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Streetsense



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RESILIENT RETAIL **in the Internet Age**

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Adams Morgan BID



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**The
New York
Times**

Google and Walmart partner with eye on Amazon.
August 23, 2017.

CNN Money

Retail's Toughest Year: A record for store closings.
December 27, 2017

Fortune

Toys R Us closing all of its U.S. stores amid bankruptcy.
March 9, 2018

Bethesda
MAGAZINE

Barnes and Noble to Close on Bethesda Row.
March 31, 2017

2017 BLACK FRIDAY

Best Buy, Fair Oaks Mall, Fairfax VA



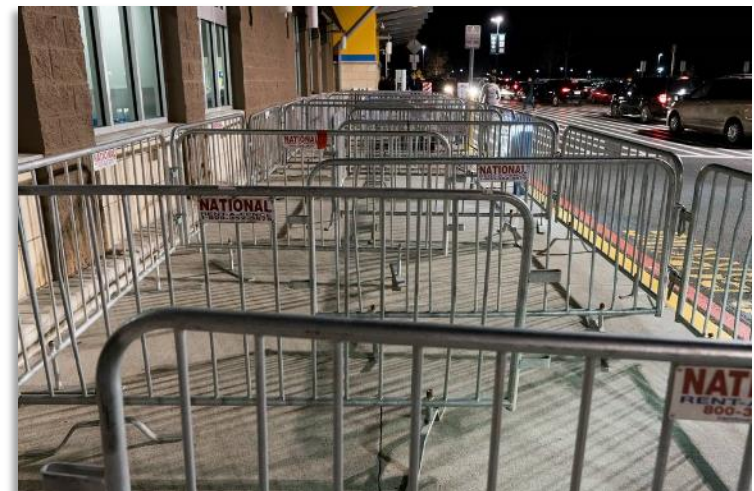
Matt McClain/Getty Images, Ting Shen/Wall Street Journal

Source: *Black Friday: Then and Now*. Wall Street Journal, November 24, 2017.

