




RETAIL ACTION ROADMAP

THE FUTURE OF THE DISTRICT OF COLUMBIA'S RETAIL MARKETS

District of Columbia Office of Planning 



Cover Photos Clockwise From Top Left:

- Chinatown - by M.V. Jantzen*
- Central 14th Street NW - by M.V. Jantzen*
- U Street NW- by M.V. Jantzen*
- Barrack's Row- by M.V. Jantzen*
- Taylor Gourmet*
- Mt. Pleasant- by M.V. Jantzen.*



Table of Contents

Introduction:

THE BIG PICTURE

1

Section One:

RETAIL DEVELOPMENT STRATEGIES

9

- 1 FILLING IN THE GAPS IN NEIGHBORHOOD MARKETS 12
- 2 CREATING NEW BUSINESS CONCENTRATIONS 16
- 3 CULTIVATING AND STRENGTHENING LOCALLY OWNED SMALL BUSINESSES 18
- 4 MARKETING THE CITY'S RETAIL OFFERINGS IN INNOVATIVE, EFFECTIVE WAYS 22

Section Two:

NEIGHBORHOOD RETAIL MARKETS

25

Section Three:

"I WANT TO..."

48

Section Four:

TOOLS AND RESOURCES

52

NEIGHBORHOOD CHARACTERISTICS

58





Raku - Dupont Circle

May 2010

***Dear Resident,
Entrepreneur,
Business Owner
or Stakeholder in the District of Columbia:***

I am very pleased to present the District of Columbia Retail Action Roadmap, a guide to the exciting retail resources that exist in our city and the many opportunities that await our neighborhoods, our residents, our small businesses, and our future investors. The strategies put forth will help us promote vibrant retail areas, expand small and local retail, provide residents and visitors with a greater selection of products and services, and recapture the more than \$1 billion of retail spending that leaks out of DC annually.

The District of Columbia offers one of the strongest retail markets in the nation. Many retailers are successfully investing in emerging corridors and bringing new retail energy to neighborhoods. The Retail Action Roadmap illustrates that traditionally underserved areas continue to have significant unfulfilled retail potential. The City hopes the Retail Action Roadmap will stimulate city agencies, non-profit and private partners to work together to ensure retail businesses grow and thrive in our neighborhoods.

The analysis behind the Retail Action Roadmap examined our retail base at both the citywide scale and through in-depth assessments of twenty neighborhood retail markets. We now have a significant index of information about retail in neighborhoods that will help us plan and mobilize. Many partners were involved in the development of the Retail Action Roadmap and Strategy. The District of Columbia Office of Planning, in collaboration with the Washington DC Economic Partnership (WDCEP) initiated the comprehensive study. Participating organizations include the Office of the Deputy Mayor for Planning and Economic Development and the Department of Small, Local and Disadvantaged Businesses. In order to complete the study the City engaged a consultant team, and throughout the process a talented advisory team made of up local professionals and citizens guided the assessments and recommendations - I extend my deep appreciation and thanks to all involved for their time and insights.

The District of Columbia has all the ingredients to be a world-class retail city with a vibrant downtown and unique neighborhoods featuring lively commercial streets. The Retail Action Roadmap provides a framework to truly meet our retail potential. I look forward to working with you to realize a vision for a vibrant city filled with opportunities for entrepreneurs and the widest possible array of retail choices.

Sincerely,

Harriet Tregoning
Director, DC Office of Planning

A Letter from Office of Planning Director Harriet Tregoning



Introduction

THE BIG PICTURE



Taylor Gourmet - H Street NE

The District of Columbia is one of the world's leading cities - the epicenter of global politics, a repository of a vast cultural heritage, and the nation's most international city. And now, for the first time in decades, the city's population is growing¹. Its job base is expanding². It has all the ingredients that make a city a great place for retail: walkable neighborhoods, disposable income, millions of tourists, top-notch public transit, vibrant cultural institutions, and a strong base of creative industries, research institutions, and government and business innovation. It's a stunning renaissance.

The District of Columbia is poised to establish a truly distinctive retail personality that fully reflects its singular position in world history, commerce, fashion, and innovation. The moment for DC to become a world-class retail city is here.

Many other leading cities have legendary shopping streets: New York's 5th Avenue, Beverly Hills' Rodeo Drive, Paris's Champs d'Élysées, Singapore's Orchard Road. Although DC has boasted prominent shopping streets from time to time, none has achieved worldwide prominence. And, while DC's neighborhoods have numerous strategic advantages over their counterparts in other cities, many of the city's neighborhoods lack the full complement of basic retail services that make a neighborhood a truly great place to live.

The DC Office of Planning, the Deputy Mayor for Planning and Economic Development, the Washington DC Economic Partnership, and the Department of Small and Local Business Development joined forces to create an ambitious and comprehensive retail strategy for the District - the **RETAIL ACTION ROADMAP**.

Along with providing more or better retail opportunities for the city's residents and visitors, the **RETAIL ACTION ROADMAP** will help position District of Columbia as one of the world's leading retail centers, with a vibrant core and network of healthy neighborhoods and retail corridors.

The **RETAIL ACTION ROADMAP** examined 15 neighborhood commercial districts in detail. The districts were selected based on one or more of three criteria:

- » Retail areas in underserved neighborhoods that can better meet the needs of neighborhood residents through sustaining or attracting strong retail concentrations and overcoming real or perceived market weaknesses.
- » Retail areas in which analysis could boost public efforts, neighborhood planning work, and investments.
- » Retail areas that are undergoing substantial change and/or transition.

¹ The City's population grew from 572,059 in 2000 to 591,833 in 2008, according to the US Census Bureau's *American Community Survey*.
² The District added 9,100 new jobs between February 2008 and February 2009 and 8,300 new jobs between February 2007 and February 2008, according to the Office of the Chief Financial Officer's *DC Economic Indicators*.

The team’s work involved five areas of focus for each neighborhood:



MARKET ANALYSIS:

Estimates of current and projected retail market demand throughout the city



ANALYSIS OF STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS:

Characteristics that influence each neighborhood’s retail performance, such as transit access, development opportunities, existing retail infrastructure, and public perception



LAND USE AND ZONING ANALYSIS:

Comparison of each neighborhood’s commercial building stock and other physical characteristics with desirable characteristics for retail development



MARKET RECOMMENDATIONS:

Suggestions about the amount, mix, and format of new retail needed in each neighborhood and about physical improvements that might boost each neighborhood’s retail performance



STRATEGIES:

Ideas for more effectively attracting and cultivating retail businesses, financing retail development, and marketing the city’s retail districts

Strategic assessments were also conducted of five neighborhoods whose retail centers are already relatively well established but are grappling with issues like security, parking, and maintaining their competitive market positions.

The total of twenty submarkets studied by the RETAIL ACTION ROADMAP are considered representative of other areas that are currently evolving or are expected to go through similar challenges or transformations. The fifteen comprehensive neighborhood retail analyses, five strategic assessments, and this summary document together form the RETAIL ACTION ROADMAP.

Throughout the research, a working group of experts in retail development, property development, and neighborhood commercial district management explored ideas with the team and offered feedback on the team’s findings.

Individual neighborhood retail submarket assessments are available at: www.planning.dc.gov

What We Found

We found that the District has almost everything needed to make it a world-class retail city, with a strong core and vibrant neighborhood commercial centers:

A STRONG, STABLE EMPLOYMENT BASE

The city's employment base grew from 650,000 to 688,000 between 2000-2006. Even during the recent economic downturn, the city has added new jobs.

HALF A MILLION DAYTIME WORKERS FROM THE SUBURBS

Almost half a million people commute into the District from the Maryland and Virginia (and even West Virginia) suburbs every day, swelling the amount of retail demand available to District businesses by hundreds of millions of dollars.

IMPRESSIVE CULTURAL AMENITIES HELP TO ATTRACT 16 MILLION VISITORS ANNUALLY³

DC ranks near the top of the list of US cities in attracting visitors.

INTERNATIONAL

With embassies and consulates from 174 nations, Washington is the US's most international city. And Washington's neighborhoods offer a wide array of events, cuisines, and international traditions, from Georgia Avenue's Caribbean Carnival to Penn Quarter's Chinese New Year's Day Parade.

ACCESSIBLE

Metro trains and buses connect all parts of the city and region. And Metro's direct connections to Ronald Reagan Washington National Airport and to Amtrak at Union Station make the District one of the best true multi-modal transit cities in the nation.

INNOVATION

With 23 universities and several hundred government and private-sector research institutions, the District is a global center for innovation in technology, policy, finance and many other disciplines.

INCOME

Growth in District residents' personal income is outpacing that of the nation as a whole. And, with transportation accounting for only 14.5 percent of District households' annual expenses, versus 17.6 percent for the nation as a whole, more disposable income is available for retail purchases and personal savings.

POPULATION GROWTH

Reversing a decades-old trend, the city's population has grown by an average of 2,200 new residents every year since 2000.

WALKABLE

More than half of DC's residents live in neighborhoods with a WalkScore of 70 or above - meaning that they have access to a range of services and to public transit. More than three-quarters live in neighborhoods with a WalkScore of 50 or above.

HISTORY

The District's history is arguably the richest in the nation. Thousands of people who have shaped American history have lived and worked here, and many of the major events in the nation's history have taken place on the city's streets and in its neighborhoods. The District continues to be a place of living history, where world events are shaped daily.

NEIGHBORHOOD TRADITIONS

Places like Eastern Market and events like the Adams Morgan Day Festival and the Caribbean Carnival help build neighborhood pride, identity, and sense of place.

OPPORTUNITIES TO GROW

Some of DC's neighborhoods are quite dense, while others are less dense, with land and buildings available for development.

³ 16.2 million people visited The District of Columbia in 2007, representing a 7 percent increase over the previous year, and spent \$5.54 billion here, according to *Destination DC. ForbesTraveler.com*, citing information from the National Park Service, places the numbers even higher, estimating that 24 million people visited the National Mall and Memorial Parks in 2007.

But...

We also found some obstacles and challenges in ramping up the performance of the District's retail centers:

COMPETITION FROM THE SUBURBS

District residents spent \$1.1 billion on retail goods and services outside the city in 2007⁴. Most of this went to major retail centers in the Maryland and Virginia suburbs - Recapturing a chunk of this sales leakage is one of the **Retail Action Roadmap's** major objectives.

HIGH LAND VALUES

Many of the factors that make the District a ripe market for retail development also make its land and buildings expensive. The Retail Action Roadmap offers a guide to help assemble land for retail development and to operate retail businesses profitably.

RENT-TO-SALES RATIOS

For a variety of reasons, small businesses often struggle to generate the sales levels needed to cover their rent, particularly in vibrant, popular neighborhoods. The Retail Action Roadmap will help small businesses boost their sales.

CAPITAL

Capital for business development and expansion - particularly for independently owned businesses - is often in short supply, particularly in neighborhoods with relatively low median household incomes and in projects whose lenders require the capital reserves that chain retailers can offer. The **Retail Action Roadmap** will help make capital available for strategic retail projects.

MISMATCHES BETWEEN NEIGHBORHOOD RETAIL SUPPLY & DEMAND

Although the District's residents, visitors, and workers have ample retail buying power, some of the city's neighborhoods lack some of the goods and services that residents need, while other neighborhoods have more existing and planned retail space than residents and visitors can realistically support. The Retail Action Roadmap will help adjust retail supply and demand.

REGULATORY HURDLES

Well-intended regulations are sometimes not as applicable to small businesses in neighborhood commercial districts as they are to large businesses or businesses in single-purpose commercial centers, and complying with them can be needlessly costly and time-consuming. The Retail Action Roadmap will seek to help transform regulatory hurdles that inadvertently restrict retail development.

PERCEIVED MARKET WEAKNESSES

The city's less affluent neighborhoods contain considerably more retail demand than traditional market analyses suggest. But the perception of market weakness often keeps businesses away - particularly national chain retailers. The Retail Action Roadmap will provide realistic market information to retailers, retail developers, and their investors.

The biggest obstacle we found was simply the lack of a comprehensive, citywide retail development strategy.

The **RETAIL ACTION ROADMAP** fills that critical need.

The **RETAIL ACTION ROADMAP** is a bold, ambitious plan for filling missing gaps, cultivating retail innovation, and stimulating retail growth. It strengthens neighborhood retail offerings, creates world-class retail clusters, and connects the city's shopping hubs.

The **RETAIL ACTION ROADMAP** is intended for everyone interested in retail development in the District: retailers, developers, neighborhood organizations, property owners, brokers, property managers, policy planners, and residents. We invite you to participate in making DC one of the world's leading retail cities and a great place to live, work, and visit.

⁴ The \$1.1 billion spent by residents outside the city is partially offset by \$771 million spent by non-District residents (both workers commuting in from the suburbs and also tourists), resulting in an estimated net loss of \$329 million in sales leakage



A close-up photograph of a person's hand holding a blue-handled tool against a wall made of horizontal wooden planks. The person is wearing a plaid shirt. The background is a light blue gradient.

