Bladensburg Main Street Retail Market Analysis

Prepared For:
Bladensburg Road Main Street
DC Department of Small and Local Business Development

Prepared By:
Jon Stover & Associates
May 2020
Study Participants

Bladensburg Road Main Street
Bladensburg Road Main Street is dedicated to supporting, developing, and growing small businesses on Bladensburg Road NE from Mt. Olivet Road to Eastern Avenue.

Dept. of Small and Local Business Development
The DC Department of Small and Local Business Development (DSLBD) supports the development, economic growth, and retention of District-based businesses, and promotes economic development throughout the District’s commercial corridors. DSLBD manages the DC Main Street program and provides resources to local programs. DSLBD funded and oversaw this market analysis.

Jon Stover & Associates
Jon Stover & Associates (JS&A) specializes in retail revitalization, economic analysis, and helping public, private, and nonprofit organizations collaborate to meet economic development objectives. JS&A has helped a wide range of clients implement plans and programs that have successfully enhanced urban neighborhoods and commercial corridors.

Defining Retail
For the purposes of this study, retail is defined in three categories that are common in the retail landscape and used by DC’s Office of Planning.

Neighborhood Goods & Services
Establishments serving residents and workers such as dry cleaners, fresh produce stands, pharmacies, florists, nail salons, barber shops, convenience stores, and more.

Food & Beverage
Restaurants, cafes, bars, fast-casual dining, take-out establishments, coffee shops, and more.

Merchandise
Businesses selling general merchandise, accessories, furniture, apparel, electronics, and more.

Bladensburg Road is a central thoroughfare through Northeast DC, connecting the H Street corridor to Prince George’s County, Maryland.

About This Analysis
Bladensburg Road Main Street was formed in late 2019 and is in the process of establishing awareness, understanding its constituency, developing organizational objectives and programs, and building lasting relationships with a variety of stakeholders.

This report summarizes retail market analysis findings for the Bladensburg Road neighborhood. The purpose of this study is to help Bladensburg Road Main Street understand its neighborhood retail environment within a city-wide context; identify collective preliminary needs, constraints, and concerns of the business constituency; and identify opportunities for the Main Street to capitalize on retail conditions, trends, and projections to play a leading role in helping to serve local businesses.

This analysis relies on data provided by Bladensburg Road Main Street, the Washington DC Economic Partnership, ESRI, CoStar, WalkScore.com, a large variety of local planning and visioning documents, local real estate blogs such as CurbedDC and UrbanTurf, in-person site visits, and conversations with local business owners and staff. Retail economic and evaluation criteria correspond with the DC Office of Planning Vibrant Retail Streets Tool Kit. All findings presented in this report reflect the conditions at the time of the analysis.
Bladensburg Road Demographics

Bladensburg Road Population
6,324 residents live within a ¼-mile radius.
20,800 residents live within a ½-mile radius.
56,033 residents live within a 1-mile radius.

Median Household Income
Household incomes in Bladensburg Road are 26% lower than the city-wide median of $78,000.

Median Age
Bladensburg Road has an older median age than the District’s median age of 36.

Median Household Income
$57,996

Education Attainment
39% of residents have a Bachelor’s Degree.
19% of residents have a Graduate Degree.

Household Summary
45% 1-Person Households
7% 2+ Person Households
48% Households with Children

Population Growth Rate
(Since 2010)
6,324 residents live within a ¼-mile radius.
20,800 residents live within a ½-mile radius.
56,033 residents live within a 1-mile radius.

Over the past decade, neighborhoods around Bladensburg Road have grown at a slower rate than the District as a whole, reflecting the minimal number of new residential developments built on or around the street.

The Bladensburg Road Main Street program area is one of the few remaining clusters of industrial and flex land uses in the District. As a major thoroughfare through Northeast DC, the corridor features commercial uses that are predominantly automotive-oriented, with most businesses occupying standalone buildings with adjacent surface parking.

