dc vibrant
retail streets toolkit

presented to:
DC OFFICE OF PLANNING

presented by:
streetsense.

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Dear Neighbor,

The District's evolving retail economy is an opportunity for the city to grow its tax base and become more fiscally sound. Retail can create new jobs, enhance neighborhood amenities, provide convenient access to goods and services for residents, generate millions of dollars in new tax revenue and reduce the phenomenon of residents leaving the city to buy what they need or want. Investments in emerging commercial corridors are bringing new retail energy to neighborhoods; however, as with retail areas across the nation, retail streets in the District face a variety of challenges. The Vibrant Retail Streets Toolkit is a guide designed to take advantage of renewed interest in urban markets by retailers as well as the District's growing population who choose our increasing number of walkable, bikeable, transit-rich neighborhoods to shop and access services in the city.

The study evaluates the essential elements of outstanding retail areas and offers a customizable toolbox of programs, incentives, and implementation steps to improve retail streets. The toolkit incorporates research on best practices and innovative approaches to managing successful commercial districts and also uses retail metrics that assess the level of retail demand and accessibility and location mix and format. The study offers guidance on key retail issues such as retailers' site location considerations and decision-making processes, as well as how neighborhoods can measure, gauge and spark retail vibrancy. The analysis and toolkit will equip retailers, landlords, business and neighborhood associations, nonprofits and government agencies with the tools needed to support more dynamic retail streets.

The District of Columbia has all the ingredients to be an extraordinary retail city; the Vibrant Retail Streets Toolkit provides the framework to help achieve this vision. I hope that it stimulates greater and more innovative collaboration among retail stakeholders to ensure our retail entrepreneurs are supported, our shoppers have a greater selection of products and services, and our retail streets thrive. I also hope that it offers guidance on how best to take advantage of assets such as walkability, sustainability and great urban form. I look forward to working with you in supporting a dynamic retail experience for our residents, workers and visitors.

Sincerely,

Harriet Tregoning
Director
DC Office of Planning

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When Washington, DC's Office of Planning issued a Request for Proposals to study the measurable components of vibrant retail streets, we were skeptical...and intrigued. In the course of preparing this document, our office -- which is dedicated to the study and practice of retail architecture, market analysis, branding, development, and mixed-use planning -- discovered connections between retailers and urban environments that we had not seen before. We are more knowledgable and curious about our field than ever.

Even the most studied and analyzed retail conditions have anomalies, however. Retailing in the United States is too innovative, creative, and irrational to follow a formula in every circumstance. This study is intended to reveal a systematic path to identifying an area's potential as a vibrant retail street and the steps necessary to make this ambition a reality. But warning -- community beware! The following issues and conditions can bend if not break the rules of retail:

- A retailer's preferred new location is next to an existing retailer that has experienced proven success.

- Extremely high residential density, income, or workforce population can intrigue a retailer enough to overlook other shortcomings.

- A retail district adjacent to a regional retail draw -- a collection of big box stores, a popular boutique area, or a row of restaurants -- may require a different approach. Going head-to-head with existing retail competition, even substandard ones, is an uphill battle. Try to identify a need in your local market that's not currently being filled.

Finally, please note: while the methodology created for this report may have broad application, the information, tables, and data included in this report were generated specifically for Washington, DC. The diagnostic tests, retailer site-selection charts, and modeled retail streets will not translate directly to other municipalities.

Thank you for your interest in our work on behalf of the Washington, DC Office of Planning. We encourage you to explore www.vibrantstreets.com for additional information.

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introduction 6
executive summary 7
evolution of retail streets 8

what makes a vibrant retail street? 10
selecting model vibrant streets 11
evaluating model vibrant streets 12
the building blocks of a vibrant street 18
attributes of a vibrant street 22

how can we reinforce these attributes to create vibrant streets? 23
innovative approaches & best practices 25

what are retailers looking for? 33
key criteria 35
decision making diagrams 40

vibrant retail streets diagnostic assessment 47

vibrant retail streets implementation toolkit 55

technical appendix 73

bibliography 79

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Washington, DC is an extraordinary and ever-changing place. In addition to its reputation as a world-class city, the Nation's Capital, and a major center of employment, DC continues to flourish as a highly desirable place to live. From historic neighborhoods to the growing Center City area, there is something for everyone.

Many of DC's residential areas are supported by retail districts that offer basic goods and services, a variety of restaurants, charming sidewalks, and shade trees. Think Dupont Circle, Barracks Row, and Georgetown. However, even these neighborhoods struggle with retail issues of their own.

Retail streets face a wide variety of challenges. Some historic retail streets are no longer supported by the infrastructure or neighborhood conditions that brought them about in the first place. Other business districts have not evolved to address changes in population. Several small retail areas are experiencing or are about to experience direct competition from national chain stores entering DC's submarkets for the first time. Still other neighborhoods are experiencing the local frustrations that can go along with regional success -- trying to balance residential life amidst a bustling collection of restaurants and bars.

This study was commissioned to offer a customizable set of tools to aid each DC neighborhood's retail environment. The ultimate goal of this toolbox of programs, incentives, planning approaches, and implementation steps is to help every retail street in the District of Columbia become a vibrant one. Before prescribing medicine, however, this document pursues a thorough diagnostic evaluation of DC's retail market, a comparative analysis to other vibrant retail streets, and an examination of how various types of retail operations make site-selection decisions. What factors ultimately determine their success or failure?

This document offers direction and next steps for DC retail streets that have not yet reached their full potential as well as those that are struggling after a period of stability. It is intended to provide a set of tools that can be used by retailers, business and merchants' associations, government agencies, as well as neighborhood and community associations to address and resolve the issues that are affecting retail districts.

Presented first is an overview of how DC's retail streets began and why a one-size-fits-all solution doesn't apply.

Next comes a study of model retail streets, to determine what common elements define the truly vibrant ones. What best practices can be learned from the communities in which these noteworthy places are found? How do these examples demonstrate how DC's private, public, and non-profit sectors could further aid retailers and, more specifically, enhance retail streets?

A metrics analysis of retail site selection follows the best practices. When searching for new locations, what are enterpreuneurs and restauranteurs seeking out? These selection criteria are then illustrated through a series of decision-making trees. The purpose of these diagrams is to demonstrate how a variety of conditions might lead a retailer to sign a lease or pass on a site.

Finally, what are the significant issues that keep existing retail streets from meeting their full potential? Addressing and overcoming these obstacles are the goals of the Implementation Toolkit.

The future vibrancy of DC's retail streets will be based on three issues. First, comprehending the elements that enable retail environments to be vibrant. Second, giving neighborhoods, organizations and retailers the necessary tools to evaluate their district's retail compatibility. Third, linking programs, incentives, and planning initiatives to enhance DC's retail streets.

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During the earliest years of the Industrial Revolution, lively retail streets were easy to find. An active crossroads, mail drop-off, turnpike toll, or railroad station provided the necessary ingredients for a bustling general store.

Retail development patterns changed by the last decades of the 19th century but still focused on active transportation hubs. Ports and streetcar stops -- especially turnarounds -- joined the list of places that could support retail environments. Georgetown and Barracks Row emerged as two of the first active commercial areas in DC.

After the turn of the 20th century, the emergence of large-scale department stores changed the rules. These retailers chose sites in or close to wealthy urban neighborhoods: Georgetown (DC), Rittenhouse Square (Philadelphia), Beacon Hill (Boston), Nob Hill (San Francisco), the Gold Coast (Chicago). Small retailers clustered around these anchors.

The first half of the 1900s dealt a rapid succession of blows to retail streets across America. The introduction of mass-produced cars, the reduction in consumer goods spending during the two World Wars, the GI Bill-fueled explosion of the suburbs, all culminating with the Federal-Aid Highway Act in 1956, left many urban retail neighborhoods stumbling, including DC's downtown.

The integration of school systems, the riots that followed Dr. Martin Luther King Jr.'s assassination, and urban renewal practices of the 1960s deepened the trauma to downtowns across the United States. Within DC, H Street NE and U Street continued to bear the scars of the unrest until their recent resurgences four decades later.

Suburban shopping environments came to be seen as enclaves of safety and convenience. Urban retail was considered neither safe nor convenient to the nation's middle and upper classes.

For cities, the picture brightened in the 1970s. The National Historic Preservation Act of 1966 and subsequent tax-related legislation stalled or prevented the demolition of many retail streets. The Oil Embargo of 1973 made the suburban commuter lifestyle much less affordable and urban transit systems much more popular. Cities became more appealing, and the real estate community responded by building a record number of urban residences between 1980 and 2000. As people returned, urban retail followed. The benefits of this trend within DC could be found in Penn Quarter/Gallery Place, Pennsylvania Avenue SE, and Friendship Heights.

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Since the close of the 20th century, retail markets have been shaped by specific statistical thresholds determined by national retailers and adopted by smaller merchants as well. Stores expanded rapidly during the late 1990s and early 2000s, as densely populated neighborhoods with high incomes were targeted for new locations. Local commercial brokers provided the groundwork: Were these areas safe and well-maintained? Did the sales volumes of existing stores and restaurants demonstrate a high level of demand? Were sites visible and accessible?

Now, with signs of recovery rippling through retail markets, there are early indications that the standards for site selection are changing. The fundamentals -- population, visibility, access -- remain important, but retailers have modified their requirements. Instead of applying suburban store standards to urban locations, entrepreneurs are creating criteria for urban locations that acknowledge the differences in lifestyles between the two customer types.

One is proximity to mass transit options. More retailers are requesting subway and bus ridership figures. National chains, less fearful about "cannibalizing" sales at their locations, are willing to place new stores closer to existing ones. Also significant is an emphasis on "sense of place'' -- the environment, or the feel, of a particular neighborhood. A retailer may ask: Does this location, its design, its other tenants, reinforce our brand and overall concept? What do I need to change in my approach to inventory and business hours, given that my customers are likely to shop frequently and perhaps later into the evening? More importantly, will opening a location in this neighborhood result in sales and positive exposure?

Washington, DC was established and built on government and politics, not business and commerce. Consequently, the most central, accessible, and prominent feature of L'Enfant's plan for the District was not "Main and Main," but the National Mall. DC has struggled to create its retail destination district in part because the core of the city is occupied by the Smithsonian and Federal government. Instead of emerging from historical context and traditional shopping patterns, DC's downtown area is in the process of being catalyzed by residential development, sports and entertainment venues, and cultural facilities in the city's East End -- more than 300 years after L'Enfant's original design.

Even before the financial crisis that started in 2007, retail markets had stumbled; practically all of the "ideal" neighborhoods in the United States had the full spectrum of desired national stores and places to eat. The savvy local and regional retailers who could generate sufficient sales to afford the rents in these areas were already there. When consumer confidence and spending plummeted, retailers not only halted expansion plans, they announced store closings in numbers never before seen.

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what makes a vibrant retail street?

metrics assessments of memorable shopping streets

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Vibrant retail streets come in different sizes, have different purposes, and appeal to different customers. For this analysis, data was collected and evaluated for 16 viable, cherished, and vibrant retail streets from within the United States, plus two representative international examples. The objective of this research was to discover common elements among the world's great shopping streets. These similarities could form the basic planning principles for nurturing new retail streets within the District.

Two distinct types of environments were evaluated: small-scale neighborhood streets and destination retail streets. The places selected for study were chosen because they can inform discussion on particular issues facing DC's retail environments. These topics include:

- What form, format, and type of retail mix would result in a remarkable downtown shopping and dining cluster?
- What essential ingredients might be critical in fostering and furthering neighborhood-oriented retail outside of the downtown core?
- How does the District balance the needs and expectations of its residents with the operational requirements and unintended consequences of restaurant uses?
- How can the District's retailers and retail environments continue to evolve as their customers change?
- Can diverse groups of landowners work together to create a vibrant retail street, or is vibrancy achieved only with a single owner?
- What roles do parking, transit, and walkability play in supporting neighborhood shops and restaurants?

Every vibrant retail street discussed on the following pages has a unique quality that is created by people making their marks on their own neighborhood street, and in doing so, make it authentic, representative and vibrant.

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For this analysis, the following examples of small-scale shopping streets were studied:

- Carytown, Richmond, VA
- North Market Street, Frederick, MD
- Main Street, Manayunk, PA
- Charles Street, Boston, MA
- Oak Street, Chicago, IL
- Madison Park, Seattle, WA
- Bethesda Row, Bethesda, MD
- East Davis Street, Culpeper, VA
- O'Donnell Square, Baltimore, MD
- Atlantic Avenue, Brooklyn, NY

carytown

Richmond, VA

Richard McDonald, New Media Systems

The core trade area around this eight-block retail street has modest population density and income. Still, Carytown is considered one of the most eclectic, exciting and enviable areas in the Mid-Atlantic. With a balanced mix of retail categories, the street's stores and restaurants are supported by a national chain grocery store (Kroger's) and a local organic market (Ellwood Thompson's).

Despite all the positive attributes, Carytown has struggled significantly due to the economic downturn. Like many retail submarkets in DC, this vibrant retail street seems always to be walking a narrow line between prosperity and want...yet, its vibrancy remains constant.

