The Leesburg Downtown Market Study

An Analysis of Shopper and Stakeholder Perceptions

Economic Development & Tourism Department

Town of Leesburg

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Acknowledgments

We are very grateful to the Town of Leesburg, especially Betsy Fields, CEcD, Economic Development & Tourism Director, Marantha Edwards, CMSM, Tourism and Marketing Manager, and Lisa Capraro, until recently Downtown Coordinator. Their diligence and expertise in helping to organize the study, provide background information, and arrange the logistics of the surveys, focus groups and interviews made the entire process go very smoothly. Thanks also to Tripp Muldrow of ArnettMuldrow & Associates for sharing important market-research findings with us.

We are also grateful to the many persons who gave their time to participate in the study. They include the following Downtown business owners, who collected 1,423 residence zip codes from their customers in June and July, 2007: Black Shutter, Eyetopia, Lavender Moon, Lou Lou, Market Street Coffee, Old Country Peddler, Petit Dekor, Pink Shop/Very Virginia, Reign of Cats of Dogs, Resourceful Woman, and The Cottage. The proprietors of several Downtown retail and dining establishments gave in-depth interviews, as did several property owners and developers, government officials, and non-profit organization directors. We are grateful to all of them for their insights about the Downtown.

Last but not least, we are very grateful to the many persons who gave us the user's perspective on Downtown. These include the 240 persons who were surveyed on the street at several locations Downtown, and at the Leesburg Corner Premium Outlets and Lansdowne Marketplace. They also include the persons who participated in the focus-group discussion at Ida Lee Park, as well as the members of the Historic District Residents Association and the Woodlea Manor neighborhood, who also participated in focus-group discussions.

Executive Summary

As part of its efforts to enhance its historic Downtown core, the Town of Leesburg commissioned Virginia Commonwealth University to conduct an analysis of the Downtown market. The analysis is based upon several sources of primary information – 1,423 shopper zip-code residences collected by 11 Downtown businesses, shopper-intercept surveys of 240 persons, three focus-group discussions, and 25 in-depth interviews with Downtown property and business owners and other stakeholders. These methods yielded a rich profile of the Downtown user and numerous suggestions for enhancements to the Downtown that would attract more users on a more consistent basis.

Summary of Survey and Focus-Group Perceptions

Downtown's primary user group lives in or near the Town of Leesburg, principally in zip codes 20176 and 20175 and to a lesser extent 20147 and 20180. Residents of the Town of Leesburg come Downtown frequently and tend to be strong supporters of the Downtown, but also strong critics of some of its current offerings. County and Town workers and professionals also use the Downtown on a daily or near-daily basis.

Downtown's secondary trade area extends about 50 miles east to west and almost all of Downtown's users live within 100 miles of Leesburg. Few persons come from outside of this region for the purpose of visiting Downtown Leesburg.

Downtown's primary user group is middle aged and female and lives in a household with an annual income exceeding $100,000. Slightly over half of these households are families with children, with the rest distributed about evenly among singles and couples with no children.

About one half of Downtown's users come there at least once per week. They prefer to shop both on weekdays and weekends. About one half of the Downtown users surveyed for this study stated that they prefer to shop in the afternoons. Over one third of local residents surveyed at the Leesburg Corner Premium Outlets or Lansdowne Marketplace stated that they prefer evening shopping hours, and some survey respondents gave the Downtown low marks for not having enough stores or restaurants open in the evenings. Many focus-group participants criticized Downtown businesses for not staying open in the evenings.

Downtown's primary attraction is restaurants, followed by shopping. Downtown users particularly like its historic fabric and small-town, pedestrian-oriented ambience. Many are particularly fond of

Lightfoot and Tuskie's restaurants. Other popular establishments include Market Street Coffee, Leesburg Restaurant, the Leesburg Vintner, China King, Antique Emporium, Tally Ho, Black Shutter, Reign of Cats and Dogs, and Esoterica.

Respondents to the shopper-intercept survey conducted in July 2007 were asked if they were visiting any of Downtown's cultural attractions or other points of interest that day. Only a few respondents stated that they were visiting any of these places. Of these, most stated that they were visiting Market Station, the Loudoun Museum, or Dodona Manor.

Out-of-town visitors spend more per person on dining Downtown than they do at the Lansdowne Marketplace and Leesburg Corner Premium Outlets. Area residents spend roughly the same amount, per person, dining Downtown as they do at the Outlets or Marketplace (but this includes both Downtown workers eating lunch as well as persons having dinner). Out-of-town visitors spend more per person shopping at the Outlets and Marketplace than they do Downtown, and Leesburg-area residents also spend more, per person, shopping at the Outlets and Marketplace than they do Downtown.

Downtown's users give it very high marks for customer service and overall appearance. On business hours and product selection their views are mixed, with Leesburg-area residents surveyed at the Outlets and Marketplace expressing predominantly negative views about the Downtown on these issues. Area-resident views about Downtown parking are also mixed, with persons surveyed Downtown expressing mostly positive views and persons surveyed at the Outlets and Marketplace expressing mostly negative views on Downtown parking.

