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I: LOCAL MARKET INDICATORS

2: SITE ANALYSIS

3: COMPETITIVE RETAIL
REVIEW

4: DEMAND ANALYSIS

5: Project Positioning & Development Opportunity

6: RETAIL STRATEGY & IMPLEMENTATION





6.1 Overview

- + Retail in Downtown Yakima has already gained some momentum with the efforts of groups like the Committee for Downtown Yakima, Downtown Yakima Business Improvement District, and Block by Block (a Downtown service program that provides cleaning, safety and parking management services to the DYBID).
- + Improvements in the quality of space in Downtown, such as public art, landscaping, attractive street furnishing, and the presence of Downtown Ambassadors enhance the Downtown experience, and are a necessary step towards attracting new retailers and building a vibrant Downtown.
- + A recent local initiative by some local entrepreneurs called "I Heart Yakima" has been started to help build civic pride, build business and strengthen the local economy, by setting up a conduit through which local businesses can get a hand-up through funding, and establish a foothold in the community. This will be an important driver for retail revitalization in Downtown Yakima.
- + Moving forward, a retail development strategy must take a focused and practical approach for building a vibrant and sustainable Downtown Yakima, that builds on Yakima's existing assets, nascent local business initiatives and events, and can provide a unique and enjoyable retail experience not otherwise available in Yakima.
- + Concerted effort must be made by the City in stakeholder engagement, marketing, City policies that incentivize and direct retail growth to the Downtown, and funding / sponsorship opportunities.















6.2 Implementation Strategies

- + Riding on the momentum already taking place for Downtown Yakima's revitalization so far, early implementation of some specific strategies to encourage retail development and enhancement in the Downtown need to be carried out.
- + Some of these strategies could be initiated quickly, with little cost, yet have a significant effect on strengthening the image of the Downtown and creating a vibrant and attractive environment.
- + The following strategies should be considered / supported by the City:
 - + Set up of a Retail Task Force
 - + Retail Incubation: Pop-up retail / short term leasing / arts in windows
 - + Temporary use of underutilized parking lots
 - + Retail development incentives
 - + Marketing
 - + Targeting specific tenants and businesses

6.2. I Setting up a Retail Task Force

- + The City of Yakima should consider setting up a dedicated Retail Task Force that takes a proactive role in promoting and facilitating retail growth in the Downtown.
- + The main role of the Retail Task Force should be, at minimum, to undertake the following:
 - + Take a proactive role in marketing and promotion of Downtown Yakima;
 - + Stakeholder Engagement:
 - + engage with local real estate professionals, developers and property owners to understand issues and concerns related to retail development in Yakima, and to encourage flexible and innovative approaches to retail leasing strategies (eg. short term leasing);
 - + Other key stakeholders to engage include Committee for Downtown Yakima, Rotary, Chamber of Commerce, community groups
 - + Facilitate the planning process for retailers wanting to locate in Downtown. This should be extended to both local retailers and non-local retail businesses.:
 - + Draft and recommend policies for the City that facilitates retail development in Downtown (eg review of building/design codes to make it easier for retailers to locate in the Downtown);
 - + Support City initiatives in direct recruitment of retail activities (eg. attending national retail trade shows).



6.2.2 Retail Incubation

Retail Incubation

- + Yakima's abundance of vacant shops and storefronts provides the opportunity to rapidly implement schemes that will create momentum for urban renewal in Downtown Yakima. Activating empty shops and dressing up storefronts will help to reinvigorate the downtown experience and create a vibrant, positive pedestrian environment.
- + Retail incubation is generally encouraged to provide low-rent space and business support services for entrepreneurs, and to attract a certain tenant mix that encourages customer visits to a specific area, like the Downtown.
- + Various approaches can be considered for retail incubation, that include the following:
 - + Favourable rents
 - + Flexible leasing terms
 - + Business coaching assistance
 - + Use of vacant storefronts for short-term occupation to test out new ideas
- + The City, possibly through a retail task force, will need to engage directly with real estate professionals and developers to encourage and support such schemes.

