

Appendix G

Suburban Vibrant Centers and Their Comparables

We define vibrant centers as compact, employment-oriented areas of development or redevelopment with multiple connected land uses. They are higher density, more walkable, and far less auto dependent than typical suburban locations.

Vibrant centers can be defined more precisely by drawing from the published literature. Major contributors to this literature include Julie Campoli, Robert Cervero, Reid Ewing, Robert Fishman, Christopher Leinberger and Emily Talen.

Vibrant centers have the following characteristics:

- **Compact.** The center is coherent, bounded and dense (within its regional context), with commercial buildings of two stories or more.
- **Mixed Use.** Two or more uses can be found within multistory buildings, which typically feature retail space below residential and/or office space.
- **Multiple Use.** Different types of land uses (residential, commercial, industrial and/or institutional) are located in close proximity to provide needed goods and services and generate activity throughout the day and evening.
- **Walkable.** The urban design — including street patterns, intersection density, block lengths, street and sidewalk widths, building massing, setbacks, street-wall facades and parking — facilitates safe, convenient pedestrian movement.
- **Connected.** Trips to and from the center typically are feasible by transit, either rail or bus, as well as by car; internal trips are feasible by walking or bicycling.

- **Parking.** Metered street parking and parking structures accommodate private vehicles.
- **Density.** Job density is high; a combination of workers, residents and visitors/shoppers enlivens the center during the day and evening. High-density residential development is especially important to provide workforce housing and the purchasing power to support retail and personal services.
- **Public Places.** Open space within the center is public and available for special events, people watching, rest and relaxation.
- **Destination.** The center is an employment node with unique public venues that are popular places to socialize and conduct business.
- **Discrete.** The center has edges and boundaries that capture and contain additional development and redevelopment over time.
- **Critical Mass.** Additional development is a positive feature, because greater density usually increases vibrancy.

These characteristics help clarify the meaning of vibrant centers. However, not every suburban vibrant center included in this research meets every criterion.

Vibrant centers can be found in all parts of metro areas, from the center to the periphery. A viable CBD typically is a region's largest and, often, its strongest vibrant center. Many vibrant centers are connected by public transit (rail or bus), but others can be reached only by car.

Identification of Suburban Vibrant Centers and Their Comparable Submarkets or Office Parks

Published work, expert advice and personal knowledge led to our identification of the suburban vibrant centers included in this analysis. The Urban Land Institute (ULI), the Brookings Institution, the U.S. Environmental Protection Agency, and Smart Growth America and other smart growth organizations publish useful information. The experts consulted are listed in Appendix H. The research team's personal knowledge came into play in identifying vibrant centers in Albuquerque, New Mexico, Atlanta, Birmingham, Alabama, the New York area, North Carolina markets and Washington, D.C.

Suburban vibrant centers include redeveloped suburban office parks and retail centers. Area experts also identified another type of suburban vibrant center: downtown areas (town centers) in smaller towns and cities that have become part of larger metro areas. These core areas have managed to survive the competition from highway-oriented development. They are now thriving as a result of factors that include good urban design, solid building construction and reliable rail transit as well as consistent leadership and nearby affluence. Vibrant suburban centers served by rail transit include both suburban redevelopment and established town centers.

Suburban vibrant centers described in publications or nominated by area experts were qualified for inclusion in the analysis by using the following process:

- An Internet search was conducted to find a current description of the suburban vibrant center; most had URLs. This search qualified the place and identified a central address/ intersection and ZIP code.
- Google Earth was used to survey the area visually. Geographic features, street patterns, key landmarks and centrally located commercial establishments were noted. In some instances, Google Maps was used to take a visual tour of the area, to get a better sense of its walkability and design.
- The private Walk Score website, www.walkscore.com, was used to determine the Walk Score for each suburban vibrant center, using the center's address and ZIP code. Walk Scores range from zero to 100; each location's score is based on the location's distance from various destinations, including restaurants, bars, coffee shops, grocery stores, parks, schools, shopping, entertainment, banks, etc. If the distance from the location to the destination is within a quarter mile, the maximum score is assigned; if the destination is one mile or farther away, the location is given a zero score for that destination. The Walk Score is the unweighted sum of these destination-specific scores.
- Walk Scores for established town centers were expected to be higher than those for redeveloped suburban office parks and retail centers because they had many more years to reach critical mass. In the second analysis, the Walk Score threshold for suburban redevelopment was 75; the threshold for town centers was 85. Reston Town Center, with a Walk Score of 83, is slightly below that threshold, but was included because its town center, added in the 1990s, was much newer than the core areas of other town centers.
- A central intersection or address was identified for each vibrant center. The half-mile radius from this point formed the vibrant center's circular area. The data were compiled for all vibrant centers, which had to have at least 500,000 square feet of office space. Only one, Southlake Town Square in the Dallas suburbs, needed to be enlarged beyond the half-mile radius to capture more than 500,000 square feet of office space in the second analysis.

The suburban vibrant centers identified in this research are listed below by major city. The Walk Score is given (in parentheses) for each of the centers included in the second analysis, which examined 21 suburban redevelopment/infill development centers and 21 established town centers. Suburban vibrant centers are listed with their comparable suburban office park. Established town centers are listed with the surrounding area or submarket to which they were compared. The rule was that the submarket containing the core area should be at least twice as large as the town center to be used as the comp. Otherwise, additional proximate suburban space was added or used instead.

Several redevelopment/infill development centers could have been justifiably classified as established town centers. Because we consider them suburban relative to the larger market in which they were located, we treated them as suburban redevelopment/infill development and compared them to suburban office parks. CityPlace, a well-known redeveloped center that is defined as a suburban redevelopment even though it is quite near downtown West Palm Beach, is one example.

The process for selecting comps for suburban vibrant centers was rigorous:

- The market cluster and submarkets, including the suburban vibrant center, were identified, and the CoStar “Map” function was used to scan potential comps.
- Submarket properties were searched using “Existing Office over 100,000 SF” in the CoStar database to find suburban office parks. One prominent building in the office park was identified as its center, and that building’s address was used to define the area.

- The “Radius” function was used to pull the data for the half-mile circle around that address. In most instances, other candidate office parks were compared to the selected comp to be sure its performance was not aberrant. *In fact, most comps performed better than the suburban average, thus providing strong competition for the vibrant centers.*
- In conducting the search for comps, five criteria were applied with the following priority order:
 1. The comp had to be in the vicinity of the vibrant center, with similar regional access for commuters.
 2. The comp had to represent typical, low-density, auto-oriented office space.
 3. The Walk Score for the comp had to be below 75 (preferably far lower).
 4. The identified properties had to be part of a defined office park or corridor.
 5. The comp had to be at least as large as its corresponding vibrant center.

First-tier Markets

The following 28 vibrant centers were identified in first-tier markets and analyzed in the suburban vibrant center-suburban office market comparisons. Each center name is followed by its Walk Score (in parentheses) and its suburban comp. In some cases, a Walk Score is provided for the comp as well.

Atlanta:

Downtown Decatur (88)	Northlake/Lavista and Stone Mountain (submarkets)
Buckhead Station (75)	Upper Buckhead (submarket)

Five candidate vibrant centers were evaluated. Atlantic Station and Edgewood District are too close to downtown to be considered suburban. The new urbanist development known as Glenwood, which has a Walk Score of 74, is just south of I-20 and too close to downtown. Decatur is an established town center; Buckhead Station represents suburban redevelopment. Both are served by rail transit.

The core area of Decatur was not compared to the rest of the Decatur submarket, because these office properties are part of urban Atlanta and within its loop highway, I-285 (Perimeter). The comp combined two suburban submarkets to capture properties around I-285 (Perimeter Center) to the east of Decatur: Northlake/Lavista and Stone Mountain.

Buckhead Station, with almost 10 million square feet of office space, is the largest of all of the suburban vibrant centers examined. Suburban office space in its vicinity was examined. These properties are in the Upper Buckhead or Lower Buckhead submarket. Instead of selecting one office park, we selected the remainder of the Upper Buckhead submarket as the best comp. It has about the same amount of office space, with a similar office inventory, and is more suburban in character than Lower Buckhead.

