

Characteristics of Retail Development in the Phoenix Area Since 1950

by

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ABSTRACT

The Phoenix area is often considered the mecca of suburban residential sprawl and for as long as the city has been growing, retail development has followed. Despite occurring alongside residential sprawl, retail development does not have the same characteristics as residential suburban sprawl and has more closely followed national retail trends. Regardless, there are still some differences, therefore the research question that will be asked here is how have the characteristics of retail development in Greater Phoenix followed the national trends of retail developments that were established in each decade since the 1950s? Characteristics were gathered from a literature review and 29 sample retail developments from various types of retail formats popularized in the various decades including commercial strips, regional shopping centers, big box centers, factory outlet malls, power centers, power parks, and lifestyle centers were surveyed. Overall, it was found that many retail developments in Phoenix are larger than the national standard. Additionally, retail formats like power parks, power towns, and big box centers included more small and medium sized inline or strip storefronts than the national standard. But, in general, many characteristics other than those already mentioned did not vary much from the national norms. In the end, retail development will continue to be important as the Phoenix area continues to grow into one of the biggest metros in the country.

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CHAPTER 1

INTRODUCTION

The Phoenix area which is known as the Valley of the Sun has always been known as a place with high levels of suburban sprawl. While people more often think of suburban sprawl as having to do with more residential development, commercial development and more specifically retail development has always accompanied the sprawl. This is because people are always going to need places to shop and dine that are nearby to where they live. While retail development, particularly in the Phoenix area has not changed as dramatically as residential since the 1950s, there are subtle changes and new retail formats that have appeared since then.

Before the 1950s, most shopping was done closer to the urban core, and as people moved to the suburbs, newer neighborhood and strip centers and corner stores opened up closer to where people were living. Both formats continue to get built to this day, as suburban development continues. In the 1960s, a new type of retail development popped up in the form of the regional mall. Later in the 1960s and 1970s the main theme for retail development was enlargement. Formats like the big box and community centers popped up with large warehouse style stores like Walmart, which anchored large sprawling developments. The 1980s and the 1990s were all about new innovations in retail development. Formats like factory outlet centers and power towns aimed to make shopping more of a destination instead of a daily annoyance. This entertaining emphasis of retail would continue to the twenty-first century with the advent of the lifestyle center that brought together entertainment and shopping to a main street atmosphere.

These different types of retail formats happened nationwide, but there were some regional differences to many of the characteristics of these formats and the Phoenix region is no different. So, the research question that will be asked here is how have the characteristics of retail development in Greater Phoenix followed the national trends of retail developments that were established in each decade since the 1950s? To answer this, various sample retail developments from each format were identified and studied from the Phoenix area. For example, from the 1950s and 1960s format, six commercial strips/ strip centers/ neighborhood centers were found and studied in the Phoenix area. This was done for each decade and format up to the 2000s and 2010's lifestyle centers. The methodology and study process will be more deeply described in the methodology center, but what is most important to note is that the sample developments are not necessarily built in the decade the format was popularized, as many developments like corner stores and even regional malls are still being built new to the present day. But to be able to study sample developments, first a literature review needs to be conducted finding the characteristics of each retail format from each decade.

CHAPTER 2

LITERATURE REVIEW BY DECADE

1950s

In the beginning of the post war period of the 1950s, shopping was still primarily done near downtown and the urban core. But as more people moved into the suburbs, there became a need for more suburban retail options. The article *From Town Center to Shopping Center: The Reconfiguration of Community Marketplaces in Postwar America* by Lizabeth Cohen found that “between 1947 and 1953 alone, the suburban population increased by 43 percent” (Cohen 1051). According to this same article, the first merchandisers that built out in the suburbs built commercial strip centers and neighborhood centers. They were built near highways so that they were easily accessible by cars. In the book *Principles of Urban Retail Planning and Development* by Robert Gibbs, he describes strip and neighborhood centers as being the core of a neighborhood that people go to for their daily needs. These centers of around 250,000 to 350,000 square feet would have a supermarket, pharmacy, some restaurants, and small retail storefronts serving a variety of purposes. These strips are typically oriented to the road in a long strip of a building with strips of parking in front and a service lane in back, as figure 6.1 from the book shows.

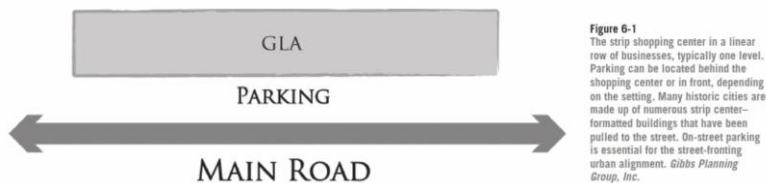


Figure 6-1
The strip shopping center in a linear row of businesses, typically one level. Parking can be located behind the shopping center or in front, depending on the setting. Many historic cities are made up of numerous strip center-formatted buildings that have been pulled to the street. On-street parking is essential for the street-fronting urban alignment. Gibbs Planning Group, Inc.

By the end of the 1950s, the regional center or mall had emerged and was advertised as one stop shopping places. In the same book by Robert Gibbs, the regional

mall is described as having up to 2 million square feet of space. These malls were typically designed in a dumbbell or W format, with large department store anchors on the edges and inline shops and a food court in between the anchors. The location of malls is typically around major highways, and they have standard architecture and design for the whole development. The mall portion is surrounded by a great mass of parking with a ring road surrounding it. On the periphery of the mall is typically individual restaurant and retail pads, often chain retail or restaurants. Finally, regional malls require at least 150,000 people living within a 10-to-12-mile radius. This often leaves only mid-size to larger cities with regional malls. This also means that malls become a destination and tourist attraction for those from out of town and people from smaller towns.

These new suburban regional centers quickly became popular and were even adopted in other countries like Australia where according to the article *Written testimony, oral history and retail environments Australian shopping centers in the 1960s* by Matthew Bailey, their success was due to easy parking, air conditioning, and standard and unified shopping experience across stores, along with the agglomeration of shopping stores. These success factors can just as easily be applied to the United States as well. One final retail format to address from this decade is the corner store. This format popped up at this time to serve the car centric public with easily accessible parking. Corner stores range from 1,500 to 3,000 square feet and as their name implies are often at the corner of intersections, often near other retail formats like neighborhood centers. Newer corner stores from the 1970s onward typically also had gas stations.

1960s & 1970s

By the 1960s and 1970s a new threat was emerging for the department stores that were setting up shop in regional malls. When the first Walmart was invented in the later parts of the 1960s, no one knew that it would give rise to a new dominant form of retail development. Walmart first popularized the big box center due to a new logistical network they pioneered. This was to strategically place stores around a distribution center in a city ensuring that they would always have a diverse set of merchandise that was easily restocked. Other traditional big box retailers like Home Depot followed. According to the book by Robert Gibbs, big box centers are typically between 250,000 and 350,000 square feet and need a customer base of at least 50,000 within a five miles radius. These centers are dominated by large warehouse style stores with equally large parking lots in front of them. They typically have little to no small businesses or small retailers. Part of the reasoning behind this is because many big box retailers like Walmart and Home Depot develop and own their own sites, meaning their building is typically alone and if there are any other retailers on their land, they are typically restaurant or fast-food pads on the periphery of their property.

The main effect that big box retailers had, was in jumpstarting the slow demise of the regional mall. As the population started to move further out past the post war suburbs, the areas around many malls started to decline. With the population surrounding malls still needing a place to shop, big box retailers started to de-mall many regional malls around the country. The article *Dead Malls: Suburban Activism, Local Spaces, Global Logistics* describes the process of de-malling as meaning “they [the big box retailer] buy into an existing site and close off the mall entrance, typically leaving the internal corridor to die” (Paralette and Cowen 802). Additionally, the big box stores continued to gain

traction further out than the post war suburbs. This continued downturn of the postwar malls would lead to many of them being redeveloped into things like power centers or lifestyle centers, both of which will be discussed later.

