

**Van Ness Vision Framework
Community Workshop**

District of Columbia
Office of Planning



VANNESS

COMMERCIAL DISTRICT PROFILE

JANUARY 31, 2015

PURPOSE

This Profile of the Van Ness commercial district includes 1) an analysis of existing conditions; 2) issues and constraints of the physical environment and retail conditions; and 3) opportunities to strengthen the neighborhood's identity. The purpose of the Profile is to inform and support stakeholders in discussions at the Van Ness Community Workshop on January 31, 2015, and to assist in shaping the Van Ness Vision Framework. The Van Ness Vision Framework will be the culmination of the DC Office of Planning's current planning initiative in Van Ness and serve as an action plan for realizing a vibrant and successful Van Ness commercial district.

TOPIC AREAS

The Van Ness Vision Framework, will take a comprehensive view of the Public Space, Retail Environment, Sustainability, and Development Opportunities in order to develop a stronger and healthier commercial district.

PUBLIC SPACE AND STREETScape

By understanding the constraints of the built environment and the opportunities afforded by generous sidewalks and available space, the Van Ness Vision Framework can help further develop the streetscape into an attractive and memorable pedestrian environment.

SUSTAINABILITY

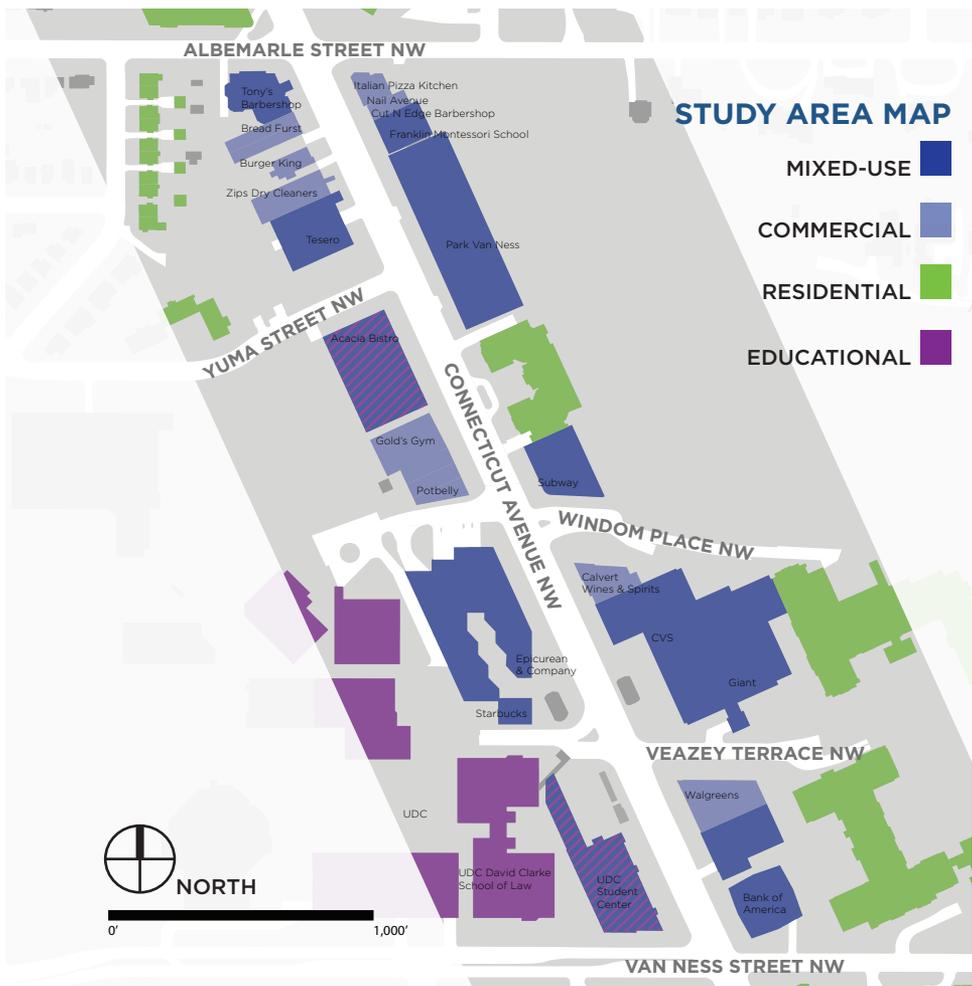
Building on the goals of Sustainable DC and high performance streetscapes, the Van Ness Vision Framework will provide recommendations for applying Green Infrastructure techniques to improve the environmental performance of the corridor. Sustainability can also serve as a foundation around which to build a district identity.

RETAIL ENVIRONMENT

Through an understanding of the market supply and demand, and the retail spaces that exist, the Van Ness Vision Framework can provide guidance for the attraction and retention of high quality retail tenants. The Framework will provide a series of recommendations focused on transforming the Van Ness corridor into a truly vibrant street.

DEVELOPMENT OPPORTUNITIES

The Van Ness Vision Framework will identify key redevelopment sites along the corridor to highlight opportunities where development activity can be undertaken to improve the condition of the streetscape, retail quality, and livability of the corridor.



The Van Ness Vision Framework Study Area includes properties fronting Connecticut Avenue NW from Van Ness Street at the south to Albemarle Street at the north.

Connecticut Avenue is one of the District's most important Avenues, extending from the White House and into Maryland. Along its path, Connecticut Avenue changes its shape, size and identity numerous times as it travels through a variety of neighborhoods, at times a vehicular-oriented artery focused on moving traffic to a retail-oriented main street to an elegant tree-lined, residential avenue. Through Van Ness, Connecticut Avenue is focused on moving traffic north and south during the morning and evening rush, moving pedestrians between different forms of public transportation and providing a variety of uses in its ground floor spaces.

The corridor is a hub for commercial activity supported by a variety of surrounding uses including: education (the University of the District of Columbia & Howard University Law School), multifamily housing, single family housing and diplomatic. The study area is focused on the properties that front Connecticut Avenue and the public spaces (and opportunities for public space) that exist along this length - streetscape, sidewalk, cross streets and plazas.