Types of Retail Incubators

Type	Pop-Ups	Floating	Incubator
Description	Temporary space to reduce chronic or rising vacancy and bolster retail in an area	Assistance to retailers to locate in a district and receive specialized training	Encourage start-up retail businesses through discounted space, shared supplies and training
Retail Firms Served	Established	Established/Start- Up	Start-Up
Location	Willing building owner with long- term vacant space	Wherever retailer chooses in a defined district	Specialized operating facility
Services	None	Training/Mentoring	Training and other assistance as needed
Supplies	None	None	Shared- internet, accounting, etc.
Possible Subsidies	Rent, Tenant improvements (temporary)	Rent, Training	Rent, Supplies, Training
Occupancy Time	1-3 months	12-18 months	18-36 months
Challenges	Finding willing owners, return policy for temporary stores	Establishing training and operating guidelines	Generating foot traffic, suitable "graduate" space, managing public areas of incubator
Management	Public-Private partnership	Private space, public subsidy, training provided by local agencies	Public or private, professional manager and business assistance required





6.2.2 Retail Incubation

Pop-Up Retail

- + An emerging and innovative retail trend capable of providing flexible retail space, pop up retail would be ideally suited to Downtown Yakima. Pop-up retail is suitable for both small emerging retailers who want to test out ideas and products, as well as well-established retailers who need extra space to either sell off extra product or for certain retail events.
- + Pop up retail concentrated within Zone I, where much of the existing empty stores are located, would create more contiguous retail experience, filling many of the vacant storefronts, and encouraging footfall to the downtown.
- + Pop up retail delivers an exciting and creative retail experience for consumers without the need for retailers to make long term commitment.

Arts In Windows

- + By creating art displays in windows Downtown Yakima will alleviate the negative association of empty storefronts and help create a more positive and interesting perception of Downtown Yakima.
- + Such as strategy also helps to provide exposure to local talent and business.













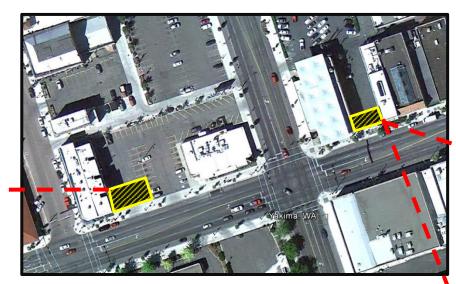


6.2.3 Temporary Use of Underutilized Parking Lots

Temporary Use of Underutilized Parking Lots

+ Whilst adding to the streetscape of Downtown Yakima, many of the patios that line the streets are either located along highly trafficked roads or restrict pedestrian movement and encroach onto sidewalks. Moving these patios off sidewalks and into underutilized and street-fronting parking lots would help to stitch the retail fabric together to a more contiguous experience along Yakima Ave, enhance the vibrancy and visibility of activity, and enhance the pedestrian experience of Downtown Yakima.









Example of a restaurant patio extended into the open space at the side, rather than taking up space on the front sidewalk (Napa, California)









6.2.4 Retail Incentives

Incentivizing Development

As suggested in Section 4.14, a conscious effort needs to be made to capture new retail growth and direct it to downtown, as a way to breathe new life into Downtown Yakima. Suggestions of how this could be initiated include;

- + Implementation of planning policy to encourage retail growth into Downtown Yakima. With a target of capturing 25% of new retail growth for the Downtown, this could be as high as 50,000sf per annum, based on the demand, and will help to build up a critical mass of retail growth within the downtown.
- + Financial incentives should be made available for the restoration of heritage buildings. These buildings reflect Yakima's history and act as an attraction in themselves, particularly to tourists. Significant regeneration projects that incorporate ground floor retail and enhance the pedestrian environment through active retail fronts should be given grants or low interest loans to encourage investment.
- + Liaising with landlords and brokers to provide discounted rates for new tenants through a retail incentive scheme would provide the opportunity to a wave of entrepreneurs and business start ups, as well as enticing more established retailers to start operating in downtown Yakima.

