

# Fort Totten

## Application of DC Vibrant Retail Streets

Lamond-Riggs Development Task Force Presentation  
September 24, 2015

- What is Vibrant Retail Streets?
- Current condition of Fort Totten retail
- Vibrant Retail Streets (VRS) Technical Assistance with Fort Totten
- Questions and Discussion

# Purposes of Retail

Retail as Identity

Retail as Amenity

Retail as \$\$\$ Generator

Retail as Civic Use

Retail as Commerce

# What Does Your Neighborhood Want?

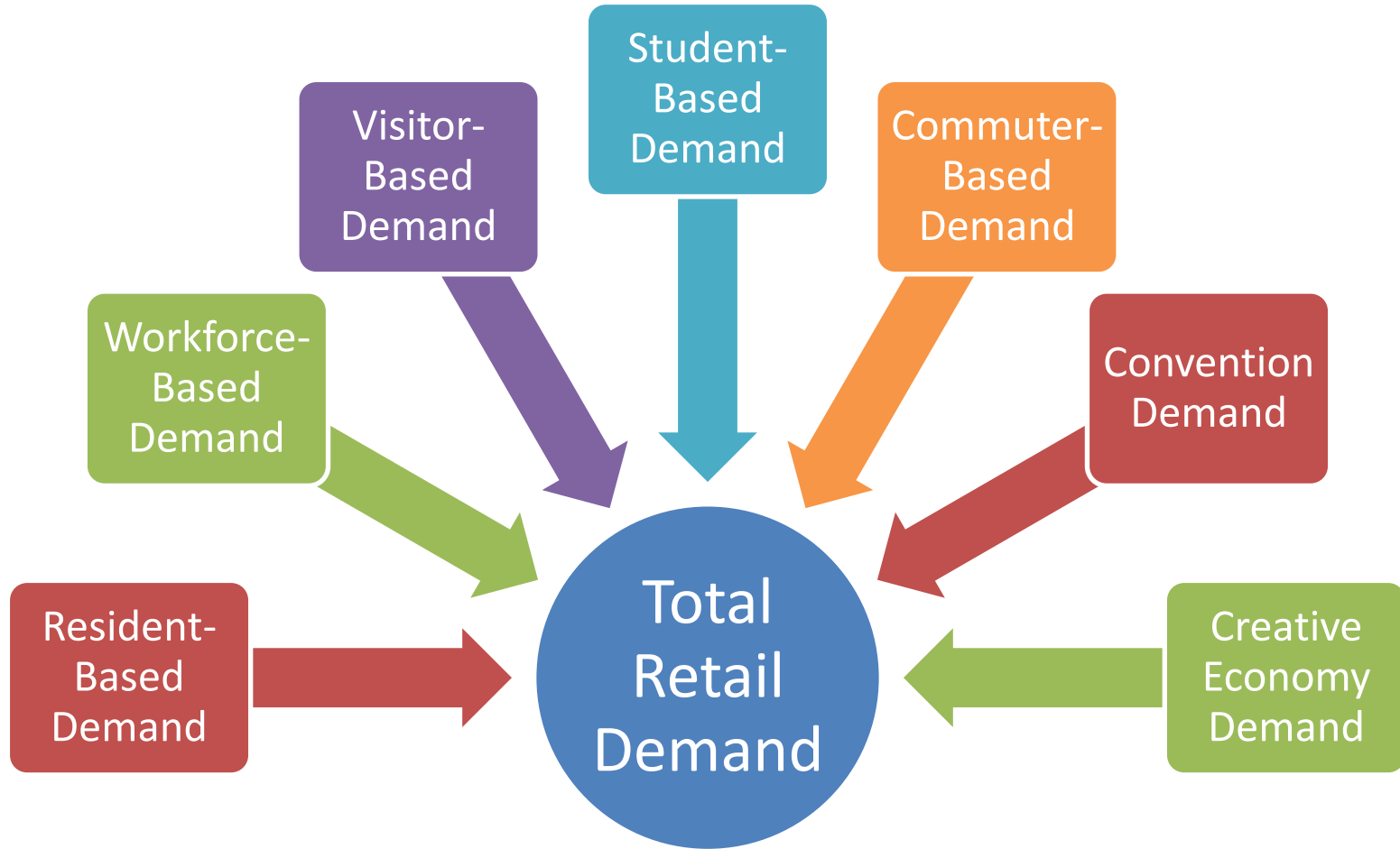
Who wants a bakery in our neighborhood?