Annual Average Daily Traffic: 27,800 Vehicles on Bladensburg Road
70,493 Vehicles on New York Ave

Bladensburg Road and nearby New York Ave are major commuting routes for drivers traveling between downtown DC, upper NW DC, and across the Maryland border. As a result, Bladensburg Road businesses benefit from substantial visibility and capture spending from commuters and other customers from across the region, particularly Prince George’s County.

Data Sources: DDOT (2017), ESRI

Note: Data reflects demographics of one mile around Bladensburg Road Main Street market area.
Data Sources: ESRI Demographic Analyst

The area around Bladensburg Road has a notably high number of families, with nearly half of all households having at least one child.

Adjacent side streets also feature a significant inventory of industrial, warehousing uses (see p. 8-9), as well as single-family homes and low-rise apartment complexes. The surrounding area is a family-friendly, working-class area, with a high proportion of households with children and median household income below the District median. The area has seen limited new residential development over the past decade, resulting in a slower population growth rate than the rest of the District.
Bladensburg Road’s business mix reflects its strong regional accessibility, with several beverage and merchandise distributors, taxicab hubs, quick-service dining establishments, and auto repair shops.

The area’s supply of large, open commercial spaces has attracted a concentration of high-quality, storage businesses, churches, and small-scale manufacturers.

Notably, Bladensburg Road features a mix of direct-to-consumer and business-to-business enterprises, creating a wide range of operational challenges and spatial priorities. Direct-to-consumer businesses typically need higher-quality aesthetics and well-maintained storefronts, whereas business-to-business enterprises typically prioritize low rents and vehicular access when selecting locations.

Retail Real Estate Conditions

Bladensburg Road features below-average rents and relatively large retail spaces. These conditions, along with the corridor’s strong vehicular accessibility, make the corridor ideal for businesses looking to cut rental costs, expand operations, or gain access to a more regional set of customers.

These conditions create a stark contrast between Bladensburg Road and other Main Street commercial corridors in DC, which typically feature smaller retail spaces with traditional storefronts, higher rents, more limited parking availability, and more businesses that rely on consistent walk-in customer traffic.

Most retail space along Bladensburg Road is currently leased, continuing a significant downward trend in the corridor’s vacancy rate over the past decade. This rising demand for space indicates healthy overall retail performance.

Direct-to-consumer businesses typically need higher quality aesthetics and well-maintained storefronts, whereas business-to-business enterprises typically prioritize low rents and vehicular access when selecting locations.

Office space within the program area is relatively affordable, with an average rent 43% lower than the District average ($53/sf).

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Bladensburg Road Industrial & Flex Market Conditions

Bladensburg Road features one of the few clusters of industrial space in the District, providing opportunities for small-scale manufacturers and other specialty businesses to remain in the city.

As demand for residential and office spaces increases in DC, the city has seen a decline in its supply of industrial and flex spaces (designed to accommodate office and light manufacturing, warehouse, distribution, and/or quasi-retail uses). Given this trend, the clusters of large commercial spaces along Bladensburg Road provide the street with increasingly uncommon assets. These structures—fitted with open floor plans, loading docks, and high ceilings—are ideal for both manufacturing businesses and other miscellaneous uses such as event spaces, catering venues, and nightclubs. As detailed in the DC Office of Planning’s Ward 5 Industrial Land Transformation Study, these spaces play a key role in local job creation and entrepreneurial development.

Most commercial properties along the Bladensburg Road Main Street program area are zoned for Production, Distribution, and Repair (PDR 1 and PDR 2), which permits moderate to medium density commercial uses, large on-site workforces, and heavy machinery. The zoning allows for a wide range of commercial and institutional uses, including office, food and beverage, education, lodging, health care, small-format retail, live/work residential uses, and service businesses.

