Study Participants

Rhode Island Avenue Main Street is an accredited Main Street program that promotes urban revitalization and investment in Rhode Island Avenue’s commercial centers, to ensure economic stability for its businesses and a safe, beautiful dwelling for residents and visitors.

Jon Stover & Associates (JS&A) specializes in economic analysis, retail revitalization, 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.

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.

This analysis relies on data provided by Rhode Island Avenue 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. All findings presented in this report reflect the conditions at the time of the analysis.

About This Analysis

This report provides a retail market analysis for Rhode Island Avenue Main Street. The purpose of this study is to help Rhode Island Avenue Main Street understand the context of the program area, evaluate current and projected retail conditions along both corridors, and identify opportunities to help serve local businesses in the area.

This report includes an analysis of existing retail conditions in both areas and identifies future retail opportunities expected from demographic and development projections. It also includes a set of key implications that the Main Street should consider when crafting future strategies for enhancing the vibrancy and commercial stability of both areas.

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.

Local Retail Context

Rhode Island Avenue is the primary commercial corridor serving the central Ward 5 region of DC. The program area of the Main Street program runs through multiple neighborhoods, including Edgewood, Eckington, Brentwood, Brookland, and Woodridge, and includes businesses along 4th Street NE and within the Brentwood Shopping Center.

The only other major retail cluster within easy walking distance of the RIAMS program area is located around the Brookland Metro station, along 12th Street and Monroe Street NE. Outside of this Brookland retail cluster and Rhode Island Avenue, the surrounding area has a very limited supply of retail uses, as most nearby land is zoned for either residential or industrial usage.
Rhode Island Avenue is one of the longest commercial corridors and in DC, acting as a major thoroughfare between downtown DC, Northeast DC, and Prince George’s County. Its surrounding neighborhoods are predominantly residential and composed of single-family and low-rise apartment buildings.

$66,875
Median Household Income
Households living within a half-mile of the corridor earn approximately 19% less than the District average

39
Median Age
Nearby residents have a median age 4 years older than the citywide average, reflecting the more family-oriented nature of surrounding neighborhoods.

Population Growth Rate
(Since 2010)

<table>
<thead>
<tr>
<th></th>
<th>Total Program Area</th>
<th>West of Brentwood Rd.</th>
<th>East of Brentwood Rd.</th>
<th>DC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Growth Rate</td>
<td>35%</td>
<td>9%</td>
<td>17%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Surrounding Residential Population
27,267
Residents live within a ½ mile radius of the RIAMS program area.

Surrounding Daytime Population
25,998
Workers and residents populate the RIAMS program area during the day.

New residential development around the Rhode Island Avenue Metro station has helped the corridor’s surrounding population keep up with citywide growth. However, the population east of Brentwood Rd. NE has not substantially increased, limiting commercial growth.

23,978 – 38,677 Vehicles
Annual Average Daily Traffic
As a major thoroughfare, Rhode Island Avenue has a very high daily traffic count, providing visibility and convenience for businesses, particularly those that rely on frequent deliveries and easy access to other parts of the DC area. Daily traffic counts are higher along the western half of the RIAMS program area, reaching nearly 40,000 vehicles per day.

How do customers get to Rhode Island Avenue businesses?
The eastern portion of the RIAMS program area is more than a fifteen-minute walk from a Metro station, increasing the necessity to drive, bike, scooter, or take the bus to desired businesses.

Rhode Island Avenue NE encompasses several different retail clusters, across multiple neighborhoods. Retail conditions are similar in the western and eastern portions of the corridor—primarily consisting of smaller, older commercial buildings surrounded by residential neighborhoods. Conditions are notably different in the mid-section of the program area, within the Brentwood neighborhood, with retail located in newer mixed-use development and a large strip mall with big-box retail.

Edgewood and Eckington
This retail cluster, located west of the Metro station, is characterized by older 1-2 story buildings and the upcoming mixed-use developments along the 400 block of Rhode Island Avenue, which are expected to boost pedestrian conditions and nearby foot traffic.