Section One

RETAIL DEVELOPMENT STRATEGIES

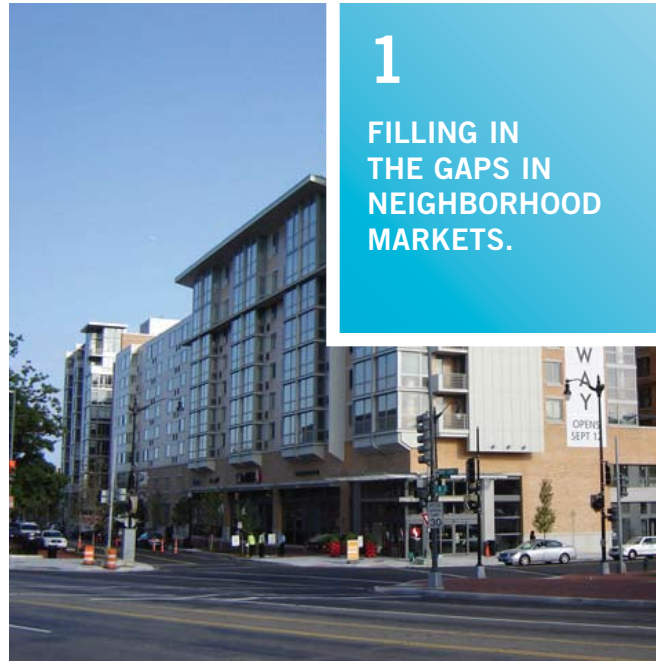
Ben's Chili Bowl - U Street Corridor

The

RETAIL ACTION ROADMAP

contains a comprehensive arsenal of resources and actions to transform the District's commercial districts, including reviewing regulatory and financial incentives, marketing initiatives, hands-on technical assistance, and business development capital. Some of the actions it recommends can be put in place by City agencies; some by nonprofit organizations; some by property owners and developers; some by business owners themselves. Some of its actions will benefit commercial districts throughout the city; others are targeted at specific neighborhoods. Some involve regulatory action; others are approaches that businesses might choose to adopt.

The
**RETAIL ACTION
ROADMAP**
deploys this
collection of tools
through four major
objectives:



1

FILLING IN
THE GAPS IN
NEIGHBORHOOD
MARKETS.



2

CREATING NEW
BUSINESS
CONCENTRATIONS.



3

CULTIVATING AND
STRENGTHENING
LOCALLY
OWNED SMALL
BUSINESSES.



4

MARKETING THE
CITY'S RETAIL
OFFERINGS IN
INNOVATIVE,
EFFECTIVE WAYS.

1 FILLING IN THE GAPS IN NEIGHBORHOOD MARKETS.

In total, District of Columbia residents spent about \$1 billion of their retail and restaurant dollars outside the District in 2007. Some of DC's neighborhoods are significantly underserved and leak tremendous amounts of retail dollars. Anacostia's residents, for example, spent approximately \$77.8 million in retail businesses and restaurants in 2007, but the neighborhood's businesses captured only \$32.4 million of those purchases - just slightly more than 41 percent. Anacostia residents are buying the rest of their goods and services somewhere else - in the Maryland and Virginia suburbs, in particular, but also in bricks-and-mortar and virtual businesses farther away. The gap between

the amounts that DC neighborhood residents spent in 2007 and that their neighborhoods captured that year ranges from \$23.8 million in the South Capitol Street neighborhood to a whopping \$179 million in the Convention Center/Shaw neighborhood.

In practice, it is impossible for the businesses in any neighborhood to capture 100 percent of the neighborhood's residents' retail purchases. But many, if not most, of the purchases residents make for basic retail goods and services - groceries, hardware, household supplies, fresh flowers, fast food, laundry services - can be funneled back into the city's neighborhoods.



Dupont Circle FRESHFARM Market - Dupont Circle



Café Berlin - Capitol Hill

The **RETAIL ACTION ROADMAP** will fill those gaps, providing a guide for increasing the retail offerings in underserved neighborhoods and for recapturing a significant share of the sales leaking into the Maryland and Virginia suburbs and beyond. Some of the tools and resources needed to do so are already in place, but the **RETAIL ACTION ROADMAP** recommends some additional tools and tactics, such as:

Help encourage mobile or pop-up retail units. Mobile retail includes vending carts, vans, trucks, or trailers that can move from place to place. Pop-up stores emerge in one location for a few days or more. Mobile and pop-up retail help bring products and services to neighborhoods where there might not be enough market demand to support an entire store and help new stores establish themselves in a start-up space. Mobile or pop-up retail also offers market visibility to build demand for new products or seasonal merchandise. The City can help facilitate mobile or pop-up retail units by adapting occupancy and permitting regulations to fit their specific, temporary needs and by implementing new vending regulations. This strategy will also help fill commercial buildings or storefronts during periods of vacancy by offering property owners flexible, short-term rentals.

Investigate a pilot program to help businesses offer deliveries. Delivery offers another channel for customers to easily buy from neighborhood businesses. It may also allow businesses to operate without a storefront presence or from locations on secondary, rather than main commercial streets. Technical assistance to businesses can help

managers understand if delivery source is a viable option to enhance sales and assist them in adapting marketing and operations.

Explore retail investment zones for underserved neighborhoods as a means to attract goods & services. The focus of a retail investment zone in underserved neighborhoods is to attract the required retail categories to meet trade area demand as well as balance the corridor merchandising mix. Retail zones assist new retailers to grow sales and generate net income sufficient to pay off start-up expenses and establish the cash reserves needed to finance new inventory purchases. Existing Enterprise Zone incentives or other special tax or funding incentives could be coupled with flexible, streamlined permitting processes to attract businesses to the neighborhoods most in need of basic retail goods and services.

Help establish retail in underserved areas through tools such as a nonprofit venture fund. Through convening and working with representatives of area foundations and investors a nonprofit fund

could emerge. Funds can be directed to capitalize retail businesses in strategic areas or priority categories. Examples include the Boston Community Venture Fund and Pacific Community Ventures. These funders identify where business needs lie and key investment opportunities.

Investigate effective commercial corridor management tools. To ensure vibrant retail corridors, a commercial district needs a specific business game plan with a leasing agent, developer, and business association or other entity guiding business mix, leasing and location decision. Investigating optimum structures to manage those processes is a first step to implementing and supporting entities to oversee retail mix management in DC neighborhoods.

Help entrepreneurs upgrade vacant or underused retail spaces. Entrepreneurs are often challenged with the poor condition of interior and exterior retail space. Programs could be leveraged to offer incentives to upgrade both the facade and interior fire and safety elements. For example, some states offer income tax credits of 50 percent of the cost of elevators and sprinkler systems, with a cap of \$25,000 per project. Those credits can be claimed by a property owner or lessee, and they can be exchanged for cash at participating banks or used to adjust the rate or term of the mortgage or loan.

Continue small business technical assistance related to merchandising. Small and local businesses in underserved areas require assistance to successfully react to changing markets. Targeted technical assistance on topics such as improving merchandising, operations management, and marketing will help small businesses to remain competitive.

Modify current zoning that requires ground-floor retail in mixed-use projects. Including ground floor retail in mixed use developments is an important tool to intensify retail around public transit nodes. It is not required in some residential areas that might detract retail away from identified retail nodes, or where population does not yet generate demand for more retail.

Continue to improve business permitting processes and consider fast-tracking in priority areas. Build on recent efforts to improve the business permitting and licensing frameworks in DC. Explore opportunities to enhance regulatory efficiencies for businesses opening or expanding in priority, underserved neighborhoods.

Seek to co-locate and incubate new businesses in low-cost, high-visibility locations. Co-location, or multiple retailers grouped in a single space, is often a great support framework for start up businesses or small businesses. Sharing space is cost effective, helps incubate businesses, and can also serve as a ladder for entrepreneurs to grow into larger storefronts along a commercial corridor. A co-location lab can be created through taking larger spaces and dividing into smaller, gallery or arcade-types spaces appropriate to businesses that are just launching their business idea. Existing vacant space in many emerging corridors could be ideal locations for incubation and co-location.

Create an enhanced retail space finder database. Focus on components that will serve both smaller and larger retailers and fill vacant commercial spaces. The space finder should be searchable by crucial themes such as neighborhood, square footage, rent, distance to transit, and also if space is available for temporary or creative uses.



2 CREATING NEW BUSINESS CONCENTRATIONS.



Busboys and Poets - U Street Corridor

The District of Columbia is world-renowned for several of its *non-retail* business concentrations - lobbyists and defense industry contractors, for example. But, the city has no *retail* concentrations that are renowned in the way that New York is renowned for its concentration of electronics stores, for example, or that Milan is renowned for its concentration of high-fashion apparel stores.

Because of its fortunate status as a national and global center of international politics, policy research, defense research, and technology innovation, the District has several tantalizing opportunities to create one or more unique retail concentrations that build on these strengths. There are three particular concentrations that **THE RETAIL ACTION ROADMAP** recommends:



Cowgirl Creamery - Downtown

Explore the potential for an international market or retail center.

Work with international organizations and communities to determine the viability of an international market or specialized retail center. A market or center could focus on artisan products or unique shopping offerings from throughout the world. The center could be developed in partnership with embassies, travel associations, marketing agencies from other nations with representation in the District, or non-profit organizations that work with ethnic groups or international populations in DC.

Seed creative business corridors. Arts retail, such as galleries, clustered with cultural offerings, such as theatres, can make for a vibrant neighborhood destination. DC's creative economy research revealed a base of creative industries in the city that already anchor several retail districts, and could provide the foundation for additional creative and retail clusters, such as culinary and media arts, leveraging the creative assets of a neighborhood or a commercial corridor. For example, the expansion of broadband can encourage more daytime digital arts and

media employment, especially in corridors with second and third floor commercial spaces and considerable vacancy.

Support green business clusters and greening retail businesses.

The District has an opportunity to capitalize on green building legislation, the District's Green Jobs initiative, federal agency and university research, and a surge of small green businesses to support green business clusters. These include businesses that operate in a sustainable way, sell or produce green products, or are involved in recycling, repair, and overall conservation. Identifying a retail business that meets green performance standards would allow green businesses to use logos promoting its green status and to be included in larger marketing initiatives. Small retail and restaurant businesses would greatly benefit from technical assistance and guidance to increase efficiency through going green. Also, helping green businesses to form could be accomplished through incubator or co-location space in identified 'green' corridors.



Mr. Henry's Restaurant - Capitol Hill

3 CULTIVATING AND STRENGTHENING LOCALLY OWNED SMALL BUSINESSES.

More than almost any other factor, locally owned small businesses help define the personalities of the neighborhoods in which they operate. District businesses like Ben's Chili Bowl (in operation for more than 50 years), The Guitar Shop (90 years), Mr. Henry's (40 years), Lambda Rising (35 years), and Politics and Prose (25 years), along with relative newcomers like 14th and U Streets' Muleh and Lettie Gooch and Logan Circle's Logan Hardware, have become strong community anchors and points of pride. But their value is more than merely sentimental: locally owned businesses are almost always better able than national chains to adapt their products and services to meet neighborhood needs; a higher percentage of their net profits remain in the community; they participate in and support neighborhood events and institutions; and they create an indelible image that helps define the public's perception of the neighborhood.

Locally owned small businesses face significant challenges, though. It often takes several years to establish the market visibility and customer base needed to become profitable, but small businesses often lack the capitalization needed to sustain those crucial first few years of operation. Commercial agreements are often designed with large, 'formula' retailers in mind and are inadvertently burdensome and disproportionately costly for small retailers. Lenders often require developers of mixed-use projects to pre-lease space to 'national credit tenants' that have adequate capital reserves to guarantee occupancy for a certain number of years. And, for those small business owners who also own their buildings and have been in business for many years, at some point it can become more profitable to cash in on the appreciation in property value by closing the business and selling the building than to continue operating there.



Chateau Animaux - Capitol Hill



The **RETAIL ACTION ROADMAP** will help entrepreneurs launch new retail businesses and help locally owned businesses strike a balance between commercial activity and rent levels so that sales can support market-rate rents within a year or two.

There are already a number of good programs and services available in the District to help small businesses grow. The **RETAIL ACTION ROADMAP** recommends tighter coordination among many of these programs, with neighborhood-by-neighborhood business mix plans and increased emphasis on actively seeking out and cultivating small business entrepreneurs and investors. In addition, the **RETAIL ACTION ROADMAP** recommends several new resources and approaches, including:

Incubate new product lines within existing businesses. Help boost sales in existing stores while also building market visibility and demand for new products that can then be spun off into new businesses. Through expanded and intensified instruction and working with businesses one-on-one, owners and managers can learn efficient tactics for expanding their market through new products.

Seek opportunities for small start-ups to share in storage and cooperative buying. Because of increasing rents for premium space, many businesses have a difficult time maintaining inventory or supplies

within their place of business. Retailers located in close proximity can group together to co-locate storage in a convenient place that may be off of the commercial strip and more affordable. Similarly, small retailers that buy similar products (for example, produce for restaurants) can purchase cooperatively in bulk to obtain optimum pricing and delivery.

Help small and locally owned businesses develop new distribution channels. New distribution channels can include online storefronts, neighborhood deliveries, mobile retail units, wholesale sales to other retail businesses, and "store-in-store" sales within other businesses.

Assisting retailers to develop these innovative and cost-effective options to reach more customers could include specific guidelines and technical assistance on how to set up and manage an online storefront (web business development) or provide delivery to customers. Generating business-to-business sales requires establishing networking opportunities and helping businesses reach standards for wholesale sales and procurement. Businesses can prepare for and implement store-in-store sales through managing agreements among sellers to offer new products in an existing store, including placement, pricing, and promotion.

Target large-format regional retail development to strategic locations in underserved areas. Implement or support programs to draw regional retailers and retail centers to areas that can both sustain large format stores and are most in need of retail opportunities. These dense, multi-use areas can serve residents and attract customers, and in turn support existing small and independently owned businesses. Support could include commercial corridor management to oversee business mix and business attraction activities, and informational services about emerging areas and DC business support.

Investigate a lease guarantee program. Lease guarantee programs provide assurance to developers and their lenders/investors that a lease with small or local businesses will be as secure as those made to national chains. This helps level the playing field between small businesses and national retailers, and ensures small and local businesses are in the running for new commercial space. A guarantee program covers a majority of the value of leases to small businesses should they default, with businesses required to security the remaining value via collateral or personal loan guarantees.