Survey respondents and focus-group participants would like the Downtown to have more restaurants with good food (particularly ethnic food), more moderate prices, and more outdoor dining options. They also want more entertainment options, moderately-priced clothing stores, convenience retail (especially for nearby residents and workers), and family-oriented attractions. They also expressed strong support for the development of a performing arts center Downtown.

Downtown's Key Strengths, Weaknesses, Opportunities & Threats

Strengths: Downtown's key economic strengths are its stable business base, comprised largely of government workers, its signature restaurants (Lightfoot and Tuskie's), and several shops that draw customers from throughout the region. Its most important physical assets are its historic physical fabric and small-town ambience, as well as its beautiful historic neighborhoods, attractive modern subdivisions and green spaces that surround it. It suffers little from social problems such as crime, it enjoys a generally positive image in the wider community and it has three business organizations dedicated to improving and enhancing it.

Weaknesses: Downtown's key weakness is that its retail offerings do not adequately serve its primary and secondary markets, and several of its restaurants and shops are geared primarily to serving the vacation-tourist market, which cannot be attracted in numbers large enough to make these businesses thrive. Another weakness is the heavy flow of automobile traffic through the heart of the Downtown, which undermines pedestrian comfort. Other weaknesses include the lack of a business placement scheme that promotes pedestrian browsing, as too many business and professional services are interspersed with restaurants and retail shops. Parking remains a problem, particularly for suburban residents.

Downtown lacks an official welcome center, its cultural attractions appear to be under-marketed, and Downtown merchants do not aggressively cross-market each other's businesses. The historic-district architectural review process appears to some would-be developers to be unclear, sometimes arbitrary, and of unpredictable length.

Opportunities: Downtown has several opportunities for economic growth and renewal. The region's population continues to grow very rapidly. It is a highly educated, relatively youthful and well to-do population that can and will support more high-quality restaurants in the historic district, as well as housing, convenience and specialty retail, and entertainment options in both the Old and Historic District and the Crescent District. The market for performing arts, fine arts and arts education is growing at a healthy rate.

The region is an excellent location for some medical- and information-technology businesses. The smaller, start-up segments of these industries would find Downtown Leesburg – including both the Crescent District and the Old and Historic District – an excellent location. These are high value-added businesses with generally well-paid workers who would increase the demand for dining and entertainment options Downtown. Such amenities, plus other services, such as wireless internet infrastructure, would make the Downtown even more enticing for this dynamic industry segment.

Threats: Threats to Downtown's future viability include the growing competition from "new-urbanist" shopping centers and lifestyle centers that increasingly attract Leesburg-area residents who cannot find the retail, dining and entertainment options that they want Downtown. Another important threat is the possible loss of an employment base, if County workers leave and are not replaced with high value-added activities that bring workers and revenues into the Downtown.

Recommendations for Downtown Enhancement

The Leesburg Town government must focus the community's attention and prioritize action steps to move the Downtown forward. Yet, the community's ability to build upon its strengths and seize new opportunities, while overcoming weaknesses and addressing threats, will depend upon its ability to craft strong partnerships between Town government, private property owners and developers, retailers and restaurateurs, and non-profit organizations. Leaders of these groups must step forward in a spirit of cost-sharing and compromise for mutual benefit. The following recommendations, organized along the lines of the Main Street® program's four-point framework (economics, design, promotion & marketing, and organization), are some of the most important ones that Town government should play a major role in organizing, and which public-private partnerships should carry out.

Economic Initiatives:

- Maintain a diverse array of mutually supportive uses, including:
    - Government and professional services, which are recession-resistant,
    - Dynamic sectors of the economy (such as small, knowledge-intensive businesses),
    - Apartment and condominium housing in the historic and Crescent districts,
    - Convenience retail and services for workers and primary-market residents,
    - Dining and entertainment options that serve a variety of market segments, especially residents in the primary and secondary market areas, and
    - Cultural and historic attractions.

Physical Initiatives:

- Implement The Crescent District Master Plan as soon as possible.
- Calm the traffic at key intersections in the Old and Historic District.
- Improve Downtown parking for residents coming from outside the town.
- Create a more "browser-friendly" shopping environment by locating business and professional services to the periphery.
- Create more "street-friendly" restaurants and shops, by implementing recommendations in The Alley: Public Space Improvements Conceptual Study, by opening restaurant facades to the street, and by making other streetscape improvements that would encourage more outdoor dining and pedestrian traffic.

Promotion & Marketing Initiatives:

- Re-establish a Leesburg-Loudoun Welcome and Information Center.
- Market Downtown establishments more aggressively through merchant "cross-marketing" and through customer incentives in the secondary (suburban) trade area.

- Consider crafting “experience-package tours” (excursions) for some of Downtown’s cultural attractions, targeted to specific market niches, such as senior citizens living in the Leesburg area or Western Europeans visiting Washington, DC.

Organization Initiatives:

- Streamline the development-review process, especially the Board of Architectural Review process, and establish a one-stop-shop or ombudsman function to smooth all aspects of development review.
- Recruit new businesses that will serve Downtown’s primary and secondary markets, and require them to have viable business plans and to maintain agreed-upon operating standards.
- Adjust the operating hours of related or complementary businesses to better serve the needs of Downtown’s primary and secondary markets, while retaining the patronage of the smaller vacation-tourist market. This may mean shifting all relevant businesses to a Noon-to-Nine schedule, but careful experimentation will be necessary to find the schedule that best meets the needs of Downtown’s potential users.

