DOWNTOWNS DC CONTINUES TO BE THE ECONOMIC HUB OF THE WASHINGTON REGION OFFERING PREMIER OFFICE BUILDINGS, HOTELS, RESTAURANTS, DIVERSE CULTURAL DESTINATIONS, RETAIL OPTIONS FOR ALL, WORLD-CLASS SPORTS AND SO MUCH MORE!

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Cover page photo: Conrad Washington, DC
The Downtown Business Improvement District (BID) Corporation was founded in 1997 and is a private non-profit organization. This special district, where property owners have agreed to tax themselves to fund services, encompasses a 138-block area of properties from Massachusetts Avenue on the north to Constitution Avenue on the south, and from Louisiana Avenue on the east to 16th Street on the west.
Dear DowntownDC BID Member,

For nearly the past two decades, the Downtown Business Improvement District (BID) Corporation has brought you its annual State of Downtown report. This report provides a thorough review of various sectors that contribute to the character, success and vitality of DowntownDC, and the District of Columbia. This year, while we are proud to present to you the 2019 State of Downtown report, we are keenly aware of the current coronavirus (COVID-19) pandemic and the catastrophic impact it is having and will continue to have on every aspect of our lives.

While the impact of the COVID-19 health emergency continues to unfold, we hope the 2019 report will serve as: (1) a record of the 2019 performance of the downtown economy, its transportation network and its quality of life; and (2) a roadmap, as together we will begin planning business and economic relief efforts and the steps toward DowntownDC and the District’s economic recovery.

As we reflect on 2019, one of our most meaningful achievements occurred in February 2019, when the BID began operations of the Downtown Day Services Center (The Center) at the New York Avenue Presbyterian Church. The Center, built to serve people experiencing homelessness and funded by a $1.7 million grant from the Department of Human Services (DHS), is a single access point for an array of services, including working with individuals to move them into permanent, supportive housing. While The Center is currently shuttered, due to the city’s ongoing efforts to contain COVID-19, over the past year The Center served an average of 125 individuals daily from Monday through Friday 9:00 a.m. - 5:00 p.m. The support of our partners, the DC Department of Human Services, Pathways to Housing DC, Unity Healthcare, HIPS, other DC government agencies, volunteers and all those involved continue to guide us in our support of Mayor Bowser’s goal to end homelessness in the city.

Significant milestones were achieved as we continue our work with partners to renovate Franklin Park. In March 2019, the District and the U.S. National Park Service signed the cooperative management agreement allowing the District to use its funds to renovate the park. In September, the District, through the DC Department of Parks and Recreation and the DC Department of General Services, signed a memorandum of agreement with the BID for the operation and management of Franklin Park. Construction is expected to start in April 2020.

In 2019, DowntownDC provided a net fiscal impact of $869 million, enough to fund both the Metropolitan Police Department and DC Fire and Emergency Medical Services departments. The economic success of Downtown DC over the past two decades should provide the foundation for downtown’s recovery post the COVID-19 pandemic.

The BID will continue planning and working with all of its stakeholders for the hopefully speedy return of a vibrant downtown. During this time our maintenance teams continue to ensure DowntownDC remains clean and provide services for our homeless brothers and sisters who are deprived of it during the COVID-19 pandemic.

We look forward to working with you to return to the levels of economic activity and vibrancy depicted in the 2019 State of Downtown report.

Sincerely,

Neil Albert
President & CEO
DowntownDC BID

Chase Rynd
Chairman,
Board of Directors
DowntownDC BID

FROM THE PRESIDENT & CEO AND THE CHAIRMAN OF THE BOARD
While there were a few positive performance records set in 2019, it was a below average year for DowntownDC. In general, DowntownDC’s growth rates were below those of the rest of the city, the suburbs and the nation. However, investment and development interest continued to be strong, both in the private sector and with key investments by the District. And, while performance was flat or down, in most cases, DowntownDC’s office, hotel, convention, culture, entertainment and dining sectors continue to be national and global leaders.

Current development in DowntownDC remained strong with 10 projects completed in 2019, totaling $878 million, bringing the total development, since the completion of the Capital One Arena in December 1997, to $15.3 billion. This total represents 23% of DC’s total development. 2019’s completions represent 13% of DC’s development completion total.

The District has been a key investor in DowntownDC since the Capital One Arena was built investing $550 million in DowntownDC from 1995 through 2019 (3.6% of total development); $210 million of funding for the renovation and modernization of the Martin Luther King, Jr. Memorial Library; $178 million per year of pay-go capital for Metrorail, with DowntownDC property owners making a substantial contribution through a variety of tax increases; $18.5 million of funding for the reconstruction of Franklin Park; and $54 million for the K Street Transitway Project, of which 44% is in DowntownDC ($122 million total project cost).
DC’s Employment Growth Rate Has Trailed That of Northern Virginia for 9 of the Past 10 Years and That of Suburban Maryland for 3 of the Past 10 Years

Since 1997, 117 of the then 125 existing development sites have been developed and numerous buildings have been demolished and replaced by new construction or emptied of tenants and substantially rehabilitated. Demo/new and substantial renovation projects were 73% of 2019’s completed and currently-under-construction projects. There are near-term plans for ten new prominent projects totaling $900 million. DowntownDC’s Net Fiscal Impact was $869 million in 2019—more than the combined budgets of the DC Metropolitan Police Department and DC Fire and Emergency Medical Services Departments in fiscal year 2019. The 2019 net fiscal impact increased from $506 million in 2018, a nominal growth rate of 6.3% and a real growth rate of 4.4%. Most large city’s downtowns produce significant net fiscal impacts due to downtown’s greater building and employment density, greater transit connections, greater amenities and fewer resident services such as schools and social safety net services.

In 2019, DC Lost the Fewest Number of Office Tenants to Northern Virginia Since Data Collection Began in 2001

In both DowntownDC and DC, nominal and real tax revenues have grown faster than employment, population, office SF, hotel rooms or theatre seats. This is primarily due to the city’s progressive tax structure, a vibrant hospitality, entertainment and restaurant industry and increasing property values. DowntownDC’s Office Market took a turn south from its’ sideways performance of the past few years. The office vacancy rate rose from 13.4% to 15.5%—its highest level since CoStar began tracking the DowntownDC office market in 1993. DC’s vacancy rate of 12.9% was its sixth highest since 1993 and highest since 2010. DowntownDC’s vacant square footage (SF) totaled 8.8 million and the rest of DC vacant SF totaled 10.5 million. DC’s total office market size is 150 million SF.

Over the past few years, office deliveries have outpaced absorption by 4.8 million SF. The older vacant office space represents an opportunity for the conversion into housing with modest tax incentives and a positive fiscal impact under reasonable assumptions. Hotels, Tourism and Convention Center sector of DowntownDC’s economy was a bright spot for 2019 and has been for many of the past several years. The opening of the 370-room Conrad Washington, D.C. hotel in March 2019 (see cover page of report) joined new hotel openings of the Eaton Hotel and the Moxy in 2018. The W Hotel completed its $50 million renovation in 2019 as well. The Walter E. Washington Convention Center continued to anchor the DowntownDC hospitality market with a 2019 attendance of 1 million and 14% of DowntownDC’s hotel room nights. There are announced plans for three more DowntownDC hotels totaling approximately 700 rooms—a 6% increase. DowntownDC has 35% of DC’s hotel rooms and generates 40% of DC’s hotel revenues (and hotel sales tax revenues).
The Culture & Entertainment sectors had strong years, but not as strong as 2018. Attendance in 2019 was 7.5 million. The Newseum’s closing on December 31, 2019 followed last year’s Spy Museum move to southwest DC. These two closures reduced DowntownDC’s annual culture and entertainment attendance by an estimated 1.4 million. In addition, the first-year crowds to see the portraits of former President Barack Obama and former First Lady Michelle Obama at the National Portrait Gallery declined in 2019, but still helped the museum to its second-best attendance year ever. Also, the Capital One Arena was closed for many weeks for phase two of its renovations and was closed for many weeks for repairs to their pre-June 2016 levels and the partial return of late-night hours employees and businesses: (1) a transportation infrastructure is highly ranked regionally and nationally, but has lost market share to other DC submarkets. Shopping and Dining in DowntownDC had a mixed year in 2019 with several restaurants and chefs receiving national recognition. Shopping reported several exciting openings including Apple’s Flagship store (including the DC History Center) at the Carnegie Library and Tiffany & Co. at CityCenterDC, but there also were five store closings, including Forever21 and the announced closing of Bed Bath & Beyond. Dining reported 10 restaurant openings and 14 restaurant closings, the second year in a row that DowntownDC had a net loss of four restaurants. See the Shopping and Dining section (page 36) for a full list of 2019 openings and closings.

DowntownDC Residential units did not increase in 2019, and their relative performance compared to the Rest of DC declined modestly. DowntownDC’s population grew by 7% in 2019 to 10,994 from 10,290 due to a decrease in vacant units, with Class A apartment vacancy declining to 4.9% from 5.7%. DowntownDC’s Class A apartment rents increased 4.4%, but other DC sub-markets reported greater annual rent increases. Condominium prices declined 6.7% to $617 per SF, while nearby DC submarkets saw increases of 0.4% to 2% and prices of $657 to $737.