Corresponding DC Retail Environments:
Cleveland Park, P Street/14th Street Corridor, Adams Morgan

north market street

Frederick, MD

Courtesy of Downtown Frederick Partnership

Long ignored as regional retail development was concentrated in highway strips and malls, downtown Frederick was rediscovered by innovative restaurateurs and entrepreneurs in the midst of the national economic crisis. North Market Street became an enclave for retailers that wanted to appeal to big-city customers, but could not maintain the rents, sales prices or operational costs in Baltimore or DC.

North Market Street has flourished as a retail district in spite of -- or, perhaps, because of -- its historic architecture and associated protections. As a vibrant retail street, North Market Street can serve as a reminder of the importance of timing and serendipity.

Corresponding DC Retail Environments:
East End, Georgia Avenue Petworth

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main street

Manayunk, PA

Courtesy of Manayunk Development Corp.

In the shadow of Philadelphia, one of the country's oldest and most historic downtowns, Manayunk's Main Street combines classic charm and urban sensibilities. Positioned along the Schuylkill River, with access to multiple bike trails and mass transit, Manayunk is home to some of the area's most interesting restaurants and local retail brands, along with a collection of national retailers including Pottery Barn, Banana Republic and Restoration Hardware. Although recent exits have changed the tenant mix, occupancy and rental rates are slightly above national averages.

Corresponding DC Retail Environments:
Brookland

charles street

Boston, MA

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As the commercial backbone of Boston's Beacon Hill, Charles Street has a long history of serving upscale urban residences. The city's infrastructure and accessibility choices over the years, including a subway stop at its northern end and a massive underground parking structure at its southern end, have allowed continued prosperity along this corridor. Today, stately Beacon Hill mansions are much more likely to be occupied by multiple renters rather than by one affluent family. However, Charles Street remains their primary location for shopping and dining. Retail sites along this street are aggressively sought and rarely available.

Corresponding DC Retail Environments:
Georgetown

oak street

Chicago, IL

Chaya Babu

Running perpendicular to the northern boundary of Chicago's North Michigan Avenue, Oak Street is an outstanding example of a niche retail street with inconsistent vibrancy. Anchored by Barneys New York, Oak Street also boasts a Vera Wang Bridal Boutique, Jimmy Choo, Hermes, Yves Saint Laurent, and Prada. During the past several years, the street has endured double-digit vacancy rates and recently welcomed mainstream retailers, including White House/ Black Market.

Oak Street may have valuable lessons for DC as it considers niche market merchandising strategies for neighborhood retail streets.

Corresponding DC Retail Environments:
Areas under consideration for niche retail market strategies

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madison park

Seattle, WA

Bryan Tagas, www.madisonparkblogger.com

Madison Park's commercial district extends along Madison Street and terminates at Puget Sound. Although these four blocks are home to several of Seattle's best restaurants, this retail street primarily serves the Madison Park neighborhood, both functionally and symbolically.

In Seattle, retail districts are distributed throughout the Central Business District and the neighborhoods. Madison Park is an example of a neighborhood retail street at its best.

Corresponding DC Retail Environments:
Mount Pleasant, Kennedy Street NW

bethesda row

Bethesda, MD

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Unlike streets that are built on history, Bethesda Row is writing its own. Construction of this six-block area began in the mid-1990s, and the development of adjacent parcels continues today. Bethesda Row's initial allure was greatest for restaurateurs, who occupied a large majority of the retail space in Phase I. Fifteen years later, this district has proven itself beyond the Food & Beverage category and now includes tenants such as Apple, City Sports, Paper Source, and Bluemercury spa.

Some vibrant retail streets begin as restaurant rows and become something more through the ability of a superb collection of dining establishments to attract a wider customer base.

Corresponding DC Retail Environments:
Pennsylvania Avenue SE, Capitol Riverfront

east davis street

Culpeper, VA

Melissa Vesuna, Culpeper Renaissance Inc.

The story of downtown Culpeper's resurgence can be told in three parts: 1) an historic downtown remains dormant for decades; 2) the community nominates East Davis Street for Virginia Main Street designation; 3) Culpeper Renaissance Inc. is formed to administer the program and serve as a single-minded information clearinghouse and enthusiastic marketer for the street's tenants, landowners, and brokers.

Culpeper's downtown area is owned by approximately 30 different individuals and corporations. The ability of one organization to represent East Davis Street with one united vision helped this isolated, rural community capture unmet retail demand in Central Virginia.

Corresponding DC Retail Environments:
Minnesota-Benning, Anacostia

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o'donnell square

Baltimore, MD

About.com Baltimore

A community park for the Canton neighborhood, O'Donnell Square is best known for the collection of bars and restaurants that surround it. The noxious activities typically associated with Food & Beverage clusters -- trash, vermin, public urination, late-night noise -- affect adjacent residents and have caused community tensions. Although O'Donnell Square's businesses lack a merchants' association or non-profit organization, the retailers and residents have developed a working relationship through the Canton Community Association that allows them to peacefully co-exist. The residents' sense of ownership in the success of the O'Donnell Square businesses is aided by the presence of several civic and cultural buildings on the square, including an historic fire station, a church and a community library, as well as the square itself.

Corresponding DC Retail Environments:
Pennsylvania Avenue SE, Adams Morgan, Barracks Row

atlantic avenue

Brooklyn, NY

Karen Zebulon

A great retail street that has undergone numerous transformations, Atlantic Avenue in Brooklyn is a cluster of restaurants and cafes that are interspersed with neighborhood goods, services, boutiques, and quite a few ground-level, professional offices. Despite frequent disruptions of its retail continuity, this street still reads as a comprehensive and vibrant one. This liveliness is created, in part, because of the authenticity that characterizes Atlantic Avenue. Fine restaurants combine effortlessly with an animal hospital, upscale toy store, and a horse bridle purveyor, as they have for over a century. With the large-scale Atlantic Yards/Barclay Center (sports arena, retail, residential) project under construction at the street's western edge, Atlantic Avenue is poised for reinvention once again.

Corresponding DC Retail Environments:
Downtown-Penn Quarter,
Convention Center-Shaw, Tenleytown

For this analysis, the following examples of destination retail streets were studied:

- Walnut Street, Philadelphia, PA
- Newbury Street, Boston, MA
- North Michigan Avenue, Chicago, IL
- Third Street Promenade, Santa Monica, CA
- Champs-Elysees, Paris, France
- Ometosando Dori, Tokyo, Japan

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walnut street

Philadelphia, PA

Peter Tobia for the Center City District

Walnut Street has long been home to Philadelphia's specialty and luxury brands including Cole Haan, Polo Ralph Lauren, Apple and Anthropologie. The street is characterized by its relatively low scale, with most buildings not exceeding three stories, along with its one-way direction (with two lanes) and limited on-street parking. Walnut Street also includes a number of world-class restaurants and hotel offerings within close proximity.

Corresponding DC Retail Environments:
Former Convention Center Site,
Georgetown, F Street

newbury street

Boston, MA

Jackie Hassin

In stark contrast to the large-scale, discount-oriented urban shopping center at Boston's Downtown Crossing, Newbury Street has long been associated with upscale, boutique retail, with a mix of eateries and stores. The street's historic architecture creates an environment that serves as an untraditional anchor for its retailers. The unusual configuration of below-grade and walk-up boutiques generates an atmosphere of being invited into an exclusive club.

Corresponding DC Retail Environments:
Former Convention Center Site, 14th & U,
Dupont Circle

north michigan avenue

Chicago, IL

Davis Harrison Dion

Widely known as the Magnificent Mile, Chicago's North Michigan Avenue is one of America's most sought-after retail addresses. Unlike Rodeo Drive or Fifth Avenue, North Michigan has a diverse customer profile, with only a few shops or restaurants geared solely toward upper-income patrons. In a city of shopping streets, North Michigan Avenue is the undisputed champion of Chicago's vibrant retail streets.

Corresponding DC Retail Environments:
Former Convention Center Site

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third street promenade

Santa Monica, CA

Bobak Ha'Eri

Developed in the style of festival marketplaces, the Third Street Promenade is a pedestrian-only retail thoroughfare that is occupied by notable national tenants and a few distinguished local stores. The streetscape, including aqua-colored street furniture and flags suspended above the streets, creates a parade-like atmosphere, even when stores and restaurants are closed. The street is supported by a local population but thrives due to spending by tourists drawn to the Pacific Ocean beaches only two blocks away.

Corresponding DC Retail Environments:
Capitol Riverfront

champs-elysees

Paris, France

streetsense

The Champs-Elysees was created in 1640 and today hosts some of the country's most significant civic and cultural events, including the annual Bastille Day Parade and the final stage of the Tour de France. Anchored by the Arc de Triomphe, this Parisian street hosts a variety of international retailers willing to pay a premium for a Champs-Elysees location.

Corresponding DC Retail Environments:
Pennsylvania Avenue, NW, Capitol Hill, Connecticut Avenue/Golden Triangle

omotesando dori

Tokyo, Japan

Michael Vito

Large and dense, with modern architecture and technology incorporated into the streetscape design, Omotesando Dori resembles other well-known Asian shopping districts. This street extends from Toyko's famously branded Harajuku District and offers highly desirable retail spaces for international stores. The wide sidewalks are often packed with pedestrians, and vehicular traffic, although allowed, travels at a slow pace, relinquishing the right-of-way to shoppers.

Corresponding DC Retail Environments:
Columbia Heights, Gallery Place, Friendship Heights

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the building blocks of a vibrant street – table one: general observations

Examination of the metrics associated with each of these environments (see the Technical Appendix) leads to these conclusions about the relative importance of what factors support a vibrant retail street:

element	relevance	explanation
Year Established	○	The surveyed model retail streets were developed as early as 1640 (Champs Elysees) and as late as 1996 (Bethesda Row) and cover the spread in between.
Average Sidewalk Width	●	Sidewalk widths on model retail streets are appropriately sized to accommodate the amount of customer traffic generated. Sidewalks for small-scale shopping streets are as narrow as eight feet (Madison Park) but are generally 9 or 10 feet wide. Two streets that draw regional customers and tenants, Bethesda Row and Oak Street, are significantly wider, with 14- and 17-foot-wide sidewalks, respectively. Destination retail streets have the largest sidewalks, with most ranging between 15 and 20 feet wide. Avenue d'Champs-Elysees takes the prize for widest sidewalks in this study, averaging 40 feet.
Number of Blocks in Length	○	Streets range in length from two to 12 blocks.
Public Open Space	◒	Most of the suburban model streets do not have open spaces; almost every urban model street does.
Streetscape Design Program	◒	Of the streets in this survey, 2/3rds have an established streetscape program.
Located with a Business Improvement District (BID)	○	Only two out of 16 model streets are located within a BID.
Supported by a Merchant's Association or Non-Profit Organization	●	Every surveyed street is supported by an umbrella organization that represents the collection of businesses located there.
Located within an Historic District	●	Most of the evaluated streets (12 out of 16) are located within historic districts.
Underground Electrical and Telephone Lines	●	Every model retail street has underground utility lines.

legend	
○	Not a relevant factor
◒	Relevant for small-scale streets or destination streets
●	Relevant factor

Previous theories suggested that high-performing retail streets might be dependent upon singular ownership of parcels. An effective alternative might be if independent landowners and tenants cooperate on management and promotion.

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the building blocks of a vibrant street – table two: market conditions

element	relevance	explanation
Residential Population Within 1/2 Mile	◒	With the exceptions of Madison Park, Oak Street, and Third Street Promenade, the populations surrounding the model retail streets correspond to the site conditions in which they are found: populations for urban streets are denser than suburban ones, which are denser than rural ones. Population densities for destination retail streets appear to have a minimum of 20,000 residents within a half-mile.
Median Household Income Within 1/2 Mile	◒	The median household income in five of the 16 surrounding neighborhoods is lower than the national average. Income ranges from $41,416 in Santa Monica to $114,915 in Brooklyn.
Daytime Population Within 1/4 Mile	◒	Daytime populations are higher for destination retail streets than for small-scale shopping streets.
Average Retail Rents	◒	Retail rents along small-scale shopping streets range from $13 to $22 per square foot for all areas except Charles Street, Bethesda Row, Atlantic Avenue and Oak Street, with no attributable distinctions. Rents along U.S. destination streets range from $80 to $165 per square foot. Lease rates along the Champs d'Elysees ($793/sf) regularly place this street in the top three highest retail rent districts worldwide. Omotesando Dori is in the process of enhancing its world-class retail image with the completion of the Omotesando Hills shopping center, suggesting that its $330 per square foot average asking rent will be increasing. Typically, destination retail streets in European and Asian countries are perceived as better capable of catering to international shoppers' communication and currency conversion needs.
Conditions of Property Ownership	○	With the exception of Bethesda Row, which is primarily under the ownership of Federal Realty Investment Trust, the small-scale shopping and destination retail streets studied are under the control and management of various landowners.
Retail Vacancy Rate	●	Only Carytown in Richmond and East Davis Street in Culpeper have retail vacancy rates that exceed the national average of 12.1 percent.

legend	
○	Not a relevant factor
◒	Relevant for small-scale streets or destination streets
●	Relevant factor

While the population density and income of surrounding areas clearly are relevant to the success of retail districts, this data analysis suggests that districts need not shine in every category. It is important to note, however, that each of the model streets has impressive demographics or income statistics in at least two of the four measured categories. For example, several neighborhoods have high workforce populations and high median household incomes, which presumably offset the impact of low residential populations.

