The Ama-zōning of America

Anticipating Disruption and Using it to Shape Our Cities
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Bookstores in America

1994 – 12,607
2017 – 6,663
Total Change -5,944
47 percent

Source: Quarterly Census of Employment and Wages; U.S. Bureau of Labor Statistics

Source: Flickr (fsse8info)
Acquisitions since 1998 (82)

- PlanetAll
- Junglee
- Bookpages.co.uk
- Telebook
- IMDb
- Alexa Internet
- Accept.com
- e-Niche Inc.
- Drugstore.com
- GeoWorks
- Pets.com
- LiveBid.com
- HomeGrocer.com
- Gear.com
- Tool Crib of the North
- Convergence Corporation
- MindCorps Inc.
- Della.com
- Back to Basics Toys
- Ashford.com
- Leep Technology
- CDNow
- Joyo.com
- BookSurge
- Mobipocket.com
- CreateSpace.com
- Smallparts.com
- Shopbop
- dpreview.com
- Brilliance Audio
- Audible.com
- Fabric.com
- Box Office Mojo
- AbeBooks
- Shelves
- Reflexive Entertainment
- Zappos
- Lexcycle
- SnapTell
- Touchco
- Woot
- Quidsi
- BuyVIP
- Amie Street
- Toby Press
- LoveFilm
- The Book Depository
- Pushbutton
- Yap
- Kiva Systems
- Teachstreet
- Evi
- Avalon Books
- IVONA Software
- Goodreads
- Liquavista
- TenMarks Education Inc.
- Double Helix Games
- comiXology
- Twitch
- Annapurna Labs
- 2lemetry
- ClusterK
- Shoefitr
- Safaba Translation Systems
- Elemental Technologies
- AppThwack
- NICE
- Curse Inc.
- Biba Systems
- Cloud9 IDE
- Harvest.ai
- Thinkbox Software
- Do.com
- Souq.com
- Whole Foods Market
- GameSparks
- Graphiq
- Wing.ae
- Body Labs
- Goo Technologies
- Blink Home
Acquisitions by Year

- 1998-2000
- 2001-2005
- 2006-2010
- 2011-2015
- 2016-2017

Acquisitions by Year
Whole Foods Market

- 2017
- Cost of $13.7 Billion
- 504 stores and distribution centers (including Whole Foods 365)
- 183 million people within a 30-minute drive (56 percent of U.S. pop)
Walmart

- 4,700+ stores
- 295 million people within a 30-minute drive (90 percent of U.S. pop)
- Acquires Jet.com in 2016 for $3.3 billion
- Online inventory grew from 10 million in 2016 to 67 million items in 2017
- Grocery pickup service at 1,000 stores

Source: Wikimedia (creative commons)
Ingredients for a Major Disruption Too Much Space (GLA for all retail scales)
Retail in Strip Centers and Malls
Minimum 28,000 GLA
~ 1 Anchor and 10 bays

• Over 7,500 mid-large retail centers
• The most vulnerable retail
• 3.2 billion sq ft of GLA
• 10 sq ft per capita
• Mall of America – 4.6 million sq ft
Retail in Strip Centers and Malls Are the Most Vulnerable

1. Arizona – 14.8 GLA
2. Nevada – 14.1
3. Virginia – 14.1
4. Delaware – 13.8
5. Maryland – 13.6
6. New Jersey – 13.4
7. Pennsylvania – 12.6
8. Colorado – 12.0
9. Ohio – 11.9
10. Florida – 11.6
Overbuilt Retail

Hyper-consolidation (M & A)

Automation
One-hour Delivery of most retail goods IS INEVITABLE

• Whole Foods One-hour delivery currently in Austin, Cincinnati, Dallas and Virginia Beach

• Less than three years away ALL markets – not just groceries
E-commerce is changing access needs

Total U.S. Retail Sales

Source: https://www.census.gov/retail/index.html
Hard to regulate what we don’t understand

What we have:

- Commercial Load Zone permits
- Truck Loading Zones
- Right of Way Zones
3 ROW zones

PEDESTRIAN REALM
Comprised of frontage, pedestrian mobility, and furniture zones between the property line and the flex or travelway zones. This space includes the sidewalk, planting areas, bus shelters, sidewalk cafes, and bike racks.

TRAVELWAY
Most often used for mobility purposes. Lanes can serve all modes or be dedicated to serve specific modes, such as a bus or bike lane.

FLEX ZONE
An essential zone for people and goods, providing separation between moving vehicles in the travelway and people in the pedestrian realm. This zone can contain multiple uses along a street - including commercial deliveries, parklets, on-street parking, and taxi zones. It can be used for mobility at specific times of the day.
ROW functions by zone
Hard to regulate what we don’t understand

What we are missing:

• Data on deliveries!
• Totals counts and vehicle type/mode split of all deliveries
• Total number of deliveries classified by package and speed type (restaurant, 1-hr, 2-day, ground, size of package, etc)
• Impact of urban freight on network during peak/off-peak
• Etc
Understanding Urban Goods Movement

• How do we assess the applications, impacts, and design implications of drone/robowalker delivery and building integration
What to Expect

Strip and Big Box example
Greenspace / circulation
23.2 acres
21.2% of site

21.2%
Streets & Access

24.8 acres
22.7% of site
Building Footprints

17.3 acres (750,000 s.f.)
15.8% of site
Parking
44.2 acres
40.3% of site
Atlanta Region commercial vulnerability

*Green less vulnerable
* Red more vulnerable
Atlanta Region commercial vulnerability ~ 6 percent of the entire developed region
Columbus Region commercial vulnerability

*Green less vulnerable
* Red more vulnerable
Columbus Region commercial vulnerability
~ 4 percent of the entire developed region
Q & A with

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