Suggested Retail Incentives

Incentive	Description
Retail building improvement loans / grants	No interest loans to cover a percentage of the cost of eligible interior / exterior improvement works
Revitalization Grants	A financial incentive that reduces the property tax increase that can result from development improvement works. Can also help to assist in securing project funding.
Planning Application Fees Grants	Grant is offered only once the development has been completed and all inspections been completed and permits granted.
Public Art Grants	For murals, sculptures, paintings, local heritage based art pieces and displays, interpretive and interactive art pieces and displays.



6.2.5 Marketing

- + It is very important that upon adoption of the Downtown Master Plan, that the City's incentive programs and its role be effectively communicated to property owners, business owners, developers, and potential tenants/end users.
- + The purpose of marketing is to proactively and regularly advertise and market the City's Master Plan, planned improvements, and incentives programs, as well as other actions taken by the City itself to support the Downtown revitalization.
- + The City should budget for and implement a Marketing Strategy that:
 - + Provides direction to the public on how to obtain information on available incentive programs, including guides, forms as well as assistance that is available from the City
 - + Informs property owners, business owners and developers with regards to the actions planned by the City to improve the investment environment
 - + Publicizes recent development and business activity and success stories
- + Target Audience business owners, developers, real estate brokers, business associations, banks and other lending institutions, planners and architects, general public

+ Marketing Tools

- + Multi-media publication (newsletters, City of Yakima "Newroom" webpage)
- + Stories in local news featuring improvements, processes, or success stories
- + Periodic presentations / town hall meetings
- + "Road trips" City staff to attend real estate / retail trade shows, such as the International Council of Shopping Center's annual Retail Conference (RECON) to advertise that Yakima is Open for Business
- + Through established business associations and grass roots groups such as "I Heart Yakima" help fund the creation of "Visit Yakima" literature/advertisement that showcases local retailers and businesses and is targeted towards regional tourists.











6.2.6 Target Tenant Types and Businesses

- + A retail development incentive can be linked to a merchandise "wish list", which targets a particular type of tenant and retail mix, and which should be focused on street-oriented retail.
- + To build on Yakima's existing strengths, and create visibility, identity, vibrancy, and local convenience the following retail types should be encouraged initially:
 - + Full-service restaurants
 - + Cafes
 - + Produce market
 - + Specialty food and beverage (delis, bakeries, butchers, fish mongers, wine bars and shops
 - + Locally based bespoke apparel / artisan shops
 - + Florists
 - + Art galleries / emporiums
 - + Services (dry cleaners, tailors, shoe repair, salons) on secondary streets
- + What NOT to encourage:
 - + Banks
 - + Large format "big box" chain retailers
 - + Fast food and "corner stores" (especially in prime retail locations)
 - + Flectronics
 - + More surface parking lots!

TOP US BRANDS

Food and Beverage

Rank	Company / Headquarters	Sales Growth ('11 v '10)	USA Retail Sales (000)
1	Five Guys / Lorton , Va.	48.0%	921,000
2	Jimmy John's / Champaign, III.	28.3	953,000
3	Chipotle Mexican Grill / Denver	23.5	2,261,000
4	BJ's Restaurants / Huntington Beach, Calif.	20.8	621,000
5	Cheddar's Casual Café / Irving, Texas	20.5	438,000
6	Buffalo Wild Wings / Minneapolis	19.8	2,040,000
7	Panda Restaurant Group / Rosemead, Calif.	17.1	1,457,000
8	Noodles & Company / Broomfield, Colo.	17.0	304,000
9	Wingstop Restaurants / Richardson, Texas	16.4	361,000
10	Chick-fil-A / Atlanta	13.1	4,051,000
11	Panera Bread Company / St. Louis	12.8	3,396,000
12	Papa Murphy's / Vancouver, Wash.	10.0	694,000
13	Dunkin' Brands / Canton, Mass.	8.7	6,428,000
14	Culver Franchising System / Prairie du Sac, W	is. 8 .2	718,000
15	Darden Restaurants / Orlando	8.1	7,905,000