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the building blocks of a vibrant street – table three: mixes & types of uses

element	relevance	explanation
Mix of Retailers by Type: • Neighborhood Goods & Services (NG&S) • Food & Beverages (F&B) • General Merchandise, Apparel, Furnishings & Other (GAFO)	○	In six of the 10 small-scale shopping streets studied, Food & Beverage establishments constitute a majority. In only one (Carytown), Neighborhood Goods & Service tenants predominate. Main Street in Manayunk and Charles Street in Boston have more space allocated to shoppers' goods (or GAFO) retail than any other use. Oak Street in Chicago is overwhelmingly dominated by upscale, boutique retail tenants due to its fashion niche strategy. Three streets (Carytown, Manayunk, and Charles Street) have mixes that are close to evenly distributed among all three retail categories. Among the destination retail streets: • More than 50 percent of the available retail space is occupied by General Merchandise, Apparel, Furnishings, & Other (GAFO) retailers. • Food & Beverage retailers occupy less than 25 percent of total amount of retail space. • Neighborhood Goods & Services is virtually nonexistent in some neighborhoods. In the others, it accounts for a significant share of available space, ranging from one-fifth to one-third.
Estimated Ratio of Local/ Regional Tenants to National Chains	●	Small-scale shopping streets are overwhelming occupied by local and regional tenants, by approximately a 10:1 ratio. Destination retail streets trend in the opposite direction, with high percentages of national tenants. Newbury Street in Boston is the single exception due its merchandising focus on high-end, local, one-of-a-kind boutiques and restaurants.
Supported by a Civic or Cultural Anchor	●	With the exception of Oak Street, every model vibrant street has either a civic or cultural anchor. Four small streets have both. The destination streets have both civic and cultural anchors. The civic anchors, in particular, are of a size, scale and importance to greatly expand the potential trade areas for each street's retailers (i.e., Philadelphia's Rittenhouse Square, Boston's Public Garden, Chicago's Old Water Tower, Paris' Arc de Triomphe, and the Harajuku District in Tokyo).

legend	
○	Not a relevant factor
◒	Relevant for small-scale streets or destination streets
●	Relevant factor

There are no clear patterns in the proportions of uses in the model retail districts. One possible explanation: even though the streets were separated by type and scale (neighborhood and destination), various factors would further segment these streets by type. Examples might include a neighborhood restaurant row, a grocery-anchored street, and a retail niche market district. These subsets might have vaguely similar proportions of retail uses. Even with this additional level of differentiation, the mix of uses would be affected by lease rates, structural limitations, primary trade area customer profiles, and nearby competition.

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the building blocks of a vibrant street – table four: transit & accessibility features

element	relevance	explanation
Average Daily Traffic Count	●	With the exception of Davis Street in Culpeper and Atlantic Avenue in Brooklyn, traffic counts on the small-scale retail streets range from 10,000 to 16,000 vehicles per day. This could indicate an ideal condition for traffic volume along small retail streets -- enough vehicles to provide a high amount of visibility, yet not too much traffic to limit accessibility or cause distractions. Additional evaluation would be necessary to test this idea.
Walk Score*	●	The modeled vibrant streets located within the United States have an average Walk Score of 94.
Estimated Vehicles Per Household Within 1/4 Mile	●	With only one exception (Main Street in Culpeper, the only rural street in the study), the households within a 1/4 mile around every vibrant retail street have fewer cars than the national average. This is true even of suburban markets like Richmond, Frederick, Manayunk, and Bethesda.
Number of Bus Routes	○	Six of the 16 model streets have no direct bus access. North Michigan Avenue serves as a transit spine for 16 bus routes.
Subway/Light-Rail/Streetcar Stops	○	Seven of the 16 model streets have no direct, non-bus transit access.
Public Parking Facilities	●	Parking availability appears to be a must for suburban, rural, and destination streets, but not as necessary for small-scale urban retail streets.

legend	
○	Not a relevant factor
◒	Relevant for small-scale streets or destination streets
●	Relevant factor

* Walk Score is a website (www.walkscore.com) that generates "walkability" scores from 1 to 100 for properties and neighborhoods based on the ability to access services and attractions on foot.

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Based on these findings vibrant retail streets typically share the following attributes:

managed
Support from an active Merchants' Association or Non-Profit Organization provides clear leadership and serves as a surrogate for single landownership for most vibrant retail streets.

retail-appropriate
Ground-floor spaces along vibrant streets have high ceiling heights (12 feet or more), transparent storefronts, adequate sidewalks (8 feet and more), and few disruptions in retail continuity (few instances of interference by professional offices, open spaces, residential-only buildings, etc.)

mixed
The types of retail tenants on vibrant streets reflect the market demand. Unsupportable tenants are not artificially introduced. That said, the merchandising mixes on most vibrant streets have a prevailing retail category (NG&S, F&B, or GAFO) with smaller percentages of tenants from the other two retail categories.

safe
Regardless of the crime statistics for the neighborhood, vibrant streets maintain a perception of safety.

championed
A vibrant retail street is likely to show signs of investment, either by the public or private sector. Examples of these investments can include major development, street furniture, public art, and removal of above-ground power lines, to name a few.

anchored
The street is activated by a civic or cultural anchor that attracts people for purposes other than commerce.

walkable
A vibrant street is part of a walkable community and is supported by pedestrian-oriented residents.

unified
Vibrant streets generally have a common character or theme, often historical in nature, that binds the street's range of uses.

local or national
A majority of the district's shops are either local tenants or national chains.

accessible
Establishments along a vibrant street are well-served either by transit or by adequate parking facilities, but not necessarily both.

visible
Surrounding streets have enough traffic to ensure visibility, but not so much that the area is difficult to access.

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how can we reinforce these attributes to create vibrant streets?

innovative approaches and best practices

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Each retail street in the District of Columbia is at a different stage in its vibrancy cycle. Some more established areas, such as Georgetown and Dupont Circle, are held up as examples for other cities to emulate. Others, including the Capitol Waterfront and Anacostia, have great potential to thrive. For retail clusters anywhere on this spectrum, efforts are underway across the country to support, spur, and sustain commercial environments that can influence how DC supports its stores, eateries, and services.

It is important to note, however, that achieving and maintaining retail vibrancy is similar to aiming at a constantly moving target. New competition, shifting consumer behaviors, internet shopping, changing demographics can quickly alter how well a street addresses the needs of its customers. The most prosperous, timeless, and vibrant streets have established innovative approaches and best practices that make it easier to adapt to shifting trends and to meet changing markets before vibrancy fades.

Several cities, business associations, and non-profit organizations are leading the charge to experiment with creative approaches to assist and impact retail districts. Austin, Texas offers several of the best examples for addressing the needs of small shopping streets. Boston and Philadelphia have undertaken focused initiatives toward issues facing urban retail conditions, specifically. These communities have established the foundations upon which a DC retail district toolbox can be established.

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structuring a buy local campaign under an independent business alliance

what: "Keep Austin Weird"/ "Buy Local" Campaign

where: Austin, TX

who: Austin Independent Business Alliance (AIBA)

how: Non-Profit Organization

Austin Independent Business Alliance (AIBA)

A 2011 Independent Business Survey reported that small retailers in communities with "buy local" campaigns reported an average gain in revenue of 5.6%, compared to 2.1% gains for similar shops elsewhere. Downtowns such as Austin, Texas; Louisville, Kentucky; Portland, Oregon; Philadelphia, Pennsylvania; Cambridge, Massachusetts; and New Orleans, Louisiana, have reinvented the notion of customer loyal programs by encouraging patronage of locally owned operations.

A citywide organization of local-ownership businesses can offer structure and representation to qualified retailers. The Austin Independent Business Alliance works with city officials and staff on issues related to the impact of large chains entering the market, the need for local representation in major developments; and the effect new regulation would have on small retailers.

recognizing clusters of local retailers

what: Independent Business Investment Zones (IBIZ)

where: Austin, TX

who: Austin Independent Business Alliance (AIBA)

how: Non-Profit Organization

Austin Independent Business Alliance (AIBA)

Through AIBA, the City of Austin recognizes seven Independent Business Investment Zones (IBIZ). The benefits of participation include access to staff resources to organize the management of the district, district signage, and a budget for district-wide marketing efforts.

The Downtown Partnership of Baltimore, Inc., takes this idea a step further by offering up to $100,000 in flexible gap financing in the form of below-market interest rate loans. Businesses eligible for this $hop Baltimore Loan Program are local-owned and within the City's version of IBIZ, Retail Business District License areas, or in a Main Street district.

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training neighborhood representatives to serve as retail brokers

Kristen Bardem, Adams Morgan BID; James McCandless, streetsense

Many urban neighborhoods face the challenge of persuading the commercial brokerage community to invest the time and effort necessary to secure tenants in non-traditional spaces or areas. Brokers are typically paid a commission-based fee derived from the total value of the signed lease, regardless of the number of hours spent to secure the tenant. For this reason, many economic development offices are undertaking many, if not all, of the responsibilities traditionally assumed by a broker.

harvesting home-grown retail entrepreneurs

what: Startup Stampede

where: Durham, NC

why: Economic Development

who: Greater Durham Chamber of Commerce and Downtown Durham Inc.

how: Non-Profit Organizations

Downtown Durham, Inc.

As a method to attract new businesses to the downtown area and to activate underutilized space, the Greater Durham Chamber of Commerce and Downtown Durham, Inc. created a program known as Startup Stampede. Once selected for the program, prospective businesses move into a centralized office location to complete business plans, receive technical assistance, and network -- with the added advantages of rent-free offices, meeting space, office furniture, and wi-fi.

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approaching retailers from an urban perspective

what: Be In On It!

where: Philadelphia, PA

who: Philadelphia Retail Marketing Alliance

how: Private/Public Partnership Initiative

Center City District Philadelphia

For its major marketing launch in 2010, the non-profit organization City Center Philadelphia took an urban approach to its data. In addition to traditional population and income statistics, the group added charts and figures highlighting pedestrian counts and concentrations of sidewalk cafes throughout the Center City district.

counting pedestrians & bicyclists as consumers

what: National Bicycle and Pedestrian Documentation Project

where: Internet-based Initiative

how: Professional Association

Alta Planning + Design

Under the direction and methodology of the National Bicycle and Pedestrian Documentation Project (www.bikepeddocumentation.org), the Seattle, Vancouver (WA), San Jose and Sacramento transportation departments are undertaking efforts to count pedestrians and bicyclists. The data gained from this effort will allow retail marketing efforts to accurately reflect the full breadth of customer activity in these communities.

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extending BID benefits to smaller commercial districts

what: Micro District Program

where: San Diego, CA

who: Business Improvement District Council, San Diego

how: Public/Private Partnership

Luci Dumas Fine Photography

For areas that do not meet the threshold of business concentration to warrant business improvement district (BID) designation, the City of San Diego recognizes "micro districts." These smaller groupings of 100 to 250 members have the ability to apply for grants that aid in their efforts to create formal organizations and eventually receive non-profit status. Advantages of micro district designation include technical assistance from the City's BID Council, access to City-owned Special Events Equipment at no charge, and the ability to offer coordinated representation for marketing purposes, at City Hall, and during discussions with local neighborhood groups.

attracting sit-down restaurants

what: Neighborhood Restaurant Initiative

where: Boston, MA

who: Office of Business Development

how: U.S. Department of Housing and Urban Development Loan Program (Local Government Administered)

Office of Business Development: Boston, MA

Boston's Office of Business Development sponsors a citywide Neighborhood Restaurant Initiative that offers loans, technical assistance and façade-improvement grants (up to $100,000 in value). Qualified establishments are sit-down, family-style restaurants that are locally owned and will create 10 or more jobs.

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optimizing retailers' collective buying power

what: Boston Buying Power

where: Boston, MA

who: Office of Business Development

how: Energy Purchasing Program Coordinated by Local Government

Office of Business Development: Boston, MA

Retailers, government agencies, universities, and hospitals in Boston have the option of participating in the utility collective called Boston Buying Power. Through the Office of Business Development, a private firm was selected through a Request for Response (RFR) process and now serves as the conduit to manage the agreements and accounts of the collective, while negotiating lower prices for the group.

renovating streetfront spaces for tenant occupancy

what: Large Projects Incentive Program

where: West Palm Beach, FL

who: Downtown Development Authority

how: Grant Awarded Through Independent Taxing District Funds

Courtesy of West Palm Beach DDA

West Palm Beach, Florida, offers low-interest loans to property owners willing to convert their ground-level spaces into "vanilla boxes," ready to be occupied by a retail tenant. A vanilla box is a desirable leasing condition, especially in an historic downtown area where the extent of improvements is often unknown until renovation begins. The Downtown Development Authority awards grants up to $150,000 or up to 30 percent of the total improvement cost for issues related to code compliance. Eligible improvements include mechanical, plumbing, electrical and accessibility upgrades.

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limiting banks in retail districts

what: Zoning Resolution, City of New York; Article 81-42; Retail Continuity Along Designated Streets

where: New York, NY

who: City Planning Commission and Department of City Planning

how: Zoning Resolution

American Girl Store, Inc.

