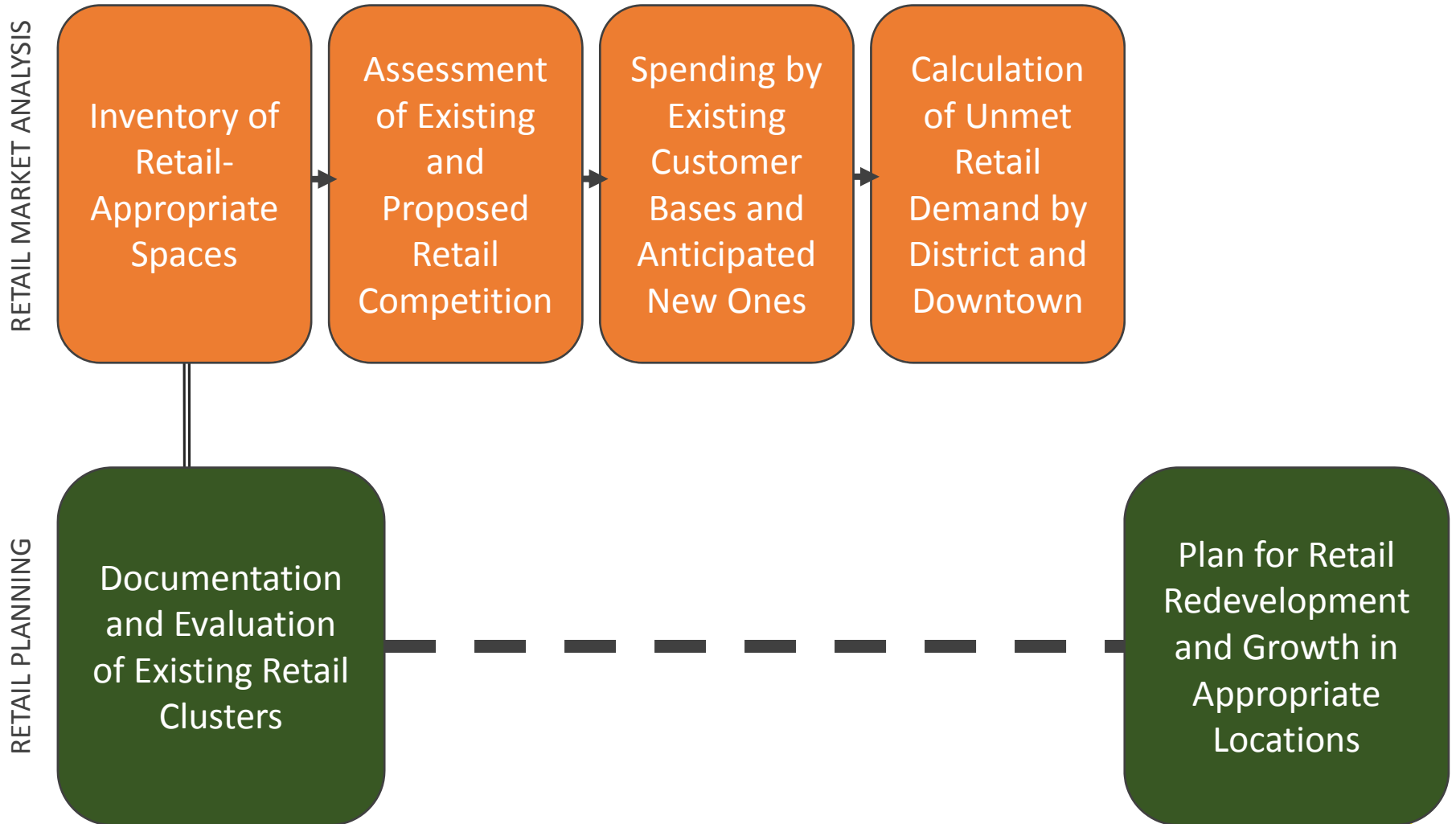


# DOWNTOWN BETHESDA PLAN

## RETAIL PLANNING STRATEGY

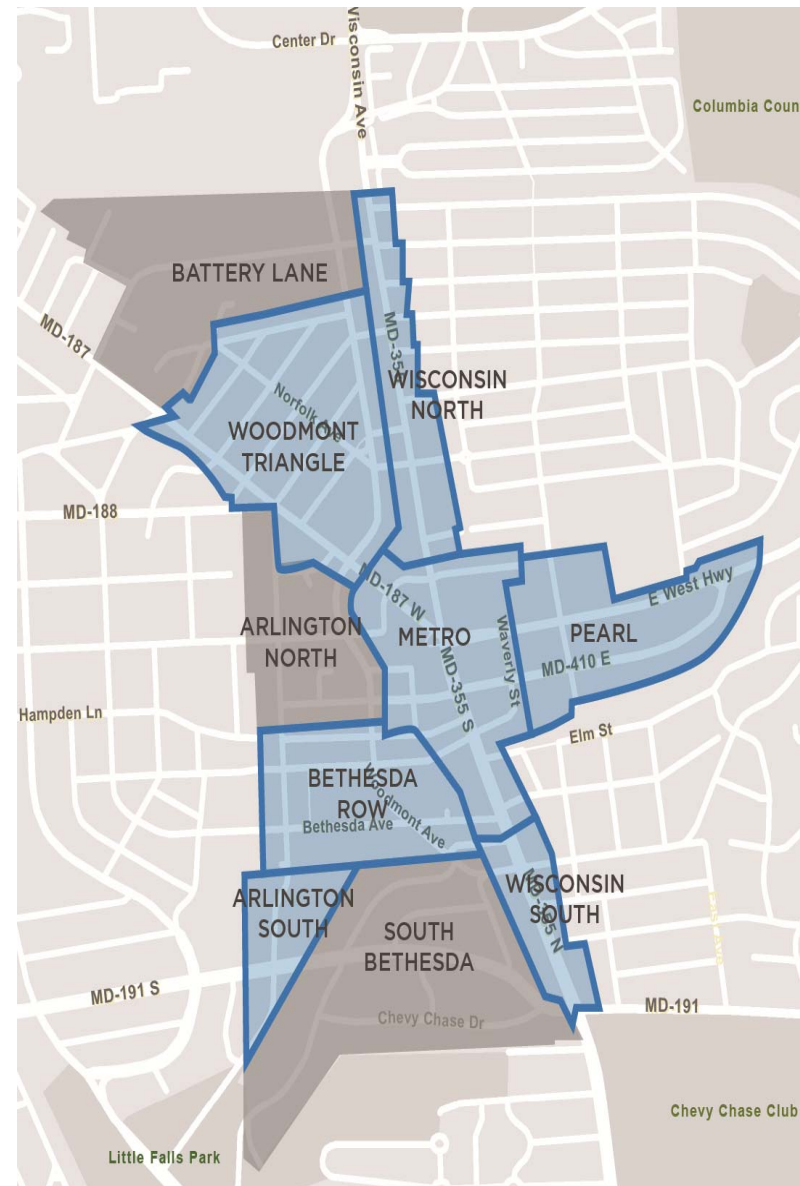


# STUDY METHODOLOGY



# DISTRICTS STUDIED

- ARLINGTON SOUTH
- BETHESDA ROW
- METRO
- PEARL DISTRICT
- WISCONSIN NORTH
- WISCONSIN SOUTH
- WOODMONT TRIANGLE



S.