Wal-Mart, Fair Lake Shopping Center, Fairfax VA

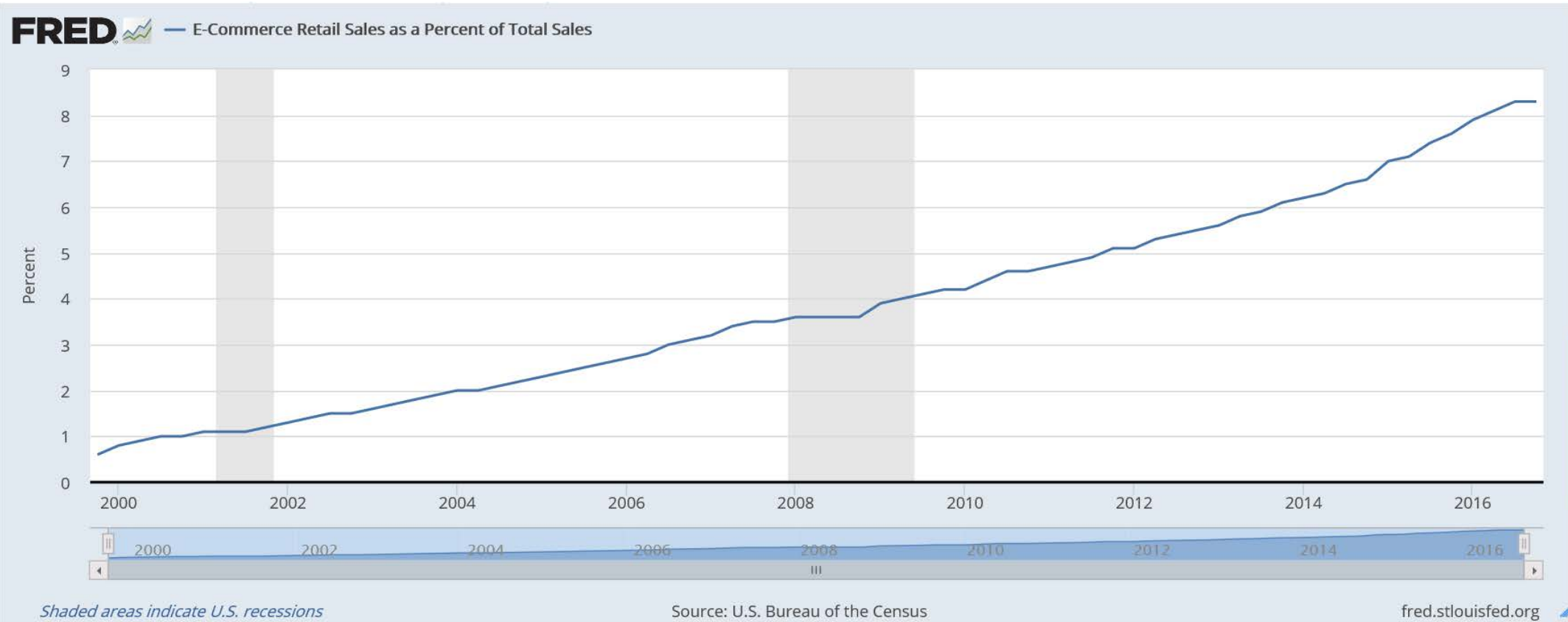


2008



2017

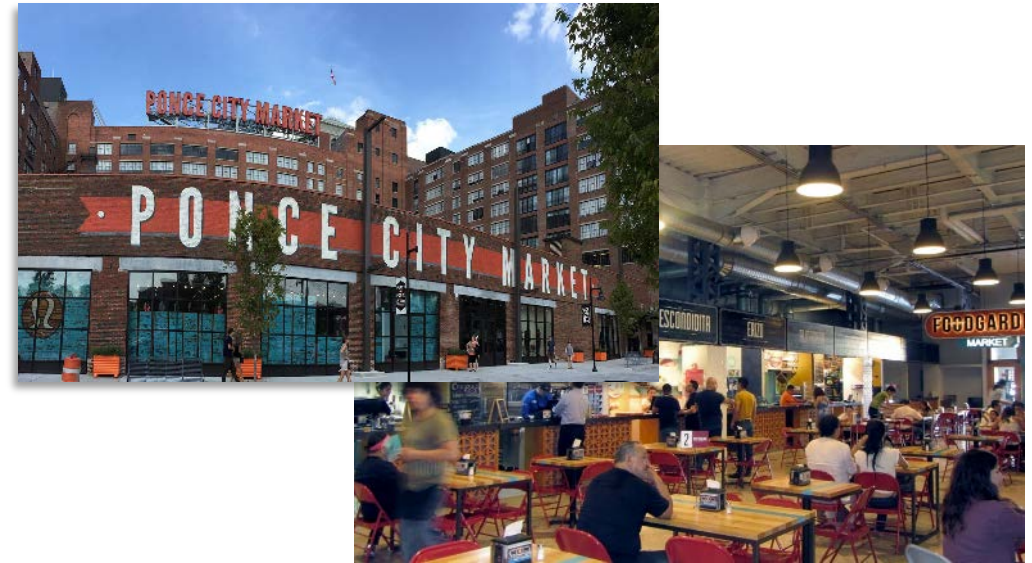
THE E-COMMERCE TAKEOVER



THE RAPIDLY CHANGING RETAIL ENVIRONMENT: TRENDS



E-Commerce



Experience-Based Retail



Showrooms



Urbanizing Formats

EFFECT ON BRICK AND MORTAR RETAIL



Declining Malls



Changes to Anchor Stores



Non-Retail Uses



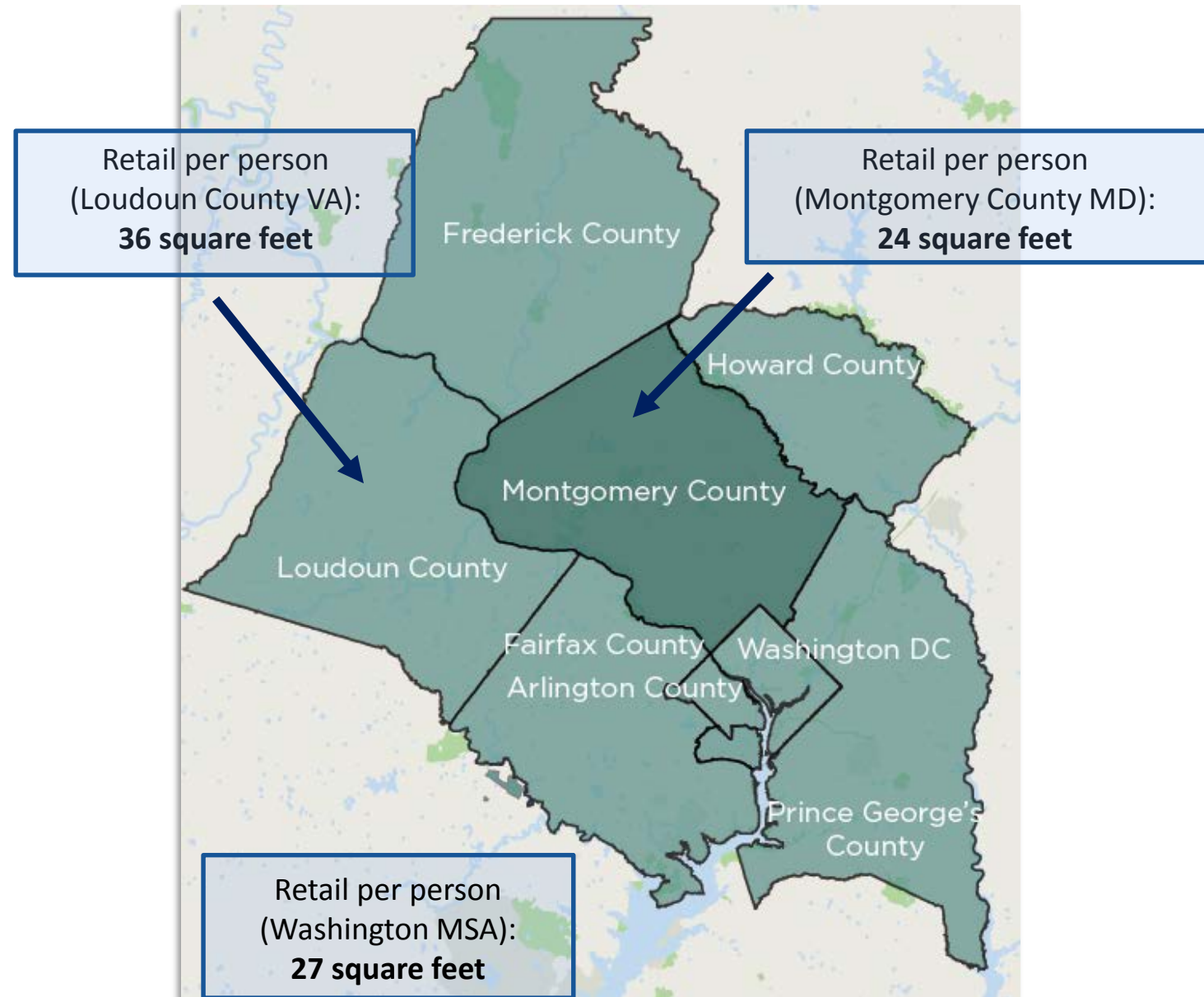
Underutilized Retail

THE CURRENT STATE OF RETAIL

Total amount of retail space in the US: **13 billion**

1 billion SF would need to be repurposed or demolished to reach equilibrium

Ratio of retail per person (US): **23 square feet**



"WE AREN'T
OVERRETAILED.
WE'RE UNDER
DEMOLISHED."

Daniel Hurwitz, GGP



THE CURRENT STATE OF RETAIL



However, we also don't have enough (of the right kind).

HOW DO WE
CREATE ENDURING,
“RESILIENT” RETAIL?

Resilient Cities, Peter Newman

“A **Resilient City** is one that has developed capacities to help absorb future shocks and stresses to its **social, economic, and technical systems and infrastructures [physical]** so as to still be able to maintain essentially the same functions, structures, systems, and identity.”