Introduction

As part of its efforts to enhance the historic Downtown core, the Town of Leesburg commissioned Virginia Commonwealth University to conduct an analysis of the market for Downtown Leesburg. Through multiple methods of inquiry, the study sought to describe and understand who comes to Downtown Leesburg, where they live, when they prefer to come Downtown, why they come Downtown, the purposes of their visits, their evaluation of the experience when they are there, and what changes in the Downtown might cause them to visit more often. The study also sought to understand who goes elsewhere to shop – specifically, who goes to the Leesburg Corner Premium Outlets and to the Lansdowne Marketplace – why they go there, and how they compare various aspects of these venues with their experience Downtown. The study supplemented and compared these views with those of Downtown-area residents and other stakeholders.

The tools used to conduct this research include analysis of 1,423 shopper zip-code residences collected by 11 Downtown businesses in June 2007, on-the-street intercept surveys of 240 shoppers conducted Downtown, at Leesburg Corner Premium Outlets and at Lansdowne Marketplace in July 2007, three one-hour focus-group discussions conducted with persons who live near the Downtown or who were participating in activities near Downtown in August 2007, and 25 in-depth interviews conducted with merchants and property owners, real-estate brokers, government officials and museum managers in August 2007. Demographic statistics, as well as area real-estate markets, were also studied to help identify market niches where Downtown can compete with the ever-expanding cornucopia of retail and service offerings nearby.

These methods have yielded a rich picture of Downtown's current strengths, weaknesses and opportunities for enhancement, as well as threats to Downtown's viability. Many of these findings and suggestions for improvement complement or reinforce recommendations made in recent forums and studies, which are listed in the Secondary Sources section at the end of this report. What is most distinctive about this study is the detailed picture of the current and potential users of Downtown and other shopping areas that it affords. Accordingly, the bulk of this report focuses on describing that population and its views, as revealed primarily through shopper-intercept surveys and focus-group discussions.

The shopper-intercept surveys were conducted over a two-week period in July 2007, when the weather was mild and, it was assumed, the survey population would include a mix of area residents, Downtown workers, and vacation-tourists visiting from outside the Leesburg area.

The report is divided into the following sections. Section 1 describes the population who uses the Downtown and the zip codes where they reside. Section 2 describes the frequency of their use of the Downtown, as well as their preferred days and times for shopping there. Section 3 describes the reasons why people go Downtown and the amount of money they typically spend there. Section 4 describes their evaluation of the experience they have when they are there and compares these experiences with their experiences at Leesburg Corner Premium Outlets and the Lansdowne Marketplace. Section 5 describes the changes or improvements that they believe would bring them Downtown more often. Section 6 summarizes the key strengths, weaknesses, opportunities and threats facing the Downtown. Section 7 provides recommendations of ways to enhance the Downtown. Sections 6 and 7 also incorporate the views of the 25 merchants, owners and other stakeholders interviewed in August.

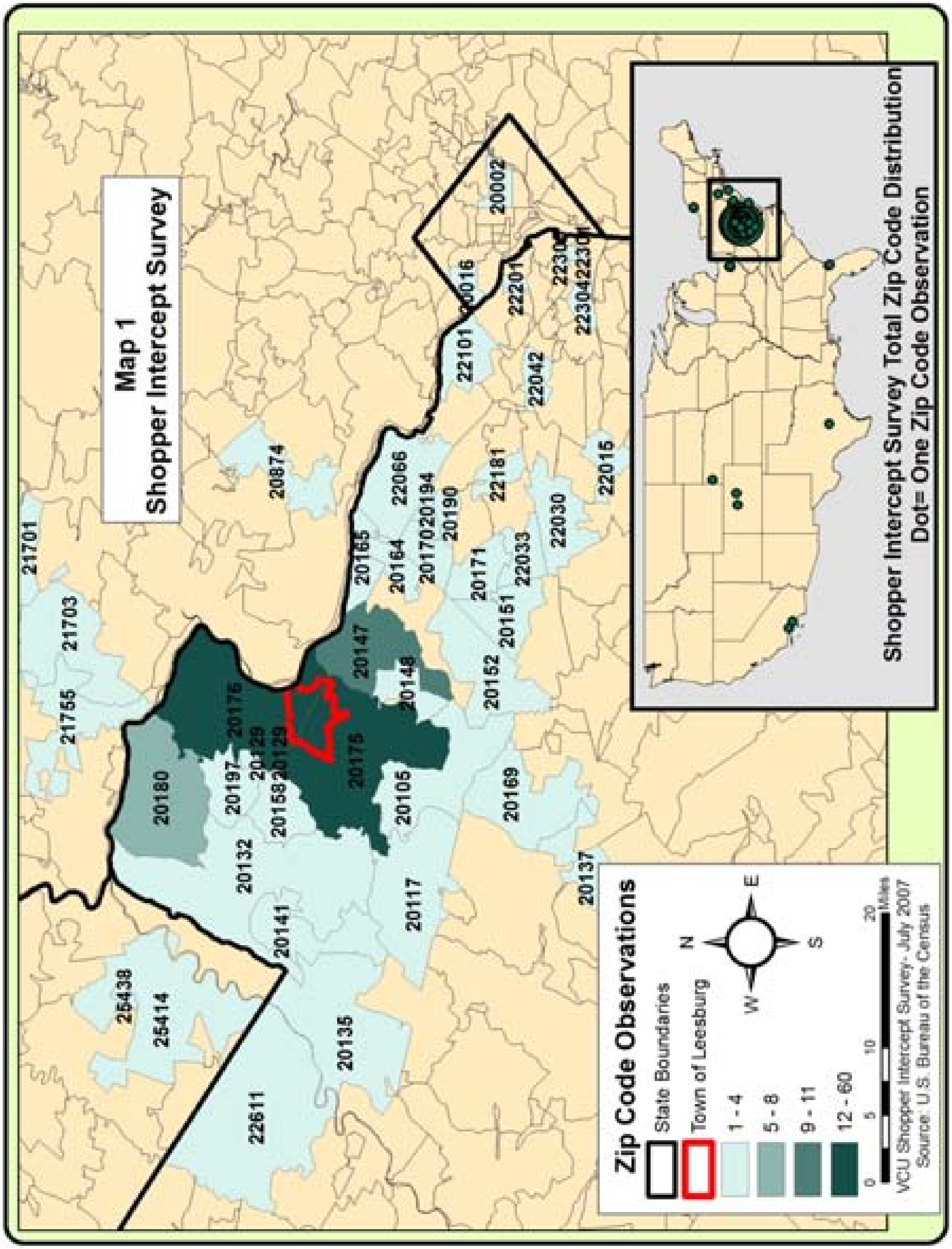
What is Downtown?