# RETAIL BUSINESS ESSENTIALS

- Visibility (from an active street/sidewalk – busy, but not too busy)
- Visibility (into the store or restaurant)
- Accessibility
- Ceiling heights 12' or higher, bay width in 20-foot increments
- Necessary utilities/services for business type
- Adjacent businesses that attract similar types of customers
- Retail markets need a diversity of shopping and dining options
- Duplicating successful retail models in the same market causes cannibalism and systemic failure

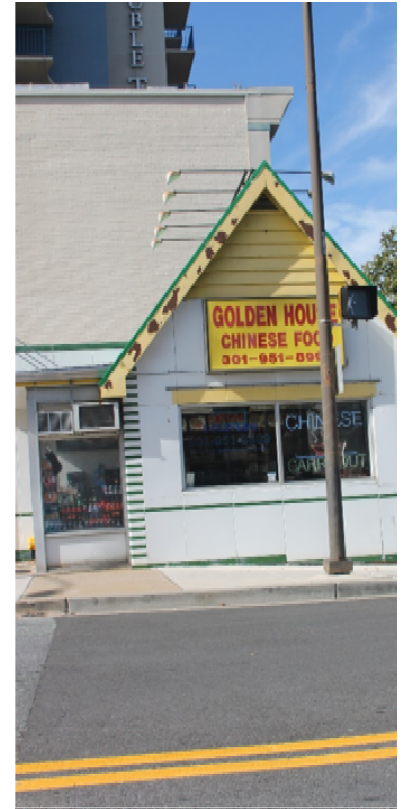
S.

# DOWNTOWN BETHESDA RETAIL OBSERVATIONS

- Traffic volumes and number of lanes are unavoidable obstacles to making Wisconsin Avenue into a retail “main street.”
- Old Georgetown Road has the same issue.
- Businesses in inferior retail spaces struggle.
- Interior and subterranean retail spaces dominant the Metro district.
- Residential-to-retail conversions hinder the Woodmont Triangle district.
- Bethesda Row’s success is tied to parking, spaces that meet modern retail requirements, moderate traffic levels, and concentration of restaurant tenants.

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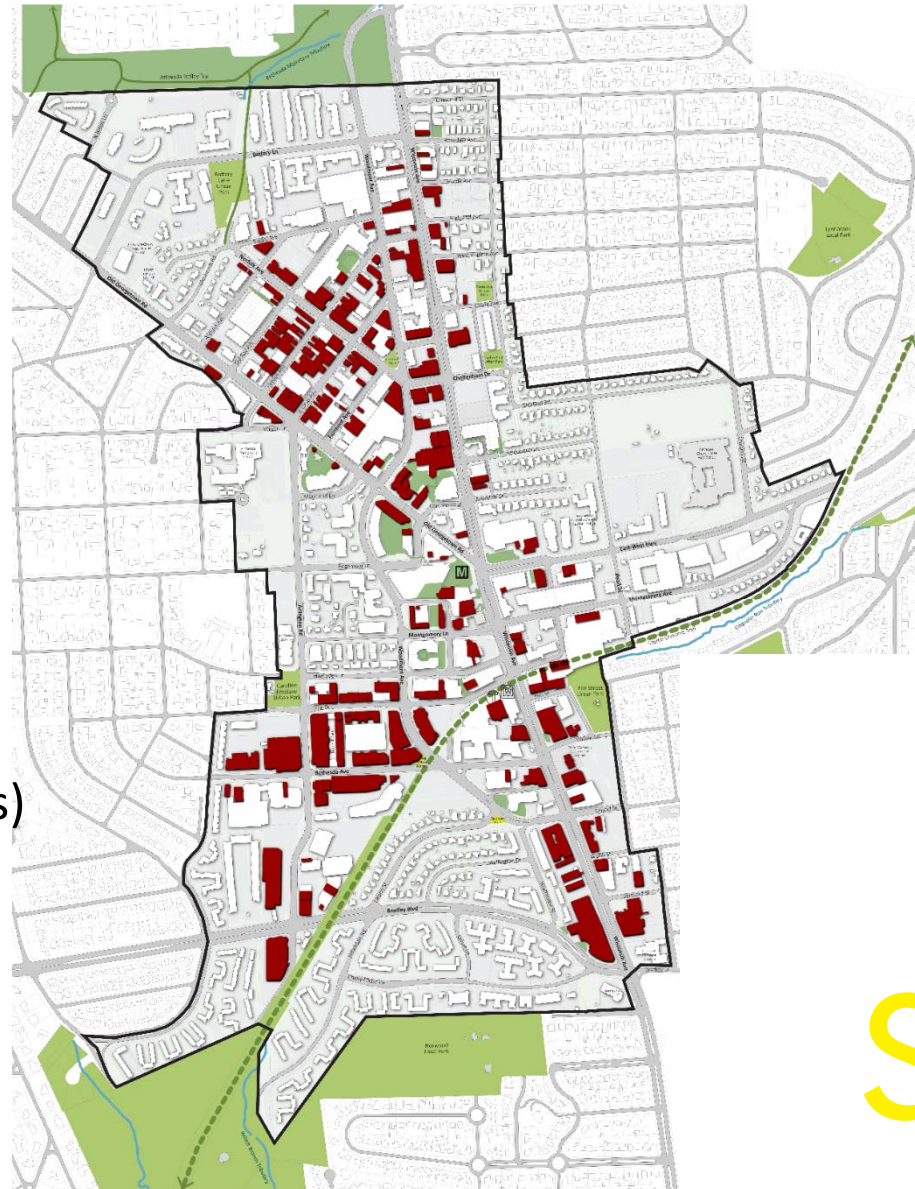
# OVERALL CONDITION OF RETAIL SUPPLY