Along with the big box center, another retail format; the community center was also following the big box centers further out into the suburbs. Community centers are similar to big box centers in square footage with community centers being between 100,000 and 450,000. The main difference that can be inferred from Gibbs' book is that instead of the large anchor like Walmart owning and operating a big box center, a development firm owns and operates the retail destination. This allows there to be smaller inline stores and larger junior anchor stores like Ross and TjMaxx alongside the large Walmart type anchor. The inline stores are often between 10,000 and 20,000 square feet.

1980s & 1990s

By the 1980s, many of the postwar malls, commercial strips, and neighborhood centers were becoming dated and in need of redevelopment, which many of them did receive. This downturn coincides with the commercial real estate crisis of the early 1990s which as the article *The Commercial Real Estate Crisis of the 1980s and 1990s* by Joe Martin describes, had a big impact on retail development across the country. After the crisis had subsided, there was renewed interest in retail development and new innovative retail formats were being created. One of these innovations was the factory outlet center.

Peter Jones in the article *Factory outlet shopping centres and planning issues* describes factory outlet centers as that "They provide an attractive, modern, accessible retail environment from which manufacturers sell their seconds, samples and surplus brand name products direct to the public at substantial (30-70 per cent) discounts" (Jones

2). While the first factory outlet center was created in 1974 in Pennsylvania, it was truly popularized and expanded throughout the country in the 1990s. In square footage, it can vary from 150,000 to over 1 million square feet. Traditionally, outlet centers are often on the fringes of cities off major freeways. This is due to them being a large tourist draw for people within a 25-mile radius and sometimes from as far away as 150 miles. The design of outlet centers is often not like the more traditional strip centers. They are more similar to regional centers with inline shops and often food courts oriented towards a pedestrian walkway. The main differences are that outlet centers have no large anchors, are outdoors, and are smaller than regional malls. In the article *Traditional malls vs. factory outlets: comparing shopper typologies and implications for retail strategy* they note that the amount of outlet centers has gone up 27% since 1993.

Another relatively new retail format that emerged around this time was the power center. In the article *Power centres: a new retail format in the United States of America* by Barbara Hahn, she mentions that the first power center was opened in 1986. Later, by 1997 there were 113 power centers in the U.S. The simple definition of a power center is that it is where there are numerous big box retailers in one development. Often one management company manages a power center, but sometimes, each big box retailer purchases and manages their own lot and building within a power center. In this case it would be called a power park. Like its smaller sibling, the big box center, there are often little to no smaller retailers as the big box retailer would typically only build space for them. Additionally, the power center/ park also has a larger sibling in the form of a power town.

In the article *Powering Up Retail: Power towns are revved up versions of traditional big box centers* they describe power towns as being between 600,000 to 1 million square feet large “and will feature expanded components beyond big box retail anchors. Some incorporate lifestyle wings into the fray, others build in a mix of uses such as residential or office, and some add a significant entertainment or hospitality element” (108). Like the regional mall, these very large retail developments are meant to draw people in from a larger area. Any type of power park or center will often have anchors taking up about 80% of the building square footage. Outside of the aesthetic difference between the regional mall and the power park, power parks are often focused on selling hardware goods at a discount price instead of high-end fashion like the regional malls. These are retailers like Home Depot and Walmart, as opposed to traditional department stores like JC Penny.

2000s & 2010s

The innovation of the previous decades in retail formats continued into the new century, with the advent of lifestyle centers. With shopping becoming more of an entertainment provider instead of being strictly for necessity, the lifestyle format of retail developed to serve those entertainment needs. The article *The geography of lifestyle center growth: The emergence of a retail cluster format in the United States* describes lifecycle centers as “unique, usually open-air mix of retail activities together with a range of other land uses typically including dining and entertainment but also encompassing possibilities such as office and residential space” (Rice et. al. 1). The article also mentions that lifecycle centers are modeled after the main streets of old and their pedestrian-oriented atmosphere. Gibbs’ book shows figure 6.7 as a common



Figure 6-7
The basic lifestyle center clusters shops and anchors along a main street. These centers generally perform best when the street is two lanes wide with on-street parking. Gibbs Planning Group, Inc.

example of what lifestyle centers look like. They generally consist of a central shopping street that may or may not have street parking, with the larger stores off to the edge and the smaller retailers as inline shops. Some may also have central plazas and entertainment facilities like small stages. Despite being based on main streets or downtowns; parking is much easier and often free in the lots that surround the development.

One important aspect with lifestyle centers is that they are exclusively in more wealthier areas, in cities with at least 250,000 people. The standard is at least 40,000 people nearby the development and a median income of at least \$75,000. Because of this, these centers are often more architecturally unique than the average shopping plaza. Therefore, these centers attract more boutique and unique entertainment and dining options along with merchandise that is of higher quality. Without the traditional department stores anchors, lifestyle centers go after entertainment anchors like movie theaters. Finally, even more recently, lifestyle centers are incorporating office and residential uses into their developments leading them to mimic downtown cores even more. Outside of lifestyle centers, a major theme of the new century is redeveloping the aging big box centers and neighborhood centers into more sustainable mixed-use development. Due to increasing property values, redeveloping these older retail centers is becoming worthwhile and economically feasible. While mixed use developments were

not focused on in this report, they will become even more important, as the cycle of commercial redevelopment continues.

General Characteristics

While most of the characteristics for the different retail formats are easily discussed by decade, there are a few overlapping trends and characteristics that do not easily fit into one decade or format. One of these is the idea of how quick shopping is to be done. With power centers, neighborhood centers, and corner stores, generally customers want to complete their shopping quickly and the orientation of the stores reflects this, which is to parking lots that have easy access to the streets. On the other hand, regional centers or malls, and lifestyle centers are designed for shopping more slowly and for entertainment. This is evidenced by the stores' orientation towards a central walkable corridor either inside or outside, with parking surrounding it.

Another important thing to note is that these different retail formats do not exist in isolation of one another. Often, they are located right next to and rely upon surrounding retail. For example, in the article *The geography of lifestyle center growth: The emergence of a retail cluster format in the United States* they note that “power centers are often found within two to three miles of a traditional shopping center, and that it is not unusual for the two shopping complex types to be immediately next to each other” (Rice et. al. 2). One potential reason for this is that retail often wants to be in the most visible locations, which often means many different retail formats are congregating around the limited number of major intersections and freeway interchanges and exits.

One important key to retail clustering is that it is not the developers that are deciding on the clustering, it is the characteristics that the retailers themselves desire that

is causing the clustering. Lawrence Joseph establishes in a dissertation that there are specific demographics that retailers desire when deciding where to site their store. One example he gives is Family Dollar which prefers a low to middle income area. This can be combined with the fact that according to this paper, elderly shoppers prefer price conscious shopping. Therefore, a strip center that is in an area that is low income and elderly might be a perfect location for a Family Dollar to move to. On the other hand, Joseph explains that younger adults tend to like shopping and working in urban areas. This could explain the rise of lifestyle centers that attract younger hipper retail shops as well as why they also include office and residential uses. Finally, Joseph establishes that the reason why retail clusters close together is because of zoning and agglomeration which “extends the size of trade areas because of the opportunities for multipurpose and comparison shopping” (Joseph 50).

Finally, the different retail formats provided are generally applicable across the United States, and the goal of this research is to sample examples of these retail formats in Greater Phoenix to see how they differ or not from the general national trends. Up next will be the methodology including the list of characteristics from each retail format in each decade and the source of how they were determined in each sample development as well as a list of the surveyed sites.

CHAPTER 3

METHODOLOGY

Included in this section is a list of characteristics for each retail format that was popularized or created in their respective decade, along with the source of how the characteristic was identified in each sample neighborhood. All of the characteristics came from academic articles that were covered in the literature review. Regarding the sample retail sites themselves, overall, 29 retail sites were surveyed according to the characteristics listed. The sites come from all across the valley and were identified by either being well known significant developments like Metrocenter Mall or through searching for retail sites that match the descriptions of the various retail formats. One important thing to note is that the retail site chosen does not necessarily have to be built in the decade its respective retail format was developed. For example, Arrowhead Towne Center is clearly a regional shopping center based off the original format popularized in the 1950s, but the mall was built in the 1990s. This differs from residential development in which for example midcentury ranch style homes are not built en masse by homebuilders anymore. Overall, these 29 retail developments surveyed serve as a good sample into the how retail development in Greater Phoenix have followed the national retail trends and formats.

