LAKE ANNE ECONOMIC VISIONING

STAKEHOLDER ONLINE SURVEY RESULTS

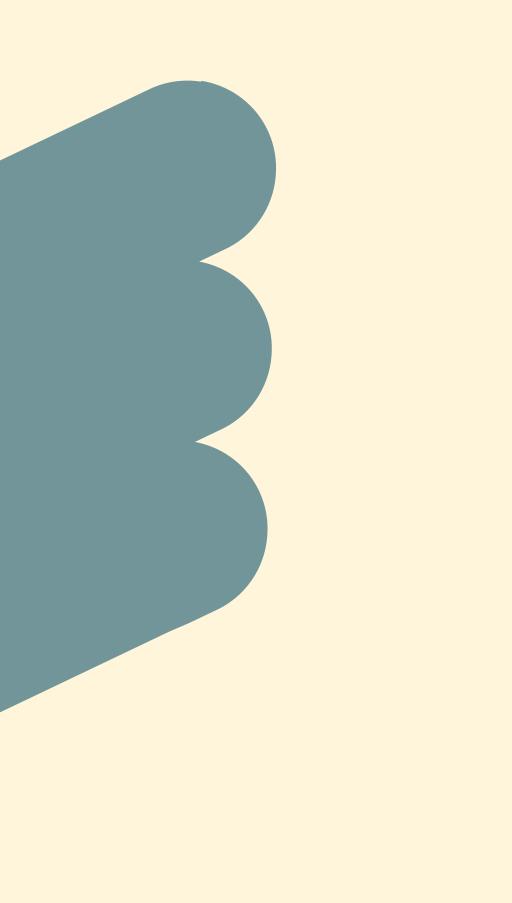
PREPARED FOR FAIRFAX COUNTY, VA MARCH 2023



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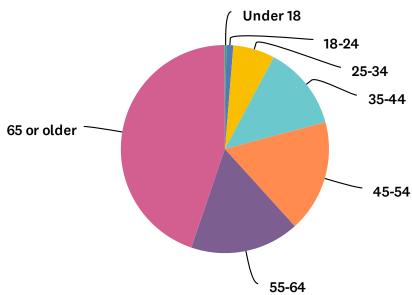
- **01 DEMOGRAPHICS**
- **02 BUSINESS OWNER RESPONSES**
- **03 CHARACTER**
- **04 SHORT ANSWER**

01 DEMOGRAPHICS



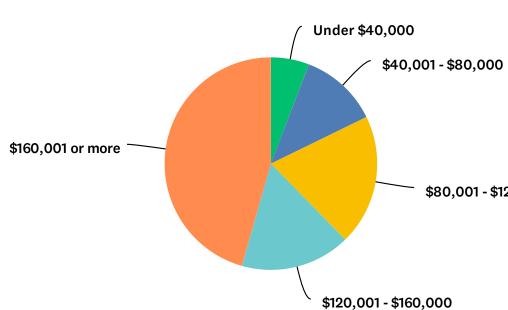
Q1 What is your age?

Answered: 912 Skipped: 20



ANSWER CHOICES	RESPONSES	
Under 18	0.22%	2
18-24	1.10%	10
25-34	6.47%	59
35-44	13.05%	119
45-54	17.43%	159
55-64	17.00%	155
65 or older	44.74%	408
TOTAL		912

Q2 What is your household Income?



ANSWER CHOICES	RESPONSES	
Under \$40,000	5.81%	50
\$40,001 - \$80,000	11.98%	103
\$80,001 - \$120,000	19.88%	171
\$120,001 - \$160,000	16.74%	144
\$160,001 or more	45.58%	392
TOTAL		860

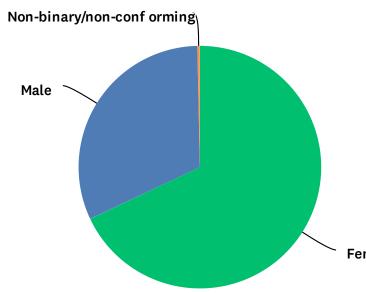
Answered: 860 Skipped: 72

STREETSENSE

\$80,001 - \$120,000

Q3 What gender do you identify as?

Answered: 903 Skipped: 29



ANSWER CHOICES

Female

Male

Transgender Female

Transgender Male

Non-binary/non-conforming

TOTAL

STREETSENSE

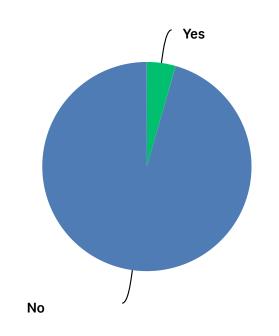
LAKE ANNE ECONOMIC VISIONING/ SURVEY RESULTS

RESPONSES	
68.00%	614
31.67%	286
0.00%	0
0.00%	0
0.33%	3
	903

Female

Q4 Are you of Hispanic, Spanish, or Latino origin?

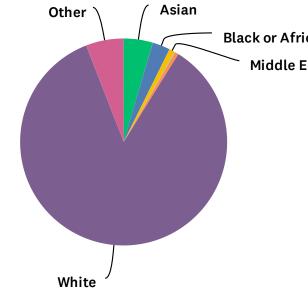
Answered: 902 Skipped: 30



ANSWER CHOICES	RESPONSES
Yes	4.43% 40
No	95.57% 862
TOTAL	902

Q5 Race – How would you describe yourself?

Answered: 902 Skipped: 30



ANSWER CHOICES	RESPONSES	
Asian	4.55%	41
Black or African American	2.77%	25
Middle Eastern or North African	0.89%	8
Native American	0.11%	1
Native Hawaiian or Other Pacific Islander	0.55%	5
White	85.25%	769
Other	5.88%	53
TOTAL		902

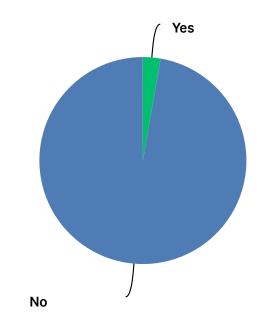
LAKE ANNE ECONOMIC VISIONING/ SURVEY RESULTS

Black or African American

Middle Eastern or North African

Q6 Did you also participate in one of our virtual focus groups?

