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Source: Van Ness Main Street
PROJECT OVERVIEW

NEIGHBORHOOD OVERVIEW

VAN NESS RETAIL

PROPERTY TENANTING STRATEGY

PLACEMAKING/BRANDING STRATEGY
Goal

Create a distinctive neighborhood retail experience in Van Ness that contributes to a sense of place and serves the needs of residents, students, and workers.
Opportunity

Strengthening retail can shape the future of Van Ness by creating a place that:

- Provides amenities and enhances quality of life for those living, working and going to school in Van Ness.
- Brings new investment to Van Ness.
- Attracts residents and visitors from outside the area.
- Reinvigorates Connecticut Avenue as an active community gathering space.
Project Methodology

1. Evaluate current market conditions and existing supply of retail in Van Ness.

2. Identify key drivers of demand to determine missing uses or opportunities in the market.

3. Set a strategic direction to reinforce Van Ness as a desirable, walkable, commercial area.

4. Develop a tenanting plan to reposition vacant and underutilized properties in Van Ness.
PROJECT OVERVIEW

NEIGHBORHOOD OVERVIEW

VAN NESS RETAIL

PROPERTY TENANTING STRATEGY

PLACEMAKING/BRANDING STRATEGY
Neighborhood Overview: Study Area

The heart of the Van Ness Retail Corridor is between Tilden Street and Albemarle Street.
Neighborhood Overview: History

HR&A’s retail strategy builds on initial actions taken recently to improve the retail and commercial district along Connecticut Avenue in Van Ness.

Neighbors gathered to assess Van Ness strengths and weaknesses

2013
Feb. 2013
Van Ness Vision Committee formed

2014

March 2015
Van Ness Main Street incorporated

2015

April 2016
Van Ness Commercial District Action Strategy released

2016

Green Infrastructure & Pavement Removal Strategy developed

2017

Sept. 2016
Status and condition of restaurants assessed

Development of Van Ness Retail Strategy
The neighborhood brings together a diverse set of consumers and stakeholders, which benefit retail in the area.

**Affluent residential base**

The median household income of residents is $114,000, 33% higher than in Washington, DC. More than a quarter of the 9,000 households earn at least $200,000 per year.

**Students and faculty**

UDC and Howard enroll more than 5,200 students and bring an additional 1,300 faculty and staff to the neighborhood.

**Embassy presence**

The more than 20 diplomatic embassies in Van Ness enhance the international character of the neighborhood and bring a large number of visitors annually.

**Proactive stakeholder groups**

Van Ness benefits from a dedicated group of stakeholders who are actively working to improve the neighborhood. UDC is actively working to promote an on-campus environment through increased investment.

Note: Median household income is based on households within HR&A’s defined primary trade area, roughly defined as a boundary of the Van Ness neighborhood. Source: ESRI, University of the District of Columbia, Howard University, HR&A
Neighborhood Overview: Assets

Residential demographics in the Van Ness neighborhood provide a strong customer base for higher-quality shops and services.

<table>
<thead>
<tr>
<th>Resident population</th>
<th>14,600</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of households</td>
<td>8,700</td>
</tr>
<tr>
<td>Families</td>
<td>2,400</td>
</tr>
<tr>
<td>Median household income</td>
<td>$114,000</td>
</tr>
<tr>
<td>Median age</td>
<td>37</td>
</tr>
<tr>
<td>Share of renter-occupied households</td>
<td>64%</td>
</tr>
</tbody>
</table>

Source: ESRI, HR&A
A number of new and noteworthy specialty food stores and restaurants have recently opened along Connecticut Avenue and attracted interest from local residents as well as those outside the neighborhood.

New restaurant and commercial activity

As a major, high-visibility vehicular connection between Maryland and Downtown DC, Connecticut Avenue carries 38,000 vehicles through the neighborhood daily.

High visibility

A centrally-located Metro stop draws 5,300 riders each weekday, similar to ridership at stations such as Tenleytown, Shaw, and Mt. Vernon Square. The neighborhood also has a walk score of 85, indicating it is walkable and most errands can be accomplished on foot.

Good transit connectivity and walkability

Van Ness Retail Strategy | 12
Source: WMATA, ESRI, Walk Score, HR&A
Neighborhood Overview: Challenges

There are a number of challenges impacting the retail environment and the overall sense of place.

**Lack of continuous storefronts**

Gaps in storefronts created by building setbacks, auto drive-throughs, and non-commercial first floor uses dilute the sense of retail concentration.

**Underutilized public spaces**

Public spaces are not designed for gathering, creating an environment that is neither engaging nor vibrant.

**Diverse property ownership**

A diverse set of property owners and interests limits the ability to reposition retail in the corridor in the near-term.

**Decreasing office employment**

Recent and pending large office tenant departures decrease employee population, negatively impacting retail sales potential.
Neighborhood Overview: Challenges

Citywide development and the evolving nature of retail will impact how retail in Van Ness will compete moving forward.

Experience Based Retail

The development of areas such as 14th Street and the newly constructed Wharf represent a broader trend toward experience-based retail that draws people from across the region.

Urban-Format Big Box Retail

Planned retail openings throughout northwest DC will draw potential spending from Van Ness. New retailers opening in nearby neighborhoods include national brands such as Target, Trader Joe’s and Wegmans.

Online Retail

Neighborhood retail is evolving at a worldwide scale due to the influence of e-commerce. Brick and mortar shops face increasing pressure to better compete and offer something that cannot be purchased online.
PROJECT OVERVIEW
NEIGHBORHOOD OVERVIEW
VAN NESS RETAIL
RETAIL SUPPLY
RETAIL DEMAND
PROPERTY TENANTING STRATEGY
PLACEMAKING/BRANDING STRATEGY
Van Ness Retail

The current retail mix in Van Ness is made up largely of convenience, service, and dining options that serve neighborhood residents, students, and workers.

130,000 SF
Total retail space*

30,000 SF
Vacant retail space

*See Appendix A for full retail inventory
Source: CoStar, Retail broker interviews, HR&A
Casual dining makes up the largest share of food and beverage space in the neighborhood.

### Van Ness Retail

- **Total food and beverage retail space**: 32,200 SF
- **Total number of food and beverage retailers**: 16
- **Casual dining space**: 10,500 SF

The chart shows the distribution of food and beverage square footage by type:

- **33%** Casual Dining
- **29%** Specialty
- **17%** Fast Food
- **10%** Liquor
- **3%** Coffee

Source: CoStar, HR&A
Van Ness Retail

Though almost a quarter of total square footage in Van Ness is vacant, it is concentrated in properties that provide an opportunity for repositioning retail.