Bladensburg Road’s unique abundance of flexible space and zoning has attracted numerous commercial and civic uses, including a school, several churches, nightclubs, an Eritrean cultural and civic center, and a kitchen incubator, among others. This range of uses illustrates Bladensburg Road’s distinct role in the local real estate market as a home to businesses with unique spatial and/or manufacturing needs.

As industrial and flex buildings make up the majority of commercial square footage within the program areas—making Bladensburg Road Main Street the most industrial Main Street in DC. The program’s 1.3 million square feet of industrial/flex space accounts for 18% of the total industrial/flex supply in Ward 5.

Industrial and flex tenants in the program area pay approximately $4,000 more than the average retail tenant while leasing over four times as much square footage, on average. Rents for industrial spaces are lower than the District average, making this a feasible area for a wide range of prospective tenants.

Local beverage manufacturers, including a brewery, cidery, and coffee roastery offer tours and tasting rooms to visitors. Similarly, a local nightclub uses its large space to host church services during the day. These businesses reflect a nationwide trend toward more experiential retail and a blending of different commercial uses in a single space. As the lines between manufacturing and retail continue to blur, Bladensburg Road’s flexible zoning makes the area well positioned to attract more businesses seeking to both create and sell products in a single commercial space, as well as businesses looking to use their commercial space for multiple purposes throughout different times of the day or week.

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Where are Bladensburg Road customers coming from?

Bladensburg Road is a highly regional commercial corridor, with customers originating from across DC, Prince George’s County, and southern Montgomery County.

**Primary Market Area** (DC, Prince George’s County, southern Montgomery County) Approximately 70% of customers live within an approximately ten-mile radius of the Bladensburg Road Main Street program area. This area includes the entirety of the District of Columbia and Prince George’s County, Maryland, as well as Bethesda, Chevy Chase, and Silver Spring in southern Montgomery County, Maryland. This market area is comprised of nearby office workers, nearby residents, commuters, and “destination visitors” who travel specifically to Bladensburg Road to visit specific businesses.

**Secondary Market Area** (DC Region) Approximately 5% of customers reside within the DC region, but outside a ten-mile radius of the program area. This market area includes northern Montgomery County, Fairfax County, Loudon County, Prince William County, and Charles County.

**Outside DC Region** 25% of customers are tourists or out-of-town visitors. Many of these visitors likely travel from Georgetown, located just south of Glover Park.

**Bladensburg Road Customer Base**

Most retail customers live outside the immediate area but are willing to travel over two miles to visit businesses along Bladensburg Road.

Bladensburg Road’s customer base is spread throughout the DC region, as 45% of retail customers travel over two miles specifically to visit a business along the corridor. This regional orientation is primarily due to the corridor’s strong access to Prince George’s County and other areas of DC, as well as strong parking availability. Businesses along Bladensburg Road also attract customers commuting to and from work and employees of nearby businesses. The corridor also features a notably high share of customers who live outside the DC region. This customer base is composed of guests of nearby hotels around the intersection of Bladensburg Road and New York Avenue NE, as well as drivers passing through the region or delivering goods to nearby businesses.

**Retail Customer Profile**

Demographics of all retail customers along Bladensburg Road

<table>
<thead>
<tr>
<th>Customer Age</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 25 years old</td>
<td>23%</td>
</tr>
<tr>
<td>25-34 years old</td>
<td>15%</td>
</tr>
<tr>
<td>35-44 years old</td>
<td>16%</td>
</tr>
<tr>
<td>45-54 years old</td>
<td>11%</td>
</tr>
<tr>
<td>55-64 years old</td>
<td>15%</td>
</tr>
<tr>
<td>&gt; 64 years old</td>
<td>20%</td>
</tr>
</tbody>
</table>

Bladensburg Road attracts a high proportion of customers under 25 years old, which primarily stems from the corridor’s multiple event venues and nightclubs.