Answered: 909 Skipped: 23

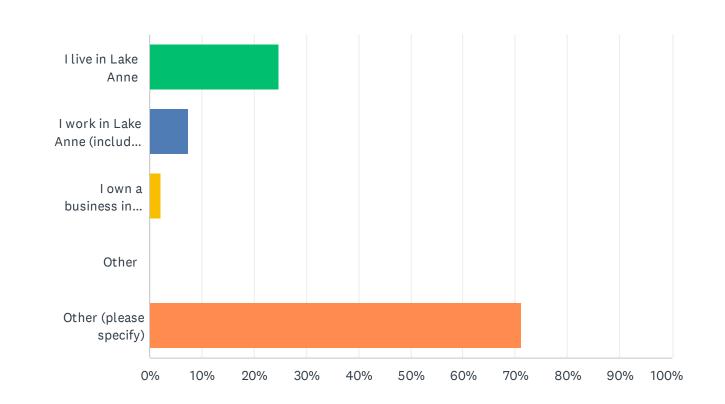


ANSWER CHOICES	RESPONSES	
Yes	2.75% 25	5
No	97.25% 884	4
TOTAL	909	9

Q7 Check all that apply:

Answered: 867 Skipped: 65

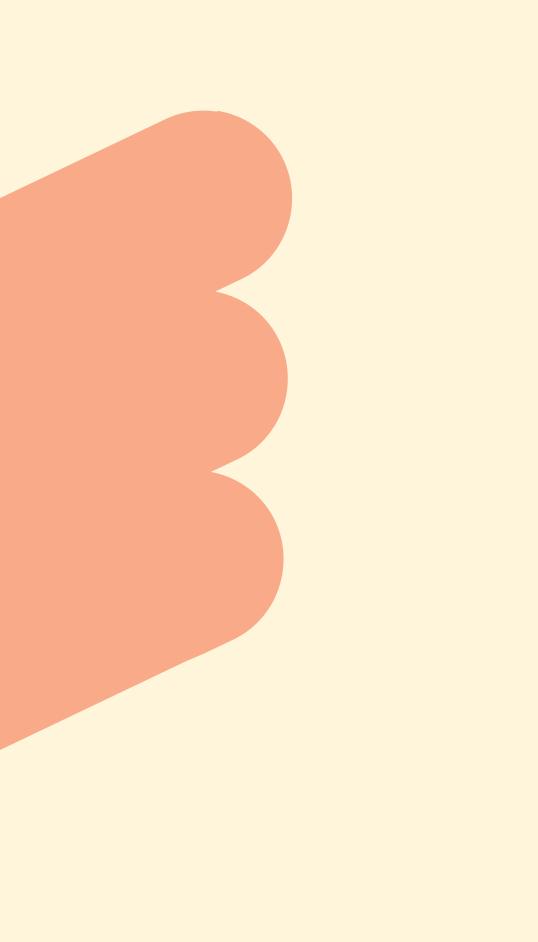
MOST RESPONDENTS SELECTED "OTHER" AND INDICATED THAT THEY LIVE IN OR NEAR **RESTON AND/OR VISIT LAKE** ANNE



ANSWER CHOICES	RESPONSES	
I live in Lake Anne	24.68%	214
I work in Lake Anne (including remote)	7.38%	64
I own a business in Lake Anne	2.19%	19
Other	0.00%	0
Other (please specify)	71.16%	617
Total Respondents: 867		

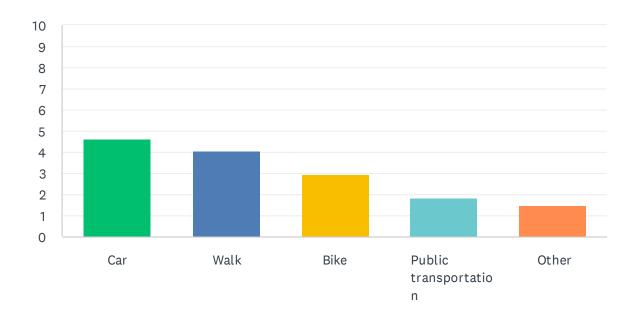
STREETSENSE

02 BUSINESS OWNER RESPONSES



Q8 How do most of your customers arrive at your place of business? (i.e. car, walk, bike, public transportation) - Rank in order of frequency

