



PHX

LAND REUSE
STRATEGY

Inventory & Market Data

Study Elements



**Community
Engagement**



Inventory



**Market
Analysis**



**Strategy
Development**



Inventory

- Benchmarking Analysis
- Data Collection
- Review Other Plans
- Environmental Review
- Constraints Analysis
- Broad-based Valuation

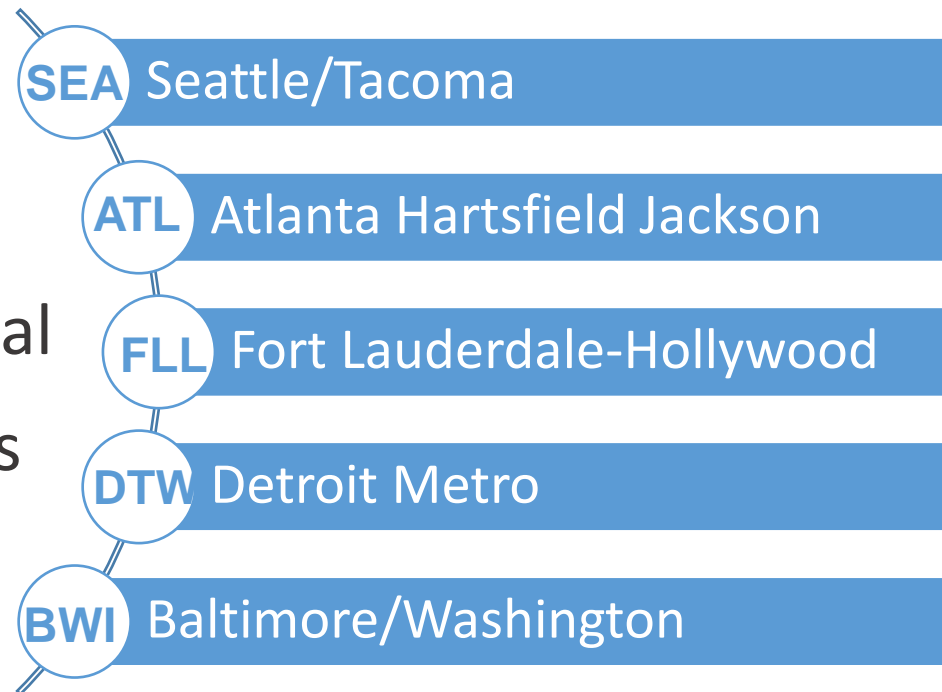


Market Analysis

- Potential Land Uses
- Preliminary Market Analysis
- Demand Allocation Strategy
- Implementation Models
- Retention/Disposition Strategy

Airport Benchmarking

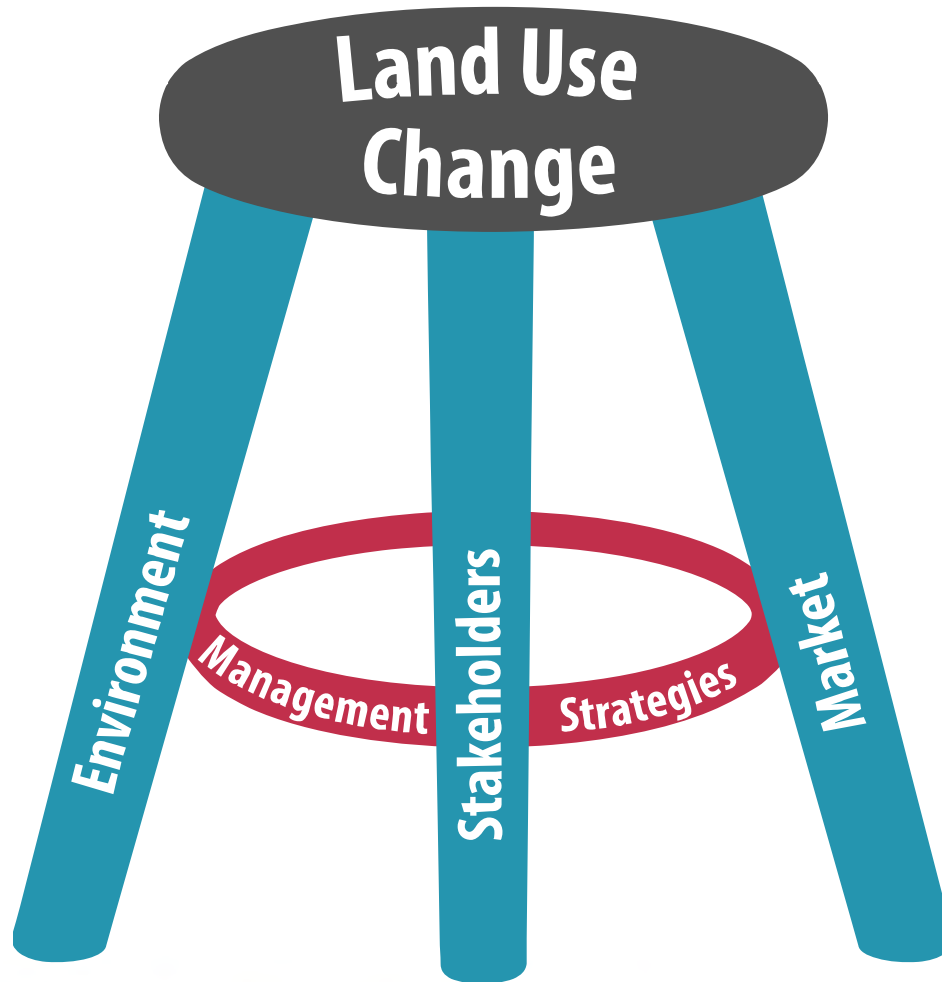
- > Details of program
- > Uses placed next to residential
- > Replacement of residential
- > Identification of land uses
- > Address changes in noise contours
- > Innovative strategies



Airport Benchmarking

- > Similarities
 - > Patchwork of acquired parcels
 - > Numerous jurisdictions involved
- > Plan development
 - > Varied levels of community engagement
 - > Land assembly
- > Recommended Uses
 - > Market driven
 - > Restrictive covenants ensure compatible use
- > Implementation Strategy
 - > RFPs for long-term leases
 - > Auction of parcels to brokerage firms
- > Differentiations
 - > Community guidance/input is key to PHX reuse strategy
 - > Goal to benefit neighborhood

Land Use Management Model



Management Strategies



Regulatory

- > Zoning
- > Design guidelines
- > Deed restrictions

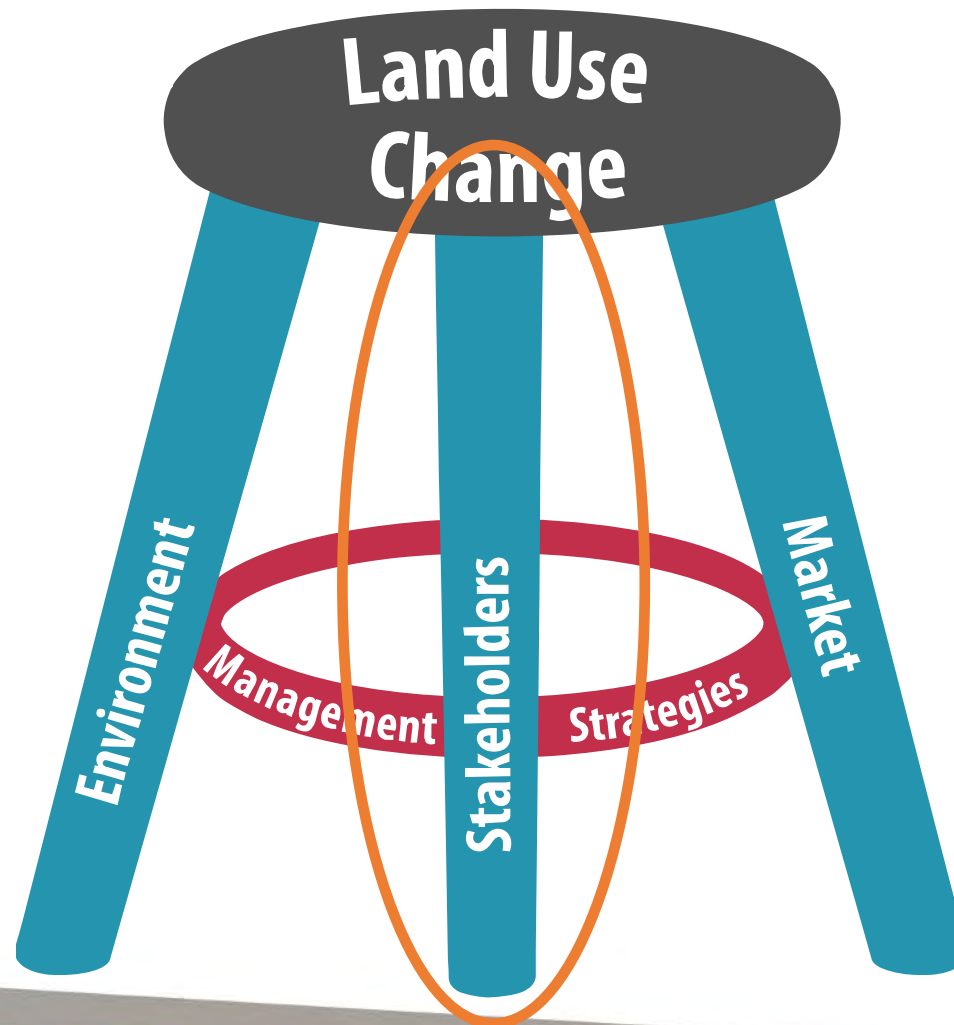
Incentives

- > Tax incentives
- > Grants
- > RFP structure

Preliminary Market Analysis

- > Identification of Land Uses
 - > Inventory/Best practices
 - > Stakeholder interviews/meetings
- > Land Uses
 - > Commercial: office and retail (potential mixed-use format)
 - > Industrial/flex
 - > Tourist accommodations: hotel
- > Benchmarking
- > Analysis Methodology
 - > Historical trends
 - > Projections of employment and population

Land Use Management Model



Stakeholder Engagement: Takeaways

- > Program Success Looks Like...
 - > Coherent development plan
 - > Think big/bold
 - > Flexibility—between conceptual and detailed strategy
 - > Land assembly
 - > Address ground lease terms—need 40–50 years
 - > Historical/cultural considerations
 - > Context sensitivity to remaining residential & transition

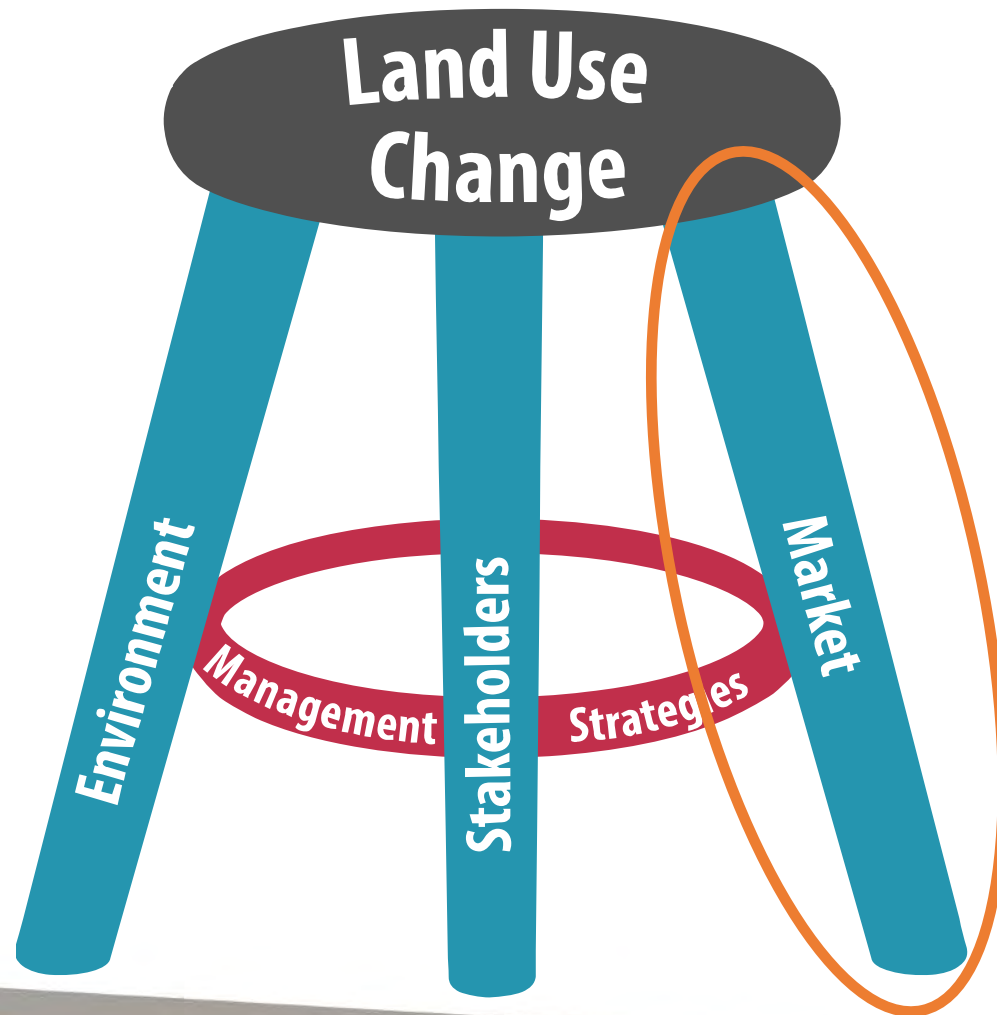
Stakeholder Engagement: Takeaways

- > Potential Strategies
 - > Zoning
 - > Expand Enterprise or Foreign Trade Zones
 - > Tactical urbanism
 - > Financial incentives; public-private partnerships
 - > Leverage proximity to multiple transportation modes
 - > Acquire parcels: residential/underused parcels

