A detailed white line-art map of the Adams Morgan neighborhood in Washington, D.C., serves as the background for the top half of the cover. The map shows a dense grid of streets, building footprints, and parks.

AM

IDEAS FOR ADAMS MORGAN

**NEIGHBORHOOD
PROFILE** 2015

**A D A M S
M O R G A N**
VISION FRAMEWORK

**BEYER
BLINDER
BELLE**
streetsense

District of Columbia
Office of Planning

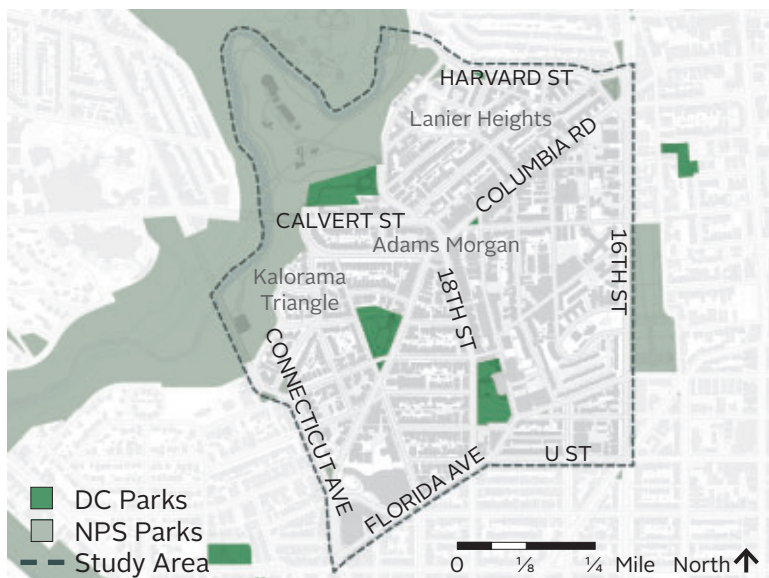


Project Description

The DC Office of Planning has launched the Adams Morgan Vision Framework, a short, strategic planning initiative and engagement process that will utilize technical analysis and build on previous planning studies to define key goals and action items for the neighborhood. The project will provide an opportunity for residents, local businesses, institutions, and property owners to work together on articulating a vision for the future of Adams Morgan. The planning effort will culminate in the Adams Morgan Vision Framework document, an action plan that will identify opportunity areas to preserve physical characteristics, enhance retail and amenities, support sustainability, and improve quality of life for the community.

This Profile document provides an analysis of existing conditions of the Adams Morgan Study Area defined in the figure below. The Profile includes information on: 1) demographic and income data; 2) historic districts and landmarks; 3) land use and zoning; 4) parks and open space; 5) transportation; 6) housing; 7) retail conditions; and 8) sustainability. The purpose of the Profile is to inform and support stakeholders in discussions at the Adams Morgan Community Workshop on February 28, 2015, and to help shape recommendations for the Adams Morgan Vision Framework final document.

STUDY AREA



SURVEY AND INPUT ORGANIZED BY THE “ENVISION ADAMS MORGAN” COMMUNITY GROUP

The current District led planning initiative was launched in response to a request from the Envision Adams Morgan group to focus on opportunities in the neighborhood. Envision Adams Morgan was organized in 2012 as a forum to create a common and shared vision of the Adams Morgan neighborhood. Members of the community engaged the work of planning students at Catholic University of America for background research, hosted monthly meetings, and created an online survey that achieved over 500 responses.

The survey invited responses to a variety of topics pertaining to the Adams Morgan neighborhood. Respondents were able to give opinions on community services & facilities, cost of living, businesses & retail, neighborhood economy, sustainability, housing, diversity, historic preservation, and transportation. These issues are critical in developing a new vision for Adams Morgan. Survey results for some of these key issues are summarized below.



SUSTAINABILITY

Sustainability was one of the most favorably rated topics in the survey, with a vast majority of participants rating sustainable approaches to the following items as “very important”: energy, waste, water, food, transportation, nature, and health.



TRANSPORTATION

Issues surrounding transportation show that the majority of participants rank public transportation, walking, and biking as “very important,” with driving as less important. However, parking is noted in responses as a problem in Adams Morgan.



BUSINESS & RETAIL

A variety of neighborhood business offerings were categorized by respondents as “very important,” with the following types among the most popular: arts & entertainment, grocery & liquor stores, pharmacies, and restaurants & bars.



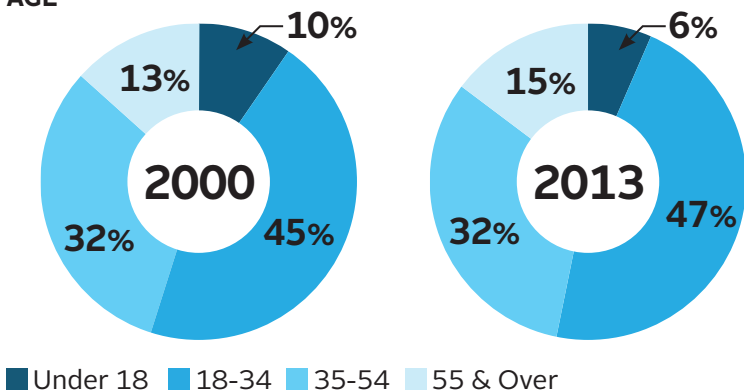
HOUSING

With a mixture of homeowners and renters responding, most people responded that housing costs in Adams Morgan are not affordable.

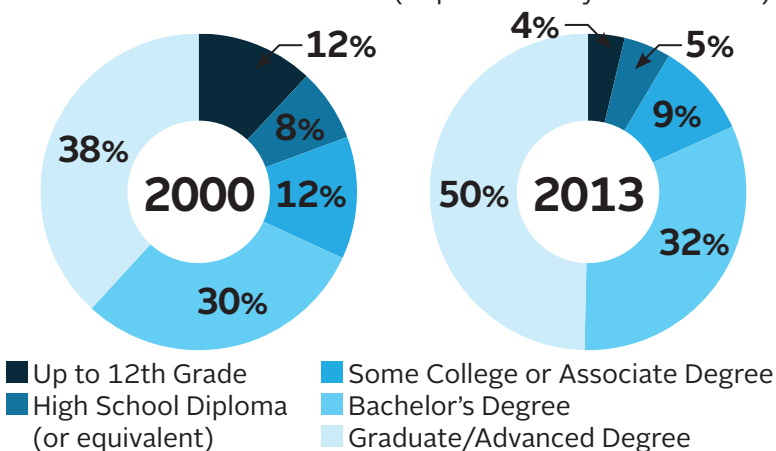
More Envision Adams Morgan information can be found at the website: www.envisionadamsmorgan.anc1c.org.

Demographics

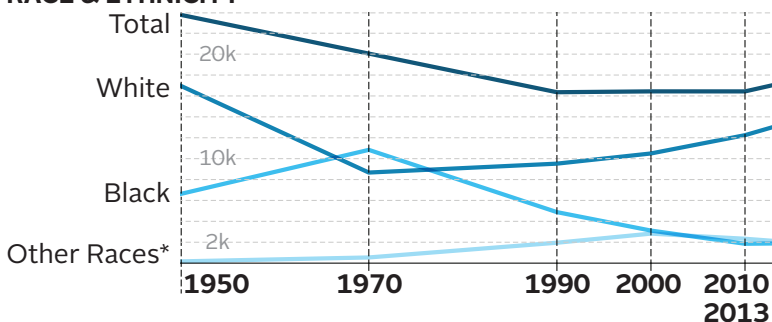
AGE ¹



EDUCATIONAL ATTAINMENT ¹ (Population 25 years and over)