CONNECTICUT AVENUE NW Connecticut Avenue provides Van Ness with a high profile and excellent visibility. The Vision Framework will seek to improve the conditions of the retail environment and the public space within the constraints of an arterial roadway dominated by vehicular traffic.



RETAIL CONDITION The quality of retail space in Van Ness varies greatly from drive-thru restaurants to arcaded shops to traditional “main street” retail space. Only one-fifth of the space, however, would be viewed by potential tenants as “high-quality.” As the quality of space is improved, there will be opportunities to attract a wider range of retailers including higher end stores.



PUBLIC SPACE Several factors of high-quality public space are present along Connecticut Avenue like mature trees and wide sidewalks. However, public spaces are inconsistent, poorly organized or simply not designed for pedestrian comfort. The Vision Framework will include several recommendations for using these assets to deliver a vibrant street with a neighborhood identity. The Office of Planning is conducting a complementary Green Infrastructure Study in Van Ness that will build on the Van Ness Vision Framework to guide opportunities for paving removal.



1890-1892: Connecticut Avenue and streetcar line extend through Van Ness.



1920s: Apartment construction boom along Connecticut Avenue.



1901-1903: The National Bureau of Standards, Carnegie Institution of Washington Geophysical Lab, and Fernwood Heights (residential subdivision) are constructed.



1935: Streetcar service through Van Ness discontinued.



1981: Metro station opens.



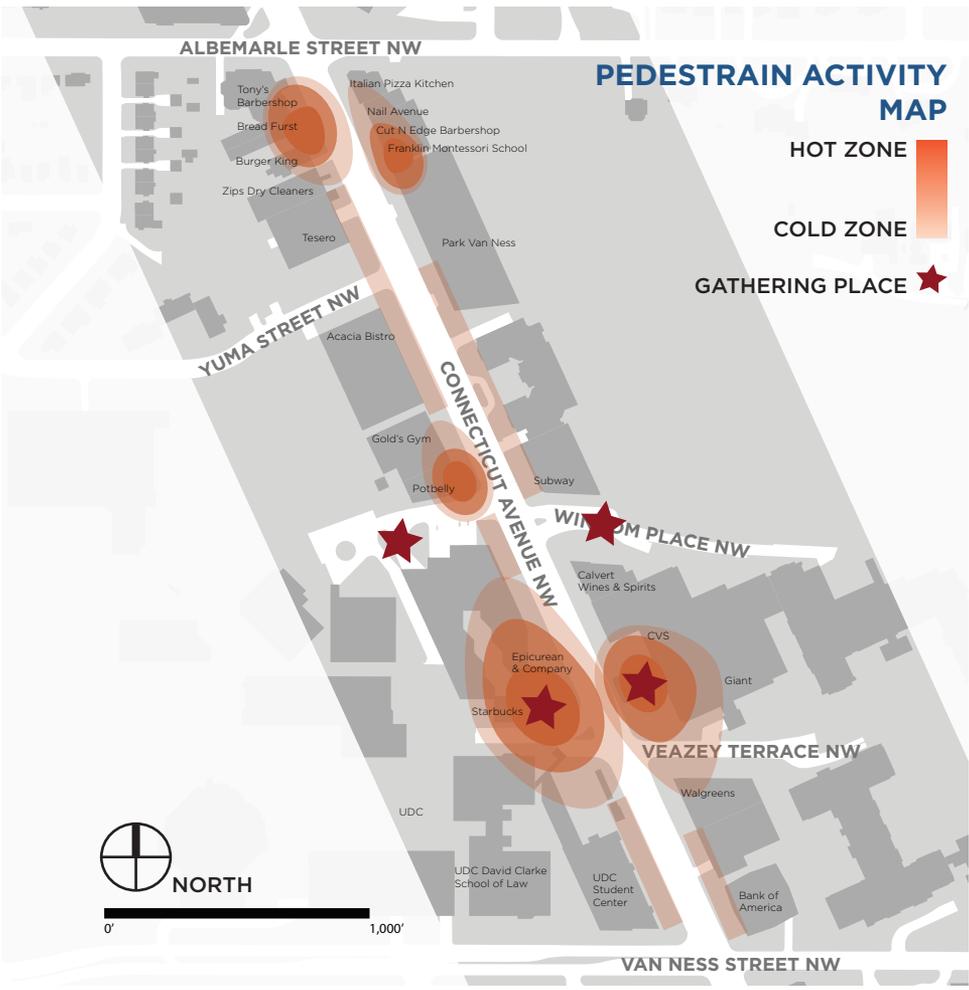
1965-1985: Commercial and institutional construction boom, including the Intelsat building, UDC, and Van Ness Center (Giant building).



2013 : Van Ness Square (former site of the indoor Ice Palace) is demolished to make way for apartments and retail space at Park Van Ness.



2015: Van Ness Vision Framework (underway)