Brentwood
Located directly east of the Rhode Island Avenue/Brentwood Metro station, retail in this cluster is predominantly located in Rhode Island Row, a mixed-use development built in 2011, and Brentwood Shopping Center, a strip mall that includes the only big-box retail in the program area.

Brookland, Woodridge, and Langdon
The eastern portion of Rhode Island Avenue NE is characterized by a mix of street-facing ground-floor storefronts and auto-oriented commercial buildings with surface parking. East of South Dakota Avenue, the corridor becomes predominantly residential.
Retail along Rhode Island Avenue NE is predominately characterized by a mix of small one-to-two story commercial buildings and standalone commercial buildings with surface parking. Retail conditions are relatively consistent throughout the corridor, with older, affordable retail spaces, high traffic volumes, and a customer mix primarily composed of nearby residents.

Retail conditions significantly vary in Brentwood, within Rhode Island Row and Brentwood Shopping Center. As a newer development, asking rents in Rhode Island Row, at approximately $40/SF (NNN), are notably higher than the rest of the corridor. Brentwood Shopping Center also significantly varies from the rest of the study area. As a large strip mall with a grocery store and other big-box retail, including a Home Depot, it attracts more customers who live outside the surrounding area.

$25 / SF
Average Retail Rent
The average asking triple-net rent for retail spaces along Rhode Island Avenue is 42% lower than the District average of $43.

18% Vacancy Rate
18% of retail spaces along Rhode Island Avenue are not occupied. However, only 7 of these spaces are currently available for lease.

Average Lease Rate (NNN)
Asking rents along Rhode Island Avenue, on average, have seen very limited fluctuation, particularly over the past five years. Unlike many other DC neighborhoods, where rising rents have resulted in significant business turnover, Rhode Island Avenue has remained a relatively affordable place to do business.

952,013 SF
Total Retail Square Footage in the RIAMS Program Area

81 Years
Average Age of Retail Spaces

106 Total Retail Businesses in RIAMS Program Area

Business Challenges
In a recent survey, business owners and managers identified the following as key challenges:

- Lack of pedestrian activity (day and night)
- Lack of nearby eating/drinking establishments to draw customer traffic
- Difficulty with advertising, marketing, and customer attraction
- Disruption caused by nearby construction along 4th Street NE, resulting in parking challenges, decreased storefront visibility, and utility complications

Asking rents are slightly higher in Edgewood than the rest of the corridor. This likely reflects the area’s proximity to Metro and the anticipated positive impact of nearby upcoming developments, Bryant Street and The Rialto.

Edgewood* $29
Rest of Program Area $23

*Defined as area within RIAMS program boundary located west of Rhode Island Avenue/Brentwood Station.

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Businesses along Rhode Island Avenue primarily draw customers from four distinct sources: nearby residents, commuters, employees from nearby businesses, and residents who live in other areas of the DC region. The study area attracts a particularly high proportion of customers who live outside the surrounding neighborhoods, given how accessible Rhode Island Avenue is from other parts of the region.

The majority of retail customers fall within one of the following categories:

- **Nearby Residents**: 54%
  - Residents who live in the neighborhoods surrounding Rhode Island Avenue, including Edgewood, Brookland, Brentwood, and Woodridge, make up over half of businesses’ customer bases. Convenience stores, liquor stores, and carry-outs heavily rely on consistent spending from this customer base.

- **Residents from Maryland and other DC Neighborhoods**: 34%
  - Located along a major thoroughfare connecting Maryland, Northeast DC, and downtown DC, businesses in the RIAMS program area are particularly accessible to customers who live outside the immediate area. As more niche retailers and entertainment amenities locate along Rhode Island Avenue, the share of outside visitors is expected to increase.