4225 Connecticut Ave. | 14,470 RSF
This two-story space formerly occupied by Walgreens may be leased to an institutional entity, but would likely still offer space for retail use. The building includes a garage with approximately 30 spaces and a loading dock.

4250 Connecticut Ave. | 16,520 RSF
Retail space here will be available to be repositioned when Fannie Mae moves out in 2019. Up to 40 parking spaces may be available to retail customers and a loading dock is built to the side of the building.

4340 Connecticut Ave. | 10,320 RSF
Though currently occupied, ground floor tenants in the UDC law school include a number of temporary uses that leave most space available for repositioning.
Van Ness Retail

Recent openings at the northern end of the study area represent a shift toward higher quality food and beverage offerings.

1. **Bread Furst** | **Opened 2014**
   - Established a precedent for high-quality offerings, drawing both locals and visitors.

2. **Thai Pad** | **Opened 2015**
   - A casual lunch and dinner option serving neighborhood residents and office workers.

3. **Soapstone Market** | **Opened 2016**
   - A neighborhood market, deli, and bar serving as a community gathering spot.

4. **Sfoglina** | **Opened 2016**
   - An upscale-Italian eatery that has generated buzz as a 2018 Michelin Bib Gourmand restaurant.
Competitive Landscape

A number of neighborhoods have retail nodes that cater to the local population, as well as attract nearby residents, including those from Van Ness.

1. **Chevy Chase**
   - Notable tenants: Blue 44 Restaurant and Bar, The Avalon Theatre, Barston's Child's Play

2. **Nebraska/Connecticut Ave**
   - Notable tenants: Politics and Prose, Little Red Fox, Comet Ping Pong

3. **Tenleytown**
   - Notable tenants: Best Buy, Whole Foods, The Container Store, CAVA, Panera Bread

4. **Cathedral Heights**
   - Notable tenants: Bluemercury, Core72, Chef Geoff’s, Wagshal’s

5. **Cleveland Park**
   - Notable tenants: Uptown Theater, Firehouse Bakery & Coffeehouse, Fat Pete’s BBQ, All Fired Up

6. **Woodley Park**
   - Notable tenants: Open City, Nandos, District Kitchen
Competitive Landscape

Most competitive neighborhood retail nodes benefit from building design and physical configurations that create a sense of place and enhance the environment for everyday shopping.

- **Continuity & Concentration of Storefronts**
  Most competitive retail nodes have **continuous storefronts that “guide” pedestrians along the corridor**. In contrast, Connecticut Avenue in Van Ness is punctuated by gaps in buildings, driveways, and drive-throughs.

- **Architectural Similarity**
  Architectural similarity benefits competitive nodes, as similarly-styled buildings create a **“personality” and sense of place for the street**. The building stock of Van Ness, however, includes a variety of building designs and typologies.

- **Larger Variety of Neighborhood Retail**
  Competitive retail nodes offer a **larger variety of neighborhood-serving retail options** than Van Ness, including hardware stores, florists, and children’s stores, as well as varied food and beverage options.
Competitive Landscape

Other areas, such as Bethesda, Friendship Heights, and Georgetown have a concentration of destination retailers which draw shoppers from a number of other neighborhoods.

1. **Bethesda Row**
   *Notable tenants*: Apple, Pottery Barn, Williams-Sonoma, The North Face, Lululemon, Bluemercury

2. **Friendship Heights**
   *Notable tenants*: Bloomingdales, Neiman Marcus, Saks Fifth Avenue, Ralph Lauren, Tiffany & Co., Whole Foods, Nordstrom Rack

3. **Georgetown**
   *Notable tenants*: Apple, Ralph Lauren, CB2, Brooks Brothers, Anthropologie, Kate Spade, TJ Maxx, H&M, Madewell, Zara, Bonobos, Warby Parker
In addition to existing retail, there is a notable pipeline of new retail planned in areas surrounding Van Ness that will increase retail competition.

1. **Redevelopment of Fannie Mae Headquarters**  
   - **Anchor Tenant:** Wegmans  
   - **Location:** 3900 Wisconsin Avenue  
   - **Size:** 80,000+ SF  
   - **Proposed Delivery:** 2022

2. **Redevelopment of 4000 Wisconsin Avenue**  
   - **Anchor Tenant:** Total Wine  
   - **Location:** 4000 Wisconsin Avenue  
   - **Size:** 26,000 SF  
   - **Proposed Delivery:** 2024

3. **The Glover House**  
   - **Anchor Tenant:** Trader Joe’s  
   - **Location:** 2121 Wisconsin Avenue  
   - **Size:** 20,000 SF  
   - **Proposed Delivery:** TBD

4. **Opening of Target at Sam’s Park & Shop**  
   - **Tenant:** Target  
   - **Location:** 3529 Connecticut Avenue  
   - **Size:** 17,820 SF  
   - **Proposed Delivery:** TBD
HR&A estimated spending potential for retail, based on current consumer populations of residents, students, workers, and hotel guests. Customers from different trade areas generate demand for different retail categories.

### Retail Demand Analysis

<table>
<thead>
<tr>
<th>Retail Type</th>
<th>Primary Trade Area</th>
<th>Secondary Trade Area</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Convenience Goods</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health and Personal Care, General</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Merchandise, Grocery, Specialty</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Food, Liquor Stores, Limited-Service Restaurants, Bars</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Comparison Goods</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Furniture, Electronics and Appliances,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clothing, Sporting and Hobby Goods,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Books and Music, Building Materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Full-Service Food and Beverage</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full-Service Restaurants, Specialty Food</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

Source: ESRI, HR&A
Retail Demand Analysis

HR&A identified the trade areas for Van Ness retail shops and services.

**Primary Trade Area**
Roughly bounded by Broad Branch Road NW to the North, 37th Street NW to the West, Rodman Street NW to the South, and Rock Creek Park to the East.

**Secondary Trade Area**
Defined as a two-mile radius for land west of Rock Creek Park.

Source: ESRI, HR&A
HR&A looked at spending potential of Primary Trade Area residents, students, office workers, and hotel guests to estimate the total retail spending potential in Van Ness.

**Resident Spending**
- **14,600 Residents**
  - **$114,000 median household income**

**Student Spending**
- **5,200 Students**
  - **$2,900 annual student spending**

**Worker Spending**
- **3,500 Workers**
  - **$71,000 average salary**

**Hotel Guest Spending**
- **36,000 Hotel Guests**
  - **$135 average food/retail spending per trip**

Note: Estimated student spending is based on HR&A student spending data and accounts for full-time and part-time status of students.