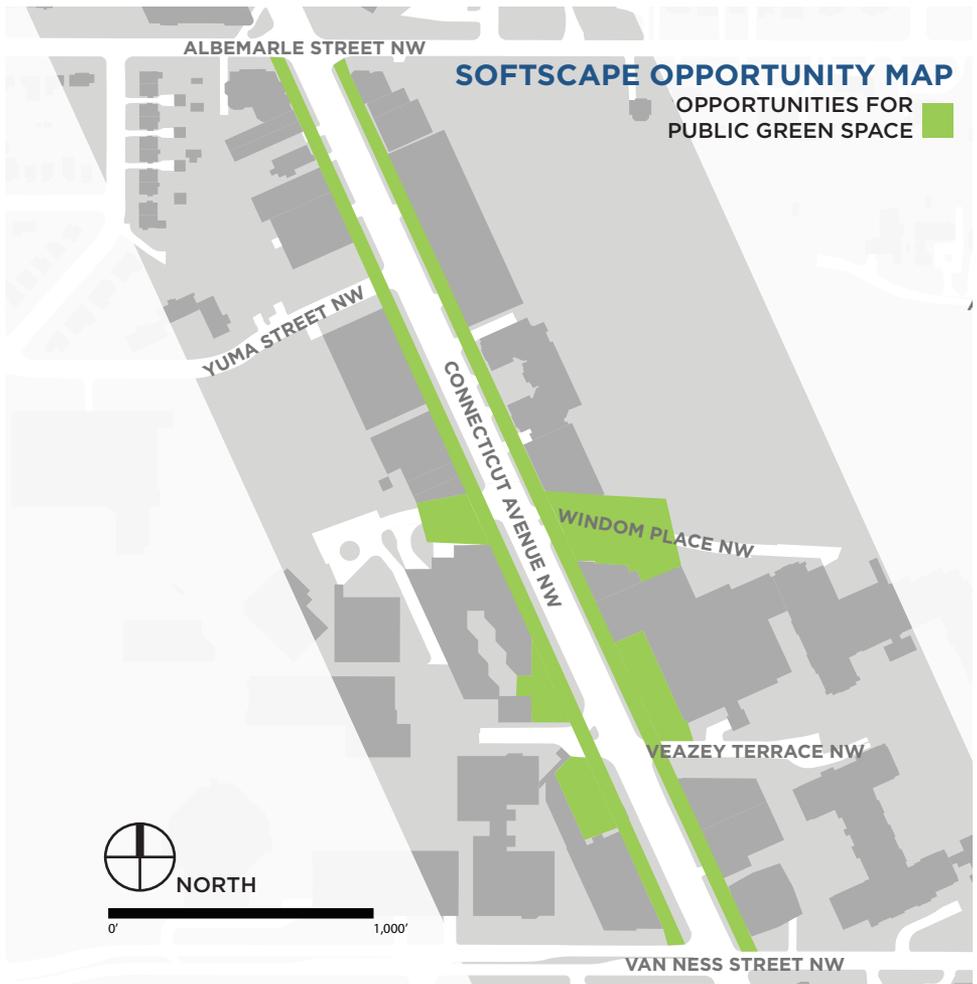


CONNECTICUT AVENUE PUBLIC SPACE

The map above illustrates areas along the corridor where pedestrian gathering takes place. Locations considered to be existing pedestrian "hot zones" are ideal sites to highlight and elevate the activity that is already occurring there.

OPPORTUNITY FOR A LINEAR PARK

Four public space opportunities are highlighted as places where a sizable point of gathering could be envisioned. Converting Connecticut Avenue into a linear park must be a cornerstone of the neighborhood's public space strategy.



LARGE IMPERVIOUS SURFACE + RUNOFF

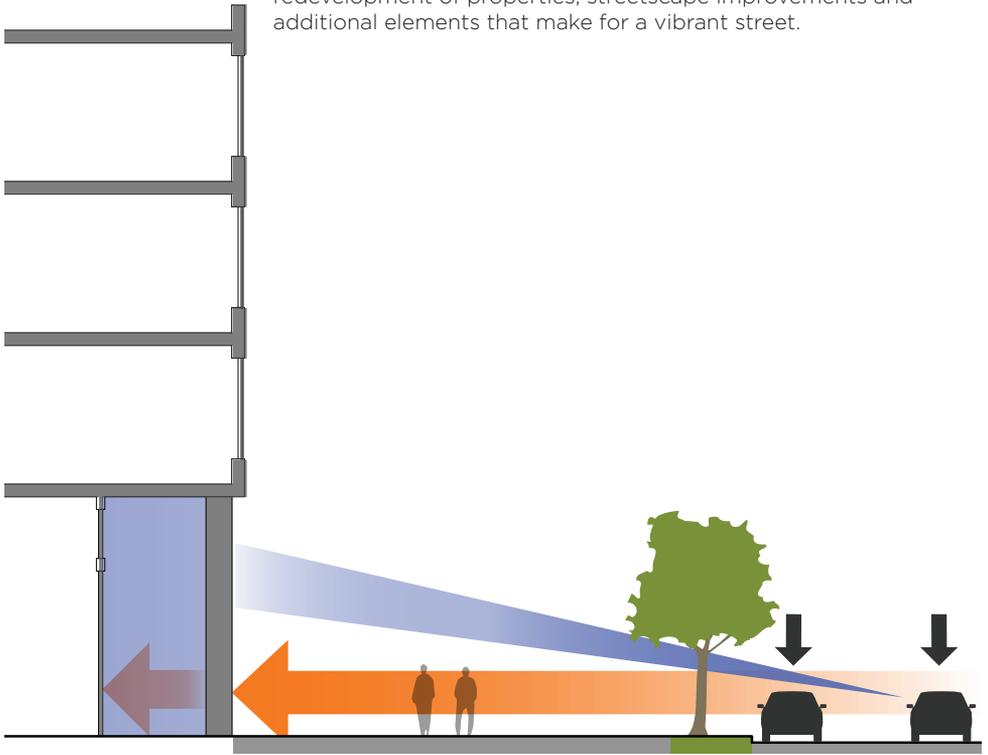
With Rock Creek Park directly to its eastern boundary, the Van Ness commercial district's expansive hardscape (concrete, paving, bricks, and granite) is a startling contrast. Several existing conditions in the Van Ness neighborhood hurt the environmental condition of the Study Area and of Soapstone Creek in particular. Expanses of impervious surface are the main contributor to poor water quality as storm runoff reaches the natural environment.

OPPORTUNITY FOR A GREEN CORRIDOR

The opportunities to incorporate green, comfortable "softscape" elements into this environment is significant. The map above illustrates areas where the impacts of new sustainable infrastructure, reduction in impervious surfaces, creation of open space and other techniques can be used to help reach sustainability goals.

KEY MAP

The section view below is taken across Connecticut Avenue south of Yuma Street, looking toward the north. The section was chosen because it demonstrates many significant issues that work against the creation of a first-rate pedestrian experience and a great immersive environment. There are opportunities to change some of these conditions which can be explored through redevelopment of properties, streetscape improvements and additional elements that make for a vibrant street.