Table 3.1: List of Characteristics

Table 3.1: List of Characteristics with Sources		
1950s	Characteristic	Source
Commercial "strips" / convenience centers/ neighborhood center		
1	Shopping district at the core of the residential community	Google maps
2	Easily accessible by car	Google maps
3	Transit availability	Google maps

4	Commercial properties developed a single lot deep and oriented toward main streets, arterials and older highways	Google maps
5	Square footage	Maricopa county assessor's office
6	Percentage parking lot versus building	Google maps
7	Lot size	Maricopa county assessor's office
8	Year built	Maricopa county assessor's office
9	Supermarket, pharmacy, and restaurant as anchor that offers a complete array of services and goods	Google maps
10	Closest nearby retail	Google maps
11	Straight line of stores with a service rear lane and parking in front. The anchor store is commonly a supermarket and is placed either at the end or in the center of the development	Google maps
Corner Stores		
1	Square footage (between 1,500 to 3,000)	Maricopa county assessor's office
2	Lot size	Maricopa county assessor's office
3	Percentage building vs parking	Maricopa county assessor's office
4	Year built	Maricopa county assessor's office
5	Convenient parking	Google maps
6	Easily accessible by car	Google maps
7	Gas station	Google maps
8	Transit availability	Google maps
9	Closest nearby retail	Google maps
Regional Shopping Centers (Malls)		
1	Nearby major road	Google maps
2	Plentiful parking	Google maps
3	Standard Design	Google maps
4	Canopied or indoor corridors	Google maps
5	Building isolated in sea of parking	Google maps
6	Oval ring road surrounding	Google maps
7	Periphery parking	Google maps
8	Parking decks	Google maps
9	Concentrated clothing and department stores	Google maps
10	2 Fashion oriented department stores	Google maps
11	Inline shops and restaurants totaling 250,000 to 300,000 square feet	Maricopa county assessor's office or

		mall website or news article
12	Transit availability	Google maps
13	Dumbbell or 5 anchor W mall design	Google maps
1960s & 1970s	Characteristic	Source
Big Box / Community Center		
1	Category Killer' stores focusing on specific products	Google maps
2	Stores nearby to distribution centers	Google maps
3	Square footage (between 250,000 to 300,000)	Maricopa county assessor's office
4	Lot size	Maricopa county assessor's office
5	Nearby population of at least 50,000 within 4-6 miles	2020 Census
6	Little to no small businesses/ retailers	Google maps
7	Convenient parking	Google maps
8	Warehouse style stores	Google maps
1980s & 1990s	Characteristic	Source
Factory Outlet Centers		
1	manufactures sell products direct to consumer	Google maps
2	Square footage (150,000 to 1 million)	Maricopa county assessor's office or development website or news article
3	Lot size	Maricopa county assessor's office or development website or news article
4	Population within 25 miles	2020 Census
5	Food court	Google maps
6	Percentage building versus parking	Maricopa county assessor's office
7	Tourist attraction	Google maps
8	Miles from city center	Google maps
9	Closest nearby roadway	
Power Centers		
1	Collection of bog box retailers	Google maps
2	Development planned, developed, owned, and managed together	Maricopa county assessor's office or development website or news article

3	Convenient onsite parking	Google maps
4	Power park	Maricopa county assessor's office
5	Small businesses/ retailers present	Google maps
6	Specialization on selling hard goods	Google maps
7	Square footage	Maricopa county assessor's office
8	Lot size	Maricopa county assessor's office
9	Percentage building versus parking	Maricopa county assessor's office
10	90% of retail space is devoted to anchors	google maps or development website or news article
11	Closest nearby retail	Google maps
12	Not enclosed	Google maps
13	Closest nearby roadway	Google maps
Power Town		
1	Square footage (600,000 to 1 million)	Maricopa county assessor's office or mall website or news article
2	Include other components beside big box retailers	
3	percentage building versus parking	Maricopa county assessor's office
4	Development planned, developed, owned, and managed together	Maricopa county assessor's office or development website or news article
5	Convenient onsite parking	Google maps
6	Lifestyle wings included	Google maps
7	Entertainment and hospitality options	Google maps
8	Core base of big box retailers like Target, Home Depot, Best Buy, and Kohls	Google maps
2000s & 2010s	Characteristic	Source
lifestyle Centers		
1	Storefronts facing a pedestrian oriented street or open air plaza	
2	Square footage	Maricopa county assessor's office or mall website or news article

3	Square footage to lot ratio	Maricopa county assessor's office
4	More convenient parking then downtown shopping districts	Google maps
5	Localized income of at least \$75,000	Arizona Demogrphics.com
6	Unique design	Google maps
7	Fashionable merchandise	google maps or mall website or news article
8	Entertainment and hospitality options	Google maps
9	Unique and appealing dining options	Google maps
10	Population within 10 miles (at least 250,000)	2020 EMSI
11	Movie theaters as anchors	Google maps
12	Based on main street format	Google maps

