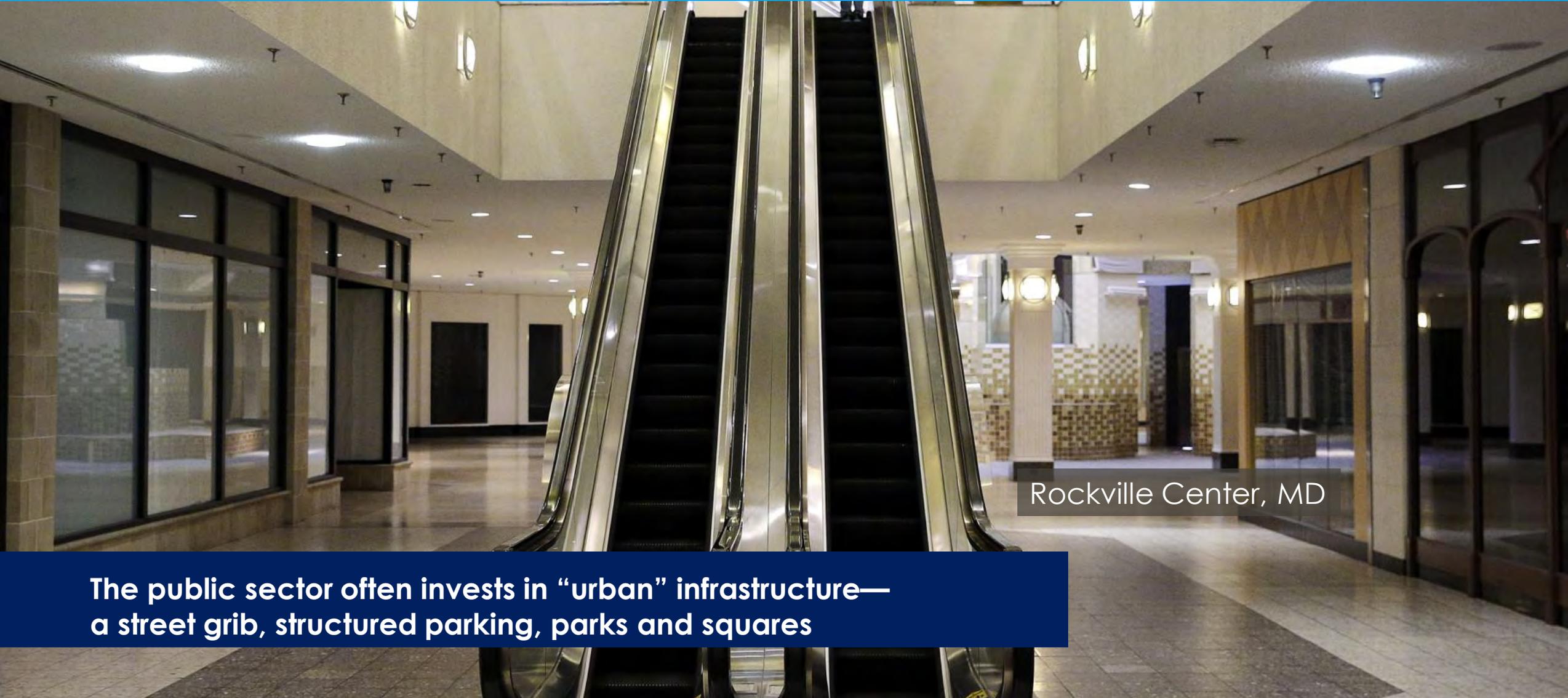
Dayton Mall, OH

Year 7-10



Dayton Mall, OH

Foundation for creating walkable urban places: Using fiscal benefits to support a P3



Rockville Center, MD

The public sector often invests in “urban” infrastructure—
a street grid, structured parking, parks and squares

Foundation for creating walkable urban places: Using fiscal benefits to support a P3