Grocers

Company	2011 Sales (000)	2010 Sales (000)
Kroger	\$76,992,000	\$70,213,000
Costco	62,215,000	57,183,000
Dollar General	14,757,000	13,035,000
H-E-B	16,820,000	15,036,000
Walgreen	64,951,000	60,962,000
Whole Foods Market	9,794,000	8,736,000
Publix	26,606,000	24,779,000
Dollar Tree	6,533,000	5,803,000
Aldi	9,218,000	8,362,000
Wakefern / ShopRite	12,800,000	11,800,000
BJ's Wholesale Club	11,707,000	10,805,000
Wegman's Food Markets	6,199,000	5,599,000
Family Dollar	8,548,000	7,867,000
Safeway	36,497,000	34,605,000

Source: Kantar Retail

Soft Goods

Company	2011 Sales (000)	2010 Sales (000)	2
Nordstrom	\$9,364,000	\$8,560,000	
Ross Stores	8,605,000	7,860,000	
Limited Brands	4,567,000	4,024,000	
Michael Kors Holdings	521,000	315,000	
Genesco	1,853,000	1,595,000	
Foot Locker	2,615,000	2,348,000	
Lululemon Athletica	416,000	259,000	
Chico's	1,985,000	1,768,000	
DSW	1,942,000	1,749,000	
Ralph Lauren	1,607,000	1,433,000	
Neiman Marcus	3,278,000	3,041,000	
American Eagle Outfitters	2,656,000	2,454,000	
Ann Inc.	1,964,000	1,791,000	
Ascena Retail Group	2,857,000	2,690,000	
Belk	3,663,000	3,489,000	
Burlington Coat Factory	3,837,000	3,658,000	





6.2.6 Target Tenant Types and Businesses

With an increase in retail activity and enhanced identity and image in Downtown Yakima, by Phase 2 Yakima is expected to become an attractive setting for national retailers to return to. The tables below provide an overview of popular and potential retailers that could be considered for the Downtown Yakima, and their existing presence in Yakima and the surrounding region helping to identify target retailers that would align with the Downtown's retail positioning.

				Loca	ntion		
Apparel	Price Point	Seattle	Portland	Yakima	Downtown Yakima	Tricities	Spokane
Abercrombie & Fitch	Premium	Yes	Yes	No	No	Yes	No
Aeropostale	Mid-Market	Yes	Yes	Yes	No	Yes	Yes
ALDO	Mid-Market	Yes	Yes	No	No	No	No
American Apparel	Premium	Yes	Yes	No	No	No	No
American Eagle Outfitters	Mid-Market	Yes	Yes	Yes	No	Yes	Yes
Anthropology	Premium	Yes	Yes	No	No	No	No
Banana Republic	Premium	Yes	Yes	No	No	No	No
The Body Shop	Mid-Market	Yes	Yes	No	No	Yes	Yes
Chico's	Mid-Market	Yes	Yes	Yes	No	Yes	No
Champs Sports	Mid-Market	Yes	Yes	No	No	No	No
Eddie Bauer	Mid-Market	Yes	Yes	No	No	Yes	Yes
Express	Mid-Market	Yes	Yes	No	No	No	No
Foot Locker	Mid-Market	Yes	Yes	Yes	No	Yes	Yes
Forever21	Mid-Market	Yes	Yes	No	No	No	Yes
Foreign Exchange	Mid-Market	No	No	No	No	No	No
Gap	Mid-Market	Yes	Yes	No	No	Yes	Yes
Guess	Premium	Yes	Yes	No	No	No	No
Gymboree	Mid-Market	Yes	Yes	Yes	No	Yes	Yes
H&M	Mid-Market	Yes	Yes	No	No	No	No
JC Penney's	Department	Yes	Yes	Yes	No	Yes	Yes
Hollister	Mid-Market	Yes	Yes	No	No	Yes	Yes
Journey's	Mid-Market	Yes	Yes	Yes	No	Yes	Yes
Lids	Mid-Market	Yes	Yes	No	No	Yes	Yes
Macy's	Department	Yes	Yes	Yes	No	Yes	Yes
Nordstrom	Department	Yes	Yes	No	No	No	Yes
Nordstrom Rack	Premium	Yes	Yes	No	No	No	Yes
Papaya	Mid-Market	Yes	Yes	No	No	No	No
Sears	Department	Yes	Yes	Yes	No	Yes	Yes
Sunglass Hut	Mid-Market	Yes	Yes	No	No	Yes	Yes
Urban Outfitters	Premium	Yes	Yes	No	No	No	No
Vans	Mid-Market	Yes	Yes	No	No	Yes	Yes
Victoria's Secret	Premium	Yes	Yes	No	No	Yes	Yes