DC’s population growth slowed considerably in 2019 to 0.60%, with negative domestic migration growing substantially in 2019. Northern Virginia and Suburban Maryland populations grew 0.65% and 0.36%, respectively. This compares to national population growth of 0.5% in 2019.

In 2019, for the first time in six years, Metrobus transported more people to DowntownDC than it had in the previous year. The dedicated bus lanes on H and I Streets were both piloted and made permanent. DowntownDC is also a leader in micromobility with five micromobility zones installed in DowntownDC in 2019 and many more planned for 2020. DowntownDC’s Quality of Life is driven by DC and the region’s market economy as outlined in this report, managed by government regulation and maintained and improved by private and government investment in both economic development and social development projects and programs. The Downtown Day Services Center opened in February 2019 and grew to serve up to 150 clients per day by the end of 2019. Each night approximately 75 people sleep on/in DowntownDC’s streets. Property crimes in DowntownDC totaled 2,016 in 2019 (5.8 per day), an increase of 27% over 2018 and 13% over the average of 2014 - 2018. Robberies and assaults totaled 147 in 2019 (0.4 per day), an increase of 28 crimes over 2018. There were no homicides in 2019.
CURRENT DEVELOPMENT

Though only two projects broke ground in 2019 totaling $65 million, there were six new exciting project announcements in 2019 and early 2020 totaling an approximate $1 billion.

CHANGING NATURE OF DEVELOPMENT IN DOWNTOWN

Much of the development in DowntownDC in recent years has involved existing buildings being demolished and replaced, renovated or repurposed. In 2019, 80% of the projects completed involved existing buildings. The percentages for projects under construction and planned that involve existing buildings are 89% and 59%, respectively—73% for all projects combined. With 526 buildings in DowntownDC and only eight remaining ground-up development sites, DowntownDC’s major future development will continue to mostly involve the demolition and replacement, renovation or repurposing of older buildings.

COMPLETED PROJECTS

There were 10 projects totaling $878 million completed in 2019. In order of investment size: 250 Massachusetts Avenue NW (new office), Conrad Washington, D.C. Hotel (new), Anthem Row at 700 and 800 K Street NW (renovated office and retail), 1101 Sixteenth Street (renovated office), W Hotel renovation (renovated hotel), 730 15th Street NW (renovated office), 1411 L Street NW (renovation), 909 E Street NW (renovated office) and the Apple Flagship Store and DC History Center at the Carnegie Library (renovated retail and museum).

PROJECTS UNDER CONSTRUCTION AT YEAR-END

There were nine projects totaling $543 million under construction at year-end 2019. In order of investment size: Martin Luther King Jr. Memorial Library (renovated library), 699 14th Street NW (new office and renovated retail), Riggs Washington, D.C. Hotel (renovated hotel), 1201 New York Avenue NW (renovated office), Milken Institute’s Center for Advancing the American Dream (repurposed into a museum), World War I Memorial, Planet Word (renovated museum), The Aleck at 1400 14th Street NW (renovated office and retail) and National Children’s Museum (repurposed into a museum).

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PLANNED PROJECTS

Only eight development sites remain from the 125 that existed in 1995. The three major ground-up sites are (1) buildings three, four and five at Capitol Crossing, (2) 901 New York Avenue’s office and retail building and (3) the parking lot adjacent to the Community for Creative Non-Violence (CCNV) at First and D Streets NW. In addition to those ground-up sites, there are many exciting redevelopment projects in the works (in order of announcement): (1) the reconstruction of Franklin Park, (2) Monument Realty’s office residential project in the 600 block of H and Eey Streets NW that will share underground parking, (3) Johns Hopkins University’s purchase and substantial renovation of the Newseum with a total investment of $578 million, (4) Georgetown University’s purchase and renovation of 550 First Street NW, (5) Pablosbrook Hotel Trust and Viceroy Hotels & Resorts $25 million renovation of Hotel Donovan into the Hotel Zena, (6) Quadrum’s 400-room Arlo Hotel that incorporates the historic Canterbury/Harrison apartment building at the northwest corner of Third and G Streets NW, (7) Acumen’s redevelopment of 509–517 H Street NW with a new high-rise structure being set back from these historic buildings into a 150 to 250 room hotel, (8) the redevelopment of Washington Metropolitan Area Transit Authority’s (WMATA) current headquarters building at Fith and F Streets NW by the team of Stonebridge and Rockefeller Group starting in 2023, (9) Lincoln Properties and Cadillac Fairview’s conversion of 1313 L Street NW into a 222-unit Class-A apartment building and (10) Jetset Hospitality’s conversion of 25 E Street NW into a hotel.

DOWNTOWNDC DEVELOPMENT

WAS STRONG IN 2019

Development in DowntownDC continued to be strong in 2019 with the completion of 10 projects totaling an investment of $878 million; nine projects under construction at the end of 2019 totaling an investment of $583 million and 22 planned projects over the next five to six years totaling $2.3 billion.

6 PROJECTS REPRESENTING $1 BILLION BROKE GROUND BETWEEN LATE 2019 AND EARLY 2020

DOWNTOWN DEVELOPMENT HISTORY

CUMULATIVE TOTALS (FROM JANUARY 1997)

Source: DowntownDC BID

PROJECTS COMPLETED BY YEAR

INVESTMENT

(billions of $)

# OF PROJECTS

2019

2018

2017

2016

2015

2014

2013

2012

2011

2010

2009

2008

2007

2006

2005

2004

2003

2002

2001

2000

1999

1998

1997

2009 10 11 12 13 14 15 16 17 18 2019

PROJECTS UNDER CONSTRUCTION AT YEAR-END

INVESTMENT

(billions of $)

# OF PROJECTS

2019

2018

2017

2016

2015

2014

2013

2012

2011

2010

2009

2008

2007

2006

2005

2004

2003

2002

2001

2000

1999

1998

1997

2009 10 11 12 13 14 15 16 17 18 2019

STATE OF DOWNTOWN 2019

DOWNTOWNDC.ORG
EMPLOYMENT

DOWNTOWNDC REMAINS THE REGION’S LARGEST EMPLOYMENT CENTER, BUT ITS SHARE IS DECLINING

DowntownDC hosts 188,600 jobs in just one square mile, making it the region’s largest job center with 5.6% of the region’s employment and 24% of the District’s employment. However, both market shares have been declining over the past few years as has the District’s share of regional jobs. In 2019, DowntownDC employment fell by 1,400, a decrease of 0.7%. However, DC jobs grew to 798,330 in 2019, an increase of 5,500 or 0.7%. DC’s job growth has lagged Northern Virginia’s for the last four years. However, when private sector job growth rates are compared, DowntownDC and DC compare more favorably with the suburbs. Employment growth in Suburban Maryland was 0.8% and in Northern Virginia 1.9%. Private-sector office-using jobs in DC grew by 4,600 to 296,700, or 1.6% and legal services jobs rose 1.8% to its highest level since 2014 — just above 29,000. DowntownDC is home to nine of the 10 largest law firms in the region and home to 40 of the 100 largest law firms in the region.

DOWNTOWNDC HOLDS 188,600 JOBS IN ONE SQUARE MILE

DOWNTOWNDC EMPLOYMENT HISTORY

REGIONAL EMPLOYMENT HISTORY

The Fannie Mae headquarters is located at 15th and L Streets NW at the site of the former Washington Post building.
FEDERAL JOBS DECLINE AND PRIVATE JOBS INCREASE MODESTLY

The federal government has been moving some federal workers out of DowntownDC and DC to take advantage of lower rents in other DC submarkets and the suburbs. This has been partially offset by private sector employment growth.

The Justice Department moved an additional 1,900 employees to NoMa adding to the 1,300 employees it moved in January 2018. Private employment in DowntownDC had a few sectors grow and a few contract — the net private sector job growth was 500. Private sector jobs decreased by almost 500, as a result of a net decrease in destination restaurants, a net decrease in shopping square feet and the closing of the Spy Museum. Private sector jobs increased by a little over 1,000, due to The Carlyle Group moving 350 employees from Rosslyn to DowntownDC, the opening of the Conrad Hotel and increased occupancy of co-working space.

Since 1991, the federal government’s share of DC jobs declined from 33.3% to 24.5%. In DowntownDC, the 59,700 federal government jobs make up 32% of total employment.

OFFICE EMPLOYMENT DEPARTURES TO THE SUBURBS REACH A RECORD LOW WITH HELP FROM AMAZON

Only an estimated 115 office workers left DC for Northern Virginia in 2019 — a record low since the BID began collecting data in 2001. This was offset by the move of an estimated 450 employees into DC from Northern Virginia. Thus, a net gain of 365 employees for the District. This was partially due to a substantial decrease in the vacancy rate in Arlington as a result of Amazon announcing its plans to open a second headquarters there in November 2018. Amazon’s stated employment goal is 25,000.

A GROWING HIGHER EDUCATION WORKFORCE

Johns Hopkins University and Georgetown Law School are expanding their operations in DowntownDC and will be growing the higher education employment base with hundreds of new employees.