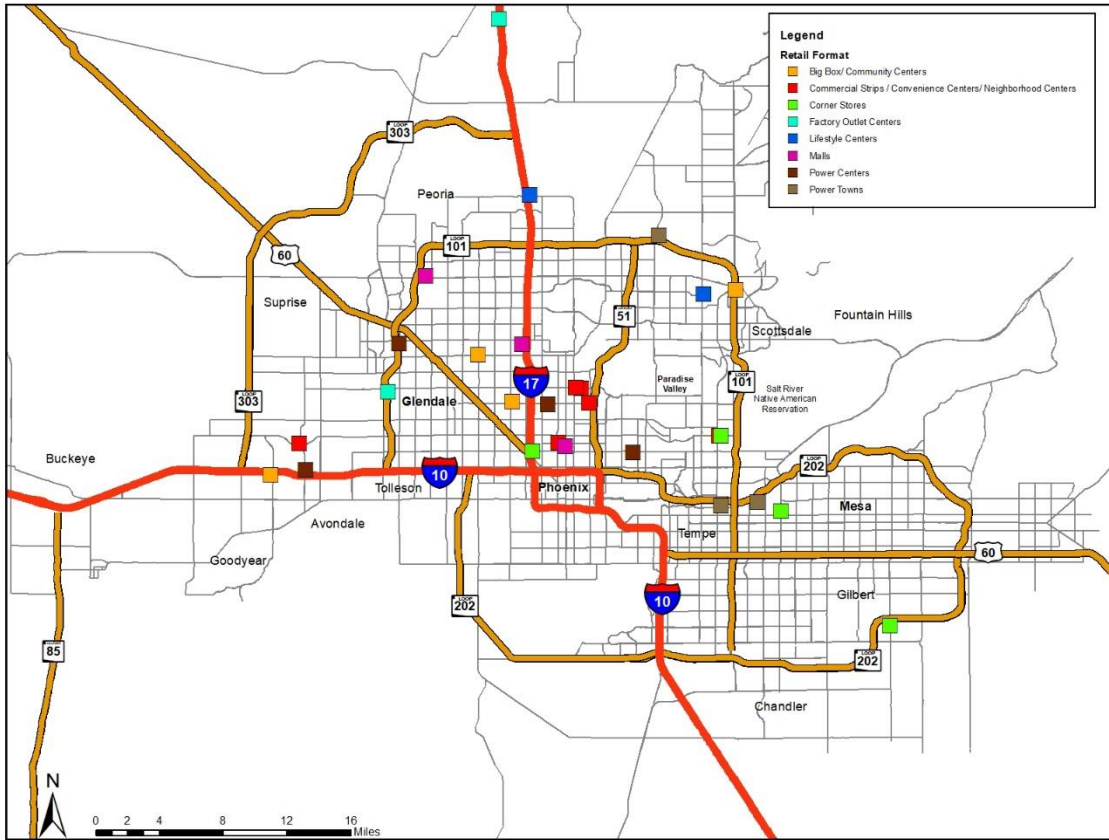
Table 3.2: Surveyed Sites

Table 3.2: List of Retail Developments Surveyed		
1950s	Development Name	Address
Commercial "strips" / convenience centers/ neighborhood center		
1	North Park Plaza	520 W Osborn Rd, Phoenix, AZ 85013
2	Walmart neighborhood market	14200 W Indian School Rd, Goodyear, AZ 85395
3	1139 E Glendale Ave, Phoenix, AZ 85020	1139 E Glendale Ave, Phoenix, AZ 85020
4	Madison Village Marketplace	806 E Glendale Ave, Phoenix, AZ 85020
5	Bashas'	8035 E Indian School Rd, Scottsdale, AZ 85251
6	Sunbrite Corner	6016 N 16th St, Phoenix, AZ 85014
Corner Stores		
1	Circle K	8140 E Indian School Rd, Scottsdale, AZ 85251
2	Aa's Corner Mart	2344 W Thomas Rd, Phoenix, AZ 85015

3	Fast market	1636 S Higley Rd, Gilbert, AZ 85295
4	Mr J's Market	559 N Country Club Dr, Mesa, AZ 85201
Regional Shopping Centers (Malls)		
1	Park Central Mall	3121 N 3rd Ave, Phoenix, AZ 85013
2	Arrowhead Mall	7700 W Arrowhead Towne Center, Glendale AZ 85308
3	Metro center Mall	9617 N Metro Pkwy W, Phoenix, AZ 85051
1960s & 1970s		
Big Box/ Community Centers		
1	Bethany Towne Center	6135 N 35th Ave, Phoenix, AZ 85017
3	Scottsdale Towne Center	15444 N Frank Lloyd Wright Blvd, Scottsdale AZ, 85260
4	Estrella Marketplace	1100 N Estrella Pkwy, Goodyear, AZ 85338
1980s & 1990s		
Factory Outlet Centers		
1	Outlets at Anthem	4250 W Anthem Way, Phoenix, AZ 85086
2	Tanger Outlets	6800 N 95th Ave, Glendale, AZ 85305
Power Centers		
1	Desert Palms Power Center	3721 E Thomas Rd, Phoenix, AZ 85018
2	Peoria Power Center	10250 N 91st Ave, Peoria, AZ 85345
3	Christown Spectrum	1607 W Bethany Home Rd, Phoenix, AZ 85015
4	Palm Valley Pavilions	13837 W McDowell Rd, Goodyear, AZ 85395
Power Towns		
1	Tempe Marketplace	2000 E Rio Salado Pkwy, Tempe, AZ 85281
2	Desert Ridge Marketplace	21001 N Tatum Blvd, Phoenix, AZ 85050
3	Mesa Riverview	1061 N Dobson Rd, Mesa, AZ 85201
2000s & 2010s		

Lifestyle Centers		
1	Scottsdale Quarter	15059 N Scottsdale Rd, Scottsdale, AZ 85254
2	Kierland Commons	15205 N Kierland Blvd, Scottsdale AZ 85254
3	The Shops at Norterra	2450 W Happy Valley Rd, Phoenix, AZ 85085

Table 3.3: Surveyed Sites Map



CHAPTER 4

DATA ANALYSIS BY DECADE

As mentioned previously, 29 total retail developments were analyzed according to their respective retail format characteristic list. The primary way that the characteristics were identified in each retail development was through Google Maps and Google Street view or through county assessor's data. For some of the more well-known sites like the malls and lifestyle centers, the development's website, or news articles about it was used to gather and analyze relevant information to specific characteristics. The way this analysis is organized is by going sequentially through each retail format by the decade the format was invented or popularized as evidenced by the literature review. Within each retail format, each development surveyed will be briefly identified along with any interesting deviations from the standard characteristics. Then the summarized characteristics including all developments will be discussed and compared to the established standard in more detail.

1950s

Starting with the 1950s, three retail formats were identified including commercial "strips" / convenience centers/ neighborhood center, corner stores, and regional shopping centers that are also known as malls. With the first format, six developments were identified and studied that would fall into the commercial "strips" / convenience centers/ neighborhood center category. The first development surveyed is North Park Plaza in Phoenix. This is a standard neighborhood center with a supermarket anchor adjacent to three small strip centers. The next development is a Walmart Neighborhood Market in Goodyear which has a few interesting deviations from the standard neighborhood center.

This first deviation is that Walmart owns their own independent parcel with the additional retailers in the center being managed separately, which is uncommon for this retail format, but common for Walmart. The next deviation is that there is small private school located in this center, which while somewhat common for the Phoenix region, is still outside of the norm. The final deviation is that the surrounding small strip centers in the development are oriented towards Walmart as figure 4.1 shows as opposed to being oriented towards the street as is common for this format. The third development analyzed is a small mid-century strip center anchored by a frozen yogurt shop, located in Phoenix. This standard strip center has a thin strip of parking in front of the stores and a service lane in the rear.

The fourth development is Madison Village Marketplace in Phoenix. This is also a standard neighborhood center anchored by a supermarket with a long strip center adjacent. The only deviation is that unlike most other surveyed retail, this development is connected via sidewalk to the street, as figure 4.2 shows. The fifth development is a Bashas' in south Scottsdale. This development could be considered a convenience center due mostly to the fact that it only has a supermarket, drug store and a fast-food restaurant on site. The final site surveyed, Sunbrite Corner in Phoenix is probably the most interesting as it is the only retail development surveyed with storefronts oriented to the sidewalk and parking in the rear. As figure 4.3 shows, this L shaped strip center has almost all parking in the rear with only one strip up front. This strip center has no traditional anchors and consists of boutique restaurants, salons and clothing stores.



Figure 4.1: Google Maps. 2022. Walmart Neighborhood Market. Goodyear, AZ. Street or Satellite Map.



Figure 4.2: Google Maps. 2022. Madison Village Marketplace. Phoenix, AZ. Street or Satellite Map.

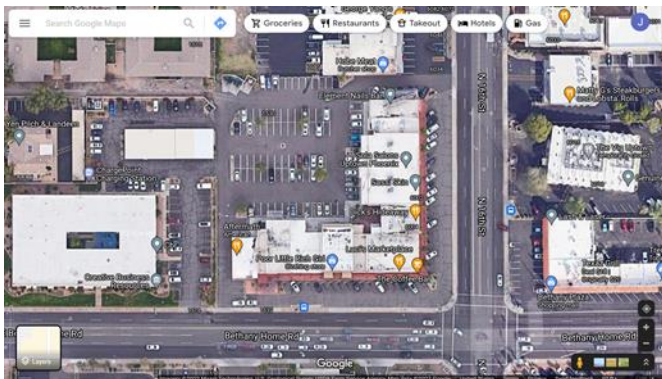


Figure 4.3: Google Maps. 2022. Sunbrite Corner. Phoenix, AZ. Street or Satellite Map.

In comparing all the surveyed developments together, there were a few different themes that appeared. It was found that the larger the development is, like larger commercial strips and neighborhood centers anchored by a supermarket, they tend to be surrounded by residential development. The developments that are smaller or close by to urban centers like downtowns and uptowns tend to be surrounded by more diverse uses. Additionally, all developments are either single or double lot deep and are oriented to major cross streets and major intersections. Regarding sidewalks, only two retail developments surveyed from this group had sidewalks connecting to the development. One of those retail developments was a midcentury strip center with orientation towards street sidewalks. The average square footage of development is 104,808 sq ft while the range of square footage is from 10,533 for a small strip center to over 300,000 for an abnormally large neighborhood center, which is compared to the standard of below 100,000 sq ft. This begins a major theme that is across many formats of retail developments in the Phoenix area being abnormally large in comparison to the standard size that was identified in the literature review. The average lot size is 6.25 acres with the range being from 2 acres on the small end to 11 acres on the large end. The average percentage of the lot that buildings take up is 21.6% while the range is from 17% to 30%. This building to lot percentage stays relatively stable throughout all the decades and retail formats with a few notable exceptions that will be discussed later. All developments have a large array of goods and services with the large developments having a supermarket anchor, just like the literature review states they should have. Finally, other than the exceptions mentioned above, all developments are oriented to the street with parking in the front.