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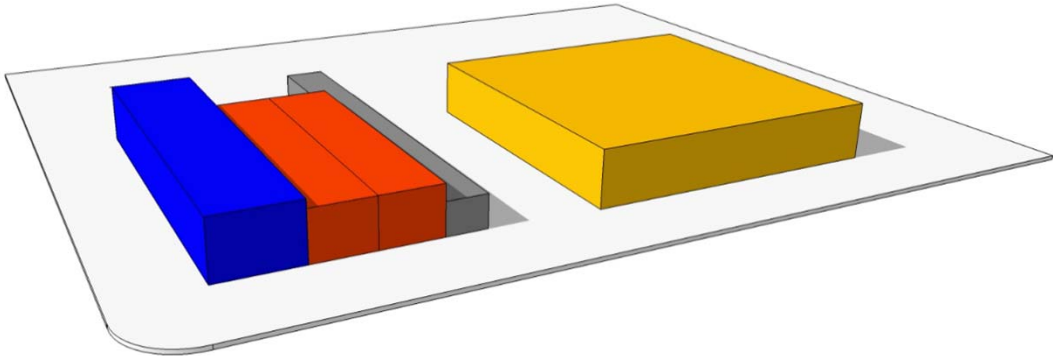
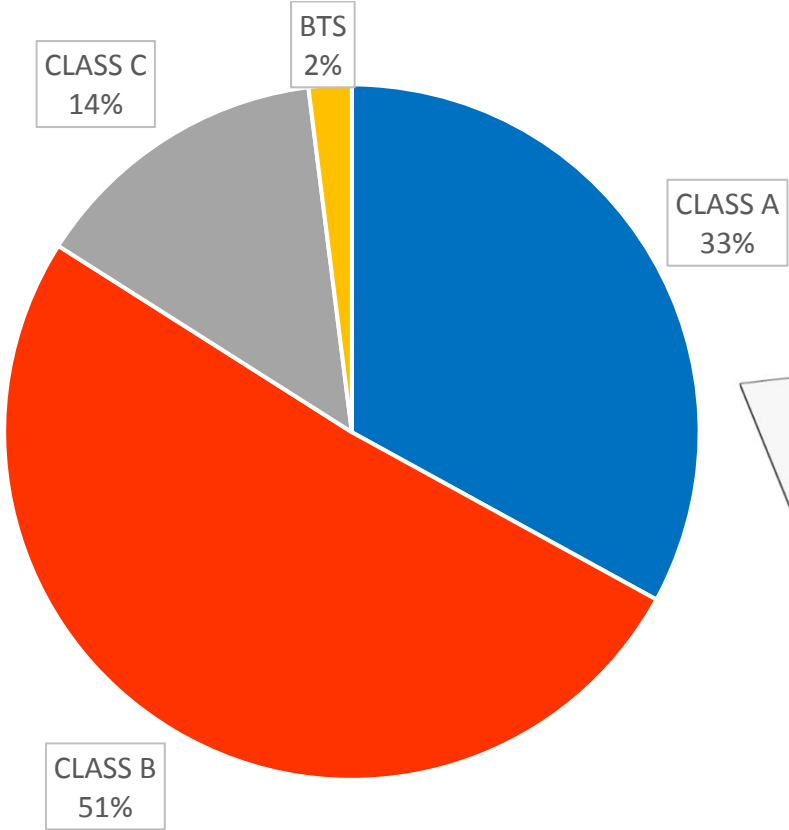
# EXISTING INVENTORY

- ARLINGTON SOUTH (18 retailers)
- BETHESDA ROW (106 retailers)
- METRO (62 retailers)
- PEARL DISTRICT (3 retailers)
- WISCONSIN NORTH (51 retailers)
- WISCONSIN SOUTH (18 retailers)
- WOODMONT TRIANGLE (161 retailers)



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# CLASS OF SPACE (BY # OF SPACES NOT TOTAL SF)

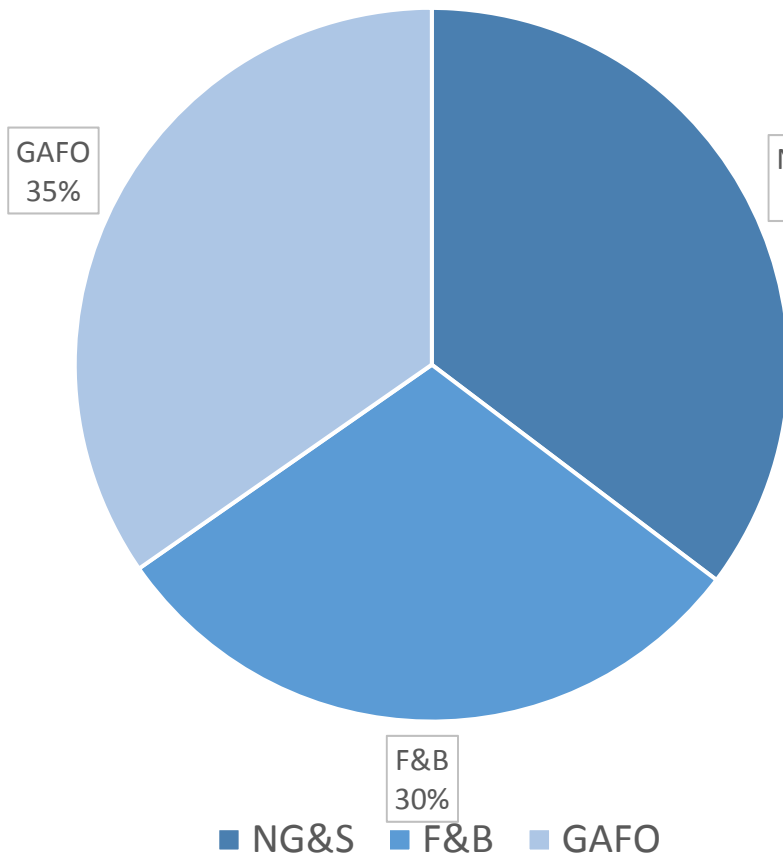


■ CLASS A ■ CLASS B ■ CLASS C ■ BTS

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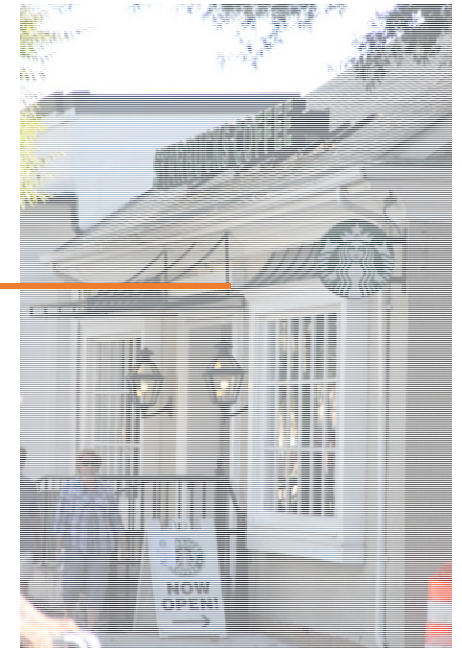
# RETAIL CATEGORY DISTRIBUTION