Bay Area:

Oakland: Walnut Creek core (92)	Camino Ramon Office Park (82)
San Francisco: San Mateo core (91)	Peninsula Office Park (60)
San Jose: Santana Row (78)	West Valley Corporate Center (58)

These three centers are better examples of suburban vibrant centers than Menlo Park, which has a lower Walk Score (62); downtown Palo Alto (87), which is university dominated; or Emeryville, which is close to downtown Oakland. Walnut Creek and San Mateo are also transit-oriented town centers. They are considered suburban, relative to Oakland and San Francisco, and compared to auto-oriented office parks.

Despite its relatively high Walk Score, Camino Ramon Office Park in San Ramon is a very good comp for Walnut Creek. It is larger and better performing than the next best alternative, Bishop Ranch Office Park in Concord.

Peninsula Office Park is an excellent comp for the San Mateo core. It is a typical suburban office campus just off Highway 92 in the Corridor/Highway 92 submarket. Its moderately high Walk Score is a result of its proximity to the College of San Mateo, which creates demand for convenience retail in the vicinity but cannot be easily accessed on foot.

Seven possible comps were examined to find one for Santana Row. Five had Walk Scores that were too high. West Valley Corporate Center (58) in Campbell, which has about the same amount of office space as Santana Row, was determined to be a better choice than Creekside Business Mall (71).

Boston:

Lowell core (100)	Lowell/Chelmsford (submarket)
Somerville core (91)	Somerville/Everett (submarket)
Waltham core (98)	Waltham/Waterford (submarket)

Newton, Brookline, and other suburban areas are not as strong as the three suburban vibrant centers selected, all of which were compared to the office space in their surrounding submarkets. The comps were calculated as the submarket minus the vibrant town center, which was the usual procedure for all established town centers.

Chicago:

Downtown Evanston (92)	Near North (submarket)
Highland Park (85)	Central North (submarket)
Oak Park core (92)	Oak Park Area (submarket)

Numerous other potential transit-served areas have lower Walk Scores or are too close to downtown Chicago. One new development, The Glen, is too small and has a Walk Score of 69. Market Square, one of the region's original mixed-use developments, has 365,000 square feet of office space and a Walk Score of only 74, surprisingly low for a transit-served center that is almost 100 years old.

The Near North and Oak Park Area submarkets have more than two times the RBA as their respective core areas. The remaining amount and location of space in these submarkets made them good comps. The entire Central North submarket was used as Highland Park's comp because the center represents only 2 percent of that submarket.

Dallas-Fort Worth:

Southlake Town Square (78)	Westlake Campus (28)
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Two other vibrant centers were evaluated in this area. Addison Circle has a Walk Score of 62; Legacy Town Center in Plano's Walk Score is 60. Westlake is an excellent comp for Southlake. It is in the same submarket, Westlake/Grapevine, and, like Southlake, is adjacent to Southwest Parkway.

Houston:

The Woodlands Town Center (86)	Greenspoint Mall (48)
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The Woodlands and Sugarland (77) are in the same part of the Houston market. The Woodlands was chosen because it is larger and has a higher Walk Score. Greenspoint was recommended as a good comp for The Woodlands. The area within a half-mile radius of the mall contains about 1.5 million square feet of RBA, about half that of the Woodlands.

Los Angeles:

Culver City (79)	Park Place (69)
Old Town Pasadena (92)	Pasadena/Arcadia/Monrovia (submarket)
South Coast Town Center (80)	Colton Lake Center (58)

Numerous candidate vibrant centers were evaluated in the LA region. Century City, Santa Monica and Westwood were excluded because they are unique. Others are too close to downtown LA or, in one instance, in downtown Long Beach. Both the Pasadena and Glendale core areas are vibrant, but Old Town Pasadena is the better choice. South Coast Town Center, located in Orange County, is both larger and has a higher Walk Score than Valencia (74). Culver City is sufficiently suburban in the context of the LA market to be compared to auto-oriented office locations in its vicinity.