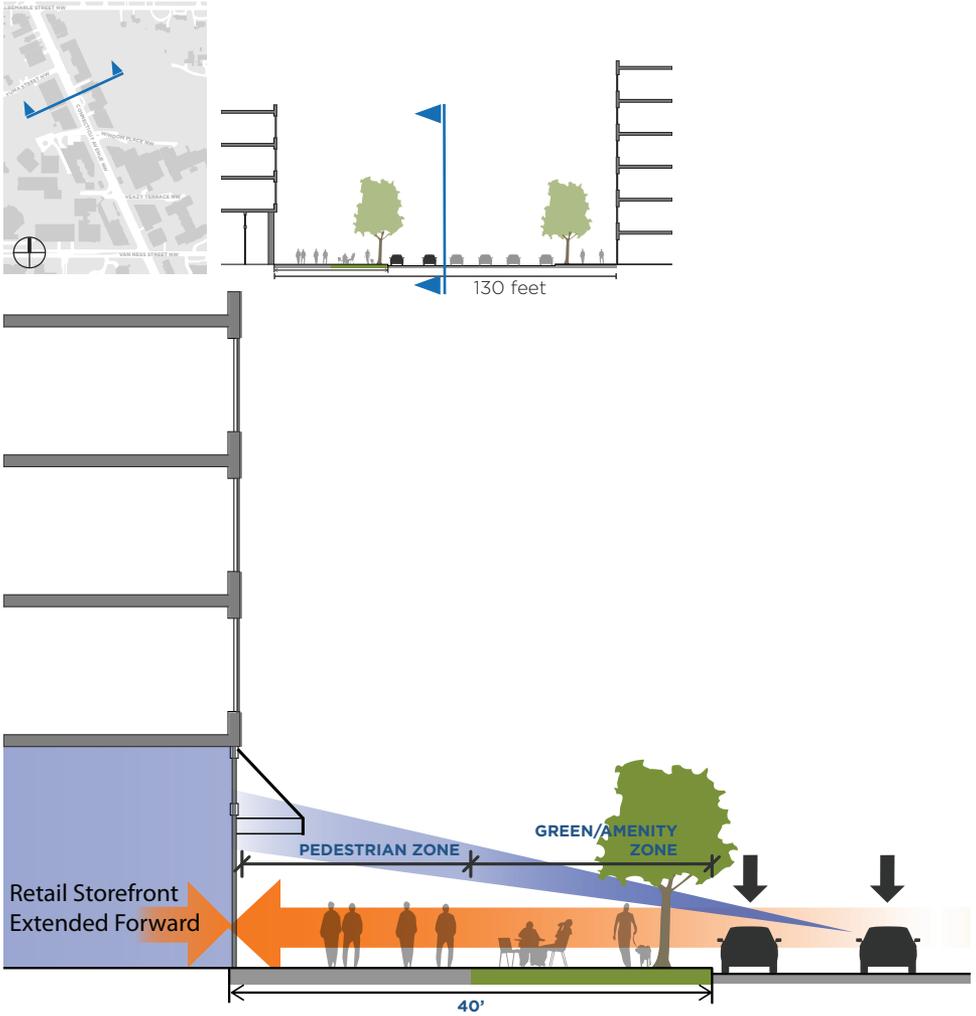


EXISTING CONDITIONS

VISIBILITY A large percentage of ground floor space (retail or other use) is hidden from view by arcaded architecture, immature, low-canopy trees, or is simply too far from the street to be noticed by passing motorists.

DISTANCE The right-of-way width coupled with the high volume traffic pattern make the street difficult to cross. The width of the sidewalk alone in many cases is far wider than the optimal width for a successful pedestrian realm in a retail district. In some instances, the sidewalks on Connecticut Avenue are over 40 feet wide, which is too wide to attract passersby or to give the comforting feeling of an outdoor room.

BUFFERING On-street parking often provides the opportunity for drop-in shopping, and also provides a safety buffer between moving traffic and pedestrians. Connecticut Avenue's reverseable lanes and rush hour parking restrictions do not allow the parking to function as a buffer for pedestrians, because they are not in use when pedestrian traffic is at its peak.



OPPORTUNITIES

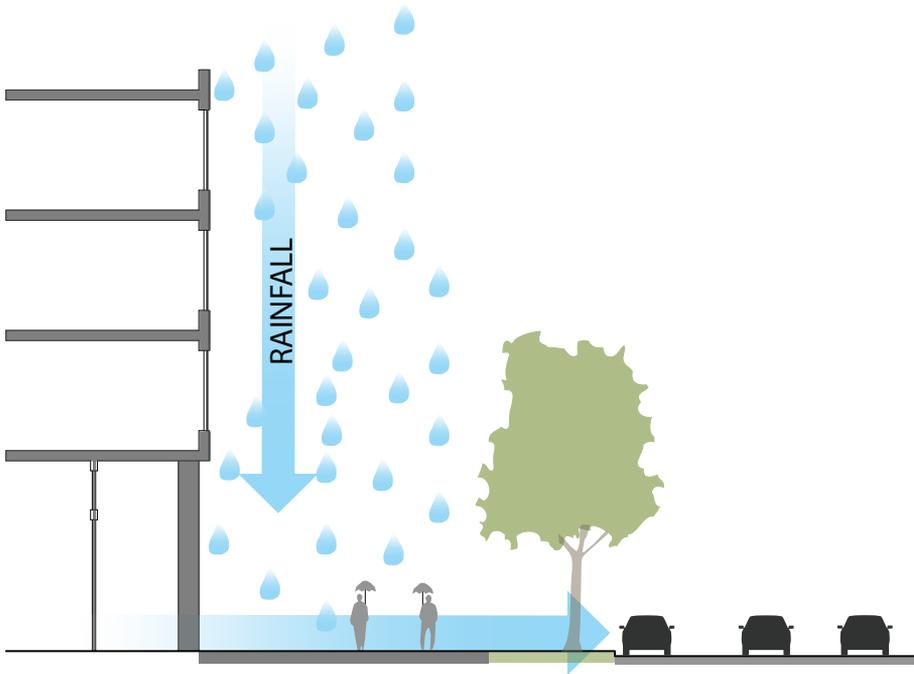
VISIBILITY Visibility across the sidewalk can be improved through enhanced landscape treatment, by “building out” arcades and not building more (in redevelopment scenarios). Awnings or signage positioned closer to the curb should be considered signaling passersby to the existence of the storefronts.