TOTAL EMPLOYMENT®

Private Employment®

1991

2014-2019

Source: U.S. Bureau of Labor Statistics, Stephen S. Fuller Institute and DowntownDC BID

(a) Excludes Federal and DC government and transportation employees.
2019 was a difficult year for both the DowntownDC and DC office markets

For several years, the DowntownDC office market has experienced modest reductions in occupied office space and delivered a significant amount of new office space. This resulted in a rising vacancy rate and minimal effective rent growth. On the positive side, office sales prices were very strong, led by foreign demand. In 2019, the DowntownDC vacancy rate reached 15.5%, a record level and a significant increase from 13.4% at the end of 2018. Effective rents grew a meager 0.3%. The DC vacancy rate rose to 12.1% from 10.1% and effective rent growth was 0.8%. Office building sales prices dropped in 2019 in both DowntownDC and DC as foreign buyers decreased their purchases and sold several buildings. Because DowntownDC has some of the highest rents in the city and region, its landlords must work very hard to keep tenants in DowntownDC and DC. As a result, rent concessions for tenants are at an all-time high. For trophy or Class A leases, tenant improvement allowances reached $125 per SF and with free rent of 17 months. The impact of these concessions is an effective rent that is $10 per SF less than an asking rent.

Co-working office demand was robust in 2019

A bright spot for both DowntownDC and the Rest of DC was the significant leasing in 2019 by co-working firms of 773,000 SF, led by WeWork. For 2018 and 2019, co-working firms accounted for approximately 100% of the city net absorption. At the end of 2019, DC had 2.9 million SF of co-working space, approximately 1.9% of DC’s total inventory.

WeWork accounts for 43% of DC’s co-working space and, thus, 0.86% of the city’s total inventory. Co-Working is predicted by many analysts to continue to grow, but the slope of its grow curve is not clear. DowntownDC and DC are fortunate to have a diversity of co-working space operators.

DowntownDC has 35% of the city’s for-lease office space

### Regional Overall Office Average Asking and Effective Rents

<table>
<thead>
<tr>
<th>Year</th>
<th>Effective (price per SF)</th>
<th>Asking (price per SF)</th>
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<tbody>
<tr>
<td>2010</td>
<td>43.09</td>
<td>51.62</td>
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<tr>
<td>2019</td>
<td>51.83</td>
<td>51.92</td>
</tr>
</tbody>
</table>

Sources: Delta Associates and REIS

(a) Overall rents includes all classes of buildings.
(b) Delta and REIS East End submarket is considered to be DowntownDC.
DOWNTOWNDC AND DC OFFICE BUILDING SALES 

Prices declined in 2019 as foreign investors reduced office building purchases

DowntownDC office building sales averaged $540 per SF in 2019, a decrease from the average price for the previous four years of $704 per SF, or 23%. DC office sales averaged $494 per SF in 2019, a decrease from the average price for the previous four years of $537, or 8%. The average sales prices in Arlington and Bethesda were $414 and $411 per SF, respectively, and a decline from 2018 of 12% and 6%, respectively.

Foreign investors purchase of office buildings in DowntownDC declined from $1.4 billion in 2018 to $70 million in 2019, while the Rest of DC saw a slight increase from $560 million to $780 million. Foreign investors’ share of DowntownDC office sales in 2019 was just 7%, a substantial decrease from 45% in 2018. In the Rest of DC, foreign investors had a 24% share of sales, a decrease from 33% in 2018. From 2014 – 2018, foreign investors in DowntownDC were willing to pay 21% premium to domestic investors, or approximately $100 per SF more.

This high level of vacant space is an opportunity for attracting new office tenants or converting vacant buildings to other uses. The former home of the Children’s Defense Fund, 25 E Street NW, a 41,500 SF office building, is being converted into a hotel. The DowntownDC BID and the Golden Triangle BID are recommending to the District the creation of a modest office to residential conversion incentive program that will diversify DowntownDC’s building stock, provide a modest amount of middle income housing, shore up existing office supply and demand and provide a positive fiscal benefit to the city.

REGIONALOVERALLVACANCYRATE

RECORD LEVEL OF VACANT SF IS AN OPPORTUNITY

Over the past few years, 3.8 million SF of office has been developed in DowntownDC and the net absorption of office space was negative 1 million SF. As a result, DowntownDC saw an increase in vacant office space from 4.0 million to 8.8 million at the end of 2019—a record level. The Rest of DC had another 11.2 million SF of vacant office space, which is also a record high.

This high level of vacant space is an opportunity for attracting new office tenants or converting vacant buildings to other uses. The former home of the Children’s Defense Fund, 25 E Street NW, a 41,500 SF office building, is being converted into a hotel. The DowntownDC BID and the Golden Triangle BID are recommending to the District the creation of a modest office to residential conversion incentive program that will diversify DowntownDC’s building stock, provide a modest amount of middle income housing, shore up existing office supply and demand and provide a positive fiscal benefit to the city.

FOREIGN INVESTMENT IN DOWNTOWNDC OFFICE BUILDINGS DECREASED FROM $1.4 BILLION IN 2018 TO $70 MILLION IN 2019

Regional competition

Office tenant moves from DC to Northern Virginia in 2019 was at its lowest SF level since the BID began collecting data in 2000. Landlords continued to work very hard to keep their tenants by offering record concession packages.

A highlight of 2019 was The Carlyle Group’s moving of its Rosslyn-based employees into 70,000 SF of newly leased space at its 1001 Pennsylvania Avenue NW headquarters. In addition, the International Baccalaureate, a non-profit educational foundation, signed a lease for approximately 100,000 SF at 3900 Wisconsin Avenue NW, and the American Trucking Associations signed a 60,000 SF lease in Capitol Riverfront. All three moves into DC are very exciting.

However, Northern Virginia continues to attract most of the larger firms moving to the region, including Amazon, Nestle, Lidl, Bochtel, Parsons, Gerber and March of Dimes.

Amazon’s decision to open a second headquarters in Crystal City is a huge win for the region.

As of the first quarter of 2020, Amazon leased 850,000 SF. This drove down Crystal City’s vacancy rate from 20% in November 2018, when they selected Crystal City as the location for HQ2, to 13.8% at the end of 2019. As a result, landlords in Crystal City/ Pentagon City’s and the rest of Arlington are raising their asking rents modestly and reducing their concessions significantly, thus, making it less attractive to DC office tenants to move across the Potomac River.

DOWNTOWNDC HAS SEEN SEVERAL OFFICE TENANTS MOVE TO THE EMERGING SUBMARKETS OF NOMA AND SOUTHWEST DC

DOWNTOWNDC OFFICE DELIVERIES AND ABSORPTION

As of the first quarter of 2020, Amazon leased 850,000 SF. This drove down Crystal City’s vacancy rate from 20% in November 2018, when they selected Crystal City as the location for HQ2, to 13.8% at the end of 2019. As a result, landlords in Crystal City/ Pentagon City’s and the rest of Arlington are raising their asking rents modestly and reducing their concessions significantly, thus, making it less attractive to DC office tenants to move across the Potomac River.

DOWNTOWNDC HAS SEEN SEVERAL OFFICE TENANTS MOVE TO THE EMERGING SUBMARKETS OF NOMA AND SOUTHWEST DC
DC COMPETITION

While the city is doing very well in retaining its office tenants and attracting a few new ones, DowntownDC and the other traditional “core” submarkets (the Central Business District and the West End) have seen several tenants move to the emerging submarkets of NoMa and Southwest DC. In 2019, the U.S. Department of Justice completed its move out of approximately 1 million SF in DowntownDC to 840,000 SF in NoMa. Looking ahead, the law firm of Williams & Connolly LLP will be moving into 290,000 SF in Southwest DC when phase two of the District Wharf development project is completed. During 2019, the traditional core office submarkets lost over 700,000 SF of tenants and the emerging markets gained 850,000 SF. As the emerging markets continue to grow their amenity base, they will become more competitive on both price and amenities.

DowntownDC recorded a win when Aquicore, a commercial real estate software company, moved from Shaw into 16,710 SF at 401 Ninth Street NW.

DOWNTOWNDC is home to numerous media outlets.
HOTELS, TOURISM & CONVENTIONS

STRONG HOTEL MARKET CONTINUES IN 2019

DowntownDC again ranked as the nation’s fourth strongest hotel market after New York City, San Francisco and Boston. Record hotel demand and record hotel room supply translated into strong operating performance.

INVESTMENT CONTINUES IN DOWNTOWNDC HOTELS

Continued investment in the DowntownDC hotel market shows investor confidence in DowntownDC:

- Pebblebrook Hotel Trust’s former Donovan Hotel is undergoing a $25 million renovation and rebrand into Hotel Zena. The hotel will be managed by Viceroy Hotels & Resorts.
- The Riggs Washington, D.C. hotel opened in February 2020 after an estimated $50 million renovation by the Lore Group and Global Holdings.
- The W Hotel completed a $50 million renovation in July 2019.
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- Pebblebrook Hotel Trust’s former Donovan Hotel is undergoing a $25 million renovation and rebrand into Hotel Zena. The hotel will be managed by Viceroy Hotels & Resorts.

