

**The City of the Future**  
***Retail Sustainability Initiative***  
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# Washington, D.C. at a Glance

**Regional Population: 5,476,241**

**DC Population: 601,723**

**718,000 jobs**

**68 square miles (only 43% is taxable)**

**20% of the city is parks and open space**

**Mean Household Income: \$90,580**

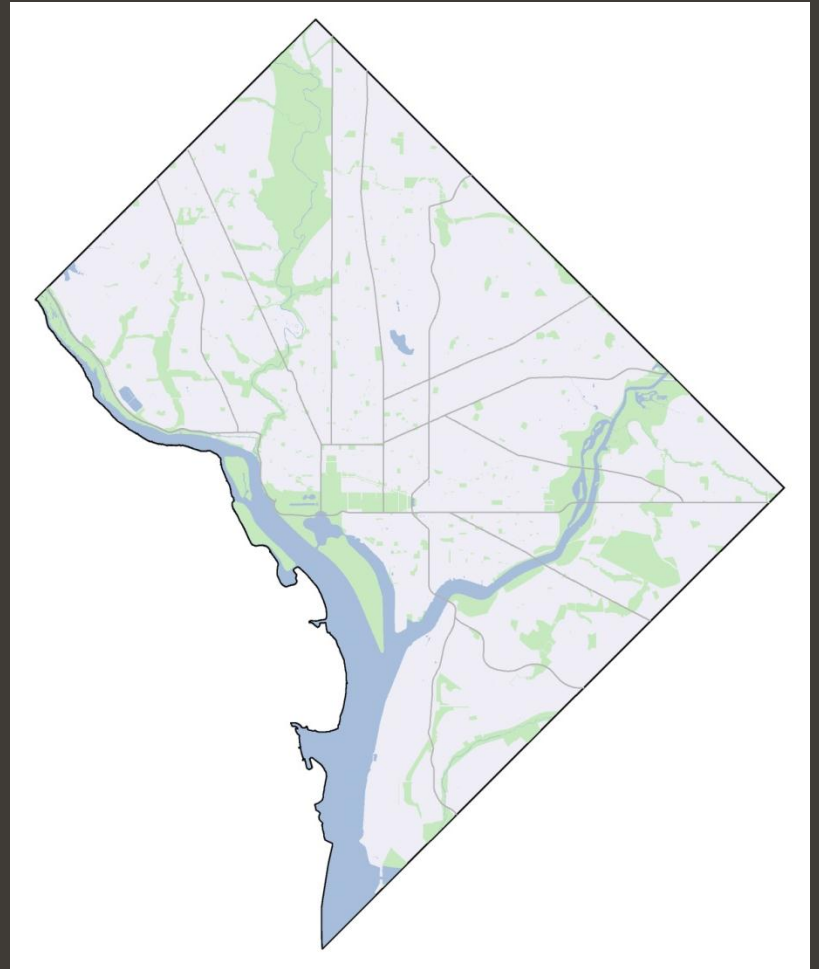
**47% have college or post-graduate experience**

**81% have access to internet**

**3<sup>rd</sup> largest office market in the country**

**2<sup>nd</sup> largest rail transit system**

**5<sup>th</sup> largest bus network in the United States**



# An Underserved Market

- DC has only **8.6 retail SF** per capita, compared to **26.4 SF** in the metro area, and **23.3 SF** nationally
- DC residents spend more than **\$1 billion** annually outside of the city
- Many neighborhoods have **unfulfilled retail potential**, with an imbalanced retail mix and a lack of basic services, dining and specialty retail
- Perceived market weaknesses may have limited expansion into **emerging areas**



# ...That Has Great Potential

- Daytime population in DC of **one million** (the largest percentage increase in daytime population in the U.S.)
- **16 million** visitors annually
- DC's residential income density is more than **8 times** the region's
- Income growth in District **outpacing** that of the nation
- Retail sales of **\$564 per SF**, compared to \$492 in metro area and \$320 nationally
- Embassies and consulates from **174 nations**
- Twenty-three universities and several hundred research institutions leading **innovation**