**Median Household Income of Customer**

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $20,000</td>
<td>15%</td>
</tr>
<tr>
<td>$20,000 - $75,000</td>
<td>31%</td>
</tr>
<tr>
<td>$75,000 - $150,000</td>
<td>24%</td>
</tr>
<tr>
<td>Greater than $150,000</td>
<td>30%</td>
</tr>
</tbody>
</table>

The household incomes of Bladensburg Road customers follow a relatively typical distribution, with a mix of low, moderate, and high-income customers.

**Customer Base Estimates** based on business surveys and customer origin data. These figures are approximate and should be used to understand the overall composition of customers frequenting the establishments within the Main Street.

Source: CARTO, Esri, Business surveys
Bladensburg Road Retail in the Greater DC Context

Bladensburg Road is a unique commercial corridor within the District -- offering the type of activity that cannot typically afford to locate elsewhere in the District. From storage, nightclubs, bus parking, nonprofit uses, and light manufacturing, Bladensburg Road provides these types of users with an affordable, car-friendly location that still allows them to remain in the District.

Bladensburg Road has a high average daily traffic count, surpassing the emerging H Street NE corridor and Rhode Island Avenue NE. Its surrounding and residential populations are more modest relative to other more centrally located and densely populated commercial corridors. However, most businesses along Bladensburg Road take advantage of the corridor’s strong regional accessibility and available parking to attract visitors from other areas, minimizing the negative effects of a comparatively smaller local customer base.

Retail rents in Bladensburg Road are significantly lower than other major commercial clusters in Northwest DC.

Vacancy Rate
In Comparison Neighborhoods

Bladensburg Road has a high daily traffic count, particularly around the intersection of Bladensburg Road and New York Avenue, which sees an average of 70,493 vehicles per day.

The node’s daytime population is supplemented by nearby office and industrial uses, though it lags more densely populated retail cluster in the District.

Bladensburg Road’s adjacent residential neighborhoods, such as Langdon and Gateway provide the corridor with a modestly-sized local population.

Daily Traffic Count
In Comparison Neighborhoods

Bladensburg Road’s adjacent residential neighborhoods, such as Langdon and Gateway provide the corridor with a modestly-sized local population.

Population Within a ½-Mile Radius
In Comparison Neighborhoods

Bladensburg Road features a high proportion of quick-service food and beverage businesses, reflecting its position as a major commuting corridor. It also features a moderately-sized proportion of establishments that serve neighborhood day-to-day goods and services.

Business Mix Comparison
By Number of Establishments

Bladensburg Road features a high proportion of quick-service food and beverage businesses, reflecting its position as a major commuting corridor. It also features a moderately-sized proportion of establishments that serve neighborhood day-to-day goods and services.

Data Sources: DDOT, ESRI, CoStar, Google

Image Credit: DC Social Venues
Retail Viability of Bladensburg Road

Diagnostic Assessment

The following commercial, demographic, and economic conditions are typically necessary to support the following three retail categories: neighborhood goods and services; food and beverage; and general merchandise, apparel, furnishings, and other retail.

<table>
<thead>
<tr>
<th>Neighborhood Goods &amp; Services</th>
<th>Food &amp; Beverage</th>
<th>Merchandise Retailers</th>
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<tr>
<td>Population</td>
<td>6,324 residents within ¼ mile (minimum)</td>
<td>20,800 residents within ½ mile (minimum)</td>
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<td>Median HH Income</td>
<td>$54,357 per year for households within ¼ mile (minimum)</td>
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<td>Daytime Population</td>
<td>9,497 people within ¼ mile (minimum)</td>
<td>10,826 people within ½ mile (minimum)</td>
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<td>Educational Attainment</td>
<td>37% of pop. has bachelor’s degree or higher (1/4 mi.)</td>
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Measuring the Viability of Retail

The DC Office of Planning developed a process to evaluate retail conditions in the District called the DC Vibrant Retail Streets Toolkit. This analysis borrows from the Toolkit to evaluate the conditions retailers look for before moving to a location, such as retail viability, and assess how the area satisfies the criteria. The above data points follow the conditions that are typically necessary to support the following retailers: neighborhood goods and services, food and beverage establishments, and general merchandise, apparel, furnishings, and other retail.