DISTANCE The wide sidewalks could be an advantage to the public space through the use of specific zones - for outdoor seating at cafes, for uninterrupted section of green infrastructure, and for public art and furnishings that will work together to establish a clear and memorable identity for the corridor.

BUFFERING Opportunities exist to redesign the sidewalks to help buffer pedestrians from moving traffic (especially at rush our). Care must be taken to ensure that the buffering works **with** retail space, not as an impediment to retail visibility.

KEY MAP

The section view below is taken across Connecticut Avenue south of Yuma Street, looking toward the north. The section was chosen because it demonstrates many of significant issues that work against the sustainability of the Corridor. Opportunities will be coordinated with the ongoing Van Ness Green Infrastructure Study that seeks to outfit the corridor with more sustainable stormwater management techniques to improve the health and vitality of Van Ness.

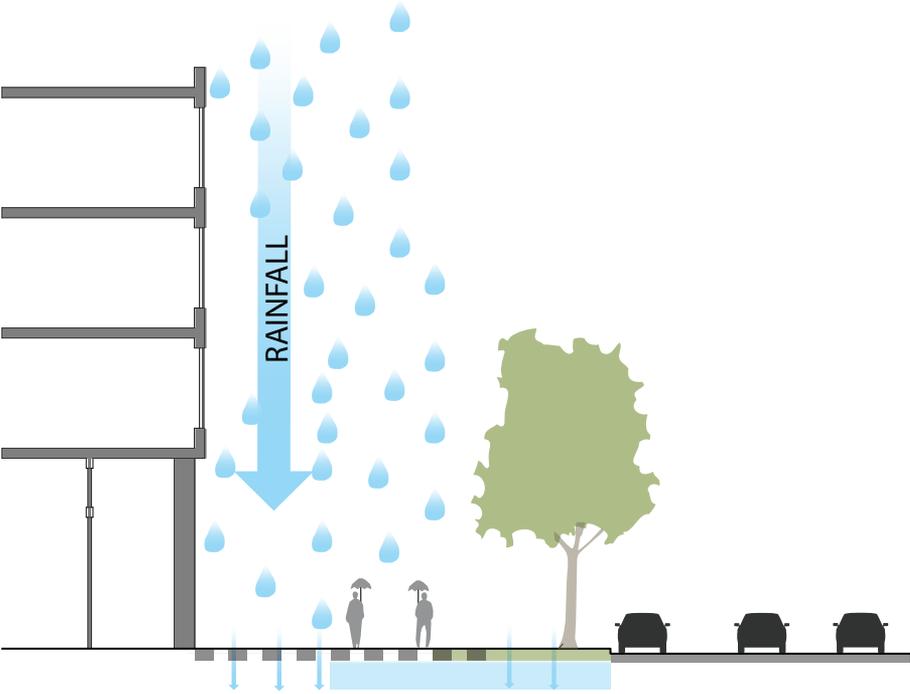
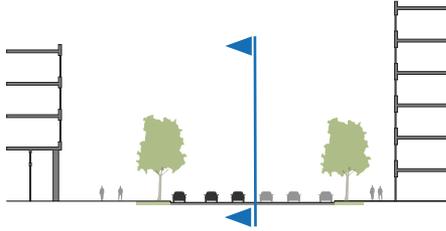


EXISTING CONDITIONS

PLANT MATERIAL There are a number and variety of street trees along the corridor. Tree pits, swales and planters are currently not optimized for water capture or tree and plant health.

PAVING The vast quantities of pavement - specifically impervious pavement - have huge negative implications to both water quantity and quality.

STORMWATER RUNOFF Most water that lands on Connecticut Avenue's sidewalks simply runs across the pavement and into conventional storm drains at the curb. This condition has negative impacts to the ecosystem and is a primary reason for the undertaking of the companion Van Ness Green Infrastructure Study .



OPPORTUNITIES

PLANT MATERIAL The establishment of a more continuous linear park to replace sporadic planters along the full length of the Corridor can help to restore plant life and provide a unique identity for Connecticut Avenue in Van Ness.

PAVING These are opportunities for pavement removal and replacement along the corridor. Porous paving, rain gardens and other techniques can replace the current material and still satisfy the need for hard surfaces along the sidewalks.

STORMWATER RUNOFF The wide sidewalks can accommodate sustainable stormwater management infrastructure. These techniques can help retain water for plant health on the street, and can responsibly retain water to slow the flow of stormwater runoff.

HOW RETAILERS SEE VAN NESS*

Information from Nielson/Claritas Demographihcs

POPULATION 2015 WITHIN TRADE AREA	11,326
HOUSEHOLDS 2015 WITHIN TRADE AREA	3,004
INCOME 2015 MEDIAN	\$91,000
AVERAGE AGE 2015 RESIDENTS	42
EDUCATION % OF RESIDENTS HOLD A MASTER'S OR HIGHER 2015	59%
GROWTH 2015 - 2020 PROJECTED POPULATION GROWTH	+11%
DAYTIME POPULATION NUMBER OF EMPLOYEES 2015	4,178
STUDENT POPULATION 2014 ENROLLED AT UDC (Full Time Equivalent)	3,638
METRO RIDERSHIP 2014 AVG. WEEKDAY PASSENGER BOARDINGS	6,500+
METROBUS RIDERSHIP 2014 AVG. WEEKDAY PASSENGER BOARDINGS (L1, L2)	4,000+

*Demographic and income information applies for the trade area illustrated on Page 19. Please see References on Page 24 for source information.