**NEIGHBORHOOD GOODS & SERVICES (NG&S)**

NG&S  
35%

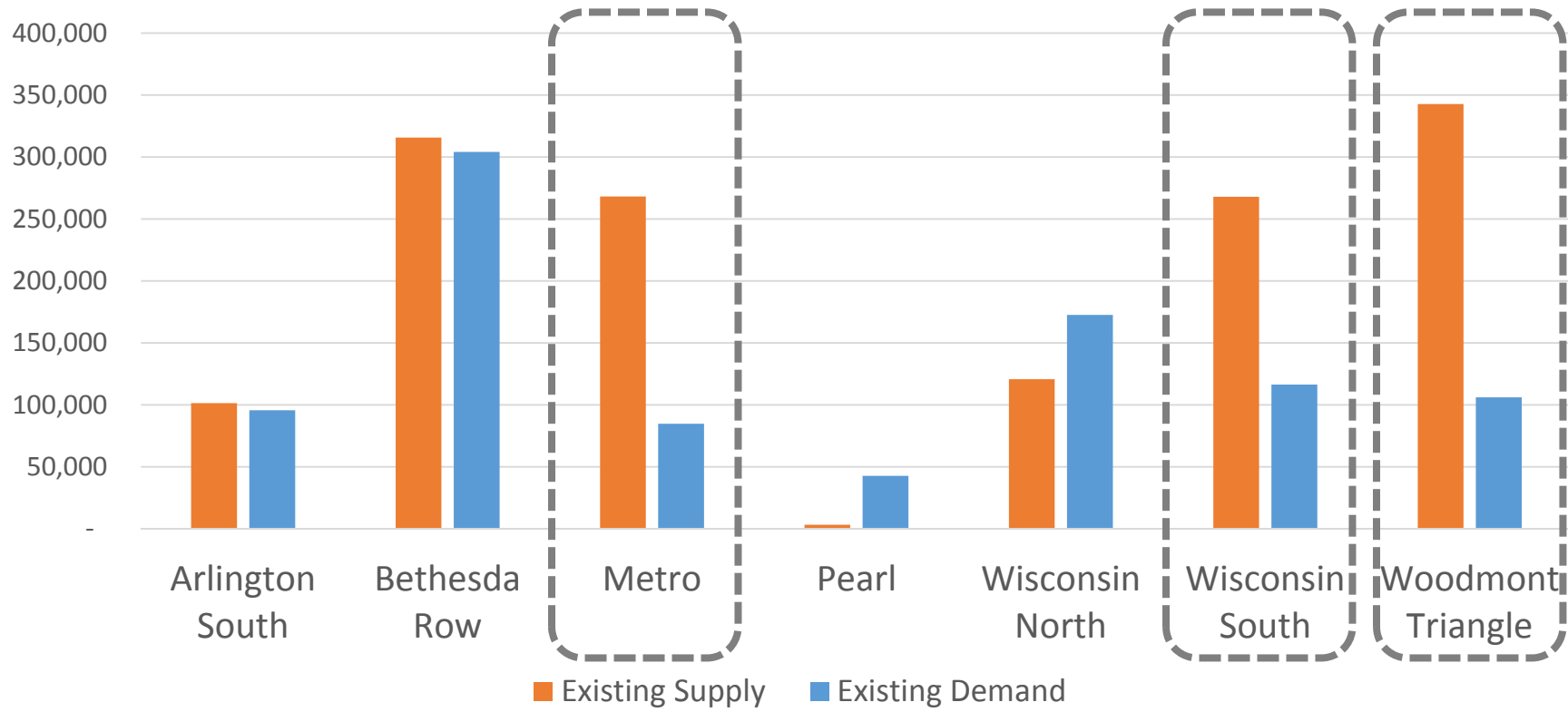
**FOOD & BEVERAGE (F&B)**



**GENERAL MERCHANDISE, APAREL, FURNISHINGS & OTHER (GAFO)**

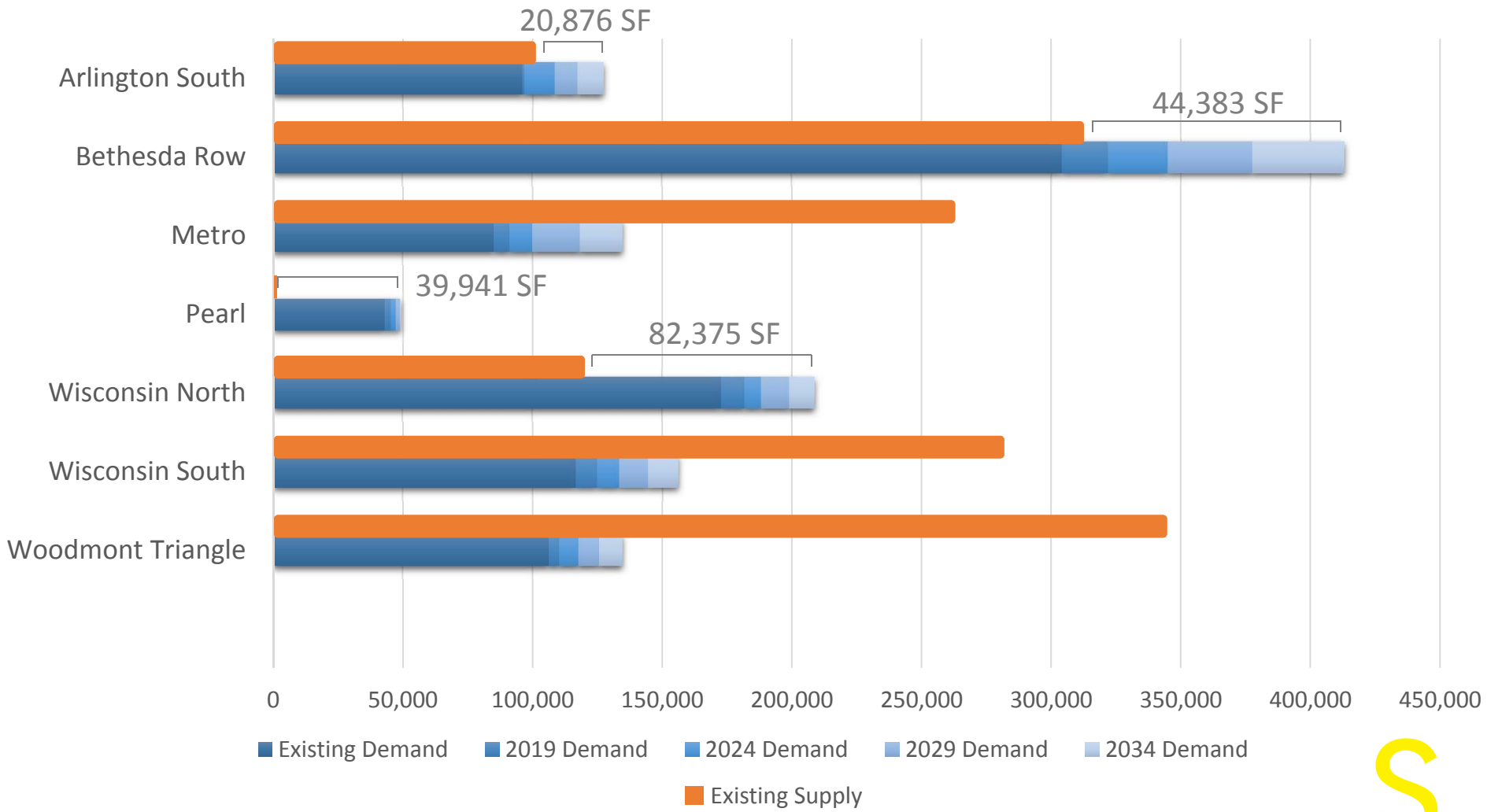
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# EXISTING SUPPLY VS. DEMAND