Rockville Center, MD

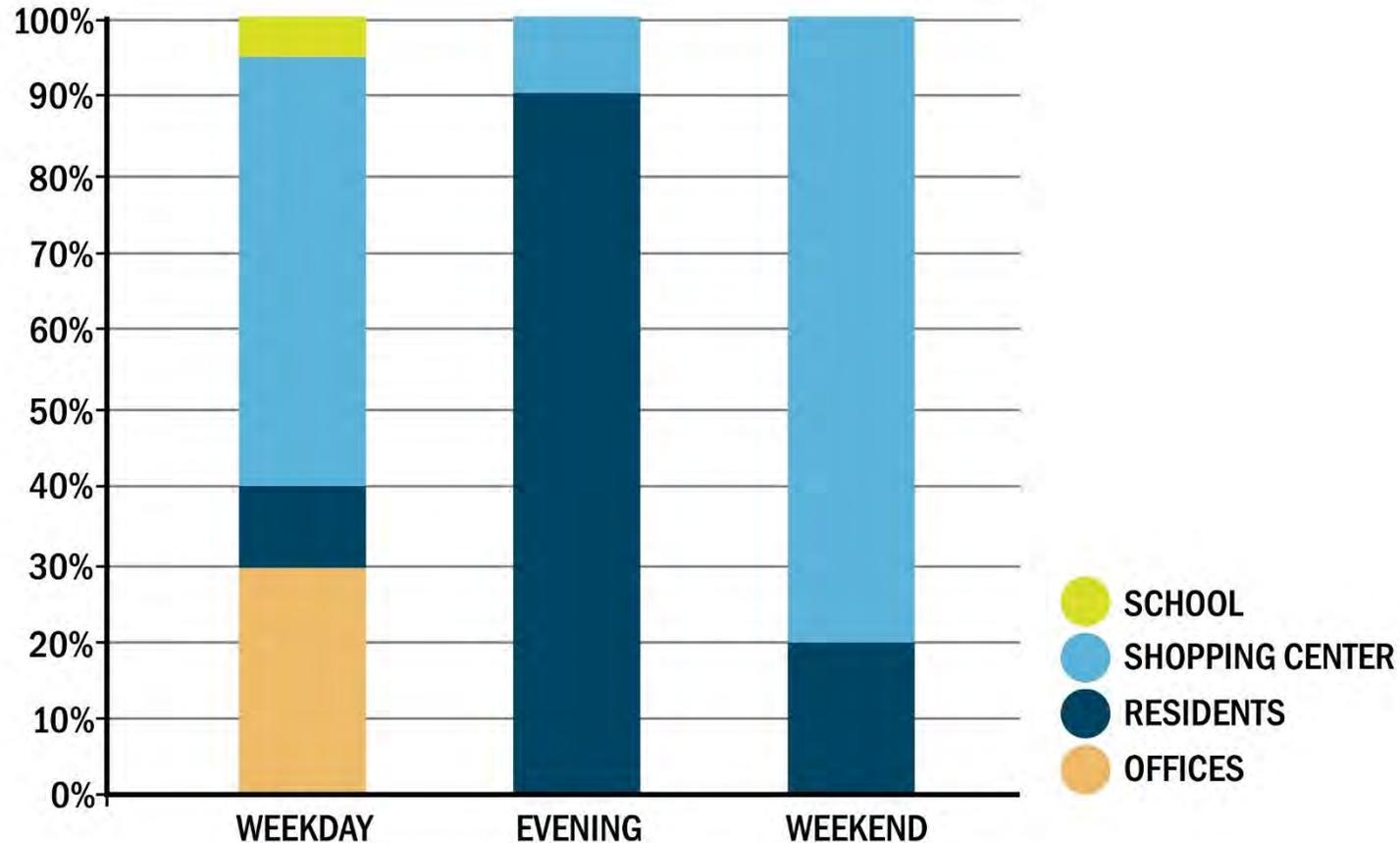
The public sector often invests in “urban” infrastructure—
a street grid, structured parking, parks and squares





Village Walk, Dallas

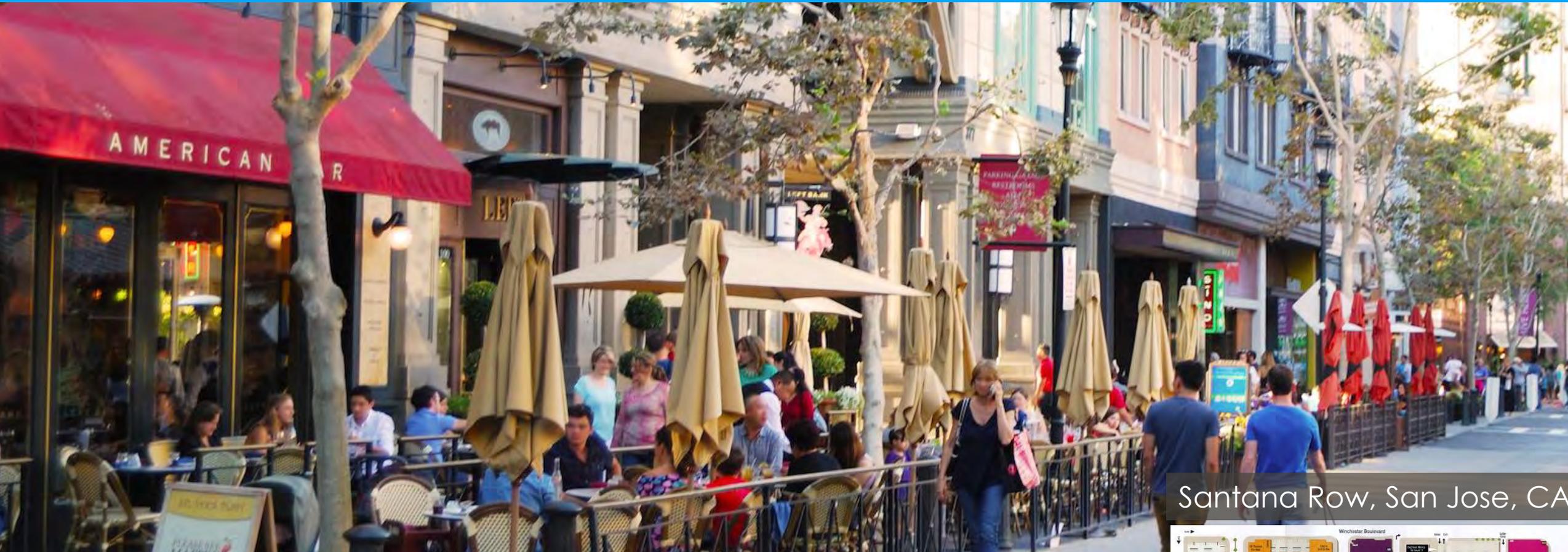
Foundation for creating walkable urban places: Shared parking strategies



