



FOGGY BOTTOM WEST END NEIGHBORHOOD RETAIL DEVELOPMENT REPORT

*Building an Economically and Environmentally Sustainable
Neighborhood*

Prepared by
The Committee for Foggy Bottom West End Neighborhood Retail

Sponsored by
The Foggy Bottom Association

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Executive Summary

There is a growing residential community in Foggy Bottom West End available to support a variety of retailers. The population will continue to grow as properties are redeveloped as mixed-use buildings with residential units and retail spaces. Residents want and will support new retailers in the area.

The Committee for Foggy Bottom West End Neighborhood Retail was created in May 2009 by The Foggy Bottom Association, a non-profit 501(c)(3) organization, to create an economically sustainable neighborhood for existing and future retailers and the people who live and work in the area.

The mission for the Committee for Foggy Bottom West End Neighborhood Retail is to develop a long-term retail development plan for retailers of goods and services that:

1. Creates a retail environment which is sustainable and meets the community's needs and wants;
2. Influences DC government agencies and private developers in their selection of retail to fill space in their buildings;
3. Influences the selection of retailers going in to proposed and future redevelopment projects, including the Stevens School, the West End Library/Metropolitan Special Operations/DC Fire Station sites, the former George Washington University Hospital site, and the former Watergate Hotel; and
4. Markets retailers effectively within the neighborhood.

The Committee for Foggy Bottom West End Neighborhood Retail conducted a community-wide survey asking neighbors and the people who work in the area what retail goods and services were important to them. The survey was available on-line and in paper form between July and November, 2009. A public meeting of the Foggy Bottom West End community was held in November to share the results of the survey and to solicit additional input. The survey results indicated that the community wants and will support new retailers in the area, particularly:

- Groceries; full-service groceries as well as specialty shops (fruits, vegetable, seafood, meats, ethnic foods, prepared foods for carry-out)
- Mid-priced, casual, sit-down restaurants
- Health and fitness centers and yoga studios
- Personal services such as hair and nail salons, and spa services
- Specialty shops such as hardware and garden shops, book stores, sporting goods, pet supplies and gift shops

The Community wants a lively, energetic neighborhood with a variety of restaurants, stores and services nearby and within an easy walk from their homes. They also want retailers to have convenient hours so residents can shop in the evenings and

weekends. Foggy Bottom West End's growing population is ready and willing to support stores that give them the goods and services they want. A synergy between the residential and retail sectors in the community can create sustainability for the neighborhood and new and existing retailers. Residents can shop in their own neighborhood and not have to travel to other areas in the city for their day-to-day shopping needs. Residents will save time and transportation costs. Lively, vibrant retail areas in the community will enhance the viability of the area and attract new residents and businesses.

Overview

The Committee for Foggy Bottom West End Neighborhood Retail was named to specifically emphasize supporting neighborhood-oriented retailers - both existing and future. The goal of the Committee is influence decisions on the mix of retailers in the area to create a vibrant, lively neighborhood in which retailers serve the needs and wants of residents and in which residents support neighborhood stores with their shopping dollars.

Community Involvement

The members of the Committee for Foggy Bottom West End Neighborhood Retail are stakeholders and leaders in the neighborhood and represent a broad range of interests, from both residential and commercial perspectives. These individuals live and work in the community and are interested in making a positive contribution to the community's future. The Committee members include neighborhood leaders; one current and two former Foggy Bottom Association Board members and the President of the West End Library Friends. It also includes both long-time residents and residents who have moved into the community in the last two years. The Committee members include:

- 1 business owner
- 1 hotel executive
- 1 commercial and residential real estate broker
- 1 ANC Commissioner representing the West End
- 2 residents of the Watergate complex in Foggy Bottom
- 1 resident of the eastern area of Foggy Bottom
- 3 residents of the West End

The Committee reached out to residents and people who work in the area to gather input on the kinds of goods and services they wanted and which they would support financially. A community-wide survey was conducted between July and November, 2009. In order to reach a wide audience, the survey was publicized through email listservs and hard copy notices were distributed in residential buildings. The survey was advertised in the Foggy Bottom News insert in the Foggy Bottom Current newspaper; emails were sent to the Foggy Bottom Alert Yahoo group, to Foggy Bottom Association members, to members of the West End Library Friends group and to the West End Dogs group; the survey was publicized on the ANC 2A02's web site and announced at meetings of the Foggy Bottom Association, the ANC Commission and the West End Library Friends.