## Consumer Spending Patterns

Product Category	2012 Aggregate Expenditure Estimate (in 1000s)	% Comp	2017 Aggregate Expenditure Estimate (in 1000s)	% Comp	2012 Annual Avg/ HH	2017 Annual Avg/ HH	Avg Annual % Growth	2012 Index to USA
<b>Total Specified Consumer Expenditures - USA</b>	5,952,302,761		6,525,325,678		50,195	52,858	1.93	
<b>Total Specified Consumer Expenditures (AREA)</b>	209,321	0.00	226,550	0.00	41,822	44,283	1.65	83
<b>FOOD AT HOME</b>	21,909	10.47	22,626	9.99	4,377	4,423	0.65	75
<b>Bakery Products</b>	2,171	1.04	2,264	1.00	434	442	0.85	80
Cereal Products	1,090	0.52	1,122	0.50	218	219	0.59	79
Dairy Products	1,883	0.90	1,956	0.86	376	382	0.78	62
Fresh Milk and Cream	492	0.24	510	0.22	98	100	0.72	60
Other Dairy Products	1,096	0.52	1,147	0.51	219	224	0.93	57
Eggs	295	0.14	300	0.13	59	59	0.35	91
Fats and Oils	212	0.10	218	0.10	42	43	0.59	77
Fish and Seafood	745	0.36	767	0.34	149	150	0.58	104
Fruits and Vegetables	2,634	1.26	2,720	1.20	526	532	0.65	72
Juices	836	0.40	862	0.38	167	168	0.61	92
Meats (All)	5,281	2.52	5,386	2.38	1,055	1,053	0.40	93
Nonalcoholic Beverages	2,374	1.13	2,436	1.08	474	476	0.52	75
Prepared Foods	3,639	1.74	3,797	1.68	727	742	0.87	64
Sugar and Other Sweets	1,043	0.50	1,097	0.48	208	214	1.03	55
<b>FOOD AWAY FROM HOME &amp; ALCOHOL</b>								
Alcoholic Beverages	4,015	1.92	4,216	1.86	802	824	1.00	78
Alcoholic Beverages at Home	3,360	1.61	3,524	1.56	671	689	0.98	75
Alcoholic Beverages away from Home	655	0.31	692	0.31	131	135	1.12	96

# Who Are Your Customers?



Where do they come from?

What do they want?



# DC Vibrant Retail Streets Vision

To give every neighborhood the necessary tools to create a Vibrant Street of their own, *regardless* of population, ethnic composition, location, income, or budget.





# dc vibrant retail streets toolkit



presented to:  
DC OFFICE OF PLANNING

presented by:  
**streetsense.**



# Evolution of Retail Streets

## Small-Scale Shopping Streets

Carytown • Richmond, VA

North Market Street • Frederick, MD

Main Street • Manayunk, PA

Charles Street • Boston, MA

Oak Street • Chicago, IL

Madison Park • Seattle, WA

Bethesda Row • Bethesda, MD

East Davis Street • Culpeper, VA

O'Donnell Square • Baltimore, MD

Atlantic Avenue • Brooklyn, NY

## Destination Streets

Walnut Street • Philadelphia, PA

Newbury Street • Boston, MA

North Michigan Avenue • Chicago, IL

Third Street Promenade • Santa Monica, CA

Champs-Elysees • Paris, France

Omotesando Dori • Tokyo, Japan



**First, we studied, measured, and investigated  
16 model vibrant streets...**



# Evolution of Retail Streets

No. of Tourists

Civic Uses

No. of Blocks in Length

Primary Customer?

Avg. Building Height

Year Established

Mix of Retailers

Supported by an Assoc./Org.

Underground Utilities?

Residential Population

Crime Statistics

Site Condition

# of Bus Routes

Retail Vacancy Rate

Condition of Ownership?

Vehicles per HH

walkscore

Average Daily Traffic Count

Median Household Inc

Locals : Nationals

Upper Floor Uses

Average Retail Rents

Within an Historic Dist.?

Avg Sidewalk Width

Located within a BID

Daytime Population

Cultural Anchor?