The next retail format that will be analyzed is corner stores. While corner stores have existed for a long time in high density urban areas, the corner store format discussed here is the auto focused corner store that sometimes have gas stations attached to them. The first corner store surveyed was a Circle K in Scottsdale that did not deviate from the established norm. The second store is the independent Aa's Corner Mart in Phoenix which also did not deviate from the norm. The third surveyed property is a Fresh Market with a gas station. An interesting point about gas station corner stores is that the gas station portion heavily effects the percentage building to lot size as only 5.7% of the lot is occupied by a building. Additionally, this development is a pioneer development that is surrounded on its non-road facing sides by empty land that is zoned and ready for retail development, as figure 4.4 shows. The final surveyed corner store is another independent corner store, Mr. J's Market, which also follows the standard norm. In comparing all the corner stores together, the average square footage is 3,408 and the range is from 2,200 to 5,500, which is noticeably larger than the established 1,500 to 3,000 square foot range. The average lot size is 0.775 acres and the average building to lot percentage is 18.1% which includes the one corner store with a gas station. Finally, all the corner stores have easy onsite parking and are adjacent to other types of commercial development, or potential future development.



Figure 4.4: Google Maps. 2022. Fresh Market. Gilbert, AZ. Street or Satellite Map.

The final retail format analyzed that was popularized in the 1950s is the regional shopping center more commonly known as a mall. The first mall chosen is Park Central mall. It is important to note that the Park Central site bears little resemblance to the original mall as it was built, which is why the original development was analyzed using historical photos. There are a few different ways that this development differs from the standard norm of regional shopping centers primarily because Park Central was the first mall built in the Phoenix region. For example, the standard norm is that malls are typically off interstate highways, but since Park Central was built before the interstate system, it is off Central Ave, which is still a major roadway especially back then. Additionally, as the first mall in the Phoenix region, Park Central was canopied, but not air conditioned, other than the stores. This model of retail is similar to the lifestyle center and outlet model that emerged much later. Finally, oval ring roads around the mall and periphery restaurant pads, which are common for malls were not present at Park Central, as figure 4.5 shows. The second mall chosen, Arrowhead Towne Center is comparatively brand new compared to Park Central, as it was built in the 1990s. This mall almost

perfectly encapsulates a standard mall and has all the shared characteristics of a standard mall.

The last mall that was surveyed is perhaps the most famous in the Phoenix region and that is Metrocenter Mall. This mall was recently closed in 2020 after years of decline and will be redeveloped as more of a lifestyle center (Estes). Despite this, data on Google Maps and Google Street view was still showing the development in its mall format at the time of analysis. There are perhaps two interesting things to note about Metrocenter with the first being because this development is so big at over 1 million square feet, there are two ring roads surrounding the mall with an inner ring and an outer ring. The second is that in-between the inner loop and the outer loop, it is filled with non-traditional periphery uses including a hotel, a library and a transit center, and a small strip center, as well as the traditional restaurant pads.



Figure 4.5: “Park Central Old Aerial.” Park Central Phoenix, Plaza Companies and Holualoa Companies. Accessed 1 Mar. 2022. <https://parkcentralphoenix.com/about/>

In addressing all three of the malls together, overall, they mostly fit in line with the established national standards, which is more than can be said for some formats. For example, all surveyed malls are off interstates or major roads, all currently or recently operating malls have similar and unifying designs. Additionally, all the mall buildings are

isolated in an expansive sea of parking and other than Park Central, all other surveyed malls have restaurant and retail pads located on the periphery. One way they differed from the national standard is in parking decks/ garages. As malls grow more popular, often some of the surface lots closest to the mall are converted to parking garages. None of the malls surveyed in Phoenix have parking garages, most likely because land and space were plentiful in Phoenix and the surface lots are already extremely large. One interesting national trend is that often the fashion-based stores and anchors are located on one side of the mall, which is the case with the malls surveyed. Speaking of anchors, all surveyed malls fit the national standard of the mall either being a dumbbell, or five anchor W styled, as figure 4.6 exemplifies.

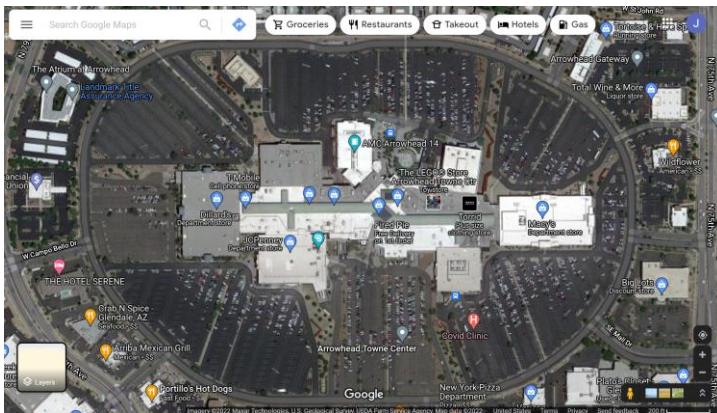


Figure 4.6: Google Maps. 2022. Arrowhead Towne Center. Glendale, AZ. Street or Satellite Map.

1960s & 1970s

For the 1960s and 1970s there was only one retail format that was identified as having been popularized or created during this time period and that is the big box/ community center. The main draw of the big box/ community center is essentially that it is bigger and provides more services than its smaller cousin, the neighborhood center.

Additionally, the rise of the big box format is essentially tied to one company, Walmart. Walmart gave rise to other big box stores and the various large shopping parks that were needed to house them. Overall, three big box centers were analyzed with all of them containing a Walmart or its main competitor, Target.

The first big box center analyzed is Bethany Towne Center in Phoenix. This development matches well with the national trend other than with small businesses. The literature review found that many big box centers have few small businesses, but this development has three independent businesses and a smattering of small store fronts for chain and franchise retail and restaurants. The next development analyzed is Scottsdale Towne Center in Scottsdale and like the previous center also has independent businesses and a smattering of small storefront chains. Additionally, while big box centers are often focused on selling hardware goods, this center is more fashion focused with two discount chains and a Target that are more stylized after fashion department stores than a hardware goods warehouse store. The final big box center analyzed was Estrella marketplace in Goodyear, which like the others also has a good number of small storefronts. This big box center is also exemplified in Figure 4.7.

In comparing all the big box and community centers together compared to the national trend, it was found that all of them were focused on hard goods or discount fashion, with hard goods being the national standard. The average square footage is 263,725 which is well within the 250,000 to 350,000 square feet norm. The average lot size is 30 acres and the average building to lot percentage is 19.8%. One interesting aspect of big box stores that the literature review found was how many big box stores have distribution centers at least in the same city as their stores which is the case in

Phoenix with Walmart and TJMaxx, both of which were present in the surveyed developments. Additionally, for a big box center to be successful, they must have a surrounding population of at least 50,000 within 4 to 6 miles. This was the case with the surveyed developments with the average population within 2 miles of a big box center being 61,000. Finally, each surveyed retail development has around 3 independent small businesses, with the majority of small retailers consisting of chains in each development and two of the big box developments were warehouse style, while one was more fashion (discount) department store styled. While the previous two characteristics only somewhat deviated from the norm, the main major deviation was regarding the surrounding development to these retail centers. The literature review found that large retail chains often preceded the residential sprawl for lower land costs and occasionally followed the residential development. The analysis found that all three surveyed big box centers were built at exactly the same time as surrounding residential or later on as infill. In the end though, this retail format probably most closely followed the national trends, most likely because big box retailers have standardized the format for maximum efficiency.