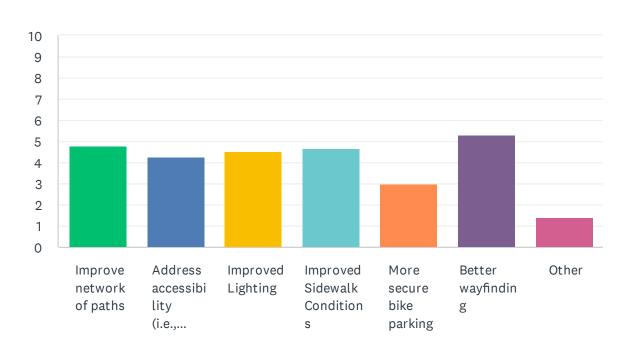
Answered: 14 Skipped: 918



1	2	3	4	5	TOTAL	SCORE
64.29%	35.71%	0.00%	0.00%	0.00%		
9	5	0	0	0	14	4.64
28.57%	50.00%	21.43%	0.00%	0.00%		
4	7	3	0	0	14	4.07
0.00%	14.29%	64.29%	21.43%	0.00%		
0	2	9	3	0	14	2.93
0.00%	0.00%	7.14%	71.43%	21.43%		
0	0	1	10	3	14	1.86
7.14%	0.00%	7.14%	7.14%	78.57%		-
1	0	1	1	11	14	1.50
	9 28.57% 4 0.00% 0 0.00% 0	$ \begin{array}{c} 64.29\% \\ 9 \\ 28.57\% \\ 4 \\ 7 \\ 0.00\% \\ 0 \\ 0 \\ 0 \\ 0 \\ 0 \end{array} \begin{array}{c} 35.71\% \\ 5 \\ 50.00\% \\ 7 \\ 2 \\ 0.00\% \\ 0 \\ 0 \\ 0 \\ 0 \end{array} \end{array} $		$ \begin{array}{c c c c c c c c c c c c c c c c c c c $		64.29% 9 $35.71%$ 5 $0.00%$ 0 $0.00%$ 0 $0.00%$ 0 14 $28.57%$ 4 $50.00%$ 7 $21.43%$ 3 $0.00%$ 0 $0.00%$ 14 14 $0.00%$ 0 $14.29%$ 2 $64.29%$ 2 $21.43%$ 3 $0.00%$ 14 14 $0.00%$ 0 $14.29%$ 2 $64.29%$ 2 $21.43%$

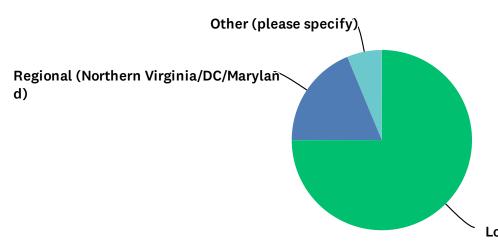
Q9 What would make it more appealing to your customers to arrive on foot or by bike? Rank in order

Answered: 15 Skipped: 917



Q10 Where do the majority (60-70%+) of your customers come from?

Answered: 16 Skipped: 916



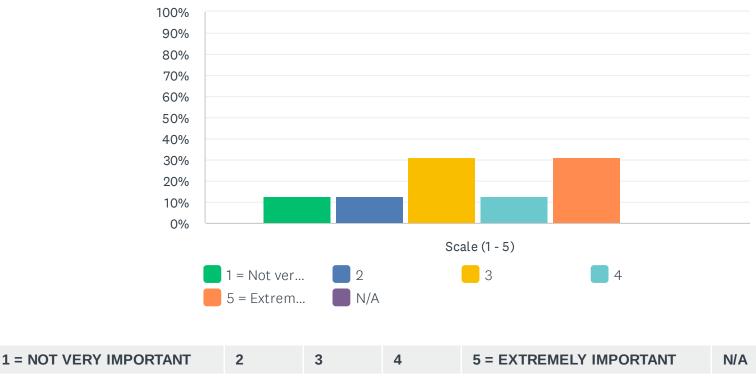
ANSWER CHOICES	RESPONSES	
Local (Reston area)	75.00%	12
Regional (Northern Virginia/DC/Maryland)	18.75%	3
National	0.00%	0
Other (please specify)	6.25%	1
TOTAL		16

STREETSENSE

Local (Reston area)

Q11 On a scale of 1 to 5, how important is your online presence to your sales?

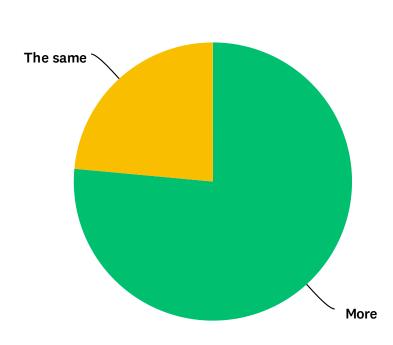




1	1 = NOT VERY IMPORTANT	2	3	4	5 = EXTREMELY IMPORTANT	N/A	TOTAL	WEIGHTED AVERAGE
Scale (1 - 5)	12.50%	12.50%	31.25% 5	12.50% 2	31.25% 5	0.00%	16	3.38

Q12 Do you think there should be more retail at Lake Anne or less?

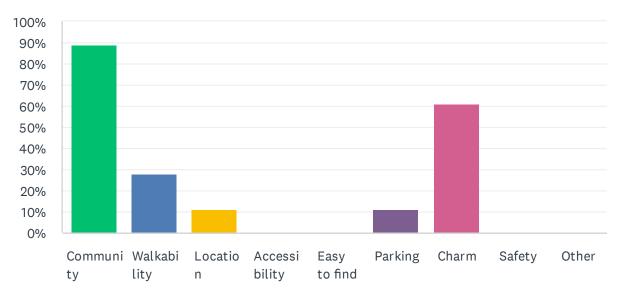
Answered: 17 Skipped: 915



ANSWER CHOICES	RESPONSES	
More		13
Less	0.00%	0
The same	23.53%	4
TOTAL		17

Q13 What are the TWO biggest advantages to be

Answered: 18 Skipped: 914



ANSWER CHOICES	RESPONSES
Community	88.89% 16
Walkability	27.78% 5
Location	11.11% 2
Accessibility	0.00% 0
Easy to find	0.00% 0
Parking	11.11% 2
Charm	61.11% 11
Safety	0.00% 0
Other	0.00% 0
Total Respondents: 18	

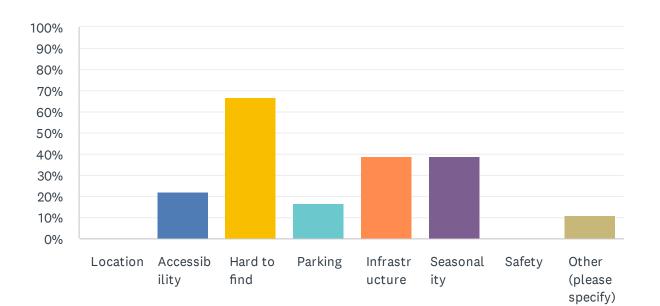
STREETSENSE

SURVEY RESULTS

being	located	at	Lake	Anne?
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Q14 What are the TWO biggest challenges of being located at Lake Anne?