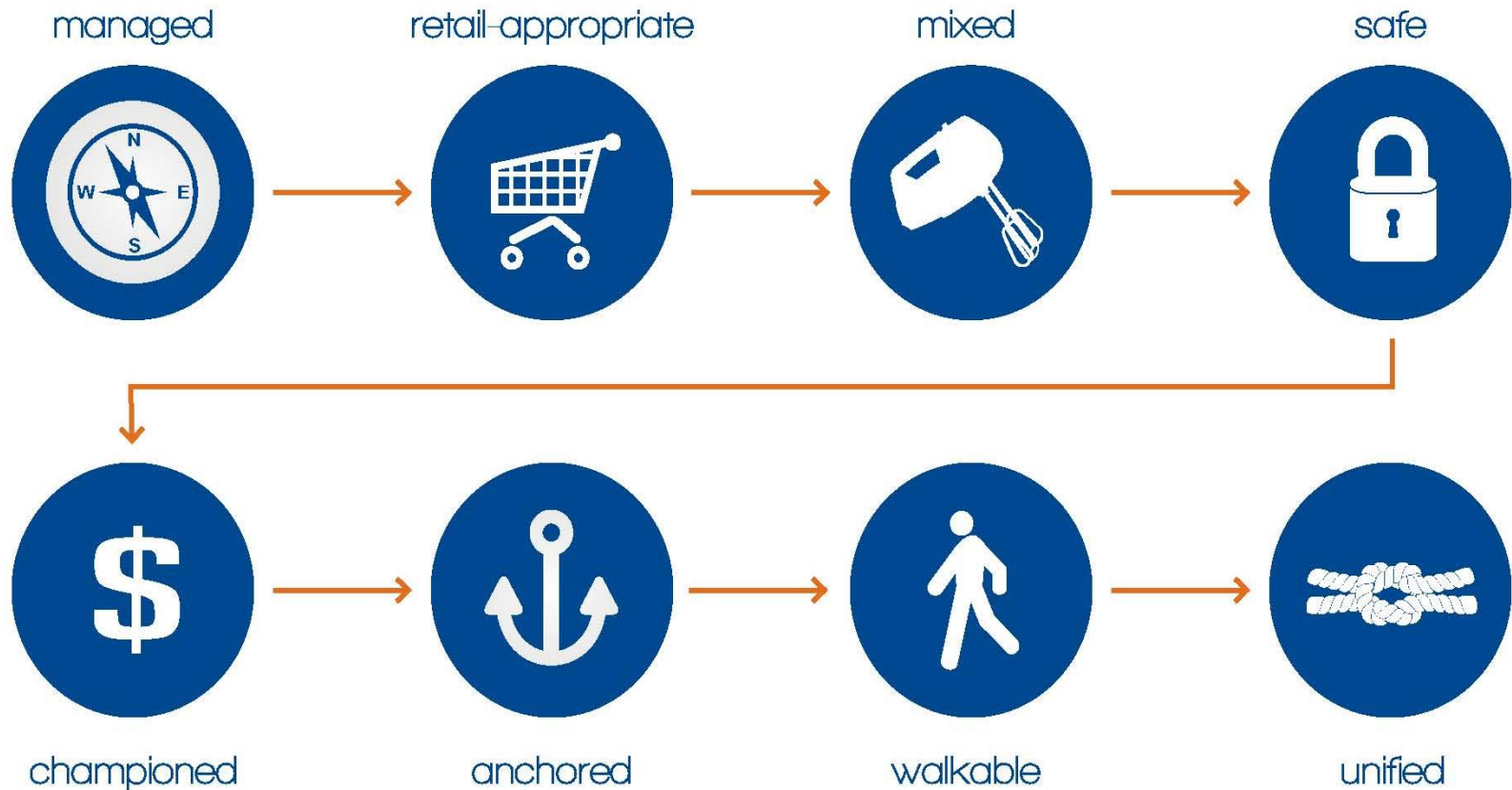
Parking Facilities

Subway/LR/Streetcar Stop

Streetscape Design

**From these streets, we extracted data in 39 different research categories.**

# Evolution of Retail Streets





## STARTING POINT EVALUATION:

No two streets are alike. The Vibrant Streets Toolkit was designed to aid commercial districts that are emerging as well as established environments. Your answers to the following questions will indicate where your efforts to encourage, revive, or reestablish great retail should begin.

Does your neighborhood have an active business improvement district (BID), Main Street program, merchants' association, non-profit organization, or assigned committee on a community or civic association that oversees business activity in your retail district?  YES  NO

Is there one firm or individual who owns a majority of the parcels included in your retail district?  YES  NO

*If you have answered NO to any of these questions, your Vibrant Street initiative will begin with*  
**Item #1: MANAGED.**

Are fewer than 10 percent of storefronts occupied by establishments other than restaurants or stores, such as banks, offices, or educational/religious institutions?  YES  NO

In your estimation, are less than 20 percent of the retail spaces in your district vacant?  YES  NO

*If you have answered NO to any of these questions, your Vibrant Street initiative will begin with*  
**Item #2: RETAIL-APPROPRIATE.**

# Inventory Documents: Glossary of Terms

neighborhood goods & services (NG&S)



- Grocery
- Pharmacy
- Florist
- Dry Cleaners
- Nail/Hair Salon
- Wine/Liquor Store