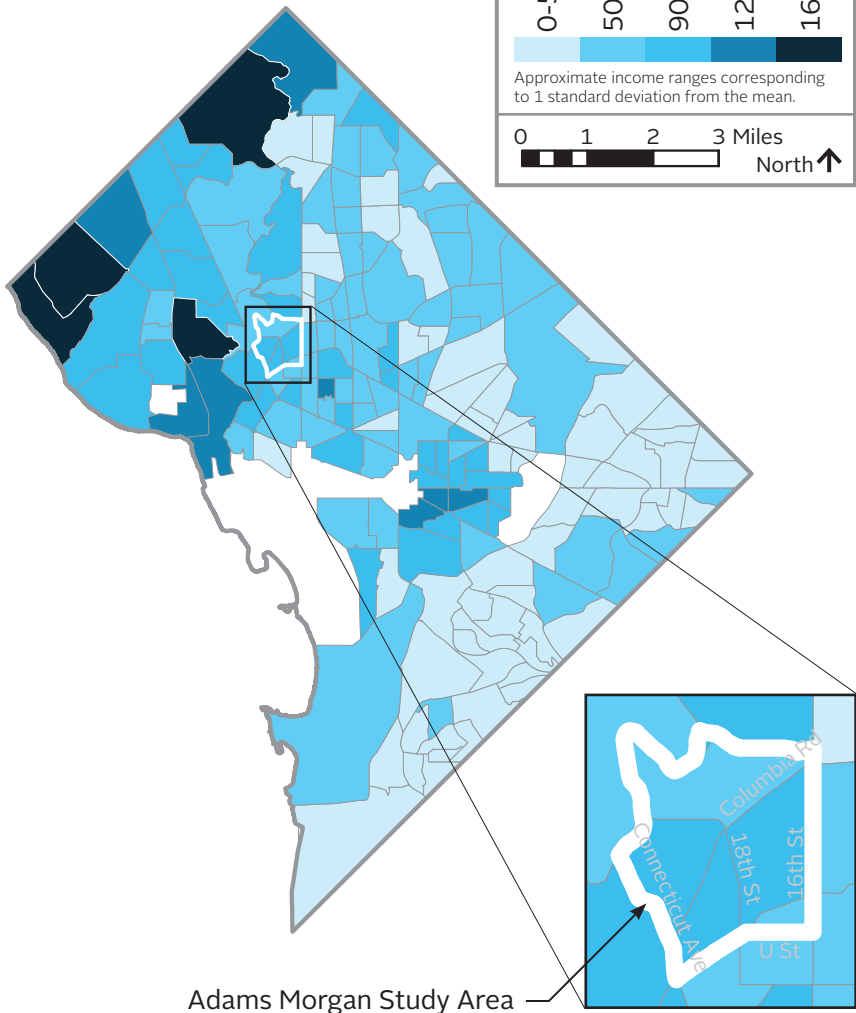


RACE & ETHNICITY ¹



*Census data for some racial group categories were not available before 1990.

2012 INCOME DISTRIBUTION MAP FOR WASHINGTON, DC ²



MEDIAN HOUSEHOLD INCOME FOR ADAMS MORGAN ¹



Sources: 1 - US Census Bureau, Censuses 1950, 1970, 1990, 2000 & 2010; 2009-2013 American Community Survey 5-Year Estimates
2 - US Census Bureau, 2008-2012 American Community Survey 5-Year Est.

Neighborhood History Overview



1861¹

Early map showing present-day Adams Morgan area

1911

The Covington at 1848 Columbia Road. It is an example of the modest-sized apartment buildings constructed in Washington Heights during the first two decades after WWI to accommodate the city's growing middle class, many of whom worked for the federal government.



1928

The Park Tower at 2440 16th Street in Meridian Hill



1892

1883²

Subdivision Plat for Lanier Heights, signed by namesake real estate speculator Elizabeth Lanier Dunn



1900³



1910³



1914³



Rowhouse construction in the Kalorama Triangle neighborhood

1917⁴

The celebrated Knickerbocker Theater was later the site of a disastrous roof collapse.



Electric streetcar in operation⁴



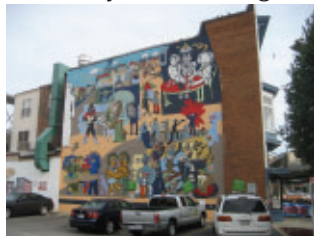
1950s

The name Adams Morgan was coined following desegregation of the public schools when the principals of the mostly white Adams School (top) and the mostly black Morgan School (bottom) helped organize the Adams Morgan Better Neighborhood Conference, an advocacy organization for civic improvements. The Adams Morgan Better Neighborhood Conference ultimately played a critical role in the area's urban renewal plan.



2005²

The restored “Un pueblo sin murales es un pueblo desmuralizado” on Adams Mill Road, first painted in the 1970s to celebrate the Latino community in Adams Morgan



1962

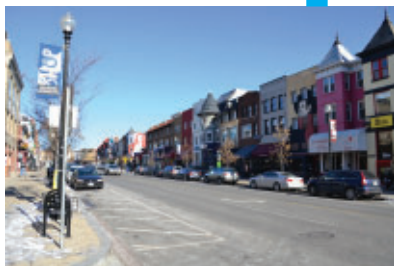
1947²

Small commercial buildings arose along the streetcar lines on Columbia Road and 18th Street, NW. These buildings offered basic services for local residents in the area.



2015

Today, the 18th Street corridor between Belmont and Columbia Roads is host to a wide array of restaurants, bars, and stores and a recent DDOT streetscape update.



1970s²

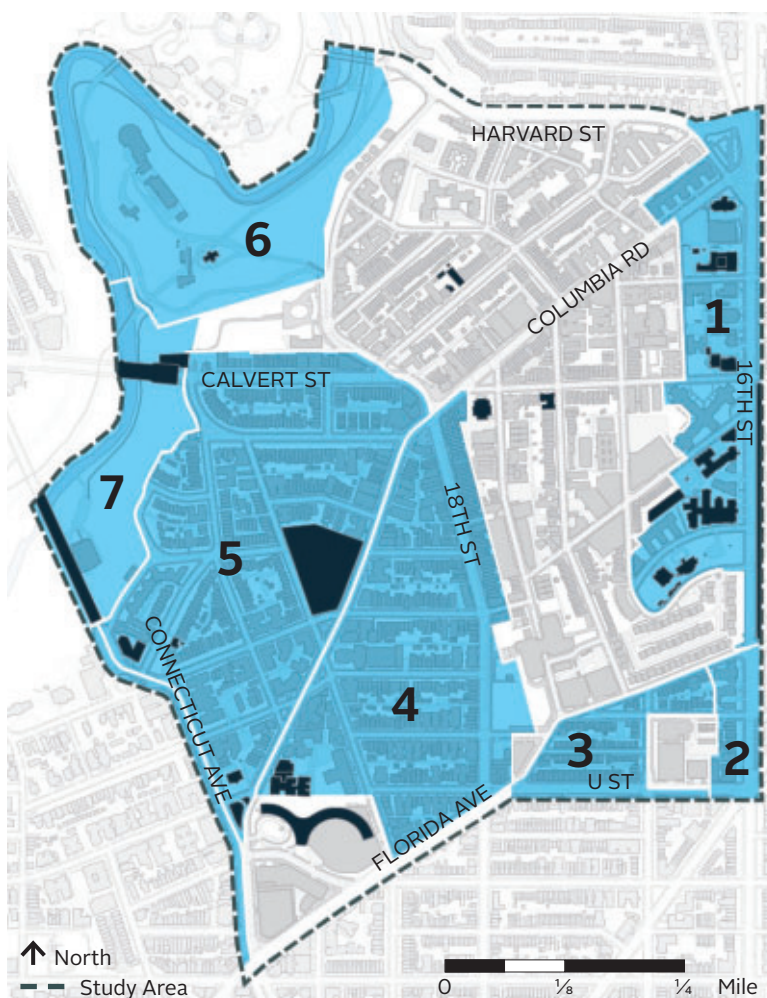
Columbia Road continued to be an active commercial corridor and transportation route.