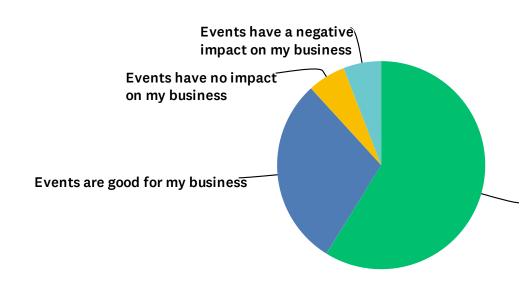
Answered: 18 Skipped: 914



ANSWER CHOICES	RESPONSES	
Location	0.00%	0
Accessibility	22.22%	4
Hard to find	66.67% 1	2
Parking	16.67%	3
Infrastructure	38.89%	7
Seasonality	38.89%	7
Safety	0.00%	0
Other (please specify)	11.11%	2
Total Respondents: 18		

Q15 How do events like the farmers market and the cardboard boat regatta impact your business?

Answered: 17 Skipped: 915



ANSWER CHOICES

Events are absolutely critical to the success of my business

Events are good for my business

Events have no impact on my business

Events have a negative impact on my business

Other (please specify)

TOTAL

Events are absolutely critical to the success of my business

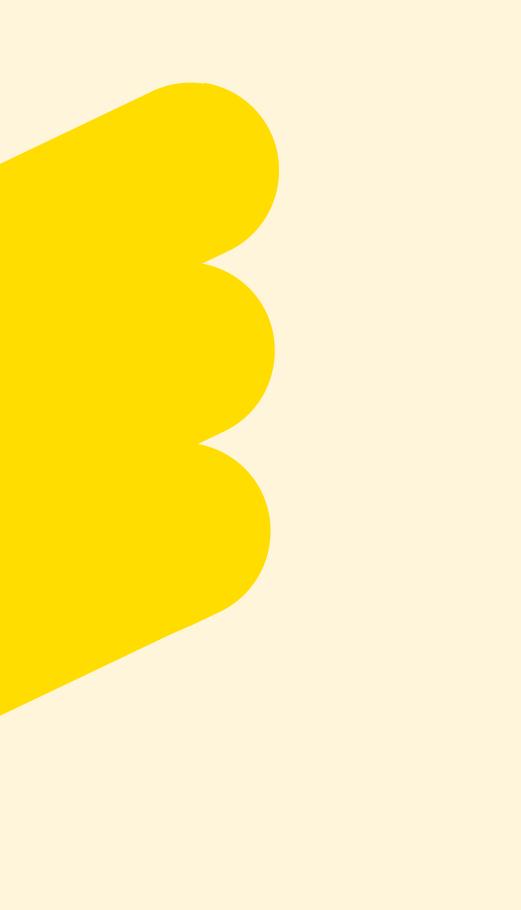
RESPONSES	
58.82%	10
29.41%	5
5.88%	1
5.88%	1
0.00%	0
	17

Q16 Do you have anything else you'd like to share about operating a business at Lake Anne?

Answered: 7 Skipped: 925

#	RESPONSES	DATE
1	RCC having withdrawn their support, we limp along without even our previous level of sponsored events due to irascibility of the LARCA Board.	3/10/2023 10:14 AM
2	The overall and growing shabbiness of Lake Anne is appalling. The failure to enforce covenants on residents and businesses contributes to the sense that we are just a declining, "used to be" location that's only good in the summer. The street level has grown worse since Covid. Our two largest restaurants just don't seem to care about their appearance, the vacant shops look terrible. It's clear that some businesses really care and put forth great effort, but the rest are terrible.	3/6/2023 8:34 AM
3	Events take away vital parking from my business. We have to close on event days. My clients need close parking to carry patients into the building. My staff need access to the building 24/7 to take care of patients.	2/20/2023 6:43 PM
4	Quayside is not shown on the map on the first page of this survey. Signage is a significant and ongoing issue and should be fairly easy and inexpensive to fix. Let's uncomplicate this problem and move forward with solutions to have an immediate impact on the Plaza	2/20/2023 12:52 PM
5	The benefits of WELL PLANNED AND MANAGED events and festivals are critical to the success of Lake Anne Plaza. It was devastating for Lake Anne to lose the Thursday night concerts, and when the budget for the former merchants committee was revoked by the Board, we also lost the funds that were used for marketing, PR, our summer movie series, community yoga series, and other great programs, all of which added to the vitality of our community.	2/18/2023 4:34 PM
6	Lack of cooperation of LARCA BOD with RCC and merchants - two RCC vital events left Lake Anne in the last year - weekly free concerts in the summer months and the Multicultural Festival, competition for events and cost of use of the plaza for events.	2/17/2023 1:51 PM
7	Wayfinding for GPS is a constant struggle, but it's a great community!	2/17/2023 1:35 PM

03 CHARACTER

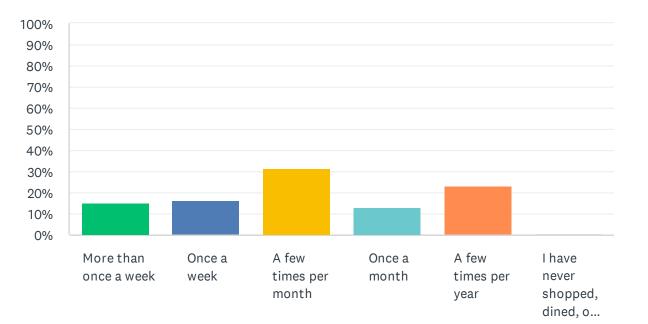


Q17 What is ONE WORD that comes to mind when you think of the character of Lake Anne today?

Neglected quiet Retro Serene friendly struggling Dilapidated Diry Interesting Inviting Relaxing Special Shabby Open Brutalist original Quaint sad Beautiful Pleasant Outdated neighborly Unique classic Old Eclectic Charming Declining Comunity Great Historic Run Dated run-down Tired Lovely Rundown Local Potential Lively Aging Mid-century Welcoming Depressing Underutilized Underdeveloped EUropean Concrete Diverse History Ugly Inclusive Peaceful architecture Reston

Q18 How frequently do you patronize the businesses at Lake Anne?