Source: ESRI, U.S. Census Bureau, EMSI, University of the District of Columbia, Howard University, Destination DC, HR&A
Together, consumers in the Primary Trade Area represent significant spending potential.

**Retail Demand Analysis**

- **Residents**: $421.9M Spending Potential
- **Students**: $14.2M Spending Potential
- **Workers**: $16.9M Spending Potential
- **Hotel Guests**: $4.8M Spending Potential

**Total spending potential**: $457.8M
Retail Demand Analysis

The retail gap is the difference between the spending potential and actual sales, and can be used to determine the additional supportable square footage in a trade area.

Supportable square footage does not represent what should be built, but rather is representative of additional space that can be supported when considering the retail gap in the trade area. The share of total supportable square footage that can be captured by Van Ness is dependent on the tenant mix and quality of retail offerings in the neighborhood and retail competition in nearby areas.
## Retail Demand Analysis

There is a significant retail gap in Primary Trade Area spending, indicating that customers are leaving the area for a large share of their retail needs.

<table>
<thead>
<tr>
<th>Convenience Goods</th>
<th>Spending Potential ($M)</th>
<th>Existing Sales ($M)</th>
<th>Retail Gap ($M)</th>
<th>Supportable SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grocery</td>
<td>$90</td>
<td>$29</td>
<td>$61</td>
<td>88,000</td>
</tr>
<tr>
<td>Specialty Food</td>
<td>$6</td>
<td>$0</td>
<td>$6</td>
<td>7,000</td>
</tr>
<tr>
<td>Beer, Wine &amp; Liquor</td>
<td>$11</td>
<td>$1</td>
<td>$10</td>
<td>26,000</td>
</tr>
<tr>
<td>General Merchandise</td>
<td>$69</td>
<td>$0</td>
<td>$69</td>
<td>233,000</td>
</tr>
<tr>
<td>Limited-Service Restaurants</td>
<td>$39</td>
<td>$6</td>
<td>$33</td>
<td>68,000</td>
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<tr>
<td>Bars</td>
<td>$6</td>
<td>$0</td>
<td>$6</td>
<td>13,000</td>
</tr>
<tr>
<td>Health &amp; Personal Care</td>
<td>$46</td>
<td>$6</td>
<td>$40</td>
<td>57,000</td>
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<tr>
<td>Misc. Store Retailers</td>
<td>$21</td>
<td>$3</td>
<td>$18</td>
<td>60,000</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$288</td>
<td>$44</td>
<td>$243</td>
<td>552,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Destination Goods</th>
<th>Spending Potential ($M)</th>
<th>Existing Sales ($M)</th>
<th>Retail Gap ($M)</th>
<th>Supportable SF</th>
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<tbody>
<tr>
<td>Full-Service Restaurants</td>
<td>$37</td>
<td>$6</td>
<td>$31</td>
<td>57,000</td>
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<td>Clothing</td>
<td>$48</td>
<td>$0</td>
<td>$48</td>
<td>65,000</td>
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<td>Sporting, Hobby, Book &amp; Music</td>
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<td>$13</td>
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<tr>
<td>Building Supplies</td>
<td>$23</td>
<td>$0</td>
<td>$23</td>
<td>74,000</td>
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<tr>
<td>Electronics &amp; Appliance</td>
<td>$22</td>
<td>$1</td>
<td>$21</td>
<td>23,000</td>
</tr>
<tr>
<td>Furniture &amp; Home Furnishings</td>
<td>$22</td>
<td>$1</td>
<td>$21</td>
<td>46,000</td>
</tr>
<tr>
<td>Special Food Services</td>
<td>$1</td>
<td>$0</td>
<td>$1</td>
<td>2,000</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$170</td>
<td>$21</td>
<td>$149</td>
<td>278,000</td>
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</tbody>
</table>

Retail Demand Analysis

With a retail gap of almost $400 million in the Primary Trade Area and an additional $148 million in spending potential from other sources, there is sufficient support for retail space in Van Ness.

$392M  
Primary Trade Area

$15M  
Occupation of 4000 Connecticut building

$133M  
Secondary trade area food and beverage

$392M  
Total retail gap

$148M  
Additional spending potential
PROJECT OVERVIEW
NEIGHBORHOOD OVERVIEW
VAN NESS RETAIL
PROPERTY TENANTING STRATEGY
PLACEMAKING/BRANDING STRATEGY
Tenanting Strategy: Overview

Based on the results of HR&A’s retail gap analysis, as well as overall trends in retailing, the following are guidelines for near- and long-term tenanting.

1. The significant retail gap in the Primary Trade Area indicates that there is sufficient demand to support an active retail environment in Van Ness.

2. The existence of a gap for all retail types suggests that there is a wide variety of new retailers that could enter the market and better position retail in Van Ness.

3. Given strong competition from regional malls and neighborhoods with national tenants, retail in Van Ness needs to focus on distinctive local shops and services.

4. Tenants that are less impacted by e-commerce, such as dining services and experiential retail, are more likely to succeed than those facing significant online competition.

5. Capturing spending from outside the Primary Trade Area could further strengthen retail in Van Ness, but requires tenants that are seen as destinations in their own right.
Tenancing Strategy: Overview

Five factors informed HR&A’s recommendations for retail types and tenants to reposition vacant and underutilized spaces.

1. **Customers** — The diverse customer base in Van Ness requires tenants with **broad appeal at varying price points**.

2. **Clustering** — Clustering retail to make Van Ness feel like a **continuous retail strip** requires a number of small- to medium-sized stores, rather than a few large tenants that diminish the pedestrian experience.

3. **Synergies Among Tenants** — Retailers and restaurants like to be **positioned near other tenants** that sell goods of a similar or complimentary nature.

4. **Economic Viability** — Tenants must be **positioned for financial success**, based on consumer demand, fit within the existing mix of tenants in Van Ness, and the ability to compete with nearby stores and online options.

5. **Seasonality** — Tenanting must take into account seasonal **changes in customers**, such as when UDC and Howard break for summer and holidays.
Tenanting Strategy: Clustering

Three properties with current or future vacancies present an opportunity for repositioning to create unique retail clusters along Connecticut Avenue.
PROJECT OVERVIEW
NEIGHBORHOOD OVERVIEW
VAN NESS RETAIL

PROPERTY TENANTING STRATEGY
4250 CONNECTICUT
4340 CONNECTICUT
4225 CONNECTICUT

PLACEMAKING/BRANDING STRATEGY
Property Overview: 4250 Connecticut

Total retail rentable square feet: 16,520 RSF

Additional space:
- Core area: 4,810 NSF
- Loading area: 2,370 NSF
- Office space: 2,020 NSF

Ceiling height: 12’3” to 16’3”
Retail depth: 90’10” to 110’10”
Other: Kitchen, 40 parking spots

Current tenants: Starbucks, Eva Realty, LLC

Background: Fannie Mae currently occupies the offices in this building, and has control over ground-level leasing. The company will move from the building when its lease expires in 2019, at which point vacant or underutilized spaces can be repositioned.
Potential Tenenting: 4250 Connecticut

Retail should take advantage of proximity to Metro and the existing convenience cluster of CVS, Giant, and Calvert Woodley by featuring multiple venues that have broad appeal, including both food and non-food uses.