On November 3, 2009, a public meeting for the Foggy Bottom West End community was held at the West End Library to report the results of the survey to date and to solicit additional community input. The meeting was publicized through the same means used to publicize the survey. Fifty-two members of the community and representatives of the local press attended and participated in this session.

A total of 253 surveys were collected. During December, the data was compiled and analyzed with this final report produced in January 2010.

Economic Support and Environmental Sustainability

The Foggy Bottom West End community has many options for shopping, from neighborhood retailers to retailers in other DC neighborhoods (such as Georgetown and Dupont Circle) to regional shopping centers (Tyson's Corner, Pentagon City, etc.) The goal of the Committee for Foggy Bottom West End Neighborhood Retail is to support and attract goods and service retailers which meet the day-to-day needs and wants of the neighborhood. A "virtuous cycle" of residents shopping locally and supporting neighborhood retailers will enhance the attractiveness of the neighborhood for both new residents and businesses.

Existing Conditions

Current Vacancies

- Large spaces in the Watergate buildings on Virginia, NW
- Small spaces in multiple other buildings in Foggy Bottom West End
- Details on available spaces can be found at the Washington, DC Economic Partnership website, www.wdcep.com

The Committee researched sources of information on vacant retail spaces in DC in general and Foggy Bottom West End in particular. The Committee researched public agencies, non-profit organizations and private firms. Several large commercial real estate leasing firms have their own proprietary information which the Committee could not obtain. In January 2010, the Washington, DC Economic Partnership launched a new web-based Retail Space Search tool through which one can search for vacant space in existing buildings by location, square footage, proximity to a Metrorail station and when the space is available. One can also search by selected DC neighborhoods—but not Foggy Bottom West End. A January 2010 search found retail spaces available in ten buildings within the study area. The Partnership also has a Development Search tool where users can find retail spaces in recent, planned or proposed redevelopment properties and renovation projects. One can search for these redevelopment and renovation projects by DC wards, zip code, key word and other parameters.

Under Construction

- Former George Washington University Hospital site on south side of Washington Circle

Redevelopment Sites

- Former Stevens School site on 21st St., NW between K and L Streets
- West End Library-Metropolitan Police Department Special Operations site on L St., NW between 23rd and 24th Streets
- DC Fire Station site on M St., NW at 23rd St.

Retail Competition

The Committee looked at nearby neighborhoods to determine what retail corresponded with the needs and wants of the Foggy Bottom West End survey respondents. Three neighborhoods most frequently named in the survey as alternative shopping areas, Dupont Circle, Georgetown and Friendship Heights, were reviewed. Tenleytown was also reviewed because of its proximity to Friendship Heights.

The **Dupont Circle** area has many stores with goods and services mentioned by survey respondents, especially in the food arena with a variety of grocery offerings, casual dining, carry-out food, and wine and liquor. Specialty stores and services that include pet stores, health clubs, yoga studios, nail salons, and hardware stores are also available.

Similarly **Georgetown** has many stores with goods and services mentioned by survey respondents: grocery and specialty groceries; mid-priced casual restaurants and food

vendors; services like healthy clubs, yoga, hair and nail salons and a wide variety of specialty retailers including bookstores, movies, pet stores, furniture and antique stores.

Lastly, **Tenleytown** and **Friendship Heights** also have many similar retailers plus they have some stores that are not in Dupont Circle or Georgetown. These stores are unique to Tenleytown and Friendship Heights include specific name brand men's and women's clothing stores, jewelry stores and electronic and computer retailers.

Both Dupont Circle and Georgetown are adjacent to our study area and within a comfortable walk from parts of Foggy Bottom West End. However, they are not within an easy walk of all areas of Foggy Bottom West End. In many locations, the walk to the Dupont and Georgetown neighborhoods is more than a mile in distance and would take more than 25 minutes.