Walkable densities require structured parking—shared parking strategies can reduce expensive parking requirements 15-30%

UD principles for creating walkable urban places:

1. Walkability



Santana Row, San Jose, CA

Continuous, active street-fronting uses that engage pedestrians—supported by street trees, public art, and similar amenities



UD principles for creating walkable urban places:

1. Walkability



Downtown District, Tampa

Continuous, active street-fronting uses that engage pedestrians—supported by street trees, public art, and similar amenities



UD principles for creating walkable urban places:

1. Walkability

	URBAN	EXURBAN
Walkable retail	100%	na
Miles per year	100,000	20,000-25,000



Walkable retail supported by 1,000 to 2,000 new housing units

UD principles for creating walkable urban places:

1. Walkability



Walkable retail

negligible

na

Miles per year

15,000-20,000

20,000-25,000

Walkable retail supported by 1,000 to 2,000 new housing units

UD principles for creating walkable urban places:

1. Walkability

	URBAN	SUBURBAN	EXURBAN
			
Walkable retail	30-50,000SF	negligible	na
Miles per year	5,000-10,000	15,000-20,000	20,000-25,000

Walkable retail supported by 1,000 to 2,000 new housing units

UD principles for creating walkable urban places:

2. Connectivity



Emeryville, CA

Continuous, active street-fronting uses that engage pedestrians—supported by street trees, public art, and similar amenities



Emeryville, CA



Continuous, active street-fronting uses that engage pedestrians—supported by street trees, public art, and similar amenities

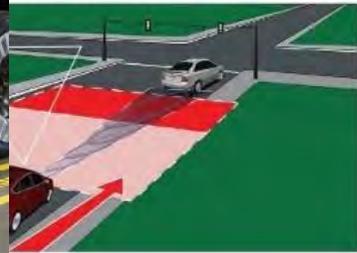


Continuous, active street-fronting uses that engage pedestrians—supported by street trees, public art, and similar amenities



2008 Ford Motor Company debuts driver-assist technology features – Blind Spot Information System, lane-keeping system and active park assist

2009 Ford sends a car on a 10,000-mile journey, nicknamed "The Mother of All Road Trips," to test collision warning with brake assist and other systems



2013 Ford launches fleet of 10 Fusion Hybrid autonomous research vehicles for testing and development



2015 Ford transitions from the research phase of fully autonomous vehicle development to the advanced engineering phase



2015 Ford performs the first demonstrated autonomy test in snow



2016 Ford announces it will triple its autonomous test fleet

2009

2013

2015

2016

2021

2015 Ford secures a license to test autonomous vehicles in California and opens its Palo Alto research center

2015 Ford becomes the first automaker to test a fully autonomous vehicle at Mcity



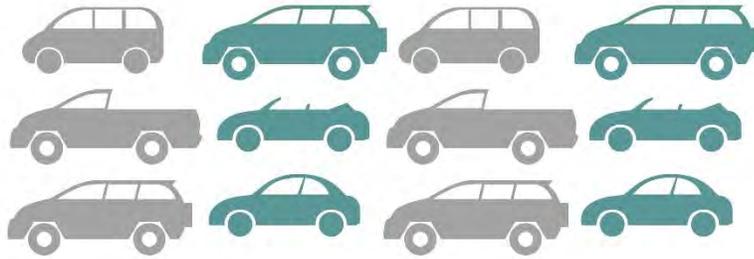
2021 Ford intends to mass-produce a high-volume, fully autonomous, SAE level 4-capable vehicle for ride-hailing or ride-sharing services