Dining options should attract all consumers, including families seeking a comfortable dining environment. Fast-casual food options have broad appeal and would serve residents, students, and workers. Adjacency to Rock Creek Park and the popularity of biking and running will attract a wide variety of customers.

Metro commuters would benefit from a convenient location to purchase glasses and contact lenses. A beauty and cosmetics retailer would attract residents and metro commuters looking for a local alternative to national chains. Spaces without street frontage are well suited for specialized office use, as they do not require high visibility.

Note: Concepts and ideas shown are representative of HR&A’s recommended tenenting strategy. Actual tenanting is dependent on future retail market conditions and the actions of property owners.
Potential Tenanting: 4250 Connecticut

Food uses should be prioritized for spaces where existing kitchen infrastructure exists, using the deep floorplates of the building to accommodate back of house needs.

### Recommended Tenanting of Spaces and Example Tenants

**Family-Friendly Restaurant**
$$
- Busboys & Poets
- Ted's Bulletin
- Matchbox
- Half-Smoke

**Fast-Casual / Healthy Eating**
$$$
- Sweetgreen
- Chop’t
- Cava
- &pizza

Note: Concepts and ideas shown are representative of HR&A’s recommended tenanting strategy. Actual tenanting is dependent on future retail market conditions and the actions of property owners. A pricing scale of one to four dollar signs is used to indicate anticipated price point of each recommended retail type.
Potential Tenancing: 4250 Connecticut

Non-food retail uses should be targeted for small and shallow spaces, while specialized office uses, which do not rely on high visibility, should be located in the rear of the building.

### Recommended Tenancing of Spaces and Example Tenants

<table>
<thead>
<tr>
<th>Office</th>
<th>2,200 SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Optical Store</td>
<td>$$-$$$$</td>
</tr>
<tr>
<td>Beauty/Cosmetics</td>
<td>$$-$$$$</td>
</tr>
</tbody>
</table>

**Fitness Retail**

- Fitness Retail
  - Bicycle Space
  - City Bikes
  - Pacers Running

**Specialized Office**

- Medical office
- Dental office
- Legal office

**Optical Store**

- Blink Optical
- SEE

**Beauty/Cosmetics**

- Follain
- Be Clean
- Lather

Note: Concepts and ideas shown are representative of HR&A’s recommended tenancing strategy. Actual tenancing is dependent on future retail market conditions and the actions of property owners. A pricing scale of one to four dollar signs is used to indicate anticipated price point of each recommended retail type.
Physical Changes: 4250 Connecticut

Repositioning retail may require adjusting space sizes to accommodate tenant requirements.

Potential alterations to existing tenant spaces
HR&A recommends reconfiguring the existing space to meet typical retail configurations. The depth of retail spaces should be reduced to approximately 60-75 feet from storefront for non-food tenants. Rear building space can be converted to office and medical uses.

Accommodating food and beverage tenants
Existing kitchen and venting systems are located in the rear of both the south and north sides of the building, reducing the cost of fitting out a space for food and beverage tenants. Provision should be made for outdoor restaurant seating where possible.

Additional considerations
Proper secondary egress must be considered if depth of retail space is adjusted. Providing access to the office space as well as some signage along Connecticut Avenue will make spaces easier to lease.
Property Overview: 4340 Connecticut

Total rentable square feet: 10,320 RSF
Additional space:
  • Core area: 4,530 NSF
  • Office area: 2,300 NSF
Ceiling height: 21’0”
Retail depth: 81’ to 92’5”
Other: Kitchen

Current tenants: Acacia Bistro, Cleveland Park Library, UDC National Alumni Office, Van Ness Main Street Office

Background: Aside from Acacia Bistro, current tenants of the ground floor space in 4340 Connecticut are temporary uses that can be considered for repositioning into new retail opportunities.
Potential Tenanning: 4340 Connecticut

Retail in 4340 Connecticut should appeal to the high-income residents, building on the success of Sfoglina and Bread Furst to create a dining destination and complementary specialty retail cluster.

**High-End Restaurant**
Avg. Size: 2,500-4,000 SF
High-end dining would attract customers from both within and outside of the neighborhood for a night out.

**Café**
Avg. Size: 1,000-3,000 SF
Van Ness residents, students, and workers would use a café as a community gathering point.

**Children’s Boutique**
Avg. Size: 1,000-2,000 SF
A children’s clothing and toy store would serve neighborhood households with young children.

**Artisan Jeweler/ Curated Gifts**
Avg. Size: 500-1,500 SF
Small goods shops can draw consumers for browsing before or after eating in the neighborhood.

**Pet Store & Services**
Avg. Size: 1,500-2,500 SF
A pet store, offering services such as grooming or pet day care, would serve residents and avoid online competition.

Note: Concepts and ideas shown are representative of HR&A’s recommended tenanting strategy. Actual tenanting is dependent on future retail market conditions and the actions of property owners.
Potential Tenancing: 4340 Connecticut

Food uses should anchor the corner spaces in 4340 Connecticut in order draw foot traffic to the building.

RECOMMENDED TENANTING OF SPACES AND EXAMPLE TENANTS

High-End
Sit-Down Restaurant/
Cocktail Lounge

$$$
Bidwell
Rasika

Café

$-$$
Northside Social
Emissary
Slipstream DC

Note: Concepts and ideas shown are representative of HR&A’s recommended tenanting strategy. Actual tenanting is dependent on future retail market conditions and the actions of property owners. A pricing scale of one to four dollar signs is used to indicate anticipated price point of each recommended retail type.
Potential Tenanting: 4340 Connecticut

Non-food uses should occupy in-line spaces in 4340 Connecticut.

