

Planners Advisory Committee (PAC) Self-Storage Subcommittee Findings



Introduction

A resurgence of people wanting to live in thriving downtowns has created a demand for space in urban areas, housing shortages, and increased rents and mortgages. Therein lies the conflict, more upwardly mobile workers are living in more constrained urban areas, signifying to the market there is a need for storage space close to urban downtowns. Urban planners must grapple with potential land use conflicts between parties when determining the highest and best use for urban areas.

Recently, Forward Pinellas hosted a series of Self-Storage Subcommittee meetings to explore the topic and to provide guidance for local governments. Representatives from Pinellas County, Clearwater, Largo, St. Petersburg, Tarpon Springs, Pinellas County Economic Development and BRB Development met to discuss trends, design, regulations, compatibility with neighboring properties, and best practices.

Demand

Where space is at a premium, people look for cost effective and convenient living solutions. Further, when downsizing people seek self-storage to store excess belongings, or things they only use on occasion, like sports equipment. Self-storage developed to meet these needs, and has grown as more people experience the crunch of city-living, or unexpected life changes like childbirth or death. Self-storage proves to be an attractive investment, too, because of its income-generating potential for investors and relative ease of property management.

Nationally, areas that experience a large increase in population and job growth, see a positive correlation of more self-storage units available. According to Pinellas County Economic Development, Pinellas County adds about 41 people per day to its population, this number being net change of people coming and going. Further, population turnover here is particularly high, and over a five year period about one third of the County's population turns over to new residents. Demographic and generational trends, like low unemployment, and more disposable and discretionary income means people are more likely now to rent self-storage. Other significant factors contributing to an increase in self-storage are the mobile nature of today's worker. Young adults move frequently. Popular opinion in many news articles would describe the millennial zeitgeist as choosing one's preferential city to live in before landing a job there, and wanting to be in close proximity to the city center, even if that means a smaller space.

Self-Storage Best Practices



Active Use

Maintain an active ground-level street front that contributes significantly to the local economy, provides services to the community, and limits uses that are passive, like parking and self-storage, to upper floors.



Neighborhood

The design should fit in with the surrounding neighborhood characteristics and match its character, style, and aesthetic look.



Location

The best locations in Pinellas County for self-storage are along major arterial roadways in commercial areas.



Access

The loading or unloading of vehicles, vans, trucks or trailers should not obstruct pedestrians, cyclist, or vehicular traffic.



Noise

Attenuate noise produced from loading and unloading self-storage units.



Lighting

Direct lighting away from residential neighborhoods preventing creep, while also using as a deterrent for crime.



Trends and Challenges

When land was more affordable in Pinellas County, self-storage was typically single-story on larger plots of land. Mini storages contain household goods and equipment, are traditionally automobile-oriented, with many developments having numerous external bay style doors accessing separate storage garages or spaces. As land becomes more at a premium, self-storage developments have become more vertically oriented with multiple stories, closer to or in established neighborhoods and activity centers.

There are downsides to this land use type; Self-storage isn't really appropriate in downtowns because it takes up a lot of valuable space, and its use is limited. Self-storage serves the surrounding business community, and residents who need offsite storage, but the use does not provide many jobs, and generates little revenue for the local economy as compared to other commercial uses, like restaurant or retail uses. Similarly, self-storage is not a desirable use in areas with high economic output, like industrial land. In Pinellas County, our most economically productive uses occur on industrial land, like high-tech manufacturing. Aesthetically, self-storage creates enormous areas that are barely used, which do not add to a livable street continuity, or economic activity. For these reasons, city leaders, planners, and local governments are encouraged to determine the best place and regulations for this specific use.

The self-storage market is currently developing at a rate much higher than in years past. Real estate investment trusts (REITS), which commonly own and operate self-storage facilities and pass along profits to investors, are becoming a major factor in new projects and buildings. Currently, markets in the American South and West are very favorable for self-storage, because net migration and job growth are high in places like Tampa Bay, Orlando, Atlanta and Houston. However, there are signs that the self-storage market is slowing down nationally, that we are approaching market-saturation, and that we are approaching the tail-end of a cycle.

In Tampa Bay, developers indicate that the market is underserved and there is a need in the area for more self-storage, which is calculated based off of current square footage available per resident. According to Pinellas County Economic Development (PCED), the Pinellas County market does have potential to support more self-storage units; it is under the national average for the number of units and square footage per person, and has higher rents because of lower supply. Pinellas County has about 5.4 square feet of self-storage per person, or only 77% of the national average of about 7 square feet. Therefore, the local market still has room to grow. Local developers are looking for creative ways to build self-storage in Pinellas County, and say that the local market is challenging because of high land values, and the lack of available real-estate that can accommodate self-storage.

Local governments have to balance economic, aesthetic, and social factors to come up with a "best use" for redeveloping neighborhoods. Planners around the County are trying to incorporate

self-storage in appropriately zoned areas, where it can support more of a mixed and active use; i.e., a mix of commercial, office, and residential. For example, requiring ground floor commercial retail, office or residential around the liner of self-storage supports urban design principles that ensure greater economic activity and pedestrian accessibility.