		Location					
F&B Vendors	Price Point	Seattle	Portland	Yakima	Downtown Yakima	Tricities	Spokane
Arby's	Fast-Food	Yes	Yes	Yes	No	Yes	Yes
Applebee's	Mid-Market	Yes	Yes	Yes	No	Yes	Yes
Baja Fresh	Fast-Food	Yes	Yes	No	No	No	No
Ben & Jerry's	Fast-Food	Yes	Yes	No	No	No	Yes
Burger King	Fast-Food	Yes	Yes	Yes	No	Yes	Yes
Burgerville	Fast- Casual	No	Yes	No	No	No	No
California Pizza Kitchen	Fast-Casual	Yes	Yes	No	No	No	No
The Cheesecake Factory	Fast-Casual	Yes	Yes	No	No	No	No
Chili's	Fast-Casual	Yes	Yes	No	No	No	Yes
Chipotle	Fast-Food	Yes	Yes	No	No	No	Yes
Cinnabon	Café	Yes	Yes	No	No	No	Yes
Elmer's	Fast- Casual	Yes	Yes	No	No	No	No
Fatburger	Fast-Casual	Yes	No	No	No	No	Yes
Five Guys Famous Burger and Fries	Fast- Food	Yes	Yes	No	No	Yes	Yes
Garlic Jim's	Fast- Casual	Yes	No	No	No	No	No
Jack in the Box	Fast- Food	Yes	Yes	Yes	No	Yes	Yes
Jamba Juice	Fast- Food	Yes	Yes	No	No	No	Yes
McDonalds	Fast- Food	Yes	Yes	Yes	No	Yes	Yes
Olive Garden	Fast-Casual	Yes	Yes	Yes	Yes	Yes	Yes
Old Spaghetti Factory	Fast- Casual	Yes	Yes	No	No	No	Yes
Outback Steakhouse	Fast-Casual	Yes	Yes	Yes	No	Yes	Yes
Panera Bread	Café	Yes	Yes	No	No	No	No
Panda Express	Fast-Food	Yes	Yes	Yes	No	Yes	Yes
P.F. Chang's	Fast- Casual	Yes	Yes	No	No	Yes	Yes
Sbarro	Fast- Food	Yes	Yes	No	No	No	Yes
Starbucks	Café	Yes	Yes	Yes	No	Yes	Yes
Wetzel's Pretzels	Fast- Food	Yes	Yes	No	No	No	Yes
Yogurtland	Fast- Food	Yes	Yes	No	No	No	Yes







6.2.7 Tenant Types and Sizes

Typical retail shop sizes for various retail tenant types are shown in the table below:

Retail Type	Use	Typical Floor Area (avg)
Anchor	Grocery / Supermarket	25, 000 - 50,000 sf
Anchor	Drug Store / Pharmacy	20,000 sf
Anchor	Liquor Store	7,000 sf
In-line	Restaurants	5,000 - 10,000 sf
In-line	Coffee Shop	1,500 - 3,000 sf
In-line	Bakery	1,500 - 3,000 sf
In-line	Deli	4,000 sf
In-line	Boutique Fashion	5,000 sf
In-line	Butcher / Fish shop	4,000 sf
In-line	Hair Salon	1,500 sf
In-line	Barber	I,000 sf
In-line	Dry Cleaner	1,500 sf
In-line	Medical/Dental Clinic	10,000 sf
In-line	Florist	I,000 sf