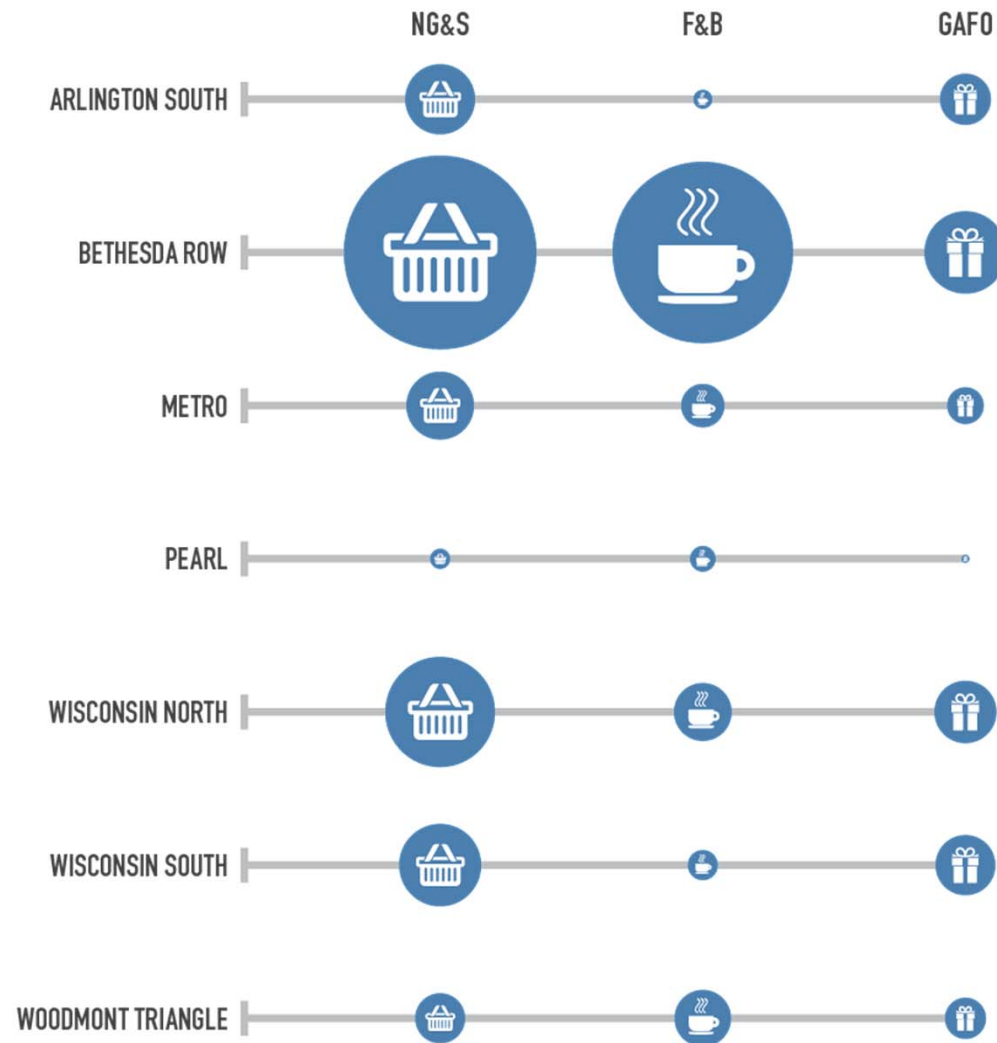


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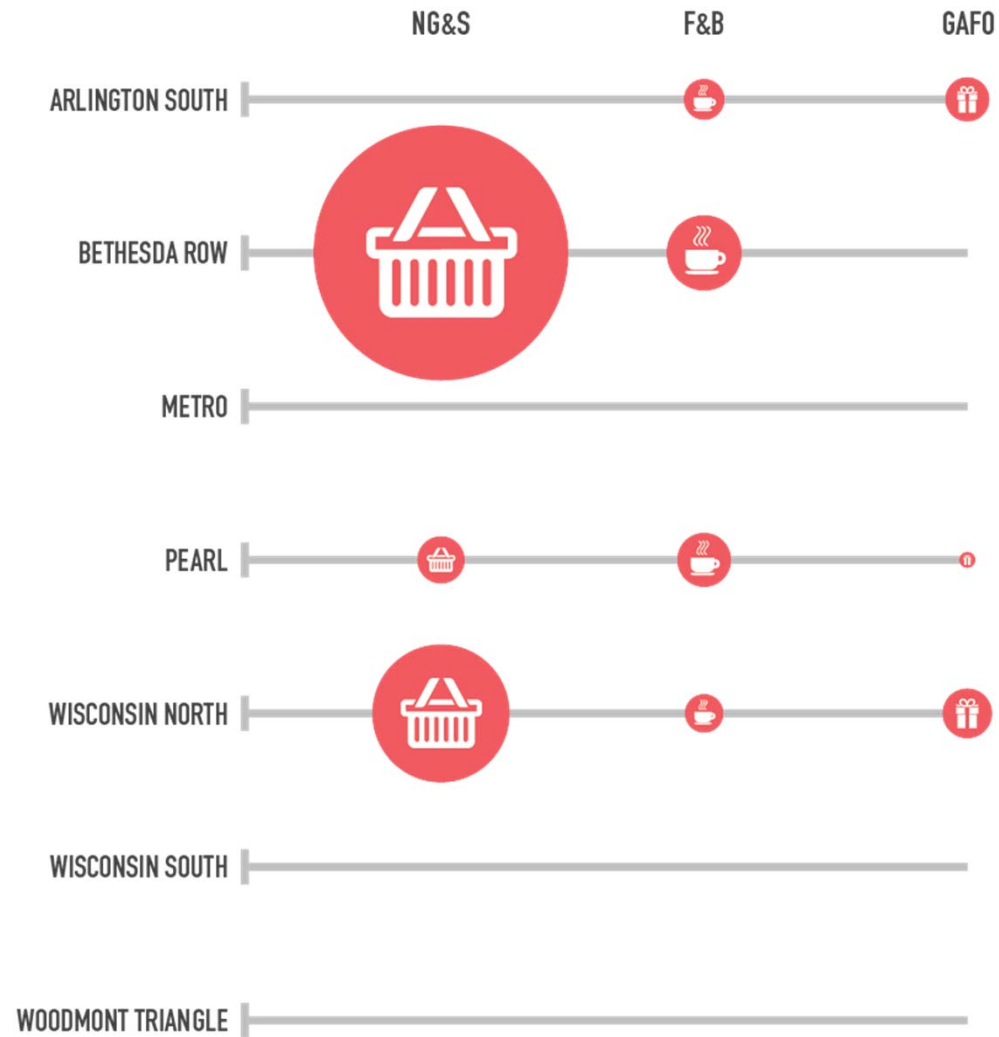
# DEMAND PROJECTIONS