- **Commuters**: 8%
  - Nearly 24,000 vehicles travel along Rhode Island Avenue per day, allowing businesses to capture spending from commuters on their way to or from home. These commuters typically stop for convenience store goods, food, or auto services.

- **Employees from Nearby Businesses**: 4%
  - Rhode Island Avenue is home to several small offices and other community/non-profit uses. Employees from these businesses, organizations, and other retail establishments comprise approximately 4% of the area’s overall retail spending. This spending typically occurs at food and beverage establishments.

Data Sources: Business surveys
Retail along Rhode Island Avenue is increasingly made up of Food & Beverage and Neighborhood Goods & Services establishments. The area’s affordable rents and older commercial spaces are also attracting a growing number of flexible, creative uses.

Many creative and non-traditional businesses have found a home on or around Rhode Island Avenue in recent years.

With affordable rents, strong accessibility into central DC and surrounding suburban counties, and a supply of older commercial spaces, Rhode Island Avenue is well-positioned to continue attracting these types of flex businesses. These competitive advantages have also attracted a variety of other non-traditional commercial uses to the area, including a recording studio, coworking space, catering companies, medical labs, food business incubators, and art galleries.

Over 80% of all new businesses that have opened along the corridor since 2010 are either Neighborhood Goods & Services and Food & Beverage establishments. Over the past five years, this figure jumps even higher to 88% - illustrating a growing shift towards more service-oriented retail.

This shift mirrors a regional and national trend towards more service-oriented retail that is less affected by the rise of e-commerce than merchandise-based retail. Given this trend, and the high level of interest food and beverage have expressed in currently available retail spaces, the increasing share of eating and drinking establishments and neighborhood services (dry cleaning, salons, etc.) is expected to continue.

The area has recently attracted several small-scale manufacturing businesses, including food and beverage establishments that manufacture and sell their products in the same space, such as Zuke’s Coffee (pictured above).

Data Source: Surveys with local brokers, Google
Rhode Island Avenue NE is one of the most affordable major commercial corridors in the District, making it an attractive option for retailers who cannot afford to locate in more expensive neighborhoods. The corridor also features a higher daily traffic count than other major corridors. However, the corridor lacks the nearby population necessary to support its over one million square feet of retail space, resulting in a relatively high rate of vacancy.

Retail rents along Rhode Island Avenue are significantly lower than other major retail corridors in DC, including nearby 12th Street in Brookland.

Rhode Island Avenue has nearly one million square feet of retail space – significantly larger than many other major retail corridors.

The corridor’s large supply of retail space and relatively small nearby population results in a vacancy rate higher than comparable corridors.

Rhode Island Avenue is a major thoroughfare that connects Maryland to central DC, providing businesses along the street with strong visibility and regional access.

Rhode Island Avenue has a low daytime population, as it is largely surrounded by single-family residential use, with few nearby offices. This limits retail viability, as many businesses struggle to attract consistent daytime customer traffic.

**Business Mix Comparison**

Rhode Island Avenue’s business mix reflects the primarily local-serving orientation of the corridor. It has a high proportion of businesses that offer neighborhood goods and services, as well as many churches and non-profit uses. Compared with other major commercial corridors, it features a notably low rate of food and beverage businesses, reflecting a potential opportunity for additional eating and drinking establishments.

**Average Rent**

<table>
<thead>
<tr>
<th>Neighborhood</th>
<th>Average Rent (NNN)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rhode Island Ave</td>
<td>$25</td>
</tr>
<tr>
<td>Lower Georgia Ave.</td>
<td>$35</td>
</tr>
<tr>
<td>Brookland (12th St)</td>
<td>$35</td>
</tr>
<tr>
<td>Wisconsin Ave (Georgetown)</td>
<td>$43</td>
</tr>
<tr>
<td>DC Overall</td>
<td>$64</td>
</tr>
</tbody>
</table>