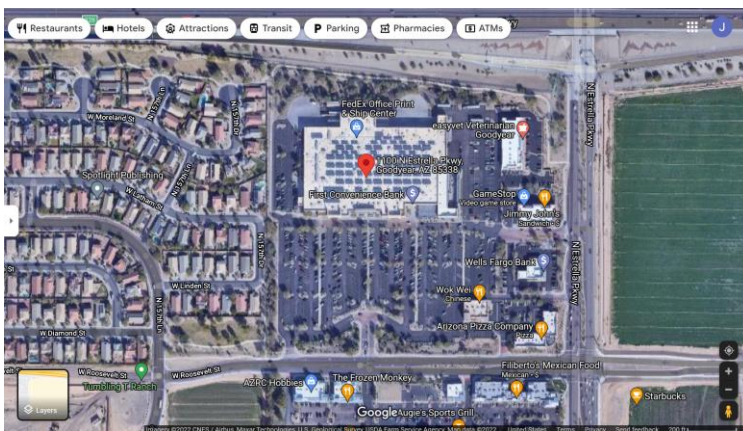


Figure 4.7: Google Maps. 2022. Estrella Marketplace. Goodyear, AZ. Street or Satellite Map.

1980s & 1990s

For the 1980s and 1990s, as the literature review identifies, these two decades were when the retail industry experienced a lot of innovation with exciting new retail formats. Overall, three retail formats were identified as having come from these decades including factory outlet centers, power centers and power towns. Starting with factory outlet centers, two developments in the Phoenix region were surveyed including Outlets at Anthem in the far north valley and Tanger Outlets at Westgate in Glendale. With the Outlets at Anthem, the only thing interesting with it is its tourist draw. While outlet centers generally attract tourists, the Outlets at Anthem attracts additional tourists during the Christmas season with its lighting ceremony of the largest Christmas tree in the state (PR Newswire). With Tanger outlets in the west valley, it also has a unique tourist draw, as it is located in the Westgate Entertainment district which consists of a lifestyle center and two professional sports stadiums including football and hockey.

In considering both outlet centers together, while the norm is for outlet centers to consist of exclusively outlet stores, both surveyed developments contain retailers that sell goods at traditional prices. Outlet stores are defined as manufacturer owned stores that sell directly to the consumer at discounted prices. Their goods are often samples, secondary, or surplus. Both developments fit in the norm of between 150,000 to 1 million square feet, at 300,000 and 400,000 square feet. The lot sizes are 37 and 43 acres, with the percentage building to parking being 15.4% buildings versus 84.6% parking for Anthem and 26.8% buildings versus 73.2% parking for Tanger. Additionally, both outlet centers have food courts which is common. As for the design, both outlet centers follow the standard of interior outdoor pedestrian walkways with expansive parking surrounding

as figure 4.8 exemplifies. One unique thing about outlet centers compared to other retail formats, is that they are almost exclusively built at the edges of cities. This is true for these two outlets centers as well, which are 17 and 31 miles away from downtown Phoenix and are off major freeways, in highly visible locations. Finally, the literature review established that outlet centers draw customers from on average 25 miles away, but many shoppers can come from as far as 125 miles away. Both surveyed outlet centers have between 1 to 3 million people within a 25 miles radius.

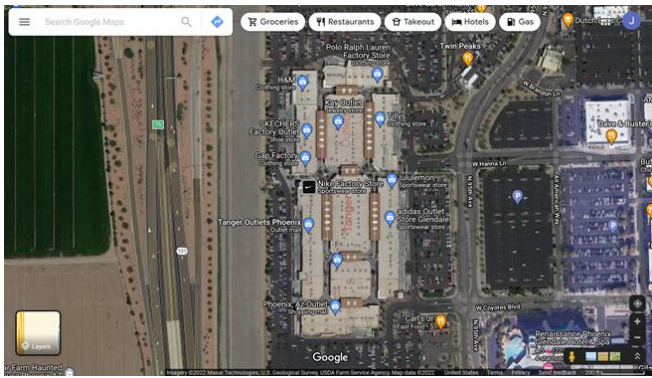


Figure 4.8: Google Maps. 2022. Tanger Outlets. Glendale, AZ. Street or Satellite Map.

The next retail format from these two decades is the power center which is essentially just the big box retail format on a magnified scale. Overall, four power centers were surveyed across Greater Phoenix. The first power center surveyed is Desert Palms Power Center in Phoenix. This is a very traditional power center with the major anchors and adjacent strip center all owning and operating their own parcel. Besides there being a strip center in this power park, the only other oddity is that this power center is located only 1.6 miles from another power center. While according to the literature they can be located next to other retail formats, it is uncommon for them to be located so close to another power park. Additionally, the addition of a strip center on site reduces the

percentage of space anchor tenants take up to 70% which is down from the typical 90%. The next power center surveyed is Peoria Power Center in Peoria, which also mostly follows the standard norms for power centers. The only way this power center differs is that it is located directly adjacent to a neighborhood center. That adjacent neighborhood center was developed to the south and at the same time and by the same developer as Peoria Power Center. Directly to the north are independent restaurant pads, which were sold off by the developer at the same time of development.

The third power center, Christown Spectrum is probably one of the more unique retail developments surveyed. Christown Spectrum actually began its life as an enclosed mall but as the mall declined it was eventually converted into a power center. This former mall exclusively consists of big box retailers like Target, Walmart, formerly a Costco, and a Harkins theater. It was originally developed and managed as a unit, but upon its conversion to a power center, Target, Walmart, and Costco were given ownership and control of their own space, along with the periphery retail pads. While it doesn't have as much parking as purpose-built power centers, ample parking still surrounds the complex. While most power centers are focused on selling hard goods, this power center in its current incarnation has a Ross clothing store, a movie theater, and various restaurants. Christown Spectrum also has a higher total square footage at over 1 million, due to being a former mall. The anchor tenants also only make up 51% of retail space most likely due to this being a former mall. There are additional smaller big box retailers that are not the main anchors that could increase this, but it would still most likely be lower than 90%. This is similar to the other power centers surveyed. Finally, since this was a former mall and one of the first in the valley, there are no significant retail developments directly

adjacent. Like Metrocenter mall, there are also substantial redevelopment plans for Christown Spectrum, with the current owner saying they want to redevelop it into a lifestyle center with mixed uses, and some of the existing anchors staying (Frigerio). As with all plans, only time will tell on what happens in this mall's third act.

The final power center analyzed is Palm Valley Center in Goodyear. Perhaps the most interesting thing about this retail center is that it encompasses both sides of the street, as figure 4.9 shows. Additionally, unlike the traditional power center where each retailer owns their own parcel, here only Target and the periphery retailers own their own land therefore there are many small retailers on the periphery pads and three strip centers on site. Despite having a lot of smaller retailers, outside of a Ross discount clothes, the rest of medium and large retailers are focused on hard goods like Barnes and Noble, Total Wine & More, Maurice's, and Target.