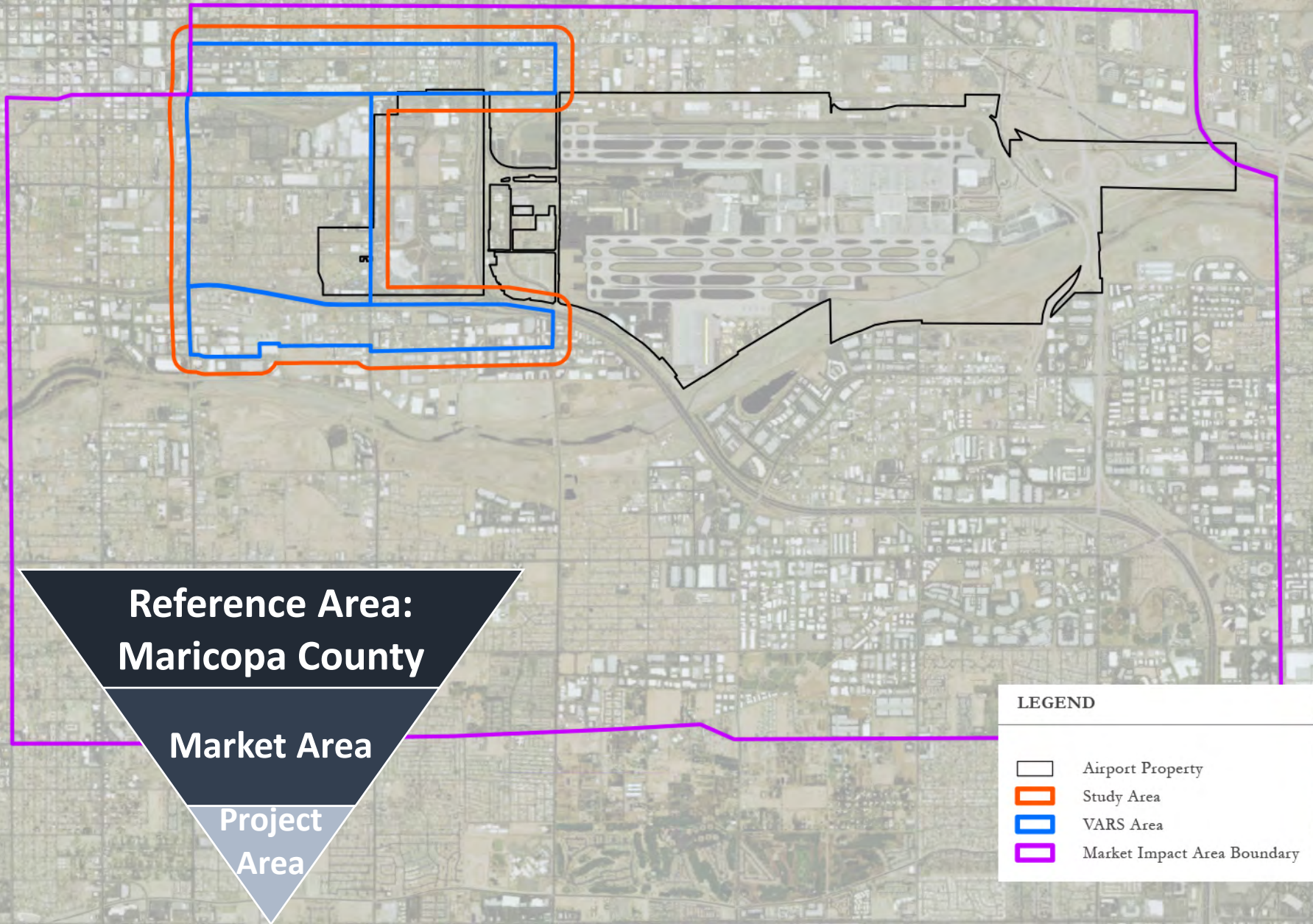
Stakeholder Engagement: Takeaways

- > Desired Uses
 - > Industrial/flex
 - > Commercial: office/retail
 - > Residential (North area)
 - > Urban farming
 - > Interim/transitional
 - > Historic/Cultural destinations
 - > Parks/open space
 - > Recreational facilities

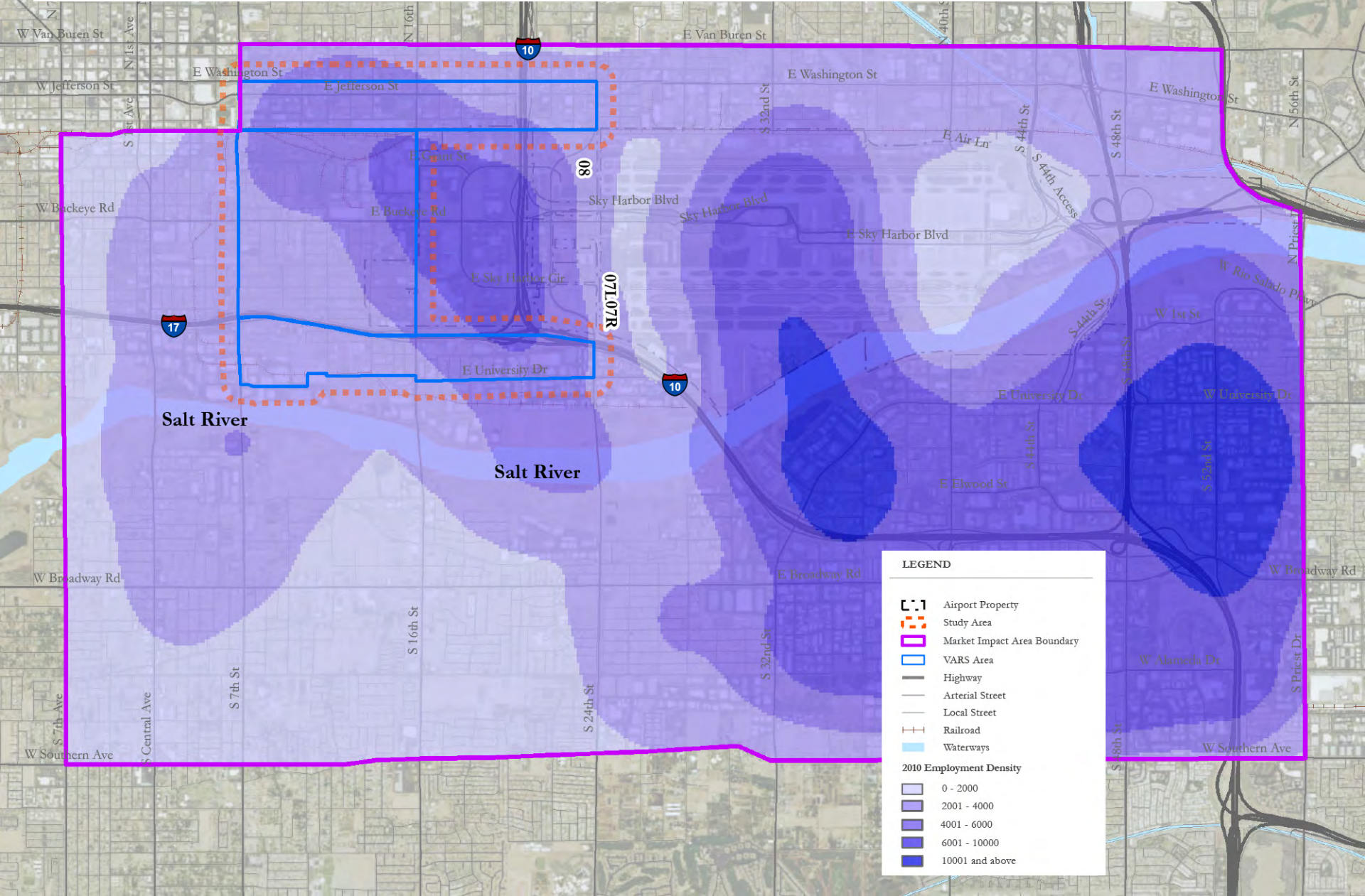
Land Use Management Model



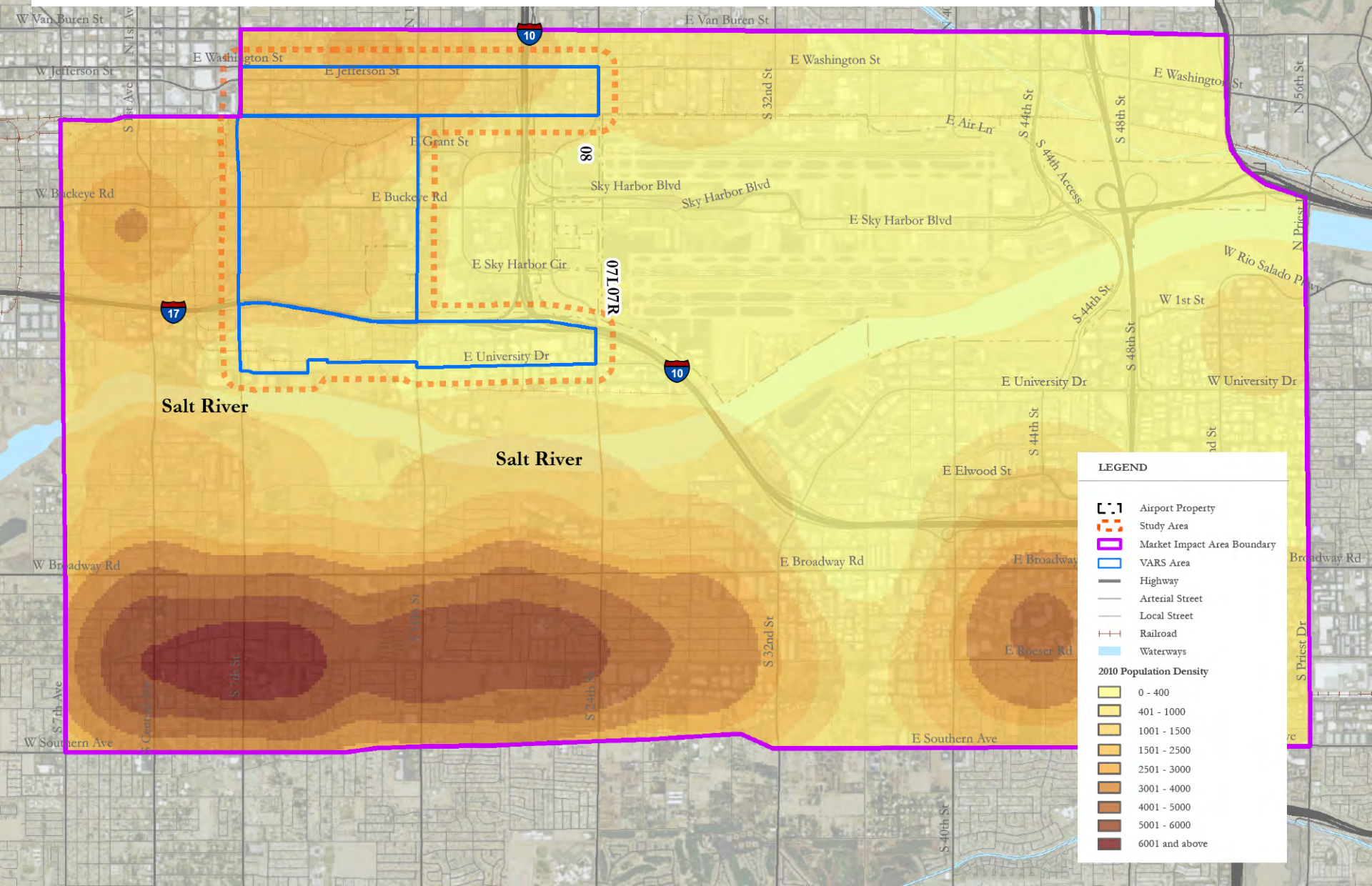
Market Study Area



Key Market Metrics—Employment Density



Key Market Metrics—Population Density

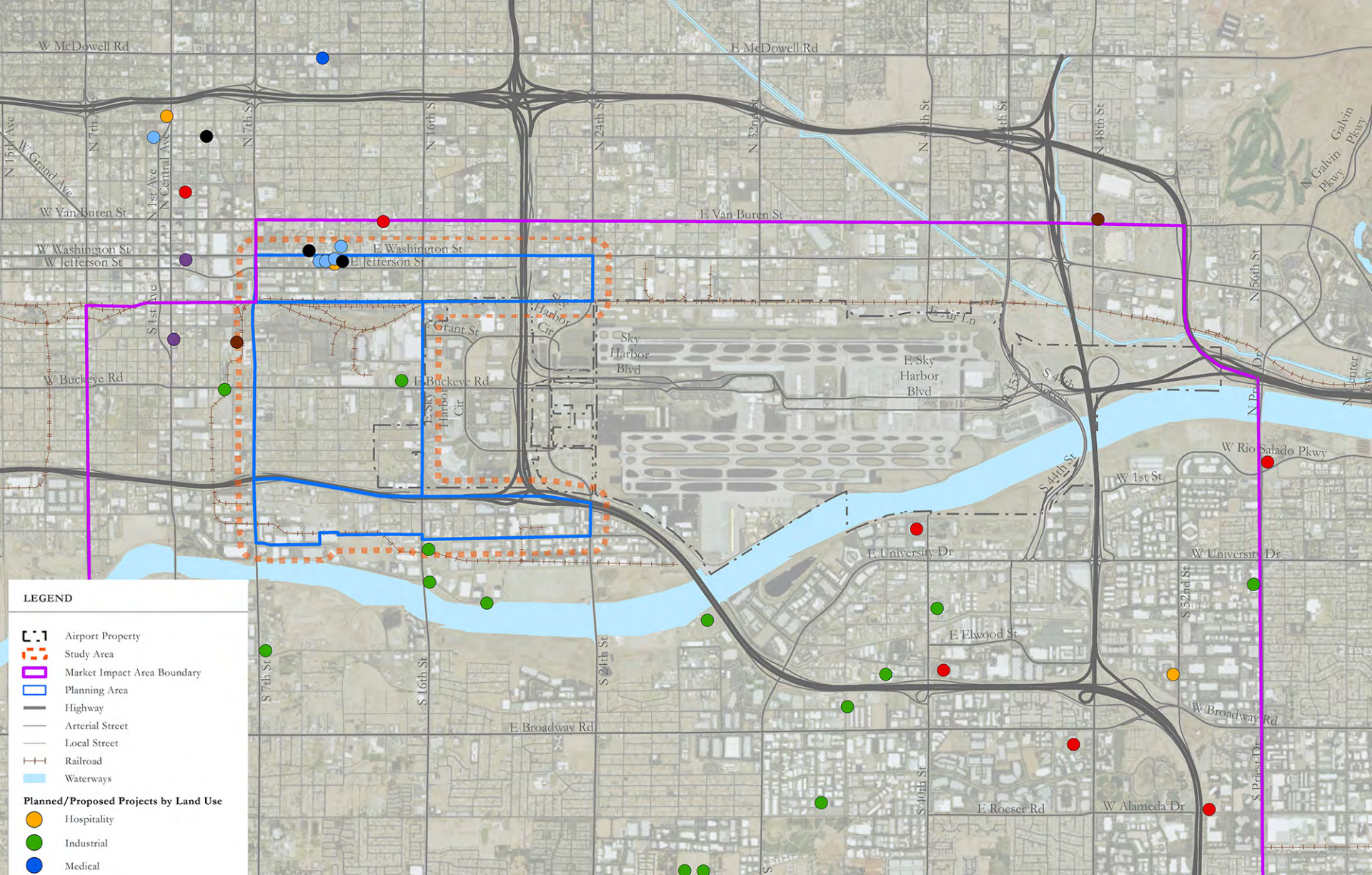


LEGEND

- Airport Property
- Study Area
- Market Impact Area Boundary
- VARS Area
- Highway
- Arterial Street
- Local Street
- Railroad
- Waterways

2010 Population Density

- 0 - 400
- 401 - 1000
- 1001 - 1500
- 1501 - 2500
- 2501 - 3000
- 3001 - 4000
- 4001 - 5000
- 5001 - 6000
- 6001 and above