Bladensburg Road lacks many key commercial assets, such as strong pedestrian traffic, high incomes of surrounding residents, or proximity to a Metro station, that typically attract traditional urban retailers. However, retail establishments that typically have larger store layouts, such as merchandise retailers, or auto-oriented layouts, such as quick-service dining and banks, will find the high vehicular traffic, accessible parking, and large commercial spaces along Bladensburg Road appealing.

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While a limited number of new developments are currently planned along Bladensburg Road, the proposed New City DC development could add a significant amount of new commercial activity around the intersection of New York Avenue and Bladensburg Road.

The proposed mixed-use development would generate a new local customer base for nearby businesses, attract more destination visitors, help connect Bladensburg Road to neighboring Ivy City, and potentially change the perception and brand of the neighborhood. If the new development is within the Main Street program area, the planned 375,000 SF of new retail spaces would significantly diversify and expand the program’s business mix.

The stretch of Bladensburg Road north of New York Avenue only has one new project currently planned or under construction. As a result, businesses will need to continue capturing the spending of nearby residents, commuters, and regional destination visitors.

Projected Developments Impacts on Bladensburg Road Program Area Over Next 5 years

The proposed New City DC project, which includes retail, hotel, and residential uses, accounts for nearly all projected population and employment changes within the program area over the next five years.

- **2,099** New Residents
- **374,835 SF** New Retail Space
- **234** New Hotel Rooms
- **873** New Retail and Hotel Employees

Planned & Proposed Developments in Bladensburg Road:

**Diane’s House**
- 42 residential units
- 42,000 SF of retail space

Plans call for a four-story 42-unit, affordable residential building to create homes for individuals at risk for homelessness. Assistance will be provided to assist residents with the transition to independent living. The DC Housing Authority will provide several project-based vouchers to low-income residents. Residents within the development will be close to grocery stores, employment opportunities, and public bus routes.

**New City DC**
- 1,357 residential units
- 374,835 SF of retail space

The 16-acre site will be redeveloped into a 1.6 million SF mixed-use development. Potential plans call for up to 374,835 SF of retail space, up to 1,357 residential units, a 234-room hotel, and 1,353 parking spaces in thirteen new buildings.

Building 1 will contain up to 415 new residential units and 138 parking spaces. Building 2 will contain up to 378 residential units and 167 parking spaces. Building 3 will contain up to 434 residential units and 195 parking spaces. Building 4 will contain the 234-room hotel and approximately 20,000 SF of retail. Eight additional retail buildings could ultimately provide as much as 339,449 SF of retail and other commercial functions. A future phase will introduce another 112,754 SF of retail.

Development Snapshot:

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- 42 residential units
- 42,000 SF of retail space

Plans call for a four-story 42-unit, affordable residential building to create homes for individuals at risk for homelessness. Assistance will be provided to assist residents with the transition to independent living. The DC Housing Authority will provide several project-based vouchers to low-income residents. Residents within the development will be close to grocery stores, employment opportunities, and public bus routes.
Competitive Advantages

Bladensburg Road offers a wide range of affordable retail, industrial, and flex spaces that are highly accessible to customers traveling from across the District and greater region.

<table>
<thead>
<tr>
<th>56,033</th>
<th>27,736</th>
<th>1.3 Million</th>
<th>93%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residents (One-Mile Radius)</td>
<td>Average Daily Traffic Count</td>
<td>Industrial &amp; Flex Space SF</td>
<td>Retail/Storefront Occupancy Rate</td>
</tr>
</tbody>
</table>

Strong Regional Accessibility & Parking Access

Bladensburg Road is a major commuting corridor that connects Prince George’s County to DC, while also offering proximity to the Baltimore-Washington Parkway, US-50 (New York Avenue), and H Street NE. On-site parking is also widely available around most commercial spaces, making it particularly easy for customers from across the region to visit the corridor.