## Basic Needs



# Inventory Documents: Glossary of Terms

food & beverage  
(F&B)



- Restaurant
- Cafe
- Bar
- Coffee Shop
- Sub Shop
- Ice Cream Store
- Fast Food



## Dining Out

# Inventory Documents: Glossary of Terms

general merchandise, apparel,  
furnishings & other (GAFO)



- Clothing Store
- Shoe Store
- Furniture Store
- Electronics Store
- Jewelry Store
- Bookstore
- Home Décor Store
- Hardware Store
- Card Store
- Office Supplies Store
- Pet Store
- Toy Store
- Discount Variety Store
- Thrift Store

# Customer Support Areas

SHIPPING  
SITE

SHOPPING FOR  
A BIRTHDAY PRESENT

SHOPPING FOR  
A BIRTHDAY PRESENT





# Inventory Documents: Glossary of Terms



## Retail-appropriate space

- Ground-level space
- Originally built as a storefront
- Could be easily converted to a retail use



## Non-retail uses

- Offices (doctor's, travel agents, bail bonds, check cashing, tax preparation)
- Churches, educational facilities, daycare
- Gyms, funeral homes, radio stations



# Inventory Documents: Glossary of Terms



retail-appropriate space

HEIGHT:  
14 feet +  
Floor to Ceiling

WIDTH:  
20 feet  
(or 20-25 foot bays)

DEPTH:  
45 to 90 feet

# Retail by Class of Space



Class A



Class B



Class C



BTS



# Focus on Fort Totten

## Riggs and South Dakota Avenues

# Fort Totten Vibrant Retail Streets Boundary





# 2015 Vibrant Streets Process



- Understanding Retail Economics (Retail 101)
- Communicate this Understanding (Train the Translator)
- Identifying a reality-based approach to talking retail issues (Implementation)



This is not about **MARKETING** your Vibrant Street...

It's about identifying incremental changes in your neighborhood that make your retail street more compelling for improvement, growth, development, redevelopment, or all of the above.

# Vibrant Streets Formula for Success

**We are  
experts on  
Vibrant  
Streets**

**+**

**You are  
experts on  
your  
neighborhood**

**=**

**Solutions to  
improve your  
neighborhood**

# Fort Totten Stores, Services, and Eateries





# Impact of New Projects on Retail Markets

New Apartments,  
Townhomes, Houses  
New Hotel Rooms  
New Offices



Increase in  
Customers and  
Expenditures



**MORE  
DEMAND**

New Retail Spaces



Increase in  
Competition



**MORE  
SUPPLY**

# Fort Totten Square

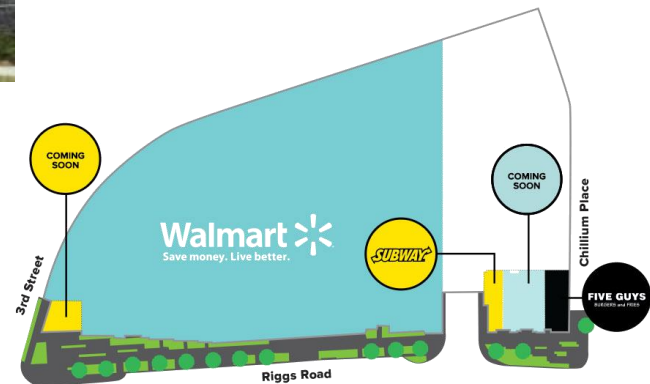


## Phase I

- 345 apartments
- 130,000 sf of retail (incl. 120k Walmart)

## Phase II (Proposed)

- 170 townhomes
- 27,000 sf of retail







# Art Place at Fort Totten



- 929 apartments
- 300,000 sf of retail
- Children's Museum
- Cultural and art spaces



# Art Place at Fort Totten

- PLAN LEGEND**
- PARKING AREA
  - CIRCULATION/ UTILITY
  - LOADING/ SERVICE
  - IN-LINE RETAIL
  - ANCHOR RETAIL
  - FLEXIBLE USE
  - RESIDENTIAL
  - DAY CARE