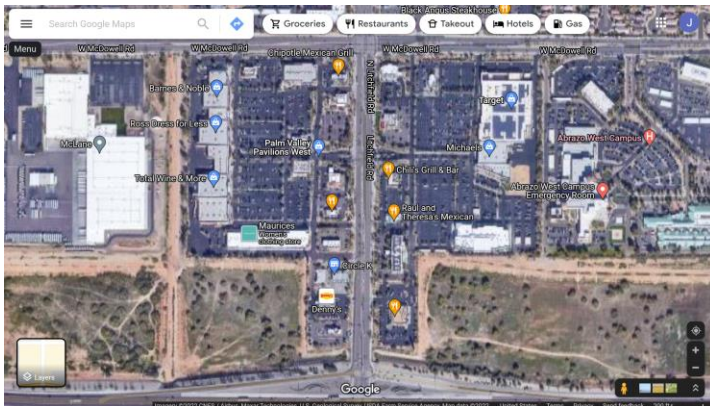


Figure 4.9: Google Maps. 2022. Palm Valley Center. Goodyear. Street or Satellite Map

In comparing all the power centers together, many of the major characteristics are present. For example, they all have similar collections of the more popular big box retailers like Walmart, Target, Home Depot and smaller chains like Ross. Similarly, the larger chains like Walmart and Home Depot own and operate their own stores and land,

while the smaller chains in between or adjacent to the anchors are managed and owned by a management company, which follows the established norm. As with every other retail format surveyed, parking is plentiful with it being in front of the power center facing the road. The average square footage for the surveyed power parks is 624,794 sq ft with the range being from 257,000 to over 1 million square feet. This average square footage is above the norm for power centers and is actually more in line with power towns, which will be discussed next. What makes these developments like Christown not a power town, which is over 1 million square feet, is that it does not feature multiple components beyond big box retailers. The average lot size is 55.41 acres while the average percentage building to lot size is 25%. Additionally, all power centers are not enclosed and are all off major arterial streets. One final similarity to the established norm is that other than Christown Spectrum, every surveyed power center has some type of retail development immediately next to it.

The final retail format analyzed for these two decades is power towns. If power centers are magnified big box centers, then power towns are magnified power centers. The three power towns surveyed are popular and well known throughout the valley. They include Tempe Marketplace, Desert Ridge Marketplace, and Mesa Riverview. Starting with Tempe Marketplace, it is even bigger than the given range found in the literature review at 1.3 million square feet on 130 acres. It has the core base of big box retailers that the literature review states, consisting of Target, Best Buy, Kohls, and others. Additionally, it also contains a central walkable lifestyle district focused on small retail and entertainment like Dave and Busters and restaurants.

The second power town is Desert Ridge Marketplace which was created by the same developer as Tempe Marketplace. One interesting thing about Desert Ridge is that it is part of the larger master planned Desert Ridge community and therefore has similarly stylized apartments and office complexes adjacent to the power town, essentially making it a supersized all in one power town. Similar to Tempe marketplace, there is a similar smaller lifestyle district in the center with small retailers, restaurants, and a small stage. Finally, while it does have a smaller base of big box retailers than Tempe Marketplace, it does include more smaller and medium retailers in lieu of additional big box stores.

The final power town surveyed is Mesa Riverview which in a lot of ways strays from the power town norm that the literature review established, as Desert Ridge and Tempe Marketplace follow. This power town takes a unique format. The development further 'inland' and away from Dobson Rd takes on a more power park format which each large, big box stores like Walmart, Home Depot, and Burlington occupying an individual building alone. Further towards Dobson Rd, are the more traditional strip centers with mid-size anchors like Marshalls and Joann's sandwiched between small retailers. Right along Dobson Rd are the individual restaurant and small retail pad. Finally, on the north side is the primary touristy anchor Bass Pro shops which is right next to a small lifestyle center stylized development. It is relatively inactive, most likely due to being hidden from Dobson Rd, as figure 4.10 shows. While Mesa Riverview technically has a more power park feel, according to tax records, this development is owned and operated by one management company, but due to its vastness, it often does not feel like it. Additionally, while there is ample parking, it arguably has too much parking as the 10.2% buildings versus 89.9% parking percentages show. That percentage

is also the smallest surveyed of any retail development in any retail format, other than the gas station corner store. Finally, the poor attempt at a lifestyle wing on the north end by Bass Pro shops is anchored by a small movie theater but due to poor placement and location it seems to get little activity. There is not much entertainment/ hospitality elements in this power town as it seems more focused on selling hard goods although there is a hotel on north side and movie theater.

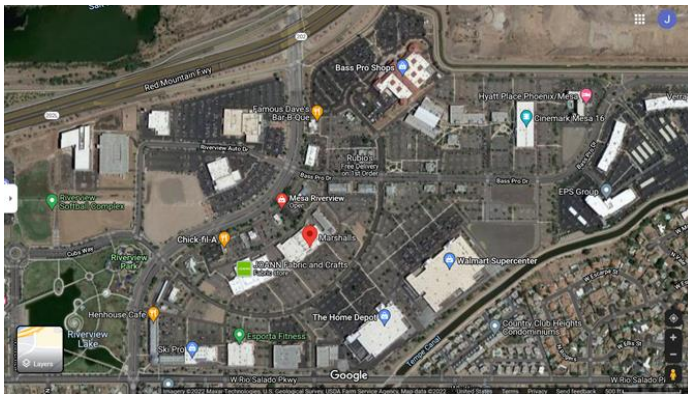


Figure 4.10: Google Maps. 2022. Mesa Riverview. Mesa, AZ. Street or Satellite Map.

In comparing all three power towns together, all are over 1 million square feet with the average being 1,807,556 sq ft. Additionally, they all include some sort of lifestyle walkable center, with a movie theater as an anchor and medium and small retail shops and restaurants in a walkable pedestrian-oriented street, as the literature review established. Regarding entertainment and hospitality, Tempe Marketplace and Desert Ridge have ample restaurants and entertainment options, including a small stage for performances, while Mesa Riverview seems more focused on shopping and selling of hard goods. Finally, many of the most popular shopping retailers are present in all these power towns, as is common with Tempe Marketplace having the most amount of shopping options.

2000s & 2010s

The final and newest retail format that will be analyzed are lifestyle centers which as the literature review established is based on the oldest retail format, main street, and the downtown core. Overall, three lifestyle centers were surveyed in the Phoenix area. The first one surveyed is Scottsdale Quarter in north Scottsdale. This retail development takes a unique approach to lifestyle centers that is clearly based on a downtown urban core, as figure 4.11 shows. Individual store fronts are located on the ground floor, with office space being located above. On the east side of the development, apartments and condos are located above shopping. There were no large anchors other than a boutique cinema and all storefronts are medium to small. Overall, this mixed-use development includes over 360,000 square feet of retail, restaurant, cinema, and entertainment uses, together with 217,000 square feet of office, 400,000 square feet of residential, totaling just under 1 million square feet. Because this center is based on an urban block, its square footage to lot ratio is 75.22% buildings versus 25% other which is the highest building to other use percentage recorded. While there are no surface parking lots, there are four free parking structures.



Figure 4.11: Google Maps. 2022. Scottsdale Quarter. Scottsdale, AZ. Street or Satellite Map.

The next lifestyle center, Kierland Commons that was surveyed is actually located right next to Scottsdale Quarter on the other side of Scottsdale Rd and is a more traditional lifestyle center, with the entire development being oriented towards a main street and a central plaza, as Figure 4.12 shows. This development differs from Scottsdale Quarter in that it is all surface parking with no parking decks with more plentiful and available parking than neighboring Scottsdale Quarter. Other than these main differences, the shopping and entertainment options are similar in both developments as will be discussed later.

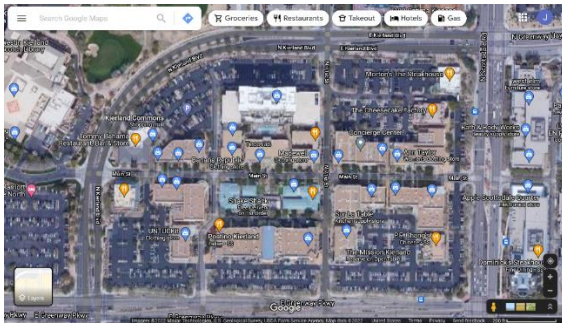


Figure 4.12: Google Maps. 2022. Scottsdale Kierland. Scottsdale, AZ. Street or Satellite Map.