Explore programs to help small business owners own the spaces in which they operate. Retail condominium programs help prevent displacement of small businesses as neighborhoods develop because they offer the opportunity to purchase smaller, individual spaces. As

Planned Unit Developments are created in emerging or transitioning neighborhoods, commercial space for priority retail businesses can be identified for retail condominiums or conversion of existing retail space to retail condominiums. Other assistance could include funding to cover the gap between the amount of the mortgage and the size of the mortgage the businesses' current rent payments would support, or funding to buy down mortgage interest rates. These retail ownership incentives will prevent displacement and could be tied to performance benchmarks outlined in a business plan.

Assist small businesses to expand into targeted neighborhoods through a growth fund. Federal and private funding can be combined and leveraged to provide loans or grants to profitable, existing businesses or start-ups interested in expanding into neighborhoods targeted for particular retail categories. These funds often offer bonus incentives to businesses that reach quarterly net income targets established in their business plans. Winston-Salem, North Carolina's Restaurant Row Loan Program, for example, blended federal and private financing to provide subordinated loans to qualified restaurateurs willing to open in a targeted section of downtown Winston-Salem, with repayment deferred for two years to help new restaurants get established. A robust business attraction and assistance program is important for a growth fund to successfully bring in the best business mix.

Support and expand internship programs in the retail sector. Internships and in-store training across a wide range of retail professions will help create a pool of qualified professionals to build the retail industry in the District. Large retailers, like Macy's, often offer formal internship programs across the retail and business spectrum. Those can be linked with DC based universities or high schools, particularly those with programs including business, hospitality, the culinary arts and more. High School youth can also be linked with smaller retailers who can offer exposure to owning and operating a small business.

Recognize and promote heritage businesses. Heritage businesses meet certain criteria such as benchmark years, providing services that preserve or promote a heritage skill, or playing a unique role in the history of the neighborhood, the District or the nation. Public recognition to locally owned heritage businesses helps to ensure they maintain competitive and continue to offer their unique services or products. Other specialized assistance for designated businesses include advanced business planning, succession planning, as well as special marketing assistance.

Facilitate matching between entrepreneurs and investors. There are more opportunities to bring entrepreneurs and investors together to launch new and expansion businesses. Investors provide equity and expertise to retail entrepreneurs. Investors could maintain their ownership interest or, if they prefer, offer entrepreneurs the option of purchasing their equity share over time. Innovations in technology can facilitate matching, as well as new information about emerging neighborhoods with unmet retail demand.

Help identify capital for priority businesses through cooperatives or equity investment groups. Through establishing buy-in from different types of investors, from neighborhood residents to foundations to local banks, several investment resources could emerge. Equity investment groups can come together to pool their financial resources into healthy retail investments, particularly in underserved areas with unmet demand. Or, stock companies can offer funding to priority retail businesses. Cooperatives, for example neighborhood grocery co-ops, could be created and operated in areas that currently lack full-scale grocery stores. A joint effort by the private sector, business development organizations, and the public sector can help form an appropriate capital framework that is currently lacking.



Colonel Brooks' Tavern - Brookland

4 MARKETING THE CITY'S RETAIL OFFERINGS IN INNOVATIVE, EFFECTIVE WAYS.

A handful of the District's neighborhoods are widely known for their distinctive retail personalities. Georgetown, Adams Morgan, Cleveland Park, 14th and U, Barracks Row - mention any these neighborhood retail centers, and, for most area residents, a vivid image immediately comes to mind of its businesses, its buildings, and its personality.

But many of the city's neighborhood commercial districts are unknown to most area residents and to virtually all visitors - and, in some instances, public perception is overtly negative.

One of the greatest challenges in boosting the economic performance of a neighborhood commercial district is changing the way that people perceive the district, a process that almost always happens through scores of small actions that together, over time, replace negative images with positive ones and create a distinctive impression of the district. From a marketing perspective, this transformation is invaluable.



XY Decor - Georgetown



Brookland

One of the **RETAIL ACTION ROADMAP'S** objectives is therefore to create distinctive retail marketing identities for each of the city's neighborhood commercial districts - and to create a strong, dynamic, and cohesive overall retail identity for the District as a whole. Many of the tools are already in place but need to be more tightly coordinated. In addition, the **RETAIL ACTION ROADMAP** will use a few new tools, including:

Develop a dynamic citywide retail website. A citywide retail store finder will make it easy for residents and visitors to find retail businesses, promote each neighborhood's distinctive retail personality, and generate buzz for the District's neighborhood commercial centers. The website should be searchable by neighborhood, Metro line, retail category, and experience. The website could also tie in locally owned and small businesses, heritage businesses and green business to offer special recognition and niche shopping.

Consider a graphic identity system for each neighborhood retail district. A graphic identity system includes creating a unique logo for each neighborhood retail corridors that conveys something recognizable, memorable and unique. The system interlinks with graphics from all other District retail corridors, helping symbolically connect the city's neighborhoods. Graphics should be used consistently in signs, on the

citywide retail website, and in all other relevant marketing material for branding recognition. The symbols can be launched through and support neighborhood festivals and signature events.

Develop signature promotional events for neighborhoods and market collectively. Unique neighborhood events and festivals attract people to commercial districts, create an experience specific to each neighborhood, and offer positive economic impacts. Neighborhood events should draw on neighborhood traditions or strengths, reinforce a positive public identity for the neighborhood, and be inviting to all area residents and visitors. The signature events should be presented as a collection across the city and marketed as a collective whole. To support festival and neighborhood events the regulatory process should be reviewed to ensure an efficient and supportive system, and a central entity could help program and manage festivals.

Enliven storefront windows. Create a stimulating street experience that encourages pedestrian movement through tactics such as window display competitions, interactive video installations, or active staging. Examples of staged storefronts include puppet shows, local celebrities having lunch, or artists producing works in the windows. Other options, particularly for vacant storefronts, include art in windows or unique, faux facades that offer ideas of what the transformed storefront could be.

Encourage participation in programs to connect consumers to locally owned businesses. A two-fold program should both educate shoppers about the benefits of supporting locally owned businesses and also promote where those businesses are located. The national Business Alliance for Local Living Economies already has a 'buy-local' campaign operating in a few neighborhoods in the District of Columbia. A buy local campaign can be expanded throughout the city and link into the citywide retail website.

Market the District of Columbia as a great place to start a new business. Ensure that the City's marketing, business development and entrepreneurial development programs are connected, well organized and heavily promoted. This includes a larger campaign to highlight emerging and dynamic DC markets to attract the right mix of retailers to fill vacant space, revitalize neighborhoods, and create jobs for residents. These efforts should include hands-on retention and attraction efforts, a clear list of assistance available by area, and a retail space search website.

Coordinate business development and support programs. Non-profit organizations, public agencies, business support organizations and private partners together offer a plethora of business support services in the District of Columbia. Retail and commercial corridor development can be enhanced by ensuring there is no duplication of services, that gaps are addressed through proactive initiatives, and that available services are clearly marketed. Enhanced coordination can start through a review of the roles public and private partners play in small business and retail development, and identifying how they could more effectively work together.



Lettie Gooch Boutique - U Street Corridor



Section Two

NEIGHBORHOOD RETAIL MARKETS

S & S Rapid Shoe Rebuilders - H Street NE

The Neighborhoods

DC's neighborhoods offer a wide variety of retail experiences, from quiet neighborhoods to vibrant entertainment districts. The District's commercial centers include community-serving shopping streets, regional retail attractions, long established retail destinations, one-of-a-kind locally owned businesses, international brands, and much more.

Each of the District's neighborhood commercial centers has a retail personality as distinctive as that of the neighborhood itself – its residents, its history, its traditions, its buildings. The **RETAIL ACTION ROADMAP** taps into these special characteristics while also building on each neighborhood's strategic advantages – access, visibility, building size, strong retail clusters already in place – to identify new retail development opportunities. The **RETAIL ACTION ROADMAP** utilizes the full arsenal of tools outlined in the previous section, adapted to each neighborhood's specific needs, to attract, strengthen, and expand its retail foundation.

Full neighborhood retail submarket assessments and demand analysis are available at: www.planning.dc.gov

Neighborhood retail districts can be broadly broken up into four categories to assist retailers, city agencies and non-profit organizations select and apply the right mix of strategies and resources.

Emerging areas have only begun to understand their potential as a commercial district, and may be revitalizing after years of disinvestment. They are primarily neighborhood serving. Ideal strategies for emerging submarkets focus on improving the physical condition of buildings and infrastructure, enhanced streetscape, assisting existing businesses to upgrade product offerings and business models, and working to fill vacant spaces with neighborhood-serving businesses through targeted attraction.

Transitioning submarkets are changing from one shopping pattern to another. For example neighborhoods that are transforming from neighborhood shopping serving residents to a higher concentration of office workers, or neighborhoods that are adjusting to significant market changes. Businesses in these submarkets require assistance to reposition to meet changing demand while continuing to serve long-time customers, expansion of product lines and distribution channels. Retail corridors must reposition and focus on innovative branding efforts, identify and fill gaps in retail demand, perhaps through pop-up or mobile retail.

High Growth areas are becoming a concentration of residential, office, retail and entertainment uses in a very short period of time. They may be establishing unique market niches. Strategies for high growth areas should include a broad mix to both support long-established businesses that may be serving a local neighborhood, while fostering inclusion of new retailers with a regional draw. Opportunities exist to match entrepreneurs with investors, fill space with creative uses, and brand areas through innovative marketing.

Stabilized submarkets offer a viable and vital mix of shops serving the neighborhood and visitors. They may be experiencing market changes and rent increases that require flexibility and creativity on the part of businesses and commercial corridor management. Business support strategies include store ownership and retail condominiums, achieving an optimum merchandising mix through broad stakeholder participation and corridor management, establishing distinctive retail identities and dynamic branding.

Adams Morgan / 18th Street | p.30

Anacostia | p.31

Benning Road / Minnesota Avenue | p.32

New York Avenue / Bladensburg Road | p.33

Brookland | p.34

Capitol Riverfront | p.35

Central 14th Street NW | p.36

Downtown / Penn Quarter / East End | p.37

Dupont Circle | p.38

Friendship Heights | p.39

Georgia Avenue / Gateway | p.40

Georgia Avenue / Petworth | p.41

H Street NE | p.42

Kennedy Street NW | p.43

Nannie Helen Burroughs & Division Aves | p.44

North Capitol Street | p.45

Pennsylvania Avenue SE | p.46

Shaw / Convention Center | p.47

South Capitol Street | p.48

Tenleytown | p.49

ADAMS MORGAN / 18th STREET



Retail Market Category: Stabilized Market
Retail Market Study Area: 18th Street NW & Columbia Road

Named for two neighborhood elementary schools, Adams Morgan has served as a gateway for new immigrants for decades, evolving into a thriving, energetic business district reflecting the cultural diversity of its residents. The district's lively restaurant and bar scene coexists with a strong cluster of neighborhood-serving businesses, including clothing stores, hardware stores, groceries, hair salons, and yoga studios. Most of the district's businesses are small and independently owned. In many ways, the commercial district functions as a *de facto* small business incubator from which many new businesses have been launched.

STRATEGIC ADVANTAGES:

- *The district's nightlife businesses are quite successful, but the district needs daytime trade, as well, to better meet neighborhood residents' needs.*
- *Its eclectic, diverse businesses and its proximity to Dupont Circle, Rock Creek Park, and Kalorama Park make Adams Morgan a popular residential neighborhood.*
- *Its grocery stores and small, neighborhood-serving businesses make the neighborhood largely self-sustaining.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *Small, neighborhood-serving convenience retail and service businesses.*
- ✓ *Restaurants that serve neighborhood residents, workers, and visitors.*
- ✓ *Specialty businesses that attract daytime shoppers, such as repair services, vintage clothing, and sports and fitness clothing and equipment.*



ANACOSTIA



Retail Market Category: High Growth Market + Transitioning Market
Retail Market Study Area: Martin Luther King Jr. Avenue & Good Hope Road SE

Located just east of the Anacostia and Potomac Rivers, Anacostia is one of DC's most historic neighborhoods and serves as a key gateway into the District from the southeast. This district has some of the city's largest undeveloped waterfront parcels - and also some of the city's most ambitious development plans, including the Department of Homeland Security's planned move to St. Elizabeth's (a historic hospital complex), and a proposed project that will bring 3,200 new residential units, 1.5 million square feet of offices, 405,000 square feet of retail space, and 224,000 square feet of hotel space to Poplar Point, at a prominent bend in the Anacostia River across from the Navy Yard. The neighborhood's main commercial streets, Martin Luther King, Jr. Avenue and Good Hope Road, are lined with small, older commercial buildings. Their businesses are now beginning to benefit from the district's new office development, providing them with a growing stream of daytime traffic.