# Fort Totten VRS Technical Assistance

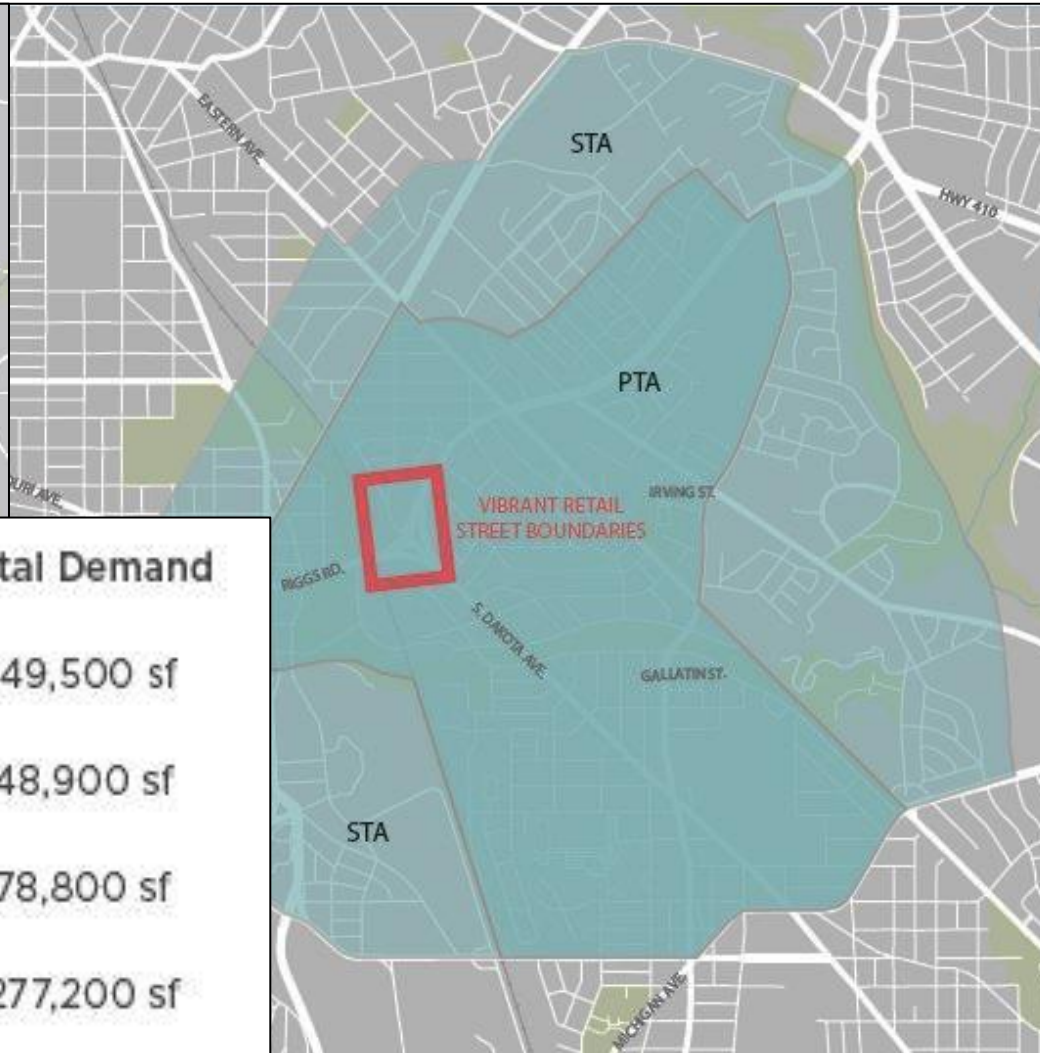
# Fort Totten VRS Technical Assistance



## CUSTOMIZED FOLLOW-UP

- Mini Market Assessment (determine the opportunities to capture retail spending in the neighborhood)
- Lamond-Riggs Development Task Force Presentation

# Fort Totten Mini Market Assessment



Category	Total Demand
Neighborhood Goods & Services	149,500 sf
Food & Beverage	48,900 sf
GAFO	78,800 sf
<b>Total Retail Demand</b>	<b>277,200 sf</b>