Park Place in the Culver City submarket was selected as Culver City's comp. The area has twice as much RBA (2.3 million square feet) and an acceptable Walk Score. It was better than five potential comps that were examined. Old Town Pasadena, which accounts for 46 percent of its submarket, was compared to the rest of the surrounding submarket. Colton Lake, on the border of Santa Ana and Costa Mesa, off I-405, was the comp selected for South Coast Town Center.

New York City:

Morristown, New Jersey (94)	Park Avenue at Morris County (28)
Red Bank, New Jersey (92)	Middletown (09)
Stamford, Connecticut (98)	Stamford submarket
White Plains, New York (91)	East I-287 (submarket)

Seven potential vibrant centers were evaluated for the New York area. Hoboken, New Jersey, is far too urban and close to Manhattan; Greenwich, Connecticut, is too upscale and unique. Morristown meets the criteria and is a better alternative than New Brunswick, New Jersey, which would have had to be considered an established town center. Morristown and Red Bank are classified as suburban development and therefore compared to office parks or corridors. Stamford and White Plains are clearly much larger established city centers.

Morristown's comp, Park Avenue at Morris County, is 7.1 miles to the east with about the same regional access and size in RBA. It was superior to two alternatives that were assessed. Red Bank, in eastern Monmouth County, near the shore, is located in an area with few suburban office parks. Comparable office space was located along Route 35 near Middletown. The half-mile circle contains almost 1 million square feet of office space, and the location has a Walk Score of 9.

Downtown Stamford was compared to the rest of its submarket, which has almost 2.5 times more RBA. On the other hand, downtown White Plains includes 91 percent of its submarket, the White Plains CBD. The East I-287 submarket was selected as the best comp of the seven alternative submarkets that were evaluated.

Philadelphia:

Princeton, New Jersey (95)	Princeton North submarket
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Three potential vibrant centers in Pennsylvania were nominated in the Philadelphia area. New Hope, with a Walk Score of 94, was the best choice, but its office market is very small. Ardmore is too small (338,000 square feet) and has a Walk Score of 85. Manayunk (83) is even smaller (233,000 square feet). Princeton, in the Northern New Jersey office market, originally was identified as a potential vibrant center in the New York area. In fact, it is 45 miles from Philadelphia and 51 miles from New York City. Therefore, it was considered to be a vibrant established town center in suburban Philadelphia. Princeton's town center was compared to the remainder of its submarket.

South Florida:

CityPlace, West Palm Beach (91)	Centrepark (46)
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Office properties in Centrepark just west of I-95 below Clear Lake are relatively close to CityPlace, which is to the northeast. Although smaller than CityPlace, Centrepark is the best comp, given the alternatives.

Washington, D.C.:

Ballston, Arlington, Virginia (95)	Tysons Corner (submarket)
Frederick, Maryland (94)	Frederick (submarket)
Old Town Alexandria, Virginia (100)	I-395 Corridor (submarket)
Reston Town Center, Virginia (83)	Reston (submarket)
Shirlington, Virginia (86)	Park Center (66)
Silver Spring, Maryland (94)	Greenbelt, North Silver Spring/Rt. 29 and Kensington/Wheaton (submarket)

Washington, the third-largest office market after New York and LA, offered both challenges and opportunities in selecting vibrant centers and their comps. Chris Leinberger has found Washington to be the most walkable metro in the country and, with the Metrorail system, many vibrant centers could be identified in the region. Washington also has numerous highway-oriented office properties, which creates the opportunity to compare excellent examples of vibrant centers to low-density suburban office parks and corridors.

In this market, 16 potential vibrant centers were identified. Five (Clarendon, Court House, Crystal City and Rosslyn in Virginia and Friendship Heights, which straddles the District of Columbia/Maryland border) are too close to downtown Washington, D.C., to be treated as suburban. Ballston is far enough out on the Orange Line to qualify. Carlyle, which is adjacent to the King Street Metro stop in Alexandria, qualifies, but Old Town Alexandria is a stronger center in the same part of the market. Downtown Silver Spring and Bethesda are quite comparable; both are transit oriented and have the same Walk Score. Silver Spring is the better choice because it is less “unique” than Bethesda, which has a large concentration of National Institutes of Health (NIH) facilities.