Answered: 716 Skipped: 216



ANSWER CHOICES

More than once a week

Once a week

A few times per month

Once a month

A few times per year

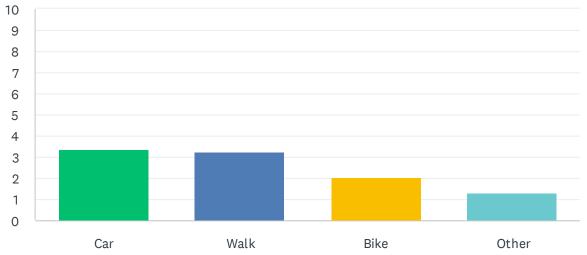
I have never shopped, dined, or patronized a service at Lake Anne

TOTAL

RESPONSES	
15.36%	110
16.06%	115
31.56%	226
13.41%	96
23.18%	166
0.42%	3
	716

Q19 How do you typically arrive at Lake Anne? Rank in order of frequency

Answered: 649 Skipped: 283

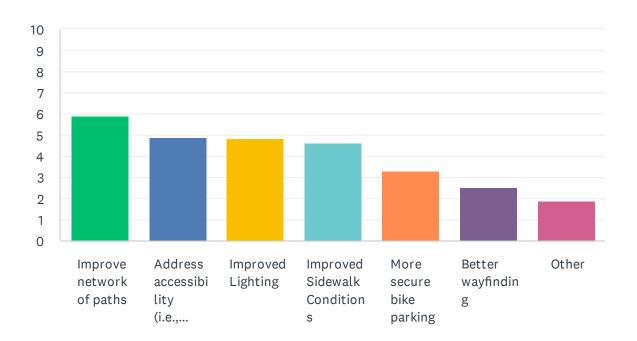


	1	2	3	4
Car	52.54% 341	33.74% 219	10.63% 69	
Walk	44.07% 286	39.75% 258	13.41% 87	
Bike	2.47% 16	19.72% 128	59.17% 384	
Other	0.92% 6	6.78% 44	16.80% 109	

	TOTAL	SCORE	
3.08% 20	(649	3.36
2.77% 18	(649	3.25
18.64% 121	(649	2.06
75.50% 490	(649	1.33

Q20 What would make it more likely for you to walk or bike to Lake Anne? Rank in order

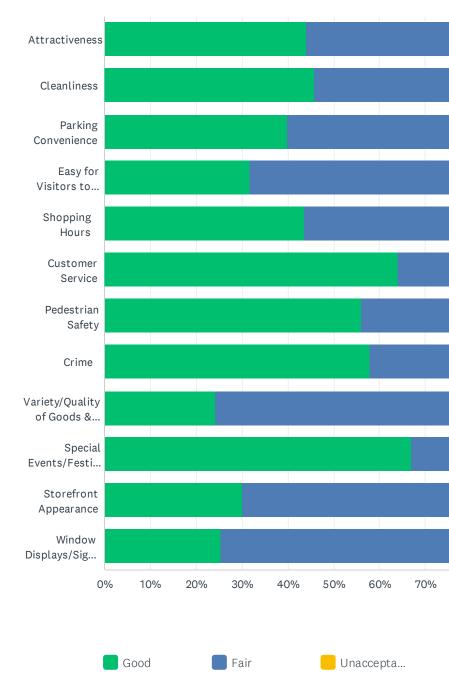
Answered: 619 Skipped: 313



	1	2	3	4	5	6	7	TOTAL	SCORE
Improve network of paths	44.43% 275	25.36% 157	15.19% 94	8.89% 55	4.68% 29	0.81% 5	0.65% 4	619	5.91
Address accessibility (i.e., steps)	11.79% 73	27.95% 173	24.39% 151	17.45% 108	10.66% 66	6.46% 40	1.29% 8	619	4.88
Improved Lighting	14.05% 87	17.12% 106	30.05% 186	25.20% 156	8.72% 54	2.75% 17	2.10% 13	619	4.86
Improved Sidewalk Conditions	11.15% 69	18.09% 112	18.26% 113	32.47% 201	16.48% 102	3.23% 20	0.32% 2	619	4.64
More secure bike parking	4.85% 30	6.79% 42	5.98% 37	9.21% 57	45.88% 284	22.78% 141	4.52% 28	619	3.29
Better wayfinding	3.07% 19	3.23% 20	5.17% 32	6.14% 38	12.60% 78	56.22% 348	13.57% 84	619	2.55
Other	10.66% 66	1.45% 9	0.97% 6	0.65% 4	0.97% 6	7.75% 48	77.54% 480	619	1.87

Q21 How would you rate the district on the following characteristics

Answered: 715 Skipped: 218





TOP ANSWERS

- GROCERIES
- HARDWARE STORE
- RESTAURANTS

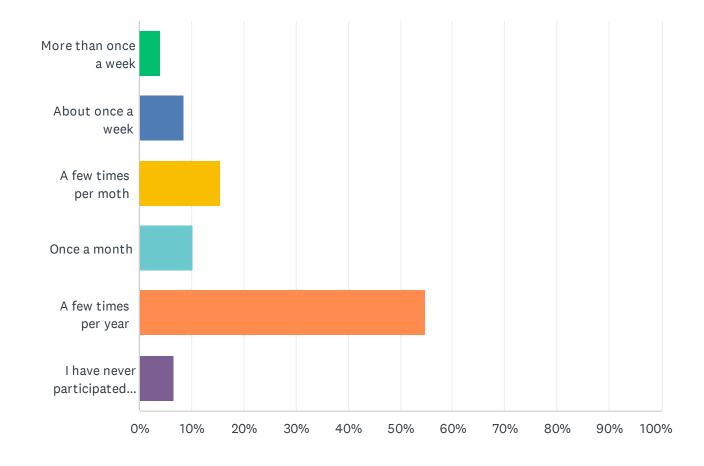
Q22 What businesses (shopping, services, restaurants) do you leave your neighborhood for? Name three. Please be specific, i.e. "Lowes" rather than "hardware store."