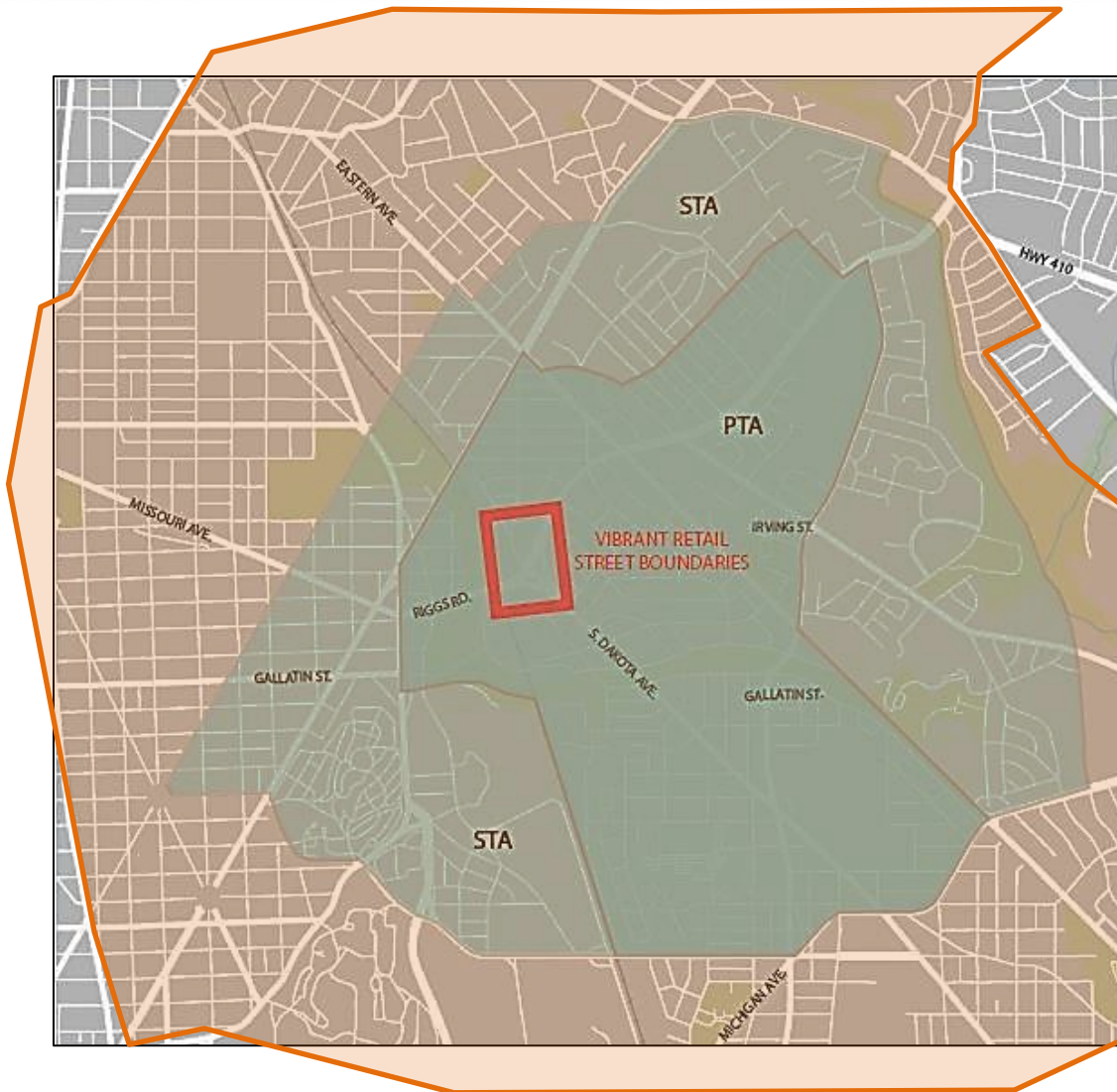
# The Walmart Impact (Part 1)

Market Category	SF
Total Existing Retail Demand	277,200
Add'l Demand Created by New Population from New Development	32,000
<b>SUBTOTAL DEMAND</b>	<b>309,200</b>
Total Revised Retail Demand	440,200