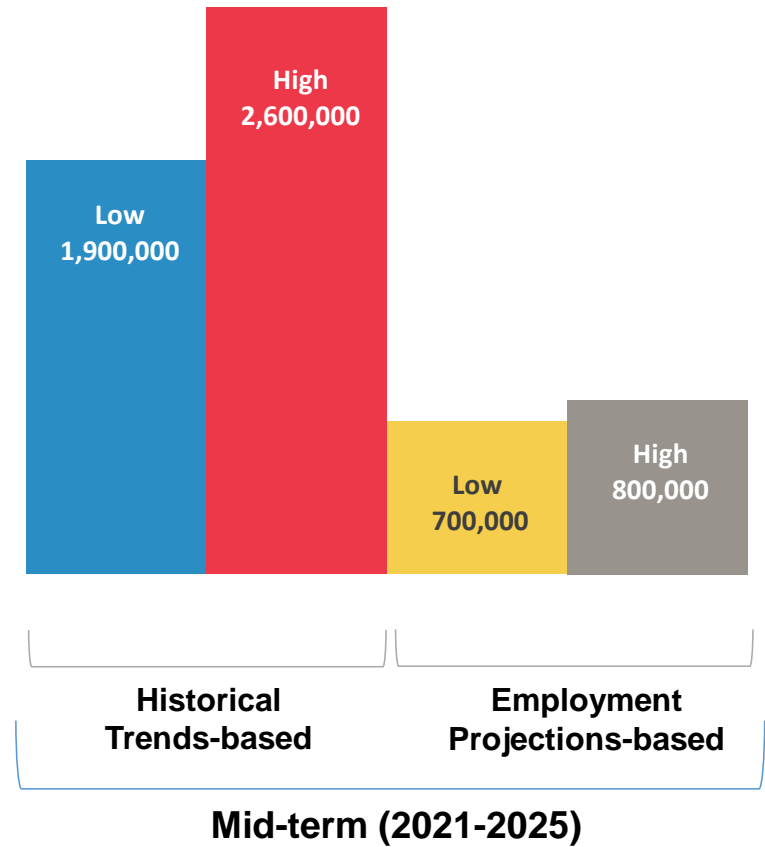
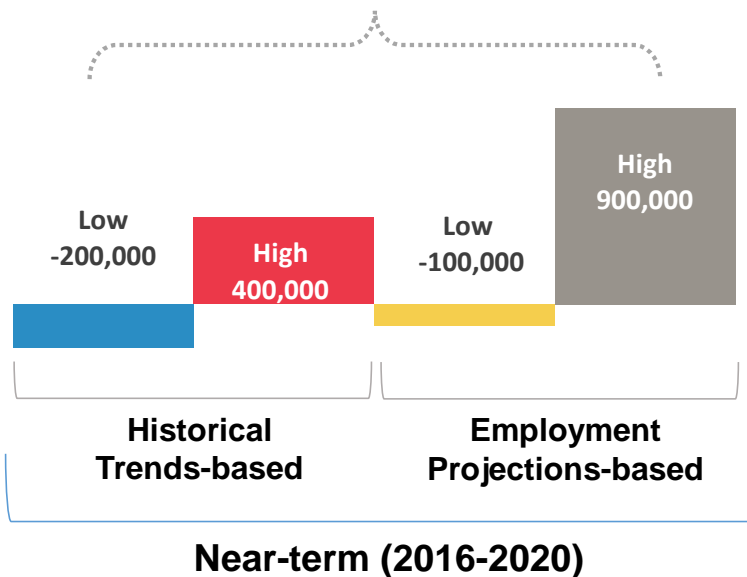


Planned/Proposed Projects

Industrial

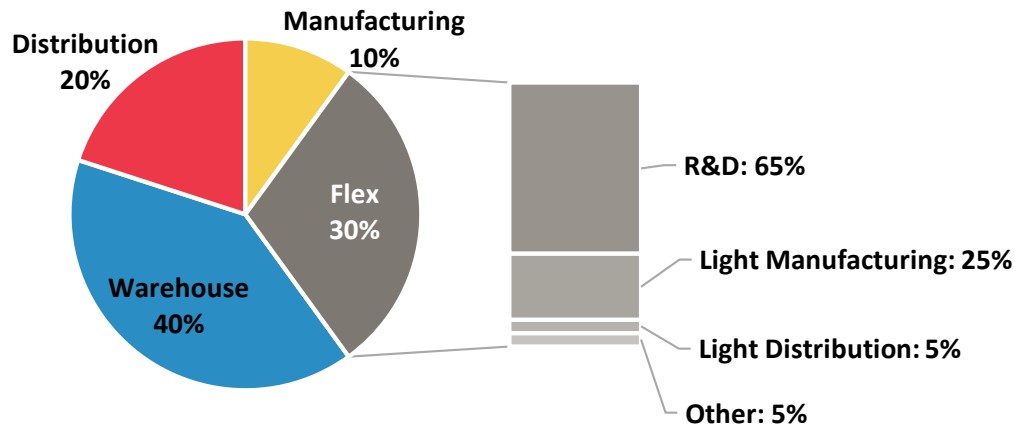
Projected Demand (in square feet)

Modified near-term demand due to approx. 2.3 MSF total of proposed, under construction or newly delivered industrial space in 2016.

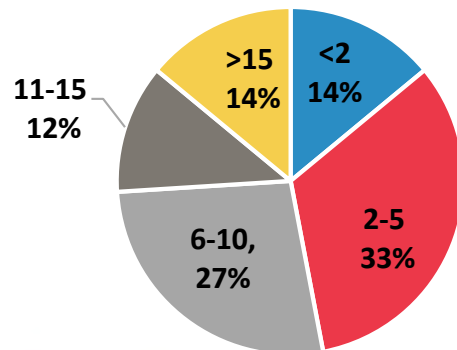


Industrial

Types of Industrial Space



Land Sizes (acres)



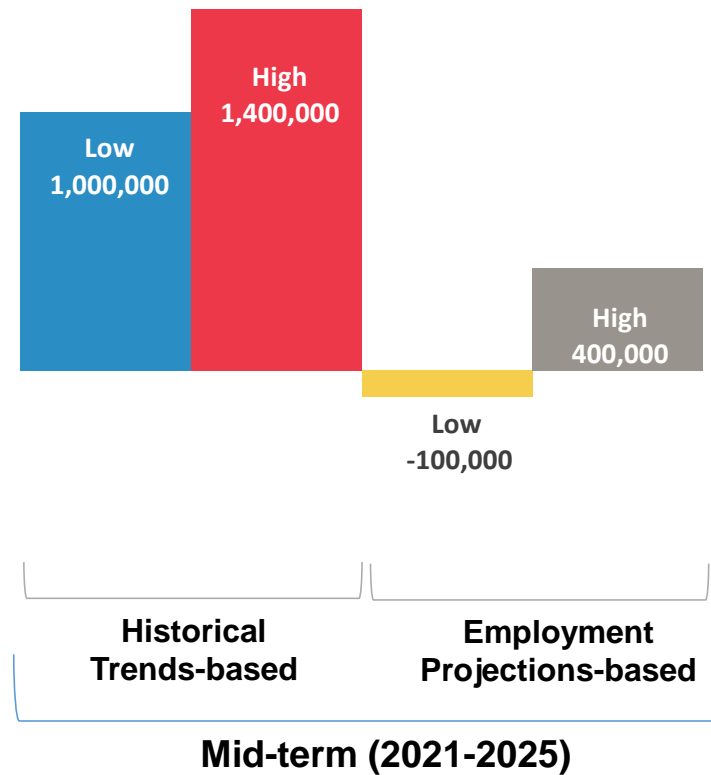
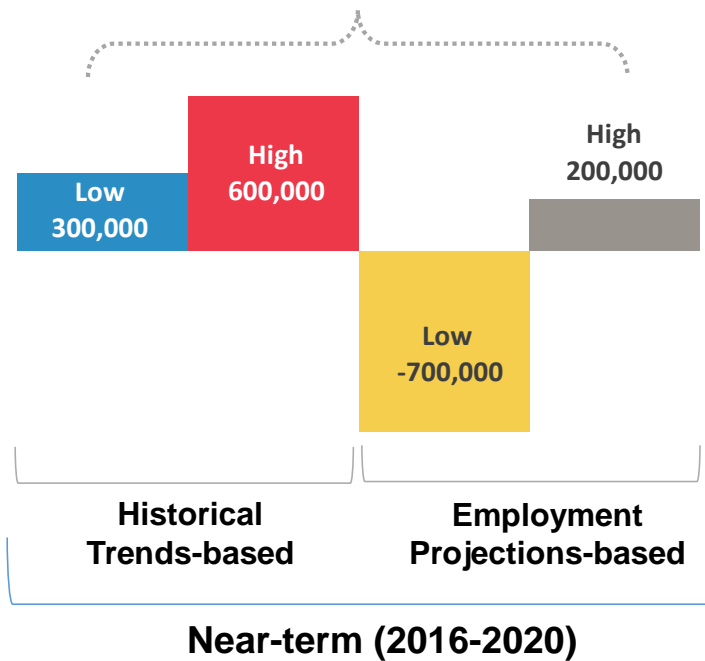
Industrial

- > Opportunities
 - > Proximity to:
 - > Transportation
 - > Downtown/Biomed campus
 - > Sky Harbor
 - > Compatible with airport noise levels/height restrictions
 - > R&D/light manufacturing for target growth industries
- > Constraints
 - > 2.3 MSF currently in development or proposed for market area—absorbs near-term demand
 - > Limited availability of desired parcel sizes
 - > Competitive land inventory in/nearby market area

Office

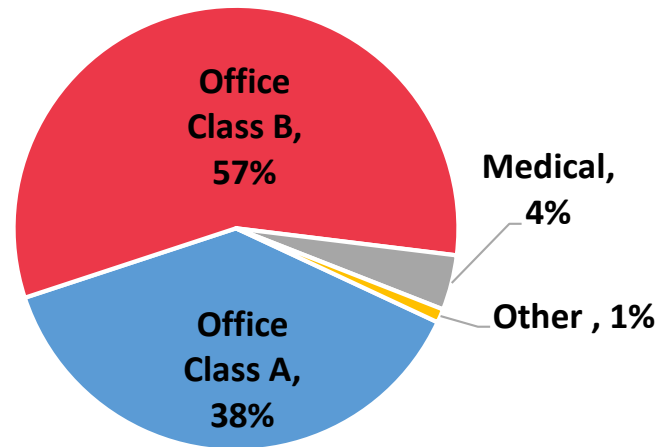
Projected Demand (in square feet)

Modified near-term demand due to approx. 750,000 SF total of proposed office space in 2016.

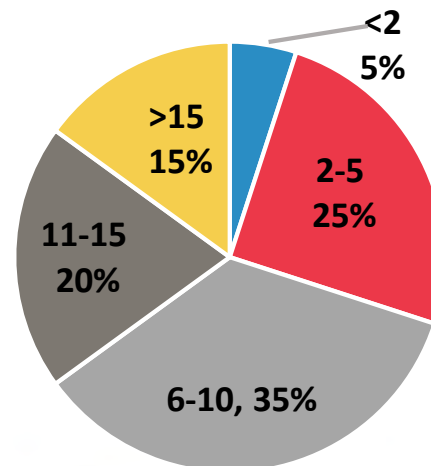


Office

Types of Office Space



Land Sizes (acres)



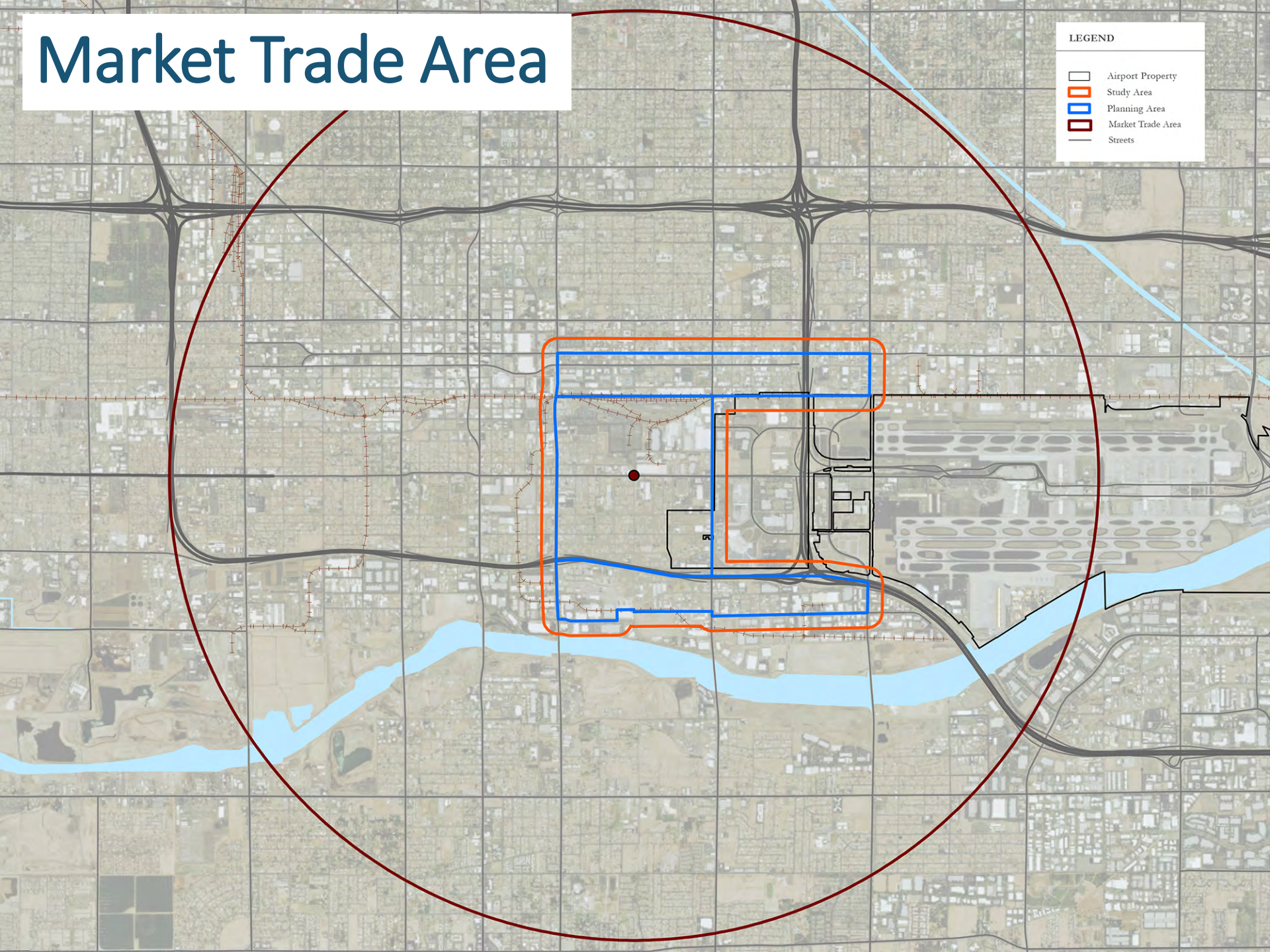
Office

- > Opportunities
 - > Proximity to:
 - > Light Rail
 - > Downtown/Warehouse District
 - > Sky Harbor
 - > Compatible with airport noise levels/height restrictions
 - > Potential to provide suburban-style format (large floor plates)
- > Constraints
 - > Approximately 750,000 SF currently proposed for market area – absorbs near-term demand
 - > Traditionally perceived as residential or transitional
 - > Other regional centers of gravity for office
 - > Limited availability of desired parcel sizes & amenities