Affordable Retail and Industrial Rents

Rent per square foot rates for retail and industrial spaces along Bladensburg Road are typically below the District averages, creating opportunities for businesses looking for larger spaces and/or lower fixed expenses.

Supply of Industrial and Flex Spaces & Large Parcel Sizes

Bladensburg Road features one of the largest clusters of industrial and flex space in the District. The spaces, which typically feature open floor plans, large parcel sizes, loading docks, and high ceilings, can accommodate a wide range of commercial uses, including manufacturing, distribution, office, retail, and other miscellaneous commercial, cultural, and civic uses.

Flexible Zoning for Wide Range of Commercial Activities

Most commercial spaces on Bladensburg Road is zoned for Production, Distribution, and Repair, which permits large on-site workforces and heavy machinery and allows for a wide range of uses, including food and beverage, education, lodging, health care, small-format retail, live/work residential uses and service businesses.

Regional Customer Attraction

Bladensburg Road businesses capture spending from a notably wide geography, stretching throughout DC, Prince George’s County, and southern Montgomery County—reflecting the corridor’s strong access, available parking, and wide range of commercial uses.

Implications for Main Street Programming and Operations

Bladensburg Road Main Street should embrace its unique mix of commercial uses and large supply of industrial and flex spaces while helping businesses capitalize on the corridor’s strong regional access by attracting more customers from across the region.

Retain and Attract Businesses By Preserving and Highlighting Flexible, Creative-Friendly Conditions

Bladensburg Road Main Street is a unique Main Street program, as it overlooks a program area where over 70% of commercial spaces are industrial or flex buildings, with relatively flexible zoning that allows for a wide range of commercial uses. As such, the Main Street can help retain existing businesses and attract businesses that may otherwise move outside DC by working to preserve these unique characteristics. An opportunity also exists to build a corridor brand around the corridor’s maker friendly conditions by highlighting the wide range of businesses and activities that take place in the area.

Establish Long-Term Vision for Bladensburg Road

With a diverse set of businesses and land uses, it is especially important for the Main Street to undertake a strategic planning and/or neighborhood visioning process that determines what exact constituents should be served by the program. The vision should establish if the Main Street should ultimately focus on traditional retail or expand its scope to assist other manufacturing and/or nonprofit users. This vision should also establish how the Main Street can coordinate with the DC Office of Planning, Department of General Services, and WMATA to help achieve goals established in the Ward 5 Industrial Land Transformation Study—which details the need for the preservation of industrial space and maker businesses in Ward 5.

Continue to Support Efforts to Add Retail or Experiential Features to Manufacturing Spaces

Several manufacturing and maker businesses within the program area already offer tours and/or spaces for customers to stay and purchase products on-site—providing businesses with additional streams of revenue and attracting more customers to Bladensburg Road. The Main Street should continue assisting businesses implement interior and exterior enhancements necessary to attract in-store visitors, as well as promote tours, events, and retail spaces in these businesses.

Leverage Regional Accessibility by Assisting Businesses with Digital Marketing and Online Purchasing

Bladensburg Road’s Primary Market Area is particularly large, as businesses attract customers from throughout DC, Prince George’s County, and southern Montgomery County. Given the lack of foot traffic along the corridor, the Main Street continue leveraging this regional customer base by helping bolster digital marketing efforts that target destination visitors in this Primary Market Area.

Prioritize Individualized Technical Assistance to Account for Dispersed Nature of Bladensburg Road

Given the particularly long and auto-oriented of its program area, the Main Street should adjust its technical assistance accordingly. For example, with businesses far apart from one another, traditional community events are likely not as applicable. Instead, businesses will likely benefit more from additional one-on-one technical assistance that allows them to better promote and organize their events.