PURPOSE OF RETAIL

Retail as Identity

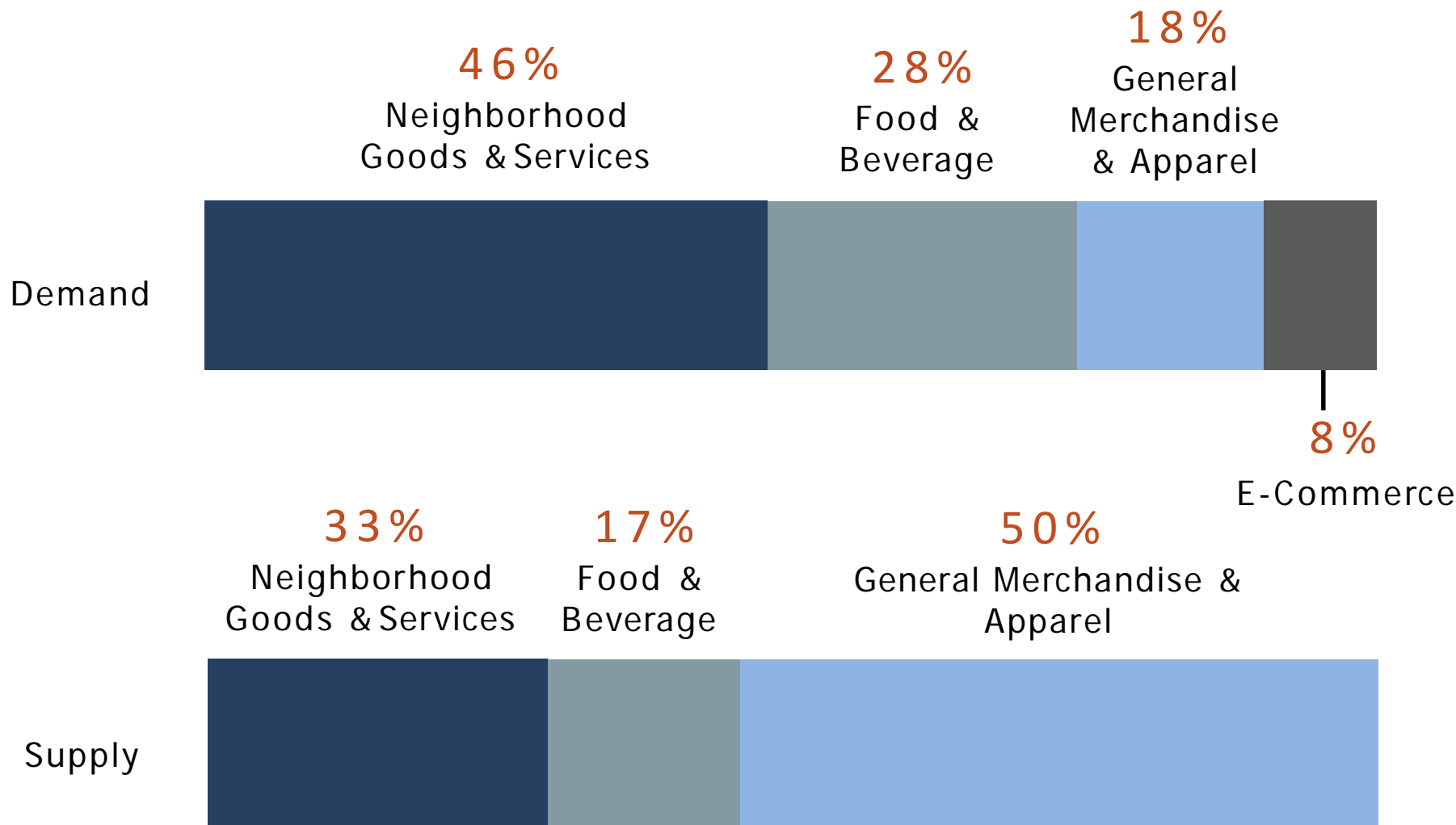
Retail as Amenity

Retail as \$\$\$ Generator

Retail as Civic Use

Retail as Commerce

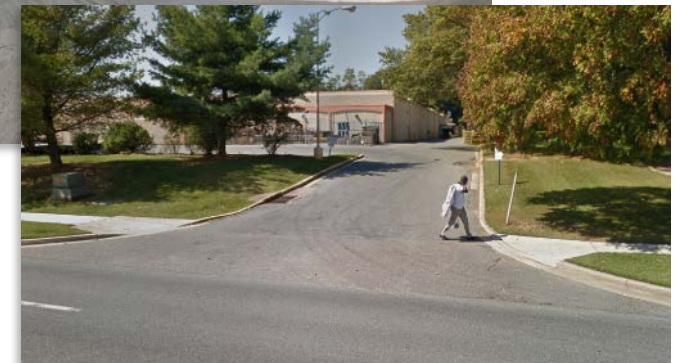
Appropriate type



RESILIENT RETAIL: FACTORS

Appropriate location

- Visible
- Accessible
- Centralized





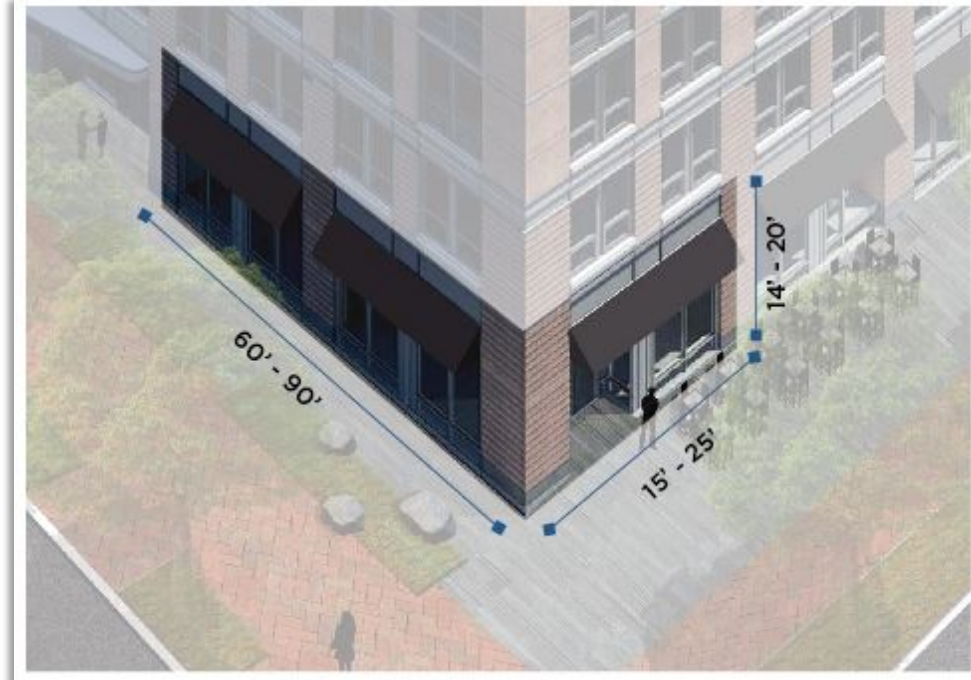
Appropriate market

- Demand
- Place-Based
- Serves a variety of lifestyles





- **Appropriate space**
 - Reoccupied without (much) modification
 - Proper dimensions



How can government and industry work together to adapt to more resilient retail environments?

Panel Discussion

- **Bobby Boone**, Senior Retail Analyst, Streetsense
- **Atul Sharma**, Regulatory Planner, Montgomery County Planning Department
- **Kristin Barden**, Executive Director, Adams Morgan Partnership Business Improvement District

A modern office interior with large windows, a wooden table, and red chairs. The room has a high ceiling with exposed pipes and two large pendant lights hanging over the table. The floor is polished and reflects the light from the windows. The text 'S.' is overlaid in the center of the image.

S.

AN EXPERIENCE CONSULTANCY

OUR VALUE

is created by curating unique experiences that differentiate an asset from its competitive set.

What's Resonating:

- + Local context
- + Hospitality vibe
- + Seamless connectivity
- + Culture of belonging
- + Constant evolution



OUR PROMISE

*WE CREATE BRANDS PEOPLE LOVE
AND PLACES PEOPLE LOVE TO BE*



S.

S.[®]