STRATEGIC ADVANTAGES:

- *The district's two major commercial streets, Martin Luther King Jr. Avenue and Good Hope Road, have a number of vacancies and therefore numerous opportunities for individual businesses, for some property assembly, and for infill development.*
- *The neighborhood has a number of vacant or underused warehouses and industrial buildings that could be used for small-scale industries, wholesaling, distribution, and other business activities that support retail. Some could also be used for large-format retail.*
- *New projects proposed and underway will bring thousands of new workers and residents to the neighborhood, dramatically growing the neighborhood's retail buying power.*
- *The modest scale and low rents of the district's current retail buildings are ideal for incubating small, locally owned businesses.*
- *There are good opportunities for transit-oriented development around the Anacostia Metro station.*
- *The district has a good framework for new commercial development, with well-proportioned streets and blocks.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *Grocery and food stores*
- ✓ *Restaurants serving daytime workers, neighborhood residents, and visitors to the neighborhood's historic sites and other attractions*
- ✓ *Businesses that provide entertainment and recreation, such as movies, bowling, and entertainment-focused restaurants*
- ✓ *Destination businesses focusing on African American heritage, such as art, fabric, specialty foods, books, and collectibles*



BENNING ROAD / MINNESOTA AVENUE



Retail Market Category: Emerging Market
 Retail Market Study Area: **Node 1** - Minnesota Avenue from Grant Street to East Capitol; **Node 2** - Benning Road & East Capital Street SE

With excellent access to two Metro stations and several major streets running through it (East Capitol Street, Minnesota Avenue, and Benning Road), the Benning Road/Minnesota Avenue neighborhood offers many of the ingredients needed for a regionally-serving retail center offering moderate prices. The East River Park shopping center, at the intersection of Minnesota and Benning, currently supplies most of the neighborhood's retail needs, but there is considerable potential for additional retail development. The neighborhood has some challenges: railroad tracks separate a large chunk of the neighborhood from the Anacostia River, the streetscape has several large gaps, and resident buying power is relatively modest. But the neighborhood is experiencing significant redevelopment and has the potential to become even more robust, with parcels large enough to accommodate regionally-serving retailers.

STRATEGIC ADVANTAGES:

- A new building for the District's Office of Employment Services being built near the Minnesota Avenue Metro station, at the north end of the commercial district, will bring new daytime workers and shoppers.
- The proposed Parkside development will bring 1,500 new housing units to the neighborhood, with additional development projects contributing an additional 350 units.
- The neighborhood's main commercial streets are also major thoroughfares, bringing thousands of people through the district every day.
- The 55-64 age cohort is expected to grow over the next few years, increasing demand for products and services appealing to "empty nesters".

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ Neighborhood-serving grocery and food stores
- ✓ Neighborhood-serving restaurants
- ✓ Regionally-serving inexpensive clothing and shoes
- ✓ Regionally-serving inexpensive furniture, home furnishings, and housewares



NEW YORK AVENUE / BLADENSBURG ROAD



Retail Market Category: Emerging Market
 Retail Market Study Area: Triangle area formed by the intersections of New York Avenue NE, Bladensburg Road NE, & Montana Avenue NE

Hundreds of thousands of visitors enter the District of Columbia each year along New York Avenue, a segment of US Rt. 50 (which runs across the fifty states, from Ocean City, Maryland to Sacramento, California). Once a rough entrance, with stretches of undeveloped, underused, or vacant property, significant investment in streetscape and property improvements over the past decade have improved New York Avenue's appearance. With no nearby Metro station, businesses along New York Avenue are largely auto-oriented. The commercial triangle framed by New York Avenue, Bladensburg Road, and Montana Avenue currently consists primarily of auto shops and junkyards, but much of it will be redeveloped as Arbor Place, which will add approximately 3,700 residential units and 130,000 square feet of grocery-anchored ground-floor retail to the neighborhood.

STRATEGIC ADVANTAGES:

- *Two large development projects - Arbor Place and Arboretum Place - are expected to add close to 10,000 new residents over the next five years.*
- *The National Arboretum, a green oasis, attracts tens of thousands of visitors annually and suggests opportunities to develop specialty horticultural businesses and garden centers.*
- *Recently developed offices, and several existing and planned hotels, augment resident retail market demand.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *Large-scale retail (targeted specifically for the historic Hecht Co. art deco warehouse).*
- ✓ *Restaurants (both quick-service and sit-down).*



BROOKLAND



Retail Market Category: Transitioning Market
Retail Market Study Area: 12th Street NE and Monroe Street NE

Brookland is a lively commercial district with a variety of restaurants, cafes, boutique shops, and neighborhood services on and around 12th Street NE, the district's main retail street, and Monroe and Michigan Streets, NE, strong secondary commercial corridors. The surrounding middle-class residential areas have picturesque single-family homes and woodsy open spaces. Nearby Trinity and Catholic Universities lend a strong student presence to the area, and several medical institutions provide a large employment base. Directly outside the commercial core, major tourist attractions like the Basilica of the National Shrine of the Immaculate Conception, the nation's largest Catholic church, draw over half a million visitors annually. The commercial district is served by the Brookland-CUA Metro station.

STRATEGIC ADVANTAGES:

- *The neighborhood has a relatively high percentage of small, independently owned businesses and small-scale historic commercial buildings, giving Brookland an eclectic, artsy character that has been enhanced by the recent opening of the Yes! Organic grocery store on 12th Street.*
- *Monroe Street's large blocks, strong visibility, and close proximity to the Brookland-CUA Metro station make it ideal for high-density transit-oriented mixed-use development, with lot depths that could support retail anchors not as easily accommodated in many other neighborhoods. Several large parcels near the Metro station are already slated for redevelopment and will include approximately 80,000 square feet of new retail space.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *Multi-neighborhood retail anchors on Monroe Street, west of the Brookland-CUA Metro station.*
- ✓ *Small-scale, neighborhood- and University-serving retail along 12th Street, NE.*



CAPITOL RIVERFRONT



Retail Market Category: High Growth Market
 Retail Market Study Area: M Street SE to the waterfront, from South Capitol Street SE to Isaac Hull Avenue SE

The District's “baseball district” is undergoing perhaps one of the most dramatic transformations of all neighborhoods in the city, replacing heavy industry with a mix of high-profile projects and reclaiming the city’s underused Anacostia River waterfront. The new Nationals Park attracted 2.8 million visitors in 2008; over 9,000 new condominiums, apartments, and townhouses are in place or under construction; and, with the expansion of the Washington Navy Yard, relocation of the US Department of Transportation, and other new office development projects, the neighborhood will be home to over 100,000 workers and 17,000 residents. Redevelopment plans include construction of four new parks and a multi-purpose recreational trail along the Anacostia River. The commercial district has easy access to the Navy Yard Metro station and to I-295 and I-395. Recognizing its strong growth and changing demographics, developers have proposed more than half a million square feet of retail space for the neighborhood, some of which is already under development. But the neighborhood’s activity nodes are distinct enough that the district can support multiple commercial clusters, including clusters along M Street (near the new Department of Transportation headquarters), along Half Street (leading into the Ballpark), along the riverfront, and near the Navy Yard and Southeast Federal Center.

STRATEGIC ADVANTAGES:

- *The Capitol Riverfront District has quickly become a major employment center and residential community, with the stadium serving as a super-regional anchor, but retail development has not yet kept pace with office and housing development, providing numerous opportunities for new retail development.*
- *Large tracts of undeveloped waterfront land such as those available in the M Street SE neighborhood are rare in the District and represent prime development and revitalization opportunities.*
- *The district is close to downtown, with easy access to the Southeast and Anacostia Freeways.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *As it continues to grow, the neighborhood’s residents will likely continue to generate significant retail demand for groceries, entertainment, and restaurants - and, as the number of ‘empty nest’ households in the neighborhood increases, so will demand for personal care products and services.*
- ✓ *Half Street functions as an entryway to the Ballpark, making it a good location for businesses that can provide both visitor-serving retail and services and neighborhood-serving goods and services.*
- ✓ *M Street is the district’s primary multi-modal corridor and, as such, can support auto-oriented retail.*
- ✓ *Restaurants and retail outlets within the district could use storage, assembly and staging in lower-priced warehouses and light industrial buildings in nearby neighborhoods east of the Anacostia River.*



CENTRAL 14th STREET NW



Retail Market Category: High Growth + Transitioning Market
 Retail Market Study Area: 14th Street NW from Park Road to Taylor Street, & Park Road between 14th Street NW & 16th Street NW

The Central 14th Street, NW commercial corridor is undergoing one of the District's most dramatic transitions. New developments like DC USA, which brought 500,000 square feet of new retail space to the District in 2008 (including a Target and Best Buy), have spurred interest in the neighborhood - particularly in Columbia Heights, on the southern end. The neighborhood offers a broad range of cultural assets, as well, and the recent rehabilitation and reopening of the historic Tivoli Theatre as the home of a Latino arts troupe in 2005 has intensified interest in the commercial district's potential as an arts hub. The district has a large concentration of minority-owned businesses - 97 percent of the 151 small businesses north of Meridian Place are owned by minorities - providing built-in market diversity and character.

STRATEGIC ADVANTAGES:

- Recent new commercial and residential development has increased the number of workers, shoppers, and residents.
- Central 14th Street is a significant north/south corridor, with thousands of people traveling through the neighborhood each day.
- Served by the Columbia Heights Metro station.
- Close proximity to Howard University and the Georgia Avenue/Petworth Metro station provide continuing growth.

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ Regional destination retail around the intersection of 14th Street, NW and Park Road.
- ✓ Small-format retail north between Spring and Shepherd Streets.
- ✓ Corner lots could be redeveloped as neighborhood retail anchors and gathering places.



DOWNTOWN / PENN QUARTER / EAST END



Retail Market Category: Stabilized Market
 Retail Market Study Area: Area from New York Avenue to Pennsylvania Avenue NW, between 14th Street NW & 6th Street NW

For most of the city’s history, the District’s downtown (including Penn Quarter and the East End) was a bustling retail and business center. In recent decades new suburban development diverted away much of its retail energy - but downtown is now poised for a dramatic comeback. Explosive new development in Penn Quarter has boosted downtown’s resident population by thousands and its worker population to 200,000. The Verizon Center, Folger Shakespeare Theatre, International Spy Museum, Madame Tussaud’s Wax Museum, and two multiplex cinemas have opened in the past decade, and the National Portrait Gallery and Ford’s Theatre have just completed major renovations, adding an even greater array of attractions and cultural activities to the National Mall’s many museums and galleries. Major national and international retailers - H&M, West Elm, Zara, Guess - have recently opened downtown stores. The ten-acre former Convention Center site, in the middle of the district, offers an almost unprecedented opportunity to develop a landmark new city center anchored by world-class retailers. Current plans call for 670 units of new housing, 350,000 square feet of retail space (30 percent of which must be unique, non-chain retail), 465,000 square feet of office space, a 400-room high-end hotel, and 1,700 underground parking spaces.

STRATEGIC ADVANTAGES:

- *Nine million people visit the downtown district annually.*
- *The downtown district has a captive daytime market of 200,000 workers.*
- *New home buyers in the downtown district have an average household income of more than \$144,000, among the highest in the city.*
- *The district offers a wide range of entertainment and dining options.*
- *Easy access via the Circulator, Metrobus, and seven Metro stations, as well as SmartBikes.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *Flagship retail in downtown and the east end*
- ✓ *Fashion retail along F Street NW*
- ✓ *Tourist-focused retail*
- ✓ *Neighborhood-serving retail for the district’s growing residential population*
- ✓ *Entertainment and restaurants*



DUPONT CIRCLE



Retail Market Category: Stabilized Market
 Retail Market Study Area: Connecticut Avenue NW from Florida Avenue south to K Street, & along P Street from Dupont Circle east to 22nd Street

Home to embassies, think tanks, national nonprofit organizations, and a healthy mix of businesses and restaurants, Dupont Circle is one of the most cosmopolitan in DC and a magnet for residents and visitors attracted by its lively urban lifestyle, diversity, and historic architecture. The area north of Dupont Circle, once catalyzed as the center of DC's gay community (and still home to one of the nation's oldest gay bookstores), serves as a neighborhood-serving retail hub for the surrounding affluent residential neighborhoods. The area south of the Circle has a higher concentration of offices - and about 70,000 workers - with a mix of businesses that cater to workers, visitors and residents and ranging from luxury retail stores to worker-oriented take-out restaurants. Increasing rent levels have nudged out some of the neighborhood's independently owned businesses in recent years, with a growing number of national retail chains taking their places.

STRATEGIC ADVANTAGES:

- *Dupont Circle's 20,000 residents are relatively young and affluent.*
- *70,000 people work within a ten-minute walk.*
- *The neighborhood has a large collection of popular, well-established restaurants that are busy throughout the day and evening.*
- *Dupont Circle is the center of gay and lesbian culture in the District, with one of the nation's oldest GLBT bookstores, Lambda Rising.*
- *The neighborhood's Metro station is one of the busiest in the District.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *Flagship retail, particularly south of the Circle, clustered around the key intersections of Connecticut Avenue and 18th Street with M Street and Rhode Island Avenue*
- ✓ *Specialized tourist-focused retail*
- ✓ *Neighborhood-serving retail, particularly for young households and empty-nest households, particularly north of the Circle*



FRIENDSHIP HEIGHTS



Retail Market Category: Stabilized Market
 Retail Market Study Area: Wisconsin Avenue NW from Garrison Street to Western Avenue

Friendship Heights is a well-established mixed-use neighborhood, boasting upscale regional retail shopping centers, corporate headquarters, and affluent residential streets. The northernmost section of the district, bordering Montgomery County, Maryland, is home to Mazza Gallery and Chevy Chase Pavilion and is a recognized luxury goods shopping destination, with prominent national retailers like Neiman Marcus, Saks Fifth Avenue, Williams-Sonoma, and Pottery Barn. Chevy Chase, Maryland, just above the District border, helps shape public perceptions of the entire retail district, and shoppers tend to view the Friendship Heights and Chevy Chase district as one continuous district, particularly along the Wisconsin Avenue corridor. Upscale shoppers from the entire region are drawn by the quality and concentration of stores on both sides of the District-Maryland border.