**Total Retail SF**

<table>
<thead>
<tr>
<th>Neighborhood</th>
<th>Total Retail SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rhode Island Ave</td>
<td>952,013</td>
</tr>
<tr>
<td>Brookland (12th St)</td>
<td>738,797</td>
</tr>
<tr>
<td>Lower Georgia Ave.</td>
<td>208,832</td>
</tr>
<tr>
<td>Wisconsin Ave (Georgetown)</td>
<td>178,536</td>
</tr>
<tr>
<td>DC Overall</td>
<td>3,097,837</td>
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</tbody>
</table>

**Vacancy Rate**

<table>
<thead>
<tr>
<th>Neighborhood</th>
<th>Vacancy Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>RH Ave</td>
<td>18%</td>
</tr>
<tr>
<td>Brookland (12th St)</td>
<td>2%</td>
</tr>
<tr>
<td>Lower Georgia Ave.</td>
<td>12%</td>
</tr>
<tr>
<td>Wisconsin Ave (Georgetown)</td>
<td>17%</td>
</tr>
<tr>
<td>DC Overall</td>
<td>17%</td>
</tr>
</tbody>
</table>

**Daily Traffic Count**

<table>
<thead>
<tr>
<th>Neighborhood</th>
<th>Daily Traffic</th>
</tr>
</thead>
<tbody>
<tr>
<td>RH Ave</td>
<td>23,978</td>
</tr>
<tr>
<td>Brookland (12th St)</td>
<td>8,173</td>
</tr>
<tr>
<td>Lower Georgia Ave.</td>
<td>19,728</td>
</tr>
<tr>
<td>Wisconsin Ave (Georgetown)</td>
<td>20,826</td>
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<tr>
<td>DC Overall</td>
<td>17,564</td>
</tr>
</tbody>
</table>

**Daytime Population**

<table>
<thead>
<tr>
<th>Neighborhood</th>
<th>Daytime Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>RH Ave</td>
<td>27,673</td>
</tr>
<tr>
<td>Brookland (12th St)</td>
<td>34,489</td>
</tr>
<tr>
<td>Lower Georgia Ave.</td>
<td>92,257</td>
</tr>
<tr>
<td>Wisconsin Ave (Georgetown)</td>
<td>69,134</td>
</tr>
<tr>
<td>DC Overall</td>
<td>86,652</td>
</tr>
</tbody>
</table>

Data Sources: DDOT, Colliers, Google
Major upcoming development projects are expected to boost pedestrian traffic and commercial activity, while adding potential anchor tenants to the area.

The Bryant Street project will include an Alamo Drafthouse Cinema and large health club, while RIA DC is expected to include a major grocery store. These businesses have the potential to attract a wide range of customers to their respective neighborhoods, expanding visibility to nearby businesses and boosting daytime and nighttime pedestrian activity. The RIA DC project, located between Brentwood Street and Montana Avenue NE, will help bridge the gap between retail around the Metro station and retail located further east along the corridor, encouraging more pedestrian traffic along the street.

Projected Changes to RIAMS Program Area

<table>
<thead>
<tr>
<th>5 Years</th>
<th>10 Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,616 New residents</td>
<td>5,525 New residents</td>
</tr>
<tr>
<td>46,836 SF Of new retail space</td>
<td>437,446 SF Of new retail space</td>
</tr>
<tr>
<td>104 New local employees</td>
<td>972 New local employees</td>
</tr>
</tbody>
</table>

Proposed Area Developments

- **RIA DC**
- **Bryant Street / 680 Rhode Island Avenue NE**
- **The Rials / 410 Rhode Island Avenue NE**
- **1801 Rhode Island Avenue NE**
- **Mills Place / 1236 Rhode Island Avenue NE**

Legend: Residential, Retail, Office, Institutional, Destination, Industrial

Data Sources: MRP, WDCEP, MidCity, UrbanTurf

Development Snapshot:

**RIA DC**

- 1,760 residential units
- 181,000 SF of commercial space
- 55,000 SF grocery store

Once completed, this 20-acre mixed use development project, located between Brentwood Street and Montana Avenue NE, will help bridge the existing commercial gap between the Rhode Island Avenue/Brentwood Metro and ground-floor retail further east on the corridor. This is expected to boost pedestrian activity and retail spending along the street. Construction of the project’s first phase, consisting of 331 residential units, is expected to begin in 2020. The buildout of the total site plan is expected to last up to ten years, following approval from the Zoning Commission.