- Sources: 1 - 1861 A. Boschke Map
 2 - EHT Tracerics Inc., *Intensive-Level Survey of Lanier Heights, Washington, D.C.*
 3 - D.C. Preservation League, EHT Tracerics Inc., and D.C. Office of Historic Preservation, *Kalorama Triangle Historic District*
 4 - EHT Tracerics Inc., *Washington Heights Historic District*
 5 - http://upload.wikimedia.org/wikipedia/commons/6/69/John_Quincy_Adams_Elementary_School.JPG

Historic Districts & Landmarks

- 1 - Meridian Hill Historic District
- 2 - Sixteenth Street Historic District
- 3 - Strivers Section Historic District
- 4 - Washington Heights Historic District
- 5 - Kalorama Triangle Historic District
- 6 - National Zoological Park
- 7 - Rock Creek & Potomac Parkway

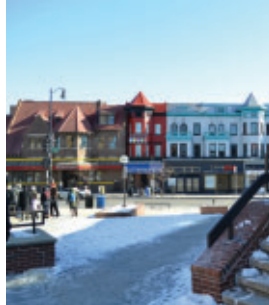
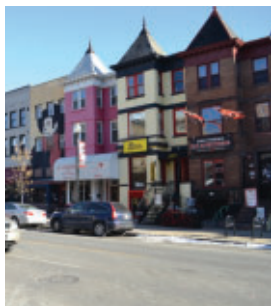
- Historic Districts
- Historic Landmarks & Sites



Sources: Data retrieved from DC Data Catalog (<http://data.dc.gov/>).

Neighborhood Character

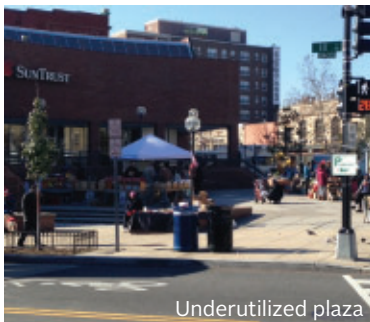
Adams Morgan is a neighborhood made up of historic and modern buildings, residential and commercial uses, and a diverse population. This variety in neighborhood character is one of its greatest assets.



Diversity of Public Spaces



Functional alley network



Underutilized plaza



Recent Construction



Typical residential street

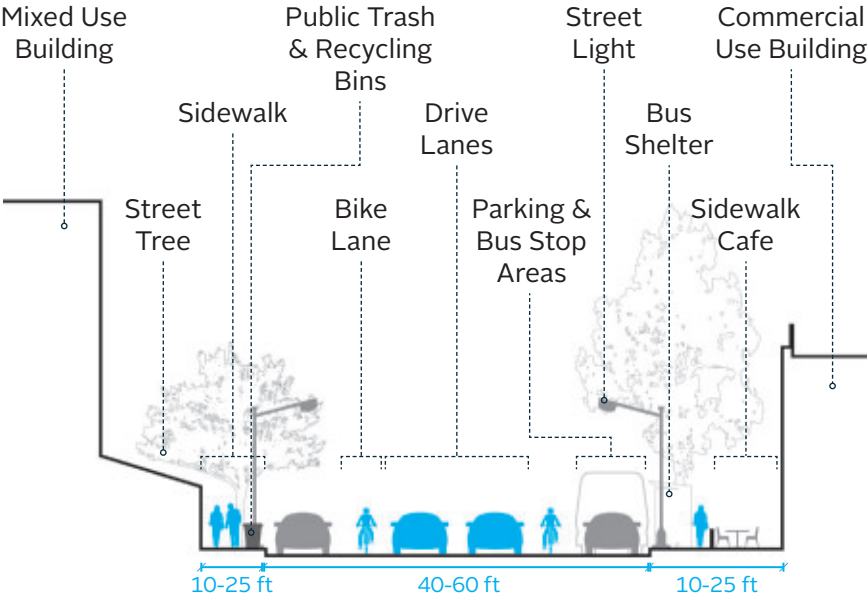


Unity Park

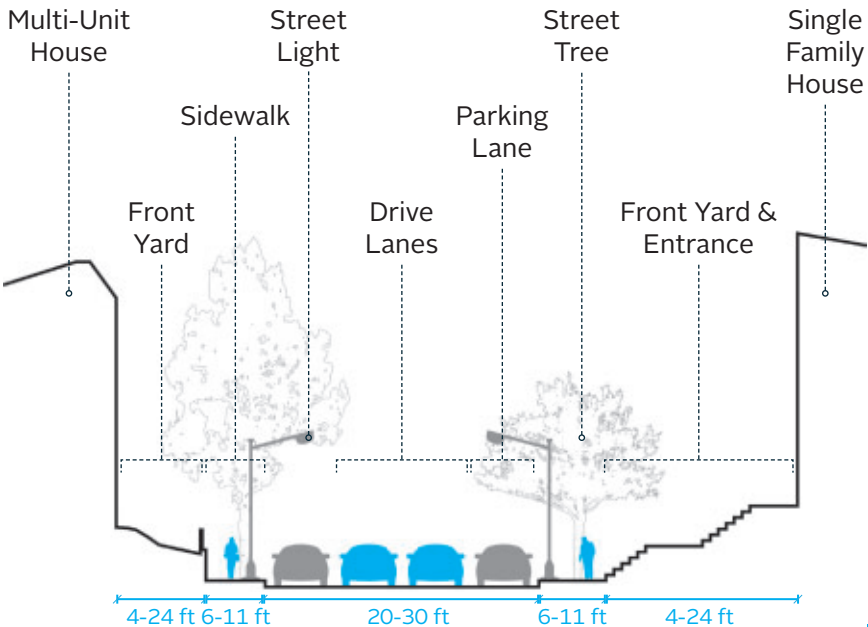


Typical rowhouses

TYPICAL COMMERCIAL STREET SECTION (COLUMBIA ROAD)



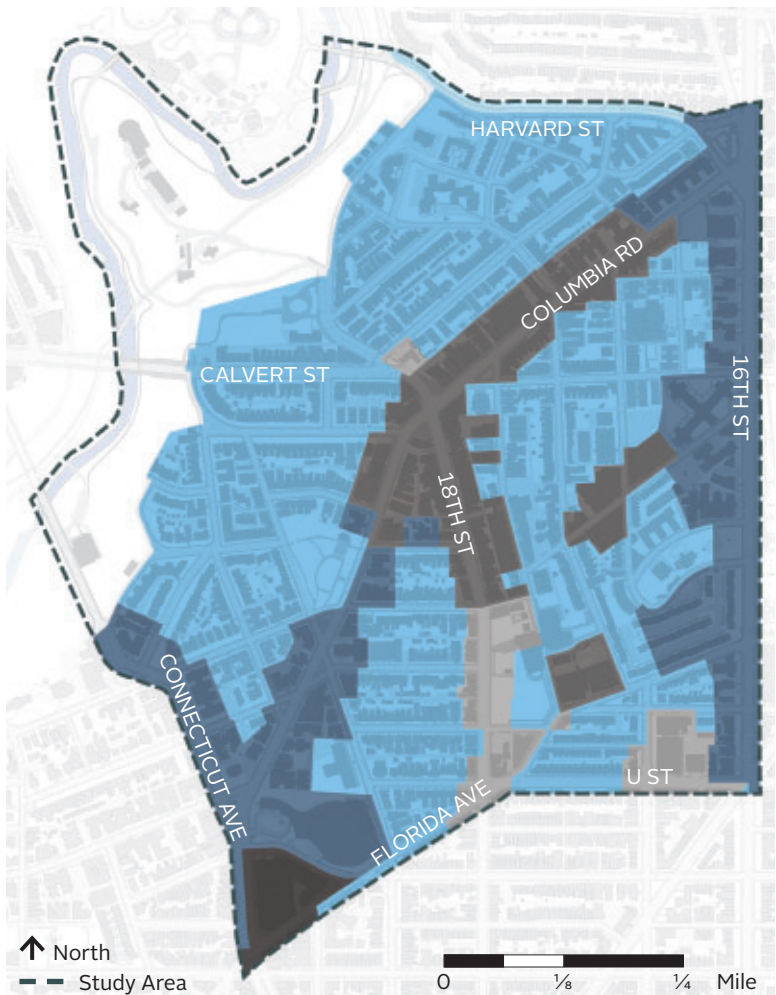
TYPICAL RESIDENTIAL STREET SECTION (KALORAMA ROAD)



Zoning Map

- C-2-A Low Density Commercial
- C-2-B Moderate Density Commercial
- C-3-C High Density Commercial
- R-4 Moderate Density Residential
- R-5-B Moderate Density Residential
- R-5-D High Density Residential

Specific zoning regulations for the listed districts, and others, can be found on the website of the DC Office of Zoning (<http://dcoz.dc.gov/>).