In retail areas, continuity keeps customers exploring, while blank walls created by banks can end a shopping trip. Article 81-42 of the Zoning Resolution of the City of New York effectively limits bank frontage allowed along Fifth Avenue to less than fifteen percent of total linear feet per block face.

Similar measures have been introduced in the downtown districts of Philadelphia, Pennsylvania and New Canaan, Connecticut.

encouraging negotiation in lieu of overlays

what: City of Chicago Liquor Code Chapter 4-60: Deleterious Impact/ Public Nuisance Ordinance

where: Chicago, IL

who: Local Liquor Control Commission

how: Liquor Enforcement Regulation

The Berghoff Restaurant

Numerous cities and counties across the country have enacted liquor moratoriums to curb a growing concentration of bars and restaurants. Nuisance impacts on adjacent residents, including littering, loitering, public exposure, late-night noise, and parking hassles, are common motivators for the introduction of a liquor moratorium.

The City of Chicago provides a mechanism for its citizens through its Deleterious Impact/Public Nuisance Ordinance. The mechanism is triggered if at least five residents who live within 500 feet of an establishment file a complaint stating that the business has created a public nuisance and has not taken the necessary steps to remedy the issue. The residents or their community association must demonstrate that the activity of the business has had an adverse effect on the value of any property; increased the risk of violations of the law; or substantially increased noise, litter, or vehicular congestion. A deleterious impact is assumed if a substantial number of arrests have occurred within 500 feet of the establishment over the preceding two years. The establishment's license may be revoked or suspended for two years, and no new liquor license for the location will be issued for at least one year.

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coordinating city-wide retail initiatives

Toronto Association of Business Improvement Areas

Several cities, including New York City, San Diego and Toronto, provide government oversight for their business district management entities. The levels of supervision vary, but usually involve active support and encouragement of new business improvement districts, distribution of City funds for grants to organizations, and coordination of security and maintenance contracts among business district groups.

The greatest benefit of this type of public involvement is that retail clusters formerly considered too small or "land poor" to generate sufficient assessed fees become able to support a business improvement district or similar organization. This has particular resonance in the District, where so many neighborhood retail centers are less than a few blocks in length or in lower-income areas.

An additional advantage of coordination at the city level is the inherent clarity of comprehensive retail vision, strategy and development. In New York City, the Department of Small Business Services guides the 56 business improvement districts (BIDs) and serves as the focal point for retail-related policy and planning. A non-profit organization, the Toronto Association of Business Improvement Areas, fills a similar role in that city. In San Diego, the Office of Small Business administers the coordinated BID program.

focusing retail related inquiries through one digital gateway

what: www.philadephiaretail.com

where: Philadelphia, PA

who: Philadelphia Retail Marketing Alliance

how: Website/Information Portal

www.philadelphiaretail.com

The City of Philadelphia takes a less aggressive, yet still comprehensive, approach to retail strategy. The Philadelphia Retail Marketing Alliance is a consortium of representatives from non-profit organizations, city agencies, tourism organizations, and development groups that commit staff and resources to a unified campaign and single point-of-contact for questions and issues related to downtown retail. Information related to demographics, incentives, permitting, neighborhood information, and available spaces is presented in one place, at www.philadelphiaretail.com. One staff person is available to guide potential retailers, who otherwise would have to deal with a variety of contacts to lead them through the start-up and approvals processes.

Communities with a variety of agencies and organizations coordinating retail policy and planning benefit from harnessing the information in one central location. Websites such as www.philadelphiaretail.com, provide a one-stop shop for developers, tenants, and customers alike.

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investigating additional sources of federal funding

what: New Market Tax Credits

how: Community Development Institutions Fund (CDIF), U.S. Department of the Treasury

Federal Reserve Bank of San Francisco

New Market Tax Credits are available to certified banking institutions or development enterprises that meet the Treasury Department's criteria for eligibility. In turn, these entities are able to extend the tax credits for programs that enhance qualifying, low-income neighborhoods. Programs and activities that may be financed include retail improvement projects, grant initiatives, and low-interest loan incentive packages.

creatively financing local heritage businesses

what: Buffalo Street Books

where: Ithaca, NY

how: Consumer Cooperative

Buffalo Street Books

Early in 2011, the owner of Buffalo Street Books was planning to close until the community organized a local stock purchasing program, raising over $250,000 to purchase and operate the store. In the months since its successful acquisition, Ithaca community members have run the bookstore as a consumer cooperative, offering additional stock purchases and allowing non-voting memberships to supplement operational costs.

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what are retailers looking for?

site selection and market evaluation in DC

When selecting a site for a store or restaurant, a knowledgeable entrepreneur undertakes a systematic analysis. How might a retailer eyeing Washington, DC, choose among its neighborhoods (submarkets) and then hone in on a particular storefront?

Although every retailer evaluates sites differently, retail categories have common requirements for an ideal location.

In general, fresh produce stands, pharmacies, florists, dry cleaners and nail salons (Neighborhood Goods & Service category -- NG&S) have similar demands. So do restaurants, cafes, bars and coffee shops (Food & Beverage category -- F&B) and stores selling luggage, electronics, apparel and books (General Merchandise, Apparel, Furnishings, and Other category -- GAFO). The bottom line, of course, is whether enough customers will spend enough money to make their business a success.

Put another way:

- How many potential customers can be captured?
- How much do they spend on average?
- Do they match my customer profile?
- What is the price, quality, and character of the surrounding retail competition?

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population

For an urban environment especially, retailers first want to know how many people live within the neighborhood or region they would be serving. This involves both numbers and density. These figures are generally obtained from a data collection service that receives the raw data from the U.S. Census Bureau.

For Neighborhood Goods & Services retailers, the population hurdle is relatively low; everybody needs basic goods and services. Food & Beverage tenants require a larger minimum population, since most people eat out but enjoy some variety. General Merchandise, Apparel, Furnishings & Other (or GAFO) establishments are looking for a high population with unmet shopping needs. Every person may not purchase a new suit often, but many people doing so infrequently can generate a sufficient amount of business to sustain a store.

median household income

Median household income is considered a reliable indicator of a neighborhood's spending power. While the cost of groceries, medicines and laundry is the same for everyone, regardless of income, the percentage of household spending that goes to these basic goods and services influences retailer site selection.

As with population, Neighborhood Goods & Services tenants have a low threshold for median household income. This retail category is "the great equalizer," since every socioeconomic group needs and patronizes these stores. Food & Beverage retailers follow the theory that a customer must have additional disposable income following the purchase of basic necessities, and GAFO establishments take this notion a step further. Simply put, if a patron has a bit of extra money after buying groceries, he's more likely to eat out occasionally. With yet more spending cash, he will buy clothes, a couch or a computer.

daytime population

With approximately 15% of household purchases originating from the workplace, daytime population has become an increasingly important tool for retailers, especially Food & Beverage entrepreneurs who can capture a time-limited lunchtime crowd.

Neighborhood Goods & Services tenants will enter a neighborhood with a low daytime population, which is less important to this retail category than residential population. Food & Beverage retailers seek high densities of daytime population, as this audience sustains their business while the local residential population is at work. Some urban downtowns struggle with Food & Beverage tenants that are not open on evenings and weekends precisely because workday sales are their primary, or perhaps only, source of revenue. GAFO tenants regard the daytime population sales as icing. They appreciate the daytime activity, might generate occasional lunchtime sales, but do not rely on the workforce to make or break their business.

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educational attainment

Over the past decade, the level of academic achievement within a neighborhood has become increasingly important to retailers, who are evaluating not only the current income levels of the residents but also their earning potential. Although regional and national Neighborhood Goods & Services tenants also like to see strong secondary education levels, their primary concern is a concentration of high school graduates -- a potential workforce for their stores.

vehicular traffic counts

Average Automobile Daily Trips (AADT), or traffic counts, are used by retailers as an indicator of how visible a site, street, or neighborhood is. The minimum requirement for each retail category correlates to the size of the trade area it needs. Neighborhood Goods & Services tenants rely heavily on a local customer base and therefore can pursue areas with lower traffic counts. For these tenants, pedestrian counts may be more important than vehicular counts. Since customers are more likely to shop for basic goods and services close to home or sometimes work, a flow of car commuters through the area does not help an Neighborhood Goods & Services retailer. General Merchandise, Apparel, Furnishings & Other tenants attract patrons from a much larger area. Most people purchase jewelry, furniture, and electronics infrequently, and high traffic counts equate to repeated exposure to potential customers.

pedestrian counts

For urban retail locations, non-vehicular counts are becoming increasingly important. Food & Beverage tenants have the greatest level of interest in pedestrian and bicycle traffic counts, for two reasons. Retailers such as coffee, ice cream and sandwich shops need passersby who will make a quick purchase decision; there is little premeditation in the transaction. For sit-down dining establishments, pedestrian and bicycle counts help conjure the lifestyle of the street. Areas where people are strolling and can experience a retailer through sight, sound and smell are more likely to support a successful restaurant environment.

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metro accessibility

Within the DC market, Metro accessibility has gained relevance. Emerging neighborhoods such as 14th & U Streets, Petworth and NoMa are anchored by their transit stations. For Neighborhood Goods & Services and Food & Beverage retailers, close proximity to Metro practically ensures that the neighborhood's residents have regular patterns of activity that pass retail locations – dry cleaning dropped off on the way to work, the happy hour on the way home, etc.

retail competition

Neighborhood Goods & Services retailers seek areas where they might be surrounded by complementary Neighborhood Goods & Services tenants, though not, of course, direct competitors offering the same goods or services. Food & Beverage retailers want to be surrounded by other Food & Beverage tenants, as a cluster of food options drives more customer traffic than a single establishment. General Merchandise, Apparel, Furnishings & Other (GAFO) retailers' preferences fall somewhere in between. Other stores that attract similar types of customers are ideal, but direct competition close by can draw price comparisons. Boutique tenants would much prefer to keep the focus on brand and quality, not cost.

cannibalization

Within the retail community, "cannibalization" refers to when a store opens a second location close to an existing one, threatening to cut into the latter's sales. For Neighborhood Goods & Services retailers, cannibalization is of minimal concern, since market saturation is the goal. Food & Beverage establishments with more than one location have greater flexibility than other retail categories: They can open nearby establishments under another name, or with a variant of their existing concept, and not directly compete. Because of the large sizes of their trade areas, GAFO retailers are most affected by cannibalization. With a limited amount of market share within any given area, two locations of the same retailer may split sales to the point of rendering both of them unprofitable.

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key criteria in evaluating urban retail submarkets

Based on data evaluations of 15 neighborhood's throughout Washington, DC, the following city-specific, minimum conditions for retailers by category are applicable:

criteria	neighborhood goods & services	food & beverages	general merchandise, apparel, furnishings & other
Population	At least 1,000 people within 1/4 mile	At least 7,500 people within 1/2 mile	At least 30,000 people within 1 mile
Median Household Income	At least $35,000 per year for households within 1/4 mile	At least $45,000 per year for households within 1/2 miles	At least $50,000 per year for households within 1 mile
Daytime Population	At least 5,000 people within 1/4 mile	Over 15,000 people within 1/2 mile	At least 10,000 people within 1/2 mile
Educational Attainment	At least 25% of residents within a 1/4 mile with a Bachelor's Degree or higher	At least 25% of residents within 1/2 mile with a Bachelor's Degree or higher	At least 30% of residents within 1 mile with a Bachelor's Degree or higher
Pedestrian Counts	At least 20 passing pedestrians per hour	At least 60 passing pedestrians per hour	At least 40 passing pedestrians per hour
Metro Accessibility	A Metro stop within 3 blocks	A Metro stop within 3 blocks	Metro accessibility often irrelevant
Vehicular Traffic Counts	At least 5,000 vehicles per day (also known as average automobile daily trips or AADT)	At least 7,500 vehicles per day (AADT)	At least 15,000 vehicles per day (AADT)
Level of Retail Competition	An existing concentration of grocery, drug-store, dry cleaner, salon and barber type establishments within close proximity	An existing concentration of restaurants, cafes, and/or bars within close proximity	A small concentration of existing GAFO shops within close proximity
Cannibalization	Often irrelevant	Varies	Major concern. Retailers will not want to open a second location close to another.

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Based on data evaluations of 15 neighborhood's throughout Washington, DC, the following city-specific, boutique retail conditions by category are applicable:

criteria	neighborhood goods & services	food & beverages	general merchandise, apparel, furnishings & other
Population	At least 2,000 people within 1/4 mile	At least 10,000 people within 1/2 miles	At least 50,000 people within 1 mile
Median Household Income	At least $65,000 per year for households within 1/4 mile	At least $65,000 per year for households within 1/2 mile	At least $75,000 per year for households within 1 mile
Daytime Population	At least 7,500 people within 1/4 mile	Over 45,000 people within 1/2 mile	At least 25,000 people within 1/2 mile
Educational Attainment	At least 40% of residents within 1/4 mile with a Bachelor's Degree or higher	At least 40% of residents within 1 miles with a Bachelor's Degree or higher	At least 50% of residents within 1 mile with a Bachelor's Degree or higher
Pedestrian Counts	At least 20 passing pedestrians per hour	At least 60 passing pedestrians per hour	At least 40 passing pedestrians per hour
Metro Accessibility	A Metro stop within 3 blocks	A Metro stop within 3 blocks	Metro accessibility often irrelevant
Vehicular Traffic Counts	At least 5,000 vehicles per day (also known as average automobile daily trips or AADT)	At least 7,500 vehicles per day (AADT)	At least 15,000 vehicles per day (AADT)
Level of Retail Competition	An existing concentration of grocery, drug-store, dry cleaner, salon and barber type establishments within close proximity	An existing concentration of restaurants, cafes, and/or bars within close proximity	A small concentration of existing GAFO shops within close proximity
Cannibalization	Often irrelevant	Varies	Major concern. Retailers will not want to open a second location close to the first.