Planned unit developments (PUD), which includes a flexible regulatory agreement between the developer and local government, are also effective mechanisms to guide and control development that includes a varied mix of land uses so that no single use dominates the nature of a neighborhood, and can dictate that self-storage may be a portion of an overall development.

Self-storage often encroaches upon industrial and commercial zones in Pinellas, which poses a threat to the most economically productive areas in the County. Both PCED and Forward Pinellas support preserving industrial areas as a countywide strategy because they are Pinellas County's biggest employment and income generating use. However, self-storage ideally should not locate in traditionally industrial areas or in close proximity to job retaining industries. Further, local governments would like to see more of an employment element considered when approaching new and existing self-storage uses. Pinellas County Economic Development would like to see self-storage locate in commercial areas that incorporate a more active and mixed-use, or office use, and which does not encroach on industrial lands.

Developers have indicated that mixed-use self-storage is not typically done because of difficulties with financing and property management. Finding partners who develop and manage residential and commercial along with self-storage properties is difficult to do. Coordination between policy makers, local governments, and developers is essential to maintaining a vibrant, economically diverse cityscape that can support self-storage.

Ultimately, local governments know where self-storage best fits and suits the needs of the community, and have discretion on where they are allowed. Forward Pinellas supports self-storage incorporating more of an active storefront presence and a mix of uses, and please refer to our best practices for site design recommendations.

Regulatory Considerations

In the Countywide Rules, self-storage is an acceptable use and referred to as Mini-warehouse Storage, which is considered to be a subset of Storage/Warehouse – Light. The Countywide rules allow for Storage/Warehouse – Light in the categories: Retail and Services, Employment, Industrial, and Public/ Semi Public. Under the Countywide Rules, self-storage is not advised in the Activity Center or Multimodal Corridor categories, which are designed to create areas of intensive residential density, nonresidential intensity, and mixed uses in conjunction with urban design that allows and encourages multimodal transportation, including pedestrian/bicycle circulation and transit use. Inconsistent uses include automobile-oriented uses such as drive-

through facilities, “big-box” retail uses, gas stations, vehicle repair shops, vehicle sales, car washes, and large buildings with low levels of activity such as self-storage. Self-storage uses are not ideal in these areas because they are an auto-oriented use that consumes large amounts of floor area, has few employees, and does not incorporate active storefront uses.

Countywide Rules Definitions

Mini-warehouse Storage – An enclosed, indoor facility containing individual compartmentalized storage units for the inside storage of customers’ goods or wares. Mini-warehouse Storage uses are considered to be a subset of Storage/Warehouse - Light, as specifically defined within these Countywide Rules.

Storage/Warehouse - Light – A use devoted primarily to the storage of goods, materials or equipment. Such use shall be located within an enclosed building and any exterior storage shall be incidental to and not exceed twenty (20) percent of the area of the building to which it is accessory.

Strategies from Around the Country

Maintaining traditional neighborhood characteristics is an integral part of planning, and for this reason local governments/cities can choose to limit or restrict the impacts that self-storage has on its communities. Some local governments may want to shelter residents from the effects of a self-storage use and require buffers from residential neighborhoods. Charleston, South Carolina, for example, prohibits self-storage within 200 feet of residential and mixed-use zoning districts.

When self-storage units have become either too pervasive or out of character for a neighborhood, an outright ban might be appropriate. Collier County, FL approved a one-year ban on self-storage uses along a seven-mile stretch of U.S. Highway 41, and Margate, FL no longer permits new self-storage uses within municipal limits.

The City of St. Petersburg currently has in its local code of ordinances, stipulations that storage facilities may not occupy more than 25 percent of a development in the downtown core, or 49 percent part of a permitted accessory use in other parts of the city. (Please see below for the City of St. Petersburg’s full section on self-storage).

REGULATION BASED ON DISTANCE

MIAMI, FL

- REQUIRES A DISTANCE OF 2,500 FEET BETWEEN SELF-STORAGE USES IN COMMERCIAL AND INDUSTRIAL ZONING DISTRICTS

CHARLESTON, SC

- PROHIBITS SELF-STORAGE WITHIN 200 FEET OF RESIDENTIAL AND MIXED-USE ZONING DISTRICTS

ACTIVE GROUND FLOOR REQUIREMENT

CHARLOTTE, NC

- ALLOWS SELF-STORAGE IN MIXED-USE URBAN AREAS IF DESIGN CRITERIA ARE MET, AND GROUND FLOOR BUILDING FACADES THAT FRONT A PUBLIC STREET ARE WRAPPED WITH RETAIL OR OFFICE USES

PORTLAND, OR

- REQUIRES 50% OF THE GROUND-LEVEL FLOOR AREA TO CONTAIN ACTIVE USES, SUCH AS RETAIL, OFFICE OR INDUSTRIAL, WHEN LOCATED WITHIN 500 FEET OF A TRANSIT STATION OR 100 FEET OF A NEIGHBORHOOD CORRIDOR, CIVIC CORRIDOR OR STREETCAR LINE