Market Trade Area

LEGEND

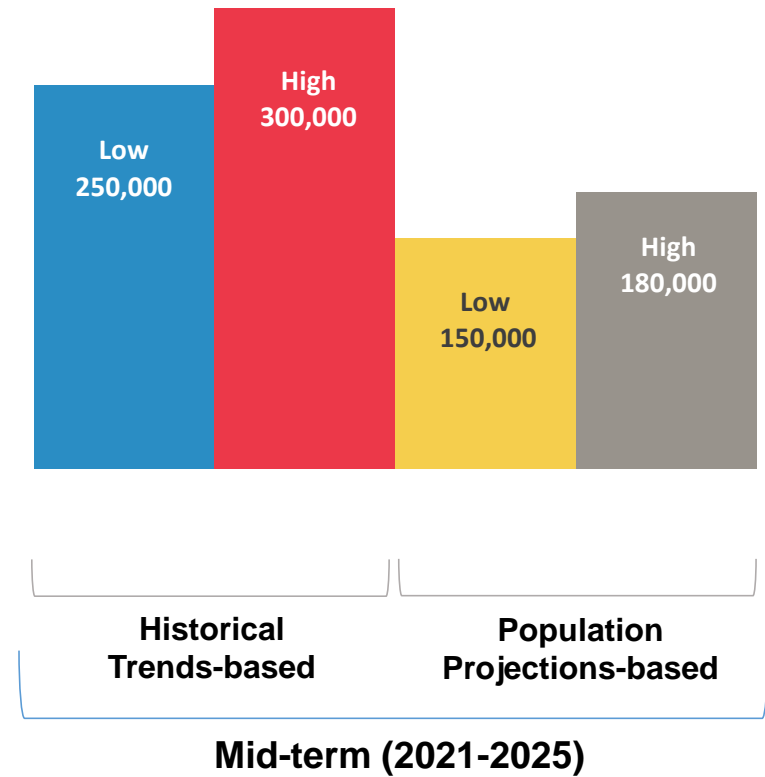
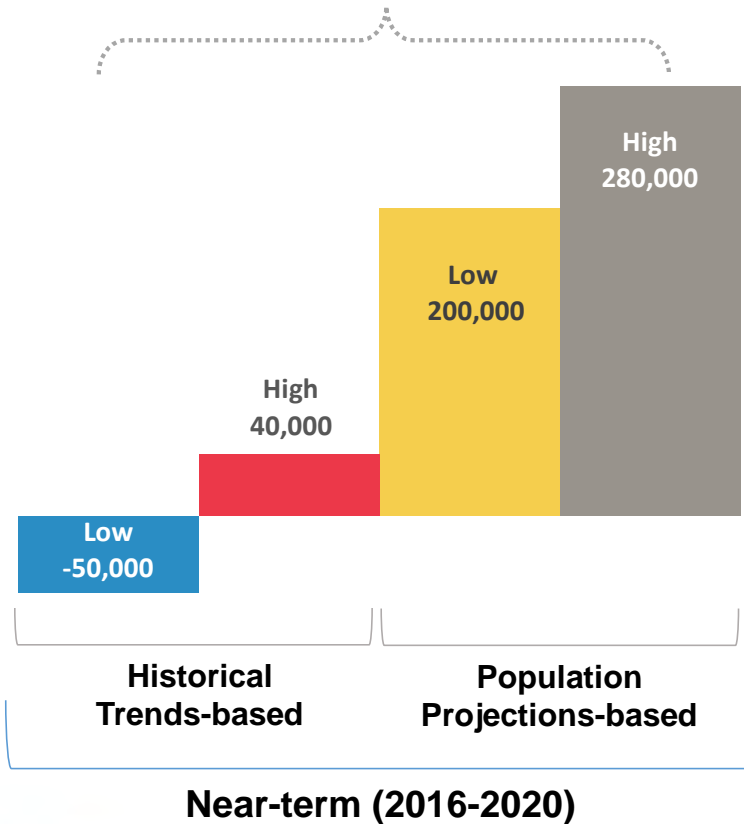
- Airport Property
- Study Area
- Planning Area
- Market Trade Area
- Streets



Retail

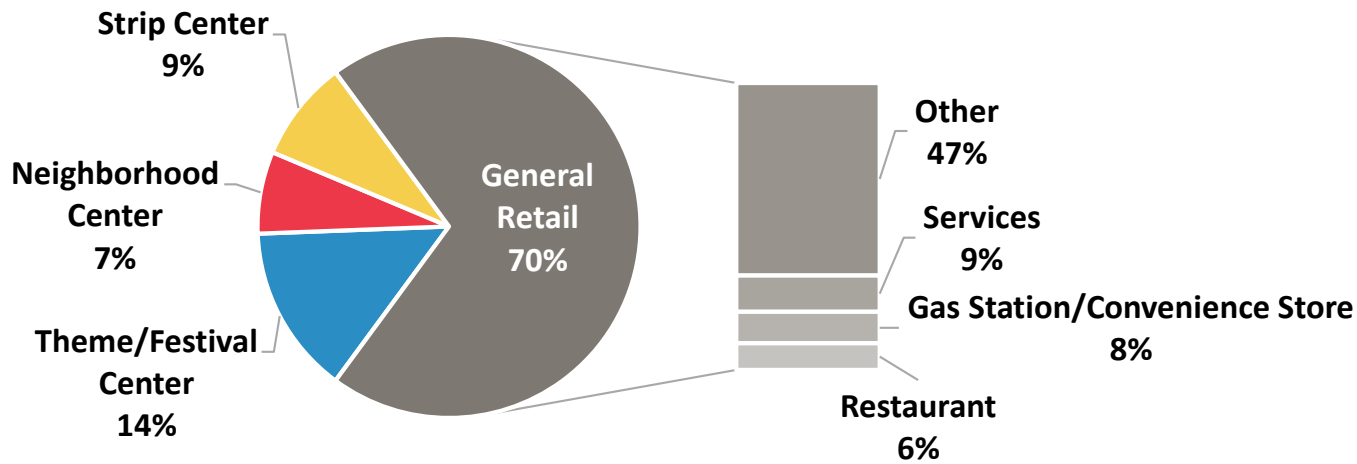
Projected Demand (in square feet)

Modified near-term demand due to approx. 100,000 SF total of proposed, under construction or newly delivered retail space in 2016.

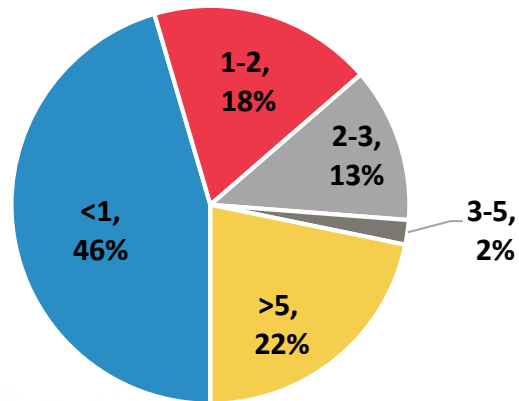


Retail

Types of Retail Space



Land Sizes (acres)



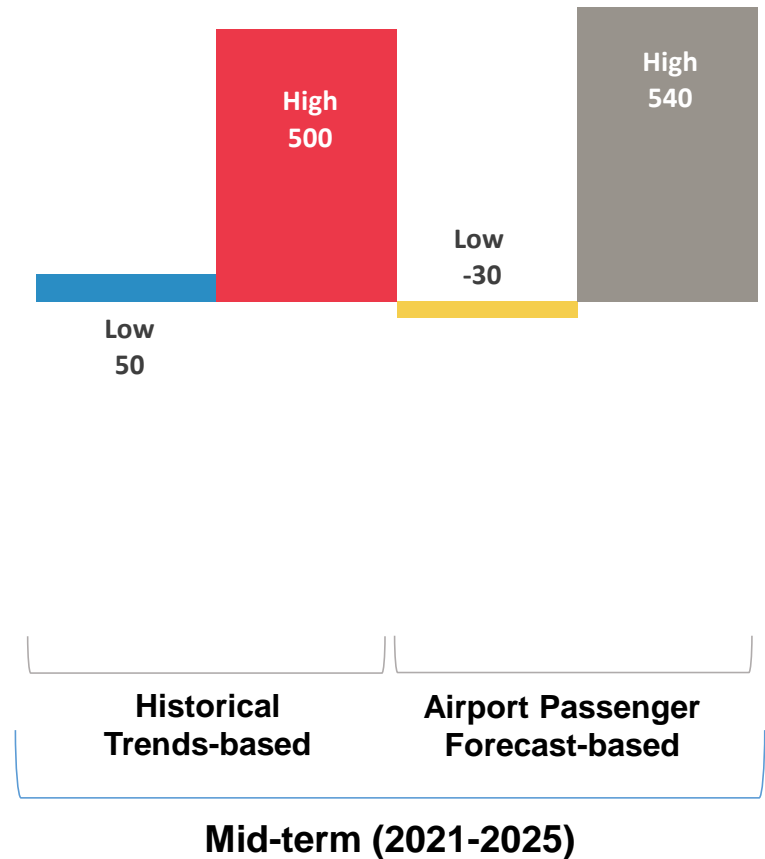
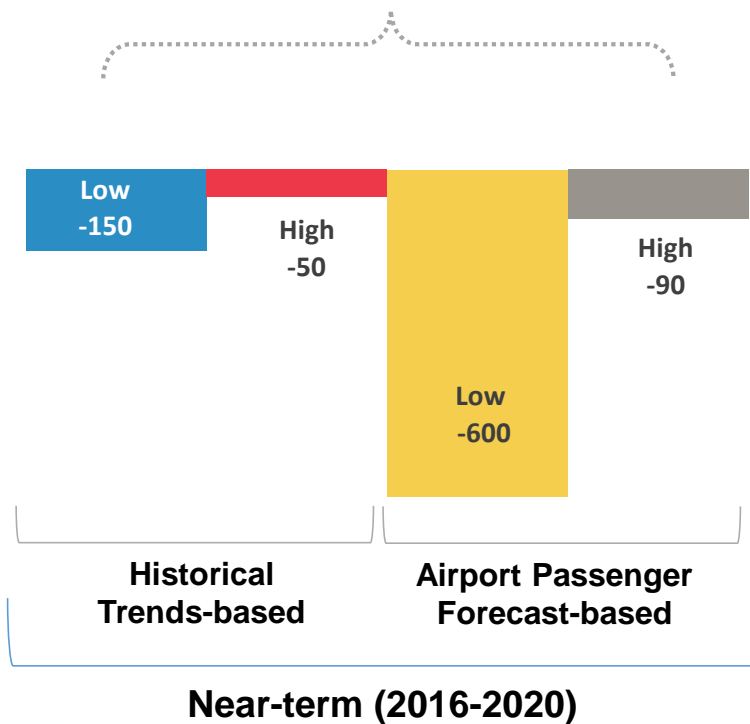
Retail

- > Opportunities
 - > Proximity to:
 - > Major transportation corridors and strong traffic volumes
 - > Robust employment centers and concentrations
 - > Growing downtown resident population
 - > Compatible with airport noise levels/height restrictions
 - > Smaller parcel sizes are compatible with convenience commercial development, such as limited service/fast casual restaurants
- > Constraints
 - > 100,000 SF currently in development or proposed for market area— absorbs near-term demand
 - > Limited demand for destination retail due to existing locations and insufficient households and household incomes to meet retailer thresholds
 - > Impact of growing popularity and use of online retail/deliveries

Hotel

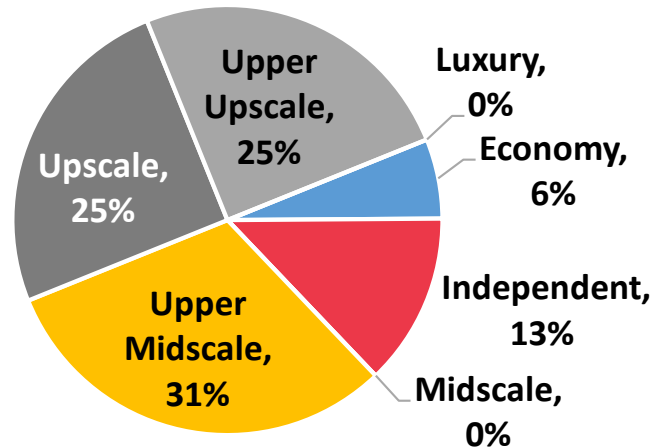
Projected Demand (in rooms)

Modified near-term demand due to approx. 540 hotel rooms in 4 total properties proposed or under construction in 2016.

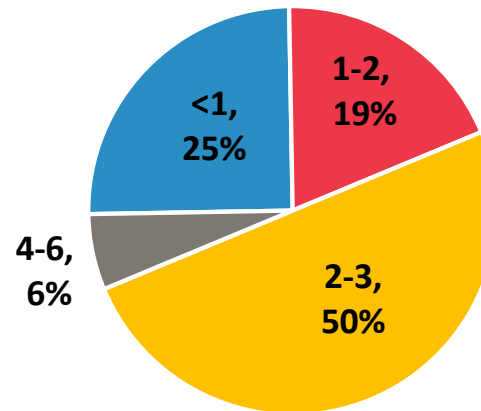


Hotel

Types of Hotel Properties



Land Sizes (acres)



What do these mean?

Types of hotels are classified this way:

- 1) Whether they are part of a hotel chain or not (independent).
- 2) If part of a chain, then sorted by the general price point of nightly room rates.