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Community members, city officials, and the business community often become frustrated when retail spaces remain vacant for extended periods of time. In certain instances, including a landlord's unrealistic rent expectations or a tenant's unwillingness to see potential in an urban location, this frustration is certainly justified.

In many cases, however, dismay may arise from a lack of understanding. The difficult and detailed processes that a retailer often undertakes to select a location frequently disqualifies sites from consideration. If a businessperson cannot project sufficient sales to sustain operations, they will be extremely hesitant to invest their money, hard work, and reputation in a location.

As a wider variety of retailers enter and flourish in cities, the metrics for this decision-making process are becoming more sophisticated with a better understanding of how to make selections within urban neighborhoods.

The following pages model decision-making processes for different types of retailers, each evaluating three DC neighborhoods. These diagrams illustrate the conditions that propel a retailer forward, or stop them dead in their tracks. Fundamentally, however, every new store, restaurant or service business needs people spending money who can find and reach them.

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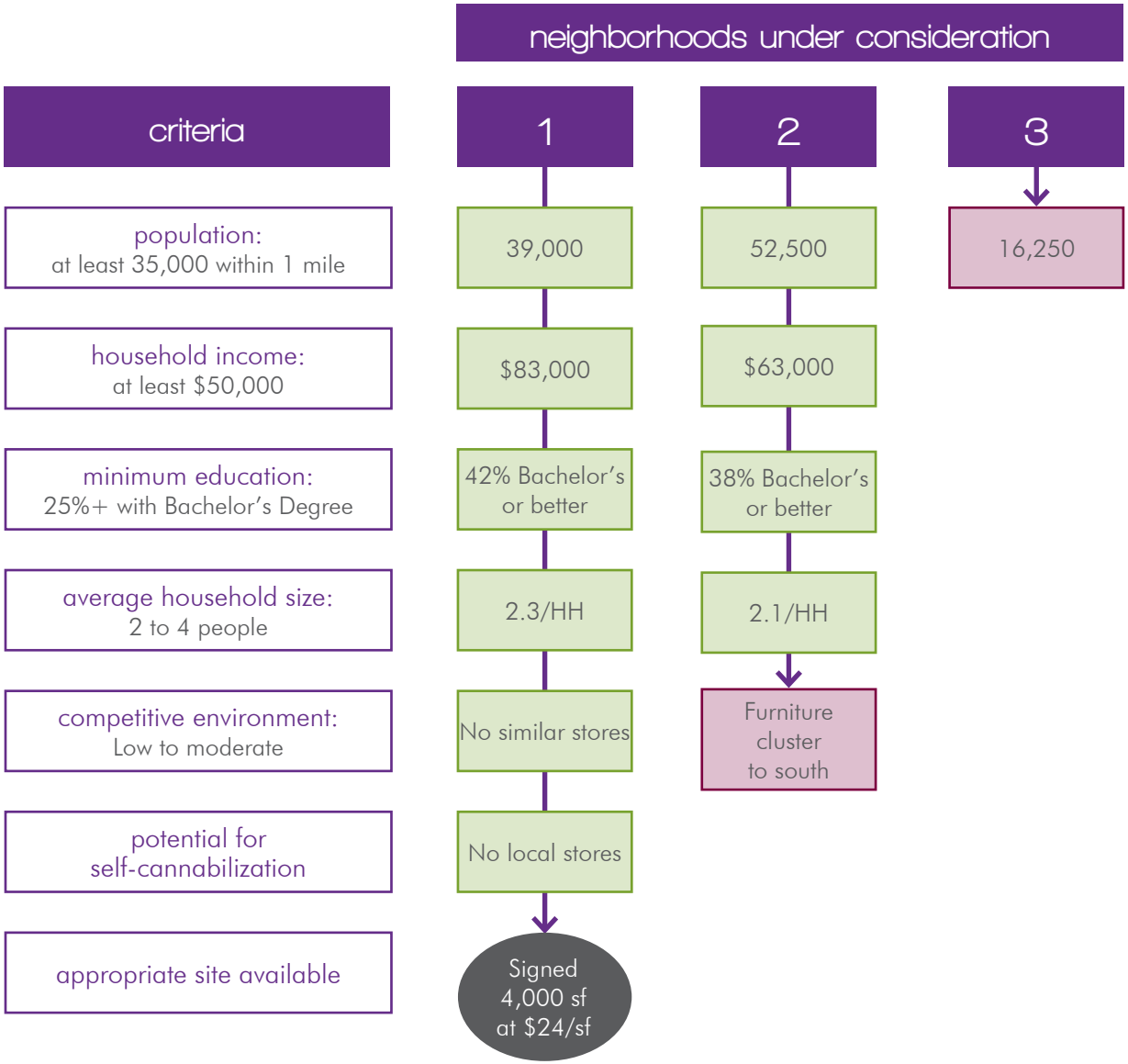

home decor

Regional

A regional home décor retailer entering the DC market for the first time evaluates neighborhoods 1, 2, and 3.

Neighborhood 3 does not meet the retailer's minimum population standard and is eliminated from further consideration.

Neighborhoods 1 and 2 satisfy the requirements for average household income, educational attainment and household size.

During the competition assessment, a cluster of furniture stores are identified immediately south of Neighborhood 2, rendering its available site undesirable.

Neighborhood 1 meets all of the retailer's criteria, and a lease is executed.

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criteria	neighborhoods under consideration: 1	2	3
population: at least 10,000 within 1/2 mile	36,000	18,000	5,000
daytime population: at least 15,000 within 1/2 mile	102,500	17,200	
pedestrian count: 50+ per hour	120/hr	80/hr	
traffic count: at least 5,000 AADT	29,000 AADT	13,000 AADT	
access to metro: Within 3 blocks	2 blocks to Red Line	1 block to Yellow/Green Line	
competitive environment: Moderate to high	Dining cluster	Dining cluster	
appropriate site available	2,000 sf at $42/sf	Signed 1,400 sf at $39/sf	

fast-casual food

Local

A DC-based, fast-casual concept opening its first establishment considers locations in three neighborhoods.

The first level of site selection focuses on (residential) population density. Neighborhood 3 does not meet minimum thresholds.

Neighborhoods 1 and 2 pass muster for the following criteria in order of importance: daytime population, pedestrian count, traffic count, Metro accessibility, and competition.

All other factors being equal, a lease is signed for a site in Neighborhood 2, based on the desired size of space and the affordability of the rent.

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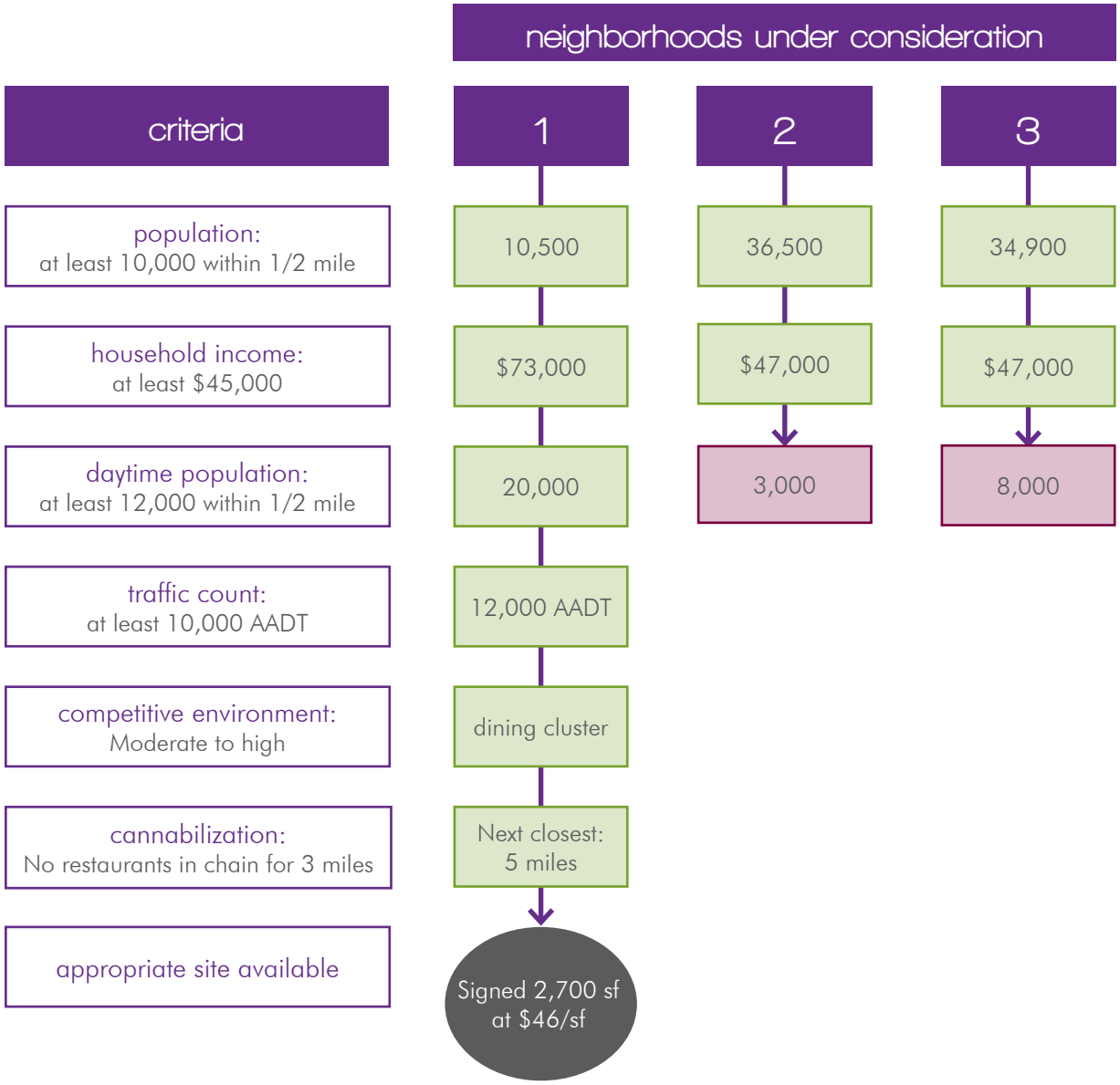

sit-down restaurant

Regional

For its first location within the DC borders, a regional sit-down restaurant narrows its choices to three neighborhoods. All three commercial districts are considered appropriate based on residential population density and average household income.

However, daytime populations in Neighborhoods 2 and 3 are insufficient to guarantee adequate weekday lunch and post-work customer traffic.

Neighborhood 1 satisfies the tenant's criteria, and a lease is signed.

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organic grocery store

Regional/Local

criteria	neighborhoods under consideration: 1	2	3
population: at least 7,000 within 1/2 mile	8,000	12,000	18,500
household income: at least $45,000	$62,000	$85,000	$54,000
minimum education: 25%+ with Bachelor's Degree	35% Bachelor's or better	44% Bachelor's or better	26% Bachelor's or better
traffic count: at least 10,000 AADT	12,000 AADT	6,000 AADT	22,000 AADT
access to metro: within 5 blocks	4 blocks to Red Line		3 blocks to 3 stations
competitive environment: low	One grocery		None
applicable incentive program	Not located in STC Zone		Located in STC Zone
appropriate site available			No locations 3,000+ sf

An organic grocery seeks a DC location following several successful ventures in the suburbs. The three neighborhoods under consideration easily meet the retailer's top three requirements, for minimum residential population density, average household income and educational attainment.

The traffic counts in Neighborhood 2 are lower than in the other two commercial districts. As a result, this area is deemed less visible.

Metro accessibility and area competition are acceptable in both remaining neighborhoods. As the financial realities of leasing in these commercial districts become obvious, the tenant seeks assistance from City government programs and learns about the Supermarket Tax Credit (STC), which awards tax and business license fee exemptions to grocery stores locating in Priority Development Areas.

Though Neighborhood 3 is located within an Priority Development Area, an appropriately-sized site cannot be found.