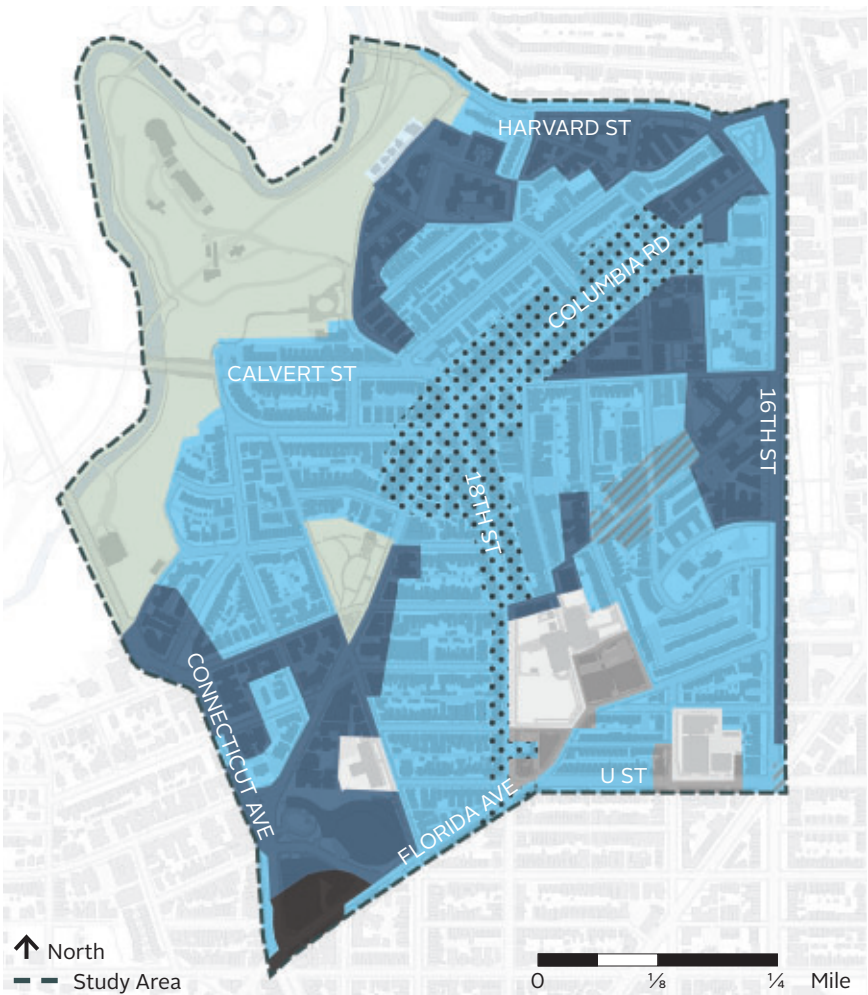


Sources: Data retrieved from DC Data Catalog (<http://data.dc.gov/>).

Comprehensive Plan

FUTURE LAND USE MAP

- Parks, Recreation & Open Space
- Local Public Facilities
- Residential Medium Density
- Residential Moderate Density
- Residential Low Density
- Commercial Medium Density
- Commercial Low Density
- Commercial Low Density & Residential Moderate Density
- Commercial Moderate Density & Residential Moderate Density



Sources: Data retrieved from DC Data Catalog (<http://data.dc.gov/>).

Parks and Open Spaces

Adams Morgan has several parks and open spaces within and surrounding the neighborhood, including Walter Pierce Park, Kalorama Park, Marie Reed Recreation Center, Meridian Hill Park, Rock Creek Trail, and the Smithsonian National Zoological Park, to list a few.



Rock Creek Trail¹



Walter Pierce Park²



Kalorama Park

Institutional Community Assets³

Community and cultural involvement is a strength of the Adams Morgan neighborhood. The Reed Cook Neighborhood Association, Kalorama Citizens Association, Lanier Heights Citizens Association, and ANC1C, are significant community assets in the area. Some of the other institutions that play key roles in Adams Morgan are listed below and indicated by number on the map on the adjacent page.

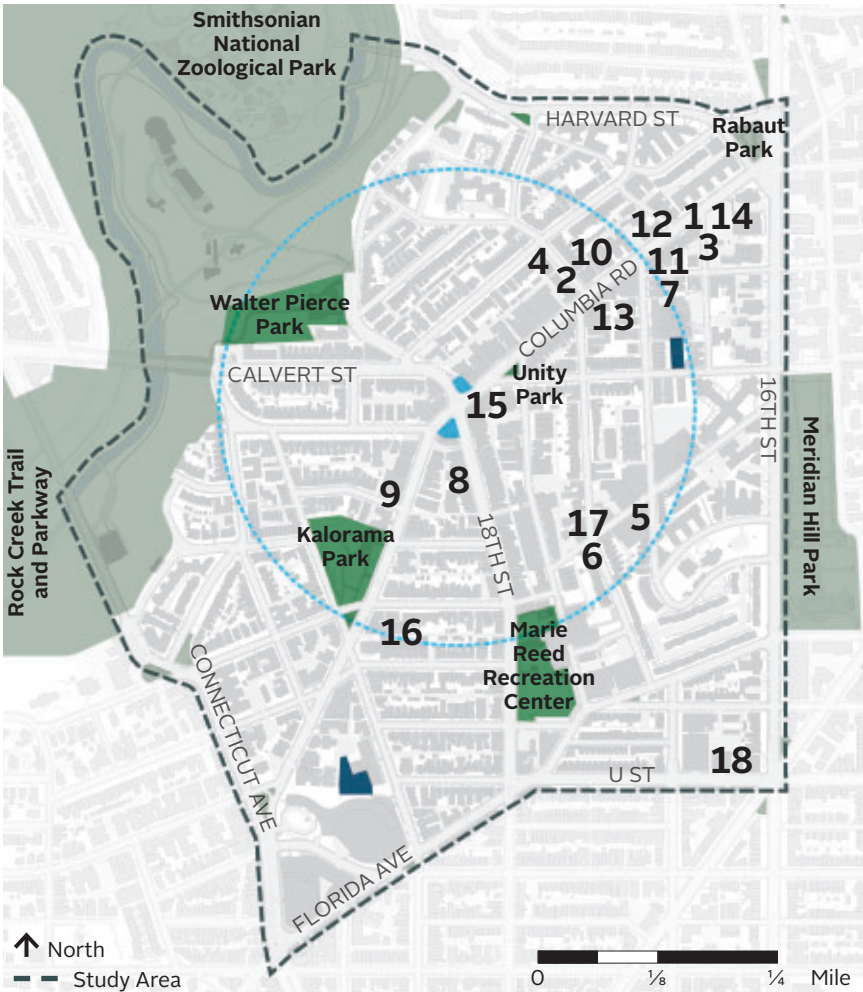
1. THE FESTIVAL CENTER – HEADQUARTERS OF THE CHURCH OF THE SAVIOR AND THE SERVANT LEADERSHIP SCHOOL
2. JUBILEE JOBS
3. JUBILEE HOUSING
4. JOSEPH'S HOUSE
5. SITAR CENTER
6. MARY'S CENTER
7. SARAH'S CIRCLE
8. DC ARTS CENTER
9. HIERARCHY ART STUDIO
10. CHRIST HOUSE
11. COLUMBIA ROAD HEALTH SERVICES
12. POTTER'S HOUSE
13. WABA – WASHINGTON AREA BICYCLIST ASSOCIATION
14. ADAMS MORGAN PARTNERSHIP BID
15. CHRISTIAN SCIENCE READING ROOM
16. GOODWILL BAPTIST CHURCH
17. EMMANUEL BAPTIST CHURCH
18. FIRE STATION

100% of residences in the study area are within a 5 minute walk to a park of at least 0.5 acres in size. Additionally, **nearly 100% of housing** is within 5 minutes of a playground.

.....