The final lifestyle center that will be analyzed is the Shops at Norterra in far north Phoenix. While it is smaller in scope than the previous samples, there is a small pedestrian only shopping plaza anchored by a movie theater and a larger main street style shopping street with pedestrian walkways and on street parking. The main lifestyle center portion is clearly based on a main street format, but power towns are still clearly an inspiration in this shopping center, as figure 4.13 shows. The major difference with this lifestyle center is that it is clearly not as high end as Kierland and Scottsdale Quarter most likely due to the fact that this area does not have the same prestige and reputation as north

Scottsdale. Due to not being in wealthier Scottsdale, this lifestyle center contains more traditional big box and power town retailers which makes sense because this lifestyle center is located directly across Happy Valley Rd from a power center. Even the architectural design is more reminiscent of a power town than lifestyle centers like Kierland and Scottsdale Quarter. Finally, unlike Kierland and Scottsdale Quarter, there are no residential or office uses. One important thing that needs to be discussed is why Norterra was classified as a lifestyle center instead of a power town. The main reason is the main street style central avenue that allows cars. Power towns like Tempe Marketplace have a similar central district, but they have no vehicular access and are more stylized as an outlet center. This is clearly main street inspired, which is one of the main characteristics of lifestyle centers. If Happy Valley Town Center, a large power center on the other side of Happy Valley Rd was included in the Norterra branding, then the case could be made for the combined center being a power town like Mesa Riverview.

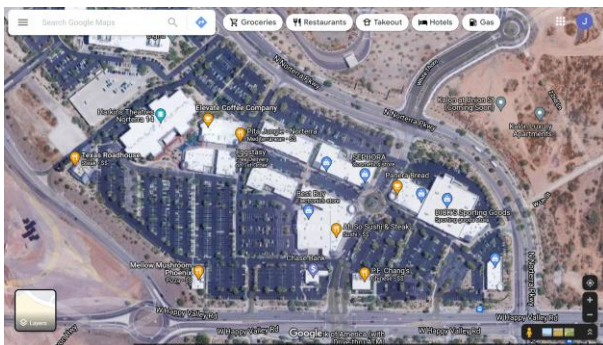


Figure 4.13: Google Maps. 2022. The Shops at Norterra. Phoenix, AZ. Street or Satellite Map.

In comparing the three lifestyle centers together, it can be seen that the major characteristics of a lifestyle center are present in all three. For example, the literature

review established that lifestyle centers need to be in areas with average incomes over \$75,000, and all of the zip codes in which these lifestyle centers are located in are in the \$90,000. Both Scottsdale Quarter and Kierland have higher end merchandise while Norterra has more common middle income big box and power town retailers. Regarding entertainment, all three lifestyle centers contain a smattering of restaurants including unique concepts as well as a few entertainment options like pottery studios and Dave and Busters. Norterra has more traditional dining options like Chipotle, while Kierland and Scottsdale Quarter has more unique and boutique restaurants. Movie theaters are often a tentpole of lifestyle centers as the literature review established, and all three lifestyle centers have a movie theater. Finally, the literature review established that lifestyle centers need to be located in areas with a population of at least 250,000. With these three lifestyle centers, the population within 10 miles is between 600,000 and 700,000 for each.

CHAPTER 5

CONCLUSIONS

There is perhaps one final aspect to discuss, and that is to tie all the retail formats together because in a lot of ways each retail format that emerged through the decades was response to consumer behavior and the retail formats that came before. To start with commercial strips and neighborhood centers they were a response to how many people were moving to the suburbs in the post war period and still needed places to shop. This is because as previously established, shopping before the post war suburban boom was typically done in urban downtown areas. It was a similar response with regional shopping centers. Their aim was to provide a similar experience and goods selection as the downtown markets. The major difference was in creating a controlled and safe environment which took the shape of large parking lots and enclosed air-conditioned walkways. Locally in Phoenix, it was these early malls that led to decades long decline of Downtown Phoenix. With corner stores, urban corner stores and bodegas were already popular in downtown urban areas, so the concept was transferred to the suburbs. The only difference was that instead of being oriented to the pedestrian, they were oriented to the vehicle and often included gas stations.

Big box and community centers were a response to the success that strip, and neighborhood centers were having in the suburbs. With the popularity of commercial strips in suburban areas, many new and emerging retailers like Walmart responded with the big box center which was essentially enlarged commercial strips or neighborhood centers. Big box retailers and especially Walmart wanted to be an all-in-one place to shop for hardware goods which explains the minimalistic warehouse design and layout of the

stores. With factory outlet centers they were a response to the increasing entertainment factor that shopping was beginning to supply and shopping as a destination. Since people often traveled great distances to shop at malls, the tourist and destination factor was important to outlet centers which was why they were often located at the edge of urban areas, which was also the case with the Phoenix outlet centers analyzed.

For power centers and power parks, with the continued popularity of the neighborhood center and big box center, it makes sense that the industry would combine big box stores into one development. This would be so that they can get as many people as possible to congregate at and shop at these centers. This is why many of the stores located in these centers tend to complement each other by focusing on similar or complementary types of products. Power towns were then the response to the success of the power centers and also a response to the increasing entertainment in the retail space. This is why many power towns included aspects like small lifestyle centers with entertainment facilities. Locally in Phoenix, places like Tempe Marketplace and Desert Ridge included retailers like Dave and Busters and small stages in a response to entertainment coming into shopping. Finally, lifestyle centers were the ultimate response to shopping as entertainment. They were built and designed from the ground up to appeal to the younger and often wealthier demographic who prioritized shopping as entertainment instead of for necessity.

In considering all of the surveyed retail developments together there are specific themes that emerge, the main one being that retail developments in general seem to be bigger than what the literature review suggested is the proper size of a development. With neighborhood and strip centers, one surveyed property was bigger than the standard

norm. Corner stores in general were bigger while regional shopping centers or malls, stayed within the established norm. Same with big box centers which often have only one big box anchor, and outlet centers. With power centers, and their agglomeration of big box stores, three of the four surveyed properties were larger in square footage than the literature review established. This trend continued with the power towns in which all three surveyed properties being above 1 million square feet, which is the maximum established. Finally, the three lifestyle centers were within the established norm. So, as it has been shown, many retail developments are larger than they would be in other areas of the country. The other main theme is the inclusion of smaller and medium size retailers in places like power parks, power towns, and big box centers. The literature establishes that many big box retailers are often isolated in their plot without other retail stores. In every single surveyed retail development surveyed that has a big box retailer there are smaller retail shops either as periphery pads/ strips or as inline shops.

Other than the size of developments, many of the retail developments fit nicely in with the retail formats that were established or popularized in each decade. This establishes that Greater Phoenix has followed the major retail format trends most likely due to Phoenix being a very car centric city which was extremely helpful in the rapid expansion of these retail formats. So, in answering the main research question of how the characteristics of retail development in Greater Phoenix have followed the national trends of retail developments that were established in each decade since the 1950s, the answer becomes that Phoenix has followed the national retail development trends and the only major differing factor in the specific characteristics are the supersizing of some retail formats, particularly power centers, power towns, and neighborhood/ strip centers.

Regarding the future of retail in general and in the Phoenix region specifically, what has not really been discussed is the impact that e-commerce has had on the retail environment. Lawrence Joseph writes in a dissertation that “E-commerce has become increasingly competitive with traditional brick-and mortar stores, especially with the rise of free shipping (Brynjolfsson et al. 2009). E-commerce has the advantage given that it reduces consumer search costs, especially for niche products which can be difficult to find” (Joseph 52). This has begun the retail phenomenon of the physical store as a showroom where goods can be tried on, instead of a warehouse where they can be bought. Joseph writes that many stores have been reducing the size of their store and having it act as a showroom that complements the website where the final purchase is made.

Locally in Phoenix this has translated into the redevelopment of many declining malls like the Metrocenter and Paradise Valley malls. These properties will be redeveloped into lifestyle centers with smaller storefronts and more office and residential units, which fits the trends of shopping as entertainment and retail as a showroom. Additionally, with these redevelopments and in general, there is more of an emphasis on the live, work, shop, all in one location that is desirable to young people. In the end this seems to be the future of retail and its response to e-commerce; to create attractive spaces where people can live, work, and shop all in one. How this develops over time in Phoenix remains to be seen, but it is clear that retail will continue to change, as Phoenix grows into one of the largest cities in the country.

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