CONDITIONS IMPACTING THE RETAIL MARKET



BIG, EMPTY, AND INFLEXIBLE



RULES AND REGULATIONS

OUT OF DATE & LIMITING



KNOWLEDGABLE

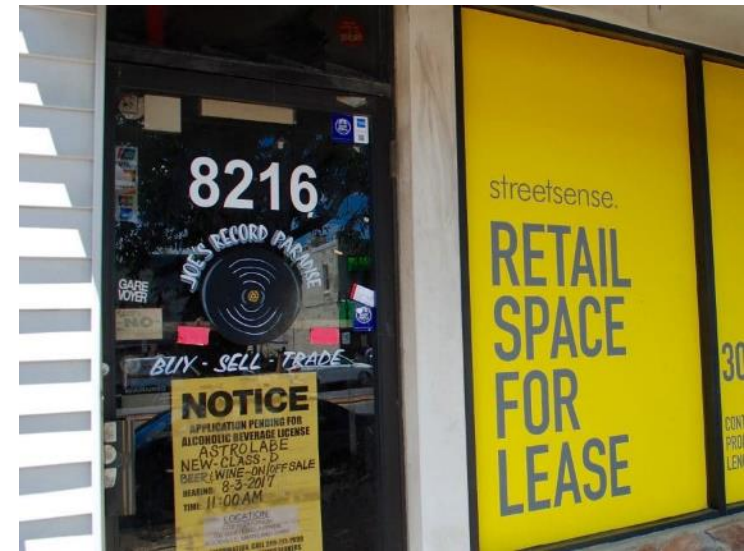
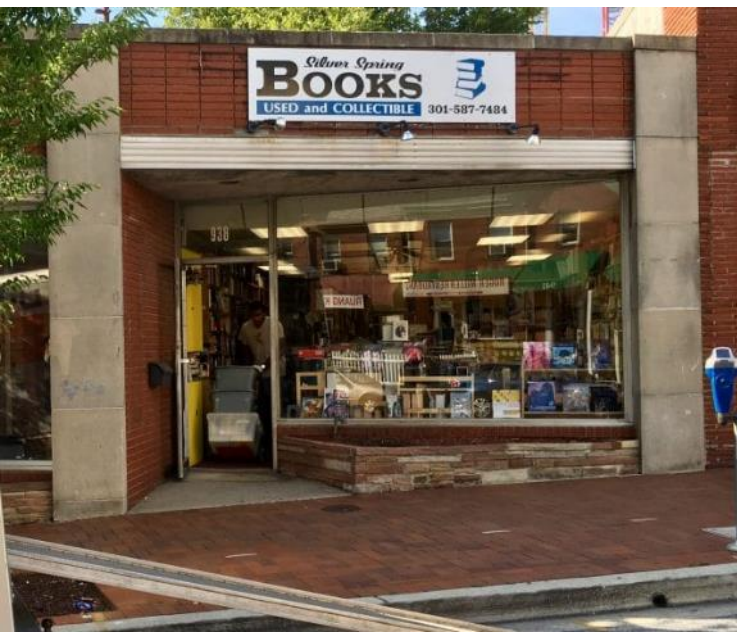