MAP OF PARKS, OPEN SPACES, AND COMMUNITY ASSETS ⁴

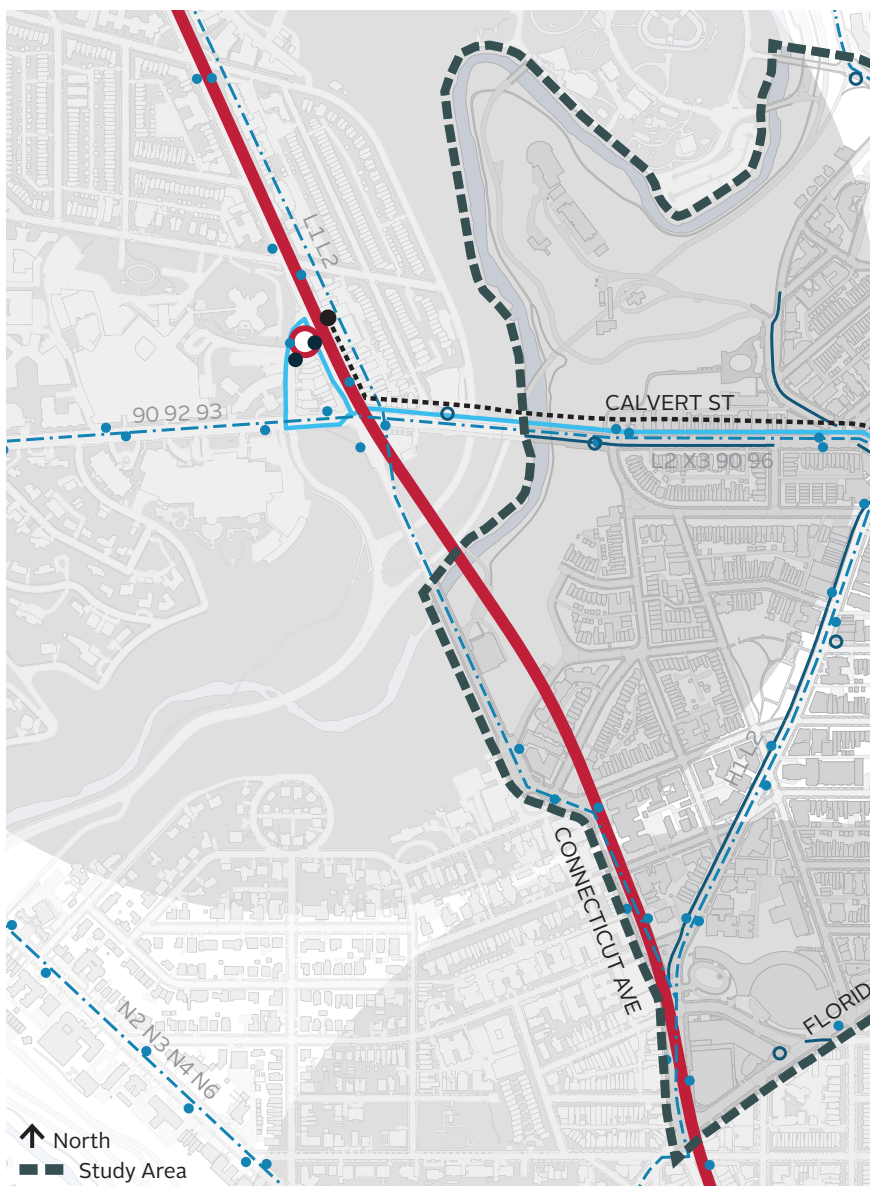
- DC Parks
- Urban Plazas (privately controlled)
- 5 Minute Walk from Plazas
- NPS Parks
- Open Spaces on Public School Grounds



Sources: 1 - Park image is permitted for free use through Wikipedia Commons. Photo credit is Carol M. Highsmith.
2 - Photo credit is homevisit.com, Continental Properties, Ltd.
3- Institutional assets list was compiled by the DC Office of Planning, with the assistance of the Adams Morgan Business Improvement District.
4 - Map data retrieved from DC Data Catalog (<http://data.dc.gov/>).

Connectivity & Access

Adams Morgan can be accessed by a variety of transportation modes, including: MetroBus, DC Circulator, bike lanes, Capital Bikeshare, car share, and MetroRail (indirectly via three metro stations). Additionally, many residents own personal vehicles. The neighborhood is identified in Move DC for the District's high capacity transit system.



Sources: Data retrieved from DC Data Catalog (<http://data.dc.gov/>).

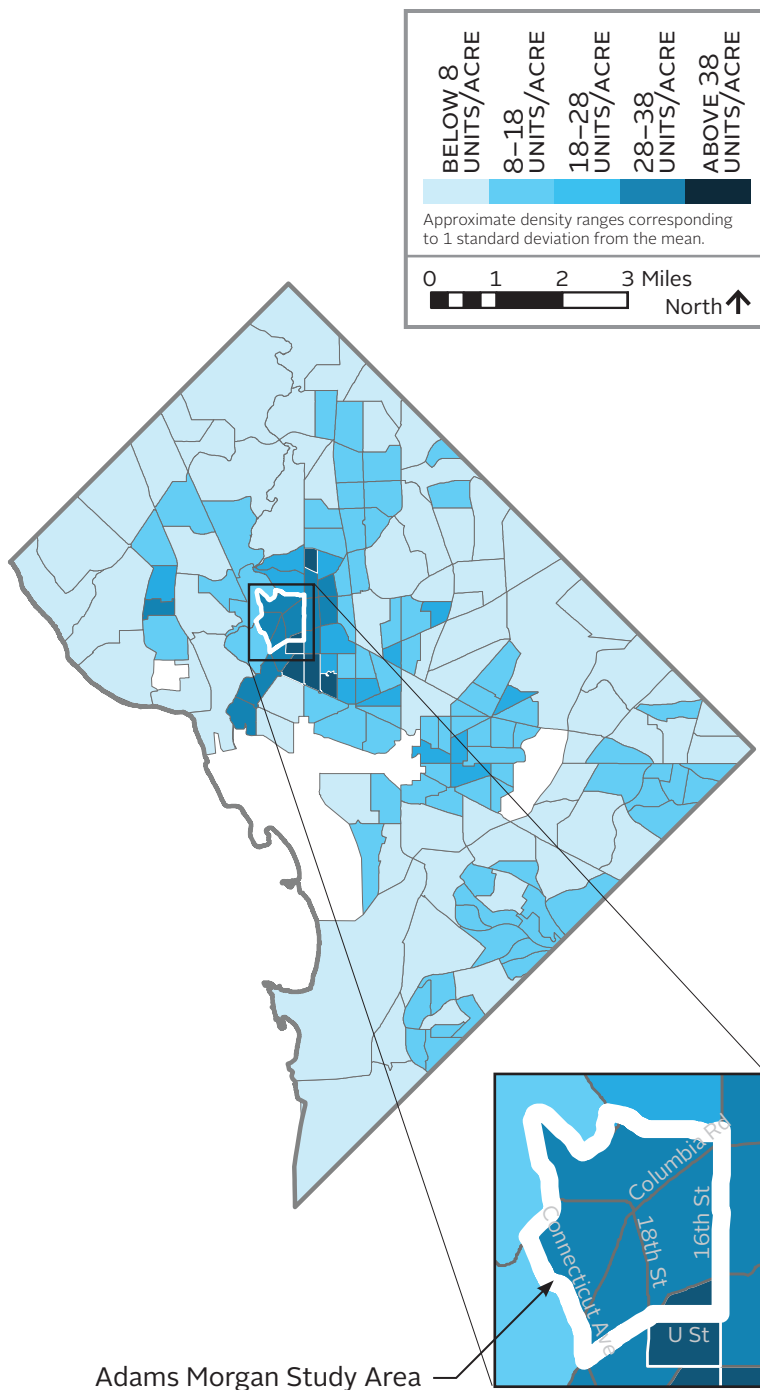
PUBLIC TRANSPORTATION MAP

- MetroRail Lines
- MetroRail Stations
- Bike Lanes
- Capital Bikeshare Stations
- 10 Minute Walk from Metro
- MetroBus Lines
- MetroBus Stops
- Circulator Bus Routes
- Circulator Bus Stops
- Future High Capacity Transit




Housing Density

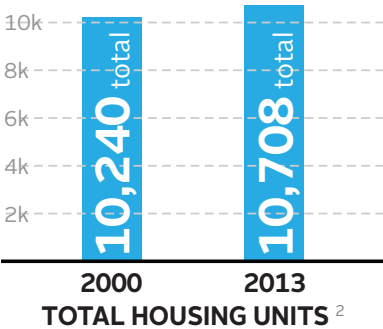
2012 HOUSING DENSITY MAP FOR WASHINGTON, DC ¹



As one of the densest residential areas in the District of Columbia, Adams Morgan provides a variety of housing types, which helps to create a diverse population within the community.