Downtown Frederick qualifies with 1.6 million square feet of office space and a Walk Score of 94. Fairfax Corner in Virginia and Rockville and Washingtonian Center in Maryland have relatively low Walk Scores. Shirlington is a good example of new urbanist redevelopment and has a reasonable Walk Score of 86. Reston Town Center is included because of the prominence of Reston as a suburban-style new town that added a town center in the 1990s. Washington has more vibrant centers in the third analysis (six) than any other metro area.

Since five of these vibrant centers are established town centers, they should be compared to their surrounding area. However, that approach only made sense for the more suburban centers of Frederick and Reston. Two problems arose with the other three town centers. First, the amount of square footage in the core area of Ballston and Silver Spring accounted for almost all of the office space in each submarket. (Old Town Alexandria’s core is 40 percent of its submarket.) The more serious problem is that areas adjacent to these three centers are more urban than suburban. To solve this problem, suburban auto-dependent office areas were paired with these three town centers.

The I-395 corridor submarket is the comp selected for Old Town Alexandria. This submarket is an excellent example of a traditional, single-use suburban office location and is in the same submarket cluster as Old Town. Silver Spring is compared to three additional submarkets to the northeast: Greenbelt, Kensington/Wheaton, and North Silver Spring/Route 29. Most office space in these submarkets is low density, auto dependent and highway oriented. Ballston is compared to the Tysons Corner submarket, which features over 26 million square feet of office space as well as the best known and largest suburban shopping mall in the D.C. area, Tysons Corner Center. Shirlington was compared to a nearby office park, Park Center. Both Shirlington and Park Center are within the I-395 submarket.

Second-tier Markets

The 35 vibrant centers in this tier were identified for the comparison to suburban areas and CBDs in the analysis described in Appendix F. Italics indicate the 11 vibrant centers that were selected for the analysis comparing suburban vibrant centers to suburban office parks. Each of those center's names is followed by its Walk Score (in parentheses) and its suburban comp. In some cases, a Walk Score is provided for the comp as well.

Baltimore:

Fells Point

Towson Town Center (95)

Hunt Valley Business Park (63)

Four suburban office clusters in the vicinity of Towson were evaluated; none was large enough to serve as a comp nor in an established office park. Hunt Valley Business Park in the I-83 corridor is sufficiently large, in a suburban area north of Towson and outside the I-695 beltway.

Charlotte, North Carolina:

Baxter, South Carolina, central area

Light-rail polygon from Uptown to Atherton Mills

SouthPark (77)

Ballantyne Corporate Park (63)

Ballantyne is a large suburban office park in the Highway 51 submarket southwest of center-city Charlotte near I-495 and west of SouthPark. The half-mile circle encompasses 2 million square feet, about the same amount of office space as SouthPark.

Cleveland:

Shaker Heights area

Denver:

Belmar (78)

West Point (40)

Downtown Boulder (91)

Boulder (submarket)

West Point, which is in Lakewood, Colorado, due south of Belmar, was a far better comparison than the five other potential comps. It had the lowest Walk Score and over twice as much office space as Belmar. Downtown Boulder was compared to the remainder of the Boulder submarket in which it is located.

Detroit:

Downtown Ann Arbor

Downtown Birmingham (95)

Birmingham area and Bloomfield (submarkets)

Since the established town center is more than half of the Birmingham area submarket, the adjacent Bloomfield submarket was added to the comp for downtown Birmingham. Both are in the Bloomfield cluster, which includes four submarkets.

Kansas City, Kansas and Missouri:

College Boulevard

Country Club Plaza (86)

Sprint World Headquarters (52)

Crown Center

Numerous candidate comps for Country Club Plaza were examined along major corridors in the area south of Country Club Plaza, which is in Kansas City's Midtown submarket. The Sprint World Headquarters was selected because it has a low Walk Score, typical suburban office construction and more RBA than Country Club Plaza. It is in the College Boulevard submarket.