Development Snapshot:

**Bryant Street (Phase One)**

- 487 residential units
- 40,390 SF of retail space
- On-site Alamo Drafthouse Cinema
- Status: Under Construction

The first phase of the planned Bryant Street redevelopment, located at the former site of the Rhode Island Avenue Shopping Center, consists of three mid-rise apartment buildings with ground-floor retail. Alamo Drafthouse Cinema has already signed a lease at the site and the developer is targeting a health/fitness club as an additional anchor tenant for the project’s first phase.

At full-built out, the site will feature over 1,650 residential units and 250,000 square feet of retail space, which is expected to include an on-site grocery store, sit-down restaurants, entertainment uses, and neighborhood-serving retail. The project also includes a public plaza and improvements to the adjacent Metropolitan Branch Trail.

Projected Changes to RIAMS Program Area

- **5 Years**
  - 1,616 New residents
  - 46,836 SF Of new retail space
  - 104 New local employees

- **10 Years**
  - 5,525 New residents
  - 437,446 SF Of new retail space
  - 972 New local employees
As new retail supply comes to the neighborhood and consumer preferences continue to change, landlords of older retail spaces may need to become increasingly flexible with how they lease their spaces. Furthermore, RIAMS’s involvement in placemaking, branding, and marketing will be more important than ever.

Over the next five years, the first phases of the Bryant Street and RIA DC projects (along with other smaller developments) are expected to add over 1,500 residents to the corridor and bring nearly 50,000 square feet of new retail space. Population growth will grow at a similar rate as total retail space in the area.

Projected Changes
5 Years

At full build-out, the RIA DC project may provide as much as 437,000 square feet of retail space, creating a denser retail cluster and retail draw than currently provided in the neighborhood. Population growth is not expected to keep up with this influx of new retail space, which would widen the gap between retail supply and local consumer demand.

Projected Changes
10 Years

Population growth is not expected to keep up with the influx of new retail space, which would widen the gap between retail supply and local consumer demand.

<table>
<thead>
<tr>
<th>5 Years</th>
<th>10 Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>Projected Increase (over next 5 years)</td>
</tr>
<tr>
<td>Population (Half Mile Radius)</td>
<td>17,639</td>
</tr>
<tr>
<td>Retail Space (SF)</td>
<td>912,068</td>
</tr>
</tbody>
</table>

Note: Current population and retail space figures reflect half-mile radius around RIA DC and Bryant Street project. Projected increases only reflect changes from planned development projects.

Data Sources: WDCEP, CoStar, Google Image Sources: MRP, MidCity

Target Business Types of Local Brokers

The following business types were identified by retail brokers familiar with Rhode Island Avenue as business types that are particularly suited for the area, given existing levels of competition and strong performance of such business types in recent years.

- Food and beverage
- Small batch production/manufacturing
- Fitness and wellness (gyms, yoga, etc.)
- Medical offices
- Beauty salons and barber shops
Competitive Advantages

<table>
<thead>
<tr>
<th></th>
<th>Average retail rent</th>
<th>Average daily traffic count</th>
<th>New residents over next 10 years</th>
<th>New retail space over next 10 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>$25 / SF</td>
<td>26,978</td>
<td>5,525</td>
<td>437,446 SF</td>
<td></td>
</tr>
</tbody>
</table>

Affordable Retail Rents
With average asking rents 42% lower than the citywide average, Rhode Island Avenue offers an affordable place for businesses that want to avoid higher commercial rents found in downtown or other increasingly expensive neighborhoods, while still being in a traditional urban environment within the District.