HOUSING UNITS PER BUILDING ³

	% OF ALL BUILDING	% OF HOUSING UNITS	
NON-RESIDENTIAL BUILDINGS	16%	--	
1-2 UNITS	53%	12%	7.4 Average Units per Building
3-10 UNITS	20%	14%	
11-50 UNITS	8%	31%	
> 50 UNITS	3%	43%	



Single-Family
19 units sold
\$969,442 avg. price



Condominium
230 units sold
\$459,178 avg. price

2013 SALES OF UNITS ⁴

Adams Morgan has **349** subsidized affordable rental units. ⁵

Sources: 1 - US Census Bureau, 2008-2012 American Community Survey 5-Year Estimates
2 - US Census Bureau, Censuses 2000; 2009-2013 American Community Survey 5-Year Estimates
3 - OCTO Master Address Repository, DC Office of Planning
4 - Office of Tax and Revenue Real Property Sales ("Market" Sales)
5 - DC Preservation Network Database

DC Retail Overview

During the years following the 2008 downturn, Washington DC's market has secured a reputation as one of the country's most durable, yet vital retail economies. Whereas other cities are only now recovering from high vacancy rates and stalled business start-ups, the District's downtown and neighborhood retail environments hardly missed a beat, continuing to attract new stores and restaurants at a rapid pace.

Local and national retailers "discovered" DC's neighborhood commercial districts in large numbers during the recession rebound.

POINTS OF MARKET DISTINCTION

2010 (ESTABLISHED)

1. GEORGETOWN
2. FRIENDSHIP HEIGHTS
3. DUPONT CIRCLE
4. ADAMS MORGAN

2015 (EMERGING)

1. 14TH STREET NW
2. U STREET NW
3. H STREET NE
4. SHAW

Driven in part by the "residential renaissance" that the District is experiencing, as well as the shopping and dining preferences of the Millennial generation, these pioneering areas are desirable alternatives to the more traditional retail centers. Adams Morgan's place in this changing landscape is shifting. Although a popular food and entertainment center for several decades, the neighborhood's customer base from its heydays are growing older. The 18-34 year-old DC demographic has taken pride in cultivating shops, cafes, and bars in the emerging districts.

AS ITS CUSTOMERS ARE CHANGING AND SHIFTING THEIR RETAIL PATTERNS, ADAMS MORGAN'S COMMERCIAL ENTERPRISES WILL NEED TO ADAPT AND, IN SOME WAYS, REINVENT THEMSELVES. BUT HOW AND INTO WHAT?

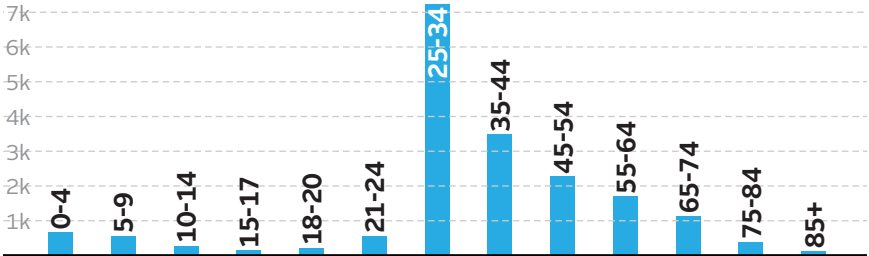


Customer Profile ¹

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.

POPULATION (2015 WITHIN TRADE AREA)	18,907
HOUSEHOLDS (2015 WITHIN TRADE AREA)	11,243
PERCENT OF 1-PERSON HOUSEHOLDS (2015 WITHIN TRADE AREA)	55.4%
RATIO OF RENTER-OCCUPIED TO OWNER-OCCUPIED HOUSING	2:1
HOUSEHOLD INCOME (2015 MEDIAN)	\$90,940
AVERAGE RENT/MO. – 1-BEDROOM APARTMENT (ZUMPER.COM)	\$1,973
AVERAGE AGE (2015 RESIDENTS)	38.3
EDUCATION (% OF RESIDENTS HOLD A MASTER'S OR HIGHER, 2015)	43.1%
GROWTH (2015-2020 PROJECTED POPULATION GROWTH)	9.32%
DAYTIME POPULATION (NUMBER OF EMPLOYEES, 2015)	9,506

AGE RANGE DISTRIBUTION (2015)



40% of Adams Morgan's residents are between the ages of 25 and 34 years old. As a concentrated cluster, this narrow demographic essentially represents the "youth" in the neighborhood. Although this customer group patronizes the Food & Beverage options along 18th Street, in particular, the range of options for DC nightlife has expanded considerably over the past several years. Today, U Street, H Street, 14th Street, and Shaw offer a higher level of direct competition for F&B sales than ever before.

ADAMS MORGAN RETAIL CONDITIONS



An estimated **456,500** square feet of space in Adams Morgan are appropriate for occupation by retailers (restaurants, stores, service-based establishments). Currently, approximately 365,650 square feet are leased or owned by retail uses.



Approximately **9%** of the total ground-level is vacant (45,370 square feet). An additional 9% of retail-appropriate space (45,480 square feet) is occupied by non-retail users (such as insurance agencies, travel agencies, banks, and medical offices).



Between 2013 and 2015, approximately **15%** of Adams Morgan's retail spaces changed tenants, were occupied, or became vacant, an atypical observation.

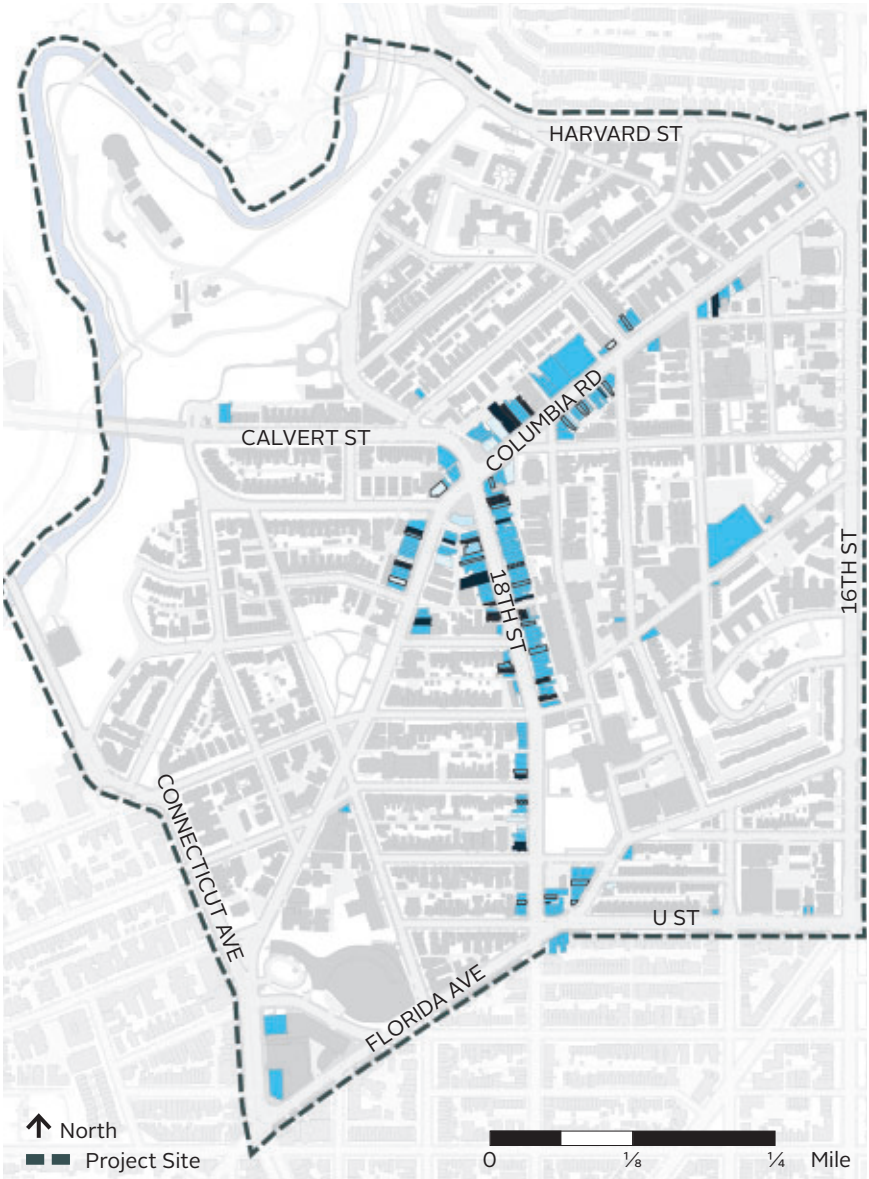


Attributing to the **35%** of Class C space, Adams Morgan has several retail buildings that stack tenants into underground, ground, and second floor spaces.