DOWNTOWNDC RANKED AS THE 4TH STRONGEST HOTEL MARKET IN THE NATION

DowntownDC again ranked as the nation’s fourth strongest hotel market after New York City, San Francisco and Boston. Record hotel demand and record hotel room supply translated into strong operating performance.

INVESTMENT CONTINUES IN DOWNTOWNDC HOTELS

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- The Riggs Washington, D.C. hotel opened in February 2020 after an estimated $50 million renovation by the Lore Group and Global Holdings.
- The W Hotel completed a $50 million renovation in July 2019.
- There were 33 hotels with 11,972 rooms in DowntownDC at the end of 2019, making up 35% of DC’s hotel rooms and 40% of its hotel revenues and sales taxes.

DOWNTOWNDC HOTEL PERFORMANCE

- Occupancy rate: 76.4% in 2018, 75.4% in 2019
- Average daily room rate: $289 in 2018, $265 in 2019
- Revenue per available room (a): $164 in 2018, $194 in 2019
- Room revenues (millions): $576 in 2018, $607 in 2019

Note: (a) RevPAR = Occupancy Rate * Average Daily Room Rate.
(b) High hotel performance due to Presidential Inauguration and the Women’s March in January 2017.
(c) Federal government shutdown ran from Dec 22, 2018 through Jan 25, 2019.

Source: Smith Travel Research
Future DowntownDC hotel development plans include three more hotels. Acumen Cos. has plans to build a 10 to 12 story hotel behind a set of row houses on the 500-block of H Street NW (north side) at a cost of $50 million, with plans to build a 10 to 12 story hotel behind a set of row houses on the 500-block of H Street NW (north side) at a cost of $50 million, with another set of row houses on the 500-block of H Street NW (north side) at a cost of $50 million.

DOWNTOWNDC.ORG

RECPAR COMPARISON: REGIONAL AND NATIONAL
(Revenue Per Available Room Night)

<table>
<thead>
<tr>
<th>Hotel Type</th>
<th>DowntownDC</th>
<th>Rest of DC</th>
<th>Berthoud / Rockville</th>
<th>Alexandria / Arlington</th>
<th>New York City</th>
<th>Boston / San Francisco</th>
<th>Chicago / Milwaukee / Los Angeles / Seattle</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>$177</td>
<td>$153</td>
<td>$92</td>
<td>$106</td>
<td>$255</td>
<td>$200</td>
<td>$146</td>
</tr>
<tr>
<td>2015</td>
<td>$184</td>
<td>$158</td>
<td>$91</td>
<td>$113</td>
<td>$248</td>
<td>$212</td>
<td>$153</td>
</tr>
<tr>
<td>2016</td>
<td>$196</td>
<td>$164</td>
<td>$96</td>
<td>$116</td>
<td>$242</td>
<td>$216</td>
<td>$154</td>
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<tr>
<td>2017</td>
<td>$207</td>
<td>$171</td>
<td>$101</td>
<td>$118</td>
<td>$241</td>
<td>$213</td>
<td>$156</td>
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<tr>
<td>2018</td>
<td>$192</td>
<td>$160</td>
<td>$100</td>
<td>$114</td>
<td>$247</td>
<td>$220</td>
<td>$161</td>
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<tr>
<td>2019</td>
<td>$194</td>
<td>$161</td>
<td>$101</td>
<td>$117</td>
<td>$238</td>
<td>$228</td>
<td>$156</td>
</tr>
</tbody>
</table>

Source: Smith Travel Research

RECORD DC VISITOR TRAVEL
Destination DC, the city’s tourism marketing arm, reported record visitor travel for 2018 (the latest date for which data is available) of 23.9 million—up 4.8% from 2017. Domestic visitor total was up by 5.3% to 21.9 million and international visitor total stayed flat. Contributing to this record visitation were (1) the reopening of the Smithsonian National Museum of Natural History’s Fossil Hall in June 2019 and (2) the portraits of former President Barack Obama and former First Lady Michelle Obama at the Smithsonian’s National Portrait Gallery.

WALTER E. WASHINGTON CONVENTION CENTER
The Walter E. Washington Convention Center had a relatively strong year with 1.06 million visitors, but down from the record 1.5 million visitors in 2018. Reasons for the decline include: the one-time boost from Major League Baseball All-Star Game’s fan activity event in 2018; two large conventions that come to DC in even numbered years; and a change in attendance counting methodology for the regional volleyball tournament that is an annual highlight. Destination DC booked 473,000 room nights from conventions held at the Walter E. Washington Convention Center. This represents 14% of the 2019 DowntownDC hotel room demand. This incremental demand is instrumental in maintaining DowntownDC’s ranking as the fourth strongest hotel market in the country.

Walter E. Washington Convention Center Attendance

<table>
<thead>
<tr>
<th>Year</th>
<th># of Events</th>
<th>Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>207</td>
<td>981,000</td>
</tr>
<tr>
<td>2011</td>
<td>199</td>
<td>998,000</td>
</tr>
<tr>
<td>2012</td>
<td>208</td>
<td>1,112,000</td>
</tr>
<tr>
<td>2013</td>
<td>201</td>
<td>1,179,000</td>
</tr>
<tr>
<td>2014</td>
<td>205</td>
<td>1,322,000</td>
</tr>
<tr>
<td>2015</td>
<td>233</td>
<td>1,150,000</td>
</tr>
<tr>
<td>2016</td>
<td>213</td>
<td>1,345,000</td>
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<tr>
<td>2017</td>
<td>177</td>
<td>1,176,000</td>
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<tr>
<td>2018</td>
<td>268</td>
<td>1,543,000</td>
</tr>
<tr>
<td>2019</td>
<td>455</td>
<td>1,960,000</td>
</tr>
</tbody>
</table>

Source: Events DC

HOTEL ROOM NIGHTS GENERATED BY DESTINATION DC FOR THE WALTER E. WASHINGTON CONVENTION CENTER

<table>
<thead>
<tr>
<th>Year</th>
<th>Room Nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>472,624</td>
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<tr>
<td>2011</td>
<td>480,137</td>
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<td>2012</td>
<td>493,870</td>
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<td>2013</td>
<td>490,389</td>
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<td>2014</td>
<td>503,463</td>
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<tr>
<td>2015</td>
<td>511,220</td>
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<tr>
<td>2016</td>
<td>518,225</td>
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<tr>
<td>2017</td>
<td>522,534</td>
</tr>
<tr>
<td>2018</td>
<td>525,885</td>
</tr>
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</table>

Source: Destination DC

1) Visitor Data is released as follows: Domestic visitation in May-June of each year for the prior year, and international visitation in August of each year for the prior year.
2) International visitors does not include visitors from Canada or Mexico.

ATTENDANCE FOR THE WALTER E. WASHINGTON CONVENTION CENTER

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestic</th>
<th>International</th>
<th>Total</th>
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<tr>
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<td>29,000</td>
<td>721,000</td>
</tr>
<tr>
<td>2011</td>
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<tr>
<td>2018</td>
<td>700,000</td>
<td>20,000</td>
<td>720,000</td>
</tr>
<tr>
<td>2019</td>
<td>701,000</td>
<td>19,000</td>
<td>720,000</td>
</tr>
</tbody>
</table>

Source: Destination DC

1) Visitor Data is released as follows: Domestic visitation in May-June of each year for the prior year, and international visitation in August of each year for the prior year.
2) International visitors does not include visitors from Canada or Mexico.
ANNUAL VISITORS TO NATIONAL MALL MEMORIALS AND MUSEUMS

MEMORIALS

- 2019
- Annual Average (2009-2018)

(millions)

Lincoln Memorial 7.8
World War II Memorial 6.9
Vietnam Veterans Memorial 4.2
Korean War Veterans Memorial 4.5
Martin Luther King Jr. Memorial 4.4
Franklin D. Roosevelt Memorial 2.8
Thomas Jefferson Memorial 2.0
Washington Monument 1.6

2019 TOTAL 31.2
2009-2018 ANNUAL TOTAL AVERAGE 29.2

(a) The Washington Monument was closed in 2012-2013 and from August 2016 to September 2019.
Source: The National Park Service

MUSEUMS

- 2019
- Annual Average (2009-2018)

(millions)

National Air and Space Museum 3.2
National Museum of Natural History 4.2
National Gallery of Art 4.2
National Museum of American History 6.9
National Museum of African American History and Culture 4.4
Holocaust Museum 4.3
National Museum of the American Indian 2.8
Hirshhorn Museum and Sculpture Garden 2.2
Smithsonian Castle 2.1

2019 TOTAL 21.2
2009-2018 ANNUAL TOTAL AVERAGE 29.8

(a) Smithsonian museums impacted by the federal government shutdown from December 22, 2018 - January 25, 2019 (35 days).
(b) The Air and Space Museum began a 7-year $650 million renovation in December 2018 that will result in partial closure of the building over this time period.
(c) The National Museum of Natural History’s Dinosaur Hall was closed for five years, from June 2014 to June 2019.
(d) Installed automated gate counters in 2019 that replaced handheld clicker counters.