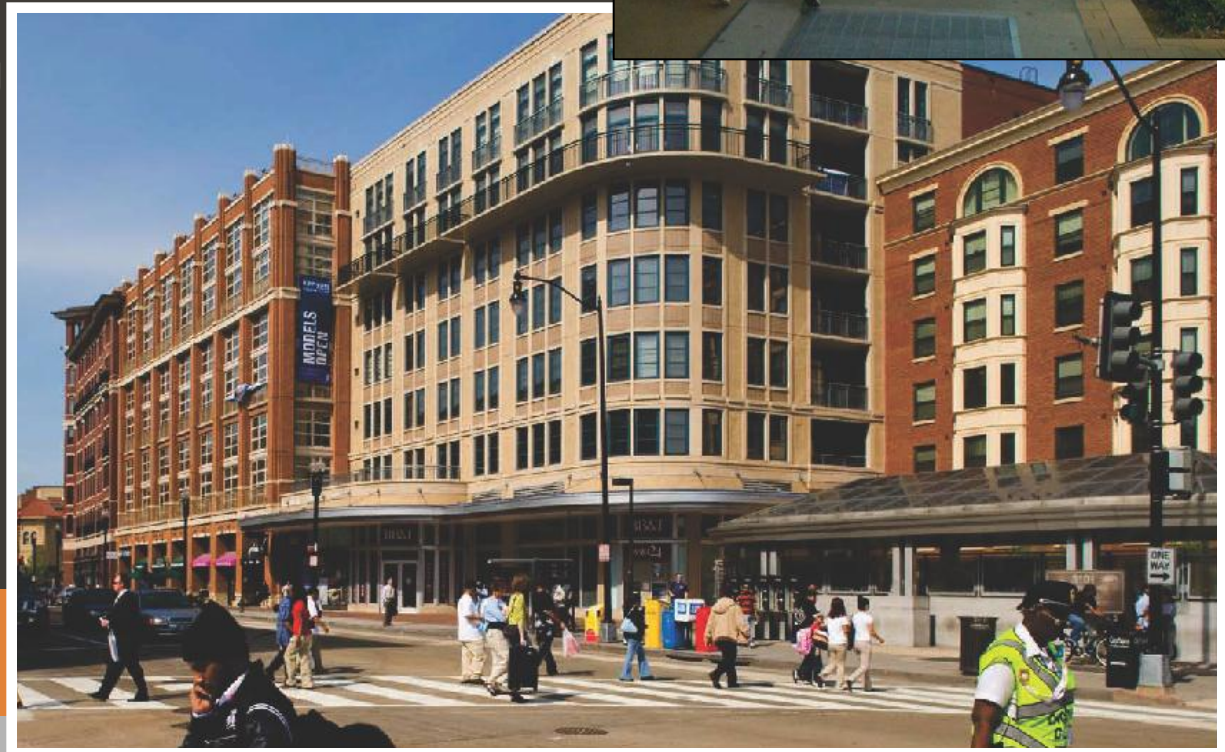
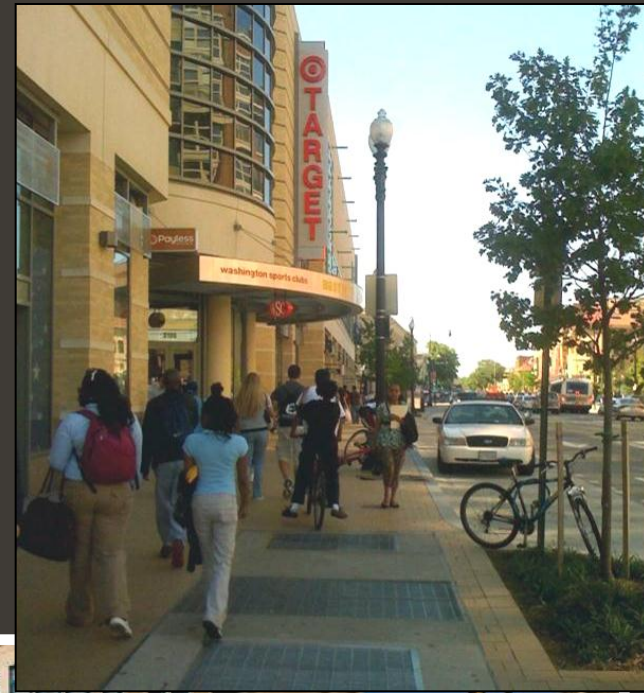
# DC Retail Is Evolving

- Vibrant retail districts and retailers
- Cluster opportunities
- Small and local entrepreneurs (vending + storefronts)
- Transformative neighborhood serving retail
- New regional and destination retail in downtown
- Emerging retail centers

# Columbia Heights Redevelopment – Converted into a key retail destination

More than **\$1 billion** in investment within 1  
mile of the site:

- 81 projects
- 4,000 units of housing
- 800,000 square feet of retail
- One of Target's  
highest performing  
stores