Examples of Hotel Types:

Economy – Red Roof Inn

Midscale – Best Western

Upper Midscale – Hampton Inn

Upscale – Courtyard Marriott

Upper Upscale – Westin

Hotel

> Opportunities

> Proximity to:

- > Sky Harbor
- > Downtown (venues, employment, campuses)
- > Transportation

> Compatible with airport noise levels/height restrictions

> Growth in airport passengers, downtown employment, population

> Constraints

> 540 rooms currently in development or proposed for market area

> Other nearby competitive locations/concentrations of hotel

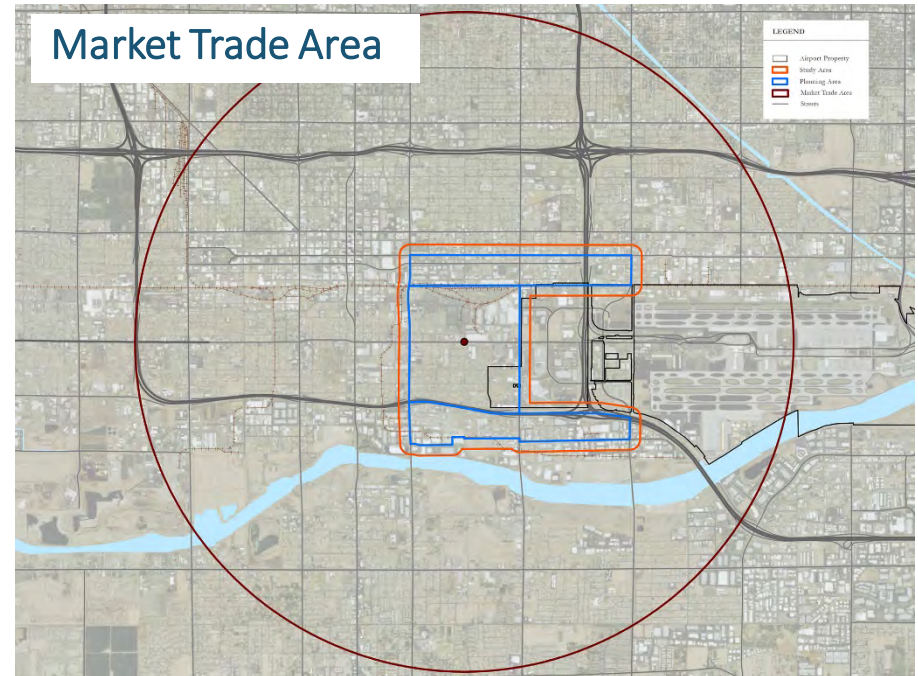
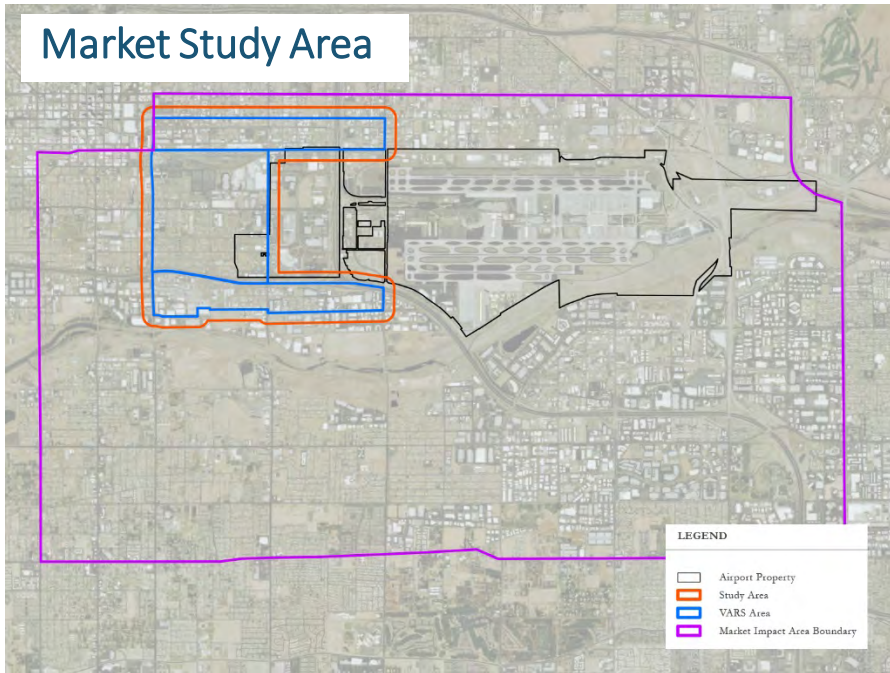
> Desired sites along transit more limited and perceptions of area

Mixed Use

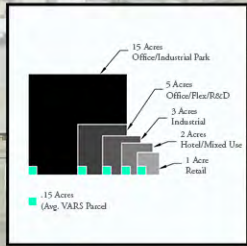
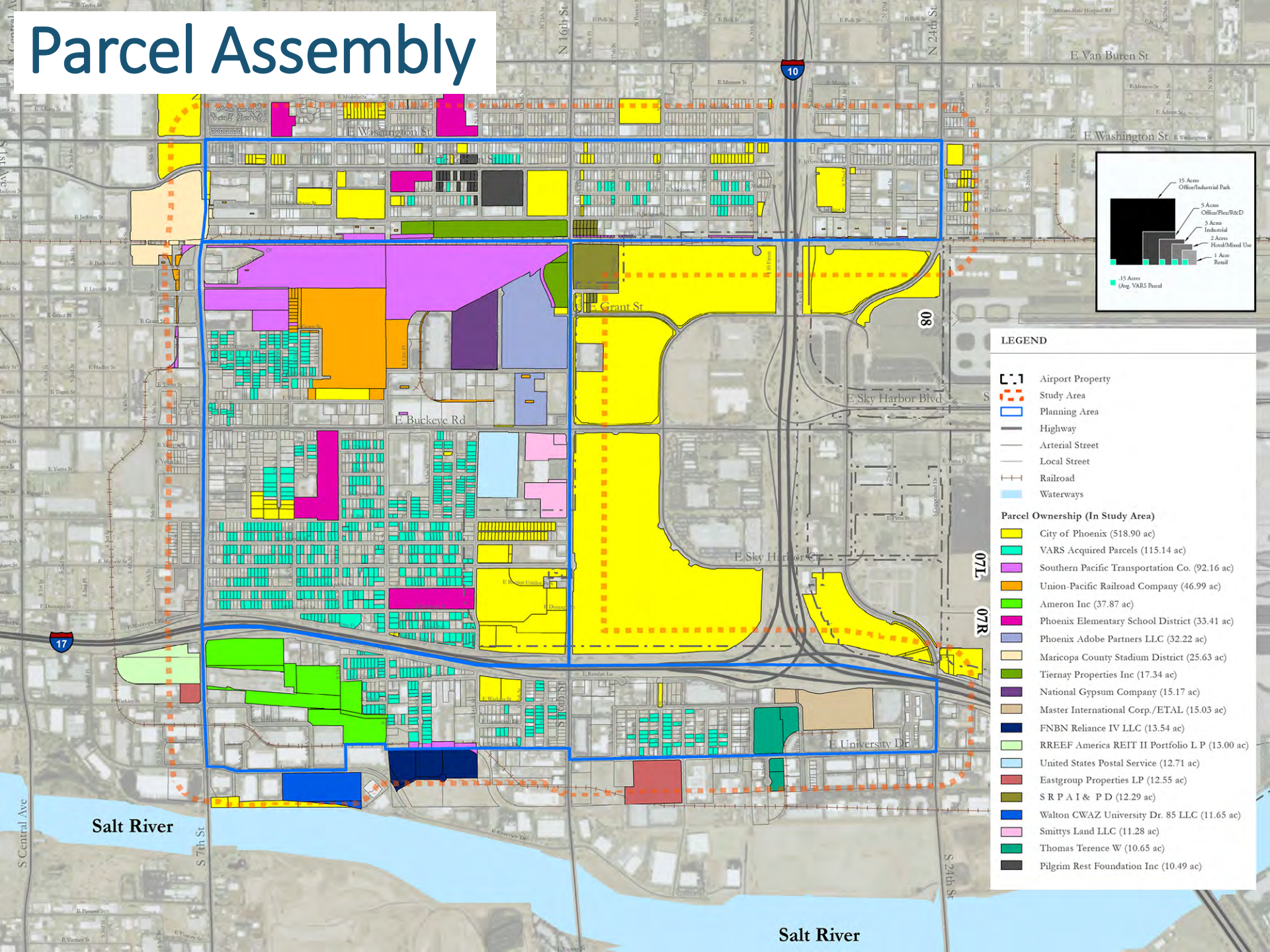
- > What is Mixed Use?
- > Within 3-mile trade area, what % of multi-family units are located in mixed use developments?
 - > Nearly 25% of existing units
 - > Nearly 85% of units currently proposed/under construction or already delivered in 1st quarter 2016 (“future units”)
- > Location within .3 miles of light rail station
- > Non-residential uses generally found on ground floor:
 - > commercial space (retail, restaurant, entertainment), live/work units, gallery/public spaces
- > Average building: 5 stories, developed on 2 acres
- > Mixed use type development already allowed in Northwest portion of Planning Area as part of TOD-1 overlay district



Demand Allocation



Parcel Assembly



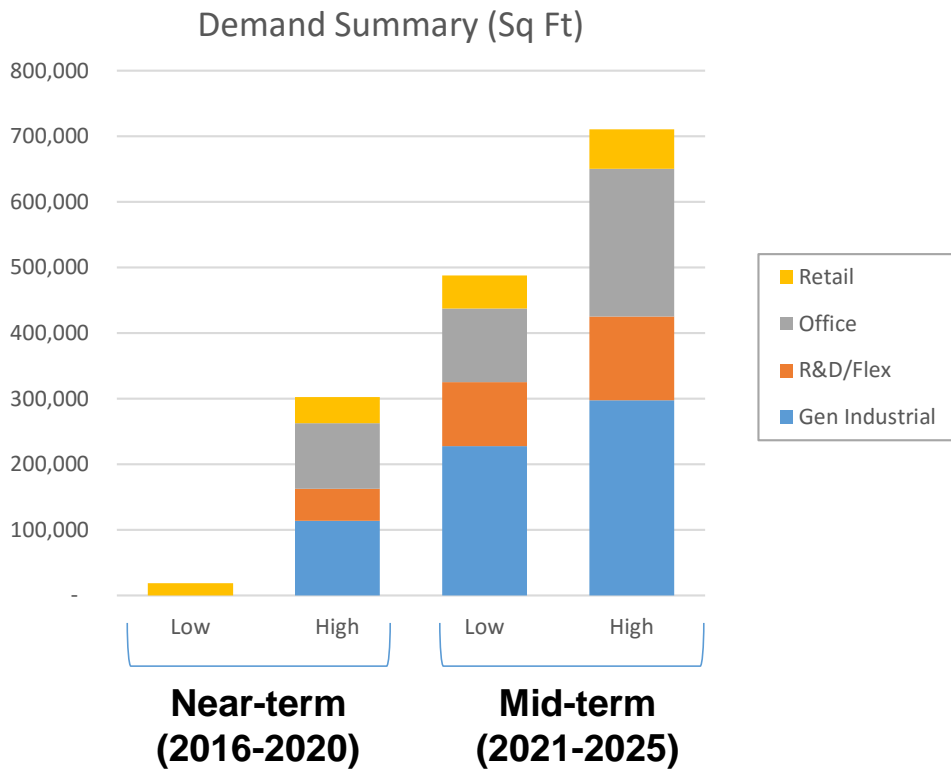
LEGEND

- Airport Property
- Study Area
- Planning Area
- Highway
- Arterial Street
- Local Street
- Railroad
- Waterways

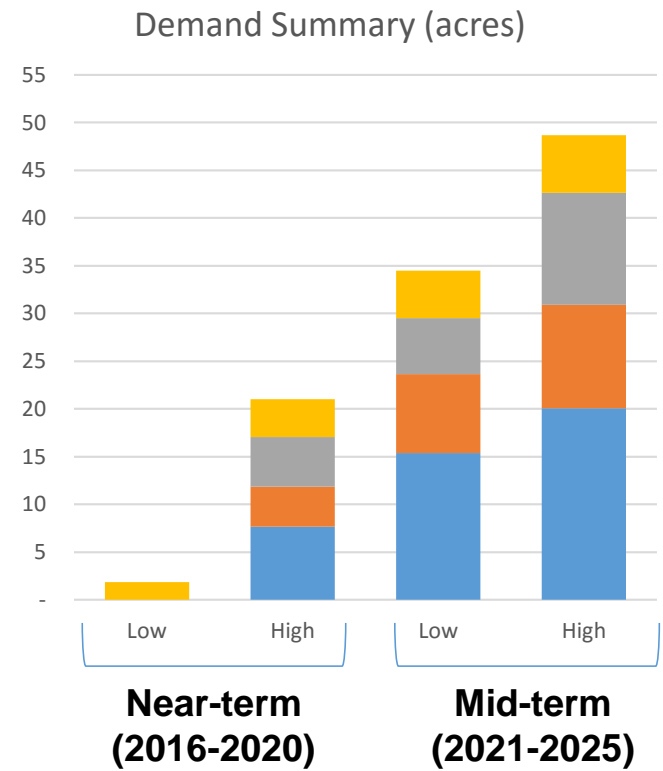
Parcel Ownership (In Study Area)

- City of Phoenix (518.90 ac)
- VARS Acquired Parcels (115.14 ac)
- Southern Pacific Transportation Co. (92.16 ac)
- Union-Pacific Railroad Company (46.99 ac)
- Ameron Inc (37.87 ac)
- Phoenix Elementary School District (33.41 ac)
- Phoenix Adobe Partners LLC (32.22 ac)
- Maricopa County Stadium District (25.63 ac)
- Tierny Properties Inc (17.34 ac)
- National Gypsum Company (15.17 ac)
- Master International Corp./ETAL (15.03 ac)
- FNBN Reliance IV LLC (13.54 ac)
- RREEF America REIT II Portfolio L P (13.00 ac)
- United States Postal Service (12.71 ac)
- Eastgroup Properties LP (12.55 ac)
- S R P A I & P D (12.29 ac)
- Walton CWAZ University Dr. 85 LLC (11.65 ac)
- Smittys Land LLC (11.28 ac)
- Thomas Terence W (10.65 ac)
- Pilgrim Rest Foundation Inc (10.49 ac)

Demand Allocation – Planning Area



130 hotel rooms also projected for mid-term (high scenario)