A word about the definition of "Downtown" is in order. Traditionally, Leesburg has defined its downtown as the commercial area within the Old and Historic District. In recent decades, however, commercial activity has spread outward to the south and east of this district. Such expansion, which is typical of healthy downtowns, is recognized in The Crescent District Master Plan of June 2006. Accordingly, we used Catoctin Circle as the southern and eastern boundary of the Downtown, and focus-group participants acknowledged this as an appropriate boundary, since many of them use the stores and services throughout this area. Nevertheless, survey respondents and even focus-group participants generally referenced the historic district when answering specific questions. For most of this report, therefore, "Downtown" means the area in or near the historic district, but as will become clear, the larger area, including the Crescent District, is what the Downtown is becoming.

1. Who Comes Downtown?

This section describes the age, gender, household income and household structure, and zip code of residence of persons surveyed in the Downtown, and contrasts it with persons surveyed at the Leesburg Corner Premium Outlets and Lansdowne Marketplace.

Zip Codes of Residence: Downtown's primary user group lives in or near the Town of Leesburg. As Map 1 shows, by far the most frequently-named residential zip codes for persons surveyed at all three locations are 20176 and 20175, the two zip codes in which the Town of Leesburg is located. These two zip codes, together with zip codes 20147 and 20180, account for the vast majority of the 241 persons surveyed at the three locations in July. Moreover, most of those surveyed Downtown also go to the Outlets and Marketplace and most of those surveyed at the Outlets and Marketplace go Downtown on occasion.