Miami:

Dadeland Mall

Mizner Park (91)

Boca Corporate Center (48)

Four potential comps were situated in the West and North Boca Raton submarkets. Mizner Park is close to the Atlantic Ocean in the East Boca submarket. The selected comp is located in the North Boca submarket and has 3 million square feet of office space.

Minneapolis/St. Paul:

St. Louis Park

University Avenue, St. Paul

Orlando, Florida:

Baldwin Park

Winter Park (91)

Winter Park (submarket)

Winter Park's town center was compared to the rest of its submarket.

Phoenix:

Camelback Road

Scottsdale

Tempe

Pittsburgh:

Bakery Square

SouthSide Works

Sacramento, California:

Midtown and Zinfandel Boulevard along the Sacramento Regional Transit corridor

San Diego:

Chula Vista

Uptown Hillcrest

Westfield UTC (86)

Mira Mesa Boulevard (62)

Westfield UTC is part of the North San Diego cluster and within the UTC submarket. It was compared to typical auto-oriented office properties just off Mira Mesa Boulevard. The statistics for this half-mile circle were similar to those for the entire Sorrento Mesa submarket.

Seattle:

Factoria

Redmond (94)

University District

Redmond (submarket)

Redmond's town center was compared to the remainder of its submarket.

St. Louis:*Clayton (92)*

Edwardsville, Illinois

Creve Coeur/Hwy 67, I-270/Maryland Heights, I-270/Olive Boulevard

Downtown Clayton accounts for about 80 percent of the Clayton submarket. The best alternative was to combine three submarkets in its cluster that are in more suburban locations.

Tampa, Florida:

North Hyde Park

Third-tier Markets

The 29 vibrant centers in the third tier were compared to suburban areas and CBDs in the analysis presented in Appendix F. Italics indicate the three included in the second analysis comparing suburban vibrant centers to suburban office parks. Each of those center's names is followed by its Walk Score (in parentheses) and its suburban comp. In some cases, a Walk Score is provided for the comp as well.

Albuquerque, New Mexico:

Nob Hill near the University of New Mexico

Uptown at Louisiana Boulevard

Austin, Texas:*Mueller Redevelopment (77)*

The Domain

Highway 290 E (66)

The Mueller Redevelopment is north of the central area of Austin in the East submarket just east of I-35. The comp is north of Mueller centered on Hwy 290 E, and is also on the east side of I-35.

Birmingham, Alabama:

Homewood

Cincinnati/Dayton:

Covington, Kentucky

Glendale, Ohio

Columbus, Ohio:

Dublin

Grandview Avenue

Short North

Greensboro/Winston-Salem, North Carolina:

Friendly Center

Hartford, Connecticut:

Blue Back Square (95)

Salmon Brook Office Park (63)

Salmon Brook Office Park is south of Hartford in Glastonbury, Connecticut. It is not close to Blue Back Square in West Hartford but represents one of the few examples of a recently developed suburban office park in the region.

Indianapolis:

Carmel

Jacksonville, Florida:

San Marcos neighborhood

Las Vegas:

Hughes Center

Milwaukee/Madison:

Third Ward area

Madison central area

Nashville, Tennessee:

Hillsboro Village (89)

Burton Hills (51)

Burton Hills was selected as the best comp, based on advice from Nashville Chamber of Commerce staff. The area is southwest of I-440, farther out from the interstate than Hillsboro Village on the west side. Alternative comps had higher Walk Scores.

Portland, Oregon:

Beaverton and Gresham, near transit

Raleigh/Durham, North Carolina:

Cameron Village

North Hills

54 East and Meadowmont

Rochester, New York:

Combined villages of Brockport, Fairport and Pittsford

Salt Lake City:

Gateway Center

Sandy core

Sugarhouse area

Tulsa, Oklahoma:

Forest Orchard and Swan Lake neighborhoods