6.3 Other Important Considerations

Landscaping

- + An abundance of parking lots currently creates both a physical and psychological barrier to pedestrians in Downtown Yakima. Repurposing these lots to have active uses, or using landscaping to create a more pleasant environment for pedestrians is vital to increasing demand for downtown retail.
- + Widening sidewalks and using softscaping to provide a more pedestrian scale environment including trees to deliver shade from climatic extremes will help to encourage walking throughout the downtown and create a safer and more enjoyable experience.
- + Utilizing sculptures and art work inspired by Yakima's heritage by local designers will create visual landmarks reinforcing Yakima's sense of identity and creating a sense of excitement for travelers arriving in Downtown Yakima.
- + Ultimately, the more attractive, appealing and comfortable the public realm in the Downtown is, the more people will be drawn to visit and linger. People will be drawn to the Downtown just because it is a great place to hang out, which then creates energy and vitality, and with that the greater the opportunity for retail emerges.















6.4 Recommended Actions

The following are recommended actions to be taken immediately by the City to encourage retail revitalization in the Downtown:

- + Set up a Retail Task Force to support the City's efforts in promoting and facilitating retail growth in the Downtown.
- + Embed the Retail Positioning Framework suggested in Section 5.3 into the Downtown zoning ordinance and design guidelines to ensure a distinctive retail environment for the Downtown can be realized.
- + Establish policies and criteria that provide a framework for incentives for the establishment and revitalization of retail developments / businesses within the Downtown. The City should seek to obtain the buy-in of such incentives from local banks to support incentives that involve no-interest loans for eligible businesses.
- + Engage and encourage local landlords / real estate professionals to support retail incubation ideas through the offering of short-term and/or discounted lease terms. This can be facilitated through a Retail Task Force.
- + Facilitate the temporary use / lease of underutilized parking and other vacant lots within the study area for expansion of existing retail operations (esp F&B) that abut such lots.
- + Publicize the Downtown Yakima Master Plan and proactively engage in specific marketing strategies aimed at key stakeholders / real estate professionals / investors / retailers to promote the Downtown Yakima Master Plan. This should include attendance by City officials at retail conferences / trade shows, such as the annual Retail Convention (RECON) in Las Vegas.
- + Identify potential sponsors / sponsorship opportunities to support the implementation of a key catalyst project, such as the expansion of Millennium Plaza Park.



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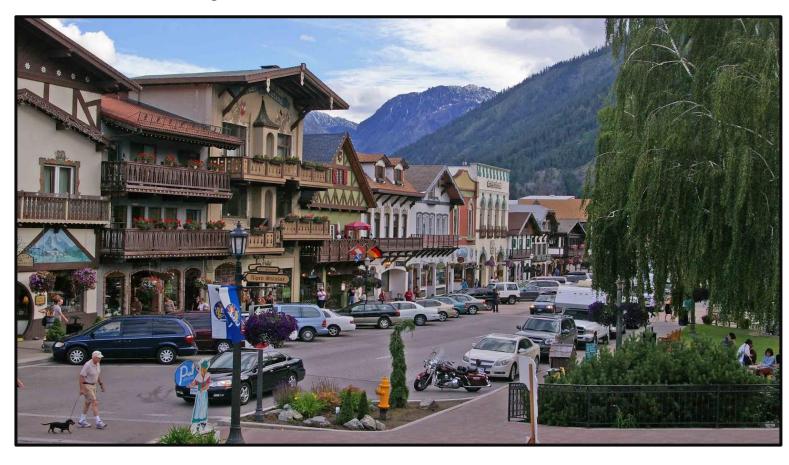






A. Leavenworth- Washington

- + Less than two hours north of Yakima, Leavenworth recreated itself as a Bavarian themed village in the 1960's after decline in traditional industries.
- + Although small with a population of 2,000, Leavenworth manages to attract 2.5 million people a year with 1,528,000 nights stayed in hotels/ motels in 2012 compared to Yakima's 849,000 nights.
- + Traffic is calmed throughout Leavenworth with angled on street parking.
- + The character of the city is preserved through extensive coding including a dedicated design review board.
- + Leavenworth is primarily devoid of national retailers with the exceptions of MacDonald's, Starbucks and Safeway, all of which having to adapt their "cookie cutter" format to adhere to coding.