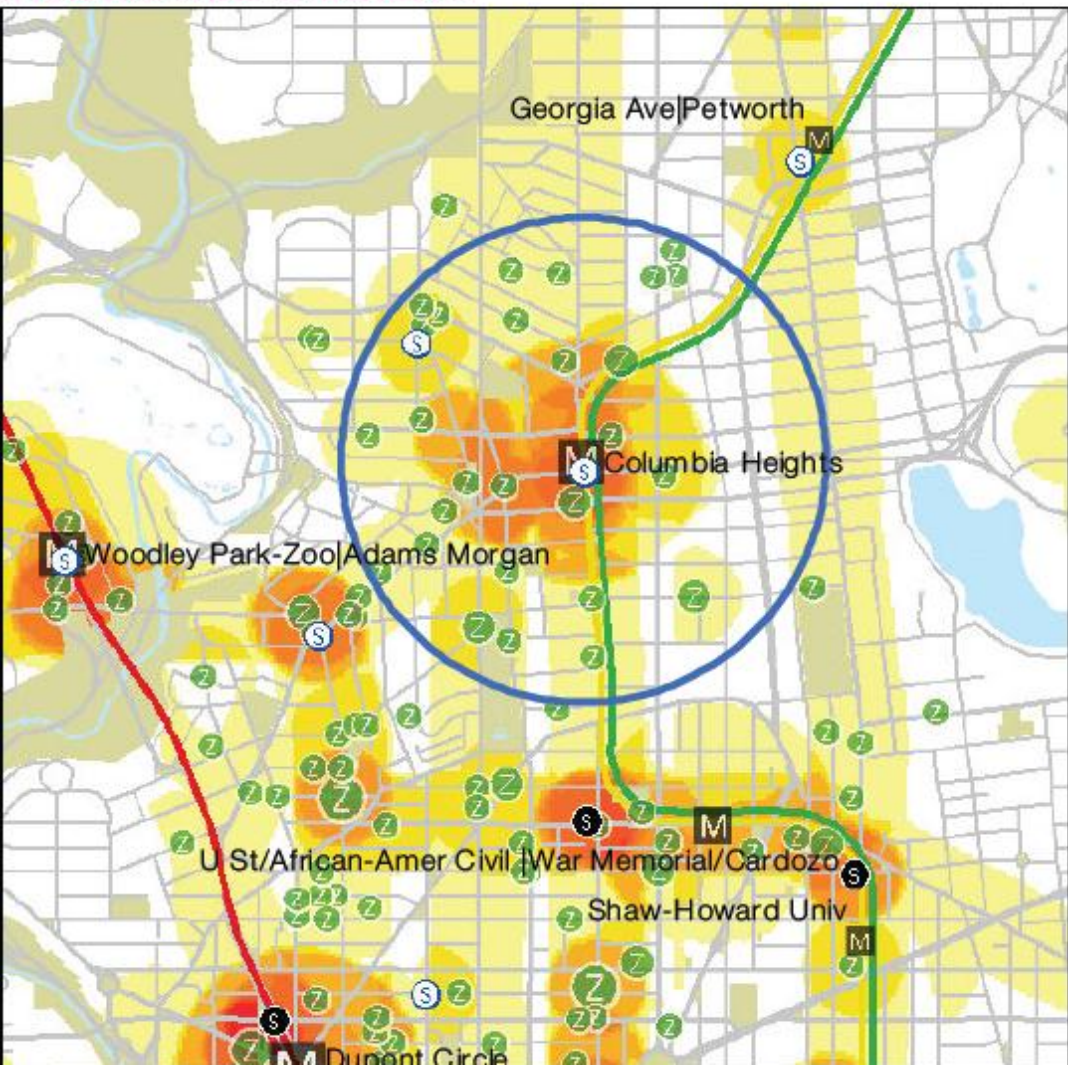
# And let there be parking...