Washington Metropolitan Area Transit Authority (WMATA) maps in Metro stations show $\frac{3}{4}$ mile concentric circles around subway stations. Three-fourths of a mile is a common maximum range beyond which an average walker will not take transit. Thus, for many Foggy Bottom West End residents, the retailers in Dupont Circle and Georgetown are not within an easy walk and do not meet their needs.

In contrast to Dupont Circle and Georgetown, Tenleytown and Friendship Heights are not within walking distance of Foggy Bottom West End, yet residents said they shop in these neighborhoods. These areas are readily accessible by car, bus and Metrorail.

With many of the stores and services available in close by neighborhoods, the Foggy Bottom West End community clearly indicated they want many of the same day-to-day goods and services available in their neighborhood.

Interestingly, only a few residents said they shopped in the Golden Triangle or downtown areas, even though the Golden Triangle is immediately east of study area and within walking distance of much of Foggy Bottom West End. The responses are likely due to either of two reasons. First, the survey asked in which other "neighborhoods" residents shopped. Residents may not consider Golden Triangle or downtown to be "neighborhoods." Second, they may not shop much in those areas for the day-to-day goods and services they need. Either way, residents said they do not shop much in these areas.

Summary of Survey Findings

First and foremost this high density neighborhood of urban dwellers wants **groceries**....specifically a full-line grocery with offerings of baked goods, fresh produce, fresh seafood and meats, prepared foods and deli foods. Between July and December 2009, the Committee for Foggy Bottom West End Neighborhood Retail assessed the needs and wants of neighborhood residents, workers and students via surveys, discussion groups and open forum meetings. The response has been clear and consistent. A full-line grocery store offering was the number one request through all segments of the community population.

Specific full-service grocery store companies were repeatedly mentioned when asked what was missing in their neighborhood. Whole Foods Market, Giant Foods, Harris Teeter, and Safeway were requested most often and in this preference order. The same grocery stores, in the same order were also listed when neighbors were asked what would complement the existing retail and service offering of the neighborhood.

Secondly was the request for **restaurants and cafes** offering mid-price fare in a casual atmosphere. Outdoor cafés, ice cream and yogurt shops, and delis were also repeatedly mentioned in the survey. The broad range and types of restaurants, cafes and eateries requested indicate that respondents want and will use these types of food services. Even with the many diversified restaurant offerings in nearby areas, the Foggy Bottom West End community wants the convenience of its own neighborhood food offerings and eateries in an affordable price range.

With the wish for their community to become independent and sustainable, neighbors listed specific **service and retail needs** that were important to enhancing the livability of the Foggy Bottom West End area. Health and fitness centers, hair and nail salons, hardware and garden shops, book stores, sporting goods, pet store supplies and gift shops were most often mentioned as high wants.

The residents, workers and students in this community do not want, nor do they expect big box retailers in their neighborhood. They shop Target, Costco, Wal-Mart, but they did not request these types of stores for their community. The same attitude holds true for department stores and other apparel stores. The residents of the Foggy Bottom West End neighborhood are accustomed to shopping in other areas of the city for these types of retail goods. Neither the big box retailers nor department stores are essential for the Foggy Bottom West End community.

What is important to this community is **convenience**--having the goods and services they want and need available and nearby, within a 10-15 minute walk. These goods and services meet their daily needs and provide a livable self-contained environment. The residents, the people who work in the area, and the students who attend the nearby universities are clear about their wish for street-friendly merchants with engaging streetscape presence.

Details results from the survey can be found in Attachment 5.

Attachments

Attachment 1

Committee for Foggy Bottom West End Neighborhood Retail

Members:

Greg Snyder, Chair

Diana Bulger

Rebecca Coder

Neil Conway

Elizabeth Elliott

Susan Haight

Gayley Knight

Jackie Lemire

Matt McCormick

MaryKay Shaw

Cathy Case

Representing:

The Foggy Bottom Association
West End Resident

Fairmont Hotel
West End Business

ANC Commissioner for 2A02
West End Resident

District Hardware
West End Business

Foggy Bottom Resident

West End Library Friends
West End Resident

Watergate Resident

West End Resident

Residential and Commercial
Real Estate
West End Resident

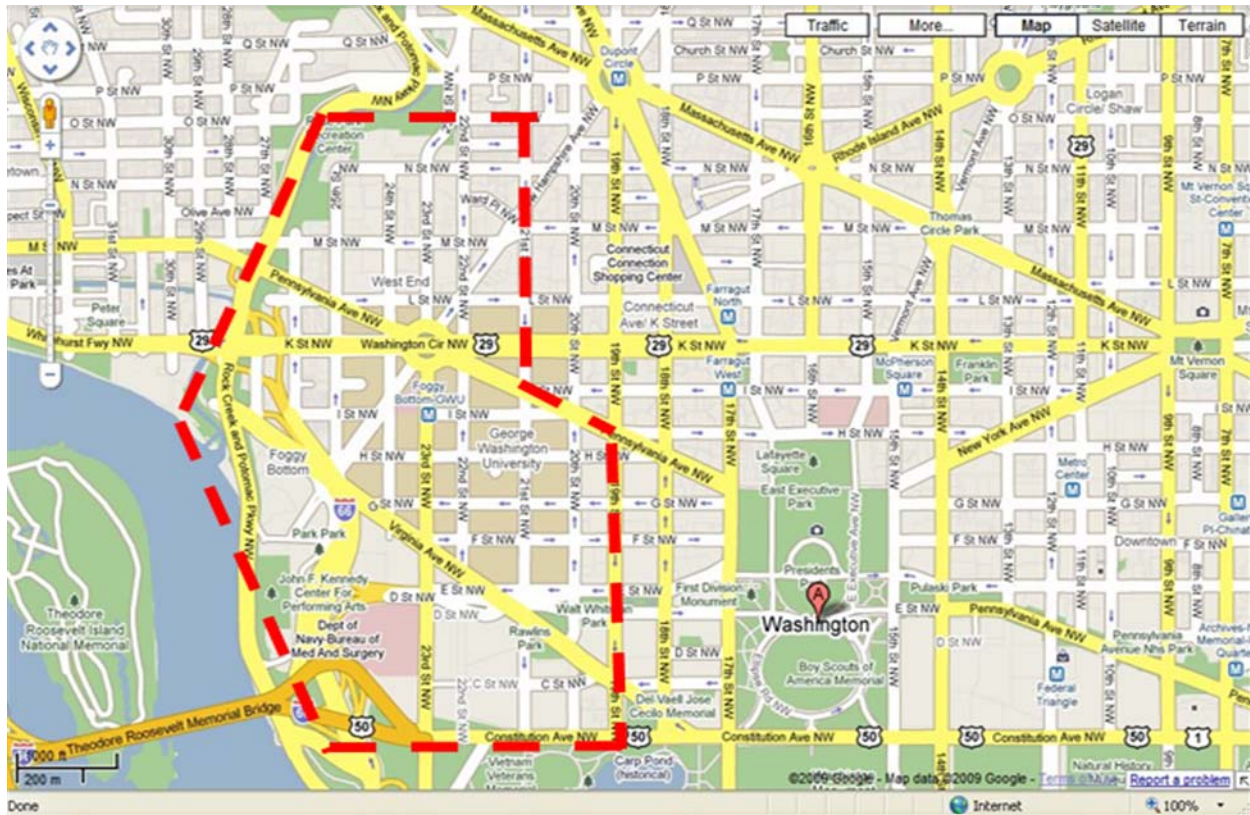
Watergate Resident

Committee Consultant/Facilitator

Attachment 2

Foggy Bottom West End Retail Study Parameters

Note: The Committee's Study Parameters roughly correspond to the boundaries of Cluster 5 (West End, Foggy Bottom, GWU) used by the D.C. Office of Planning.



Attachment 3

Foggy Bottom West End Demographic Information

Survey Respondent Demographics

- 87% Residents
- 13% Non-Residents (Office Workers, Students, Business Owners, Hotel Guests)
- Household make-up:
 - 55% two person Household
 - 31% single person Household
 - 10% four person Household
 - 3% three person Household
- 94% no children under 16 in Household

Foggy Bottom West End Neighborhood Demographics

The Committee attempted to obtain recent demographic information on Foggy Bottom West End. Information was available from the U.S. Census Bureau down to the census tract level, but that information was based on 2000 Census. In 2009, the U.S. Census Bureau reported that it estimated that the population of the District of Columbia has grown to nearly 600,000¹. The Census Bureau does not break down its 2009 estimates by any unit smaller than states (or DC) so the Committee was unable to obtain detailed population or demographic information for the Foggy Bottom West End area. The Committee was not successful getting more current information from other sources. However, during the last few years many new condominium and rental residential buildings—many having 100, 200 or more units—have been built in the area increasing the residential population of the area.