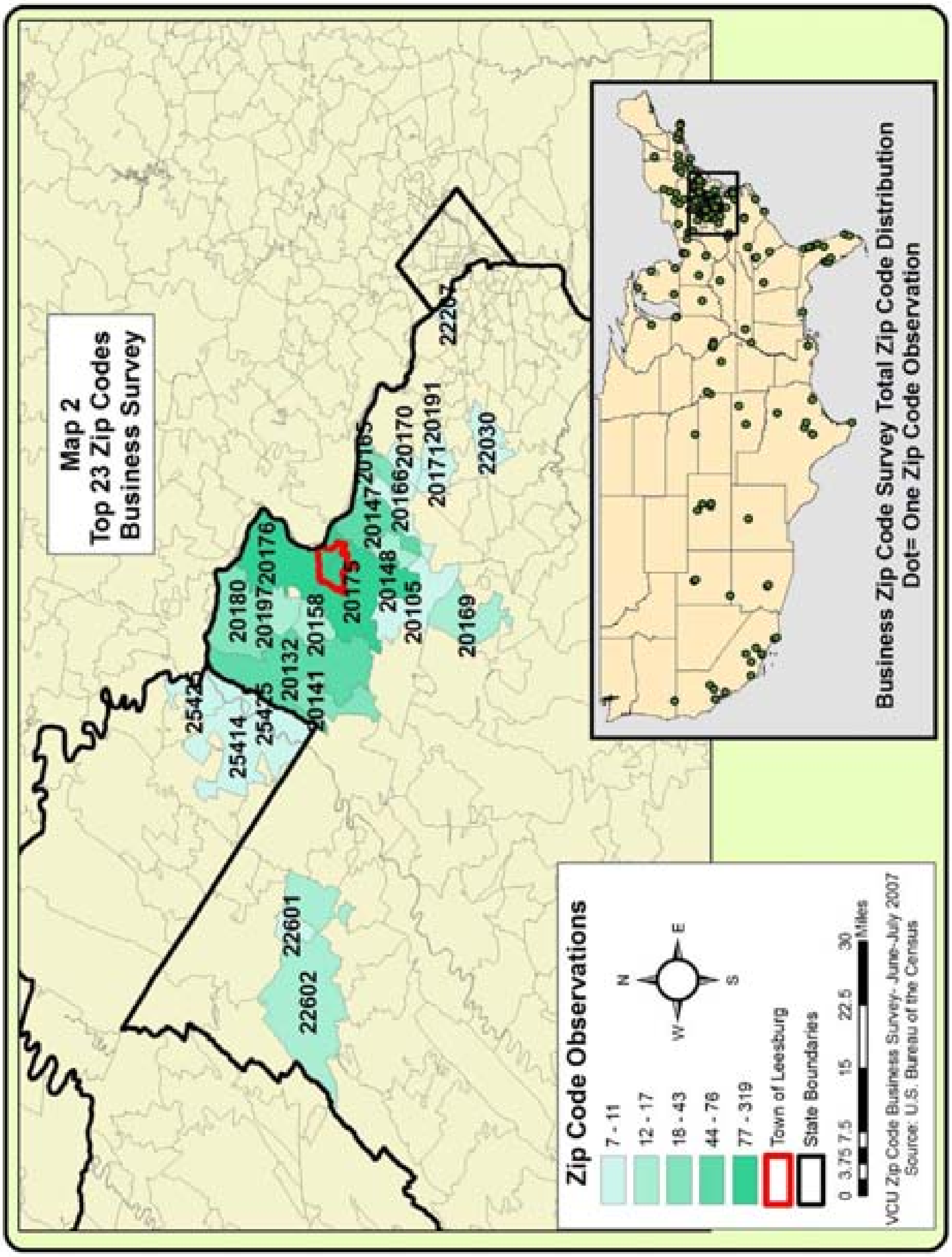

Map 1
Shopper Intercept Survey
21701
21703
21755
20874
20180
20176
20197
20129
20158
20175
20105
20132
20141
20117
20147
20148
20152
20169
20137
20165
20164
20170
20194
20066
20190
20171
20151
20033
22030
22181
22015
22042
22101
20016
22201
22304
20002
25438
25414
20135
22611
Zip Code Observations
State Boundaries
Town of Leesburg
1 - 4
5 - 8
9 - 11
12 - 60
N
E
S
W
0
5
10
20
Miles
VCU Shopper Intercept Survey- July 2007
Source: U.S. Bureau of the Census
Shopper Intercept Survey Total Zip Code Distribution
Dot= One Zip Code Observation

Still, distinctions must be made among Downtown's primary users. The most important of these is that between those who live in or near the Town of Leesburg (within zip codes 20175 and 20176) and many of those who live further away. Those who live close to the Downtown are there because they want to live in or near a small, historic, pedestrian-oriented downtown with independently-owned shops and restaurants. These persons are Downtown's staunchest allies, but also sometimes its strongest critics. The views of this group differ, on some issues, from those of the persons who live outside the Downtown area but within a 30-minute drive. Their purpose for coming Downtown is typically very specific – a children's program at Ida Lee Park, an occasional dinner at Lightfoot's, an Acoustics on the Green concert, a stroll with an out-of-town guest. Their support of the Downtown is less deep-seated than that of closer-in residents and they are more easily put off by perceived inconveniences.

Sixty-two respondents to the shopper-intercept survey identified themselves as "visitors from out of town." Analysis of their zip codes, however, revealed that less than one third of these persons live further than 100 miles from Downtown Leesburg. Thus, it is not surprising that 80% stated that they were planning to stay in the area for only one day. In short, these occasional visitors are regional residents who use Downtown Leesburg much as people in other regions use the downtowns of their older central cities. Nevertheless, since they were asked to answer special tourism-related questions, they are called "out-of-town visitors" in this report and their responses are treated separately from the 178 persons who identified themselves as shoppers or workers who live in the Leesburg area.

Map 1 reveals two more important geographic facts – the importance of the Potomac River as a physical market boundary to the north, and the roughly 50-mile east-to-west extent of Downtown's primary and secondary trade areas.

Map 2 displays the results of a survey of customer residential zip codes collected by 11 Downtown merchants in late June and early July of 2007. During the two-week survey period, the merchants collected 257 unique zip codes located throughout the United States from 1,423 shoppers. Yet, as Map 2 indicates, the most frequently cited 23 zip codes, which account for 74% of the 1,423 customers, are very similar to those in Map 1, and zip codes 20175 and 20176 account for 44% of all shoppers. Some businesses draw slightly more from the western part of the Downtown's secondary trade area, while others draw slightly more from the south or east. These areas should be viewed as beachheads upon which a broader Downtown market expansion strategy could be based. (The Appendix includes income and household profiles for



Map 2
Top 23 Zip Codes
Business Survey
Zip Code Observations
7 - 11
12 - 17
18 - 43
44 - 76
77 - 319
Town of Leesburg
State Boundaries
N
E
S
W
0 3.75 7.5 15 22.5 30 Miles
VCU Zip Code Business Survey- June-July 2007
Source: U.S. Bureau of the Census
22602
22601
25414
20180
20197
20176
20132
20158
20175
20141
20148
20147
20166
20165
20170
20171
20191
20105
20169
22030
22207
Business Zip Code Survey Total Zip Code Distribution
Dot= One Zip Code Observation

each of the most frequently cited zip codes from the zip-code survey, as well as nearby zip codes that were not mentioned in the survey, but which could also be considered for market expansion.) Maps 1 and 2, therefore, convey an important message. Downtown's primary market is the residents of the Town of Leesburg and its secondary market is Loudoun County and the "greater Leesburg region." Visitors who come to Leesburg from far away are few in number and, insofar as our surveys could discern, generally are persons who are visiting friends or relatives nearby or who are attending another event in the region and who come Downtown for a brief diversion.