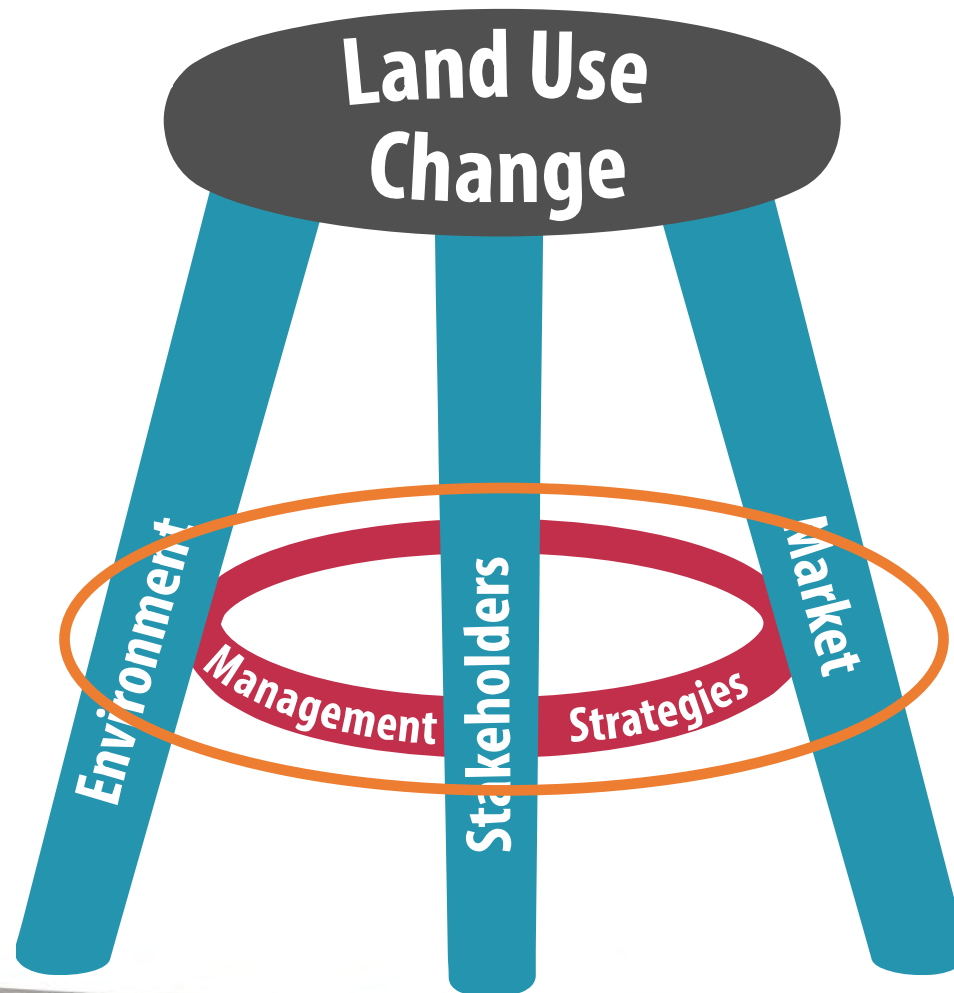


1.5 – 2 acres for hotel demand in mid-term (high scenario)

Land Use Benchmarking

- > Research & Development Parks
 - > University affiliations and proximity
 - > Require parcel assembly/infrastructure
 - > Multi-tenant, leverage skilled labor force
- > Urban Agriculture/Restaurant Incubator
 - > Greenhouses/shipping containers
 - > Support local food movement
 - > Potential to reduce food desert
 - > Opportunity for food industry entrepreneurs
- > Artisan/Maker Space
 - > Potential adaptation/reuse of community/industrial space
 - > Generally non-profit/membership based – shared resources/equipment

Land Use Management Model



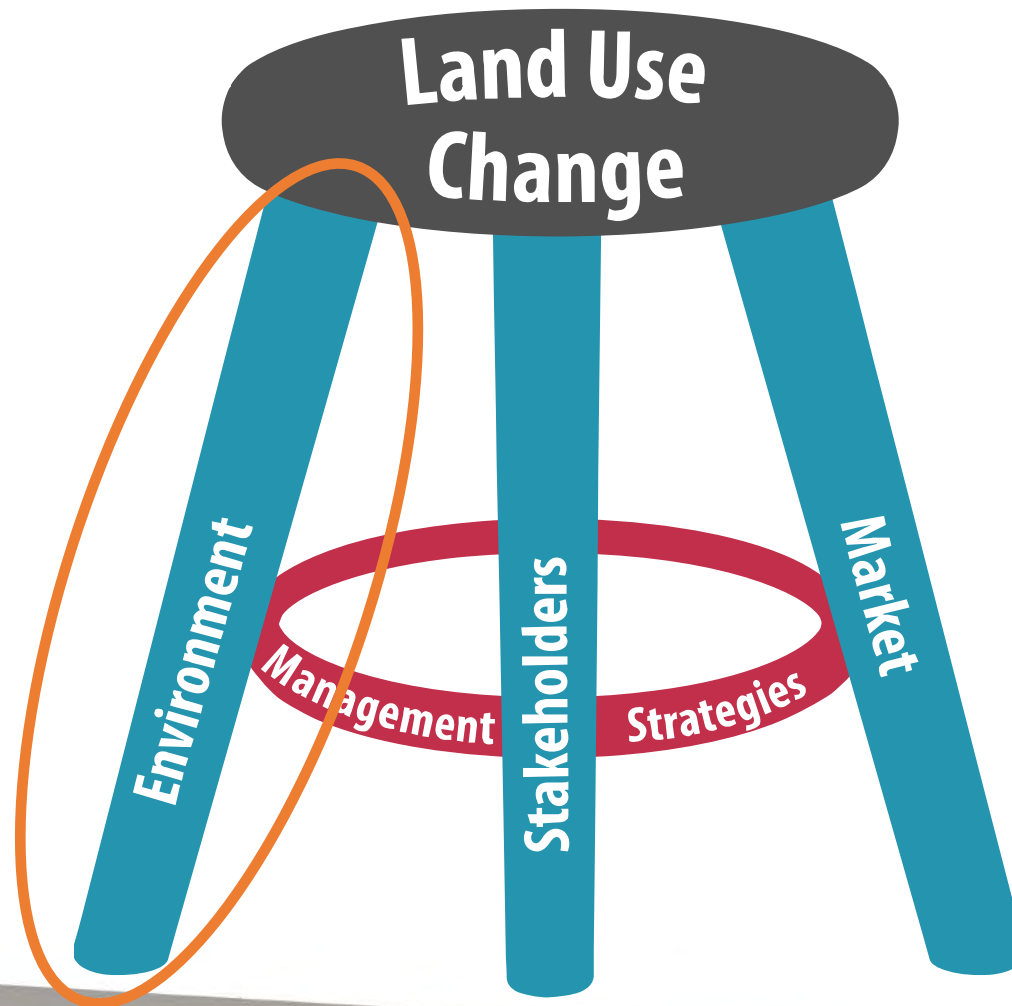
Strategy Benchmarking

- > Informal Uses
 - > Open space
 - > Pocket park
 - > Dog park
 - > Community garden
 - > Pop-up city: programmed events/temporary venues
 - > Farmers Market
 - > Food Truck Rodeo
 - > Adaptive Re-Use of Temporary Space (A.R.T.S.) Program
- > Vacant Lot Programs
 - > Land bank
 - > Parcel assembly
 - > Maintain to own

Strategy Benchmarking

- > Zoning
 - > Planned Unit Developments
 - > Overlay Districts
 - > Special Planning Districts (Design Guidelines)
- > Tax Incentives
- > Requests for Proposals for Development
- > Cultural Resource & Heritage Programs

Land Use Management Model



Environment: Study Area Metrics

> Opportunities

- > Infrastructure
- > Planned Projects
- > Incentive Zones
- > Parcel Assembly

> Constraints

- > Zoning/Deed Restrictions
- > Neighboring Parcels
- > Environmental Overview

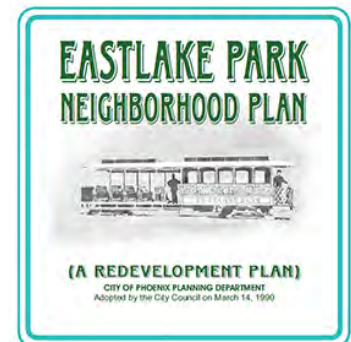
Existing Plans Review

- > PlanPHX
- > Reinvent PHX
- > Eastlake Park Neighborhood Plan
- > Nuestro Barrio Neighborhood Plan
- > Rio Salado Redevelopment Study Area
- > Booker T. Washington Redevelopment Area
- > Special Redevelopment Area
- > Sky Harbor Center Redevelopment Area
- > HOPE VI and Choice Neighborhoods Program
- > Green Valley Neighborhood
- > Cuatro Milpas
- > Central City South Quality of Life Plan

Central City South at a Glance



Inventory, Assets and Existing Conditions
October 2015



Resources

- > Water/Utility Infrastructure
- > Airport Documents
- > CNRP/VARs
- > Area Planning and Land Use Codes
- > Environmental
- > Land Development Inquiries
- > Valley Metro Planning
- > ADOT Passenger Rail Planning
- > MAG Transportation Planning

Access to Transportation

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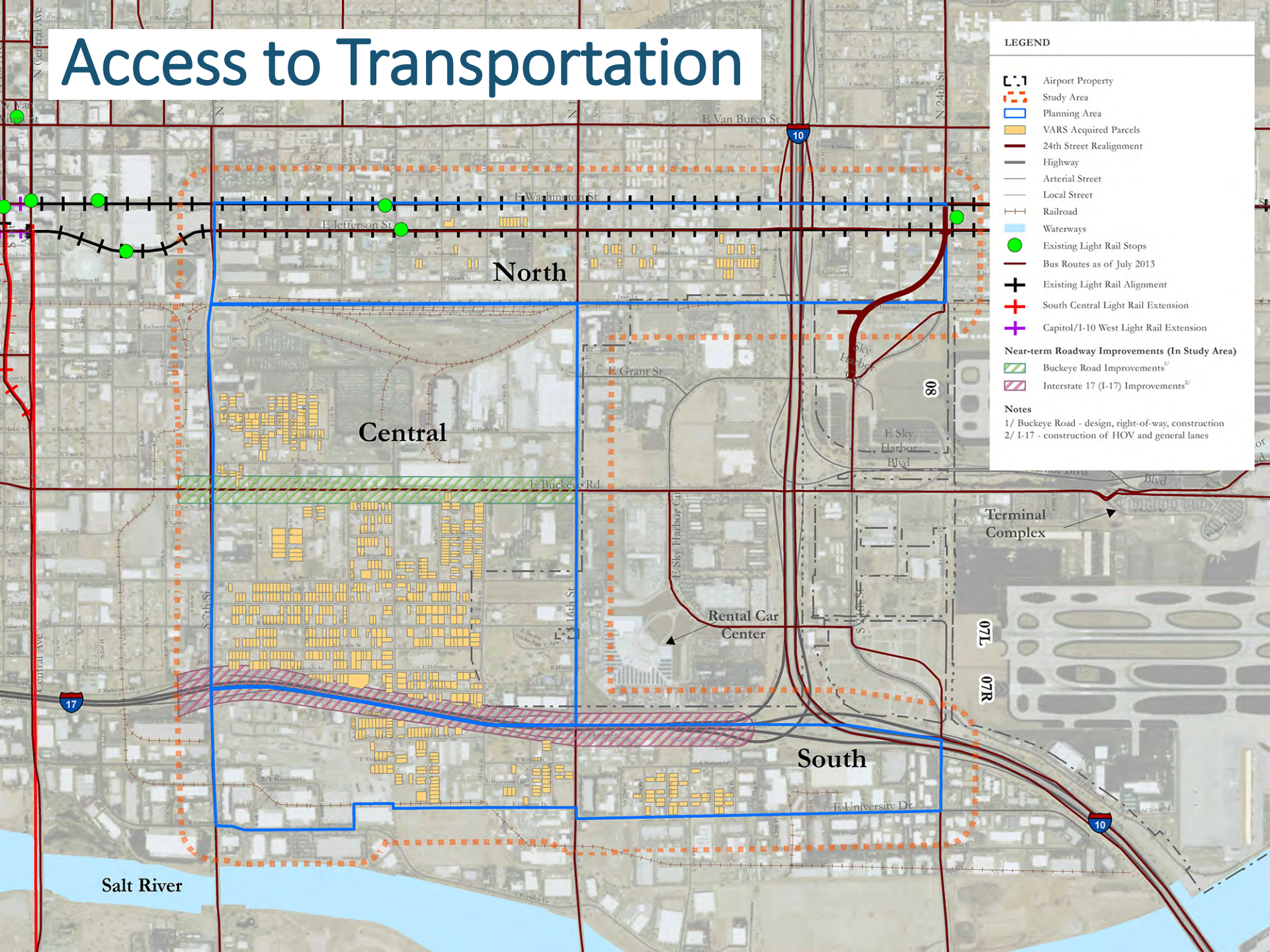
- Airport Property
- Study Area
- Planning Area
- VARS Acquired Parcels
- 24th Street Realignment
- Highway
- Arterial Street
- Local Street
- Railroad
- Waterways
- Existing Light Rail Stops
- Bus Routes as of July 2013
- Existing Light Rail Alignment
- South Central Light Rail Extension
- Capitol/I-10 West Light Rail Extension

Near-term Roadway Improvements (In Study Area)

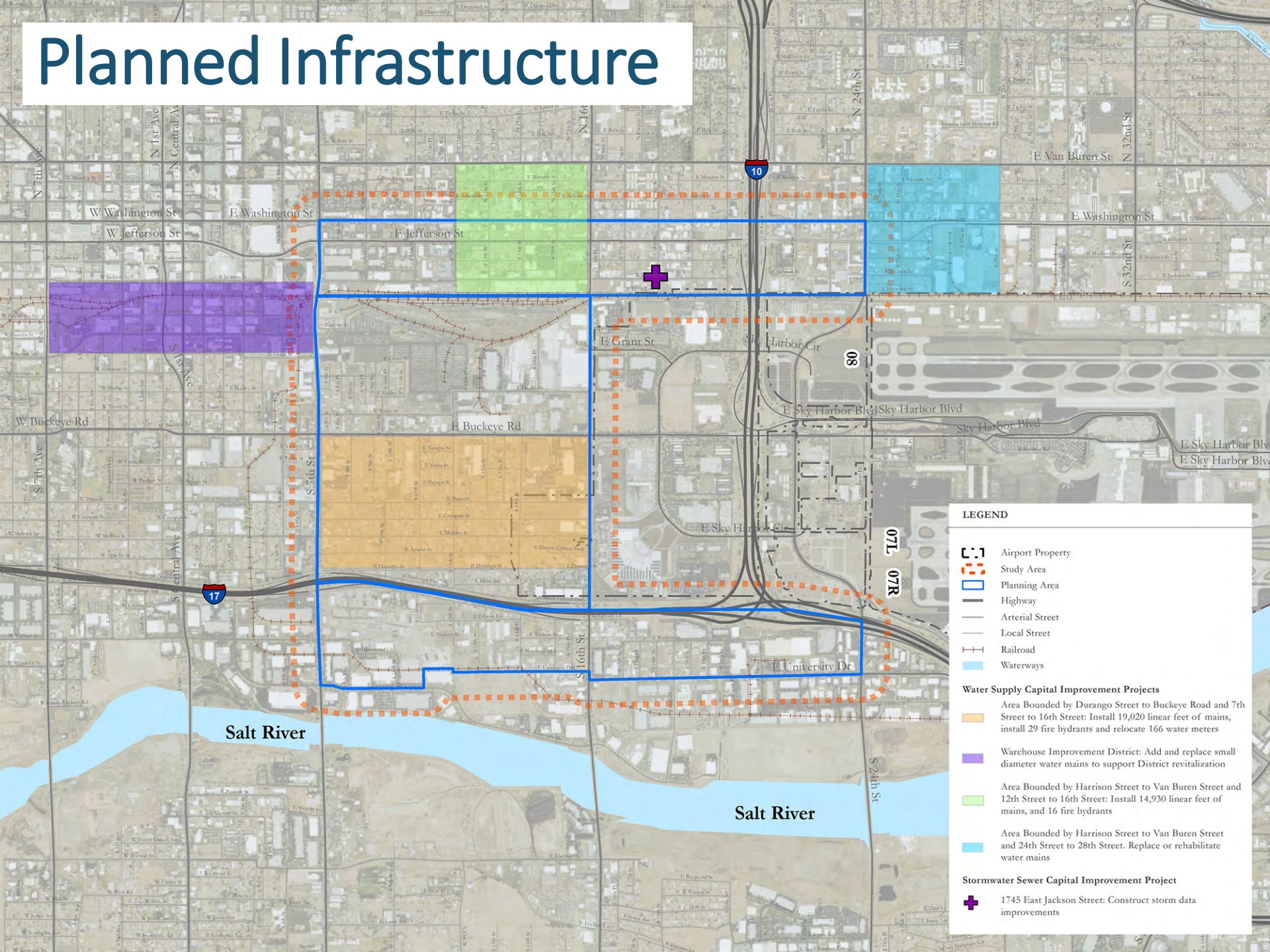
- Buckeye Road Improvements^{1/}
- Interstate 17 (I-17) Improvements^{2/}