¹ "[Annual Estimates of the Resident Population for the United States, Regions, States, and Puerto Rico: April 1, 2000 to July 1, 2009](http://www.census.gov/popest/states/tables/NST-EST2009-01.xls)". United States Census Bureau. 2009-12-22. <http://www.census.gov/popest/states/tables/NST-EST2009-01.xls>. Retrieved 01-15-2010.

Attachment 4

Foggy Bottom West End Retail Survey

The Foggy Bottom Association needs you! Your input is important to help guide the development of retail goods and service offerings in the Foggy Bottom and West End neighborhood. Please take a few minutes to answer these survey questions. The entire survey shouldn't take more than 15 minutes of your time and your answers are completely anonymous. We would like to have your survey responses by Friday, November 13, 2009. You have two options to complete the survey. You can complete the survey on line at <http://tinyurl.com/lxvx3m> or complete the written form below and return to the Foggy Bottom Association "in-box" at the West End Library located by the check-out desk. Either way, we want to hear from you.

Thank you in advance for your help.

FOGGY BOTTOM WEST END RETAIL SURVEY

1. What is missing for you in the way of shopping and services within walking distance of your home or place of business in the Foggy Bottom/West End neighborhood? List either a specific name of a retailer/service or general category of store/service. Rank your choices beginning with what you miss.

2. What service or retailer would complement what presently exists in the Foggy Bottom/West End neighborhood? List either a specific name or a retailer/service or general category of store/service. Rank your choices from most important to least important.

3. Is there an existing neighborhood in the DC Metro area that meets your shopping and service needs as it presently exists today?
 - Yes
 - No
4. Please name the neighborhood, if you answered YES.

5. If you answered YES, list the retail/service that this particular neighborhood provides that meets your shopping and service needs.

6. What store or service takes you out of the Foggy Bottom/West End neighborhood to find?

7. What does the term “street friendly merchant” mean to you?

- Store has goods and merchandise displayed on the sidewalk
- Offers product samples to people walking by
- Hands out coupons to people who pass the store
- Has sidewalk sales
- Has inviting window displays
- Have information boards or signs on sidewalks listing specials, events, etc.
- Has attractive curbside plantings and landscaping
- Entrance is easy to find, attractive and inviting
- Other, please list

8. Please give an example of the best “street friendly merchant” that you have either seen or experienced.

9. Are there too many of one type of stores/services in the Foggy Bottom/West End neighborhood?

- Yes
- No

10. If you answered YES to the question above (#9), please list those stores/services.

11. Please tell us a little bit about yourself.

Address

Zip Code

12. If not a resident, please let us know which of the following selections best describes your involvement in the Foggy Bottom/West End neighborhood.
- Business Owner
 - Hotel Guest
 - Office Worker
 - Student
 - Other
-
13. If you are a resident, how many people live in your household?
- One
 - Two
 - Three
 - Four +
14. If you represent a residential household, are there children under the age of 16 residing in your home?
- Yes
 - No

Thank you!

Upon completion, please return to the Foggy Bottom "in-Box" at the West End Library next to the book checkout counter.

Attachment 5

Foggy Bottom West End Retail Survey – Detailed Results

Conducted between July 17 and November 15, 2009

253 total respondents

The Foggy Bottom West End Neighborhood Retail Survey Questionnaire was designed to determine the retail and service wants and needs of residents, workers, business owners and students who frequent the Foggy Bottom West End neighborhood. Open-ended or unaided questions were designed to elicit top of mind responses to specific retail and service needs and wants within walking distance of their homes or places of business. This same question format was used to understand what other metro areas were shopped for specific retail and services needs. Other multiple choice questions focused on street-friendly aspects that would impact the neighborhood streetscape.

