

# INTRODUCTION

Friendship Heights is a regional shopping destination for residents of northwestern District of Columbia and central Montgomery County. While many of the region's older retail centers have been unable to compete with newer retail centers in suburban locations, the Friendship Heights retail area remains a vital and competitive presence in the Washington area.

Retailing in Friendship Heights serves a neighborhood and regional function. The neighborhood retail facilities serve nearby households with groceries and other day-to-day goods and services. The area's full range of comparison shopping, including general merchandise, apparel, home furnishings, and four department stores draws shoppers from the larger region.

## Purpose

The primary objective of this report is to evaluate the Friendship Heights retail market. The report discusses the overall retail character of the area, including the retail mix and retailing trends' impact on Friendship Heights. An analysis of the supportable square feet of grocery/drug stores and comparison retail provides a basis of need and gives a degree of measurement of what is demanded by market area households.

## Area under Study

The study area includes retail space located on both the Montgomery County side of Friendship Heights and in the District of Columbia. As shown on the following map, the boundaries of the study area extend from North Park Avenue to the north, to Harrison Street to the south. Retailing in Friendship Heights is concentrated along Wisconsin Avenue. Additional retail space is located within a two- to three-block area to the west of Wisconsin Avenue.

## Organization

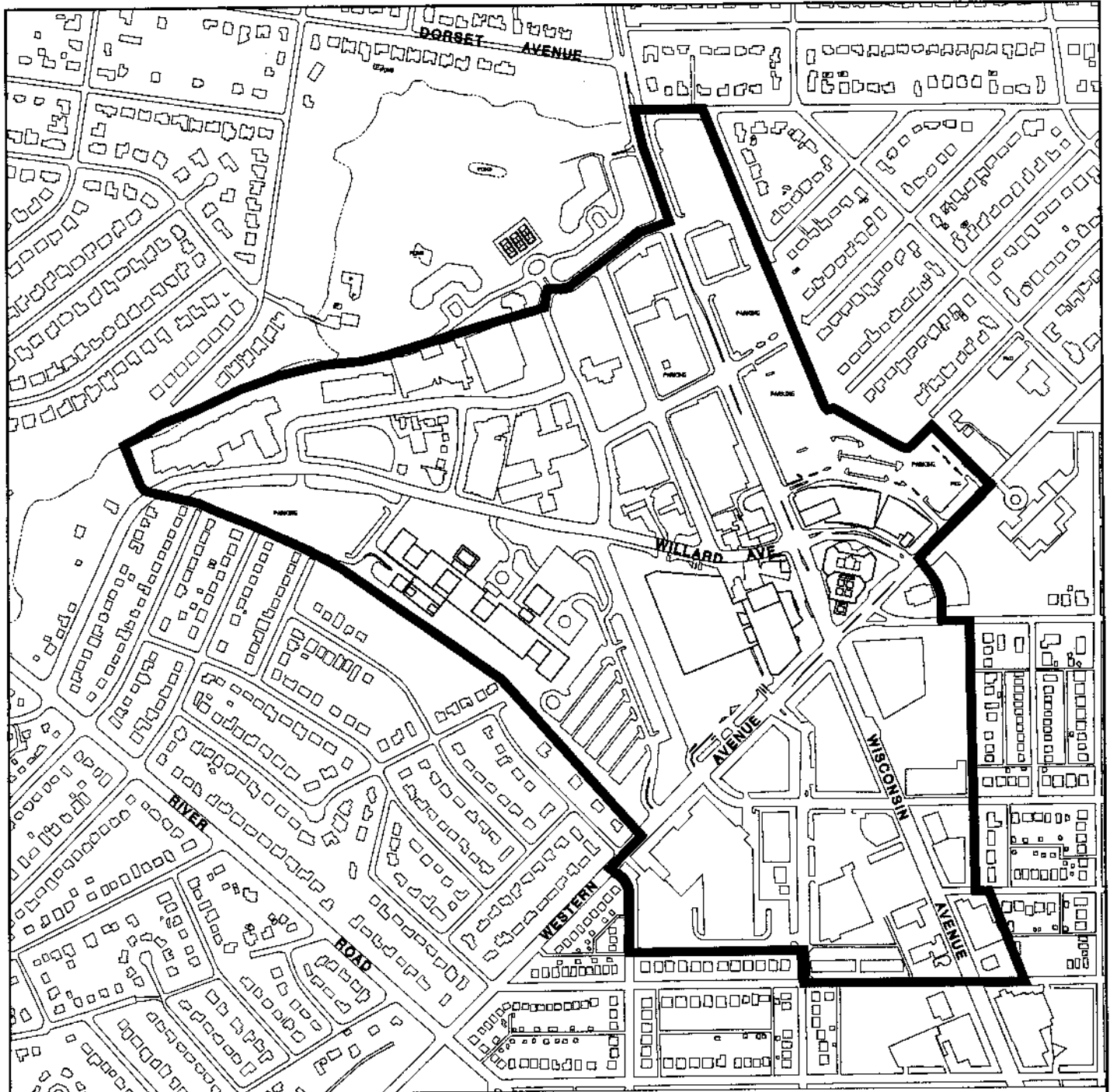
This report contains four sections::

|                                  |  |
|----------------------------------|--|
| Executive Summary                | major recommendations, findings and trends.  |
| Retailing in Friendship Heights  | overall character, market conditions, observations, comments from retailers, and summary of proposed projects in the study area. |
| Retail Market Analysis           | amount of grocery/drug store space and comparison goods space supportable.   |
| Trends in the Retailing Industry | major themes and forms evolving in the retailing industry and their relevance to Friendship Heights.                             |

Throughout the report, anecdotal quotations from retailers and management are presented which further elaborate on a major theme or issue related to retailing in the Friendship Heights area. They are set off from the text by heavy black lines and italics.

# Retail Study Area

Map 1



## LEGEND



STUDY AREA BOUNDARY



North

SCALE:  
1" = 600'