# RETAIL DEMAND (2034) BY DISTRICT

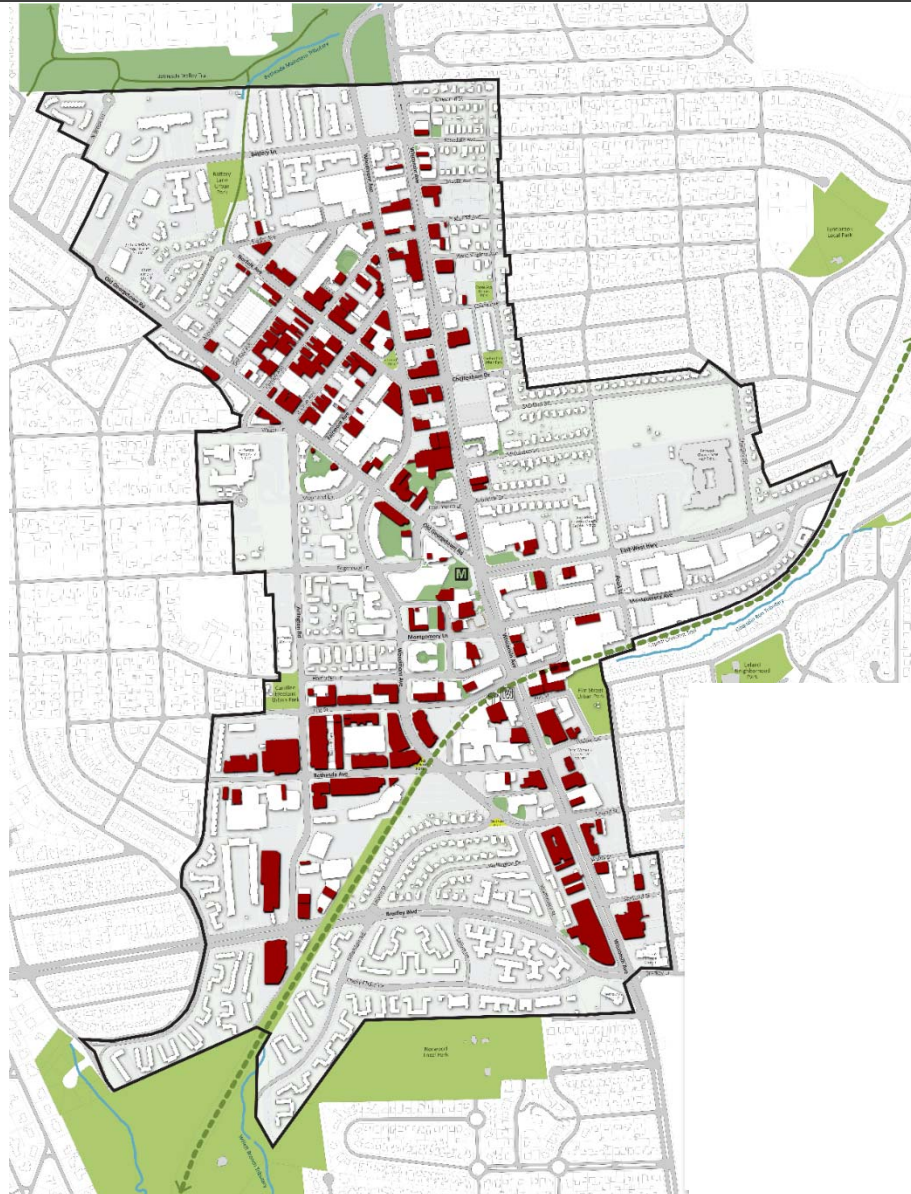


# UNMET RETAIL DEMAND (2034) BY DISTRICT



# WHAT'S HERE NOW?

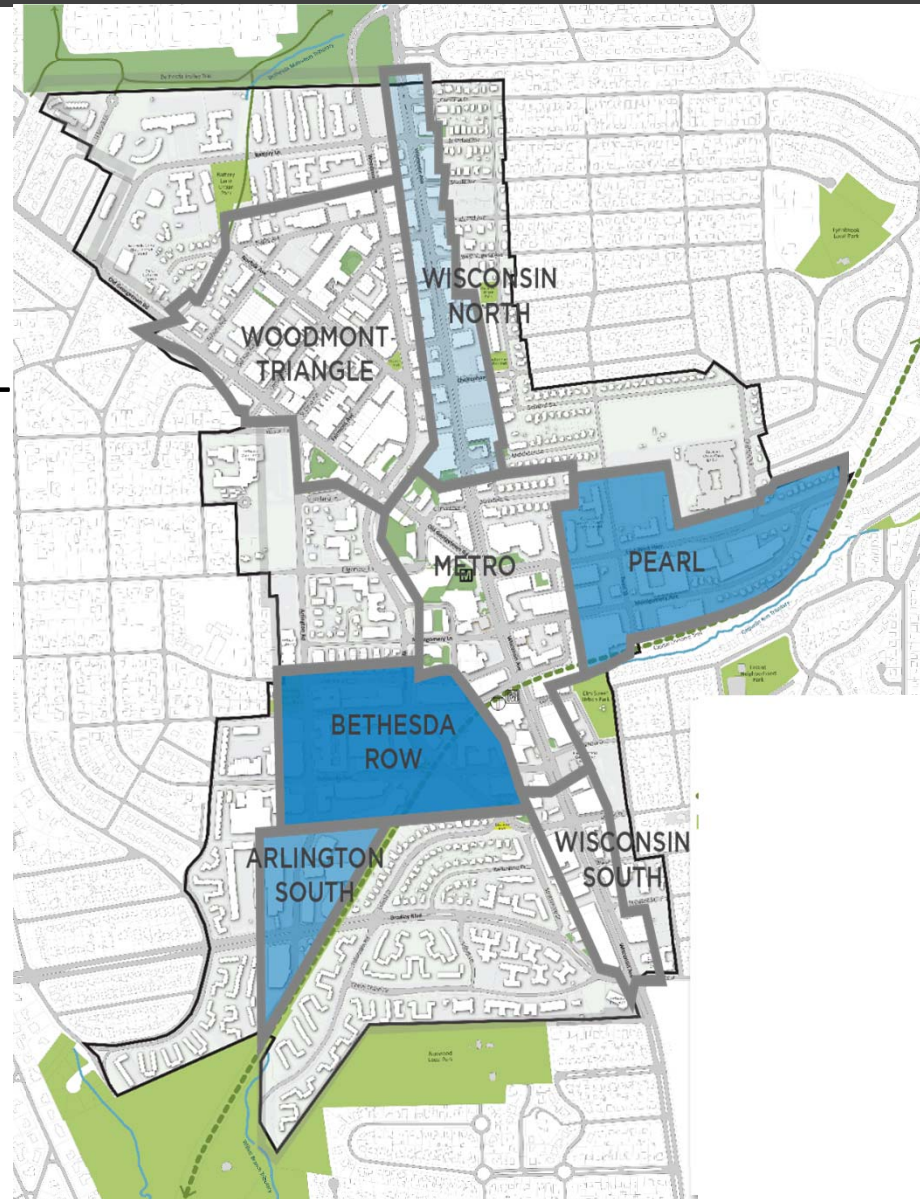
- ARLINGTON SOUTH (18 retailers)
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- WISCONSIN NORTH (51 retailers)
- WISCONSIN SOUTH (18 retailers)
- WOODMONT TRIANGLE (161 retailers)