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spa & salon

National

criteria	neighborhoods under consideration: 1	2	3
population: at least 2,500 within 1/4 mile	3,000	11,500	2,500
household income: at least $40,000	$42,000	$73,000	$62,000
daytime population: at least 7,500 within 1/4 mile	9,500	11,000	8,000
traffic count: at least 7,000 AADT	23,000 AADT	22,000 AADT	12,000 AADT
access to metro: within 5 blocks	1 block to Blue Line	4 blocks to 2 lines	4 blocks to 3 lines
competitive environment: Low to moderate	A few local salons	A few local salons	None
appropriate site available	Signed 1,800 sf at $14/sf	Signed 1,200 sf at $18/sf	Signed 1,000 sf at $35/sf

A salon and day spa with locations across the country wants to make a big splash with its first DC store. Based on experience in other markets, the company is confident it has a reasonably low threshold to enter new neighborhoods in terms of population, income, and competition. Operations of its type appeal to a broad customer base.

At the conclusion of its due diligence, the company decides to open in each of the neighborhoods it evaluated.

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apparel store

National

criteria	neighborhoods under consideration: 1	2	3
population: at least 50,000 within 1 mile	65,000	82,000	68,500
household income: at least $55,000	$74,000	$73,000	$59,000
minimum education: 25%+ with Bachelor's Degree	33% Bachelor's or better	38% Bachelor's or better	35% Bachelor's or better
traffic count: at least 10,000 AADT	6,000 AADT	18,000 AADT	11,000 AADT
competitive environment: Moderate to high		Several regional apparel stores	None to low
cannabilization: None of the same store within 1 mile		Existing store 3 blocks away	
appropriate site available			

A women's apparel store with a "funky vibe" plans to open a second store in one of DC's trendier neighborhoods. Unlike the salon, this company has a high threshold for site criteria. Its inventory attracts a specific type of clientele that it needs in a high-enough concentration of customers to justify opening a store.

After filtering each area through its requirements, the retailer determines that none of the three is appropriate for new store investment at this time.

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diagnostic assessment

examining a street's retail condition and understanding its potential

In this section, the various pieces of this study come together.

- The attributes of vibrant retail streets serves as the framework for how to evaluate and improve your commercial core.
- The collected best practices are transformed into implementation steps that are appropriate for neighborhoods in Washington, DC.
- Retailers' site selection criteria becomes a diagnostic tool that communities can use to measure the relative strength of their retail market.

Neighborhoods are encouraged to first undertake a diagnostic assessment of their existing retail environment and to evaluate a realistic notion of its potential. From this understanding, resources can be more focused to the specific needs of each retail street, instead of a "one size fits all" approach.

Some tasks may seem small, but each effort is critical. By utilizing the tools within this kit, communities will have created the best possible conditions to cultivate their own vibrant retail street.

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retail inventory table instructions

Before you can determine your neighborhood's retail potential, you must discover what is already there. The instructions below offer simple guidance to complete the form found on the following page. Feel free to adapt the table that you use for your inventory to the specific needs of your community.

step one: set the boundaries

What are the limits of your neighborhood's retail district?

Instinctively, you probably already know. If doubt or disagreement remains, here are some general guidelines:

- Retail districts have continuous retail with few exceptions. At the very least, there is a string of ground-level spaces that are activated by a use that is accessible to the public (church, DMV office, daycare, etc). Large non-retail uses, such as apartment buildings, universities, government buildings, parks, typically signify the end of a retail district.
- With few exceptions, most neighborhood retail districts in DC will be 3 or 4 blocks long. If you believe that your core is larger, you might actually have more than one retail district in your area.

step two: to include or not to include?

The name "retail inventory" is misleading. The purpose of this table is to list all of the spaces in your commercial core that are "retail appropriate," regardless of their existing tenant or use. As the following table indicates, some of the listings in your inventory might be identified as occupied by office or even vacant. This condition happens when a retail appropriate space is the current home to a non-retail use.

Retail appropriate spaces often have storefronts, do not have front yards, and are typically adjacent to similar looking ground-level spaces. Generally, if the front of the building looks like it could be a great space for a store if it only had an awning and sign, it is probably retail appropriate.

step three: identify the retail category

- Neighborhood Goods & Services (NG&S): grocery stores, convenience stores, drugstores, florists, bakeries, delicatessens, butchers, dry cleaners, tailors, laundromats, hair salons, nail salons, day spas, pet salons, liquor stores, shoe repair and shine shops, key shops, produce stands, and similar types of tenants.
- Food & Beverage (F&B): sit-down restaurants, take-away food establishments, cafes, bars, coffee shops, sandwich shops, ice cream shops, fast-food restaurants, and similar types of tenants.
- General Merchandise, Apparel, Furnishings, and Other (GAFO): clothing stores, furniture stores, discount stores, bookstores, jewelry stores, stationery stores, gift stores, pet and pet-supply stores, home decor stores, sporting goods stores, craft stores, music stores, electronic stores, mattress stores, antique stores, camera stores, auto parts stores, hardware stores, and similar types of tenants.

step four: determine property owner

Property owner names and addresses can be found at http://propertyquest.dc.gov.

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retailer name	street no.	street name	use (retail/office/ vacant/other)	retail category (NG&S/F&B/ GAFO)	property owner	property owner address

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Gather the following information using an address near the center of your retail district as a data point.

demographic data

Request a complete demographic and income data package from the Washington, DC Economic Partnership (www.wdcep.com).

Specifically request:

- Population within 1/4, 1/2, and 1 mile radii
- Median Household Income with 1/4, 1/2, and 1 mile radii
- Daytime population within 1/4 and 1/2 mile radii
- Education level within 1/2, 1/4, and 1 mile radii

accessibility count

- Number of bus routes that serve your retail district (bus stops directly adjacent to the retail district). http://www.wmata.com/pdfs/bus/DC.pdf
- Distance to the closest Metro station. http://www.wmata.com/rail/maps/map.cfm
- Streetcar line planned or proposed through your retail district. http://www.dcstreetcar.com/streetcar-system-concept-plan.html

visibility count

- Pedestrian count for the main intersection in your retail district. http://www.mtc.ca.gov/services/arterial_operations/downloads/ped-bike/Handbook_Summary.pdf
- Traffic count along the principal street through your retail district. http://ddot.dc.gov/DC/DDOT/About+DDOT/Maps/Traffic+Volume+Maps/Archive+of+Traffic+Volume+Maps/Traffic+Volume+Map+2009

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neighborhood goods & services (NG&S) market assessment

	yes
POPULATION	
Less than 1,000 people within 1/4 mile	--
1,000 to 2,000 people within 1/4 mile	+1
More than 2,000 people within 1/4 mile	+4
MEDIAN HOUSEHOLD INCOME	
Less than $35,000 per household within 1/4 mile	--
$35,000 - $65,000 per household within 1/4 mile	+1
More than $65,000 per household within 1/4 mile	+2
DAYTIME POPULATION	
Less than 5,000 employees within 1/4 mile	--
5,000 - 7,500 employees within 1/4 mile	+1
More than 7,500 employees within 1/4 mile	+2
EDUCATIONAL ATTAINMENT	
Less than 15% with a Bachelor's Degree within 1/4 mile	--
15-25% with a Bachelor's Degree within 1/4 mile	+1
More than 25% with a Bachelor's Degree within 1/4 mile	+2
More than 20 pedestrians per hour on average	+1
Metro station with 3 blocks	+1
Traffic count of 5,000 AADT or higher along principal street	+1
An existing concentration of grocery, drugstore, dry cleaner, salon and barber type establishments in your retail district	+1

NG&S Score Indicator	
Over 10	Suitable market
5 to 9	Modest market
Under 5	Challenged market

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food & beverage (F&B) market assessment

	yes
POPULATION	
Less than 7,500 people within 1/2 mile	--
7,500 - 10,000 people within 1/2 mile	+1
More than 2,000 people within 1/2 mile	+2
MEDIAN HOUSEHOLD INCOME	
Less than $45,000 per household within 1/2 mile	--
$45,000 - $65,000 per household within 1/2 mile	+2
More than $65,000 per household within 1/2 mile	+3
DAYTIME POPULATION	
Less than 15,000 employees within 1/2 mile	--
15,000 - 45,000 employees within 1/2 mile	+1
More than 45,000 employees within 1/2 mile	+3
EDUCATIONAL ATTAINMENT	
Less than 20% with a Bachelor's Degree within 1/2 mile	--
20 - 30% with a Bachelor's Degree within 1/2 mile	+1
More than 30% with a Bachelor's Degree within 1/2 mile	+2
More than 60 pedestrians per hour on average	+1
Metro station with 3 blocks	+2
Traffic count of 7,500 AADT or higher along principal street	+1
An existing concentration of restaurants, bars, and cafes in your retail district	+1

F&B Score Indicator	
Over 10	Suitable market
5 to 9	Modest market
Under 5	Challenged market

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general merchandise, apparel, furnishings, and other (GAFO) market assessment

	yes
POPULATION	
Less than 30,000 people within 1mile	--
30,000 - 50,000 people within 1 mile	+1
More than 50,000 people within 1 mile	+2
MEDIAN HOUSEHOLD INCOME	
Less than $50,000 per household within 1 mile	--
$50,000 - $75,000 per household within 1 mile	+2
More than $75,000 per household within 1 mile	+5
DAYTIME POPULATION	
Less than 10,000 employees within 1/2 mile	--
10,000 - 25,000 employees within 1/2 mile	+1
More than 25,000 employees within 1/2 mile	+2
EDUCATIONAL ATTAINMENT	
Less than 25% with a Bachelor's Degree within 1 mile	--
25 - 40% with a Bachelor's Degree within 1 mile	+1
More than 40% with a Bachelor's Degree within 1 mile	+2
More than 40 pedestrians per hour on average	+1
Traffic count of 15,000 AADT or higher along principal street	+2
An handful of existing shops in your retail district	+1

GAFO Score Indicator	
Over 10	Suitable market
5 to 9	Modest market
Under 5	Challenged market

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By no means exhaustive, this list of facilities offers a framework for recognizing civic and cultural uses that may already be fulfilling this role in your neighborhood.

civic uses

- [ ] library
- [ ] bookmobile
- [ ] postal services
- [ ] school
- [ ] college or university
- [ ] public park
- [ ] community/recreation/senior center
- [ ] daycare facilities
- [ ] religious institution
- [ ] municipal and government buildings
- [ ] community garden

cultural uses

- [ ] historic site (open to the public)
- [ ] museum or gallery
- [ ] auditoriums or performing arts studios
- [ ] classrooms dedicated to arts education
- [ ] outside of school system
- [ ] movie theater
- [ ] live music venue

other

- [ ] retail establishment that fills a civic or cultural role (i.e., the fabric shop that teaches quilting, the barbershop that acts like a community center, the coffee shop that hosts the community bulletin board, etc.)

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implementation toolkit

measure, engage and spark a retail street to vibrancy

No two retail streets are alike, and few are at the same stage of their transition to vibrancy. This implementation toolkit was designed to aid districts that are emerging as well as established environments.

The attributes of a vibrant street, introduced on Page 22, are organized in terms of a flowchart. In order to proceed to the second step, you must fulfill the requirements of the first step, and so on.

As each attribute is discussed in the toolkit, questions are posed to help you evaluate if your retail street does indeed possess this quality from a retail standpoint. Recommendations to improve your district's ability to achieve that attribute are given on the following page.

"Moving forward" is a section dedicated to various Washington, DC government agencies and non-profit organizations, recommending ways that the retail districts could be further supported through citywide initiatives.

Now, get started and good luck!

Coming together is a beginning. Keeping together is progress. Working together is success.
Henry Ford