RECOMMENDED TENANTING OF SPACES AND EXAMPLE TENANTS

<table>
<thead>
<tr>
<th>Space Size</th>
<th>Recommended Tenanting</th>
</tr>
</thead>
<tbody>
<tr>
<td>2,700 SF</td>
<td>Pet Store &amp; Services</td>
</tr>
<tr>
<td>2,500 SF</td>
<td>Artisan Jeweler and Curated Accessories / Gift</td>
</tr>
<tr>
<td>2,300 NSF</td>
<td>Office</td>
</tr>
<tr>
<td>2,150 NSF</td>
<td>CIRCULATION</td>
</tr>
<tr>
<td>3,240 SF</td>
<td>3,570 NSF</td>
</tr>
<tr>
<td>1,400 SF</td>
<td>Children’s Clothing</td>
</tr>
<tr>
<td>1,400 SF</td>
<td>$-$$$</td>
</tr>
<tr>
<td>1,800 SF</td>
<td>Unleashed by Petco</td>
</tr>
<tr>
<td>1,800 SF</td>
<td>Metro Mutts</td>
</tr>
<tr>
<td>1,400 SF</td>
<td>Children’s Clothing</td>
</tr>
<tr>
<td>1,400 SF</td>
<td>$-$$$</td>
</tr>
<tr>
<td>1,800 SF</td>
<td>Dawn Price Baby</td>
</tr>
<tr>
<td>1,800 SF</td>
<td>Full of Beans</td>
</tr>
</tbody>
</table>

Note: Concepts and ideas shown are representative of HR&A’s recommended tenanting strategy. Actual tenanting is dependent on future retail market conditions and the actions of property owners. A pricing scale of one to four dollar signs is used to indicate anticipated price point of each recommended retail type.
**Physical Changes: 4340 Connecticut**

Extending storefronts to the building line will increase the leasing potential of retail spaces.

**Potential alterations to existing tenant spaces**
While the ground floor of 4340 Connecticut is currently divided into four spaces, consideration should be given to further divisions. The layout of spaces will likely require some adjustments dependent on final tenanting, but existing layouts could remain in place if needed.

**Accommodating food and beverage tenants**
A kitchen and venting system exists in north end of building, which will reduce costs if a food and beverage retailer occupies the space. Equipment would need to be installed if a food and beverage tenant were to occupy other spaces within the building. Provision should be made for outdoor café seating where possible.

**Realigning storefronts**
HR&A recommends bringing storefronts to the building line, which will create a more inviting building façade, enhanced visibility, and be more attractive to prospective tenants.
PROJECT OVERVIEW
NEIGHBORHOOD OVERVIEW
VAN NESS RETAIL
PROPERTY TENANTING STRATEGY
4250 CONNECTICUT
4340 CONNECTICUT
4225 CONNECTICUT
PLACEMAKING/BRANDING STRATEGY
Property Overview: 4225 Connecticut

Total rentable square feet: 14,470 RSF, two floors

Additional space:
- Core area: 1,170 NSF
- Loading area: 640 NSF

Ceiling height: 16'0" to 17'0"
Retail depth: 92’6"
Other: 30 parking spots

Current tenants: N/A

Background: Should an institutional user lease the building, it is likely that they would provide some ground level space for retail use. This study considers two repositioning scenarios, one in which a smaller portion of the ground floor is leased for retail use and one in which the entire building is leased for retail use.
Potential Tenanting: 4225 Connecticut

Across from UDC’s campus, and near the CVS/Giant center, retail should be repositioned to appeal to university students and employees, as well as the broader community that might be arriving by car.

**RECOMMENDED TENANTING OF SPACES AND RETAILER TYPES**

**First Floor – Scenario One**

- **Café / Coffee**
  - Avg. Size: 700-2,500 SF
  - A neighborhood café would be geared toward students, but attract residents and workers as well.

- **Art Gallery**
  - Avg. Size: 1,200-4,000 SF
  - An art gallery would benefit local artists, and holds potential for partnership with UDC.

- **Performance Space**
  - Avg. Size: 2,000-5,000 SF
  - A space attracting local groups would be an amenity for students and residents, and would attract consumers from outside the neighborhood.

- **Wawa**
  - Avg. Size: 2,000-4,000 SF
  - Students, office workers and residents would enjoy a neighborhood Wawa store for convenient lunch and snack options.

Note: Concepts and ideas shown are representative of HR&A’s recommended tenanting strategy. Actual tenanting is dependent on future retail market conditions and the actions of property owners.
Potential Tenenting: 4225 Connecticut

A large format tenant that could take advantage of the multi-level space would benefit from the availability of parking and loading at the building.

**RECOMMENDED TENANTING OF SPACES AND RETAILER TYPES**

**First Floor – Scenario Two**

- **Hardware Store**
  - Avg. Size: 8,000-12,000 SF
  - A hardware store, also featuring a stationery / office supply section, would meet basic resident and student needs.

- **Fitness**
  - Avg. Size: 12,000-20,000 SF
  - Although there are existing fitness options, there is opportunity to serve a different demographic interested in health.

- **Multi-Concept Pop-Up**
  - Avg. Size: 8,000-12,000 SF
  - A permanent collection of shops offering a variety of destination goods serves residents, and would attract visitors from outside the neighborhood.

- **International Food Market**
  - Avg. Size: 8,000-15,000 SF
  - An international food market would serve the diverse population of local embassies while also providing unique offerings to residents.

Note: Concepts and ideas shown are representative of HR&A’s recommended tenanting strategy. Actual tenanting is dependent on future retail market conditions and the actions of property owners.
Physical Changes: 4225 Connecticut

Structural changes required for 4225 Connecticut are highly dependent on whether this space remains dedicated to retail use or incorporates other uses.

Potential alterations to existing tenant spaces
4225 Connecticut is currently built for use by a single tenant. Should some portion of the building ultimately be used for non-retail purposes, any space allocated to retail would require appropriate division from other uses. This study considers both a subdivided space for retail, scenario one, and single retail tenant use, scenario two.

Accommodating food and beverage tenants
There is not currently any kitchen or venting system for food uses. As a result, a kitchen or venting system would need to be installed to accommodate any food tenant in this space, which could add significant cost to attract a tenant.

Additional structural considerations
A second entrance could be added to the front of the building facing Connecticut Avenue, contingent upon future building use and the need for two entrances. Provision should be made for outdoor restaurant seating, where possible, if a food and beverage tenant is secured.
PROJECT OVERVIEW
NEIGHBORHOOD OVERVIEW
VAN NESS RETAIL
PROPERTY TENANTING STRATEGY
PLACEMAKING/BRANDING STRATEGY
Placemaking/Branding Strategy

Placemaking strategies will support the repositioning of key properties, and will enhance the overall retail environment in Van Ness.