THE POTENTIAL RETAIL CUSTOMER BASE HAS SEVERAL DISTINGUISHING CHARACTERISTICS:



Among Van Ness residents, two customer profiles are prominent: Young, single professionals and retired couples. From a retail standpoint, these two profiles are not compatible as customer types (each one patronizes different stores and restaurants, for example).

Within the neighborhood, a cluster of wealthy households skews the average household income for Van Ness.

Consumer spending reports for Van Ness indicate a strong preference for dining out and spending on home décor and improvement. Grocery spending lags approximately 20% below the national average household.



Approximately 62% of employees in Van Ness hold professional/managerial positions. Administrative/retail employees make up 34% of the local workforce. Trade and labor workers comprise an additional 6% of employees within the neighborhood.



Nearly half of the students enrolled at UDC are also residents of the District of Columbia. Within the Law School, 17% of students live in Ward 3.

WHAT DOES THIS MEAN?

The customer profile for Van Ness is diverse, yet clustered. Retailers that locate in this neighborhood take the risk of attracting one group of patrons while alienating the others. Categories of retail that appeal to all customers, regardless of age, household composition, brand/style preference, and price point will be the most successful. These tenant types are typically found in the Neighborhood Goods & Services and Food & Beverage categories, and might include grocery stores, drugstores, salons/barbers, restaurants, cafes, and coffee shops.



A trade area identifies the market segment from which the study area (neighborhood, district, or node) draw regular sales. Trade areas are impacted by competition, drive times, sociological and geographic boundaries, shopping patterns by customer type, pedestrian volumes, and other similar factors. This information provides a starting point for understanding the existing and potential customer base for the retail market.

RETAIL CATEGORIES

NG&S NEIGHBORHOOD GOODS & SERVICES

This category includes establishments that depend upon the patronage of local residents and workers. Neighborhood Goods & Services retailers rely on spending from a nearby residential and workforce customer base, generally within a one-mile radius. NG&S is “convenience-based” retail - it must be close, with easy access and parking.

EXAMPLES IN VAN NESS: GIANT FOODS, CVS, CALVERT-WOODLEY, ZIPS

F&B FOOD & BEVERAGE

This category includes establishments that serve food and/or alcohol consumed on premises. Food & Beverage establishments can attract customers from a larger trade area than NG&S retailers, especially when they are clustered. A greater number of patrons will be interested in a collection of F&B establishments that offer a variety of options.

EXAMPLES IN VAN NESS: POTBELLY SANDWICHES, ACACIA, BREAD FURST

GAFO GEN'L MERCHANDISE, APPAREL, FURNISHINGS, OTHER

GAFO retailers face a tremendous amount of competition, both in stores and online, for a relatively small percentage of household expenditures. Successful GAFO stores attract customers from long distances. However, these stores also rely on the exposure and foot traffic generated by an anchor that draws people with the same customer profile.

EXAMPLES IN VAN NESS: N/A

RETAIL SUPPLY

WHAT TENANTS ARE HERE TODAY?

The current mix of retailers in Van Ness include national tenants (Starbucks), long-standing local shops (Calvert-Woodley Liquor & Wines), and new-to-the-neighborhood establishments (Bread Furst). When evaluating the retail market for Van Ness, the supply and demand are calculated within the context of three retail categories.

CURRENT RETAIL SPACE

In Van Ness today, Food & Beverage retailers occupy 21,988 square feet of space. Neighborhood Goods & Services tenants are located in 70,499 square feet of space, which includes the 25,000 square-foot Giant grocery store, the largest retailer in the neighborhood.

The total amount of retail-occupied space is **92,487** square feet. An additional 8,200 square feet are vacant (8.0%). Non-retail uses, including Gold's Gym, Bank of America, and WAMU, occupy approximately 26,500 square feet of ground-level space that might otherwise be leased to a retail tenant.

RETAIL DEMAND



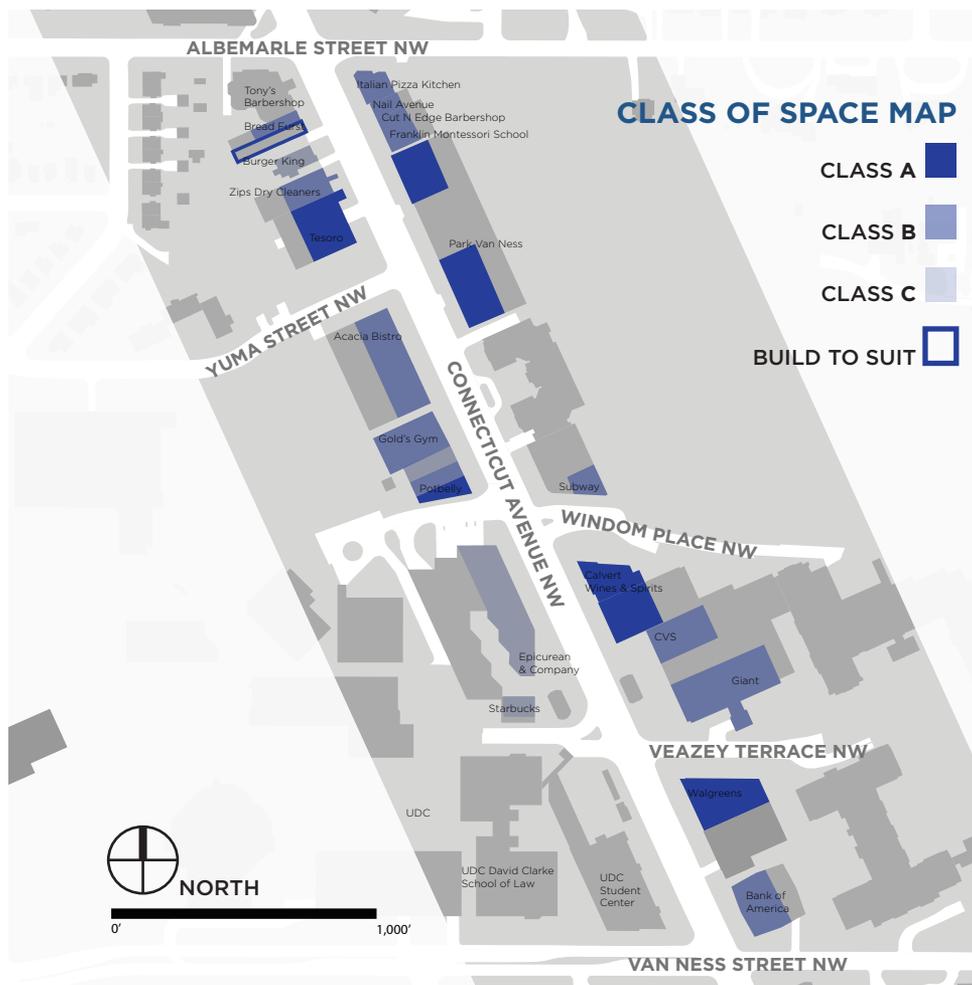
The retail customer trade area identifies the segments from which stores and restaurants draw a majority of their regular sales. Trade areas are impacted by competition, drive/walk times, sociological and geographical boundaries, shopping patterns and other similar factors.