1 SAV can...



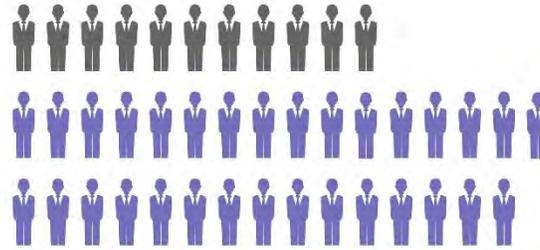
SAV lifecycle = only 2 years

Replace



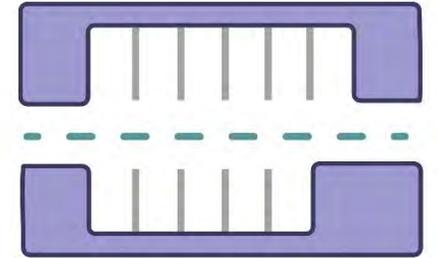
12 conventional vehicles

Serve



31-41 persons a day

Eliminate



11 parking spaces

11%



increase in passenger's overall travel distance with pooling

Source: D. J. Fagnant, K. M. Kockelman (2014), *The travel and environmental implications of shared autonomous vehicles, using agent-based model scenarios*, *Transportation Research Part C: Emerging Technologies*, 40, March 2014.



\$1.60/mi.

Total Cost of a Conventional Vehicle (including time value) vs. SAVs



\$0.41/mi.

Source: L.D. Burns, W.C. Jordon, B.A. Scarborough (2013), "Transforming personal mobility", *Earth Island Institute, Columbia University*, 2013.

UD principles for creating walkable urban places:

3. Community



New urban centers can become the heart for increasingly diverse suburbs

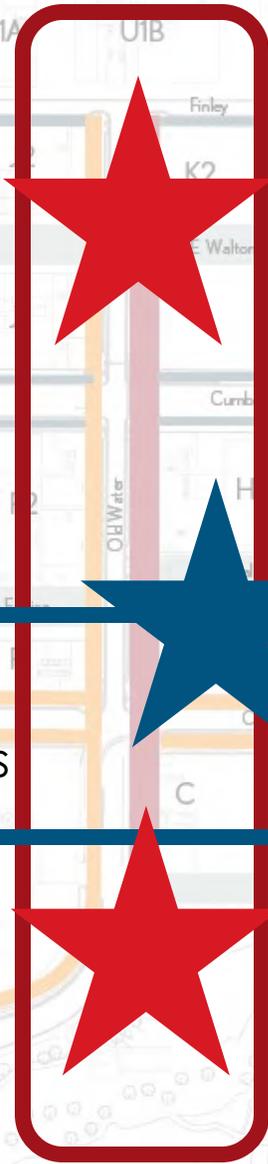
UD principles for creating walkable urban places:

4. Choices



Increasingly diverse communities seek increasingly broad choices to live, work, play...and carry out the rest of life

Downtown



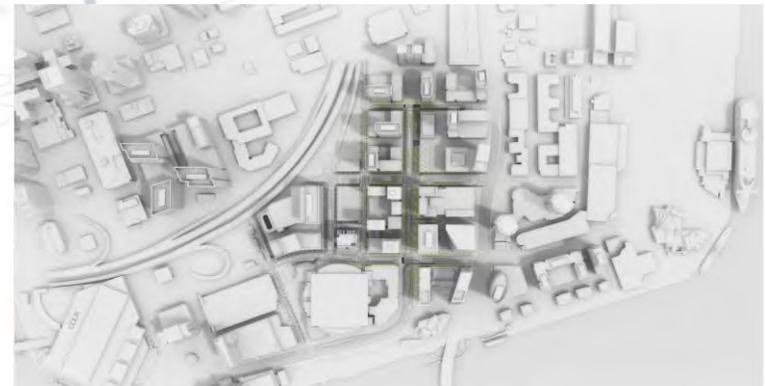
Arts, culture, science, music

Health, research

Convention center



Sports



UD principles for creating walkable urban places: 5. Authenticity



Village Walk, Dallas



7
KICK

ART
GALLERY
STORES
STUDIOS
EVENTS

7
BLOCK

GALLERY
STORES
STUDIOS
EVENTS

PARKING

DESIGN

FR
CI
P

Anam Caro Living Arts
Studio & Gallery
Alternative Arts & Inspiration

MELISSA BROWN
FINE ART

block
7

VALKARIE
GALLERY · STUDIO

block
7

block
7

SUBURBAN REMIX

CREATING THE NEXT GENERATION OF URBAN PLACES

South Florida REIS November 28, 2017



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