Sources: Smithsonian, National Gallery of Art and the U.S. Holocaust Museum

10 MUSEUMS

- 2019
- Annual Average (2009-2018)

(millions)

National Air and Space Museum 3.2
National Museum of Natural History 4.2
National Gallery of Art 4.2
National Museum of American History 6.9
National Museum of African American History and Culture 4.4
Holocaust Museum 4.3
National Museum of the American Indian 2.8
Hirshhorn Museum and Sculpture Garden 2.2
Smithsonian Castle 2.1

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(a) Smithsonian museums impacted by the federal government shutdown from December 22, 2018 - January 25, 2019 (35 days).
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(c) The National Museum of Natural History’s Dinosaur Hall was closed for five years, from June 2014 to June 2019.
(d) Installed automated gate counters in 2019 that replaced handheld clicker counters.

Sources: Smithsonian, National Gallery of Art and the U.S. Holocaust Museum
Following a record 2018, DowntownDC welcomed 7.5 million visitors to its culture and entertainment venues in 2019—a solid performance. The Capital One Arena and DowntownDC’s 10 museums and eight performing arts venues had strong years, but the majority of venues recorded modest decreases in attendance compared to 2018 and the Spy Museum moved from DowntownDC to Southwest DC.

2019 attendance was down 20% from 9.4 million in 2018. This decrease is due primarily to the closure of the Spy Museum, the Newseum’s move to Southwest DC, and the decline in attendance at the Capital One Arena (mostly due to renovations) and the Smithsonian’s National Portrait Gallery (though 2019 was its second highest attendance year ever).

In 2016, attendance reached a high at the Capital One Arena with 2.7 million visitors. In 2019 and 2018, attendance was down to 2 million and 2.3 million, respectively, due to the substantial renovations it underwent which prevented its use for several weeks in both years. The renovation investment by Monumental Sports and Entertainment, the owners of Capital One Arena, was substantial: $40 million in the Summer of 2018, including concourse and concession upgrades and replacing all the seats; and $30 million in Fall 2019, including technology and concession upgrades (i.e., installing the largest 360-degree video screen in sports). Attendance in 2019 was also impacted by the Mystics’ move to the Entertainment and Sports Arena at St Elizabeths East for the 2019 WNBA season.

Also in 2019, Monumental Sports and Entertainment partnered with William Hill Plc., a company from the United Kingdom, to open a sportsbook in the former Greene Turtle Sports Bar and Grill space outside of the Capital One Arena. A William Hill Plc. affiliated company applied for a DC sports betting license in December 2019.
In 2019, the total attendance at DowntownDC’s 10 museums was 4.8 million, down 24% from 2018. When excluding the Spy Museum, which closed its doors at the end of 2018 and prepared its move to L’Enfant Plaza in early 2019, attendance was down 17%. Attendance at the National Portrait Gallery and Smithsonian American Art Museum was 1.7 million, its second highest total (though down from 2018’s record of 2.4 million), due to the continued interest in the portraits of former President Barack Obama and former First Lady Michelle Obama. On the other hand, the following museums all recorded attendance increases: National Law Enforcement Museum, National Museum of Women in the Arts and the Old Post Office Tower. The Newseum closed on December 31, 2019, with an estimated annual attendance of 800,000, leaving DowntownDC with nine museums accounting for 4 million of 2019’s visitor attendance. Combined with the closing of the Spy Museum, DowntownDC lost approximately 1.4 million annual museum visitors in the past two years.

In February 2020, DowntownDC welcomed the National Children’s Museum to the Ronald Reagan Building and International Trade Center. Planet Word, a museum to inspire a love of language in all its forms, is scheduled to open in 2020 at 13th and K Streets NW. The Milken Institute’s Center for Advancing the American Dream, dedicated to telling the stories of pioneers in education, health, entrepreneurship and job creating free enterprise, is scheduled to open in 2023 in a historic bank building located at 1501 – 1505 Pennsylvania Avenue NW. These new museums will boost DowntownDC’s museum total to 12 and should attract thousands of new visitors.

In 2019, DowntownDC’s overall performing arts attendance at its eight venues was down 4% in 2019 from 2018. However, Shakespeare Theatre Company’s venues and Ford’s Theatre reported attendance increases last year. The following three DowntownDC theatres were acknowledged with 2019 Helen Hayes Awards, which recognizes excellence in professional theater in the Washington, D.C. area: Ford’s Theatre (three awards), Shakespeare Theatre Company (three awards) and Woolly Mammoth Theatre (five awards).

**MUSEUMS ARE THE LARGEST SECTOR OF DOWNTOWNDC CULTURE & ENTERTAINMENT**

**PERFORMING ARTS VENUES ENLIVEN DOWNTOWNDC THROUGHOUT THE YEAR**

DowntownDC's attendance at its eight venues was down 4% in 2019 from 2018. However, Shakespeare Theatre Company's venues and Ford's Theatre reported attendance increases last year. The following three DowntownDC theatres were acknowledged with 2019 Helen Hayes Awards, which recognizes excellence in professional theater in the Washington, D.C. area: Ford's Theatre (three awards), Shakespeare Theatre Company (three awards) and Woolly Mammoth Theatre (five awards).
DOWNTOWN DC RETAIL VACANCY RATE HISTORY

Source: Duchter & Alexander (2017 - 2019) and DowntownDC BID (2010 - 2016)
(a) Adjusted for announced closing of Bed, Bath & Beyond.

AS OF FEBRUARY, 2020
13 RESTAURANTS HAVE ANNOUNCED OPENINGS, TWO RESTAURANTS CLOSED AND FOUR RETAIL STORE OPENINGS WERE ANNOUNCED.
DOWNTOWN DC RETAIL SPACE OVERVIEW

Square feet

Total Possible Retail Space 4,671,331

3,517,230 Occupied and Announced Space

Vacant 475,294

Planned 110,436

Under Construction 60,879

Non-Retail First Floor 617,724

Food and Beverage 1,648,725 47%

Shoppers' Goods 1,064,620 30%

Other Retail 803,886 23%

Source: Dochter & Alexander 2019 Downtown Retail Survey

DOWNTOWNDC RESTAURANT HISTORY

Source: DowntownDC BID

Number of Restaurants at End of Year


140 145 143 147 145 152 156 162 158 154

Net Change (2) (5) (2) 4 (2) 7 4 6 (4) (4)

Openings 4 10 3 10 3 10 9 11 6 10

Closings (6) (5) (5) (6) (3) (3) (5) (10) (14)

IN 2019

10 Opened

Boqueria, Cherry, Estuary, Matchbox (E Street), Mazi DC, Olivia Restaurant, Punjab Grill, SPIN Washington DC, The Boardwalk DC and Via Sophia

14 Closed

14K Restaurant and Lounge, Del Frisco’s Double Eagle Steakhouse, Iron Horse Tap Room, La Tasca, Matchbox (H Street), NoPa Kitchen+Bar, Penn Commons LLC, Pennsylvania 6, Pinea, Proof Restaurant, Scotts Restaurant, SEI, The Green Turtle Sports Bar & Grille and Woodward Table

3 Opened

Cranes, Café Riggs and Tonasi

10 Announced

The Ardent, Cheesecake Factory, Dauphine’s, Eddie V’s Prime Seafood, Farmbird, The Henri, Philotimo DC, Shōtō Zuma, Truluck’s Seafood and Yardbird Southern Table & Bar

2 Closed

Bar Louie and Claudia’s Steakhouse

IN 2020

3 Opened

Apple Flagship Store and DC History Center, Tiffany & Co. and Brunello Cucinelli

4 Closed

Forever 21, Illuminations Inc., Spy Museum Store and Sam’s Gifts

4 Announced

Chanel, Giorgio Armani, Akris at CityCenterDC and Lululemon

1 Closed

UnoPolo

1 Announced Closing

Bed Bath & Beyond

DESTINATION RESTAURANT OPENINGS AND CLOSINGS

TOTAL POSSIBLE RETAIL SPACE

55,555

Food and Beverage

36,414

Shoppers’ Goods

25,270

Other Retail

15,144

Banks and Financial Institutions

196,624

Fitness

175,054

Entertainment

162,643

Hair Goods and Stylists

96,100

Salon and Spa

66,887

Childcare

36,465

Medical

29,270

Education

23,519

Source: DowntownDC BID (2010 - 2016)

DOWNTOWN DC SHOPPING HISTORY

Number of Stores at End of Year

2010 2011 2012 2013(a) 2014(a) 2015(a) 2016 2017 2018 2019

55 55 55 56 68 80 81 84 80 78

Net Change - - - 1 12 12 1 3 (4) (2)

Openings 2 2 2 1 12 12 2 3 - 3

Closings (2) (2) (2) - - (1) - - (4) (3)\(^{1}\)

\(^{1}\) Includes the announced closing of Bed, Bath & Beyond.