CONVENIENT



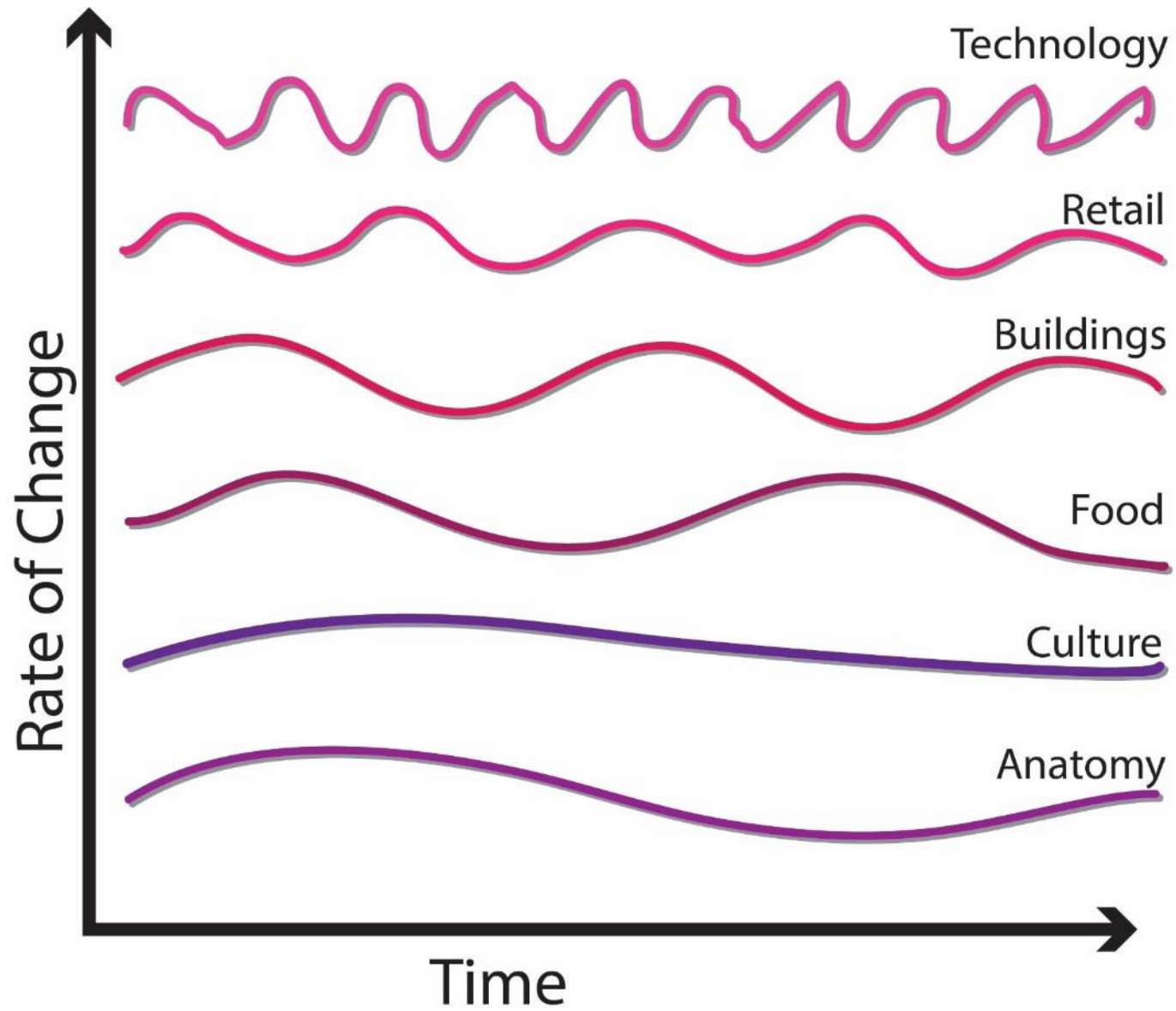








Understanding Change vs. Stability





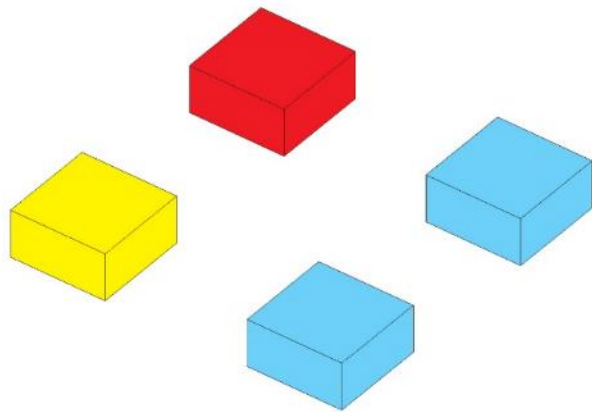
THE MONTGOMERY COUNTY BICYCLE MASTER PLAN

PUBLIC HEARING DRAFT | DECEMBER 2017