Notes

- ^{1/} Buckeye Road - design, right-of-way, construction
- ^{2/} I-17 - construction of HOV and general lanes



Planned Infrastructure



LEGEND

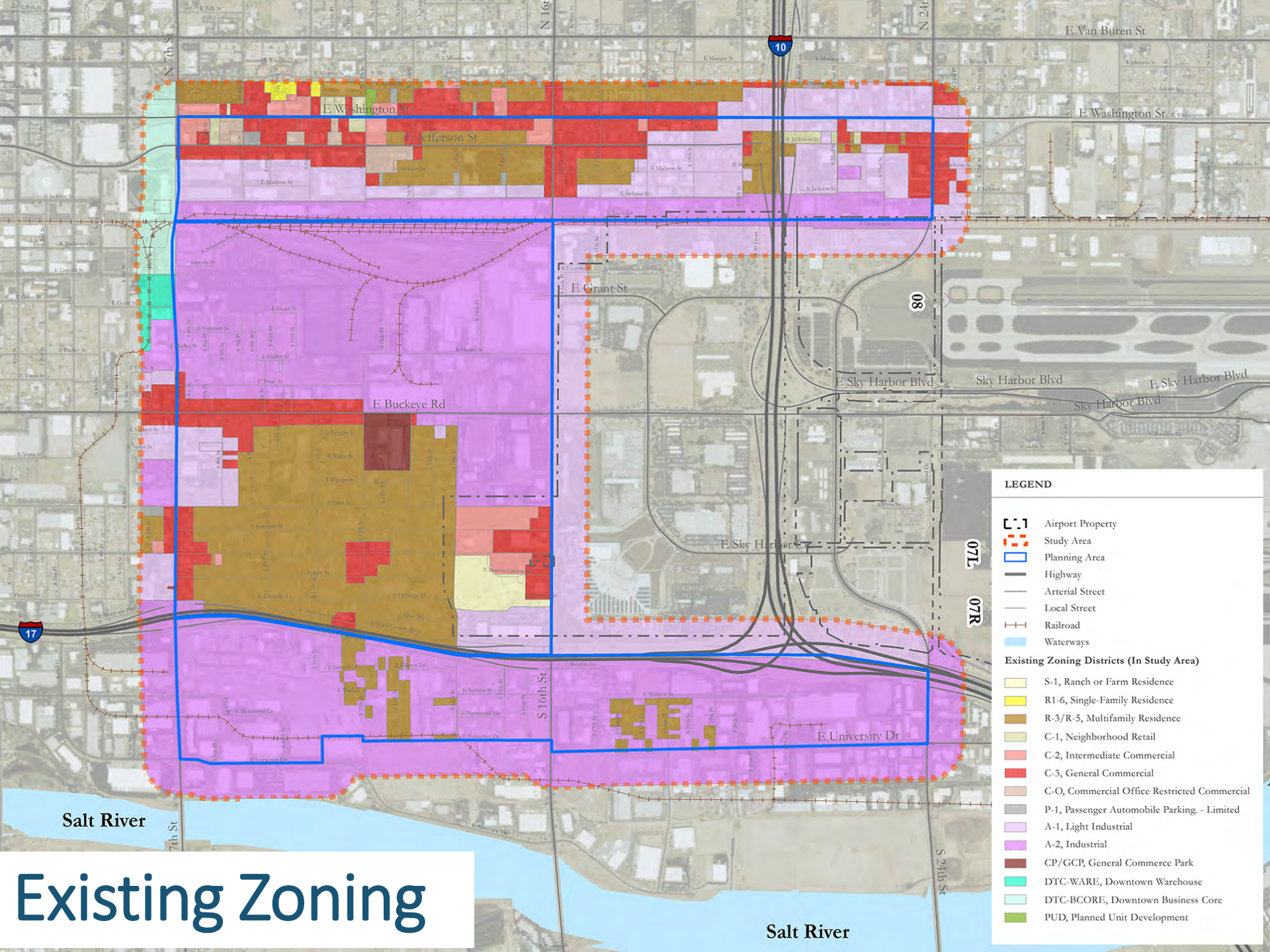
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Water Supply Capital Improvement Projects

- Area Bounded by Durango Street to Buckeye Road and 7th Street to 16th Street: Install 19,020 linear feet of mains, install 29 fire hydrants and relocate 166 water meters
- Warehouse Improvement District: Add and replace small diameter water mains to support District revitalization
- Area Bounded by Harrison Street to Van Buren Street and 12th Street to 16th Street: Install 14,930 linear feet of mains, and 16 fire hydrants
- Area Bounded by Harrison Street to Van Buren Street and 24th Street to 28th Street. Replace or rehabilitate water mains

Stormwater Sewer Capital Improvement Project

- 1745 East Jackson Street: Construct storm data improvements



Existing Zoning

LEGEND

- Airport Property
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- Planning Area
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Existing Zoning Districts (In Study Area)

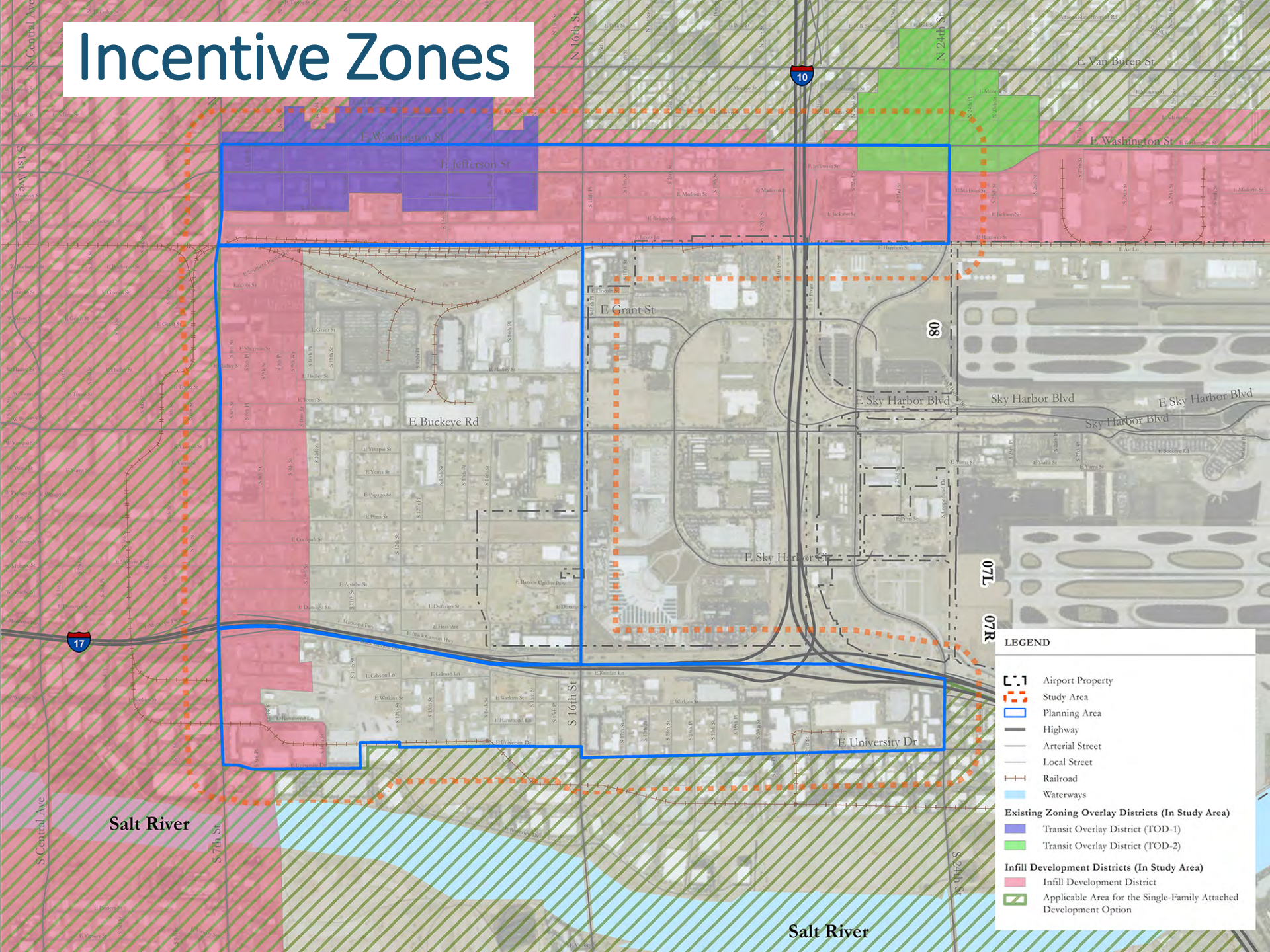
- S-1, Ranch or Farm Residence
- R1-6, Single-Family Residence
- R-3/R-5, Multifamily Residence
- C-1, Neighborhood Retail
- C-2, Intermediate Commercial
- C-3, General Commercial
- C-O, Commercial Office Restricted Commercial
- P-1, Passenger Automobile Parking - Limited
- A-1, Light Industrial
- A-2, Industrial
- CP/GCP, General Commerce Park
- DTC-WARE, Downtown Warehouse
- DTC-BCORE, Downtown Business Core
- PUD, Planned Unit Development

07L
07R

Salt River

Salt River

Incentive Zones



LEGEND

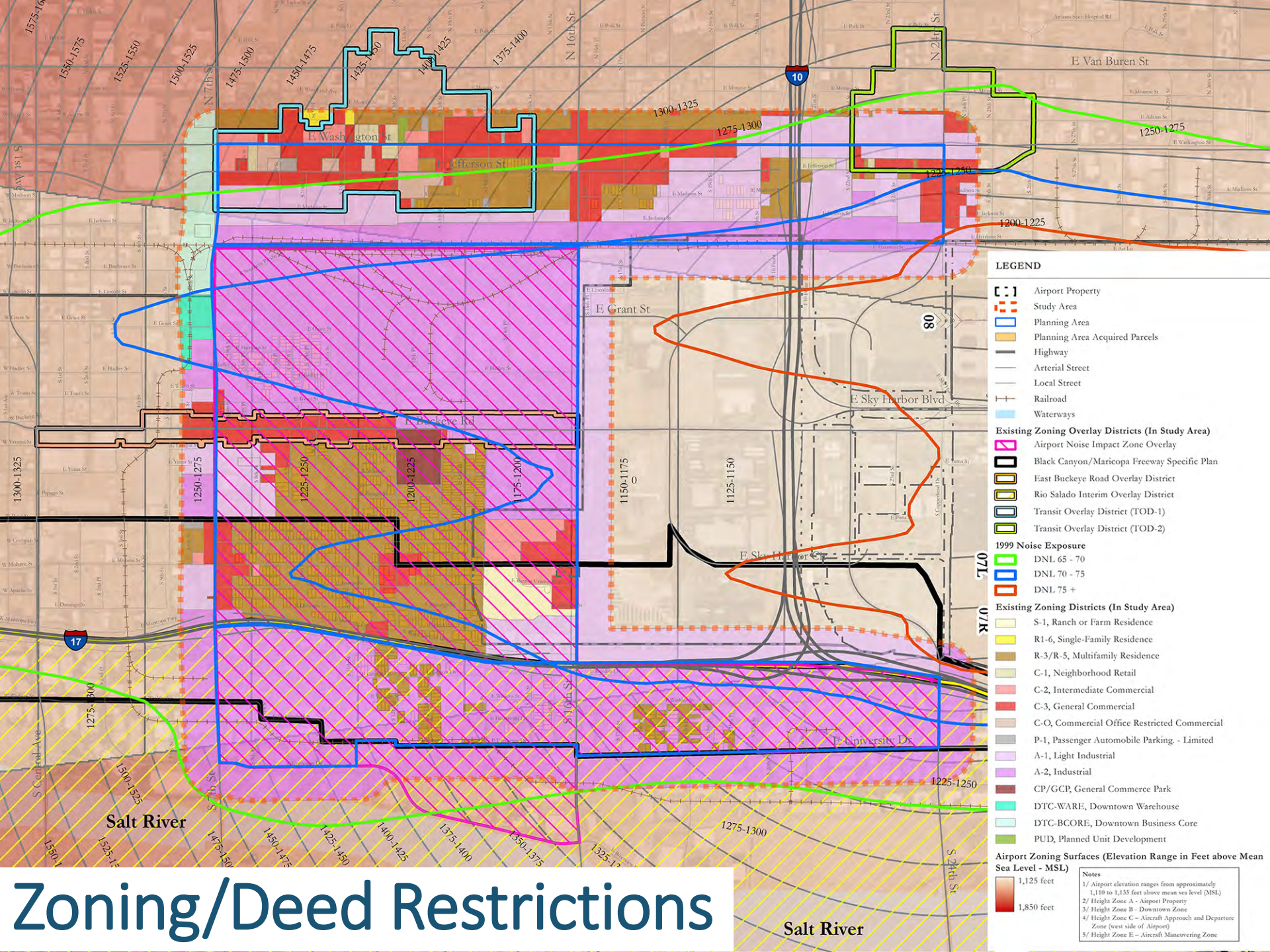
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Existing Zoning Overlay Districts (In Study Area)

- Transit Overlay District (TOD-1)
- Transit Overlay District (TOD-2)

Infill Development Districts (In Study Area)

- Infill Development District
- Applicable Area for the Single-Family Attached Development Option



LEGEND

- Airport Property
- Study Area
- Planning Area
- Planning Area Acquired Parcels
- Highway
- Arterial Street
- Local Street
- Railroad
- Waterways

Existing Zoning Overlay Districts (In Study Area)

- Airport Noise Impact Zone Overlay
- Black Canyon/Maricopa Freeway Specific Plan
- East Buckeye Road Overlay District
- Rio Salado Interim Overlay District
- Transit Overlay District (TOD-1)
- Transit Overlay District (TOD-2)

1999 Noise Exposure

- DNL 65 - 70
- DNL 70 - 75
- DNL 75 +

Existing Zoning Districts (In Study Area)