Source: Dochter & Alexander (2017 - 2019) and DowntownDC BID (2010 - 2016)
THANK YOU: JOHN, GINGER & CLYDE’S

From its early beginnings in the 1960s to today, Clyde’s Restaurant Group has been a cornerstone for the communities it serves and the city where it launched. The original Clyde’s opened in 1963 in Georgetown under the direction of founder Stuart Davidson who stated, “[he] would rather eat in a saloon than drink in a restaurant.” Five years later Davidson took a young and eager John Laytham, who had been working his way up at the restaurant, as his partner. Their lasting friendship and business acumen grew Clyde’s Restaurant Group into the regional leader it is today with 14 restaurants and music venues including Old Ebbitt Grill at 15th and G Streets, Clyde’s at Gallery Place at 7th and G Streets NW, and The Hamilton and Hamilton Live at 14th and F Streets NW in DowntownDC.

After Davidson died in 2001, John Laytham and his wife Ginger Laytham, another key partner in the growth and success of the Clyde’s Restaurant Group, continued with the group’s philanthropic tones giving their time on various city boards, including the DowntownDC BID, Restaurant Association of Metropolitan Washington and other regional business organizations. Ginger Laytham was the driving force behind the Georgetown Metropolitan Bus, affectionately known for years as the, “Blue Bus,” which was taken over in 2010 by the city’s DC Circulator as part of its citywide fleet. The popular route continues to provide a connection to Metro stations and serves as an inexpensive transit route for workers from Rosslyn, Virginia and the west end of DC to access jobs in Georgetown.

In July 2019, Clyde’s Restaurant Group including Old Ebbitt Grill, was purchased by Graham Holdings Co. following the death of John Laytham earlier in the year. At the 2019 Restaurant Association of Metropolitan Washington annual RAMMY’s awards the organization announced it would rename their leadership award to the John G. Laytham Exceptional Leadership and Impact Award. Mayor Muriel Bowser declared November 12 in 2019 to be John Laytham Day in Washington, D.C., which would have been his 75th birthday.

Over the past sixty years, Clyde’s has provided DC residents with thousands of jobs, launched numerous careers and graciously gave back to its neighbors and communities with a generosity that seems never-ending. The DowntownDC BID sends their deepest appreciation to the Laytham’s and the entire Clyde’s Restaurant Group family.

Today, Clyde’s continues to provide the District with excellent dining and entertainment under the ownership of Graham Holdings Company and the leadership of Tom Meyer, President, Clyde’s Restaurant Group and a member of the BID’s Board of Directors.

DOWNTOWNDC OFFERS MICHELIN-STARRED RESTAURANTS AND MICHELIN’S BIB GOURMAND LIST

DowntownDC offers top quality restaurants earning Michelin stars and making Michelin’s Bib Gourmand List year after year. Since Fall 2016, when the Michelin Guide began rating DC restaurants, two DowntownDC restaurants have earned stars each year: Jose Andres’ minibar with two stars and Fabio Trabocchi’s Fiola with one star. New last year, Sushi Nakazawa earned one star. Furthermore, Jose Andres’ China Chilcano, Jaleo, Oyamel and Zaytinya made the Michelin’s Bib Gourmand List for four consecutive years.

RETAIL OPPORTUNITIES ABUND

There is 475,000 SF of vacant space in DowntownDC, with approximately 150,000 SF along F and Seventh Streets. In addition, DowntownDC has over 500,000 SF of ground floor space that is used as office space, of which more than 50% could be converted to retail. There is 61,000 SF of retail space under construction and 110,000 SF of planned space, including 29,000 SF at CityCenterDC.

The renovation of Franklin Park will include a full-service restaurant pavilion. A request for proposal will be released in May or June 2020.

DOWNTOWNDC SHOPPING IS SUPPORTED BY

295,000 WORKERS (A)
54,000 RESIDENTS (B)
15,000 HOTEL GUESTS (C)

(A) WITHIN 10 BLOCKS OF 9TH AND G STREETS NW
(B) WITHIN ONE-MILE OF 9TH AND G STREET NW
(C) 3.8 MILLION UNIQUE HOTEL GUESTS PER YEAR
DOWNTOWNDC LIVING

RECORD APARTMENT RENTS AND LOWER CONDO PRICES

DowntownDC’s apartment rents increased to a record level in 2019 to $3.30 per SF, up 4% over 2018, and a 1 cent more than the previous record of $3.29 per SF set in 2016. The 4% increase also reversed two years of modestly declining rents. However, DowntownDC’s rental growth trailed most of the Rest of DC and the region, which saw rent increases from 2.4% to 6.4%.

Condominium prices in DowntownDC decreased 7% from $661 per SF in 2018 to $617 in 2019. Sales volume was the same as previous years at 7% of total condo inventory. CityCenterDC led this decline with condo prices decreasing 15%, but still reporting strong average prices of $870 per SF. The Rest of DC and the region all experienced modest condo price increases of 0.4% to 3.2%. Manhattan, Boston and San Francisco’s average condo/co-op prices were $1,695, $1,247 and $1,140 per SF, respectively, much higher than the average in DowntownDC.

EFFECTIVE RESIDENTIAL RENT RATES ($ per SF per month)

- DowntownDC BID Area
  - 2009: $2.73
  - 2010: $2.82
  - 2011: $2.89
  - 2012: $3.03
  - 2013: $3.05
  - 2014: $3.17
  - 2015: $3.26
  - 2016: $3.19
  - 2017: $2.73
  - 2018: $2.82
  - 2019: $2.73

- Near DowntownDC
  - 2009: $3.18
  - 2010: $3.06
  - 2011: $3.22
  - 2012: $3.13
  - 2013: $3.09
  - 2014: $3.27
  - 2015: $3.47
  - 2016: $3.36
  - 2017: $3.36
  - 2018: $3.66
  - 2019: $3.39

- DC
  - 2009: $2.62
  - 2010: $2.66
  - 2011: $2.69
  - 2012: $2.64
  - 2013: $3.05
  - 2014: $3.17
  - 2015: $3.47
  - 2016: $3.36
  - 2017: $3.71
  - 2018: $3.38
  - 2019: $3.36

- Bethesda
  - 2009: $2.76
  - 2010: $2.76
  - 2011: $2.77
  - 2012: $2.75
  - 2013: $2.74
  - 2014: $2.73
  - 2015: $3.00
  - 2016: $3.08
  - 2017: $3.86
  - 2018: $3.01
  - 2019: $3.07

- Rosslyn-Ballston Corridor
  - 2009: $2.50
  - 2010: $2.63
  - 2011: $2.71
  - 2012: $2.68
  - 2013: $2.68
  - 2014: $2.77
  - 2015: $2.72
  - 2016: $2.78
  - 2017: $2.96
  - 2018: $3.03

Source: Delta Associates
(a) Includes the area five blocks north and west of the DowntownDC BID boundary.
NEW RESIDENTIAL PROJECTS

There haven’t been any new residential projects since the opening of CityCenterDC’s 458 apartments and 216 condos in 2014, which brought DowntownDC’s total market-rate multi-family units to 6,020. Currently, there are three residential projects planned for a total of 502 units.

Monument Realty announced the change of residential plans for 624 Eye Street, from condos to 130 high-end apartments with ground floor retail. It will share a garage in conjunction with an office building, built simultaneously with the apartments, that fronts H Street.

In February 2020, a joint venture between Lincoln Property Company and Cadillac Fairview purchased the existing 84,000 SF office building at 1313 L Street NW for $34.7 million and announced its plan to demolish the existing building and construct a Class A apartment building with 222 units. One of the three remaining buildings in the Capitol Crossing project is planned as a 150-unit residential building. No groundbreaking date has been set.

CityCenterDC is home to 458 apartments and 216 condos.
STATE OF DOWNTOWN 2019

REGIONAL POPULATION (thousands)

- DC
- Suburban Maryland (a)
- Northern Virginia (b)
- Total (b)

Source: U.S. Census Bureau; The Stephen S. Fuller Institute at GMU
(a) 2018 is an estimate.
(b) Includes Jefferson, WV.