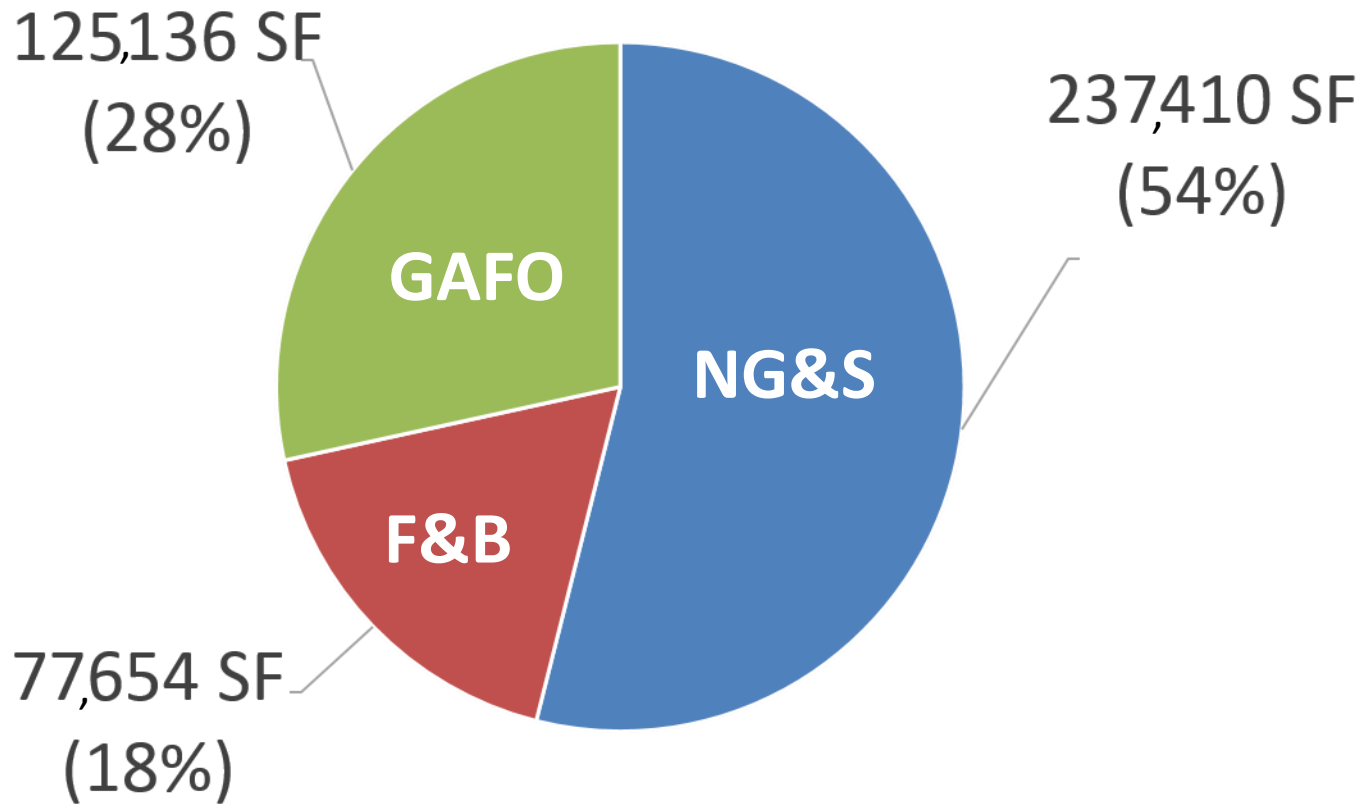
SOURCE: Streetsense, WDCEP, DMPED, Claritas, Next Stop Riggs blog, ICSC

# The Walmart Impact (Part 2)

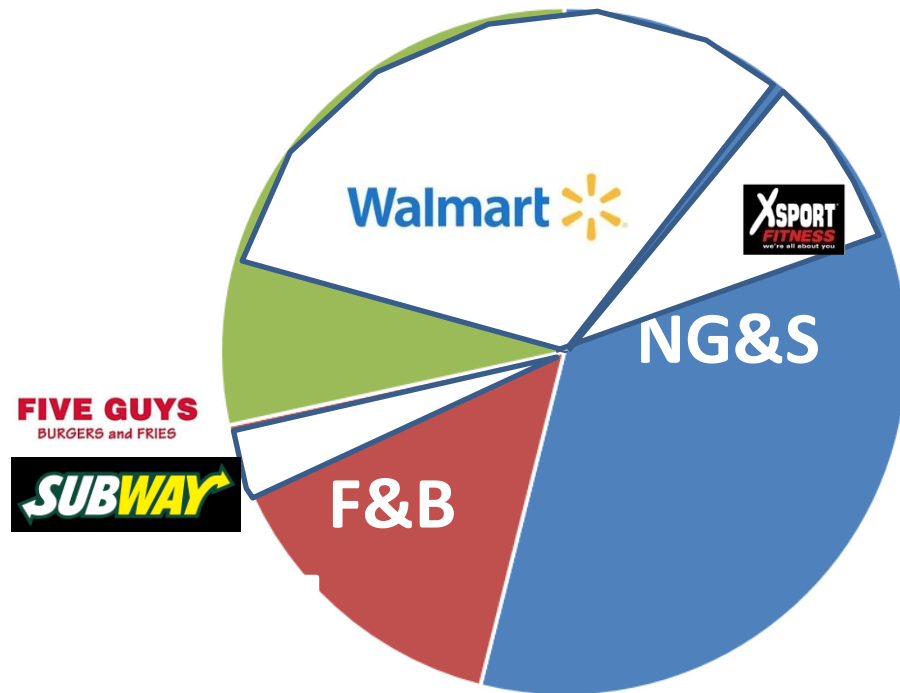


- Creates a tertiary trade area (TTA)
- Draws “super neighborhood” expenditures to the neighborhood
- Increases the customer profile of Fort Totten further and wider than previously
- Has retail demand impacts