STRATEGIC ADVANTAGES:

- *The district is a well-established, one-of-a-kind shopping destination with super-regional anchors, including a cluster of high-end boutiques.*
- *The surrounding neighborhoods are among the District's most affluent, with the median home value above \$750,000, median household income above \$100,000, and significant retail buying power.*
- *The heart of the commercial district is easily accessible via the Friendship Heights Metro station, with direct access from the station into both Mazza Gallery and Chevy Chase Pavilion.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *Upscale retail and restaurants.*
- ✓ *High-end garden and home furnishings stores.*
- ✓ *The Metro Bus Western Division parking lot, in the southern end of the district, is a large, underutilized site that could be redeveloped as a mixed-use center with street-level retail.*



GEORGIA AVENUE / GATEWAY



Retail Market Category: Emerging Market
Retail Market Study Area: Georgia Avenue NW from Fern Street NW to Eastern Avenue Intersection

Located on the border of Northwest DC and Silver Spring near Rock Creek Park, this commercial corridor serves as one of the primary gateways from Maryland into the District. This bustling district features a mix of small-scale retail businesses and offices catering to the surrounding middle-income neighborhoods. Although the nearest Metro stations (Silver Spring and Takoma) are one mile from the commercial district's northern and southern tips, Georgia Avenue itself is a major commuter route with a proven ability to attract national chains like McDonalds, Pizza Hut, and PNC Bank. Walter Reed Army Medical Center anchors the area's southern end; it is scheduled to close, which could unlock significant mixed-use redevelopment opportunities.

STRATEGIC ADVANTAGES:

- *Georgia and Eastern Avenues are high-volume commuter routes, with an average daily auto count of 27,500, providing vital visibility for retail businesses.*
- *The commercial district's trade area consists largely of upper- and middle-upper-income households, with significant retail buying power in nearby communities like Shepherd Park, Colonial Village, and Takoma Park.*
- *Planned development projects - approximately 230 new residential units, plus almost 300,000 square feet of office space and more than 300,00 square feet of mixed-use space - will augment neighborhood retail demand.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *Although most of the district consists of relatively small-scale commercial buildings, there are several intersections that can support larger-scale, inline retail formats (such as the two northernmost starburst intersections), filling gaps in the market left by competing offerings in nearby downtown Silver Spring, Maryland.*
- ✓ *Establish the southern of the two starburst intersections (at Georgia Avenue/Alaska Avenue/Kalmia Road/Eastern Avenue East) as the district's main intersection and pedestrian gathering spot.*
- ✓ *The Walter Reed Army Medical Center is scheduled to close. The site's availability could provide a unique opportunity to create a major mixed-use node.*



GEORGIA AVENUE / PETWORTH



Retail Market Category: Transitioning Market
Retail Market Study Area: Georgia Avenue NW from Upshur Street NW to Columbia Road NW

The expansive Georgia Avenue-Petworth corridor - the District's longest commercial corridor - offers convenient access to residents of both the District and nearby Maryland. Home of several of the District's most important historic and recreational sites, including President Lincoln's summer cottage and the US Soldiers' and Airmen's Home, the neighborhood has suffered from deferred maintenance and neglect over the years. A recent flurry of residential and commercial development around the Georgia-Petworth Metro station has spurred a number of positive changes. The area benefits from a strategic location close to Howard University, the Children's National Medical Center, Columbia Heights, and the Washington Hospital Center, and is served by a central Metro station. The northern part of the commercial district is predominantly residential, anchored by a Safeway, with a scattering of locally owned businesses. The central section of the corridor, radiating out from the intersection of Georgia and New Hampshire Avenues and from the Georgia Avenue-Petworth Metro station, is poised for new mixed-use development. The section of the corridor south of this intersection, near Howard University, has the most dense concentration of existing retail businesses. Here, the relatively shallow lot depths lend themselves to small-scale, inline retail.

STRATEGIC ADVANTAGES:

- *Howard University is a major anchor, with student enrollment of 11,000.*
- *Georgia Avenue is a major traffic artery in and out of the city, providing lots of visibility for the corridor's retail businesses.*
- *The neighborhood has a high homeownership rate - 64 percent - providing neighborhood stability.*
- *Development projects in the pipeline will add several hundred apartments, condominiums, and townhouses to the neighborhood, with most of the new development clustered near the Metro station.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *There are numerous opportunities for infill development, particularly in the northern and central portions of the district.*
- ✓ *The northern section of the corridor can support additional neighborhood-serving retail goods and services.*
- ✓ *The area around the Georgia Avenue-Petworth Metro station is primed for transit-oriented mixed-use development.*
- ✓ *The proximity of the southern end of the corridor to Howard University suggests opportunities for student-focused retail and services, such as food and entertainment.*



H STREET NE



Retail Market Category: Transitioning Market
 Retail Market Study Area: H Street NE from 2nd Street NE to Bladensburg Road, including the star-burst intersection with Bladensburg Road, Maryland Avenue NE, & Benning Road

This 1-mile corridor east of Union Station is booming with new homes and businesses. Although it struggled with a high vacancy rate and physical deterioration over the past several decades, it is now becoming a vibrant cultural district and lively residential neighborhood with new performing arts venues, popular bars, and eclectic businesses. Investment in arts and entertainment venues - particularly the restoration of the Atlas Performing Arts Center - has drawn visitors from throughout the region and helped brand H Street's eastern end as the "Atlas District." Its western end is close to Union Station and Gallaudet University, giving it excellent access to tens of thousands of potential customers. Corridor-wide streetscaping is underway, and a new streetcar that will stop at the Hopscotch Bridge and the intersections of 4th, 8th and 12th streets NE will increase access and visibility. Currently, the X1 and X2 Metro buses serve the entire length of the corridor.

STRATEGIC ADVANTAGES:

- *The 4,000+ new housing units now in the development pipeline will boost demand for neighborhood-serving retail.*
- *The blocks at the intersections of H Street NE and 4th, 8th and 12th Streets are important nodes for retail development.*
- *The district has strong historic building stock, with distinctive storefronts.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *The district's growing arts and entertainment sector will increase demand for restaurants, bars, and other entertainment-related retail businesses.*
- ✓ *The eastern gateway to H Street, where Bladensburg and Benning Roads and Florida and Maryland Avenues converge, has the potential to become a regional shopping destination.*
- ✓ *The Hechinger Mall, at the eastern end of the corridor, is ripe for mixed-use redevelopment and for serving as a regional retail anchor complementing the smaller, independent stores on H Street.*
- ✓ *Vacant and underused land and property near Union Station could be consolidated to develop new housing and offices, providing a larger customer base for H Street's businesses.*



KENNEDY STREET NW



Retail Market Category: Emerging Market
Retail Market Study Area: Kennedy Street from Georgia Avenue to Missouri Avenue NW

Perpendicular to Georgia Avenue and tucked between two larger commercial districts (Georgia Avenue/Gateway and Georgia Avenue/Petworth), Kennedy Street's eight-block commercial corridor is a mix of rowhouses and neighborhood-serving shops. It is surrounded by middle-income neighborhoods, but retail has not kept up with the neighborhood's changing demographics. The district's most iconic building is the recently renovated Kennedy Theater, which now serves as a Senior Wellness Center; almost all of its other buildings are single-story shops or 2-story residences. Kennedy Street is relatively narrow, with just one lane of through traffic in each direction, giving the street an intimate, compact feeling that lends itself well to small-scale, neighborhood-serving businesses. It does not have access to a nearby Metro station.

STRATEGIC ADVANTAGES:

- *Kennedy Street's proximity to Georgia Avenue provides the potential to tap into the customer base, yet offer a different, smaller-scale, more pedestrian-friendly retail experience.*
- *The neighborhood is solidly middle-class, with spending power that is not yet being adequately captured by the district's businesses.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *The number of neighborhood residents between 15-24 years of age will grow over the next few years, creating more demand for family-oriented goods and services and young adult household formation-oriented items, such as inexpensive furniture and quick service restaurants.*
- ✓ *Growth in the over-55 age group will increase demand for goods and services appealing to empty-nest households.*
- ✓ *Given the lack of large parcels and its distance from a Metro station, Kennedy Street is better suited to small and independently owned retail businesses and restaurants than to national chains and larger-format stores.*
- ✓ *The section of Kennedy Street between 5th and 7th Streets is the liveliest and has the strongest potential for infill and retail upgrades in the near future.*



NANNIE HELEN BURROUGHS & DIVISION AVENUES



Retail Market Category: Emerging Market
 Retail Market Study Area: Along the Nannie Helen Burroughs Avenue NE and Division Avenue NE intersection

One of the District's older communities, the Nannie Helen Burroughs/Division Avenue neighborhood boasts a diverse mix of family types, housing styles, open space, and public facilities. Although the neighborhood has struggled with disinvestment, improvements to Marvin Gaye Park, a 1.6-mile-long park that runs along the Anacostia River's largest tributary, has brought it new energy. The Park, the neighborhood's proximity to an active retail center at the intersection of Minnesota Avenue and Benning Road, as well as easy access to important corridors such as Kenilworth Ave (I-295), Eastern Ave, and East Capitol Street contribute to the neighborhood's appeal as a residential choice. Despite its proximity to major auto corridors, the neighborhood's commercial district is relatively small in scale and pedestrian in character.

STRATEGIC ADVANTAGES:

- *Nannie Helen Burroughs Avenue is a major corridor that feeds directly into Kenilworth Avenue (I-295).*
- *The District plans to invest over \$500 million to redevelop the Lincoln Heights and Richardson Dwelling "new communities" to create new housing, retail, offices, and public amenities in and around the commercial district.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *Limited Metro access makes the commercial district better suited for neighborhood-serving retail development than for large-format, regional retail development.*
- ✓ *The district's main commercial intersection - Nannie Helen Burroughs and Division Avenues - is under-developed and well-suited for small-scale, mixed-use redevelopment.*
- ✓ *The historic Strand Theatre could serve as a strong visual and market anchor if rehabilitated and reused.*
- ✓ *The neighborhood's retail offerings could be anchored by a supermarket, a group of restaurants, and other neighborhood-focused goods and services.*



NORTH CAPITOL STREET



Retail Market Category: Emerging Market
 Retail Market Study Area: North Capitol Street from Randolph Place to New York Avenue, including sections of Florida Avenue NE and New York Avenue NE

With quaint rowhouses and great views of the Capitol, the North Capitol Street neighborhood is one of the District's most rapidly revitalizing neighborhoods. Served by three major arteries - New York Avenue, Florida Avenue, and North Capitol Street itself - the neighborhood has excellent access to other parts of the city, Union Station is just several blocks south, and the New York-Florida Ave-Gallaudet University Metro Station is easily accessed. Several sizable offices, industries, and institutions - including XM Radio, Metro Ice, a FedEx distribution center, and the recently built headquarters of the Bureau of Alcohol, Tobacco, and Firearms - provide a large pool of potential daytime customers for businesses in the commercial district, augmenting the neighborhood's quickly-growing residential population. Just east of North Capitol Street, a former industrial area dubbed NoMa (North of Massachusetts) is gaining traction as a business hub, with major employers establishing office headquarters there. It also has easy access to the recently constructed New York-Florida Ave-Gallaudet University Metro station.

STRATEGIC ADVANTAGES:

- *NoMa is expected to eventually contain more than 20 million square feet of retail, residential, office, and hotel space.*
- *A large tract of open land east of North Capitol Street is available for development, with outstanding visibility and access.*
- *The recently constructed New York-Florida Avenue-Gallaudet University Metro station is a catalyst for redevelopment and makes the commercial district accessible to pedestrians.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *The neighborhood's predominant rowhouse physical character lends itself well to small, neighborhood-serving retail development.*
- ✓ *Current and new residents and daytime workers generate ample market demand for a new grocery store, multiple restaurants, and one or more entertainment/recreation stores, such as a fitness center.*



PENNSYLVANIA AVENUE SE



Retail Market Category: Emerging Market
 Retail Market Study Area: Three Nodes along Pennsylvania Ave at Minnesota Avenue SE, Branch Avenue SE and Alabama Avenue SE

A major commuter corridor and gateway to Capitol Hill, Pennsylvania Avenue SE is one of the District's signature boulevards, lined with turn-of-the-20th-century brick townhouses. Two large parks meander through the district - Fort Davis Park and Anacostia River Park - giving the neighborhood large expanses of attractive open space and access to recreational trails and outdoor activities. The district is anchored by three major nodes: L'Enfant Square, Branch Avenue, and Alabama Avenue. These nodes vary greatly in character - one is distinctly auto-oriented, one distinctly neighborhood-focused, one a little of both - but each offers pockets of retail businesses and restaurants that serve surrounding residential neighborhoods. There are numerous opportunities for retail infill development, particularly at the Branch and Alabama Avenue nodes, and for upgrading current retail offerings to better meet the needs of neighborhood residents. The intersection of Branch and Pennsylvania Avenues is the most commercially dense of the district's three major retail nodes and is ripe for redevelopment.

STRATEGIC ADVANTAGES:

- *Its direct access to Capitol Hill, the Anacostia Freeway, and the Capitol Beltway make it a good choice for businesses needing auto or truck access.*
- *More than 50,000 cars and trucks travel along Pennsylvania Avenue SE every day.*
- *The neighborhood's access to the Anacostia River, the Anacostia River Park, and its trail network make it an attractive site for new residential, office, and retail development.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *Redevelopment of the commercial cluster at the intersection of Branch and Pennsylvania Avenues.*
- ✓ *A small grocery store.*
- ✓ *One or two small restaurants.*
- ✓ *A small entertainment/recreation store, such as a gym or a bookstore.*



SHAW / CONVENTION CENTER



Retail Market Category: High Growth + Transitioning Market
 Retail Market Study Area: Along 7th-9th Streets NW from the Convention Center to Rhode Island Avenue

This historic neighborhood north of downtown is experiencing tremendous growth and transformation. Its prime location just north of bustling Gallery Place and Chinatown and south of Howard University and its position along the major 7th Street/Georgia Avenue corridor provide it with great visibility and access to tens of thousands of workers, residents, students, and commuters. And the recently built Washington Convention Center, which brought 1.1 million people to the neighborhood in 2008, provides it with a built-in market of captive retail customers. The former home of jazz legend Duke Ellington, the Shaw neighborhood is a historic center of African-American culture in the District. As such, it has magnificent historic buildings. The Howard Theatre, now being rehabilitated, has hosted luminaries from Booker T. Washington and Ella Fitzgerald to the Supremes and Redd Foxx. The grand O Street Market, slated to be redeveloped into 630 housing units, a 200-room hotel, and a 71,000-square-foot flagship Giant Food supermarket.