Strong Accessibility to Downtown DC and Maryland Suburbs
Rhode Island Avenue NE provides businesses easy access to Prince George’s County, downtown DC, and other neighborhoods. It is also highly accessible to one of the city’s largest clusters of industrial spaces, located just south of the corridor in the Gateway neighborhood, a key convenience for retailers with off-site production operations.

Large Supply of Older, Flexible Commercial Spaces
Retail spaces near and along Rhode Island Avenue are typically older spaces that, in conjunction with their relatively affordable rents, are well suited for tenants that use ground-floor retail spaces for creative and/or non-traditional uses. Current examples include catering, art galleries, medical labs, music production, coffee brewing, coworking, and nonprofit office space.

Location Along Major Commuting Corridor
Nearly 27,000 vehicles drive along Rhode Island Avenue NE each day, allowing nearby retailers to capture commuter spending. The western portion of the RIAMS also includes the Rhode Island Avenue/Brentwood Metro station.

Surge in Investment and Paced for Future Growth
Several major mixed-use projects are planned or under construction around the Rhode Island Avenue Metro station. These projects are expected to bring over 5,500 residents and 437,000 square feet of retail space upon full build-out, creating a more active, pedestrian-friendly atmosphere that will attract even larger customer traffic.

Embrace Rhode Island Avenue as a home for all business types – including untraditional commercial uses. In the Brookland, Langdon, and Woodridge areas of the corridor, RIAMS can help attract and support newly established retailers, establishments that need to relocate from more expensive areas of the city, and non-retail uses such as nonprofits, office, makers and coworking spaces, arts and community uses, and flex industrial uses.

Rhode Island Avenue is attracting a growing number of new independent businesses and non-traditional commercial uses, helping the corridor fill retail spaces and add daytime activity to the corridor. While many types of retail are viable along the corridor, non-traditional commercial tenants, such as nonprofit offices, churches, caters, recording studios, and art galleries are particularly well-suited for the corridor, given the area’s affordable rents, older flexible spaces, and strong regional accessibility. While these tenants may not fit the image of a traditional Main Street business, they represent the history of the corridor, help activate vacant spaces, attract more visitors to the area, and play an important role in making Rhode Island Avenue interesting and unique.

Play a proactive role in helping lease available spaces, by connecting prospective businesses with local real estate brokers, consistently communicating the corridor’s competitive advantages, and providing technical assistance to help businesses better market themselves to customers from across the city.

These actions are particularly needed along Rhode Island Avenue, as the area, with a modest nearby residential and commercial population and nearly one million square feet of retail space, lacks the local spending capacity to exclusively support its supply of retail space. In addition, the area is not a large destination draw, except for customers coming to the Brentwood Shopping Center. Businesses capture some commuter spending, but this spending is not enough to fully support the retail supply. This condition of more retail building space than customer demand for retail space is sometimes called being "over-retailed".

Help maximize the positive impacts of upcoming development by enhancing the aesthetics and brand identity of the corridor to attract more shoppers from outside the neighborhood.

Large upcoming mixed-use developments, Bryant Street and RIA DC, will enhance pedestrian conditions, add residential density, and add new commercial amenities to the corridor. However, even with new residential construction, the corridor is likely to remain “over-retailed”. Therefore, there is a major opportunity for the Main Street to play a leading role in marketing, branding, and placemaking efforts, helping to ensure new developments serve as commercial and community anchors. This may include helping promote available retail spaces in the area, organizing events in newly created public spaces, and assisting nearby businesses in making strategic adjustments to help attract new visitors.

Key Opportunities

Embrace Rhode Island Avenue as a home for all business types – including untraditional commercial uses. In the Brookland, Langdon, and Woodridge areas of the corridor, RIAMS can help attract and support newly established retailers, establishments that need to relocate from more expensive areas of the city, and non-retail uses such as nonprofits, office, makers and coworking spaces, arts and community uses, and flex industrial uses.

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