Downtown Neighborhood Survey Results

Downtown DC Business Improvement District
March 2009

In November 2008, the **Downtown DC Business Improvement District** (BID), the **Downtown Neighborhood Association**, the **Penn Quarter Association** and ***The Downtowner*** sponsored the second annual Downtown Neighborhood Survey. Those who live and work Downtown are asked to respond to a set of questions designed to gain a better understanding of the Downtown community. The responses provide data to enhance retail attraction efforts and help focus on quality of life initiatives

The 2008 Survey Results

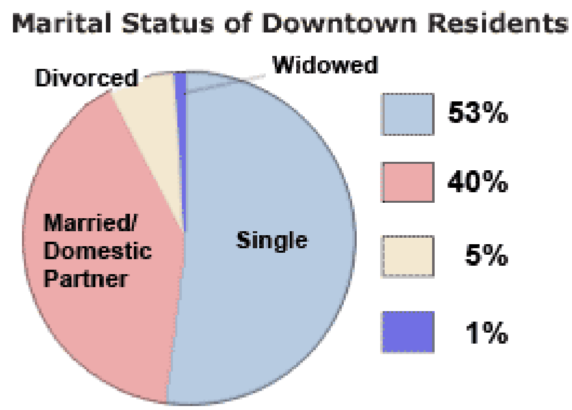
Of the 1057 respondents, 526 were residents.* The results of the 2008 survey validate most of the findings of the 2007 survey, but the opening of the Safeway in the City Vista project has resulted in some major differences. For instance:

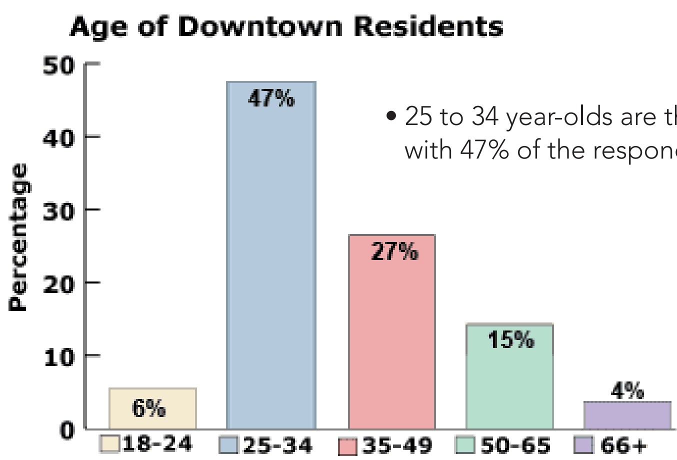
- the percentage of Downtown residents that shop for groceries Downtown grew from 10% to 56%
- residents traveling to Virginia for groceries dropped from 41% to 16%

The 2008 and 2007 surveys both suggest that Downtown BID area residents are young, well educated and earn high household incomes. Also, according to both surveys the buying preferences of residents indicates an unmet demand for shoppers' goods retail.

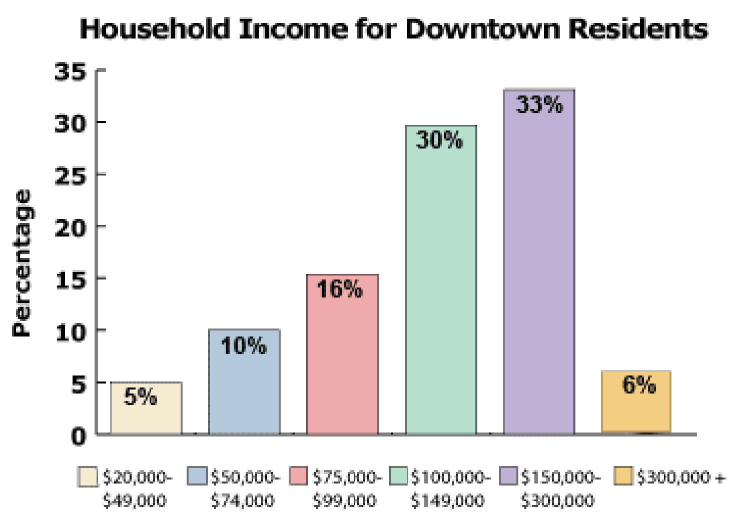
Demographics

- 52% female and 48% male.
- 58% live in households comprised of two or more adults, while 42% of respondents are the only adult in the household. This represents an average of 1.6 adults per household.
- 4% of respondents have children under 18 residing in their homes, while 96% do not.