STRATEGIC ADVANTAGES:

- *Over a million people attend events at the Convention Center each year, providing the neighborhood with a captive market of potential retail and restaurant customers.*
- *Easy access to Metro's Green and Yellow Lines.*
- *Proximity to Gallery Place, Chinatown, and Howard University.*
- *Redevelopment of The City Market at O (the historic O Street Market) will provide momentum for new neighborhood-serving retail development.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *Neighborhood-serving retail in the northern part of the district, north of the Convention Center*
- ✓ *Restaurants and stores catering to Convention Center event participants (particularly during the daytime) and regional residents (particularly during the evening) along Seventh and Ninth Streets south of M Street*



SOUTH CAPITOL STREET



Retail Market Category: Transitioning Market
 Retail Market Study Area: Node One - South Capitol Street from MLK Jr. Avenue to Chesapeake Street SE; Node Two - South Capitol Street and Southern Avenue SE

This quiet neighborhood east of the Anacostia River runs along the border of the District and Prince George's County, Maryland. Although its main commercial street, South Capitol Street, is a major artery with easy access to the Anacostia Freeway, this neighborhood feels more suburban than urban in its physical form. Its abundance of homes with grassy lawns and the presence of Oxon Run Park enhance its suburban quality, contrasting sharply with more intense development just outside the neighborhood, such as the 245,000-square-foot Eastover Shopping Center directly across the District border, in Maryland. Because there is no easily accessible Metro station, this commercial district is auto-dependent. Upper South Capitol Street (north of Chesapeake Street, roughly) is more suburban in character, with businesses that are primarily neighborhood-serving. Lower South Capitol Street quickly becomes larger in scale, particularly as it approaches the massive Eastover Shopping Center. Retail in this area cannot compete with the scale of the large shopping center but can attempt to capitalize on Eastover's market energy, strategically filling in market gaps.

STRATEGIC ADVANTAGES:

- *Although the upper part of South Capitol feels distinctly small-scale and suburban, it quickly begins to feel and perform like a major commercial highway as it approaches the border with Prince George's County, Maryland, drawing thousands of potential shoppers through the district.*
- *The attractive three- and four-story garden apartments in the upper part of the neighborhood has renewed interest in residential development, particularly in Congress Heights, attracting new residents to the neighborhood.*
- *The intersection of South Capitol and Atlantic Streets has lots with good depth, providing new, somewhat larger-scale inline retail development opportunities.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *Near Eastover Shopping Center, regional retail that complements, rather than competes with, the stores Eastover offers.*
- ✓ *Neighborhood-serving retail, to accommodate the 1,150 new residential units currently in the development pipeline.*
- ✓ *Redevelop the South Capitol Shopping Center (at the intersection of South Capitol and Atlantic) to take advantage of its good lot depths and existing parking, service, and loading infrastructure.*



TENLEYTOWN



Retail Market Category: Stabilized Market
 Retail Market Study Area: Wisconsin Avenue NW from Yuma Street NW to Garrison Street NW

Originally known as “Tennally’s Town” after a roadside tavern operated by John Tennally, Tenleytown is an established retail, civic and office district surrounded by affluent neighborhoods, well-known educational institutions, and several key corporate headquarters. A strong retail cluster along Wisconsin Avenue between Brandywine and Albemarle Streets includes national retailers like Whole Foods, The Container Store, Best Buy, and Hudson Trail Outfitters - but elsewhere along the district’s Wisconsin Avenue corridor retail groupings are smaller and somewhat fragmented, providing opportunities for infill development and for redevelopment of several larger parcels. Proximity to American University, Sidwell Friends, Wilson High School, and other educational institutions provide the commercial corridor with a steady stream of student spending, and the district’s major employers (like Fannie Mae and Intelsat) add buoyancy to the district’s daytime retail market.

STRATEGIC ADVANTAGES:

- *High-volume automotive traffic along Wisconsin Avenue provides excellent exposure for retail businesses.*
- *Good public transit connections, with a Metro station (Tenleytown-AU) and numerous Metrobuses.*
- *Numerous opportunities to augment the existing retail mix, with more offerings for daytime workers, American University students, affluent neighborhood residents, and auto-oriented commuters.*

KEY RETAIL DEVELOPMENT OPPORTUNITIES:

- ✓ *Broader range of neighborhood-serving goods and services, including food services, pet supplies, and a florist.*
- ✓ *Higher-end sit-down restaurants.*
- ✓ *Businesses oriented to students and young professionals, including bookstores, coffee shops, and apparel.*
- ✓ *Higher-end stereos and electronics.*



Hot \$3.00
Chocolate 3.50

Water \$1.75

Pellegrino \$2.00

Nantucket
Nectar \$2.50

Honest
Tea \$2.25

Vitamin
Water \$2.25

Milk \$1.75
(12oz)

Traditional
Cappuccino
ITALIAN

Mocha \$
(dark or white)

Add Soy

Add Short

Add Syrup

Breve
(1/2 AND 1/2)

\$3.25 6oz
3.75 4.50 5.00
(white chocolate)

GREEN

- Dragonwell \$3.50
- Jasmine Pearl \$3.50
- Moroccan Mint \$3.00
- Orange Blossom \$3.00
- Sencha Superior \$3.25

- Almond \$3.00
- Gruyere/Prosciutto \$4.00
- Scone \$2.75
- Sticky Bun \$3.50
- Danish \$2.25

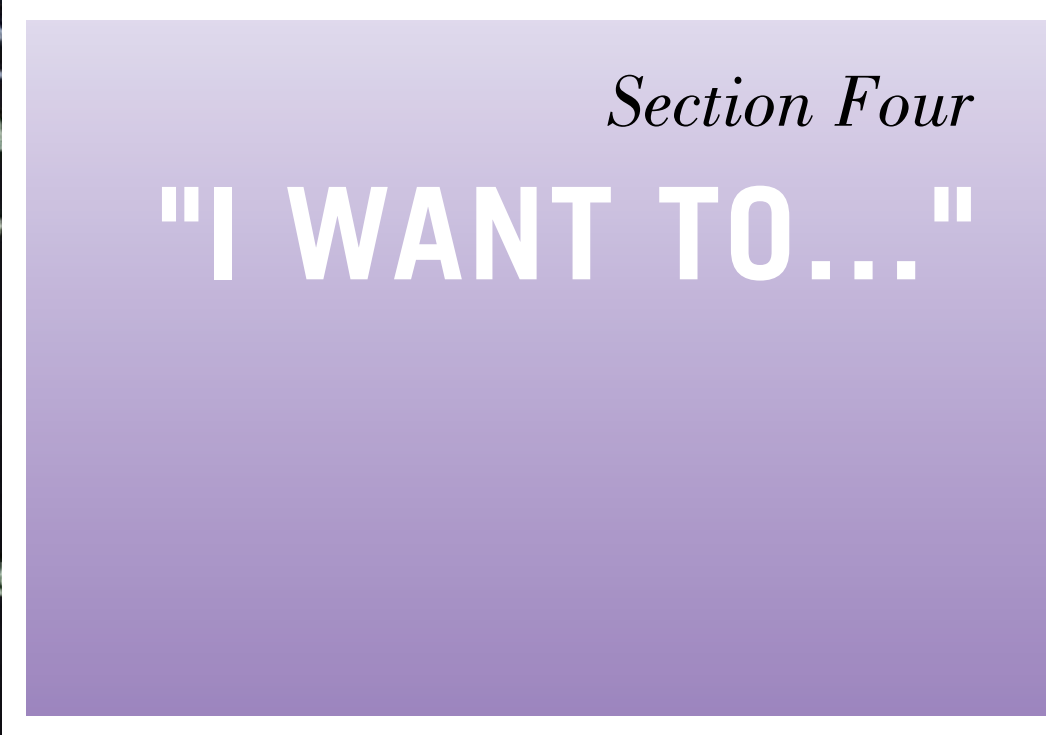
DECAF BOTANICALS

- Golden Chamomile
- Jamaica Red Bush
- Scarlet \$3.25

OOLONG

- Jade Oolong
- Iron Goddess of Mercy

ALL TEAS CAN
BE ICED.



Section Four

"I WANT TO..."

Retail corridors in the District offer ideal markets, locations and resources to launch, expand, invest in or build retail businesses. **What do you want to do?**

"I want to be part of a neighborhood-serving retail district."

Almost all of the District's commercial districts provide some neighborhood-serving goods and services, but new residential, office, and mixed-use development projects are bringing new workers and residents to District neighborhoods that have not enjoyed such strong retail potential for decades. Neighborhoods like Central 14th Street, H Street NE, and the Capitol Riverfront district are adding hundreds of new housing units, bolstering the market for neighborhood-serving retail businesses.

"I want to be near a sizable captive, daytime work force."

The District's downtown commercial districts are good choices, of course, but many District and federal offices are now moving into other neighborhood commercial districts, bringing thousands of workers and residents with them. The US Department of Homeland Security is moving to Anacostia, for example, and the District's Office of Employment Services is moving to the Benning Road/Minnesota Avenue commercial corridor. The North Capitol/NOMA, Capitol Riverfront and Shaw/Convention Center neighborhoods also have sizable daytime populations and are expected to continue to add new workers in the years ahead. And many of the District's well-established commercial districts, like Dupont Circle and Tenleytown, already have tens of thousands of daytime workers in place.

"I want to be near tourists."

The District of Columbia attracts 16 million visitors each year, and the National Mall sees more visitors than any other part of the District. The commercial corridors adjacent to the Mall and museums remain ripe for retail development. But tourism in other District neighborhoods is growing. The U Street corridor, for example, has become a hot visitor destination, fueled by President Obama's election, growing interest in African American heritage tourism, and dynamic new development. And increased popular interest in environmentalism is increasing tourism to the District's natural resources, such as Kenilworth Park and Aquatic Gardens, and the National Arboretum, creating new tourist-focused retail opportunities in the Bladensburg Road/New York Avenue and Anacostia/Poplar Point commercial districts. Events at the Convention Center draw more than a million people annually to the Shaw/Convention Center district, and recreational, cultural, and sports events in the Capitol Riverfront district attract hundreds of thousands more.

"I want to be in a district with a lively arts scene."

While a few District neighborhoods have long been known for arts, new arts and cultural centers are now popping up throughout the city. On H Street NE, the recently renovated art deco Atlas Theatre is the centerpiece of an arts cluster that also includes the H Street Playhouse, Joy of Motion Dance Center, and numerous galleries. The Central 14th Street commercial district also has a recently renovated theatre - the Tivoli, now housing a Latino arts troupe. The historic Howard Theatre, in the Convention Center/Shaw district, is now undergoing rehabilitation. Brookland has several nonprofit arts organizations actively working to organize arts-related activities and support arts-related businesses. All offer promising opportunities for nearby restaurants, galleries, and entertainment. For those looking for a firmly established arts and entertainment district, Downtown/Penn Quarter/East End is an excellent choice, anchored by the Folger Shakespeare Theatre, recently renovated National Portrait Gallery, Ford's Theatre, the Verizon Center, two multiplex cinemas, and dozens of restaurants, galleries, and coffee shops. And for those hoping to stimulate development of a new arts and entertainment cluster, several neighborhoods have underused or vacant historic theatres that could be redeveloped, such as the Strand Theatre in the Nannie Helen Burroughs and Division Avenues neighborhood.



"I want to own my retail space."

The District offers several tools to help business owners finance acquisition, construction, and renovation of commercial buildings, from bond financing to tax abatement. reSTORE DC and the Washington, DC Economic Partnership offer workshops and one-on-one assistance to help business owners explore options for buying property. And some of the District's new mixed-use projects offer ground-floor retail condominiums (Solea, for example, at 14th and Belmont Streets, NW).

"I want production space for assembly and storage."