The Van Ness trade area is constrained by strong retail competition from Chevy Chase, Cleveland Park, and Tenleytown. Its eastern boundary is limited by Rock Creek Park.

WHAT TENANTS COULD BE SUPPORTED?

Spending by existing and potential customers for Van Ness retailers is estimated by data gathered from the U.S. Bureau of Labor Statistics, International Council of Shopping Centers and the College Board. By aggregating the amount of retail spending by residents, employees, students, and visitors that could be reasonably captured in Van Ness, the total amount of retail demand for the neighborhood is approximated in the table below.

TOTAL ESTIMATED RETAIL DEMAND		
RETAIL CATEGORY	AMOUNT OF POTENTIAL RETAIL SPENDING	SQUARE FEET OF POTENTIAL RETAIL DEMAND
NG&S	\$18,805,500	62,500
F&B	\$11,712,000	32,000
GAFO	\$2,568,000	7,000
TOTAL	\$33,085,500	104,500



RETAIL CLASS OF SPACE

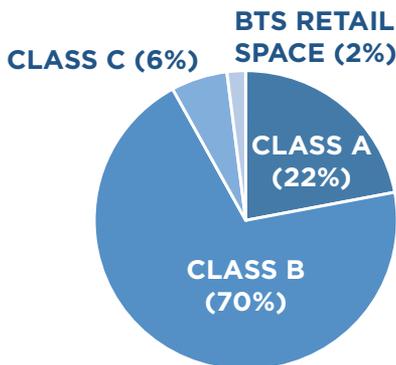
The quality of the ground-level retail space is a critical measurement in determining the ability of an area to attract tenants and support customer sales. For Van Ness, an inventory was undertaken to determine the amount and “retail-readiness” of ground-level spaces. This evaluation provides an assessment of the retail supply within the neighborhood.

The total amount of existing retail space currently in supply does not provide the most accurate market depiction. In most markets, it is typical to find retail establishments that maintain operations in substandard spaces and locations. As new, better quality space is constructed, the substandard space is often replaced or converted to a non-retail use.

EXISTING VAN NESS RETAIL INVENTORY (CLASS OF SPACE)

The small amount of high quality (Class A) retail space in Van Ness creates a condition where tenants that might be attracted to the neighborhood's strong demographics and income data are unable to find suitable space to lease.

The Class A retail space that does exist is scattered and prevents the "clustering" of sought-after tenants. Today, the majority of space is class B.



CLASS A

- is located at a corner/end of a row of retail spaces or prominently situated among a row of establishments;
- has a floor-to-ceiling clear height of 14 feet or more;
- has a storefront width of 20 feet or more;
- is well-maintained;
- is clearly visible from primary streets;
- is constructed with quality materials;
- is properly lit exterior and display spaces;
- has clear pedestrian and vehicular access.

CLASS B

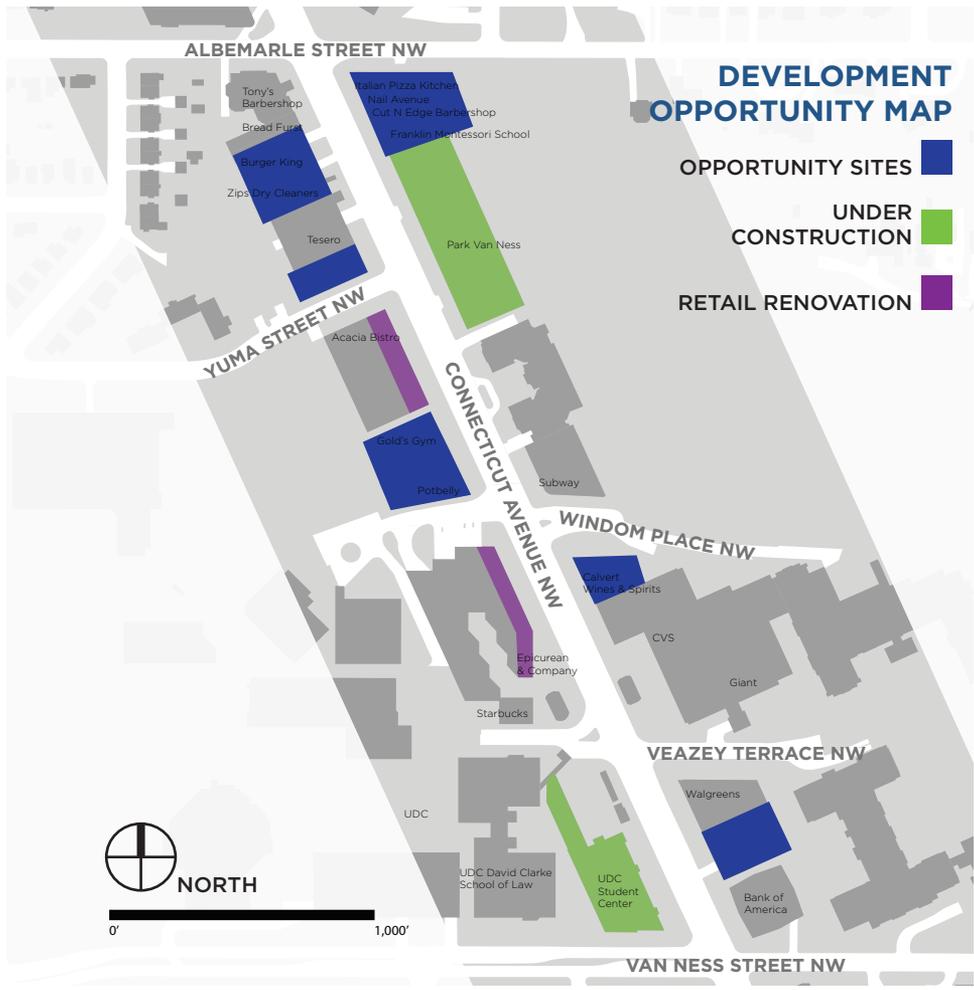
- is well-situated among in-line establishments;
- has a floor-to-ceiling clear height of approximately 12 feet or more;
- has a storefront width of 15 feet or more;
- is well-maintained; and
- has lower quality characteristics than those listed for Class A space.