The questionnaire was available both on-line and paper form via multiple methods of distribution listed below:

ANC Website	ANC Constituent List
Fairmont Hotel Employees	Columbia Residence
Foggy Bottom Alert Yahoo Group	Potomac Plaza
Foggy Bottom Association Members	Ritz-Carlton Residences
West End Library Friends	Watergate buildings
West End Dogs Yahoo Group	Westbridge
Columbia Plaza	York Apts
Empire Apts.	Jefferson House
The Statesman Apts.	Letterman House Apts
West End Flats (formerly Tiverton Apts.)	Potomac Park Apts.

The largest group of respondents was Foggy Bottom West End residents at 87% of the total. These residents live in the 20037 and 20006 zip code areas. Non-resident respondents at 13% brought office workers, students, business owners and hotel guests into the discussion.

The two largest groups of residents live in either two person households at 55% or single person households at 31%. Ninety-four percent (94%) of the residents do not have children under 16 living at home.

When asked in an open-ended, unaided question of what is missing in the way of shopping and service needs within walking distance of their home or place of business, the grocery category was clearly the single most often mentioned need from over 92% of the respondents. More than half of the grocery responses actually used the words “full line” grocery or named specific full-line grocery stores.

The second most common retail or service missing related to a variety of restaurants and food venues. A variety of restaurants and cafe responses were listed by 33% of the respondents. The greatest focus pointed to the need for a variety of mid-price casual eateries. Outdoor cafés, coffee shops and a wide range of ethnic offerings also were repeatedly mentioned.

Following restaurants, a broad range of services represented 30% of the respondents' needs. The services most often mentioned were hardware, pet supplies/care and hair and nail salons. Health clubs and gyms were also mentioned several times.

Multiple retail offerings registered 20% on the "what's missing list" with respondents. These other retail offerings included big box retailers, furniture, home accessories, gifts, book stores, sporting goods and kitchen accessories.

Apparel registered at 16% of the total respondents' requests. Apparel included general clothing, men's, women's and children's clothing along with accessories, jewelry and shoes. Department stores were also included in this category.

This priority listing was also repeated with responses to the question of what would complement the retail and service offerings that presently exist in the neighborhood. Grocery was most often mentioned by 86% of respondents, followed by restaurants at 34%, services at 27%, other retail at 21% and apparel at 13%.

Groceries remained at the top of the list when reviewing the overall number of responses from each of the following two questions:

1. What is missing for you in the way of shopping and services within walking distance of your home or place of business in the Foggy Bottom West End neighborhood?
2. What service or retailer would complement what presently exists in the Foggy Bottom West End neighborhood?

The 253 respondents generated 668 responses to what was missing within walking distance in the Foggy Bottom West End neighborhood. The same respondents generated 630 responses to the question of what would complement the existing retail and service offerings in the neighborhood. The order of importance for needs and wants remained the same from this analytical perspective of what was missing with grocery at 36%, restaurants at 33%, services at 30% and other retail at 20% and apparel at 16%. When asked what would complement the area, the responses followed: grocery at 35%, restaurants at 24%, services at 19% and other retail at 13% and apparel at 7%.

When survey respondents were asked if there were another existing neighborhood in the DC Metro area that met their shopping service needs, 57% of the respondents replied in the affirmative. For those that answered "yes", a follow-up question asked the respondent to name the specific neighborhood. There was no conclusive leader on the 25 alternative shopping area listing. The most often mentioned locations were the neighboring communities of Georgetown and Dupont Circle. Trailing behind were the neighborhoods of Friendship Heights, Bethesda, Cleveland Park, Chevy Chase and Clarendon. From the variety of locations, it appears that people are used to shopping in a variety of locations for specific goods as the follow-up question reflects. The most often mentioned shopping and service needs that drew them to these other locations included groceries, restaurants and clothing. These responses were similar to the question of what store or services took the respondents out of the Foggy Bottom West End neighborhood. Groceries were still high on the list, but following close was apparel, department stores and warehouse offerings.

Two questions were included in the survey relating to “street-friendly” merchants. These questions were designed to better understand the community’s thoughts on merchandising of the neighborhood’s sidewalks and streets. The respondents were given a list of options to indicate what was most important to them. The top choices by respondents included:

- 1) having an entrance that is easy to find – attractive and inviting;
- 2) inviting store windows;
- 3) attractive curbside plantings and landscaping;
- 4) information boards and signs that list specials or events.