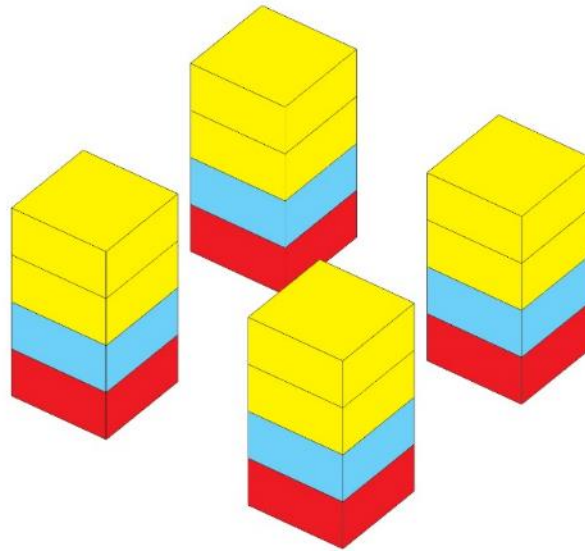


Creating a flexible framework

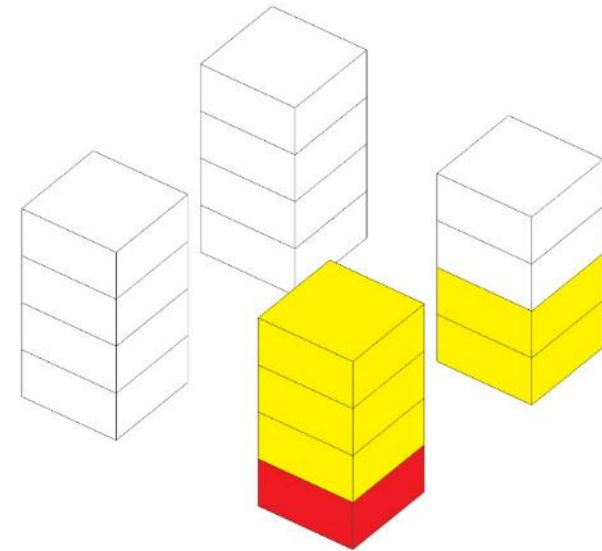
Old Zoning

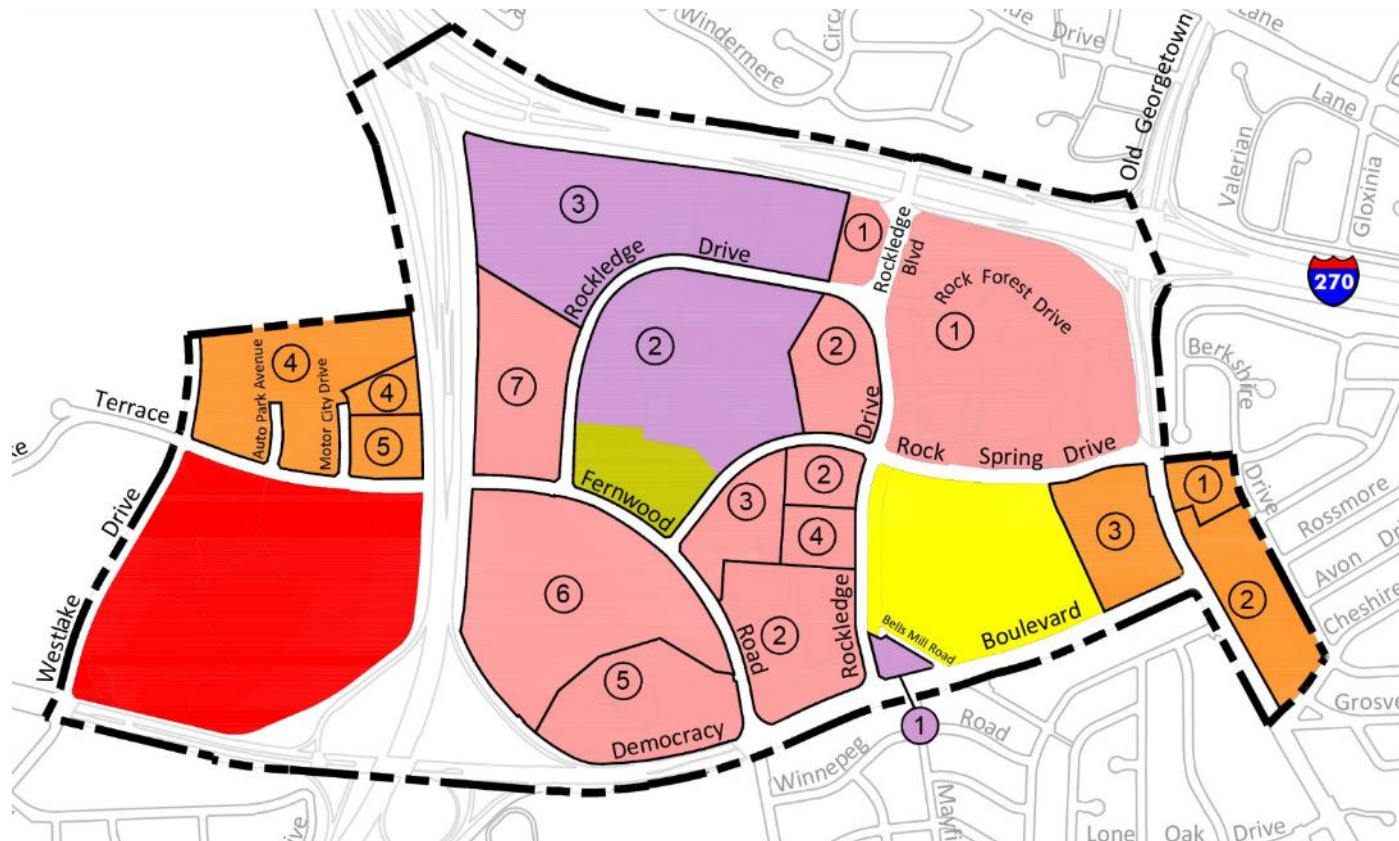


New Zoning



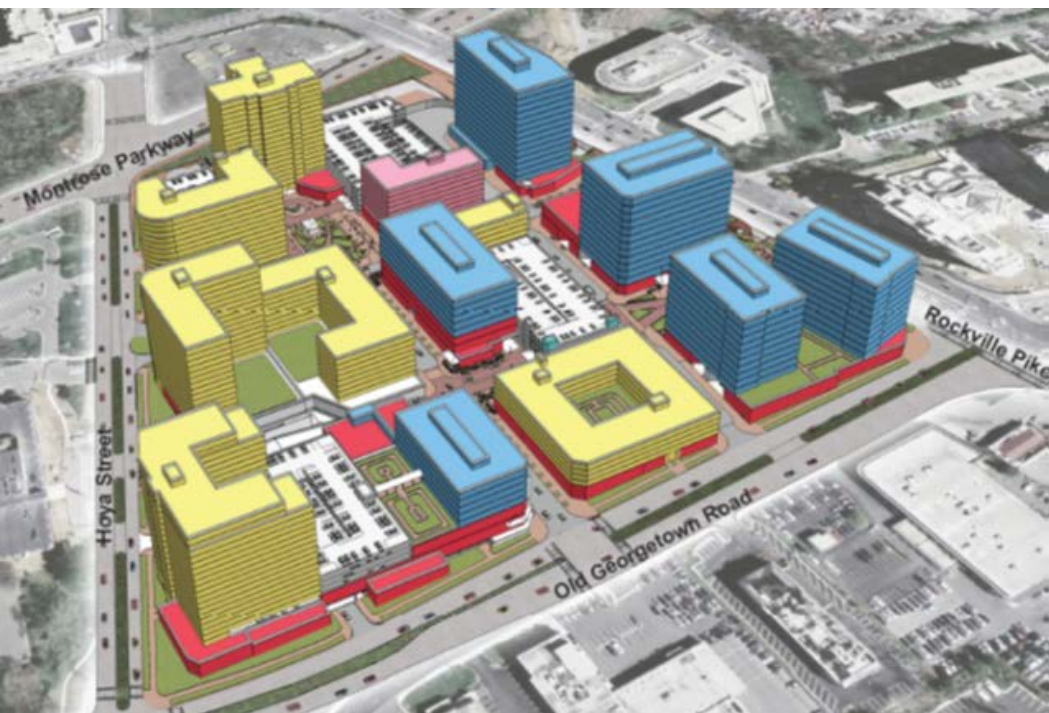
Market?