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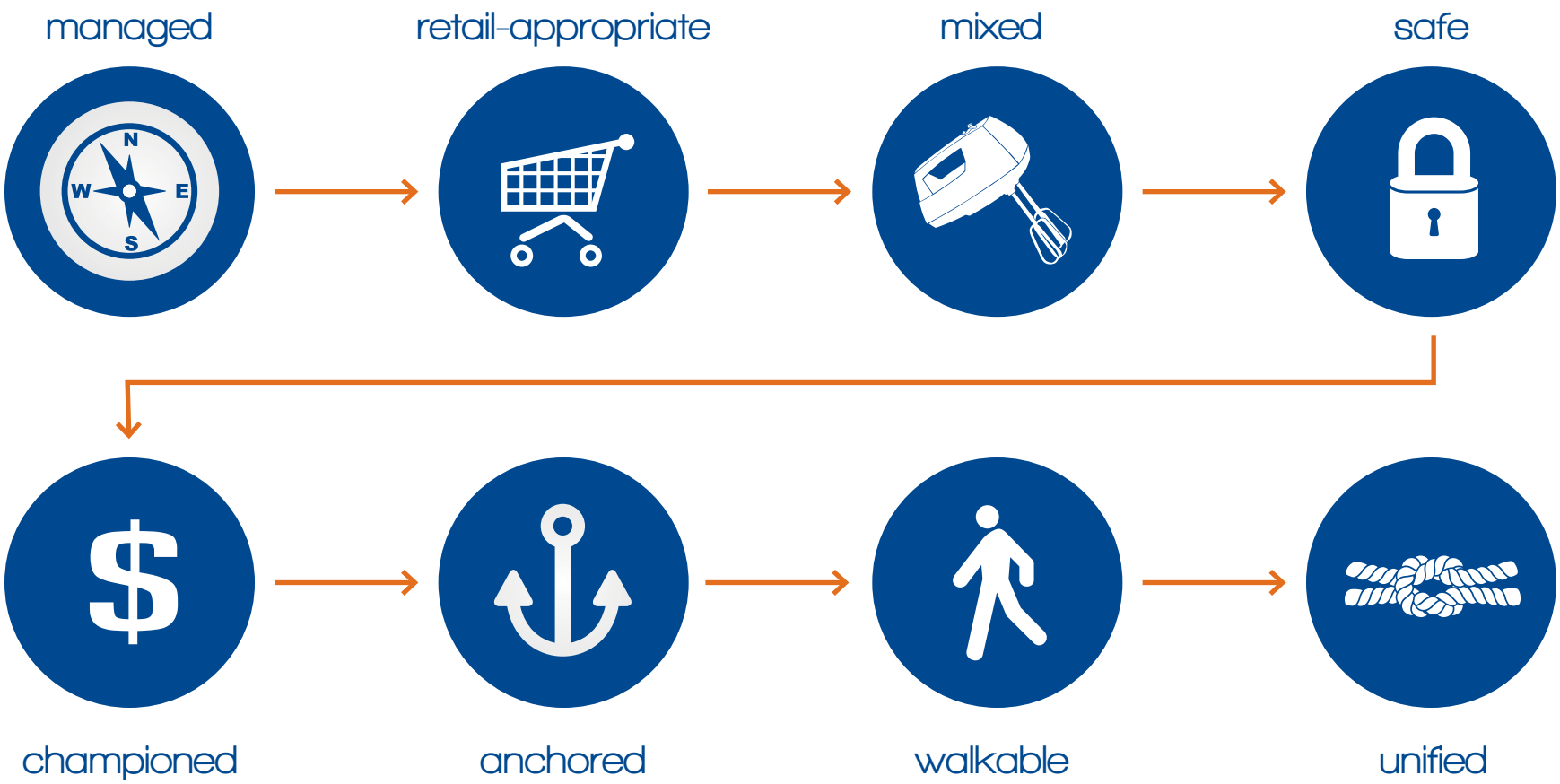
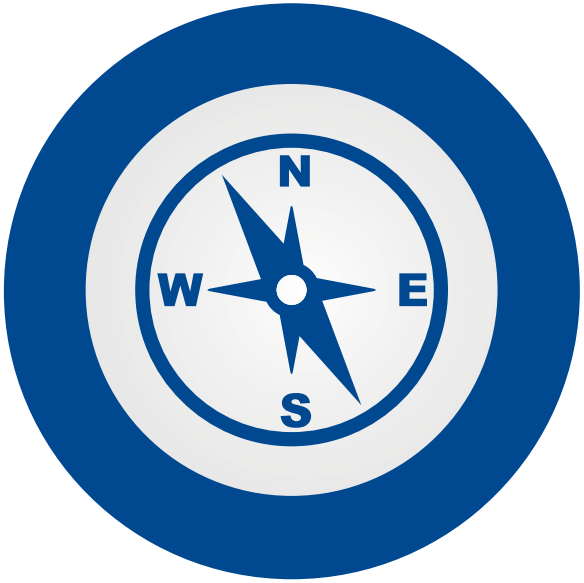
Implementation Process Flowchart





item 1: is your street managed?

- Does your neighborhood have an active business improvement district (BID), Main Street Program, merchants' association, non-profit organization, or assigned committee on a community or civic association that oversees business activity in your retail district?
- Is there one firm or individual who owns a majority of the parcels included in your retail district?

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item 1: is your street managed?

yes! Consider a self-evaluation of the activities of your managing organization. To be most effective, a retail district should be guided to:

- Establish annual goals for the community to work together to achieve.
- Encourage its retailers to maintain similar hours.
- Pursue combined marketing opportunities.
- Assign a contact person to represent the organization. Distribute this persons' name and information to your community association, Advisory Neighborhood Commission (ANC), Police District and Police Service Area (PSA), Neighborhood Planner for your Ward, and your City Council representative's office. Information about how to reach each of these entities can be found at www.dc.gov by selecting the "Where You Live" tab.

If you do not have non-profit status, contact the Department of Consumer and Regulatory Affairs for additional information – (202) 442-4400 or dcra@dc.gov.

Proceed to Item #2.

moving forward Investigate the applicability of micro district and/or maintenance area district programs for DC's small to medium-sized retail districts. (Office of Planning)

Create a standard flyer that can be used by organizing groups to make a first approach to surrounding businesses. This document should bullet point some essential reasons for forming a team or association, as well as an area to list a time and place for interested parties to meet. (Department of Small and Local Business Development)

no... Talk to other retailers in your neighborhood about their interest in forming a team, no matter how informal. Even though these businesses might technically "compete" against each other, you can attract more customers if you act together to achieve goals that will benefit everyone.

A generally accepted guideline for establishing a business improvement district (BID) is a minimum of 300 businesses participating within one geographical area. Successful micro districts are typically between 40 and 100 businesses. Fewer than 40 businesses should pursue one of the alternatives listed below.

If your retail district has a core group of interested members but not enough to pursue BID designation, investigate the following options:

- Application to the DC Main Streets program. Read the online chapter, "Getting Started," from *Revitalizing Main Street: A practitioner's guide to commercial district revitalization*. (http://www.preservationnation.org/main-street/resources/public/RMS_Getting-Started.pdf). Contact DC's Department of Small and Local Business Development at (202) 727-3900 or dslbd@dc.gov for more information; or
- Form a merchants' association. Read the *Stating a Nonprofit* chapter from the Doing Business in DC guide from the Washington, DC Economic Partnership (http://www.wdcep.org/business-in-dc/starting-a-nonprofit/). Contact the Department of Consumer and Regulatory Affairs about pursuing non-profit status for your organization; or
- If available, join your community or civic association. Request the creation of a business sub-committee if one does not already exist.

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item 2: is your street retail-appropriate?

Review your commercial core's retail inventory table (Page 50).

- Are fewer than 10 percent of the storefronts in your retail district occupied by non-retail uses (offices, churches, non-profit headquarters, etc.)?
- Is your district's retail vacancy rate lower than 20 percent?

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item 2: is your street retail-appropriate?

yes! Proceed to Item #3.

moving forward

To further assist DC's retail districts, the following initiatives have been proposed to the corresponding responsible parties:

Create a neighborhood retail broker training program and offer on-going technical assistance to merchant association members who successfully complete it. (Washington DC Economic Partnership)

Revise and update the document, *Thrive: A Guide to Storefront Design in the District of Columbia* (2002). Include section on storefront considerations for non-retail establishments in retail districts. (Office of Planning)

Consider measures similar to New York City's Retail Continuity regulations to prevent banking establishments from occupying key retail corners in competitive retail districts. (Office of Planning)

no... Create a list of names and addresses for property owners of vacant retail-appropriate space.

As permitted, undertake an initiative to enliven the vacant space in your retail district. Possible options include a window mural program by local art students, a display of historic photographs from the neighborhood, or a storefront clean-up afternoon. Although it is critical to receive property owner permission in advance of any such activity, improving the appearance of maintained storefront in the neighborhood enhances the overall retail environment of the street.

Visit www.wdcep.org to determine if a profile has been created for your neighborhood. If so, distribute this information to the members of your organization and reach out to businesses you would like to see in your retail district.

Provide the Washington, DC Economic Partnership with your vacancy information for inclusion in their Retail Site Search database. (www.wdcep.org)

Meet with the owner's of non-retail business in retail-appropriate locations in your district.

- Explain the purpose of your retail district's association and how important their business is to maintaining activity and continuity on the sidewalk.
- Ask them to participate in your organization.
- Discuss various ways that a non-retail business can present a "retail face" to the street. A well-maintained storefront, a colorful awning, and window displays can make an impact for even non-retail establishments and maintain the visual interest of passersby.

If appropriate, contact DC Office of Housing and Community Development, (202) 442-7200 or dhcd@dc.gov, about pursuing a grant or technical assistance for retail and non-retail storefronts in your district.

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item 3: is your street's retail mixed?

Request your retail district's demographic profile from www.wdcedp.com. Use an address near the center of your district to serve as a focal point for the following information:

- Population and median household income at 1/4, 1/2 and 1 mile radii.
- Daytime population at 1/4 and 1/2 mile radii.
- Education levels at 1/4/, 1/2, and 1 mile radii.

Refer to the conclusions of your neighborhood's Retail Mix Diagnostic Assessment on Page 52-54.

- Does the existing mix of tenants in your retail district correspond to your neighborhood's retail "strengths?"

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item 3: is your street's retail mixed?

yes! Proceed to Item #4.

moving forward

Pursue a program similar to Boston's Neighborhood Restaurant Initiative to encourage sit-down establishments in neighborhoods that can support one, but have difficulty attracting one. (Department of Small and Local Business Development)

no... Create a list of commercial brokers that routinely lease office or retail space in your community. Contact a few to learn more about why your neighborhood may not be appealing to certain categories of tenants. Make a list of frequently mentioned issues and brainstorm with your organization or team to see if these obstacles (real or perceived) can be easily addressed.

Consider the impact of your organization's positions on planning and zoning issues for your neighborhood. Because retail districts need customers, additional residential and office density may be necessary to establish a market for the types of retail the community desires.

Work with your community or civic organization, if one exists. If one does not, consider holding a special forum with the assistance of your ANC, the Office of Planning and the Department of Small and Local Business Development. As a neighborhood, discuss which compromises everyone is willing to make to have a vibrant retail district and what consequences are unacceptable. Begin to work as a unit to understand how your community's long-term success is dependent upon cooperation between the residents and retailers.

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item 4: does your street feel safe?

View your retail district's crime data at the Metropolitan Police Department's crimemap.dc.gov.

- Is there a low crime rate in your retail district?
- Are there residences near your retail district or another type of activity that encourages daytime, evening, and weekend occupancy of your street?
- Does your street have pedestrian level lighting that illuminates the sidewalk?
- Does your principal retail street feel safe to local residents? What about visitors?

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item 4: does your street feel safe?

yes! Proceed to Item #5.

moving forward

Consider an initiative that would assign off-duty members of the police force to uniformed security detail in retail districts prone to criminal activity. If pursued in conjunction with a Micro Districts approach, study distributing the costs of a security unit among many smaller retail areas and rotating their assignments based on need. (Metropolitan Police Department)

no... Establish if the safety concerns in your area are real or perceived. If they are real, arrange a meeting between your organization and your PSA representative to discuss possible remedies.

If your retail district is only perceived to be unsafe, walk through your retail district, taking note of the following issues:

- Any non-functioning streetlamps
- Poorly maintained public trash receptacles or benches
- Grass or weeds in public areas that need mowing
- Sidewalks in disrepair
- Graffiti
- Similar items to those listed above

Report these incidents to the DC Government's 311 service, available by telephone or online at www.dc.gov.

Ask members of your organization to consider leaving their interior and possibly exterior storefront lights on in the evening to supplement the streetlights after closing.

Remind property owners and retailers of their responsibility to remove litter, leaves, and snow from the sidewalks in front of their businesses.

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item 5: is your street championed?

- Is there a developer that is planning or has undertaken a large-scale project in your neighborhood?
- Has a sizable public or private initiative been undertaken to enhance your retail district (i.e. power lines undergrounded, streetscape program, mature tree planting, sidewalk paving, public art, or similar)?

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item 5: is your street championed?

yes! Proceed to Item #6.

moving forward

Evaluate the benefit of employing a mapping and data collection software such as ZoomProspector to direct developers to possible commercial and industrial sites around DC. (Deputy Mayor's Office for Planning and Economic Development and Office of the Chief Technology Officer)

no... Investigate your neighborhood. Is there a vacant or underused parcel over ½ acre in size near the retail district?

Participate in public meetings. The Department of Transportation (DDOT) and the Office of Planning are two DC agencies that regularly conduct neighborhood meetings. Determine your organizations "Investment Wish-List" prior to these forums and represent your association to the government agencies and to your City Council member.

Investigate the cost to make simple changes to your retail district that might require more sweat equity than funds. Possible initiatives include flower bed plantings, holiday decorations, and bi-annual storefront painting.

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item 6: is your street anchored?

Review the Civic and Cultural Audit of your retail district (Page 55).

- Is there a sizable civic or cultural facility active in your retail district?

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item 6: is your street anchored?

yes! Proceed to Item #7.

moving forward

Investigate the opportuntiy for a partnership between a citywide retail streets organization and Cultural Tourism DC to create yet another avenue to extend the reach of arts activities further into the infrastructure of the neighborhoods. (Cultural Tourism DC)

Investigate which retail streets throughout DC might benefit from the Village Post Office program now offered by the United States Postal Service. (Office of Planning)

no... As your association gains traction, consider partnering with another group to host a community event. Invite a local collection of artists (dance, music, painting, etc.) to participate as a featured element. In doing so, you will increase your neighborhood's exposure to cultural organizations.

Look around your neighborhood and think about potential civic and cultural spaces differently. Remember, at previous points in our nation's history, the most important civic spaces were created by street corners and soapboxes.

Consider membership in Cultural Tourism DC (currently $150 for community development organizations and neighborhood associations).

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item 7: is your street walkable?

- Are the sidewalks in your retail district wider than six feet on average?
- Have Food & Beverage establishments created outdoor cafes in your district?
- Do the number and spacing of trees and streetlights provide adequate shade and lighting respectively?