> Market Anne Coffee Shop Anne Brew House Lake anne brewery Lake Anne Reston Used Book Cafe Montmartre clothing Reston Bookstore Kalypso RCC Trader Joe s Walmart Food post office Anne Coffee House Mom Organic Grocery Trader Joe Chesapeake Chocolates Farmers Market starbucks Lake Anne Coffee supermarket Whole Foods Grocery shopping Wegmans CVS Restaurants Aldi Harris Teeter Kalypsos Giant Coffee shop Home Depot Montmartre Groceries Giant Supermarket Trader Joes Wine Bar Safeway Reston Community Center Target shopping Costco Mom Grocery store Calypsos Wegman Sweetgreen S Cafe Montmarte LOWES MOM Organic Market Cafe used book shop Lake Anne Brew store

Grocery Store Reston Community Center Library Dairy queen Safeway Dry Cleaning Trader Joe North Point Grocery Walmart Reston Hardware Lake Anne Chipotle Cafe Pharmacy Kalypso Walgreens Wegmans Reston Used Book shopping Lake Anne Brew Trader Joes Farmer Market Giant Entertainment Restaurant Community Center

Q23 How frequently do you participate in arts and cultural events at Lake Anne (art classes, festivals, markets, etc.)

Answered: 706 Skipped: 226



Q24 What cultural institutions do you leave your neighborhood for? Name three. Please be specific, i.e. "Academy of Russian Ballet" rather than "ballet lessons."

> Plays Multicultural Festival Dance Players National Gallery Art ballet Library Washington RCC Birchmere None sports theatre Public Library Herndon National Gallery Museum productions Concerts Art Gallery Center stage Reston Reston Museum Theater Arena Stage Wolf Trap Cinema Arts Kennedy Center Lake Anne Arts National **Reston Community Center**_N Smithsonian Museums performances Smithsonian Studios Movies Art Shows Music Capital One Hall Community Center events Wolftrap market Movie theater DC classes space Farmers Market Performing Arts Festival Next stop theater shows

market Capital One Hall performances Meadowlark Gardens National Gallery Art venue Stage None Art Gallery NextStop Theatre Herndon music Fairfax festival RCC Hunters Wood Smithsonian Next Stop Theater Reston town center

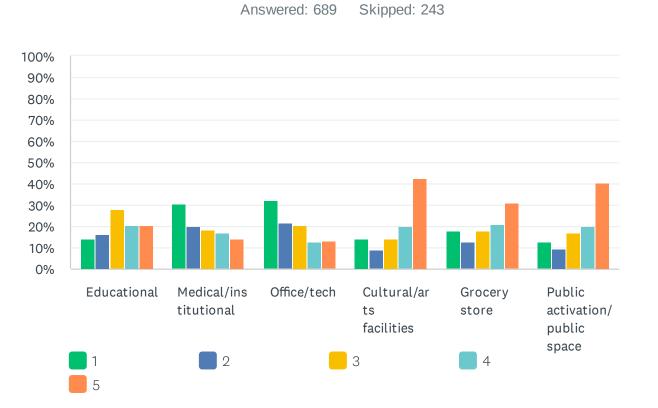
TOP ANSWERS

- MUSEUMS
- CONCERTS
- THEATER

- MOST PEOPLE PREFER CULTURAL/ARTS FACILITIES, PUBLIC ACTIVATION/PUBLIC SPACE, AND A GROCERY STORE AS ANCHOR OPTIONS.

- OPINIONS ON AN EDUCATIONAL ANCHOR ARE MIXED.

- MEDICAL/INSTITUTIONAL AND OFFICE/TECH ARE NOT POPULAR IDEAS. Q25 Anchor uses are the stores and institutions that drive traffic to an area. Please rank each on a scale of 1 (least appropriate) – 5 (most appropriate) anchor uses that you believe might be appropriate for further exploration for a re-envisioned Lake Anne.

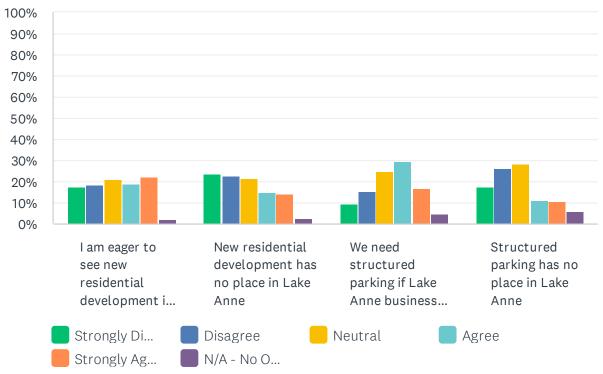


- 40.91% OF RESPONDENTS AGREE OR STRONGLY AGREE WITH NEW RESIDENTIAL DEVELOPMENT; 21.17% ARE NEUTRAL, 35.76% DISAGREE **OR STRONGLY DISAGREE**

- PEOPLE TEND TO AGREE OR **BE NEUTRAL ON THE NEED** FOR STRUCTURED PARKING IN THE AREA

Q26 How much do you agree with the following statements?

