



2017 Georgetown Resident Retail Spending Survey Summary of Results

Survey Overview

The Georgetown BID conducted a survey of Georgetown residents in November 2017 to understand more about their shopping and dining behavior, and what retailers, restaurants, and experiences they want in Georgetown. The BID is using these data to help property owners and commercial real estate brokers make leasing decisions that better serve the neighborhood, and encourage more residents to shop in Georgetown. Past research has revealed that Georgetown residents comprise only eight percent of total spending in Georgetown (Buxton, 2014). The survey focused on four key areas:

- Frequency of shopping and dining in Georgetown compared to other neighborhoods and online
- Products, services, and dining bought in Georgetown, in other neighborhoods, and online
- Favorite places to shop and dine in Georgetown and other neighborhoods
- Retailers, restaurants, and experiences missing in Georgetown

The survey was open October 31-November 20, 2017. The BID distributed the survey via direct mail to over 3,900 households and via the Georgetown neighborhood email list. 413 residents responded, comprising a fairly representative sample of residents by age, income, tenure in Georgetown, household size, and location in Georgetown.

Residents Want More and Better Restaurants and Bars

- 60% of survey respondents said that Georgetown needs more and better restaurants. There is a sense that new restaurants are opening in other neighborhoods, but not in Georgetown.
- Residents said they want new restaurants, at a mid-range price point, and that are neighborhood-serving as opposed to primarily serving a visitor market. Examples of the types of restaurants include Barcelona, Blacksalt, Martin's, Lebanese Taverna, Mintwood Place, and Unum.
- Many residents feel existing restaurants are outdated or exclusively geared to tourists.
- Residents are also interested in more quick service restaurants, including places like Bethesda Bagels, CAVA, District Taco, and Shake Shack.
- Residents are also interested in more local, neighborhood-serving bars, such as wine bars, cocktail bars, and neighborhood gathering spots. Examples of the types of bars include Bar a Vin and Eno Wine Bar.

Resident Want Neighborhood Services and Retailers

- Bookstores, hardware stores, kitchen stores, small format grocery stores, and local retailers topped the list of the most desired retailers in Georgetown. Specific examples of the types of

desired retailers included: Ace Hardware, Crate & Barrel, Glen's Garden Market, Little Red Fox, Salt & Sundry, Sur La Table, and West Elm.

- Other desired retailers and services included more fitness studios, pet stores, full service pharmacy, apparel for working professionals, and some specific national and international retailers. Specific examples of the kind of retailers included Barry's Bootcamp, Michael's, Muji, Nordstrom, Orange Theory, Target, and Uniqlo.
- Residents are also interested in more entertainment options, including independent cinema, live music, and performing arts.

Georgetowners' Favorite Places to Shop and Dine

- Martin's Tavern topped the list of Georgetowners' favorite places to shop and dine.
- The rest of the top ten favorite places named in the survey (in order) were: TJ Maxx, Via Umbria, Chez Billy Sud, Apple, Baked & Wired, Fiola Mare (tied), Il Canale, Boulangerie Christophe, J. Crew (tied), Clyde's, and Dean and DeLuca.
- Outside of Georgetown, the top ten favorite places to dine and shop named in the survey were Whole Foods, Le Diplomate, Nordstrom, Rasika, Saks Fifth Avenue, Trader Joe's, Bloomingdale's, Neiman Marcus (tied), Target, 2Amy's, and Macy's.

Shopping at Brick-and-Mortar Retailers and Online

- Georgetown residents shop at brick-and-mortar retailers and online at about the same rate. 41% of Georgetowners said they shop in Georgetown once a week; 43% said they shop online at least once a week.
- Georgetowners do more of their holiday shopping online than in Georgetown. 33% of respondents said they do most of their holiday shopping online; 17% said they do most of their holiday shopping in Georgetown.
- Approximately 25% of Georgetown residents said they prefer to shop online than in a physical store.

Shopping and Dining in Other Neighborhoods

- The top five other neighborhoods Georgetowners said they visit for shopping and dining were Dupont Circle, 14th Street, Downtown, Tenleytown/Friendship Heights, and Bethesda.
- Georgetowners dine out in Georgetown and other neighborhoods about as much, but slightly more often in Georgetown.
- Georgetown is leading other markets in coffee shops and sweets/baked goods retailers.
- Approximately 24% of Georgetown residents said they prefer to shop or dine in other neighborhoods besides Georgetown.

Feelings about Georgetown

- 94% of residents said they feel safe shopping and dining in Georgetown.
- 57% of residents said there are enough family-friendly activities in Georgetown.
- 14% of residents said they strongly agree that they can find the products and services they need. 50% said they somewhat agree. 25% somewhat disagreed or strongly disagreed.

78% of Georgetown residents said they would shop more in Georgetown if they could find the products, services, or experiences they need. Georgetown is a high-income neighborhood and is very walkable, so Georgetown residents are natural retail and restaurant customers. However, Georgetown residents comprise a relatively small share of total spending, but would shop and dine more in Georgetown if there were more neighborhood-serving retailers and restaurants.