Age Profile: Downtown's primary user group is middle aged. Over half of the persons surveyed Downtown who described themselves as residents of the Leesburg/Loudoun area are between the ages of 41 and 64, as indicated in Table 1. The remainder is distributed fairly evenly between the ages of under-20 (older teenagers) to 40 years old. Senior citizens are virtually absent from this user group. This profile contrasts somewhat with the younger ages of area residents surveyed at the Leesburg Corner Premium Outlets or at Lansdowne Marketplace, over half of whom are between the ages of 20 and 40, and the rest of whom are distributed fairly evenly between the ages of under-20 and 41 to 64. Among those who describe themselves as visitors from out of town, by contrast, no one reported an age under 20 and the rest reported ages spread fairly evenly from 20 to over 65, with somewhat more in the 51 to 64 range.

Table 1 Shopper Ages

	Area Residents Downtown		Area Residents Outlets & Marketplace		Visitors All Locations	
Under 20	14	14%	9	12%	0	0%
20-30	12	12%	27	36%	11	18%
31-40	18	18%	16	21%	13	21%
41-50	29	28%	10	13%	9	15%
51-64	27	26%	11	15%	21	34%
65 and over	2	2%	3	4%	7	11%
no answer	0	0%	0	0%	1	2%
Total	102	100%	76	101%	62	98%

Gender: Two thirds of Downtown shoppers are female and slightly more than half of the persons surveyed at the Outlets or Marketplace are female. About 60 percent of the visitors to the Downtown are females, as shown in Table 2.

Table 2 Shopper Genders						
	Area Residents Downtown		Area Residents Outlets & Marketplace		Visitors All Locations	
Male	35	34%	35	46%	25	40%
Female	67	66%	41	54%	36	58%
No Answer	0	0%	0	0%	1	2%
Total	102	100%	76	100%	62	100%

Household Income: Almost two-thirds of the Downtown visitors who live in the area (and who answered the survey question about household income) have an annual household income higher than $100,000. By contrast, only a little more than one third of Outlets or Marketplace shoppers reported incomes this high, but over half of the out-of-town visitors did so. See Table 3.

Table 3 Shopper Annual Household Incomes						
	Area Residents Downtown		Area Residents Outlets & Marketplace		Visitors All Locations	
Less than $50,000	6	6%	11	14%	6	10%
$50,000-$75,000	11	11%	12	16%	9	15%
$75,000-$100,000	15	15%	15	20%	8	13%
$100,000-$150,000	31	30%	9	12%	18	29%
Over 150,000	28	27%	18	24%	14	23%
No Answer	11	11%	11	14%	7	11%
Total	102	100%	76	100%	62	100%

Household Structure: No particular type of family structure is predominant among persons who come Downtown or to the other two centers. Over half of the area residents surveyed Downtown stated that they are members of families with children, but the remainder of this group is split about evenly between married couples with no children and single persons. Among local residents surveyed at the Outlets and Marketplace, one quarter are single and the remainder are split evenly between families with children and married couples with no children. Over 40% of the visitors are in married couples with no children, with the remainder split evenly between singles and families with children. See Table 4.

Table 4 Shopper Household Structure						
	Area Residents Downtown		Area Residents Outlets & Marketplace		Visitors All Locations	
Family with Children	56	55%	27	36%	18	29%
Couple, no children	24	24%	29	38%	25	40%
Single	22	22%	20	26%	18	29%
No Answer	0	0%	0	0%	1	2%
Total	102	100%	76	100%	62	100%

2. When Do They Come Downtown?

Frequency of Visits: Over one third of the persons who come Downtown do so at least once per week. An additional 13% come daily and a further 25% come Downtown on a monthly basis. As noted above, the focus-group discussions revealed that some persons live in or near the historic district in order to be able to walk to shops there or on Catoctin Circle and they purposely try to support the Downtown. As one put it: "I go out of my way to use it every day." See Table 5.

Table 5 Frequency of Visits Downtown

	Area Residents Downtown		Area Residents Outlets & Marketplace	
Daily	13	13%	7	9%
Weekly	36	35%	10	13%
Monthly	26	25%	30	39%
Couple times per	17	17%	21	28%
Once a year	5	5%	2	3%
Other	5	5%	6	8%
total	102	100%	76	100%

About 47% of the visitors from out-of-town surveyed Downtown stated that this was their first time Downtown, 22% stated that they visit once per year, and 31% stated that they come Downtown multiple times each year. See Table 6. (Shoppers at the Outlets and Marketplace visit there somewhat less frequently than those surveyed Downtown come to the Downtown.)