Answered: 704 Skipped: 228

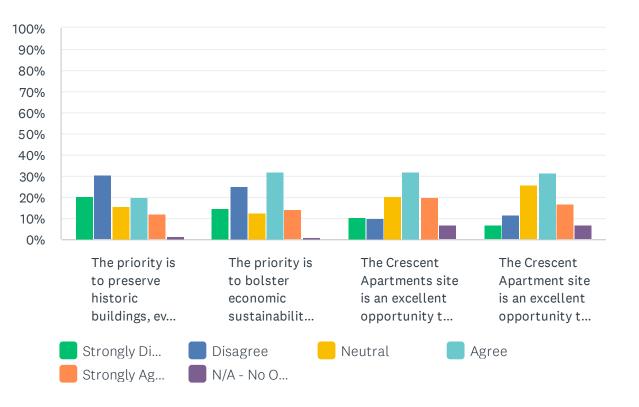


	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	N/A - NO OPINION	TOTAL	WEIGHTED AVERAGE
I am eager to see new residential development in and around Lake Anne	17.45% 122	18.31% 128	21.17% 148	18.88% 132	22.03% 154	2.15% 15	699	3.10
New residential development has no place in Lake Anne	23.88% 165	22.72% 157	21.71% 150	14.62% 101	14.33% 99	2.75% 19	691	2.72
We need structured parking if Lake Anne businesses are to succeed	9.46% 66	15.19% 106	24.50% 171	29.37% 205	16.76% 117	4.73% 33	698	3.30
Structured parking has no place in Lake Anne	17.54% 121	26.52% 183	28.41% 196	11.16% 77	10.72% 74	5.65% 39	690	2.69

Q27 How much do you agree with the following statements?

- PEOPLE TEND TO DISAGREE THAT PRESERVATION OF HISTORIC BUILDINGS IS A TOP PRIORITY

- PEOPLE TEND TO AGREE OR BE NEUTRAL ON ADDITIONAL DENSITY AT THE CRESCENT APARTMENTS SITE, WHETHER IT IS ADDITIONAL **RESIDENTIAL OR OTHER USES** Answered: 706 Skipped: 226



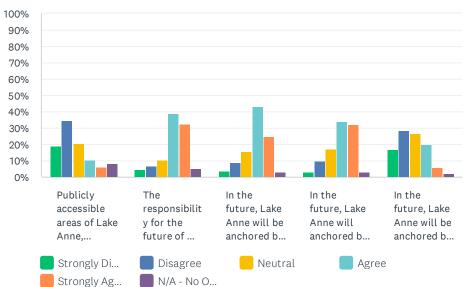
	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	N/A - NO OPINION	TOTAL	WEIGHTED AVERAGE
The priority is to preserve historic buildings, even if it means making hard choices like selling off the parking lot for development	20.31% 142	30.33% 212	16.02% 112	19.74% 138	12.02% 84	1.57% 11	699	2.72
The priority is to bolster economic sustainability, even if it means making hard choices about historic assets	14.99% 104	25.36% 176	12.54% 87	31.84% 221	14.27% 99	1.01% 7	694	3.05
The Crescent Apartments site is an excellent opportunity to infuse residential density through additional mixed-income and market rate housing in support of Lake Anne	10.27% 71	10.13% 70	20.55% 142	32.13% 222	20.12% 139	6.80% 47	691	3.45
The Crescent Apartment site is an excellent opportunity to infuse economic activity through the addition of cultural, commercial, or institutional uses.	6.79% 47	11.42% 79	26.01% 180	31.79% 220	17.05% 118	6.94% 48	692	3.44

Q28 How much do you agree with the following statements

- PEOPLE TEND TO AGREE THAT RESPONSIBILITY FOR PUBLIC AREAS OF LAKE ANNE SHOULD BE BORNE BY A WIDER SET OF PARTIES THAN THE CURRENT ARRANGEMENT

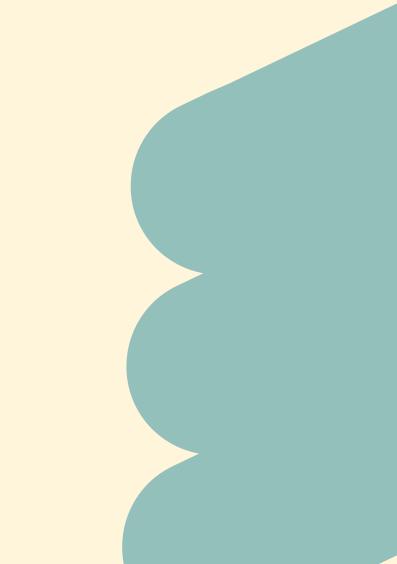
- PEOPLE ARE MORE ENTHUSIASTIC ABOUT CULTURAL AND COMMUNITY-SERVING ANCHOR USES THAN THEY ARE ABOUT EDUCATIONAL, TECH, OR **OFFICE USES**