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# NO ADDITIONAL SQ.FT. OF SUPPORTABLE RETAIL

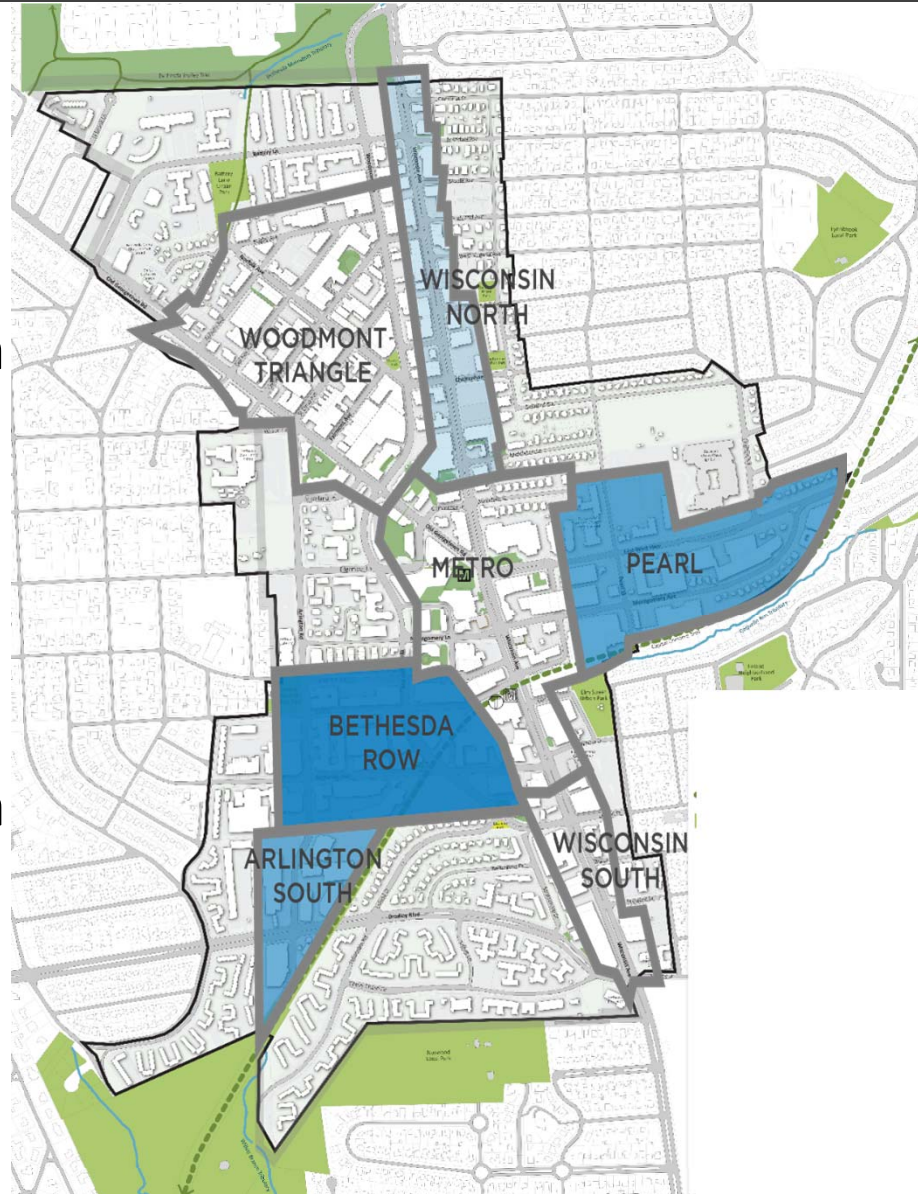
- **WOODMONT TRIANGLE:** concentration of Class A space supplemented by WT “funky” space
- **METRO:** Same amount of space – better quality, appropriate locations
- **WISCONSIN SOUTH:** Rethink what Wisconsin Avenue retail means. Smaller stores, possible niche market