PROHIBITION

CHARLESTON, SC

- PROHIBITS SELF-STORAGE IN ITS URBAN COMMERCIAL ZONING DISTRICT

NEW YORK, NY

- PROHIBITS SELF-STORAGE USES IN SOME INDUSTRIAL ZONING DISTRICTS TO PROTECT JOB-INTENSIVE BUSINESSES AND INDUSTRY

MORATORIA/ BANS

COLLIER COUNTY, FL

- APPROVED A ONE-YEAR BAN ON SELF-STORAGE USES ALONG A SEVEN-MILE STRETCH OF U.S. HIGHWAY 41

MARGATE, FL

- NO LONGER PERMITS NEW SELF-STORAGE USES WITHIN MUNICIPAL LIMITS

Example Language from St. Petersburg Regulating Self-Storage:

SECTION 16.50.400. - STORAGE, SELF

Sections:

16.50.400.1. - Applicability.

This section shall apply to self-storage uses.

(Code 1992, § 16.50.400.1; Ord. No. 202-H, § 2, 11-23-2015)

16.50.400.2. - Purpose and intent.

Self-storage uses will be necessary to serve the needs of a growing population. During the latter portion of the 20th century, self-storage uses were typically constructed as a series of one-story buildings with exterior access to individual spaces via overhead doors. In built-out, urban cities such as St. Petersburg, higher land values typically encourage more efficient uses of land, which has led to adaptations in how self-storage opportunities are provided. These adaptations have included incorporation into multi-story and vertical mixed-use developments. This section is intended to establish standards for these uses to ensure that development occurs in a manner that is consistent with and appropriate for an urban environment.

(Code 1992, § 16.50.400.2; Ord. No. 202-H, § 2, 11-23-2015)

16.50.400.3. - Establishment.

The establishment, expansion, or redevelopment of storage, self uses shall be allowed as provided in the Matrix: Use Permissions and Parking Requirements and shall comply with the development standards of the zoning district, the general development standards, and this section.

(Code 1992, § 16.50.400.3; Ord. No. 202-H, § 2, 11-23-2015)

16.50.400.4. - Development standards.

A. Except as required otherwise by this section, the site layout and orientation and building and architectural design requirements shall comply with the standards of the applicable zoning classification.

B. Access to individual storage spaces shall be provided from within the building or from an interior courtyard enclosed by building walls on all sides. Doors accessing individual storage spaces through an interior courtyard shall not be visible from any property line. C. A building containing storage units shall include at least one principal entrance, which faces the primary street. The leasing office and other non-storage customer service areas shall be incorporated into the linear building frontage along the primary street. D. Storage spaces shall not be used as workshops or other active uses. E. Outdoor storage of any type, including but not limited to, moving vans, commercial vehicles, recreational vehicles, and boats shall be prohibited, except where outdoor storage is allowed by the Use Permissions and Parking

Requirements Matrix and Zoning Matrix. F. Loading Areas. For purposes of this section, the term "loading" shall include both the placement of personal products onto, or removal from, a transportation vehicle; the term "area" shall include both loading bays and loading zones. All loading areas shall be provided along the interior side or rear of the building. Required off-street parking spaces shall not be used to satisfy the requirement for a loading area. Loading areas shall meet the following minimum requirements: 1. Loading areas shall be screened from view with a solid masonry wall measuring at least six feet in height. Where the loading area is abutting, or across an alley from, any residential use or residential zoning district, the loading area shall be screened from view with a solid masonry wall measuring at least eight feet in height. The required screening wall(s) shall be architecturally finished to match the building; 2. Any loading bay visible from an adjacent residential use or residential zoning district shall have an overhead door which shall be closed at all times, except during an active loading process; 3. There shall be a minimum of one loading space for tractor trailers, meeting dimensional requirements as specified in this code. Loading spaces shall be located and arranged so that a semi-tractor trailer shall be able to gain access to and use such space by means of one continuous parking maneuver; 4. Loading with commercial vehicles shall be prohibited between the hours of 9:00 p.m. and 7:00 a.m. G. Solid waste containers. Storage of solid waste containers is encouraged to be provided within the building, where possible. Solid waste containers shall be stored and accessed along the interior side or rear of the building or required yard. The enclosure shall be setback a minimum of 20 feet from any property line abutting, or across an alley from, any residential use or residential zoning district, and shall be screened from view in accordance with this code.

(Code 1992, § 16.50.400.4; Ord. No. 893-G, § 12, 9-4-2008; Ord. No. 202-H, § 2, 11-23-2015)

16.50.400.5 - Located within a designated activity center.

A. When located within a designated activity center, identified by the City of St. Petersburg's Comprehensive Plan and shown on the future land use map, accessory self-storage uses shall not exceed 25 percent of the floor area of the allowable principal use.

(Ord. No. 256-H, § 3, 2-16-2017)