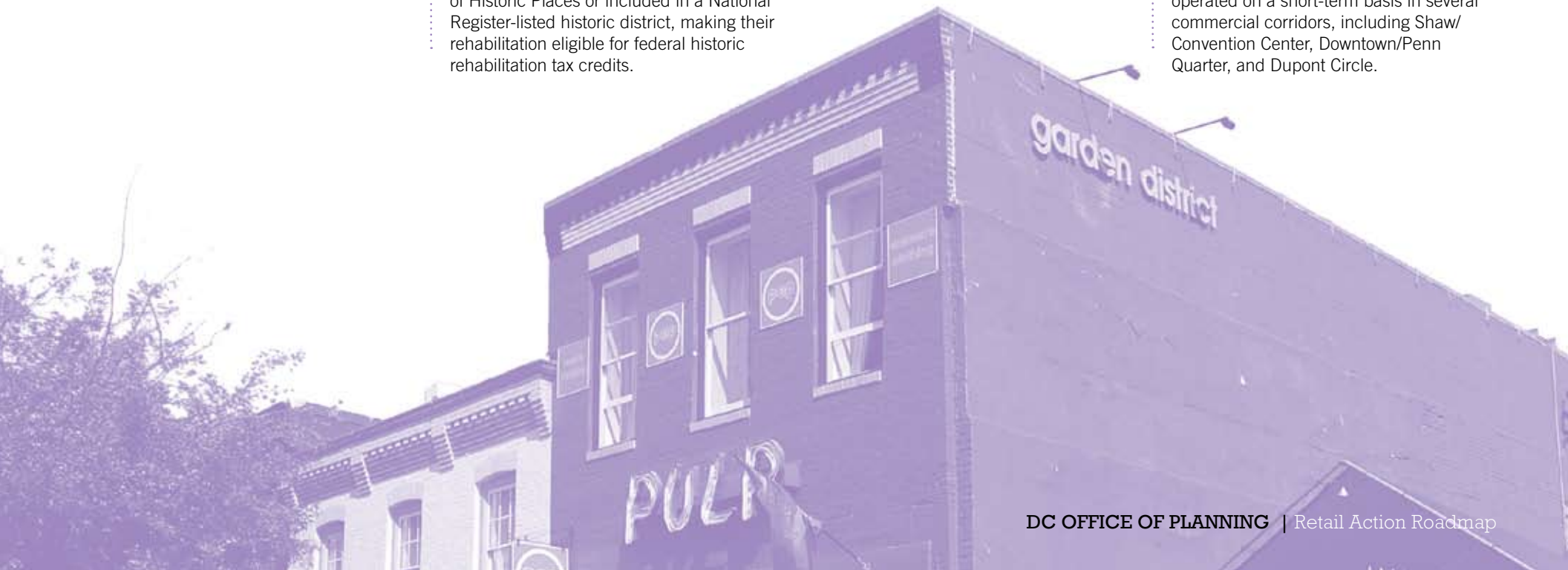
Several District neighborhoods have large buildings that are vacant or underused that could serve well for assembly and storage, with excellent access to major arterial roads. Many are located in Enterprise Zones and Economic Development Zones, like the Anacostia, Nannie Helen Burroughs/Division Avenues and New York Avenue-Bladensburg Road commercial districts, making them eligible for special incentives, including tax-exempt bond financing and wage credits. Some of these buildings are listed in the National Register of Historic Places or included in a National Register-listed historic district, making their rehabilitation eligible for federal historic rehabilitation tax credits.

"I want to get in on the ground-floor of a growing neighborhood."

Major new housing and mixed-use projects in the Anacostia/Poplar Point, Benning Road/Minnesota Avenue, Bladensburg Road/New York Avenue, Georgia Avenue/Petworth, H Street NE, Capitol Riverfront District, and South Capitol Street corridors will bring thousands of new residents and workers to these neighborhoods, providing strong organic growth in retail demand in the years ahead.

"I want to lease space on a temporary basis."

Opportunities to rent space for pop-up retail exist in almost all neighborhoods (to test a new product line, for example, or to sell products during a concentrated period of time). Property owners in some of the District's more established commercial corridors lease space on a seasonal basis, particularly during the winter holidays. Some business owners are willing to lease small amounts of space inside their businesses, particularly for entrepreneurs whose products complement their own. And mobile vending units can be operated on a short-term basis in several commercial corridors, including Shaw/Convention Center, Downtown/Penn Quarter, and Dupont Circle.



"I want to invest in small business start-ups in my neighborhood."

A growing number of individual and institutional investors throughout the US are pooling their resources to create community-based investment companies to help capitalize needed businesses. In some instances, these community-based companies are capitalized by shares of stock to local residents (the Green Bay Packers, for example, are owned by a community-based stock company). In other instances, a smaller group of investors pools its money to launch one or more businesses, providing benchmarks and business expertise to the businesses' management staff. This model could help stimulate business development in many of the District's commercial corridors, particularly in those where retail clusters are not yet well established and that are experiencing, or will soon experience, significant growth in the numbers of residents and workers. These include Anacostia/Poplar Point, Benning Road/Minnesota Avenue, Bladensburg Road/New York Avenue, Georgia Avenue/Petworth, H Street NE, Capitol Riverfront District, and South Capitol Street corridors.

"I want to rehabilitate historic commercial buildings and lease the ground-floor spaces to retail businesses."

Many of the District's neighborhoods have large clusters of older and historic commercial buildings in need of rehabilitation, including Anacostia, Brookland, Georgia Avenue/Gateway, H Street NE, Kennedy Street NW, and Pennsylvania Avenue SE, and many of these buildings are eligible for federal historic rehabilitation tax credits. By bundling together a group of historic storefront buildings so that the total rehabilitation costs are at least \$3 million, a property owner or developer can make more efficient use of the tax credits - and in commercial districts eligible for federal New Markets tax credits, the historic and New Markets credits can be combined to provide a significant portion of the equity needed for rehabilitation. In addition, the District offers many incentives that can also help finance the rehabilitation of commercial buildings, from tax abatement to low-interest loans.

"My nonprofit organization wants to help develop and support retail businesses in my neighborhood."

Nonprofit neighborhood organizations, like Main Streets programs and Community Development Corporations, can play pivotal roles in stimulating and supporting retail business development. With their front-line perspective, neighborhood organizations are well positioned to help existing businesses add new product lines, identify potential neighborhood entrepreneurs, help retiring business owners find a buyer to take over and keep the business in operation, and detect potential problems businesses might be having, among other things. And all District 501c3 organizations whose missions include community revitalization are eligible for tax-exempt revenue bonds, and there is no limit on the amount of bonds that the City can issue on behalf of nonprofit borrowers, making it easier for nonprofits to develop buildings for retail businesses.





Section Four

TOOLS AND RESOURCES

Sticky Rice - H Street NE

TOOLS + RESOURCES

Many of the tools the District needs to reach the goals of the **RETAIL ACTION ROADMAP** are already in place. Some of them are delivered through municipal programs such as the Enhanced Business Information Center (e-BIC) and the DC Main Streets program; others are offered by private-sector partners, like the Washington DC Economic Partnership and neighborhood-based Community Development Corporations. Some are available for any business or any site in the city; others are specific to certain districts, blocks, or business types. And, to help transform the District of Columbia into a truly world-class retail city, the City will develop some additional tools and resources to augment those already available.

The tools and resources available for retail development and development of retail buildings in the District include:

ADDITIONAL PERSONAL PROPERTY EXPENSING:

In addition to Section 179 income tax deductions, qualified businesses in District Enterprise Zones and Economic Development Zones may expense up to an additional \$20,000 annually for certain business equipment that is considered depreciable personal property.

Contact: reSTORE DC (restore.dc.gov)

GREENING DC RESTAURANTS PROJECT:

The DC Department of Small and Local Business Development has partnered with GreenHOME to launch the Greening DC Restaurants Project, which offers free technical assistance (workshop, consultations, publications) to DC restaurants located in target neighborhood commercial districts.

Contact: The DC Department of Small and Local Business Development (dslbd.dc.gov)

COMMERCIAL DISTRICT TECHNICAL ASSISTANCE PROGRAM:

The District's Commercial District Technical Assistance Program (CD-TAP) provides technical assistance resources for any neighborhood commercial district not designated as a DC Main Streets district. The program provides both direct technical assistance from reSTORE DC staff or other city staff and also matching grants for specialized technical assistance to nonprofit organizations whose goals include revitalizing a neighborhood commercial district. Grants for assistance in organizing commercial district revitalization programs do not require a match.

Contact: reSTORE DC (restore.dc.gov)

DISTRICT CONTRACTING LSDBE PROGRAM:

The District gives priority consideration to certified Local, Small and/or Disadvantaged Business Enterprises (LSDBEs) in awarding contracts offered by District agencies and on publicly assisted projects.

Contact: Department of Small and Local Business Development (olbd.dc.gov)

EMPLOYMENT INCENTIVES:

The Federal and District governments offer a variety of incentives to businesses that hire disadvantaged youth, unemployed veterans, participants in Project Empowerment (a program that helps ex-offenders train for and find new jobs), and other priority groups. These include:

- ✓ **Work Opportunity Credit:** A Federal tax credit for businesses that hire unemployed veterans, unskilled younger workers, or workers that belong to any of ten other targeted groups. In most instances, the program provides a federal income tax credit of \$2,400 for each eligible adult hired, \$1,200 per summer youth hired, \$4,800 per disabled veteran hired, and \$9,000 for each new long-term family assistance recipient hired over a two-year period.
- ✓ **Subsidized Employment:** If a business hires a worker participating in Project Empowerment for training, with the intention of hiring her or him, the District will pay a portion of the worker's salary (up to \$7.70 per hour) for up to 16 weeks, depending on training requirements.
- ✓ **Federal Bonding:** If a business with high-liability equipment hires a worker participating in Project Empowerment, the District will cover the cost of employee bonding, up to \$5,000 for a six-month bond, with an option for a second six-month period.

Contact: Department of Employment Services (does.dc.gov)

NEW MARKETS TAX CREDITS:

To help attract capital for business development to underserved neighborhoods, the Federal government offers New Markets tax credits to investors who provide equity to certified Community Development Entities. The Community Development Entities, in turn, provide loans and/or equity investments to qualified businesses in the targeted neighborhoods, usually at preferential terms.

Contact: Community Development Financial Institutions Fund (www.cdfifund.gov)

REVOLVING MICRO LOAN FUND:

The District's Office of Small and Local Business Development offers a micro loan program for businesses certified by the District as "small" or "disadvantaged", that have been in operation for at least two years, and that are independently owned, operated, and controlled. Loans of up to \$25,000 are available for businesses owned by District residents and for those located in a DC Main Streets corridor or other priority area. Loans of up to \$15,000 are available for those owned by non-residents or not in a priority area. Loans can be used for a wide range of business needs, including buying inventory, fixtures, and equipment; renovating property; and making environmentally efficient improvements.

Contact: Office of Small and Local Business Development (olbd.dc.gov/olbd)

FEDERAL CAPITAL GAINS TAX EXEMPTION:

A business located in designated Enterprise Zones and that derives at least 80 percent of its total gross income from business conducted within the Enterprise Zone is able to exclude federal capital gains taxes on sales of stock, partnership interests, and property. Investments must be held for a minimum of five years.

SECTION 504 LOANS:

The Federal government offers loans to help small businesses buy commercial property. The loan program offers 20-year fixed-rate loans at competitive rates for up to 90 percent of acquisition costs. To qualify, businesses must be for-profit, must plan to occupy at least 51 percent of the property purchased with the loan, and must fall within the US Small Business Administration's size guidelines (meaning that their tangible net worth must be less than \$7 million, with average net income of \$2.5 million or less for the two years before the loan is made).

Contact: US Small Business Administration (sba.gov)

HISTORIC REHABILITATION TAX CREDITS:

The Federal government offers income tax credits to owners of income-generating historic or older buildings. For historic buildings, the credit is equal to 20 percent of qualifying rehabilitation expenses; for non-historic buildings built before 1936, the credit is equal to ten percent. Property owners can use the tax credit to offset federal income tax liability in the year in which the rehabilitated property is placed in service and, if needed, can carry the credit back one year and/or forward 20 years. For rehabilitation projects larger than approximately \$3 million, the property owner can partner with an investor who contributes project equity in exchange for the tax credits.

Contact: Office of Planning, Historic Preservation Office (planning.dc.gov)

SUPERMARKET TAX EXEMPTION:

The District exempts owners of qualified supermarkets located in priority development areas from sales taxes on building materials and equipment used to build or substantially rehabilitate a qualified supermarket. It also exempts qualified supermarkets from paying license fees, personal property taxes, and real property taxes on the supermarkets for ten years.

Contact: Office of the Deputy Mayor for Planning and Economic Development (dcbiz.dc.gov)

SUSTAINABILITY INCENTIVES:

The District offers a variety of incentives to business and property owners to encourage conservation of energy, water, and natural resources. Incentives available to businesses and to owners/developers of commercial property include:

- ✓ **Renewable Energy Incentive:** The District provides rebates for installing solar photovoltaic and wind turbine renewable energy systems. Rebates are capped at \$33,000 per applicant per year, scaled according to number of watts of system capacity installed.
- ✓ **Greenroof Rebate:** The District provides a subsidy of \$3 per square foot for greenroof construction for both retrofits and new buildings, with a cap of \$12,000 per building for buildings under 5,000 square feet. A new program will be available in late 2009 or 2010 for buildings with roofs over 5,000 square feet.
- ✓ **Expedited Permitting:** The District offers expedited permitting for green development projects beyond legal and regulatory requirements.

Contact: District Department of Energy (ddoe.dc.gov and green.dc.gov)

TAX ABATEMENT:

The District works individually with companies, institutions, and nonprofits to shape customized tax abatement packages to attract and retain businesses. Preference is given to projects in priority, transitional neighborhoods.

Contact: Office of the Deputy Mayor for Planning and Economic Development (dcbiz.dc.gov)

TAX INCREMENT FINANCING (TIF):

The District sells tax-exempt government revenue bonds to finance public infrastructure redevelopment, paying off the bonds with a portion of the resulting incremental growth in real property tax collections. Sales tax increments may also be applied in order to shorten the repayment period. Tax Increment Financing is available for projects throughout the city, with dedicated TIF funding available for Great Streets Initiative neighborhoods. Special TIF funding is also available for downtown retail development with preference given to furniture, home furnishings, and apparel retailers.

Contact: Office of the Deputy Mayor for Planning and Economic Development (dcbiz.dc.gov)

TAXABLE AND TAX-EXEMPT BONDS:

The District provides below-market-rate loans to help lower the cost of capital for certain types of development (including commercial, industrial, and entertainment). Loan funds are generated by issuing and selling tax-exempt and taxable municipal revenue bonds, notes, or other obligations. Proceeds from the sale of these securities are then loaned to borrowers and may be used to finance, refinance, and reimburse the costs of acquiring, building, rehabilitating, expanding, improving, and equipping facilities. With tax-exempt bonds, businesses are not required to pay federal income tax on the interest earned from the investment, effectively making the loans available at interest rates lower than that of conventional loans. Qualified businesses in designated Enterprise Zones are eligible for up to \$15 million of tax-exempt "EZ bonds" to finance depreciable tangible property.