Table 5A
Frequency of Visits per Year by Out-of-Town Visitors

	To Downtown		To Outlets/Marketplace	
Multiple Times	14	31%	7	41%
Once per Year	10	22%	3	18%
First Time	21	47%	6	35%
No Answer	0	0%	1	6%
Total	45	100%	17	100%

Preferred Days to Shop: Of the shoppers surveyed Downtown, about 53% stated a preference for coming Downtown on weekdays (this group includes both Downtown workers and local residents), about 31% prefer to come on weekends, and about 15% shop on both weekends and weekdays. It should be noted that surveys were conducted on both weekdays (Thursdays and Fridays) and weekends (Saturdays and Sundays) in July. (Shoppers intercepted at the Outlets and Marketplace split about evenly between weekend and weekday shopping preferences.)

Table 6 Preferred Days to Shop				
	Area Residents Downtown		Area Residents Outlets & Marketplace	
Weekdays	54	53%	32	42%
Weekends	32	31%	31	41%
Both	15	15%	12	16%
None	1	1%	1	1%
Total	102	100%	76	100%

Preferred Times of Day to Shop: Shoppers surveyed Downtown expressed a preference for shopping in the afternoon (48%) and morning (25%). Only 14% of this group expressed a clear preference for evening shopping. However, it should be noted that, except for the attendees at the Acoustics on the Green concert on July 14, who were surveyed between 6:00 and 7:00 PM, shoppers were not surveyed in the evening, so we did not survey persons who would only shop in the evening. In fact, even shoppers surveyed Downtown in the daytime cited the apparent lack of evening hours as a problem with the Downtown, thus contradicting, to some extent, the stated preference for daytime hours. Focus-group participants, many of whom live near the Downtown, complained that stores and even most restaurants close earlier than they would like. It should also be noted that local residents surveyed at the Outlets and Marketplace expressed a strong preference for evening (37%) and afternoon (32%) shopping hours, followed by morning hours (18%). If the Downtown is to attract more of this market, a shift in hours may be necessary. This issue is addressed in Section 7 of this report.

Table 7 Preferred Times of Day to Shop				
	Area Residents Downtown		Area Residents Outlets & Marketplace	
Morning	26	25%	14	18%
Afternoon	49	48%	24	32%
Evening	14	14%	28	37%
All Times	4	4%	2	3%
Morning/Afternoon	7	7%	2	3%
Afternoon/Evening	2	2%	3	4%
No Preference	0	0%	3	4%
	102	100%	76	100%

3. Why Do They Come Downtown?

And Where Do They Go?: Downtown Leesburg's primary attraction appears to be restaurants, followed by shopping. The single-most prevalent activity that brings Leesburg-area residents Downtown is eating (39% of respondents mentioned this), followed by shopping (23% of respondents mentioned this). These are followed, in decreasing order of prevalence, by work (9%), using a professional service, such as legal services (8%) and using a personal service (7%). Note that 10% of these respondents mentioned going to a concert as a reason for coming Downtown. This answer reflects the fact that attendees at the Acoustics on the Green concert on July 14 were included in the survey population. (Respondents were allowed to choose more than one reason for coming Downtown.)

Local residents surveyed at the Outlets or Marketplace reported similar reasons for coming Downtown on occasion – a meal (37%), shopping (28%), a professional service (17%), or other activities, such as exercise (7%), seeing a movie (4%) or "people-watching" (4%). Of the visitors from out-of-town who had been Downtown, 71% reported that a meal was their primary reason for coming Downtown, and 14% each mentioned shopping, personal service, and "people-watching" as their reasons.

Table 8 Purposes of Trip

	Area Residents Downtown		Area Residents Outlets & Marketplace	
Shopping	24	24%	21	28%
Meal	40	39%	28	37%
Personal Service	7	7%	3	4%
Professional Svervice	8	8%	13	17%
People-Watch	4	4%	3	4%
Other*	41	40%	20	26%
Number of Respondents	102		76	
*Other				
Work	9	9%	0	0
Concert	10	10%	0	0
Walking Dog	3	3%	0	0
Hanging Out	2	2%	0	0
Exercise	0	0	5	7%
Movie	0	0	3	4%

Respondents were permitted to choose more than one purpose.

Asked why they would shop Downtown instead of at the Outlets or Marketplace, local residents intercepted at the Outlets or Marketplace cited restaurants (24%), specialty goods (25%) and a higher quality retail environment (25%), by which they meant the historic fabric of the Downtown or the conduciveness of the area for casually browsing, strolling and relaxing. In addition, 11% cited antiques, 8% cited movies, and 7% cited convenience as Downtown's competitive advantages. The out-of-town visitors surveyed at the Outlets or Marketplace who came Downtown named the following Downtown advantages: restaurants, specialty goods, better quality retail environment, antiques, and parades/festivals/holidays. These responses are displayed in Table 8A.