# Ft. Totten's Retail Demand by Categories



# Ft. Totten's Future (Known) Retail Supply – Probable Tenants





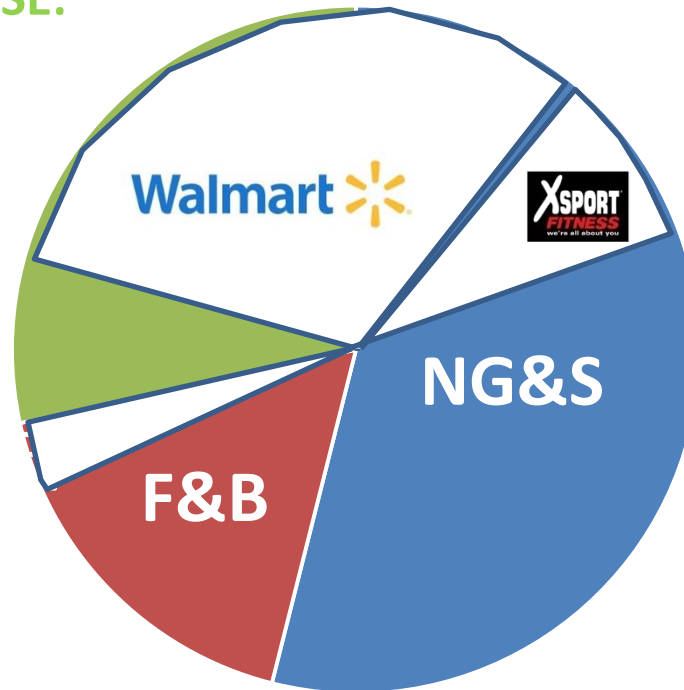
# Ft. Totten's Future Retail Supply – Suggested Tenant Mix

## GENERAL MERCHANDISE:

- A few small shops  
*(currently no obvious spaces for a junior anchor)*

## FOOD & BEVERAGE:

- 1-3 full-service restaurants
- 5-7 quick service eateries
- 3-5 take away service eateries



## NEIGHBORHOOD GOODS & SERVICES:

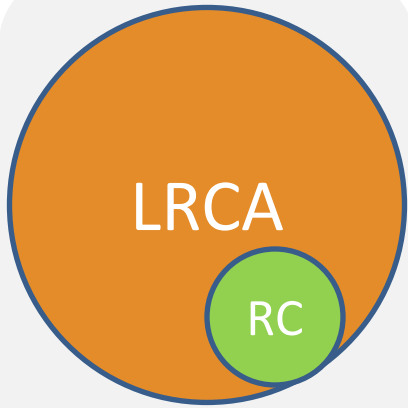
- Gourmet/organic grocery
- Drugstore/Pharmacy
- Children's activity center
- Hair/nail salon
- Dry cleaner

## WAYS TO IMPACT RETAIL ATTRACTION:

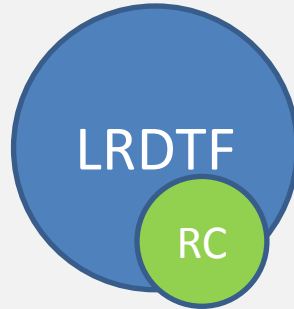
- Giving the retail market time to “prove” itself to other tenants. Trumpet success!
- Encouraging developers to be ambitious in their tenanting strategies – but don’t be unrealistic.
- Understanding that, even with retail demand, tenants can’t go “anywhere.”
- Supporting office development when market improves to bolster F&B demand
- Identifying entrepreneurial spirit in your neighborhood.

- Nearly a half-million square feet of retail arriving in Fort Totten in a 3-5 year period (roughly equal to a small regional shopping mall).
- The anticipated retail development has the potential to be transformative for the neighborhood, but there is a need to be practical and set expectations appropriately.
- Retailers will be most successful if they enter Fort Totten with an organizational framework in place.
- Therefore...

# Options for Retail Structure



Retail  
Committee (RC)  
as part of  
Lamond-Riggs  
Citizens  
Association



Retail  
Committee (RC)  
as part of  
Lamond-Riggs  
Development  
Task Force



Retail  
Committee (RC)  
as a business  
association



DC Main Street



Thank you.



# Questions and Next Steps

# Contact Information

## DC Office of Planning

Sakina Khan

[Sakina.Khan@dc.gov](mailto:Sakina.Khan@dc.gov)

202.442.7600

Malaika Abernathy

[Malaika.Abernathy@dc.gov](mailto:Malaika.Abernathy@dc.gov)

202.442.7600

Colleen Willger

[Colleen.Willger@dc.gov](mailto:Colleen.Willger@dc.gov)

202.442.7600

## Streetsense

Heather Arnold

[Harnold@Streetsense.com](mailto:Harnold@Streetsense.com)

301.652.9020