- S-1, Ranch or Farm Residence
- R1-6, Single-Family Residence
- R-3/R-5, Multifamily Residence
- C-1, Neighborhood Retail
- C-2, Intermediate Commercial
- C-3, General Commercial
- C-O, Commercial Office Restricted Commercial
- P-1, Passenger Automobile Parking - Limited
- A-1, Light Industrial
- A-2, Industrial
- CP/GCP, General Commerce Park
- DTC-WARE, Downtown Warehouse
- DTC-CORE, Downtown Business Core
- PUD, Planned Unit Development

Airport Zoning Surfaces (Elevation Range in Feet above Mean Sea Level - MSL)

- 1,125 feet
- 1,850 feet

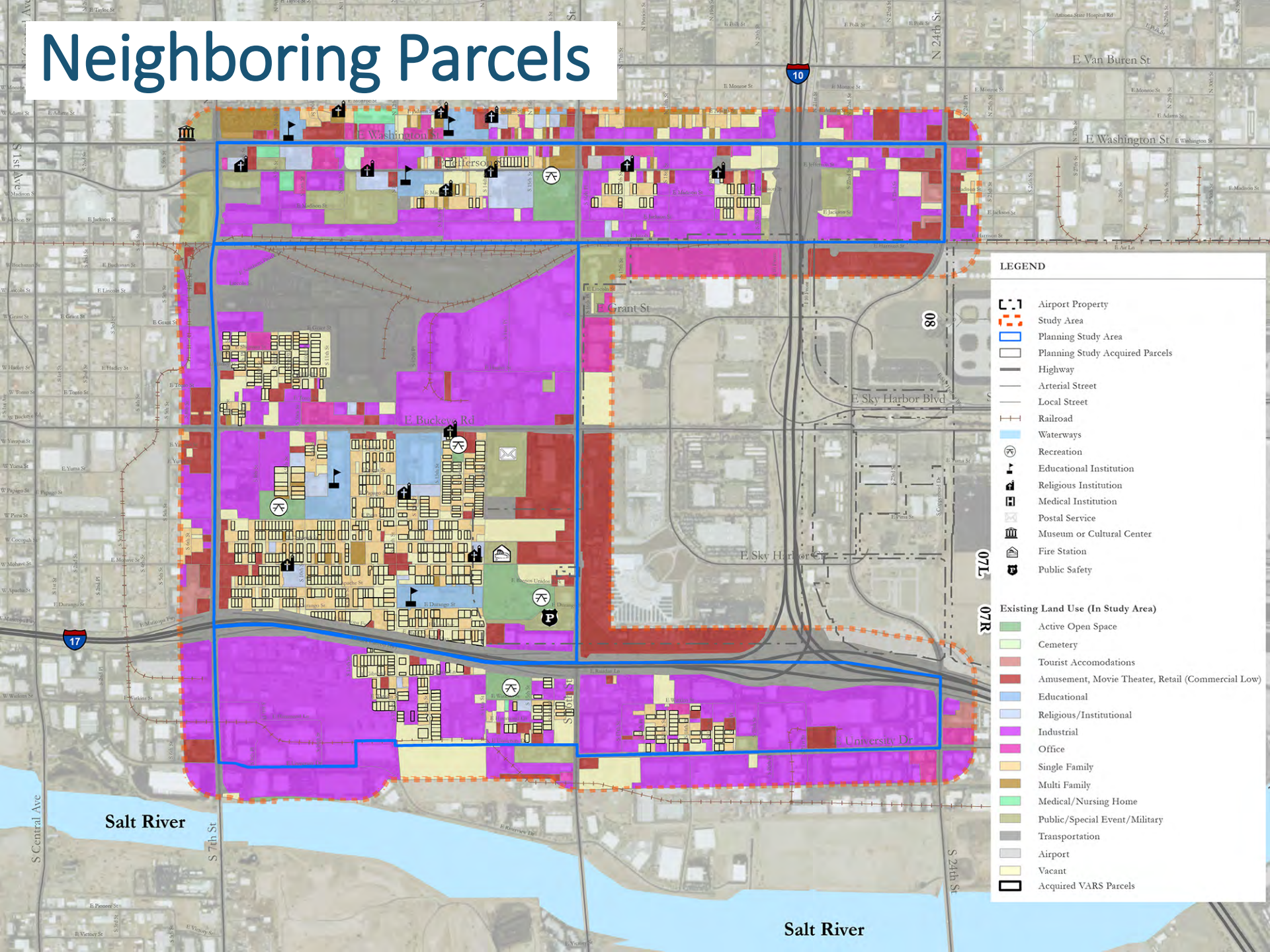
Notes

- 1/ Airport elevation ranges from approximately 1,110 to 1,135 feet above mean sea level (MSL).
- 2/ Height Zone A - Airport Property
- 3/ Height Zone B - Downtown Zone
- 4/ Height Zone C - Aircraft Approach and Departure Zone (west side of Airport)
- 5/ Height Zone E - Aircraft Maneuvering Zone

Zoning/Deed Restrictions

Salt River

Neighboring Parcels



LEGEND

- Airport Property
- Study Area
- Planning Study Area
- Planning Study Acquired Parcels
- Highway
- Arterial Street
- Local Street
- Railroad
- Waterways
- Recreation
- Educational Institution
- Religious Institution
- Medical Institution
- Postal Service
- Museum or Cultural Center
- Fire Station
- Public Safety

Existing Land Use (In Study Area)

- Active Open Space
- Cemetery
- Tourist Accommodations
- Amusement, Movie Theater, Retail (Commercial Low)
- Educational
- Religious/Institutional
- Industrial
- Office
- Single Family
- Multi Family
- Medical/Nursing Home
- Public/Special Event/Military
- Transportation
- Airport
- Vacant
- Acquired VARS Parcels

Salt River

Salt River

07L
07R

80

10

17

S Central Ave
S 7th St
S 24th St

S 24th St

E Van Buren St
E Washington St
E Madison St
E Jackson St
E Adams St
E Monroe St
E Jefferson St
E Lincoln St
E Grant St
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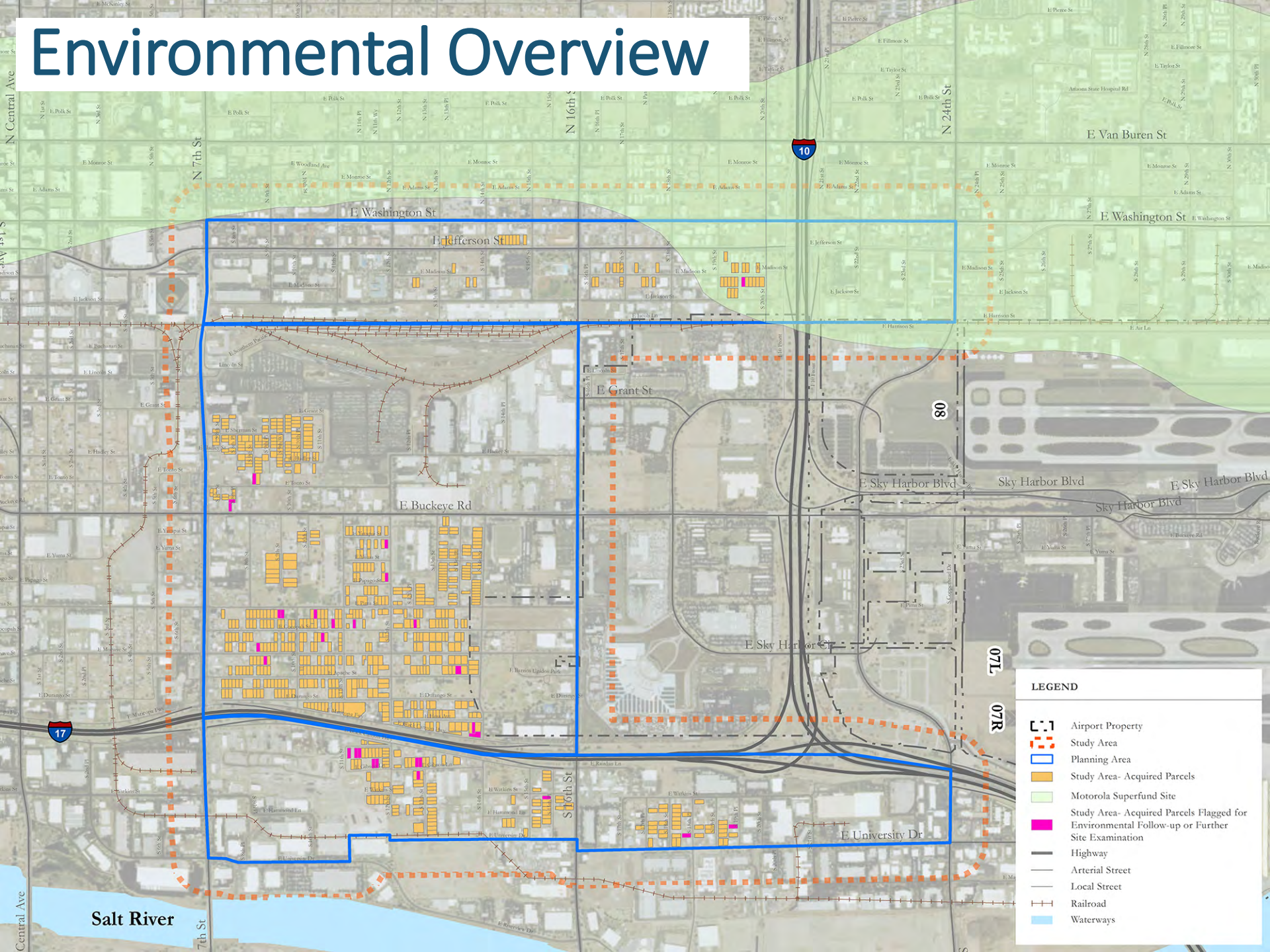
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E Jackson St
E Madison St
E Monroe St
E Jefferson St
E Lincoln St
E Grant St
E Franklin St
E Harrison St

E Buckeye Rd
E Sky Harbor Blvd
E Sky Harbor St
University Dr
E Madison St
E Jackson St
E Adams St
E Monroe St
E Jefferson St
E Lincoln St
E Grant St
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








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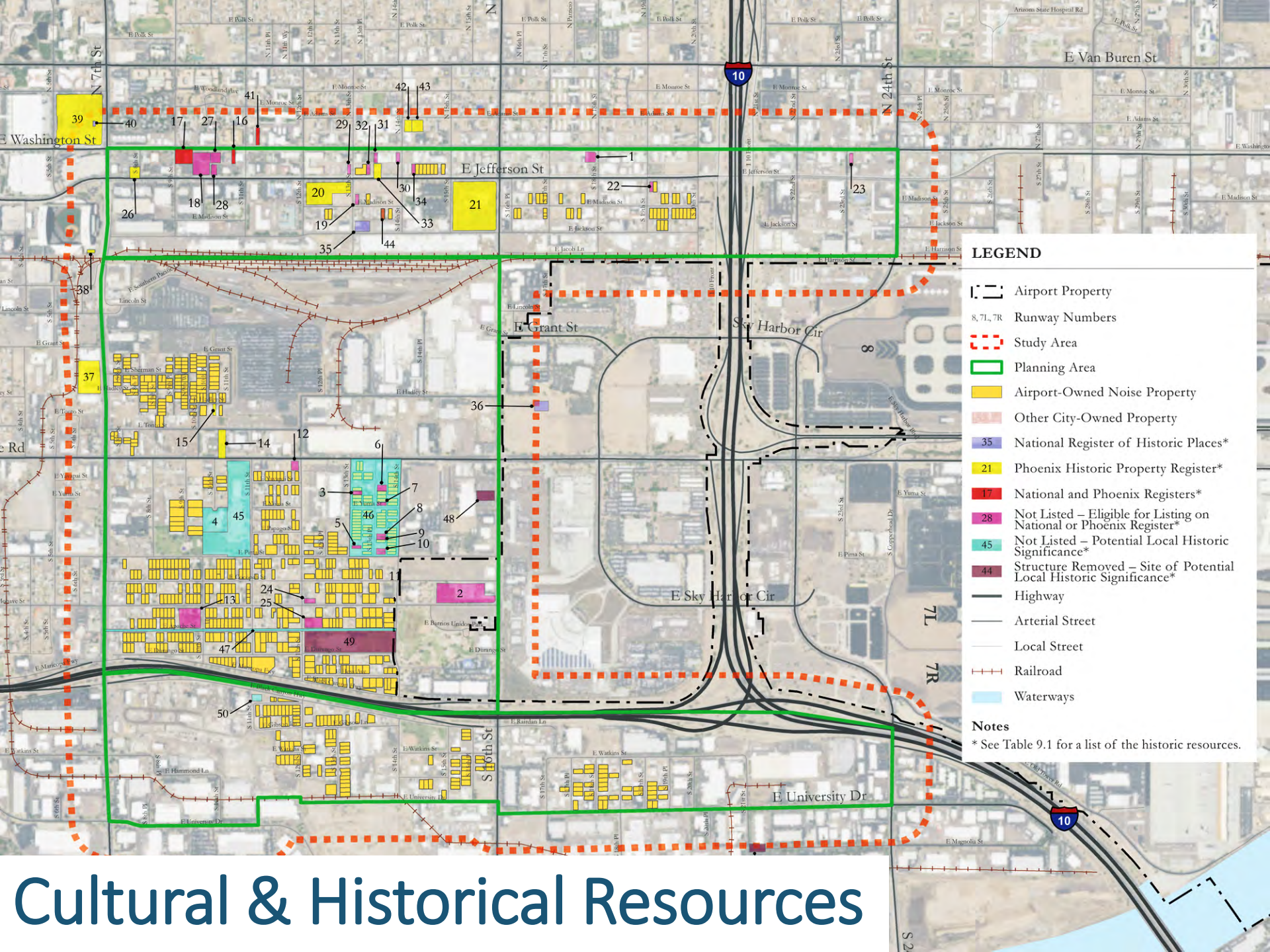
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Environmental Overview



LEGEND

-  Airport Property
-  Study Area
-  Planning Area
-  Study Area - Acquired Parcels
-  Motorola Superfund Site
-  Study Area - Acquired Parcels Flagged for Environmental Follow-up or Further Site Examination
-  Highway
-  Arterial Street
-  Local Street
-  Railroad
-  Waterways



LEGEND

- Airport Property
- Runway Numbers
- Study Area
- Planning Area
- Airport-Owned Noise Property
- Other City-Owned Property
- National Register of Historic Places*
- Phoenix Historic Property Register*
- National and Phoenix Registers*
- Not Listed – Eligible for Listing on National or Phoenix Register*
- Not Listed – Potential Local Historic Significance*
- Structure Removed – Site of Potential Local Historic Significance*
- Highway
- Arterial Street
- Local Street
- Railroad
- Waterways

Notes
 * See Table 9.1 for a list of the historic resources.

Cultural & Historical Resources

Next Steps



Community Engagement

- Known parcels of interest
- Land use preferences
- Strategy preferences



Market Analysis

- Potential land uses
- Preliminary market analysis
- Demand allocation strategy
- Implementation models
- Retention/disposition strategy

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<https://skyharbor.com/LandReuseStrategy>