CURRENTLY THERE ARE

3 RESIDENTIAL PROJECTS PLANNED FOR A TOTAL OF

502 UNITS

DOWNTOWNDC AND DC DEMOGRAPHICS 2019

DOWNTOWNDC

TOTAL POPULATION: 10,994

RACE ▼

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<tr>
<th>Race</th>
<th>1990</th>
<th>2000</th>
<th>2010</th>
<th>2018</th>
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<td>White</td>
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<td>47%</td>
<td>48%</td>
<td>55%</td>
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<td>18%</td>
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AGE ▼

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<th>20-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>Over 55</th>
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<td>28%</td>
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<td>11%</td>
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</tr>
<tr>
<td>Hispanic</td>
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<td>10%</td>
<td>10%</td>
<td>10%</td>
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</tr>
<tr>
<td>Asian</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
</tr>
</tbody>
</table>

EDUCATIONAL ATTAINMENT ▼

Not Completed High School | Completed High School | Bachelor’s Degree | Graduate/Professional Degree
7% | 14% | 30% | 50%

HOUSEHOLD ▼

TOTAL HOUSEHOLDS: 6,254

Average Household Size: 1.5

20% Owner Occupied

Median Home Value: $605,000

Share of Households With Incomes of $75,000 or More: 68%

HOUSEHOLD INCOME ▼

Average Annual Income: $152,165

Median Income: $112,657

DC

TOTAL POPULATION: 702,321(b)

RACE ▼

<table>
<thead>
<tr>
<th>Race</th>
<th>1990</th>
<th>2000</th>
<th>2010</th>
<th>2018</th>
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<td>45%</td>
<td>45%</td>
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<tr>
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<td>12%</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>Asian</td>
<td>17%</td>
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<tr>
<td>Other</td>
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AGE ▼

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<th>35-44</th>
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<tr>
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<td>23%</td>
<td>32%</td>
<td>16%</td>
<td>12%</td>
<td>15%</td>
</tr>
<tr>
<td>Hispanic</td>
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<td>10%</td>
<td>10%</td>
</tr>
<tr>
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<tr>
<td>Other</td>
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<td>1%</td>
<td>2%</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
</tr>
</tbody>
</table>

EDUCATIONAL ATTAINMENT ▼

Not Completed High School | Completed High School | Bachelor’s Degree | Graduate/Professional Degree
10% | 33% | 24% | 34%

HOUSEHOLD ▼

TOTAL HOUSEHOLDS: 311,228

Average Household Size: 2.1

41% Owner Occupied

Median Home Value: $640,000

Share of Households With Incomes of $75,000 or More: 54%

HOUSEHOLD INCOME ▼

Average Annual Income: $125,544

Median Income: $82,381

Source: ERSI forecasts courtesy of Washington DC Economic Partnership
(a) ERSI data as of July 2019.
(b) U.S. Census Bureau estimated D.C. population to be 705,749 as of July 1, 2019.
(c) Includes people who have completed some college and Associate Degrees.
DOWNTOWNDC IS THE HEART OF OUR TRANSIT SYSTEM

DowntownDC sits at the center of the region’s rail and bus transportation system, giving the area a strong competitive advantage. It has seven Metrorail stations serving all system lines, including Metro Center and Gallery Place-Chinatown—two major hubs for transit in the region.

On an average weekday, DowntownDC receives more than 88,000 workers, visitors and residents from its stations and more than 31,000 on an average weekend day. Six of the seven Metrorail stations in DowntownDC had increased ridership in 2019.

TRANSPORTATION

METROCAR

AVERAGE DAILY METRORAIL EXITS IN DOWNTOWNDC

<table>
<thead>
<tr>
<th>Station</th>
<th>Average Weekday Total</th>
<th>Average Weekend Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metro Center</td>
<td>8,245</td>
<td>7,809</td>
</tr>
<tr>
<td>Gallery Place</td>
<td>10,526</td>
<td>14,493</td>
</tr>
<tr>
<td>McPherson Square</td>
<td>3,159</td>
<td>7,809</td>
</tr>
<tr>
<td>Judiciary Square</td>
<td>1,436</td>
<td>7,442</td>
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<tr>
<td>Federal Triangle</td>
<td>2,480</td>
<td>2,720</td>
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<tr>
<td>Archives</td>
<td>1,325</td>
<td>2,720</td>
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<tr>
<td>Average Exits (Weekday)</td>
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</tr>
<tr>
<td>Average Exits (Weekend)</td>
<td>31,890</td>
<td></td>
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Source: WMATA

MAJOR MILESTONES FOR METRORAIL

The number of people who rode Metrorail increased in 2019 for the first time since 2011. Over 157 million trips were taken on Metrorail in 2019, of which 22 million came to DowntownDC. This means that with only 7% of the stations in the system, DowntownDC represents 14% of the total system ridership.

It was a good year for the system as it began to truly recover after SafeTrack, the Washington Metropolitan Area Transportation Authority’s (WMATA) plan to improve safety and reliability throughout Metrorail, which officially ended in 2017.
It was also the first year that WMATA began receiving dedicated funding from the three major jurisdictions it serves: the District of Columbia, Maryland, and Virginia. Spurred by the region’s bid for Amazon HQ2, this historic agreement created a new funding stream of $500 million per year to fund capital improvements.

**IN 2019, 22 MILLION METRO RAIL TRIPS CAME TO DOWNTOWNDC**

WMATA’s proposed budget for the 2021 fiscal year partially restores late-night service—2:00 a.m. on Fridays and Saturdays, and until 12:00 a.m., Mondays through Thursdays. These later hours are essential to the vibrancy and appeal of Downtown DC. Their passing will help the District and its residents to thrive. Building upon the recent successes of WMATA, they will only enhance mobility in the region and strengthen its ability to attract talent, retain residents, connect people to opportunities and improve the productivity of our workforce.

**CHANGING NATURE OF MOBILITY IN DOWNTOWNDC**

The very nature of mobility is changing and DowntownDC is on the leading edge of changes to safely accommodate the new ways in which people move around the city. One of the biggest changes happening to mobility is the advent of dockless electric bicycles and scooters. In 2019, the District Department of Transportation (DDOT) began to set standards and limitations with which companies operating dockless fleets in the District will need to comply. As part of this new program, DDOT can permit 10,000 or more electric scooters to operate city-wide.

To address safety and better knit dockless vehicles into the fabric of our streets, five in-street parking locations for dockless electric vehicles (called Micromobility Zones) were installed in DowntownDC in 2019. Planning to quadruple the number of Micromobility Zones in DowntownDC for 2020 began in 2019. The District also began adding “dismount zone” stencils to sidewalks in DowntownDC, reminding users that it is illegal to ride on the sidewalk.

Not all bikeshare is dockless in DowntownDC as the area remains a hugely popular hub for Capital Bikeshare. DowntownDC hosts a total of 33 stations which received nearly 500,000 trips in 2019. The highest volumes occurred in July and August, at 68,000 and 65,000 trips, respectively.

The District also began to change the way it manages space traditionally reserved for parking. Pick-Up/Drop-off (PUDO) zones were implemented as a way to better manage high volumes of commercial and passenger pick-up and drop-off adjacent to the sidewalk. PUDO zones help to improve safety and ease congestion by eliminating the need to double park in a travel lane. Four PUDO zones were installed in DowntownDC in 2019.

The 7th Street Pedestrian Improvement Project was implemented to improve safety and comfort for pedestrians and drivers on one of DowntownDC’s busiest corridors. DDOT restriped 7th Street NW from Pennsylvania Avenue to I Street, adding “bump outs” and over 50 planters at corners to give pedestrians more space, slow down vehicles and beautify the street.

**BUS TAKES CENTER STAGE**

In 2019, several moves were made to embrace the adaptability and cost-effectiveness of bus travel as a tool for moving more people around more efficiently. In June 2019, on H and I Streets NW, just south of Franklin Park, DDOT and WMATA piloted two dedicated lanes for bus travel only, known as bus priority lanes. In November 2019, these lanes, which serve over 20% of all Metrobus riders, were made permanent.

A vision for a first-of-its-kind transitway on K Street NW became a reality in 2019 when Mayor Bowser pledged $122 million to build the K Street Transitway, in the heart of DowntownDC. Planning for the transitway kicked-off later in the year. The plan includes center-running dedicated bus lanes and bike lanes along K Street NW between 12th and 21st Streets. Construction is anticipated to start for this project in 2021.

Also, in 2019, WMATA engaged in a comprehensive visioning and planning exercise for bus service, called the Bus Transformation Project. Key recommendations from the plan included the use of bus priority lanes and more frequent and convenient bus service. As WMATA and DDOT continue their work to ensure bus as a mode of choice, the ease at which people can move about our region increases, and the vision for a highly efficient, transit rich hub in DowntownDC becomes a closer reality.

**IN 2019, MAYOR BOWSER PLEDGED $122 MILLION TO BUILD THE K STREET TRANSITWAY**

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Electric bikes in DowntownDC

### Regional Capital Bikeshare System Data

<table>
<thead>
<tr>
<th>Number of Bicycles</th>
<th>Number of Stations</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,170</td>
<td>114</td>
</tr>
<tr>
<td>1,200</td>
<td>189</td>
</tr>
<tr>
<td>2,600</td>
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<tr>
<td>2,800</td>
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<tr>
<td>3,070</td>
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<td>4,170</td>
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<tr>
<td>4,150</td>
<td>526</td>
</tr>
<tr>
<td>4,350</td>
<td>578</td>
</tr>
</tbody>
</table>

Source: Capital Bikeshare and DowntownDC BID

**Residents commuting without a car and households without a car**

<table>
<thead>
<tr>
<th>DC</th>
<th>Boston</th>
<th>Seattle</th>
<th>San Francisco</th>
</tr>
</thead>
<tbody>
<tr>
<td>60.7</td>
<td>55.4</td>
<td>48.6</td>
<td>30.5</td>
</tr>
</tbody>
</table>

Source: American Community Survey 2017 and 2018
FRANKLIN PARK GETS SET FOR REFURBISHMENT

After over a decade of planning, Franklin Park (Park), DowntownDC’s largest park space, cleared two final hurdles to prepare it for reconstruction in 2020. All necessary design and planning work for the redesign of the Park started in 2019 and the permit process for the reconstruction of the Park was initiated at the end of 2019. Due to the complex nature of the Park ownership, several management and operations agreements needed to be developed and signed by multiple government agencies and the BID. In 2019, a cooperative management agreement, memorandum of understanding agreement, and design and construction agreement, between the National Park Service, the District Department of General Services, the District Department of Parks and Recreation and the BID were all executed. Construction is set to begin in Spring 2020 and the Park is scheduled to open in 2021. Renovation will transform Franklin Park into a vibrant, enticing and welcoming public park for all to enjoy. The project has a total cost of $18 million and is being funded by the government of the District of Columbia. The Park will be managed and operated by the BID with an anticipated annual budget of $700,000.