- 25 to 34 year-olds are the largest Downtown demographic with 47% of the respondent population



- Downtown residents are remarkably well educated with 95% of respondents reporting undergraduate or graduate degrees.
- 69% of respondents have household incomes of more than $100,000 and 39% have incomes in excess of $150,000

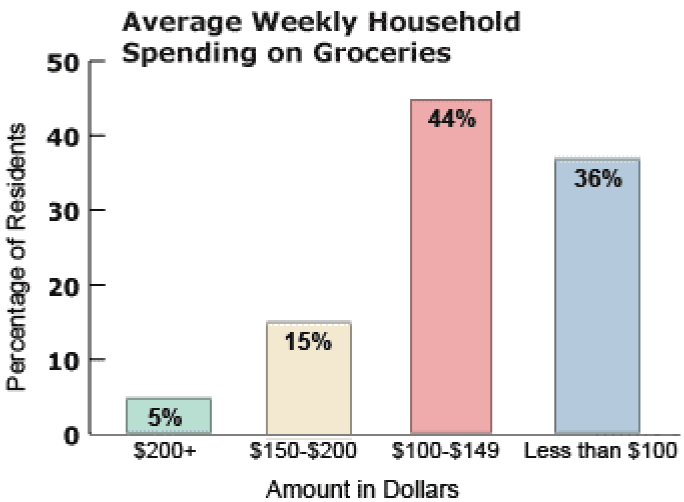
*Please note that although the sample size of both surveys was large enough to be statistically relevant, the samples were not random and cannot be considered statistically valid.

Neighborhood Perceptions

71% of respondents indicated that transportation access was a highly important factor in their decision to live Downtown. A majority of respondents indicated that cultural and entertainment amenities, and restaurants were highly important factors. Slightly under one-half considered proximity to work to be highly important.

Respondents cited homelessness as the most pressing neighborhood concern, with 57% rating it most in need of improvement. 30% of respondents rated safety as their second highest concern.

Shopping Preferences



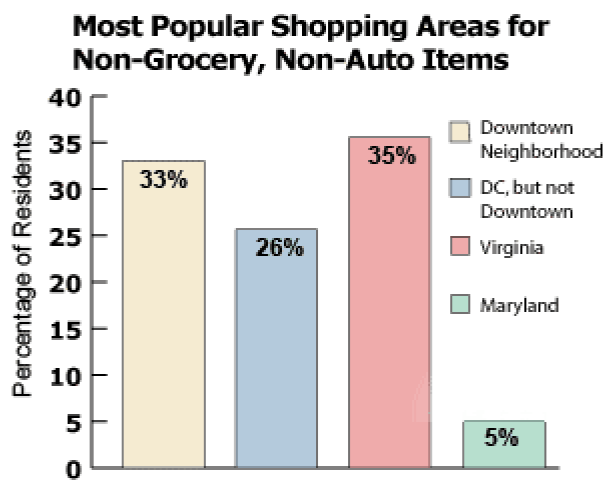
- 56% of Downtown residents shop for groceries Downtown, 25% shop for groceries elsewhere in DC, and 16% travel to Virginia.

- Nearly two-thirds of Downtown households spend more than $100 a week on groceries.

- 51% of Downtown residents spend the majority of their grocery dollars at Safeway. Whole Foods and Harris Teeter are the second and third most popular grocery stores, respectively.

- 20% of Downtown residents visit the Penn Quarter Farmers' Market only once a year and 32% have never visited the market. This represents a growth opportunity for the market.

- When shopping for non-grocery, non-auto items, two-thirds of residents usually leave the Downtown neighborhood. 35% of residents travel to Virginia to purchase these items, indicating a need for more fashion retail and shoppers' goods in both Downtown and the District of Columbia.



- Residents overwhelmingly chose grocery/food retail as the most desired category of Downtown retail.

Awareness Of Sponsoring Organizations

- Almost one-third of respondents read The Downtowner once or twice a month.

- 64% of respondents are aware of the Downtown Neighborhood Association (DNA) and 18% have attended a DNA meeting.

- 70% of respondents are aware of the Downtown DC Business Improvement District (BID) and the organization's work throughout the neighborhood. 83% supported residential buildings joining the BID if the BID offered to increase services.

For more information regarding the Downtown Neighborhood Survey or to obtain complete survey results, please contact the Downtown Business Improvement District at survey@downtowndc.org or (202) 661-7591.