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item 7: is your street walkable?

yes! Proceed to Item #8.

moving forward

Institute an annual pedestrian and bicycle counting program similar to traffic counting methodology. (Department of Transportation)

Introduce certified pedestrian and bicycle counts into Neighborhood Profile information (Washington, DC Economic Partnership)

no... Observe pedestrian and bicycle activity in your neighborhood for one hour during the day and again in the evening. Does the walking and biking experience appear to be pleasant or inconvenient?

Assist restaurants and cafes in obtaining sidewalk café permits, as desired. The addition of even small tables to a sidewalk environment enlives the space and can increase the "walkability" of the street, even when not in active use.

If your sidewalks are made uncomfortable by the speed of passing cars, approach a radar speed signage company such as Information Display Company. In addition to providing a product proven effective in reducing vehicle speeds, this firm also provides assistance in preparing grant applications to fund installation.

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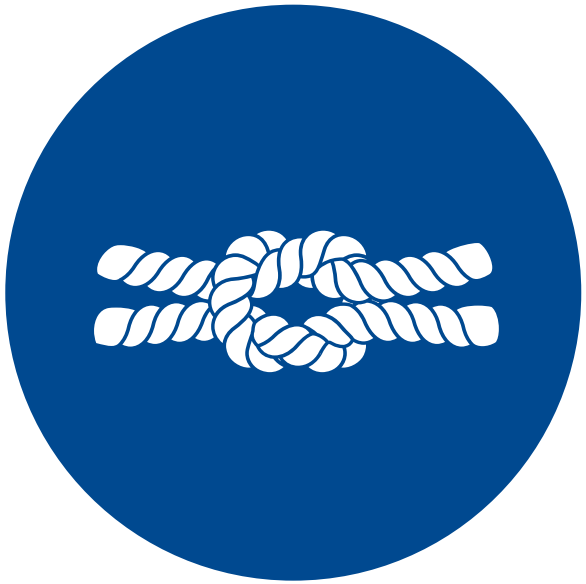

item 8: is your street unified?

- Is your retail district located in an historic district (http://propertyquest.dc.gov/)?
- Has your neighborhood initiated a branding strategy for your retail district?
- Are your district's retail storefronts in good condition and well-maintained?

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item 8: is your street unified?

yes! Congratulations! You have put all of the pieces in place to form a solid foundation for a vibrant retail street!

moving forward

Like New York, Chicago, and San Diego, among others, evaluate the potential to offer guidance, oversight, financial management, and administrative resources to DC's small retail districts, collectively. Within this forum, retail street associations should be provided with opportunities, via web and in person, to collaborate. (BID Council/ Department of Small and Local Business Development)

no... Visit the website for the DC Historic Preservation Office (www.planning.dc.gov). If your retail district has been studied as a potential historic district or contains historic properties, the HPO staff will know. Landowners must agree before historic designation is pursued, so simply asking some questions will do no harm.

Regardless of your retail district's historic designation, find unifying concepts that define your neighborhood. Is it a melting pot? A place for families? An entertainment district? Several blocks of the finest shopping in the District? A place where start-up retailers can afford the rent? With ingenuity, each of these ideas can be built upon to tell the retail marketplace your story.

Creating a branding strategy for your neighborhood can be as easy as finding a talented art student to develop a logo and as extensive as hiring professional graphic artists. Start by asking your group to define what your retail district and/ or neighborhood is about in just a few basic words. Think about how you could reflect agreed upon themes in your signage, marketing materials, and even public art projects.

Apply to the Department of Transportation's Urban Forestry program to have your street trees evaluated. If replacement is necessary, make every effort to submit requests for new trees prior to the June 15th deadline for planting the following spring.

Both the Department of Small and Local Business Development and the Department of Housing and Community Development offer storefront improvement programs. Contact these agencies to see how they might add a fresh look to your district.

HOWEVER, do not confuse "unified" with "uniform." A line of retailers with the same awnings, signage types, and color palettes blur together for the passing customer and do not attract the necessary attention.

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technical appendix – table one: general observations

	year est.	avg. sidewalk width (ft.)	no. of blocks in length	open public space	recognizable streetscape design program	located within a BID	located within a merchants' assoc.	supported by a non-profit org	located within a historic district	underground electrical & phone lines
Small-Scale Shopping Street										
Carytown, Richmond, VA	1938	10	8	No	No	No	Carytown Merchants' Association	No	Virginia Dept of Historic Resources	Yes
North Market Street, Frederick, MD	1976	10	8	No	No	No	No	Downtown Frederick Partnership	Yes	Yes
Main Street, Manayunk, PA	1854	10	9	No	No	No	Business Association of Manayunk	Manayunk Development Corporation	Yes	Yes
Charles Street, Boston, MA	1795	8	6	Boston Common & Boston Public Garden	Yes	No	Beacon Hill Business Association	No	National Register of Historic Places; National Historic Landmark (Beacon Hill)	Yes
Oak Street, Chicago, IL	1882	17	2	No	Yes	No	No	Oak Street Council	National Register of Historic Places; National Historic District (Gold Coast Historic District)	Yes
Madison Park, Seattle, WA	Early 20th c.	8	4	Madison Park	No	No	Madison Park Business Association	No	No	Yes
Bethesda Row, Bethesda, MD	1996	14	6	No	Yes	No	No	Bethesda Urban Partnership	No	Yes
East Davis Street, Culpeper, VA	1759	9	2	No	No	No	No	Culpeper Renaissance Inc.	Culpeper Historic District	Yes
O'Donnell Square, Baltimore, MD	Late 19th c.	9	7	O'Donnell Square	No	No	Canton Community Association	No	Canton Historic District	Yes
Atlantic Avenue, Brooklyn, NY	1930s	14	11	No	No	Proposed	Atlantic Avenue Betterment Association	Atlantic Avenue Local Development Corp.	Cobble Hill Historic District & Brooklyn Heights Historic District	Yes
Destination Retail Streets										
Walnut Street, Philadelphia, PA	1850s	15	4	Rittenhouse Square	No	City Center District	No	Central Philadelphia Development Corp., Rittenhouse Row	City Center West Commercial Historic District	Yes
Newbury Street, Boston, MA	1905	10	8	Boston Public Garden	No	No	Newbury Street League	Back Bay Association	National Register of Historic Places	Yes
North Michigan Avenue, Chicago, IL	1920	20	12	Water Tower Plaza	Yes	No	Greater N. Michigan Avenue Association	No	Old Chicago Water Tower District	Yes
Third Street Promenade, Santa Monica, CA	1989	18	3	No	Yes	Downtown Santa Monica Based Assessment District	No	Managed by Bayside District Corp. (private-public)	No	Yes
Champs-Elysees, Paris, France	Late 18th c.	40	7	Place de la Concorde	Yes	No	Comite Champs-Elysees	No	Yes	Yes
Omotesando, Tokyo	1920	18	10	Yoyogi Park	Yes	No	Harajuku Omotesanto Keyakikai	No	No	Yes

	site conditions	residential population within 1/2 mile	households within 1/2 mile	median HH income within 1/2 mile	daytime population within 1/4 mile	no. of city tourists	average retail rent	one, several or various landowners?	retail vacancy rate
Small-Scale Shopping Street									
Carytown, Richmond, VA	Suburban	5,902	3,228	$41,416	3,883	5,700,000	$13	Various	12.9%
North Market Street, Frederick, MD	Suburban	6,042	2,751	$47,539	5,236	1,400,000	$14	Various	7%
Main Street, Manayunk, PA	Suburban	7,782	3,408	$52,887	1,872	n/a	$22	Various	5%
Charles Street, Boston, MA	Urban	17,259	9,870	$85,267	3,485	12,000,000	$50	Various	2%
Oak Street, Chicago, IL	Urban	37,972	25,388	$66,334	18,560	45,580,000	$225	Various	8.9%
Madison Park, Seattle, WA	Urban	3,990	2,209	$87,309	932	8,800,000	$22	Various	4%
Bethesda Row, Bethesda, MD	Suburban	7,979	4,366	$87,425	13,310	n/a	$68	One	4%
East Davis Street, Culpeper, VA	Rural	3,012	1,237	$45,133	2,552	n/a	$13	Various	15%
O'Donnell Square, Baltimore, MD	Urban	10,152	5,058	$51,619	1,320	17,000,000	$21	Various	3%
Atlantic Avenue, Brooklyn, NY	Urban	35,502	15,715	$114,915	14,740	48,700,000	$62	Various	5%
Destination Retail Streets									
Walnut Street, Philadelphia, PA	Urban	28,003	18,445	$43,250	25,264	30,320,000	$110	Various	8%
Newbury Street, Boston, MA	Urban	21,144	12,219	$94,535	34,894	12,000,000	$145	Various	5.3%
North Michigan Avenue, Chicago, IL	Urban	34,873	23,414	$71,972	36,704	45,580,000	$83.26	Various	3.6%
Third Street Promenade, Santa Monica, CA	Suburban	7,271	4,736	$43,488	9,652	6,300,000	$165	Various	2%
Champs-Elysees, Paris, France	Urban	34,978				78,000,000	$793	Various	2%
Omotesando, Tokyo	Urban	24,507			65,021	16,700,000	$330	Various	4.9%

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	primary customer group	retail mix			ratio of local/regional to national tenants	includes a civic anchor?	includes a cultural anchor?
		NG&S	F&B	GAFO			
Small-Scale Shopping Street							
Carytown, Richmond, VA	Regional Residents	40%	35%	25%	95:5	No	Historic Byrd Theater
North Market Street, Frederick, MD	Regional Residents	5%	60%	35%	90:10	Frederick County Public Library	Weinberg Center for the Performing Arts
Main Street, Manayunk, PA	Regional Residents	25%	30%	45%	in transition	No	Movie Theater
Charles Street, Boston, MA	Tourists	25%	30%	45%	85:15	Boston Common/ U.S. Post Office	No
Oak Street, Chicago, IL	Regional Residents	4%	3%	93%	65:35	No	No (Esquire Theater vacant)
Madison Park, Seattle, WA	Neighborhood Residents	45%	55%	10%	95:5	Madison Park	No
Bethesda Row, Bethesda, MD	Regional Residents	10%	55%	35%	75:25	No	Landmark Theater
East Davis Street, Culpeper, VA	Neighborhood Residents	5%	75%	15%	100:0	Museum of Culpeper History, Burgadine House	State Theatre (under renovation)
O'Donnell Square, Baltimore, MD	Neighborhood Residents	10%	85%	5%	97:3	Library and Firestation	Churches
Atlantic Avenue, Brooklyn, NY	Regional Residents	20%	60%	20%	75:25	YMCA, Post Office	Brooklyn Academy of Music, proposed Basketball Arena
Destination Retail Streets							
Walnut Street, Philadelphia, PA	City Residents and Workforce	8%	20%	73%	25:75	Rittenhouse Square	Walnut Street Theater
Newbury Street, Boston, MA	City Residents and Workforce	30%	15%	55%	90:10	Public Garden	Hynes Convention Center
North Michigan Avenue, Chicago, IL	City Residents and Workforce	35%	10%	55%	10:90	Old Water Tower/ City Gallery	Lookingglass Theatre Company
Third Street Promenade, Santa Monica, CA	Tourists	0%	15%	85%	20:80		Movie Theaters (3)
Champs-Elysees, Paris, France	Tourists	2%	20%	78%	20:80	Arc de Triomphe	Publicis Champs-Elysees, UCG Georges V
Omotesando, Tokyo	City Residents and Workforce	20%	26%	54%	20:75	Meiji Shrine, Ota Memorial Museum	

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	average daily traffic count	walkscore	estimated vehicles per HH within 1/4 mile	no. of bus routes	transit?	public parking facilities?
Small-Scale Shopping Street						
Carytown, Richmond, VA	16,000	89	1.31	1	Yes	Yes
North Market Street, Frederick, MD	10,500	94	1.44	3	No	Yes (1)
Main Street, Manayunk, PA	15,000	82	1.25	2	Yes	Yes (3)
Charles Street, Boston, MA	12,000	95	0.7	0	Yes	No
Oak Street, Chicago, IL	16,000	97	0.77	0	No	No
Madison Park, Seattle, WA	14,800	94	1.49	1	No	No
Bethesda Row, Bethesda, MD	10,000	94	1.1	1	Yes	Yes (2)
East Davis Street, Culpeper, VA	4,000	89	1.86	0	Yes	Yes (3)
O'Donnell Square, Baltimore, MD	9,500	88	1.28	0	No	No
Atlantic Avenue, Brooklyn, NY	22,000	94	0.37	4	Yes	Yes (3)
Destination Retail Streets						
Walnut Street, Philadelphia, PA	16,000	98	0.43	4	No	Yes (3)
Newbury Street, Boston, MA	4,000	100	0.8	0	Yes	Yes (3)
North Michigan Avenue, Chicago, IL	42,000	98	0.69	16	No	Yes (4)
Third Street Promenade, Santa Monica, CA	0	100	1	0	No	Yes (9)
Champs-Elysees, Paris, France	75,000	78		1	Yes	Yes (1)
Omotesando, Tokyo	80,000	75		2	Yes	Yes (1)

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