Contact: Office of the Deputy Mayor for Planning and Economic Development (dcbiz.dc.gov)

These tools and resources...

can be combined in almost infinite ways to help entrepreneurs establish or expand retail businesses and to help developers, property owners, and nonprofit organizations create and improve space for retail businesses. For example, an entrepreneur interested in opening a supermarket in an Enterprise Zone and locating it in a historic building could:

- ✓ Be exempt from District license fees, personal property taxes, and real property taxes for ten years
- ✓ Partner with a tax credit investor to convert historic rehabilitation tax credits and New Markets tax credits from the building's rehabilitation into project equity
- ✓ Obtain below-market-rate loans via tax-exempt bond financing
- ✓ Receive federal income tax credits of up to \$9,000 for hiring certain types of workers
- ✓ Claim an additional \$20,000 of depreciable property in income tax deductions beyond the amount already allowed by Section 179 of the Internal Revenue Code

Together, these tools and resources could provide the business owner with millions of dollars in savings in the costs of rehabilitating the building and operating the business over the course of its first decade.

PLACE-BASED PROGRAMS AND INCENTIVES

Some of the tools and resources the District offers are available for sites within these designated areas:

BUSINESS IMPROVEMENT DISTRICTS:

Business Improvement Districts (BIDs) collect a "self tax" from property owners in designated commercial districts and use the revenue generated to provide programs and services to the entire commercial district. BIDs help improve the safety and cleanliness of the commercial districts in which they operate by supplementing City services; they also market the commercial district, promote business development, and provide other types of assistance to business and property owners.

For more information:

restoredc.dc.gov/restoredc/cwp/view.asp?a=1409&q=572848

GREAT STREETS DISTRICTS:

The Great Streets Initiative is a multi-year, multiple-agency program to transform underinvested corridors into thriving, inviting neighborhood centers. The program commits \$100 million for transportation, streetscape, and transit improvements along seven designated corridors, plus an additional \$95 million in targeted Tax Increment Financing for six of the seven corridors.

For more information:

dcbiz.dc.gov/dmped/cwp/view,a,1366,q,598874,dmpedNav,|33026|33028|.asp

DC MAIN STREETS DISTRICTS:

The DC Main Streets program provides comprehensive revitalization assistance to competitively selected commercial districts within the District. Neighborhood Main Streets programs are organized and led by local volunteers and community development professionals.

For more information:

restore.dc.gov/restoredc/cwp/view.asp?a=1407&q=572036&restoredcNav_GID=1834

HUBZONES:

Administered by the US Small Business Administration, the Historically Underutilized Business Zones (HUBZones, for short) program provides federal contracting opportunities for qualified small businesses in designated areas. To qualify, a business must be at least 51 percent owned and controlled by US citizens; its principal office must be in a designated HUBZone; and at least 35 percent of its workers must live within the HUBZone.

For more information:

restore.dc.gov/restoredc/cwp/view.asp?a=1413&q=573030

ENTERPRISE ZONES AND ECONOMIC DEVELOPMENT ZONES:

Enterprise Zones and Economic Development Zones provide special incentives to stimulate economic growth and job development, including taxable and tax-exempt bond financing for business capital projects; job credits; \$20,000 in additional expensing allowances; and exemption from capital gains taxes on certain business investments.

For more information:

dcbiz.dc.gov

NEIGHBORHOOD INVESTMENT FUNDS:

The Neighborhood Investment Fund (NIF) is an annual, non-lapsing fund to finance economic development and neighborhood revitalization in 12 targeted areas of the District. The fund is capitalized by an annual contribution of 15 percent of the personal property tax. The goal of NIF is to fund initiatives that will revitalize target areas by strengthening economic development opportunities and improving quality of life.

For more information:

dcbiz.dc.gov/dmped/cwp/view,a,1366,q,604691,dmpedNav,|33026|,asp

ACKNOWLEDGEMENTS

The **RETAIL ACTION ROADMAP** was created through a partnership between the DC Office of Planning, the Deputy Mayor for Planning and Economic Development, the Washington DC Economic Partnership, and the Department of Small and Local Business Development. They engaged three consulting firms - Economic Research Associates, Jair Lynch Development Partners, and Street Sense – to gather data, identify key retail development opportunities, and outline initial strategies. Their research built on citywide drill-down research conducted by Social Compact in the first phase of the Retail Action Strategy. The Community Land Use and Economics Group augmented the retail development strategies, refined descriptions of retail development opportunities, and prepared this Retail Action Roadmap publication.



Sassanova - Georgetown



NEIGHBORHOOD CHARACTERISTICS

Current Market Orientation

Median Household Income

Residential Population

WARD		Submarket Classification(s)	Typical Walkscore*	2007		2012		Est. Population Change, 2007-2012
				Trade Area (½ mile)	Est. Trade Area (½ mile)	Total Trade Area (½ mile)	Est. Total Trade Area (½ mile)	
1	Adams Morgan / 18th Street	STABILIZED	97	\$ 51,447	\$ 53,396	59,100	60,876	3%
8	Anacostia / Poplar Point	HIGH GROWTH	69	\$ 30,612	\$ 33,736	20,449	23,461	15%
7	Benning Road / Minnesota Avenue	EMERGING	60	\$ 28,868	\$ 34,816	27,537	33,378	21%
5	Bladensburg Road / New York Avenue	EMERGING	71	\$ 35,285	\$ 40,377	11,825	21,391	81%
5	Brookland	TRANSITIONING	78	\$ 61,323	\$ 70,385	12,091	12,224	1%
6	Capitol Riverfront	HIGH GROWTH	74	\$ 61,934	\$ 72,953	12,158	18,394	51%
1.4	Central 14th Street NW	HIGH GROWTH + TRANSITIONING	91	\$ 46,415	\$ 54,904	53,642	60,014	12%
2	Downtown / Penn Quarter / East End	STABILIZED	98	\$ 35,262	\$ 42,587	24,891	27,437	10%
2	Dupont Circle	STABILIZED	100	\$ 61,802	\$ 73,713	40,528	42,381	5%
3	Friendship Heights	STABILIZED	77	\$ 127,221	\$ 152,394	15,717	16,345	4%
4	Georgia Avenue / Gateway	EMERGING	88	\$ 54,323	\$ 63,336	25,844	26,927	4%
1.4	Georgia Avenue / Petworth	EMERGING	69	\$ 38,944	\$ 46,288	36,741	42,579	16%
6	H Street NE	TRANSITIONING	94	\$ 43,554	\$ 50,187	37,838	48,301	28%
4	Kennedy Street NW	EMERGING	69	\$ 48,335	\$ 55,726	22,762	23,203	2%
7	Nannie Helen Borroughs / Division Avenues	EMERGING	43	\$ 36,112	\$ 41,630	11,675	11,772	1%
5	North Capitol Street	EMERGING	83	\$ 32,806	\$ 37,841	25,262	39,632	57%
7.8	Pennsylvania Avenue SE	EMERGING	55	\$ 45,268	\$ 51,566	16,853	16,966	1%
2	Shaw / Convention Center	HIGH GROWTH + TRANSITIONING	92	\$ 41,606	\$ 50,348	32,009	39,926	25%
8	South Capitol Street	TRANSITIONING	52	\$ 22,750	\$ 25,022	9,323	9,242	0%
3	Tenleytown	STABILIZED	75	\$ 90,143	\$ 109,923	13,386	13,966	4%

***Walk Score:**

Walk Score is a number between 0 and 100 that measures the walkability of an address or neighborhood.
www.walkscore.com

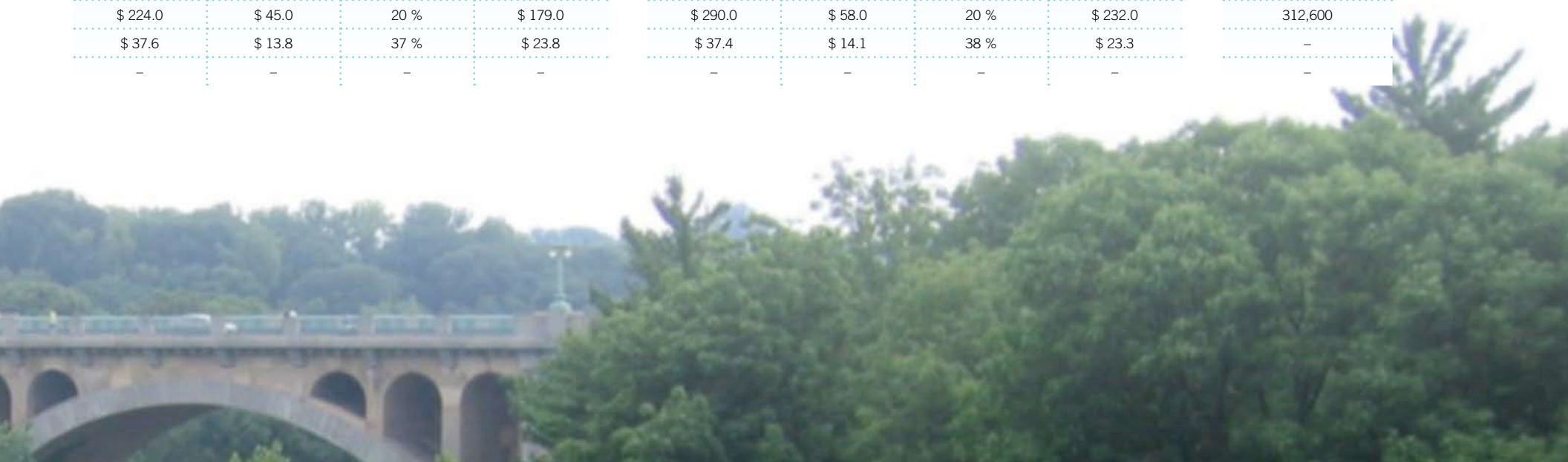
Unmet Market Demand

2007

Nbd Market Demand (millions)	\$ Captured (millions)	% Captured	Unmet Demand (millions)
-	-	-	-
\$ 77.8	\$ 32.4	42 %	\$ 45.4
\$116.0	\$19.8	17 %	\$ 96.2
\$ 58.5	\$ 11.7	20 %	\$ 46.8
\$ 116.0	\$ 40.3	35 %	\$ 75.7
\$ 116.7	\$ 42.2	36 %	\$ 74.5
\$338.0	\$ 147.0	43 %	\$ 191.0
-	-	-	-
-	-	-	-
-	-	-	-
\$ 241.0	\$ 79.3	33 %	\$ 161.7
\$ 204.0	\$ 42.6	21 %	\$ 161.4
\$ 242.0	\$ 79.5	33 %	\$ 162.5
\$ 140.0	\$ 33.9	24 %	\$ 106.1
\$ 47.3	\$ 5.8	12 %	\$ 41.5
\$ 118.0	\$ 33.6	28 %	\$ 84.4
\$ 115.0	\$ 22.4	20 %	\$ 92.5
\$ 224.0	\$ 45.0	20 %	\$ 179.0
\$ 37.6	\$ 13.8	37 %	\$ 23.8
-	-	-	-

2012

Nbd Market Demand (millions)	\$ Captured (millions)	% Captured	Unmet Demand (Millions)	SF of Retail + Restaurants Proposed or Underway
-	-	-	-	-
\$ 89.4	\$ 37.5	42 %	\$ 51.9	363,600
\$ 140.0	\$ 22.8	16 %	\$ 117.2	44,480
\$ 118.5	\$ 27.3	23 %	\$ 91.2	130,000
\$ 118.0	\$ 41.0	35 %	\$ 77.0	55,000
\$ 141.4	\$ 53.4	38 %	\$ 88.0	125,200
\$ 383.0	\$ 169.0	44 %	\$ 214.0	623,500
-	-	-	-	350,000
-	-	-	-	-
-	-	-	-	-
\$ 254.8	\$ 83.5	33 %	\$ 171.3	20,000
\$ 223.0	\$ 46.2	21 %	\$ 176.8	59,227
\$ 314.4	\$ 108.5	35 %	\$ 205.9	317,000
\$ 143.0	\$ 34.6	24 %	\$ 108.4	-
\$ 48.3	\$ 6.0	12 %	\$ 42.3	110,000
\$ 191.7	\$ 55.6	29 %	\$ 136.1	390,400
\$ 119.0	\$ 23.3	20 %	\$ 95.7	8,500
\$ 290.0	\$ 58.0	20 %	\$ 232.0	312,600
\$ 37.4	\$ 14.1	38 %	\$ 23.3	-
-	-	-	-	-





shake your booty

SHOES

SHOES
ASS
Timehri

MEZÈ

MEZÈ

PALM
READ
TAROT CARDS

Miss Sessie
Gifts Psychic
PAST FUTURE
PREVIEW ASTROLOGY
ASTROLOGY ORBITS & PALM TAROT
CRYSTAL DREAMS
CIGARS INTERPRET

TOLEDO LOUNGE

TOLEDO LOUNGE



DUBZ

Jyoti Indian Cuisine

play the paper

Ts. Muttly's

EXTRA



Government of the District of Columbia

Adrian M. Fenty, Mayor

District of Columbia
Office of Planning



District of Columbia
Office of Planning

1100 4th Street, SW; Suite E650
Washington, DC 20024

(202) 442-7600

planning.dc.gov