Less than half of the respondents answered the follow-up question asking for recall of the “best street-friendly merchant” they had either seen or experienced. Whole Foods Market, Trader Joe’s and Anthropologie were the most often mentioned retailers. Bethesda Row, Shops at Clarendon and Old Town Alexandria were shopping areas most often mentioned.

To clarify the perception of the present retail and service component of the Foggy Bottom West End community, respondents were asked if there were too many of the same type of merchants or services in the neighborhood. The majority response was 64% “no”. Those respondents that responded “yes” were asked to name those stores or services, they felt were duplications. Drug stores (CVS, specifically), coffee shops (Starbucks, specifically), banks, dry cleaners, chain stores and either low end bars and eateries or high end restaurants were at the top of the list.

An abbreviated listing of merchants and services by category is listed below. A complete listing with correspondent responses is available upon request.

Grocery references included:

- Full line grocery
- Bakery/Pastry/bread
- Fish/Seafood/Meat
- Fruit/vegetables
- Specialty Gourmet, i.e., Dean & DeLuca, Balducci, etc.
- Ethnic markets, i.e., Italian, Asian, Greek, Oriental
- Specific Grocery Stores, i.e., Whole Foods Market, Harris Teeter, Giant Foods, Safeway, Wegmans, Superfresh
- Specific Food Merchants, i.e., Marvelous Market, Rodman’s, multiple deli merchants

Restaurant references included the following responses:

- More/greater variety/selection of restaurants, cafes and eateries
- Ethnic restaurants and specific cuisine offerings, i.e. sushi, Vietnamese, Mongolian, Middle Eastern, French, Mexican
- Specific mentions of low, mid and high price restaurant providers
- Casual dining
- Neighborhood bars and restaurants
- Breakfast, lunch and late night food purveyors
- Fast Food choices

- Carry –out
- Outdoor Cafes
- Specific restaurant selections, i.e., Chadwicks, Pizza Paradiso, Farmers Inn, Asia Nora, P.F. Chang’s China Bistro, Alero, Busboys & Poets, etc.

Services responses included the following:

- Dry Cleaner/laundry/laundromat
- Health Club/Gym, spa, indoor pool, yoga studio
- Hair salon, nail salon, barber
- Video store
- Music/Stereo/Computer/Electronics
- Office supply/ copy place/stationery
- Photography
- Hardware-specific stores, i.e., Home Depot, Lowe’s, appliance stores
- Garden shop/florist
- Pet Stores/Supplies and services
- Banks, specifically, Chevy Chase, Bank of America

Other Retail category included the following responses:

- Big box retailers, i.e., Best Buy, Costco, Kmart, Target, Wal-Mart, Bed, Bath & Beyond, The Container Store
- Home accessories and furnishing stores, i.e., Pier 1, Crate & Barrel, Pottery Barn
- Book Stores, i.e., Barnes & Noble, Borders
- Sporting Goods
- Movies and theater
- Gifts/Cards/Toys

Apparel responses included the following:

- General clothing
- Women’s clothing in general along with specific store names
- Men’s clothing in general along with specific store names
- Accessories
- Jewelry
- Shoes
- Department Stores
- Boutiques

Respondent Demographics:

222 residents 87%

31 non-residents 13%

Non-residents included: Office workers, Students, Business Owner, Hotel Guest

Household Make-up

55% Two person

31% Single person

5% Four person

3 % Three person

94% of the respondents had no children under the age of 16 in the household

Attachment 6

Survey Response Detail

Note: The Committee provides information based on “respondents” and “responses” below. This is because some respondents provided multiple responses to specific survey questions.