RETAIL STATUS MAP

- Occupied by non-retail use
- Retail
- Vacant
- Stacked (1 level retail/1 level non-retail use)
- Stacked (1 level retail/1 level vacant)
- Outlined spaces have switched tenant or retail status since a previous inventory was conducted in June 2013.

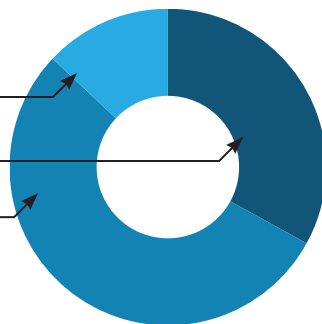


Supply (Retailers)

GAFO – 13%

NG&S – 33%

F&B – 54%



DISTRIBUTION OF RETAILER TYPES BY AREA (SQUARE FEET)

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 ADAMS MORGAN: SAFEWAY, CVS,
KALORAMA CLEANERS, AND GIOVANNI HAIR DESIGN

.....

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 ADAMS MORGAN: CASHION'S EAT PLACE,
DUPLEX DINER, AND JACK ROSE

.....

GAFO – GENERAL 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.

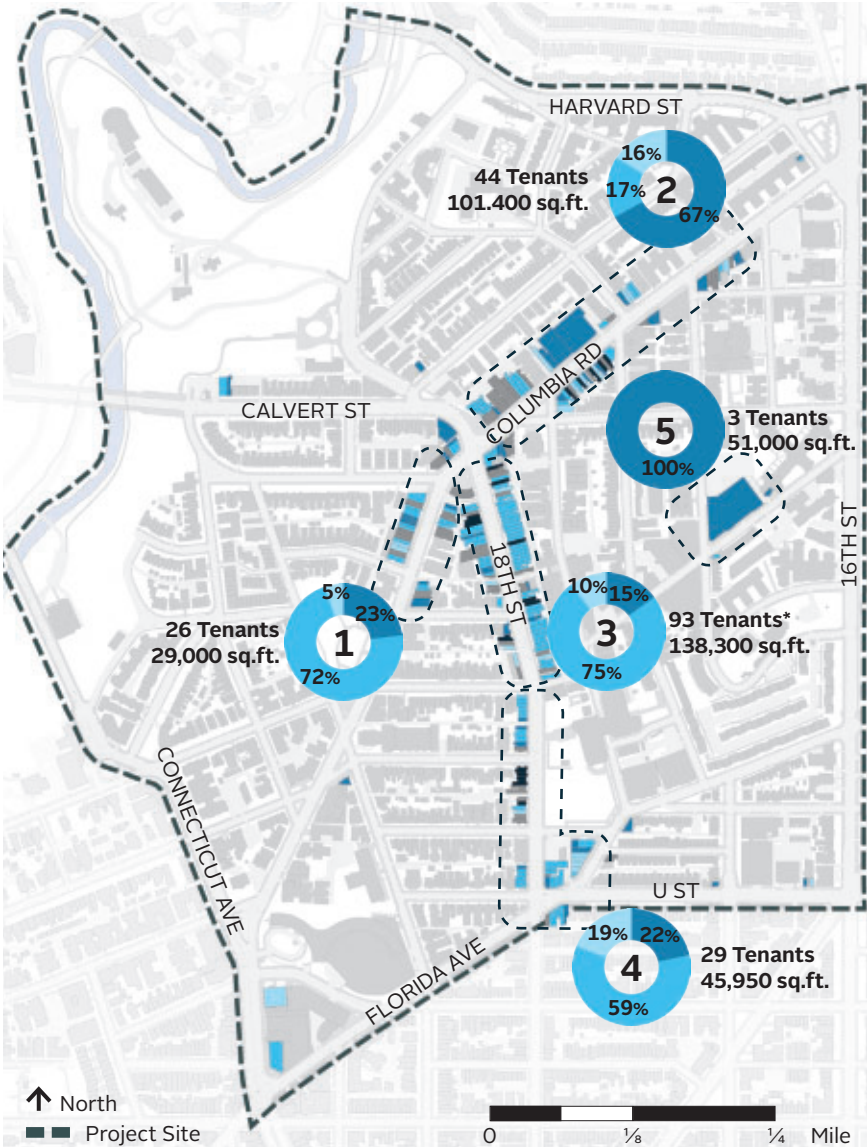
EXAMPLES IN ADAMS MORGAN: LEE JEWELRY, GAMESTOP,
MORTON FINE ART, AND FLEET FEET

Looking Ahead

RETAIL CATEGORIES & RETAIL NODES

- GAFO
- F&B
- NG&S
- Mixed
- Other/Vacant

- 1 - Columbia Rd (west of 18th St)
- 2 - Columbia Rd (east of 18th St)
- 3 - 18th St from Adams Mill to Kalorama Rd
- 4 - 18th St & Florida Ave
- 5 - Kalorama Road



* An additional 22 spaces are vacant or occupied by a non-retail use in Retail Node 3.

IMPACTS OF RECENT DDOT STREETSCAPE IMPROVEMENTS (COMPLETED 2012) ON RETAIL ENVIRONMENT

BENEFITS

1. WIDER, SAFER PEDESTRIAN ENVIRONMENT
 2. BETTER STREET AND SIDEWALK LIGHTING
 3. REINFORCEMENT OF EXISTING AND POTENTIAL RETAILERS' CONFIDENCE IN A WELL-MAINTAINED PUBLIC REALM
-

CHALLENGES

1. ADAMS MORGAN'S REGULAR CUSTOMERS PATRONIZED OTHER RETAIL STREETS DURING CONSTRUCTION AND STREET CLOSURES, WHICH CHANGED THEIR SHOPPING AND DINING PATTERNS.
2. WITH THE CLEANER AND BETTER DESIGNED SIDEWALKS, THE COMMERCIAL DISTRICT HAS LOST ITS "HUSTLE AND BUSTLE" AS WELL AS SOME OF ITS "GRIT." THIS CHANGE IS NEITHER GOOD NOR BAD, BUT IT IS DIFFERENT AND WILL REQUIRE THE RETAILERS TO MAKE ADJUSTMENTS.