- **1,000 space** underground garage with a price tag of **\$42 million**
- “Needed” to attract national credit tenants to the DC USA project
- Parking has been significantly underutilized
- Peak day use < 500 spaces
- **350 spaces now** offered for daily and monthly parking
- Metro station serves more than **17,000 riders** daily





## INTEGRATED MOBILITY

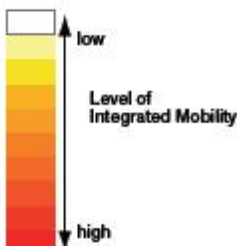


## COMMUNITY DETAILS

Measure	Columbia Heights	Average	
		All Sites	Metrorail Sites
Street Connectivity*	24	21.3	20.9
Household Vehicles	0.6	0.9	0.9
<b>Household Mode Share</b>			
SOV	25.8%	40%	37%
Transit	44.8%	36%	38%
Walk/ Bike	12.5%	9%	9%
<b>Commuter Mode Share</b>			
SOV	44.5%	55%	57%
Transit	17.9%	15%	17%
Walk/ Bike	16.7%	6%	6%

\* Number of Intersections within 1/4-Mile of the Station

- 1/2 Mile Around Station
- Existing SmartBike Racks
- Proposed SmartBike Racks
- Metro Stations
- Zipcar Locations



# Why focus on transportation?

- **30%** of national **greenhouse gas emissions** come from the transportation sector (mostly passenger vehicles)
- Public transportation saves the US the equivalent of **4.2 billion gallons** of **gasoline** annually

# Decreasing environmental impacts of transportation

1. Convert car trips to walk, bike and transit by providing more choice
2. Strategic land use planning

## RESULT:

- reduced emissions, fuel consumption & congestion
- increased mobility and disposable income!

# Evidence of Changing Preferences

- From 1994 to 2008, the share of transit, walking and bicycling trips increased in the District from 40% to 46% (e.g., 15%)
- Between 2005 and 2008 the % of passenger vehicle and motorcycle registrations in the District decreased by 11%
- Capital Bikeshare launched in 2010 with 1,100 bicycles and 110 stations across the District. and Arlington, VA. New members joining at 30-40 per day.



# Change in Modal Share of Daily Trips 1994 to 2007/2008

Age	Auto Driver	Auto Passenger	Transit	Walk	Bike	Other
5-15	0.0%	2.4%	1.0%	-0.2%	-0.3%	-2.8%
16-24	-6.9%	0.9%	2.3%	0.9%	-0.1%	2.9%
25-34	-6.4%	-0.7%	2.3%	4.6%	0.5%	-0.2%
35-44	0.9%	-3.9%	-0.2%	2.8%	0.4%	0.0%
45-54	2.5%	-3.8%	0.6%	0.8%	0.3%	-0.4%
55-64	-6.6%	-1.1%	3.8%	3.4%	0.6%	0.0%
65+	0.2%	0.0%	-0.5%	-0.4%	0.2%	0.5%
5-65+	-2.2%	-0.5%	0.7%	1.6%	0.2%	0.2%

# Percent Change in Mode Share 2000-2009

	Total Auto	Transit	Biking	Walking	Total Non-Auto	Driving alone	Carpooling
Washington	-12.7	12	86.2	-5.9	9.3	-5.1	-39.3
New York	-12.6	4	28.8	-1.1	3.3	-5.6	-34.3
Boston	-11.9	6.9	117.7	8.4	9.7	-10.9	-16.4
San Francisco	-9.6	2	50.2	10.5	6.2	-3.9	-31
Seattle	-7.7	10.9	59	4.4	12.5	-6.5	-14.1
Portland	-7.2	-6.4	230	6.3	18.6	-3.3	-28.1
Chicago	-6	1.6	129.2	4.7	4.1	1.4	-31.5
Austin	-5.1	12	11.9	-11.4	4.5	-1.2	-25.2
Charlotte	-3.7	8.5	3.6	59.4	24.3	-1.6	-16.2
Los Angeles	-3.6	10.7	63.8	-4.2	9.2	2	-28.7
Philadelphia	-3.5	-2.1	150.7	-4	1.2	4.3	-33.5
Detroit	-3.3	-12	192.4	58.4	7.8	4.1	-33.1

# DC's Changing Consumer Base...

- Average of **2,700** new residents every year since 2000, with **10,000** new residents in 2008-9 alone.
- Significant growth in **downtown**, with **40%** increase in population 2000-2009
- Influx of **young professionals** attracted to vibrant neighborhoods, with an increase of **6.5%** of 25-34 year olds between 2000 and 2008
- DC named as **#1** city for young professionals and **#3** for **entrepreneurs**
- Development of residential **products** that suit young professionals, mixed use
- Preference for shopping 'experience,' urban form, accessible by transit



# Location is *necessary but not sufficient* – suburban form delivers suburban performance



Home Depot - Rhode Island Ave, NW Washington, DC

# Location and form – the future of DC retail



High performing urban prototypes of suburban formats



Infill local retail served by multiple transportation options



Retail clusters such as creative and green

Pop-up and temporary retail, more variety in vending