Decoupling Parking From Retail



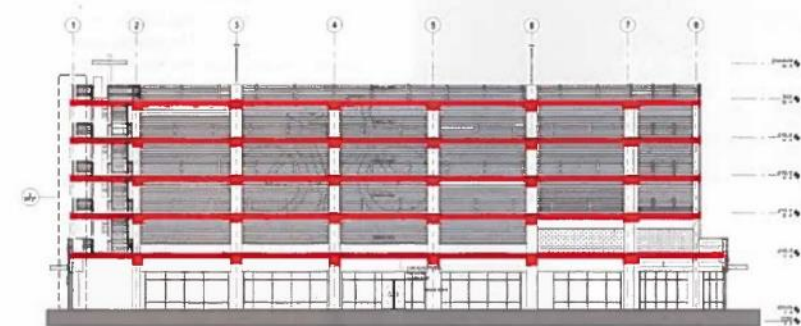
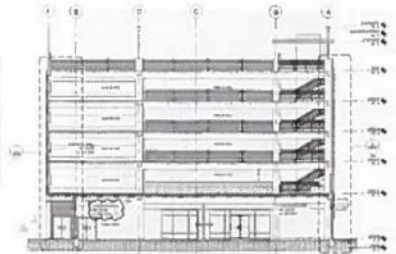


Encouraging Resilient Building Types

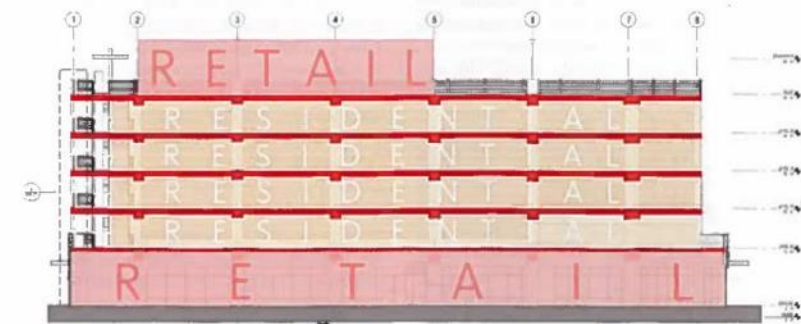




**FAIRVIEW DISTRICT,
Houston**
Five floors of parking in this mixed use building can transition to other uses if parking demand drops.



BUILDING SECTION 1
THE DESIGN EMPLOYS flat floor plates and speed ramps, accommodating parking for 38 cars on floors 2 through 6 and retail space on the ground floor. Once the ramps are removed, the floors can be leveled and repurposed for alternate uses.



BUILDING SECTION 2
OPPORTUNITIES for retail and residential programming open up in a flat-floor parking structure once ramps are removed, as shown in the reconfigured drawing of the Fairview District's garage.

Place Led Retail Development









Kristen Barden, Executive Director Adams Morgan Partnership BID



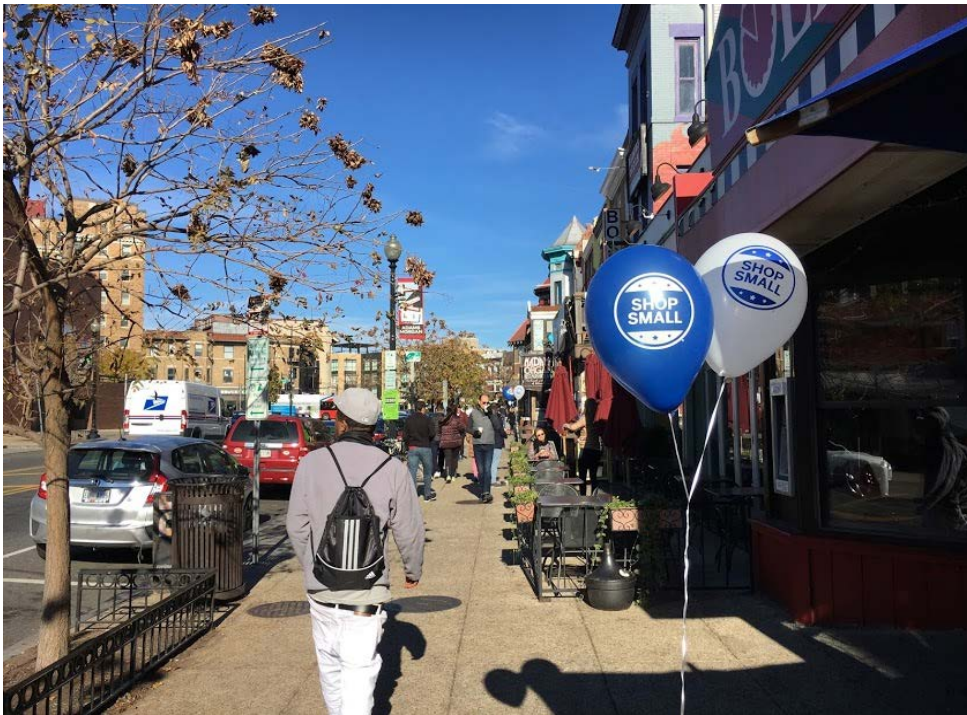
ADAMS MORGAN



PARTNERSHIP
BUSINESS IMPROVEMENT DISTRICT
WWW.ADAMSMORGANONLINE.ORG



Case Study: Adams Morgan – How to get residents to shop locally?



Adams Morgan has high population density and residents with high incomes but they don't work here

Answer: Create vibrant streets and experiences to match!



Create a sense of community and document the impact to show retailers that it works!



Urban Dwell: How to combat online purchases?
Create an inviting experience with sights,
sounds and smells



Shop Small: Provide customized and personal service for customers and merchandise that they can't get online



Thank you and
Shop Adams Morgan!