Answered: 711 Skipped: 222

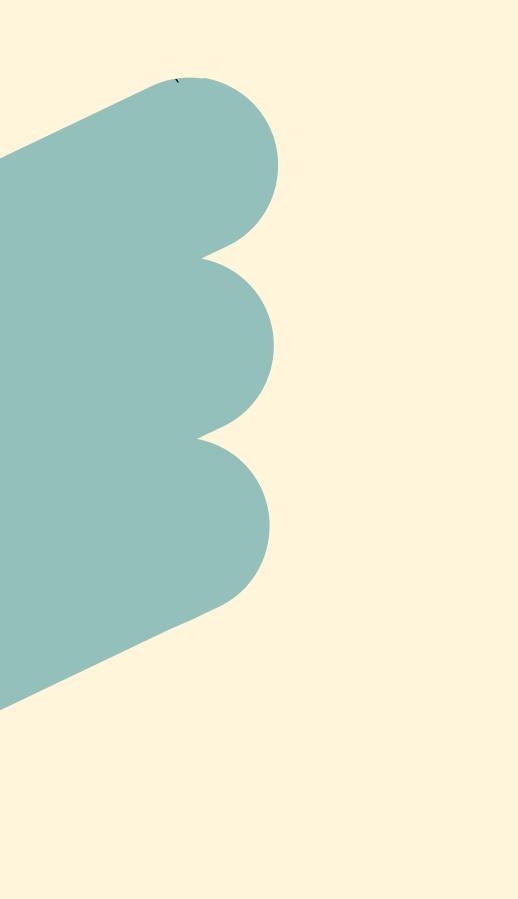


	STRONGLY DISAGREE	DISAGREE	NEUTRAL	AGREE	STRONGLY AGREE	N/A - NO OPINION	TOTAL	WEIGHTED AVERAGE
Publicly accessible areas of Lake Anne, including Washington Plaza and the parking lot, should remain the sole responsibility of LARCA and Washington Plaza Cluster	19.05% 133	34.96% 244	20.49% 143	10.46% 73	6.45% 45	8.60% 60	698	2.46
The responsibility for the future of the publicly accessible areas of Lake Anne, including Washington Plaza, and the parking lot, should be borne by a wide set of responsible parties, including the County, the Reston Association, and the Reston Community Center, etc.	4.89% 34	7.05% 49	10.65% 74	39.14% 272	32.81% 228	5.47% 38	695	3.93
In the future, Lake Anne will be anchored by a neighborhood- and community-serving destination consisting of convenience goods and services - a place where neighbors go for Saturday-morning errands	3.70% 26	9.10% 64	15.93% 112	43.24% 304	24.75% 174	3.27% 23	703	3.79
In the future, Lake Anne will anchored by cultural and performing arts destinations, attracting visitors who may drive up to an hour to enjoy an array of restaurants, events, cultural experiences, etc.	3.26% 23	9.77% 69	17.56% 124	34.28% 242	32.15% 227	2.97% 21	706	3.85
In the future, Lake Anne will be anchored by institutional uses that might include educational or medical or office buildings whose occupants patronize the amenities and businesses found at Lake Anne.	16.95% 119	28.35% 199	26.64% 187	20.23% 142	5.56% 39	2.28% 16	702	2.68









Q29 When you think about Lake Anne today, as a business owner, resident, employee, visitor, or other community member, what is working well?

> visiting gathering cultural events coffee outdoor dining diversity variety festivals farmers market wonderful Washington Plaza interesting local businesses needs ability USE one go architecture charm local beautiful outdoor people s RCC Farmer s market Small businesses sense community Space Coffee House community events setting walking water great also place bookstore events sit Reston cultural good community feel businesses open space lake dining restaurants beauty farmers market mix Lake Anne coffee shop plaza farmers market festivals love neighborhood area parking community etc feel visitors nice many shops good restaurants working well boat rentals festivals special events enjoy accessibility unique art community center commercial Walkability center Well services Used book store think small small shops much public spaces location meeting friends brewery Reston Community Center post office open Saturday housing walking paths lots access day

Q30 What is not working well at Lake Anne today, for you as an individual, your customers, or your business?

> also retail walking signage maintenance poor condition closed business owners feel needs repair Open condition attract well run access dated outdated see bring USe visitors events trash look Need better Seems services time overall places hard old new better Heron House Stores Washington Plaza buildings want lack aged restaurants grocery Lake Anne much parking lot residents businesses structures parking housing needs around plaza little area upkeep shops poor enough small businesses many infrastructure people even grocery store sidewalks S ugly SpaceS farmers market makes live great take go entrance Reston gives dirty patrons etc offer Options accessibility appearance tired know foot traffic CONCrete empty storefronts ONe think hours way lot handicapped limited lake

Q31 What is the biggest change you would like to see at Lake Anne 30 years from now?

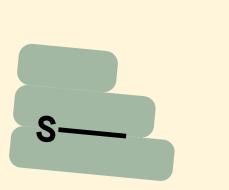
development market will people live character's add appearance expand way look means thriving Less local density Updated design change outdoor great Better parking arts feel activities center infrastructure cultural place housing lake water maintaining years Space living See Reston Town Center parking affordable housing Reston access plaza interesting better including area maintenance restaurants lots businesses services community Increased Lake Anne nice buildings farmers market shops parking lot people stay vibrant open stores original grocery store modern need retail make structures keep go events small shops support see Lake Anne Want think destination existing residents diversity SUStainable take much upgrades cleaner maybe improved festivals small businesses want see historic parking area new still variety used

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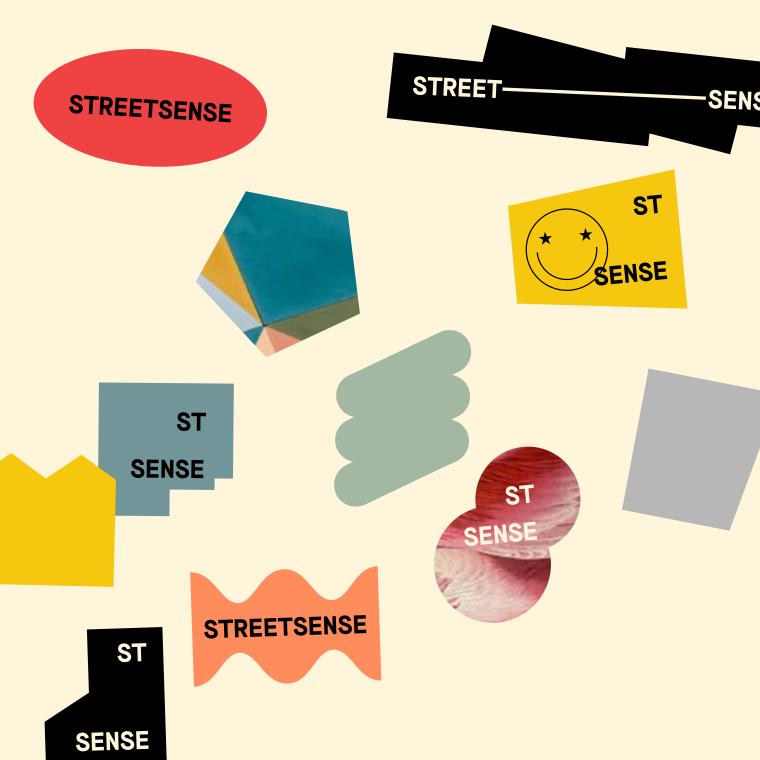
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