- 1. What is missing for you in the way of shopping and services within walking distance of your home or place of business in the Foggy Bottom West End neighborhood? List either a specific name of a retailer/service or general category of store/service. Rank your choices beginning with what you miss most.**

Response: 668 responses from 253 respondents

Grocery

- 92% of the respondents indicated grocery in some form
- 36% of the responses related to grocery
- 25% of the total responses mentioned full-line grocery or named specific full-line grocery stores

Restaurant

- 33% of the respondents mentioned restaurants, cafes, eateries
- 24% of the responses related to restaurants, cafes, eateries

Services

- 30% of the respondents mentioned a specific service need
- 19% of the responses indicated a specific service need

Other Retail

- 20% of the respondents indicated either a type or specific retail need
- 13% of the responses indicated either a type or specific retail need

Apparel

- 16% of the respondents mentioned apparel as a need or want
- 9% of the responses related to an apparel need or want

- 2. What service or retailer would complement what presently exists in the Foggy Bottom/West End neighborhood? List either a specific name or a retailer/service or general category of store/service. Rank your choices from most important to least important.**

Response: 630 responses from 253 respondents

Grocery

- 86% of the respondents indicated grocery in some form
- 35% of the responses related to grocery
- 23% of the total responses mentioned full-line grocery or named specific full-line grocery stores

Restaurant

- 34% of the respondents mentioned restaurants, cafes, eateries
- 24% of the responses related to restaurants, cafes, eateries

Services

- 27% of the respondents mentioned a specific service need
- 19% of the responses indicated a specific service need

Other Retail

- 21% of the respondents indicated either a type or specific retail need
- 13% of the responses indicated either a type or specific retail need

Apparel

- 13% of the respondents mentioned apparel as a need or want
- 24% of the responses related to an apparel need or want

3. Is there an existing neighborhood in the DC Metro area that meets your shopping and service needs as it presently exists today?

Response: 253 responses

- Yes 56%
- No 44%

4. Please name the neighborhood if you answered YES.

Response: 151 responses

Top ten neighborhoods most often mentioned:

- Georgetown
- Dupont Circle
- Friendship Heights
- Bethesda
- Cleveland Park
- Foggy Bottom West End
- Chevy Chase
- Clarendon
- Tenleytown
- U Street

5. If you answered YES, list the retail/service that this particular neighborhood provides that meets your shopping and service needs.

Response: 129 respondents generated 301 responses

- #1 Grocery – 25% of responses
Most often mentioned:
 - Full Service
 - Whole Foods
 - Safeway
- #2 Restaurant – 24% of responses
Most often mentioned:
 - More and greater selection
 - Mid-priced
 - Late night food and ethnic restaurants

- #3 Service – 21% of responses
Most often mentioned:
 - Hardware
 - Movies
 - Hair Salon
 - Banks and Drug Stores
- #4 Apparel– 13% of responses
Most often mentioned:
 - General apparel & clothing
 - Boutique shopping
 - Shoes
 - Department Stores
- #5 Other Retail – 12% of responses
Most often mentioned:
 - Book stores
 - Target
 - Gifts
- #6 Miscellaneous category – 5% of the responses
Most often mentioned:
 - General shopping/retail

6. What store or service takes you out of the Foggy Bottom/West End neighborhood to find?

Response: 231 respondents and 532 responses

- 32% Grocery responses
Most often mentioned:
 - Full Service
 - Whole Foods Market
 - Safeway
 - Harris Teeter and Giant Foods
- 19% Apparel responses
Most often mentioned:
 - General clothing
 - Department stores
 - Shoes
- 19% Services responses
Most often mentioned:
 - Movies
 - Hardware and Hair Salon
 - Pet Supplies and Garden Shop
- 19% Other Retail responses
Most often mentioned:
 - Target and Costco
 - Book Stores
 - Household furnishings and accessories
- 8% Restaurant responses
Most often mentioned:
 - More and greater selection of restaurants

- 3% Other comments
Most often mentioned:
 - Everything or general shopping

7. What does the term "street friendly merchant" mean to you?

Response: 233 responded with 653 responses

- #1 Entrance is easy to find, attractive and inviting – 188 responses
- #2 Has inviting window displays – 169 responses
- #3 Has attractive curbside plantings and landscaping – 137 responses
- #4 Have information boards or signs on sidewalks listing special events – 60 responses
- #5 Store has goods and merchandise displayed on the sidewalk – 35 responses
- #6 Has sidewalk sales – 26 responses
- #7 Offers product samples to people walking by – 22 responses
- #8 Hands out coupons to people who pass the store – 16 responses

8. Please give an example of the best "street friendly merchant" that you have either seen or experienced.

Response: 121 respondents with 154 responses

Most often mentioned:

- Book stores
- Outdoor dining and cafes
- Trader Joe's
- Anthropologie