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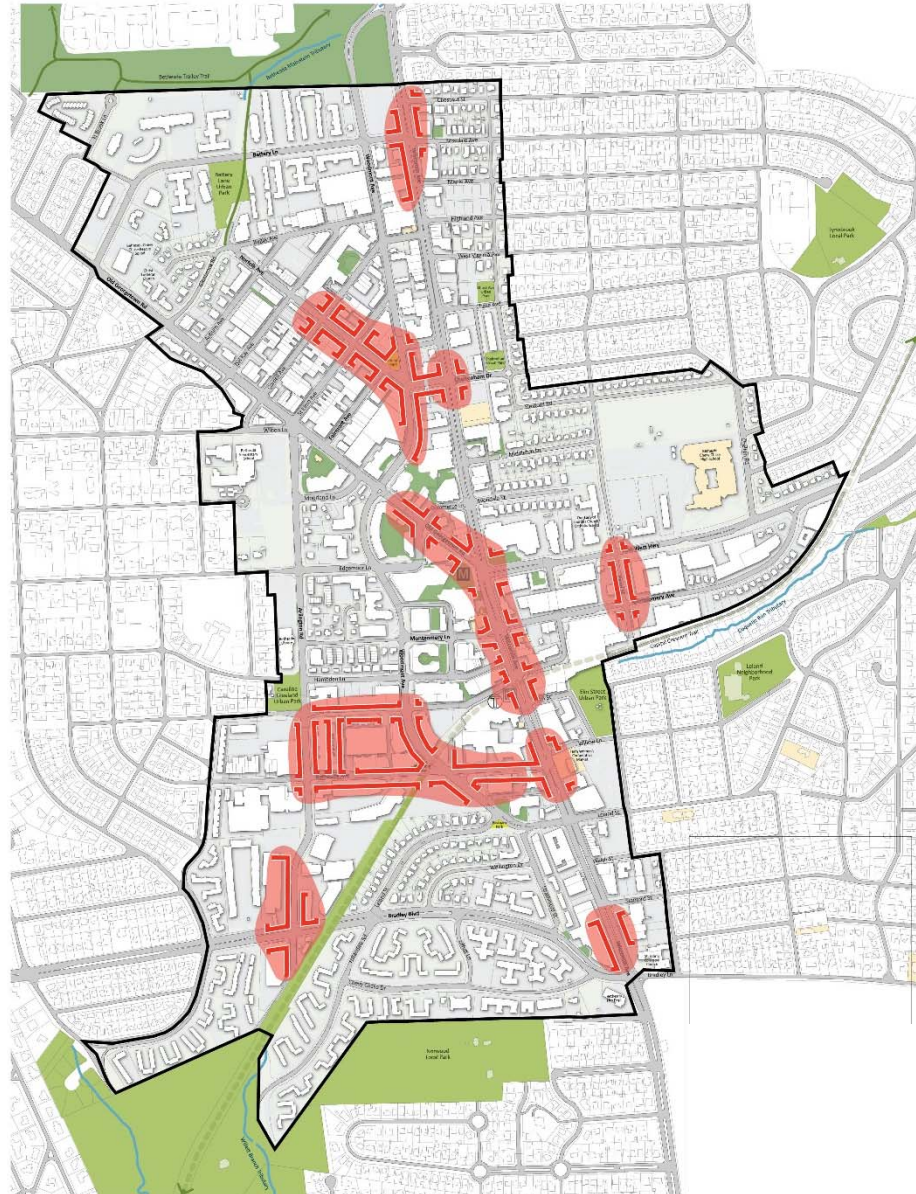
# ADDITIONAL SQ.FT. OF SUPPORTABLE RETAIL

- **WISCONSIN NORTH:** Retail space clustered at northern edge and “gateway” to WT
- **PEARL:** Retail for the workplace, focused in a walkable environment
- **BETHESDA ROW:** Build on what’s working
- **ARLINGTON SOUTH:** Urban collection of large-format tenants, vehicular-oriented





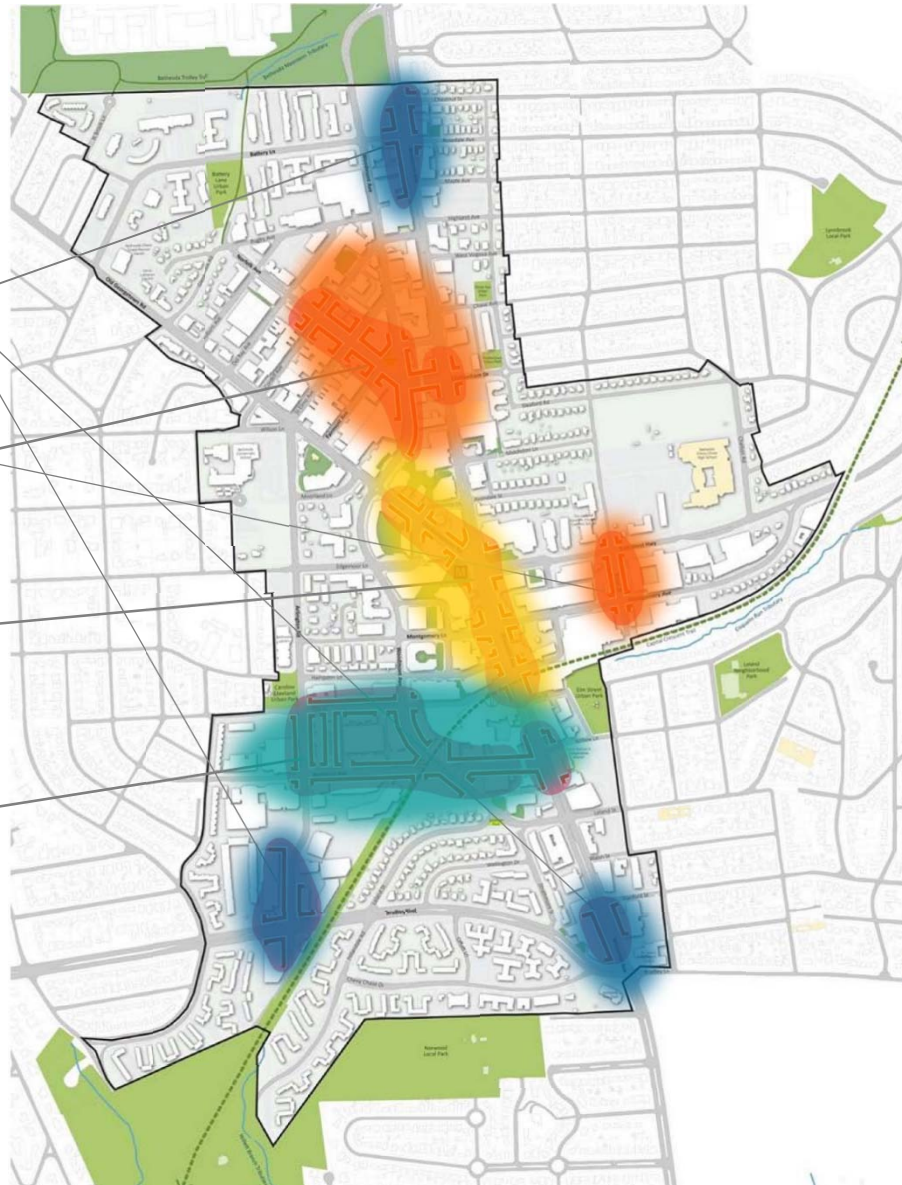
# PROJECTED RETAIL NODES



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# PROJECTED RETAIL NODES...FOR WHOM?

- GATEWAYS  
commuters/residents/employees
- NEIGHBORHOOD CTR  
residents/employees
- PHYSICAL CENTER  
commuters/employees
- REGIONAL CTR  
commuters/employees



S.

# DOWNTOWN BETHESDA PLAN

## RETAIL PLANNING STRATEGY