BEAUTIFICATION OF PARKS AND PUBLIC SPACE

The BID provided beautiful and impactful public space treatments to over 31 parks and plazas and along three key corridors in DowntownDC. In addition to the vital maintenance, planting, and trash removal work that the BID provide, it also brought seven red bistro tables and 50 chairs to McPherson Square Park and over 200 hanging baskets and 286 landscaped planters across all of DowntownDC. The corridors of New York Avenue NW, Pennsylvania Avenue NW, and 7th Street NW were all spruced up with new and vibrant plantings. The aesthetically pleasing nature of these treatments serve to enhance the experience of all passersby, while providing enhanced safety for road users by creating buffer zones and/or slowing down cars.
**DOWNTOWNDC FOUNDATION**

The BID’s work to enhance DowntownDC made it clear that additional resources were needed in specific service areas. As a result, the BID in 2019 funded and staffed the DowntownDC Foundation, a 501(c)(3) non-profit corporation. The Foundation seeks out and secures support for four key philanthropic initiatives: Franklin Park, which will be operated and managed by the BID following its renovation and reopening; homeless services, including the work carried out at the Downtown Day Services Center (The Center); public space revitalization in additional parks, plazas and other public space locations throughout DowntownDC; and events and programming. The Foundation enables the BID to address a higher level of service to sustain a vibrant downtown economy and maintain its competitiveness in the regional economy.

**DOWNTOWN DAY SERVICES CENTER**

One of the BID’s most meaningful achievements in 2019 was the opening of the Downtown Day Services Center (The Center) at the New York Avenue Presbyterian Church in February 2019. Through a $1.7 million grant from the DC Department of Human Services (DHS), the BID opened The Center to provide services for people experiencing homelessness in DowntownDC. This state-of-the-art center provides much-needed services to men and women Monday through Friday from 9:00 a.m. – 5:00 p.m. Services provided at The Center include daily hot lunches and snacks, case management, social security and veterans’ benefits, identification cards and licenses, hot showers and haircuts, laundry services and medical care. Between February 2019 and December 2019, The Center served over 33,000 clients, provided nearly 7,000 showers and served over 29,000 lunches. In 2019, 48 individuals were moved into permanent supportive housing. During 2019, The Center clients increased from 80 individuals a day to between 102 to 150 a day. The Center’s major partners, DHS, Pathways to Housing DC, Unity Healthcare and HIPS, and all those involved continue to guide us as we work toward Mayor Bowser’s goal to end homelessness in the city.

**DOWNTOWNDC CALL BOXES**

In October of 2019, the BID unveiled the restoration and refurbishment of eight emergency call boxes on street corners throughout DowntownDC. Funded jointly by the DowntownDC BID and a $88,000 grant from the DC Commission on Arts and Humanities, the call boxes profile the contributions of eight prominent women in local and national history.

**DOWNTOWNDC CONTINUES STAKEHOLDER OUTREACH**

The BID continues working with stakeholders, particularly the DC Metropolitan Police Department, the Metro Transit Police Department and the United States Park Police to focus and support mitigating disorder and crime. Crime in DowntownDC was up in 2019 from 2018 with a reported increase in thefts, robberies, and assault with weapons, the vast majority of which were thefts. In DowntownDC in 2019, there were a total of 2,266 total crimes with 2,107 of those in reported property crimes. There were 2,016 incidents of thefts, an increase from 1,616 in 2018. There were 95 robberies, an increase of 27%, and 52 assaults, an increase of 18%. Burglary incidents decreased 30% to 33 reported incidents. There were no reports of homicides in DowntownDC in 2019, even as those numbers have seen a slight uptick in recent years across the city (166 in the District total). Citywide total crimes increased to 34,007 in 2019 from 33,863 in 2018 (a slight increase of 144 incidents).

**NOTICE**

The number of nighttime unsheltered homeless individuals counted in DowntownDC is the function of many factors: weather (rain and temperature), the economy and services available for mental health treatments, housing and other social services.

NIGHTTIME UNSHELTERED INDIVIDUALS IN DOWNTOWNDC

- 2019
- 2018

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<thead>
<tr>
<th>Month</th>
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</thead>
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<td>102</td>
<td>56</td>
</tr>
<tr>
<td>Feb</td>
<td>144</td>
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<tr>
<td>Mar</td>
<td>150</td>
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<td>Apr</td>
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<td>Jul</td>
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<td>Aug</td>
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<td>Sep</td>
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<tr>
<td>Oct</td>
<td>56</td>
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<tr>
<td>Nov</td>
<td>63</td>
<td></td>
</tr>
<tr>
<td>Dec</td>
<td>60</td>
<td></td>
</tr>
</tbody>
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Source: DowntownDC BID and MWCOG
ANNUAL REPORTED CRIME INCIDENTS IN THE DOWNTOWNDC BID AND DC

**DOWNTOWNDC ANNUAL CRIME INCIDENTS**

<table>
<thead>
<tr>
<th>Year</th>
<th>2013-2017 Average</th>
<th>2018</th>
<th>2019</th>
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<tr>
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<td>2,040</td>
<td>1,848</td>
<td>2,266</td>
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**Change in 2019** +22%

**DC ANNUAL CRIME INCIDENTS**

<table>
<thead>
<tr>
<th>Year</th>
<th>2013-2017 Average</th>
<th>2018</th>
<th>2019</th>
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<tr>
<td></td>
<td>37,815</td>
<td>33,863</td>
<td>34,007</td>
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</table>

**Change in 2019** +0.4%

**CRIME BREAKOUT DOWNTOWNDC BID BY THE NUMBERS**

<table>
<thead>
<tr>
<th>Category</th>
<th>2018</th>
<th>2019</th>
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<tbody>
<tr>
<td>Robbery</td>
<td>75</td>
<td>95</td>
</tr>
<tr>
<td>Assault with Weapon</td>
<td>44</td>
<td>52</td>
</tr>
<tr>
<td>Burglary</td>
<td>47</td>
<td>33</td>
</tr>
<tr>
<td>Theft</td>
<td>1,616</td>
<td>2,016</td>
</tr>
</tbody>
</table>

**Change in 2019**
- Robbery: +27%
- Assault with Weapon: +18%
- Burglary: -30%
- Theft: +25%

Source: Metropolitan Police Department and DowntownDC BID

The BID provided beautiful and impactful public space treatments to over 31 parks and plazas and along three key corridors in DowntownDC in 2019.
THE DOWNTOWNDC BID THANKS THE FOLLOWING FOR THEIR CONTRIBUTIONS TO THIS REPORT:

Akridge  
Carr Properties  
CityCenterDC  
Clyde’s Restaurant Group  
CoStar Group, Inc.  
Cushman & Wakefield  
DC Office of the Chief Financial Officer  
Delta Associates  
Destination DC  
Dochter & Alexander Retail Advisors  
ESRI  
Events DC  
Ford’s Theatre  
Hines  
International Spy Museum  
JBG Smith  
JLL  
The Mayhood Company  
Lincoln Property Company  
Metropolitan Police Department of DC  
Metropolitan Washington Council of Governments  
Monumental Sports & Entertainment  
US National Archives  
National Building Museum  
National Gallery of Art  
National Law Enforcement Museum  
National Museum of Women in the Arts  
National Portrait Gallery  
National Theatre  
Naval Heritage Center  
Oxford Properties  
Property Group Partners  
The Residences at CityCenter  
Shakespeare Theatre Company  
Sixth & I Historic Synagogue  
Smith Travel Research  
Smithsonian Institution  
Stephen S. Fuller Institute  
US Bureau of Labor Statistics  
US Census Bureau  
US Department of Commerce, Office of Travel and Tourism Industries  
US General Services Administration  
US National Park Service  
US Holocaust Memorial Museum  
Washington Metropolitan Area Transit Authority  
Warner Theatre  
Washington DC Economic Partnership  
Woolly Mammoth Theatre  

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Lulu Liu, Senior Accountant  
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Nabavi Oliver, Director of Administration  
Gerren Price, Director of Public Space Operations  
Gerry Widdicombe, Director of Economic Development  

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PHOTOGRAPHY  
Phelan Marc Media, CityCenterDC, Mia Montgomery, Riggs Hotel, Bob Rives, Moya Design Partners, Flickr: thisisbossi  

THANK YOU FOR YOUR CONTRIBUTIONS IN 2019 AND YOUR CONTINUED SUPPORT IN THE FUTURE