1. **Use pop-ups to activate vacant spaces** in the interim while a long-term tenant is secured.
2. **Build on success of new food options** that have opened in recent years.
3. **Develop retail clusters** to create density in retail offerings.
4. **Continue programming and events** along Connecticut Avenue.
5. **Enhance the street experience of Van Ness** through unified streetscaping, distinctive signage, and outdoor dining.
6. **Use street furniture and art to enhance identity** and differentiate among competitive retail nodes.
7. **Increase the visibility of Van Ness Main Street.**
Placemaking/Branding Strategy: Use Pop-ups to Activate Vacant Space
Pop-ups activate and show the potential for vacant retail spaces.

- For retailers, pop-ups provide an opportunity to test the market before committing to a long-term lease.

- Van Ness Main Street should continue its efforts to put in place pop-up stores to activate vacant spaces along the corridor and draw new types of retail to the neighborhood.
Placemaking/Branding Strategy: Build on Success of New Food Options

Leveraging the success of recent openings will strengthen retail attraction efforts for quality food and beverage operators that can establish an identity for food in the neighborhood.

- By building on the success of recently opened high-quality food and beverage tenants at the northern end of the corridor, such as Sfoglina, Bread Furst, Soapstone Market, and Thai Pad, Van Ness retail can begin to cultivate a distinct identity.

- Though these new establishments are geared toward the residential population, they also appeal to other consumer groups in the neighborhood.

- New food and beverage tenants with a higher-end brand may draw consumers from outside the neighborhood to Van Ness.
**Placemaking/Branding Strategy: Develop Retail Clusters**

Retail clusters create a density of storefronts that will foster an engaging pedestrian experience along Connecticut Avenue.

- Developing clusters of retail storefronts along Connecticut Avenue by repositioning vacancies into multiple spaces will **create a stronger sense of retail continuity and a true corridor experience**.

- Current physical design and building uses in some locations along Connecticut Avenue **segment the corridor and create discontinuity of retail or active uses**.

- Having a number of retailers in proximity to one another will **mitigate impacts of seasonality** and decreased student presence.
Placemaking/Branding Strategy: Continue Programming and Events

Successful programming and events build identity and activate streets.

• Van Ness Main Street oversees programming and events along Connecticut Avenue, including the Van Ness Farmer’s Market and Social Club, which activate the corridor.

• Van Ness Main Street should continue programming and events in the neighborhood, with potential future events including international-themed events coordinated with local embassies, outdoor movie nights, and art exhibits.
Placemaking/Branding Strategy: Enhance the Street Experience of Van Ness

Retail tenanting will directly benefit from an enhanced street experience.

- In combination with strategic tenanting, creating an appealing street experience will **foster an inviting place for consumers to gather and spend time**.

- Increasing the “dwell time” of consumers in commercial areas directly translates to **increased spending**.

- Improving the street experience will require enhancements including **physical building design improvements, streetscaping, landscaping, public art, and outdoor seating**.

- Van Ness Main Street should also explore the potential of **providing free public wi-fi** as an amenity that encourages people to spend time in Van Ness.

*Source: DC Office of Planning*
Placemaking/Branding Strategy: Use Signage and Art to Enhance Identity

Signage is a quick and cost efficient way to build identity and promote the neighborhood.

- Adding signage and/or art between Albermarle and Tilden Streets is a notable way to **differentiate the corridor from other neighborhood retail nodes** along Connecticut Avenue.

- Art should be iconic and **tailored to social media to increase visibility** of the neighborhood and generate interest.

- Branding, through varied but controlled store signage, can help **build a stronger identity to resonate with existing or potential consumers**.
Placemaking/Branding Strategy: Increase Visibility of Van Ness Main Street

By positioning itself to be a resource for property owners, retailer brokers, and tenants, Van Ness Main Street will enhance retail attraction efforts.

As a neighborhood-wide organization focused on enhancing Connecticut Avenue, Van Ness Main Street should continually and regularly:

- **Communicate with retail brokers** through coordinated listings and regular meetings such as retail broker breakfasts.
- **Work with property owners** to support their needs.
- **Check-in with retailers** to get an on-the-ground perspective of retail conditions.
### Action Items

Short- and long-term action items should be employed to realize placemaking strategies and improve tenant attraction.

<table>
<thead>
<tr>
<th>PLACEMAKING/BRANDING STRATEGY</th>
<th>SHORT-TERM ACTION ITEM</th>
<th>LONG-TERM ACTION ITEM</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Use pop-ups to activate vacant spaces</td>
<td><strong>Identify retailers interested in opening pop-ups or testing Van Ness’ market</strong>, particularly for retail types recommended. <strong>Coordinate with property owners of vacant spaces</strong> to allow activation through pop-ups or other interim uses, potentially through third party operators such as appear[here] or Storefront.</td>
<td>Continue to use pop-ups to <strong>activate vacant retail storefronts</strong>.</td>
</tr>
<tr>
<td>2. Build on the success of new food options</td>
<td>In marketing materials for the neighborhood, <strong>highlight successes of new retail</strong>, such as Sfoglina’s rating as a Michelin Bib Gourmand restaurant, and include quotes from each of them.</td>
<td><strong>Position tenanting of future vacancies</strong> in 4340 Connecticut to capitalize on the success of recent openings and develop a critical mass of high-quality offerings.</td>
</tr>
</tbody>
</table>
**Action Items**

Short- and long-term action items should be employed to realize placemaking strategies and improve tenant attraction.

<table>
<thead>
<tr>
<th>PLACEMAKING/BRANDING STRATEGY</th>
<th>SHORT-TERM ACTION ITEM</th>
<th>LONG-TERM ACTION ITEM</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Develop retail clusters</td>
<td>Talk to area landlords about their retail strategy so <strong>targeted tenants can fill</strong> any upcoming vacancies.</td>
<td>Reposition 4250 Connecticut and 4340 Connecticut with <strong>multiple storefronts that establish variety and reinforce a human-scale pedestrian experience.</strong></td>
</tr>
<tr>
<td>4. Continue programming and events</td>
<td>Develop <strong>programming unique to Van Ness</strong> by building relationships with local stakeholders such as embassies in the neighborhood, or WAMU, whose offices are in Van Ness. Explore opportunities for street closures to <strong>host a major neighborhood street fair.</strong> Through outreach with residents, workers, and students, <strong>determine the types of events or programs in which they are interested and create an implementation plan.</strong></td>
<td>Continue programming and events so that Van Ness is always “<strong>top of mind</strong>” with consumers.</td>
</tr>
</tbody>
</table>
Action Items

Short- and long-term action items should be employed to realize placemaking strategies and improve tenant attraction.