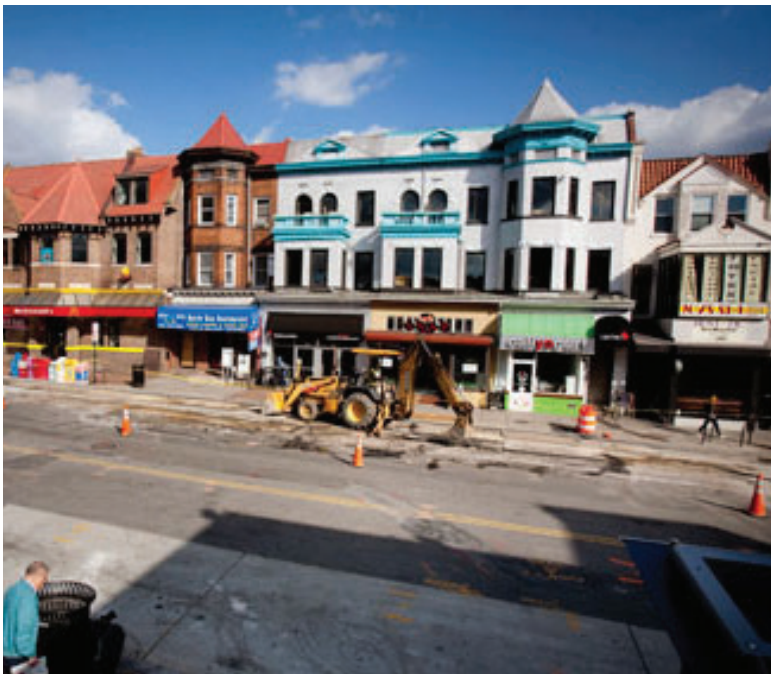


Image Source: www.washingtoncitypaper.com/blogs/housingcomplex/files/2011/11/adamsmorgan5.jpg

UNDERSTANDING WHAT ADAMS MORGAN REPRESENTS TO COMMERCIAL MARKETS

The Adams Morgan neighborhood is in a state of transition. Commercial markets (mixed-use developers, retail brokers, and retailers) are watching to see how Adams Morgan will be defined as it rebounds in the years following its streetscape construction project. Several factors work for or against Adams Morgan as a neighborhood retailers will consider for a new location:



TRAFFIC COUNTS: Retailers want enough traffic to ensure daily visibility to passing vehicles, but not so much that pedestrians feel unsafe. This amount typically falls between 5,000-22,500 average annual daily trips (AADT). Along 18th Street and Columbia Road, daily traffic counts range from 9,000-27,000 vehicles per day (2015 Traffic Metrix report).



ESTABLISHED RETAIL DISTRICT: Adams Morgan has longevity on its side. The neighborhood's commercial retail areas are widely-known and recognizable.



PRESENCE OF A BUSINESS IMPROVEMENT DISTRICT (BID): Most retailers take comfort in the fact that a third-party entity has accepted responsibility for maintenance and repair of the sidewalk and street environment outside their stores and restaurants. The BID's controls and guidance reduce the possibility that nearby retail will have a negative impact on the rest of the street.



REPUTATION FOR RESIDENT/RETAILER CONFLICT: "Business interests over residents' concerns" is an often cited phrase in Adams Morgan. Some retailers will be wary of a situation where the neighborhood and its businesses regularly take opposing positions.



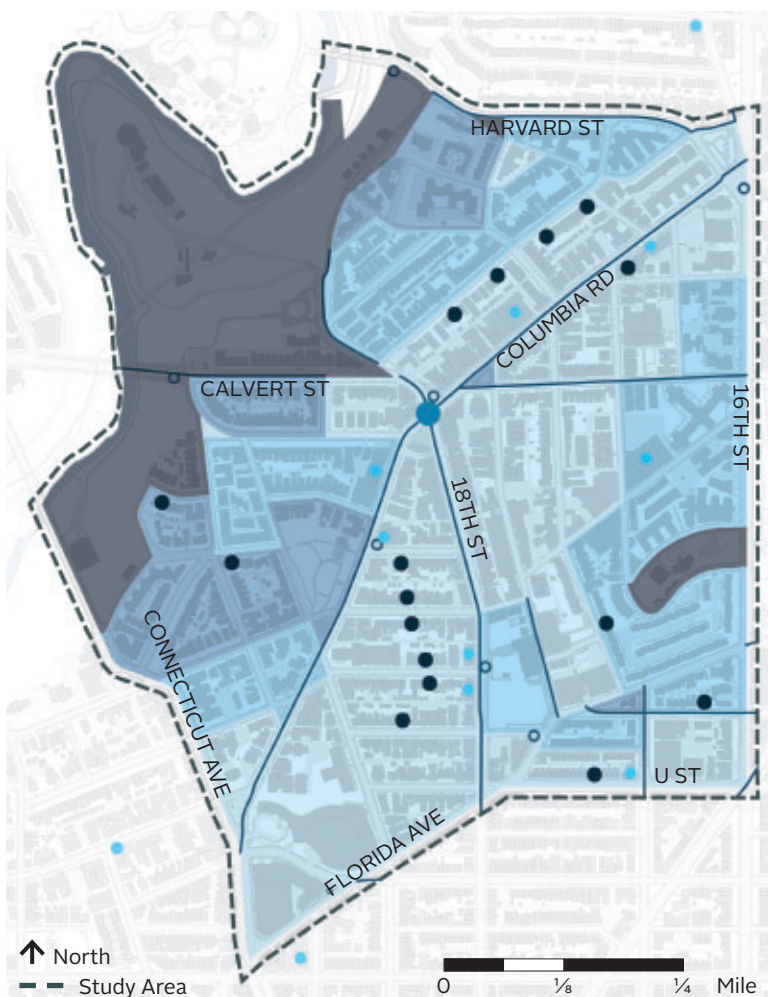
REPUTATION FOR RETAILER NUISANCE: For decades, Adams Morgan has branded a retail area for people seeking loud and sometimes irresponsible nightlife. While this identity might serve a type of F&B retailer well, it dissuades traditional retailers who might seek a more controlled environment.



LOCATION IN A HISTORIC DISTRICT: This existing condition could work for and/or against retailers in Adams Morgan. On the positive side, the historic character of the community establishes an immediate, authentic, and unifying identity for the commercial district. On the negative side, restrictions to building improvements and the age of structures might cause difficulty for businesses that need to make changes.

Sustainable Infrastructure

- Solar Panel Installation
- Farmers Market
- Grocery Store
- Capital Bikeshare Location
- Bike Lanes
- ▨ Community Gardens
- Less than 15% Tree Canopy Coverage
- 15%-25% Tree Canopy Coverage
- 25%-50% Tree Canopy Coverage
- More than 50% Tree Canopy Coverage



Sources: Data retrieved from DC Data Catalog (<http://data.dc.gov/>).

Adams Morgan is a community with a strong desire for promoting sustainable practices in their business and residential communities. The neighborhood is host to many green initiatives: individual, community, or governmental.



BIKE INFRASTRUCTURE

Local government agencies have implemented bike lanes and trails across the city over the past decade. Adams Morgan has 7 Capital Bikeshare stations in the study area.



COMMUNITY GARDENS & FOOD ACCESS

Kalorama Garden is a local community garden within the study area. With high usage and demand, there is currently a waiting list to obtain a plot. All residents are within a 5 minute walk to quality food and super markets. There are 3 major supermarkets and several smaller local grocers along the major commercial corridors.



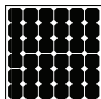
COMPOST

The residents and businesses have expressed interested in developing a local community compost program as a part of the community's waste management.



STORMWATER MANAGEMENT

With the implementation of the new DC Green Area Ratio zoning code, new construction or major renovation of multi-unit or commercial properties are required to incorporate green space on site. The goal of this code is to reduce impervious surfaces in the District for improved stormwater management. Green roofs could be one approach used to meet the Green Area Ratio requirement in Adams Morgan, and the study area already hosts several properties with green roofs.



SOLAR ENERGY

Many individual property owners are taking advantage of their solar access and have installed rooftop solar panels.



LEED CERTIFICATION

There are more than 20 LEED certified buildings or interior spaces in the Adams Morgan neighborhood.



GOVERNMENT PROPERTY MODERNIZATION

Sustainable modernization is planned by District agencies for Kalorama Park and Marie Reed Elementary, which will serve as good examples of sustainable renovation in DC.

[illegible]

1861 A. Boschke Map
Claritas Nielsen 2015 data projections.
D.C. Preservation League, EHT Tracerics Inc., and D.C. Office of Historic Preservation,
Kalorama Triangle Historic District
DC Preservation Network Database
EHT Tracerics Inc., Intensive-Level Survey of Lanier Heights, Washington, D.C.
EHT Tracerics Inc., Washington Heights Historic District
Institutional assets list on page 14 was compiled by the DC Office of Planning, with the
assistance of the Adams Morgan Business Improvement District.
Mapping data retrieved from DC Data Catalog (<http://data.dc.gov/>).
OCTO Master Address Repository, DC Office of Planning
Office of Tax and Revenue Real Property Sales ("Market" Sales)
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credits are (a) Carol M. Highsmith and (b) Ben Schumin.
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