CLASS C

- is located among in-line establishments;
- has a floor-to-ceiling clear height of less than 12 feet;
- has a storefront width of less than 15 feet; and
- has lower quality characteristics than those listed for Class B space.

BUILD-TO-SUIT (BTS)

- Space that is listed as BTS has been constructed for a specific tenant in such a manner that conversion to another use or tenant will be difficult or impractical.



DEVELOPMENT OPPORTUNITIES

There are a number of properties in the Study Area that are candidates for redevelopment. In some cases, owners of these properties are considering redevelopment, in others, tenants are vacating, and in others, existing buildings are not built to the full capacity allowed by existing zoning. Opportunity sites noted above are underbuilt relative to zoning. Any buildings built or significantly renovated in the last five years are excluded.

All of the sites listed as redevelopment opportunities in the map are zoned C-3-A. This zoning allows for substantial by right redevelopment potential up to 65 feet tall. These are properties that, when redeveloped, could become contributing assets to the new vision of Van Ness - if specific design and land use questions are answered.

REAL ESTATE DEVELOPMENT AS A CATALYST

The development opportunity map to shows that redevelopment of sites along Connecticut Avenue NW from Van Ness Street to Albemarle could catalyze transformation of the Avenue into a true Vibrant Street.

Each of these sites could potentially redevelop in the next 5 to 10 years. Each has the opportunity to replace existing conditions with more retail-appropriate space, a more continuous and inviting public space and the types of retailers that are in line with current market demand.

A few sites have recently been redeveloped. The Park Van Ness building at 4455 Connecticut Avenue, NW, which is slated to include approximately 9,000 SF of ground floor retail; and the UDC Student Center at the corner of Connecticut Avenue and Van Ness Street. The new Student Center can directly engage with the corridor through new public space and increased interaction between UDC and Connecticut Avenue.

Each of these redevelopment efforts has the opportunity to contribute greatly toward the desire for a vibrant neighborhood corridor, if the right criteria of design and function are met.

REAL ESTATE DEVELOPMENT INCREMENTS

With new development, retail demand increases. Additional residents, employees, visitors, and students in the Van Ness neighborhood are projected to contribute the following increments to the overall retail demand totals:

Use Type	Amount of Retail Demand Generated
Each additional single family house	19 square feet
Each additional multi-family housing unit	16 square feet
Each additional hotel room	9 square feet
Each additional 1,000 square feet of commercial office space occupied (existing vacancy filled or new construction)	4 square feet
Each additional full time equivalent (FTE) student enrolled at UDC	1.8 square feet

Getting Started

BUILD A STRONGER NEIGHBORHOOD IDENTITY

Ties between residents, students, employees, and visitors can all be strengthened through improvements to the physical condition of Connecticut Avenue. An organized and focused approach can help to achieve a powerful and unified identity for Van Ness.

The commercial district identity could be enhanced through:

- Appropriately scaled and designed public spaces - from sidewalk to informal gathering zones to a central meeting plaza.
- Improved streetscape - enhancing plant life, improving water management with green infrastructure techniques, and providing discrete zones for pedestrians - will all lead to a more successful retail and human environment.

FOSTER AN IMPROVED RETAIL DISTRICT

There is demand for retail in Van Ness. However, it cannot be met with existing supply. A lack of continuous, linear retail space makes it difficult to establish a true district without upgrading and reshaping the public space. Without a “district identity,” the retail brokerage community does not know how (or why they should) sell Van Ness.

INCORPORATE A REAL ESTATE APPROACH

The neighborhood’s objectives for Connecticut Avenue and the interests of potential developers and retailers are not misaligned. An improved commercial district benefits everyone. By thinking about the residents’, employees’ and students’ needs and wants from a real estate perspective, it will be easier for the Van Ness community to achieve their goals and gain new partners in the reaching its vision.

Why do we want better sidewalks along Connecticut Avenue? It is because we desire a walkable and memorable environment, but also because it is the gateway to UDC and will improve student recruitment.

Why do we want a better retail environment? It is because we want a selection of goods and services in our neighborhood, but it will also make it easier to attract office tenants, for example. Taking the “real estate approach” to a better Connecticut Avenue will have a significant impact on bringing the necessary implementation resources - momentum, will, approvals, and funds - to bear.

ADDITIONAL RESOURCES

DC Office of Planning

(DCOP) www.planning.dc.gov

The Office of the Deputy Mayor for Planning and Economic Development

(DMPED) www.dmped.dc.gov

Department of Housing and Community Development

(DHCD) www.dhcd.dc.gov

Department of Small and Local Business Development

(DSLBD) www.dslbd.dc.gov

Washington, DC Economic Partnership

(WDCEP) www.wdcep.com

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