<table>
<thead>
<tr>
<th>PLACEMAKING/BRANDING STRATEGY</th>
<th>SHORT-TERM ACTION ITEM</th>
<th>LONG-TERM ACTION ITEM</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Enhance the street experience of Van Ness</td>
<td>Develop a near-term action plan to move initiatives forward such as outdoor public seating, café seating at restaurants, landscaping, and public art.</td>
<td>Work with the City and coordinate with property owners to implement physical design enhancements as laid out in the Office of Planning’s Commercial District Action Strategy.</td>
</tr>
<tr>
<td>6. Use signage and art to enhance identity</td>
<td>Create signs or markers to place along Connecticut Avenue on street lights or in a similarly visible location. Consider store signage and graphic identity programs. Explore the potential to apply for funding from the DC Commission on the Arts and Humanities for art installations or programming.</td>
<td>Assess the potential to paint a mural or add other public art to become an identifying neighborhood marker. Sponsor a contest to select the artist, which will increase public awareness.</td>
</tr>
</tbody>
</table>
## Action Items

Short- and long-term action items should be employed to realize placemaking strategies and improve tenant attraction.

<table>
<thead>
<tr>
<th>PLACEMAKING/BRANDING STRATEGY</th>
<th>SHORT-TERM ACTION ITEM</th>
<th>LONG-TERM ACTION ITEM</th>
</tr>
</thead>
<tbody>
<tr>
<td>7. Increase visibility of Van Ness Main Street</td>
<td>Conduct <strong>regular outreach, both formal and informal</strong>, with property owners, tenants, and retail brokers to understand concerns and challenges, and serve as a central source of retail knowledge for the neighborhood. <strong>Property owners should engage retail brokers to fill vacant space as it becomes available,</strong> as they have relationships and market knowledge to improve attraction of quality tenants.</td>
<td>Continue <strong>outreach to owners, tenants and brokers</strong>. <strong>Consider presentations for CREW DC, coordination with WDCEP’s retail attraction efforts, involvement in local ICSC events, and participation in other real estate groups.</strong></td>
</tr>
</tbody>
</table>
# Appendix A: Retail Inventory

<table>
<thead>
<tr>
<th>Retail Tenant Name</th>
<th>Address</th>
<th>Category</th>
<th>Store Type</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank of America</td>
<td>4201 Connecticut</td>
<td>Services</td>
<td>Bank</td>
<td>2,000</td>
</tr>
<tr>
<td>Pho 14</td>
<td>4201 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>Casual Dining</td>
<td>1,000</td>
</tr>
<tr>
<td>Van Ness Wines and Liquors</td>
<td>4201 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>Liquor Store</td>
<td>1,000</td>
</tr>
<tr>
<td>Embassy Cleaners</td>
<td>4215 Connecticut</td>
<td>Services</td>
<td>Misc.</td>
<td>1,471</td>
</tr>
<tr>
<td>Reva Nails</td>
<td>4215 Connecticut</td>
<td>Services</td>
<td>Salon / Spa</td>
<td>1,471</td>
</tr>
<tr>
<td>Sushi Park</td>
<td>4221 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>Casual Dining</td>
<td>2,638</td>
</tr>
<tr>
<td>[Vacant]</td>
<td>4221 Connecticut</td>
<td>Vacant</td>
<td>Vacant</td>
<td>1,500</td>
</tr>
<tr>
<td>Laliquraz</td>
<td>4221 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>Casual Dining</td>
<td>2,613</td>
</tr>
<tr>
<td>[Vacant]</td>
<td>4225 Connecticut</td>
<td>Vacant</td>
<td>Vacant</td>
<td>15,000</td>
</tr>
<tr>
<td>Starbuck</td>
<td>4250 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>Coffee / Drinks</td>
<td>1,000</td>
</tr>
<tr>
<td>Eva Reality, LLC</td>
<td>4250 Connecticut</td>
<td>Services</td>
<td>Misc.</td>
<td>5,863</td>
</tr>
<tr>
<td>[Vacant]</td>
<td>4250 Connecticut</td>
<td>Vacant</td>
<td>Vacant</td>
<td>1,189</td>
</tr>
<tr>
<td>Pothos Sandwich Shop</td>
<td>4300 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>Fast Food</td>
<td>2,000</td>
</tr>
<tr>
<td>Total</td>
<td>4302 Connecticut</td>
<td>Services</td>
<td>Misc.</td>
<td>25,000</td>
</tr>
<tr>
<td>Ernesto's Hair Styling</td>
<td>4301 Connecticut</td>
<td>Services</td>
<td>Hair &amp; Beauty</td>
<td>300</td>
</tr>
<tr>
<td>CVS</td>
<td>4309 Connecticut</td>
<td>Services</td>
<td>Health &amp; Personal</td>
<td>9,200</td>
</tr>
<tr>
<td>[Vacant]</td>
<td>4304 Connecticut</td>
<td>Vacant</td>
<td>Vacant</td>
<td>2,000</td>
</tr>
<tr>
<td>Gold's Gym</td>
<td>4310 Connecticut</td>
<td>Services</td>
<td>Fitness</td>
<td>5,000</td>
</tr>
<tr>
<td>Calver Woodley Fine Wines &amp; Spirits</td>
<td>4339 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>Liquor Store</td>
<td>2,138</td>
</tr>
<tr>
<td>Acaia Bistro &amp; Wine Bar</td>
<td>4340 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>Casual Dining</td>
<td>2,018</td>
</tr>
<tr>
<td>Cleveland Park Library (Temp)</td>
<td>4340 Connecticut</td>
<td>Services</td>
<td>Misc.</td>
<td>2,018</td>
</tr>
<tr>
<td>UDC National Alumni Office</td>
<td>4340 Connecticut</td>
<td>Other</td>
<td>Misc.</td>
<td>2,018</td>
</tr>
<tr>
<td>Van Ness Main Street Office</td>
<td>4340 Connecticut</td>
<td>Other</td>
<td>Misc.</td>
<td>2,018</td>
</tr>
<tr>
<td>Tesoro</td>
<td>4400 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>Casual Dining</td>
<td>500</td>
</tr>
<tr>
<td>Avis Car Rental</td>
<td>4400 Connecticut</td>
<td>Services</td>
<td>Misc.</td>
<td>1,233</td>
</tr>
<tr>
<td>Subway</td>
<td>4401 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>Fast Food</td>
<td>1,100</td>
</tr>
<tr>
<td>The UPS Store</td>
<td>4401 Connecticut</td>
<td>Services</td>
<td>Misc.</td>
<td>1,200</td>
</tr>
<tr>
<td>ZIPS Dry Cleaners</td>
<td>4418 Connecticut</td>
<td>Services</td>
<td>Misc.</td>
<td>3,996</td>
</tr>
<tr>
<td>Burger King</td>
<td>4422 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>Fast Food</td>
<td>1,973</td>
</tr>
<tr>
<td>Flagship Car Wash Center</td>
<td>4432 Connecticut</td>
<td>Services</td>
<td>Misc.</td>
<td>2,040</td>
</tr>
<tr>
<td>Bread Pan</td>
<td>4434 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>Specialty Food</td>
<td>3,800</td>
</tr>
<tr>
<td>Sfoglini</td>
<td>4443 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>High-End Dining</td>
<td>2,790</td>
</tr>
<tr>
<td>Soapstone Market</td>
<td>4465 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>Specialty Food</td>
<td>6,057</td>
</tr>
<tr>
<td>Thai Pad</td>
<td>4481 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>Casual Dining</td>
<td>1,213</td>
</tr>
<tr>
<td>Cut N Edge Family Barbershop</td>
<td>4481 Connecticut</td>
<td>Services</td>
<td>Misc.</td>
<td>500</td>
</tr>
<tr>
<td>Diplomat Cleaners</td>
<td>4483 Connecticut</td>
<td>Services</td>
<td>Misc.</td>
<td>500</td>
</tr>
<tr>
<td>Italian Pizza Kitchen</td>
<td>4483 Connecticut</td>
<td>Food &amp; Beverage</td>
<td>Casual Dining</td>
<td>500</td>
</tr>
<tr>
<td>Nail Avenue</td>
<td>4483 Connecticut</td>
<td>Services</td>
<td>Misc.</td>
<td>500</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>129,553</strong></td>
</tr>
</tbody>
</table>
# Appendix B: Retail Demand Analysis Information