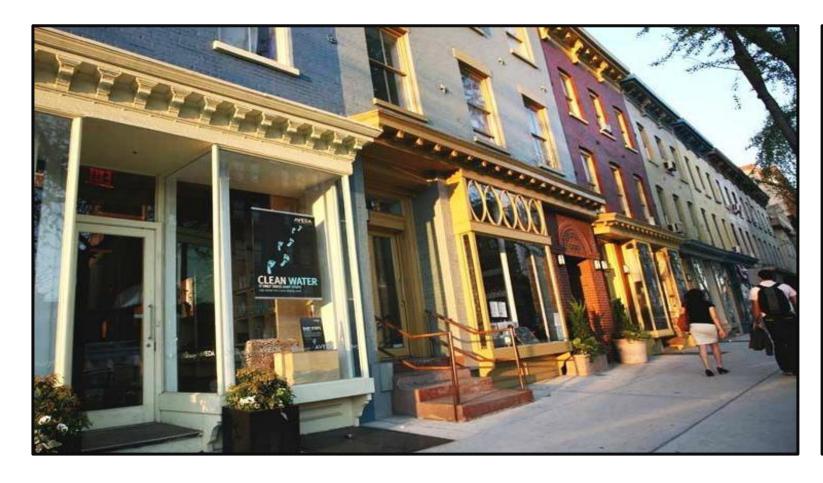








- B. Atlantic Gardens- Brooklyn, New York
- + Located within downtown Brooklyn, Atlantic Gardens has acted as a catalyst for retail development in the area.
- + Utilizing innovative techniques such as "pop up" stores, art instillations and scheduling events in vacant retail units in order to create a buzz and strengthen community.
- + Increased rental rates from \$10-15sf to \$50-70sf over five year period.
- + Creation of high quality public green space has helped act as an anchor and created income through use as an events space for residents and retailers.









APPENDIX – CASE STUDIES

C. Downtown Rochester- Rochester, Michigan

- + Implemented in 2000, Rochester's Downtown Development Authority has revitalized their small Detroit suburb into a vibrant center for retail and tourism.
- + In thirteen years vacancy rates were reduced from 38% to 4% with over 350 shops, restaurants, salons and services, 85% of which are independent merchants.
- + Recent "Main Street Makeover" introduced improved pedestrian design including high quality street furniture, public art, widened pedestrian sidewalk helping to win the city the 2013 Great American Main Street Award.









APPENDIX – CASE STUDIES

D. Coronado Main Street-Coronado, California

- + Started in 1988, "Coronado MainStreet" revitalization program has helped transform an ailing Main Street with over 35% vacancy rates into a vibrant, successful retail and leisure district.
- + A variety of strategies have been used including façade improvements of heritage buildings, renovation of a theater and the creation of a palm tree lined meridian in order to add destination appeal to Orange Avenue.
- + Within the first ten years of programming 62 businesses moved to the area creating 619 jobs and increasing sales tax revenues 93% and lowering vacancy rates to almost zero.







APPENDIX - CASE STUDIES



E. Paducah- Kentucky

- + Launched in 2000, Paducah's "Artist Relocation Program" has helped to reinvent Paducah's downtown into a creative community, attracting over 70 artists, which has in turn acted as a catalyst for development and bought over 200 new businesses downtown and created over 1,000 jobs.
- + Various incentives used to entice business development including the City's support to businesses such as helping retailers market nationwide and help building websites.
- + Independent specialty stores, galleries, restaurants and cafes have flourished in Paducah, which now boasts a yearly tourism income of \$200 million.











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