Secondary trade area spending potential by retail category.

<table>
<thead>
<tr>
<th>Retail Category</th>
<th>Existing Spending Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-Service Restaurants</td>
<td>$32M</td>
</tr>
<tr>
<td>Clothing Stores</td>
<td>$201M</td>
</tr>
<tr>
<td>Sporting, Hobby, Book &amp; Music Stores</td>
<td>$15M</td>
</tr>
<tr>
<td>Building Materials Stores</td>
<td>$124M</td>
</tr>
<tr>
<td>Electronics &amp; Appliance Stores</td>
<td>$24M</td>
</tr>
<tr>
<td>Furniture &amp; Home Furnishings Stores</td>
<td>$104M</td>
</tr>
<tr>
<td>Special Food Services</td>
<td>$1M</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$501M</strong></td>
</tr>
</tbody>
</table>

Note: Spending Potential for Secondary Trade Area includes only, as demand for convenience goods is assumed to be captured elsewhere.
Appendix C: Retail Demand Analysis Information

Alternative scenario: Retail spending potential generated from full occupancy of office building at 4000 Connecticut Avenue.

<table>
<thead>
<tr>
<th>Convenience Goods</th>
<th>Increase in Spending Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grocery Stores</td>
<td>+$3M</td>
</tr>
<tr>
<td>Specialty Food Stores</td>
<td>+$0M</td>
</tr>
<tr>
<td>Beer, Wine &amp; Liquor Stores</td>
<td>+$0M</td>
</tr>
<tr>
<td>General Merchandise Stores</td>
<td>+$0M</td>
</tr>
<tr>
<td>Limited-Service Restaurants</td>
<td>+$2M</td>
</tr>
<tr>
<td>Drinking Places—Alcoholic Beverages</td>
<td>+$1M</td>
</tr>
<tr>
<td>Health &amp; Personal Care Stores</td>
<td>+$3M</td>
</tr>
<tr>
<td>Miscellaneous Store Retailers</td>
<td>+$1M</td>
</tr>
<tr>
<td><strong>SUBTOTAL</strong></td>
<td><strong>+$10M</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Comparison Goods</th>
<th>Increase in Spending Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-Service Restaurants</td>
<td>+$2M</td>
</tr>
<tr>
<td>Clothing Stores</td>
<td>+$2M</td>
</tr>
<tr>
<td>Sporting, Hobby, Book &amp; Music Stores</td>
<td>+$1M</td>
</tr>
<tr>
<td>Building Materials Stores</td>
<td>+$0M</td>
</tr>
<tr>
<td>Electronics &amp; Appliance Stores</td>
<td>+$0M</td>
</tr>
<tr>
<td>Furniture &amp; Home Furnishings Stores</td>
<td>+$0M</td>
</tr>
<tr>
<td>Special Food Services</td>
<td>+$0M</td>
</tr>
<tr>
<td><strong>SUBTOTAL</strong></td>
<td><strong>+$5M</strong></td>
</tr>
</tbody>
</table>

**TOTAL INCREASE IN SPENDING POTENTIAL:** +$15M
Appendix C: Retail Demand Analysis Information

Alternative scenario: Retail spending potential generated from full occupancy of office space at 4250 Connecticut Avenue.

### Convenience Goods

<table>
<thead>
<tr>
<th>Convenience Goods</th>
<th>Retail Spending Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grocery Stores</td>
<td>$1,026,000</td>
</tr>
<tr>
<td>Electronics &amp; Appliance Stores</td>
<td>$97,000</td>
</tr>
<tr>
<td>Clothing &amp; Clothing Accessories Stores</td>
<td>$523,000</td>
</tr>
<tr>
<td>Sporting Goods, Hobby, Book &amp; Music Stores</td>
<td>$405,000</td>
</tr>
<tr>
<td>Full-Service Restaurants</td>
<td>$788,000</td>
</tr>
<tr>
<td>Limited-Service Restaurants</td>
<td>$671,000</td>
</tr>
<tr>
<td>Drinking Places—Alcoholic Beverages</td>
<td>$270,000</td>
</tr>
<tr>
<td>Health &amp; Personal Care Stores</td>
<td>$915,000</td>
</tr>
<tr>
<td>Miscellaneous Store Retailers</td>
<td>$227,000</td>
</tr>
</tbody>
</table>

**TOTAL SPENDING POTENTIAL** $4.9M

Note: While 4250 Connecticut is currently occupied and HR&A's retail gap analysis includes the retail spending potential of existing employees, this table is intended to isolate the retail spending potential generated by office workers in this property. Total retail spending potential is based on an estimated 740 office workers in the building, which assumes 250 square feet per employee for the approximately 185,000 square feet of office space. Total spending potential is presented without capture rates. Capturable spending potential by full occupancy at 4250 Connecticut is dependent on the tenant mix and quality of retail offerings in the neighborhood and retail competition in nearby areas.