Table 8A Why Shop Downtown Instead of at Leesburg Outlets or Lansdowne Marketplace		
Restaurants	18	24%
Convenience	5	7%
Specialty Goods	19	25%
Better Quality Retail Environment	19	25%
Antiques	8	11%
Parades/Festivals/Holidays	2	3%
More Stores than Lansdowne	3	4%
Movies	6	8%
Other	16	21%
Number of Respondents	76	

Respondents were permitted to give more than one answer.

The restaurants or shops that Leesburg-area residents visit when they come Downtown are Lightfoot (23%), Market Street Coffee (21%), Tuscarora Mill/Tuskie's (18%), Leesburg Restaurant (17%), the Leesburg Vintner and China King (both 12%), Antique Emporium and Tally Ho (both 11%), and Black Shutter (10%). Focus-group discussions and interviews revealed that Downtown workers and some nearby residents tend to frequent the lighter, quicker eateries, such as Leesburg Restaurant, China King, Courthouse Deli, Puccio's, Mighty Midget, Nido's, and the West Loudoun Street Café, whereas residents of the outlying Leesburg area typically come for dinner and go to Lightfoot or Tuskie's.

Visitors from out-of-town cited Antique Emporium (22%), Black Shutter Antiques (18%), Lightfoot Restaurant (16%), Old Country Peddler and Reign of Cats and Dogs (each 9%), and Esoterica and the Leesburg Vintner (each 7%) as their primary destinations. (Respondents were permitted to name more than one destination.) Table 9 shows these and other destinations of area residents and visitors from out-of-town.

Table 9 Places Visited Downtown	Area Residents Downtown		Visitors to Downtown	
Antique Emporium	11	11%	10	22%
Black Shutter	10	10%	8	18%
China King	12	12%	0	0%
Esoterica	5	5%	3	7%
Farmer's market	3	3%	0	0%
King's Court Tavern	2	2%	0	0%
Lavender Moon	2	2%	0	0%
Leesburg Restaurant	17	17%	0	0%
Lightfoot	23	23%	7	16%
West Loudoun Street Café	3	3%	0	0%
Market Street Coffee	21	21%	0	0%
Old Country Peddler	1	1%	4	9%
Reign of Cats and Dogs	3	3%	4	9%
Resourceful Woman	4	4%	0	0%
Safeway	5	5%	0	0%
Tally Ho	11	11%	0	0%
Tuscarora Mill	19	19%	0	0%
Leesburg Vintner	12	12%	3	7%
Number of Respondents	102		45	

Respondents were permitted to give more than one answer.

Downtown Attractions: In addition to its historic physical fabric, restaurants and shops, Downtown Leesburg also has a number of cultural offerings that might attract visitors. Out-of-town visitors were asked if they had visited or planned to visit these attractions. As Table 9A shows, of the ones mentioned by the surveyors, only Market Station, the Loudoun Museum, and Dodona Manor were visited by more than a couple of the respondents. It should be noted that a few focus-group participants stated that they had visited a couple of the attractions, especially the Thomas Balch Library.

Table 9A Number of Out-of-Town Visitors Who Visited Each Attraction		
Loudoun Museum	7	16%
Thomas Balch Library	1	2%
Dodona Manor	6	13%
W&OD Trail	2	4%
Market Station	9	20%
Tally-Ho Movie Theatre	1	2%
No Answer	1	2%
None Visited	18	40%
Number of Respondents	45	

How Much Do They Spend?: Survey respondents were asked to state how much they had spent, or would yet spend, on the day on which they were surveyed. Over half of the area residents stated that they would spend between $1 and $100 shopping Downtown, but 29% stated that they would not spend any money shopping. Over three-fourths (77%) of the respondents stated that they would spend between $1 and $100 dining, but 20% stated that they would not spend any money dining. These are the only significant expenditures that area residents reported, as Table 10 shows.

Out-of-town visitors spend somewhat more Downtown than do residents. Of those who came Downtown, 42% stated that they would spend $26 to $100 shopping and 31% stated that they would spend $100 to $500 shopping, but 13% said they would spend nothing. As for dining, 24% stated that they would spend $1 to $25, 53% stated that they would spend $26 to $100, and 13% said they would spend $100 to $500. Only a few visitors stated that they would spend anything on Downtown cultural attractions – 80% stated that they would not spend anything, 7% stated that they would spend $1 to $25 and 7% stated that they would spend $26 to $100. Similarly, 84% stated that they would not spend anything on lodging and 13% said they would spend $100 to $500 in this category.

By contrast and as one might expect, Leesburg-area residents shopping at the Outlets or Marketplace reported spending substantial sums on shopping and dining, but nothing on lodging or attractions. On shopping, 21% reported spending $26 to $100, 15% reported spending $100 to $500, and 7% spent over $500. Since the Marketplace has little retail, most of this spending can be attributed to the Leesburg Corner Premium Outlets. Dining expenditures were modest, but almost everyone spent something: 67% spent $1 to $25 and 28% spent $26 to $100.

For out-of-town visitors to the Outlets and Marketplace, the following expenditures were reported: On shopping, 24% spent $26 to $100 and 41% spent $100 to $500, while 24% spent nothing. On dining, 71% spent between $1 and $25, and 29% spent $26 to $100. On attractions, 88% spent nothing, 6% spent $1 to $25 and 6% spent $26 to $100. On lodging, all respondents stated that they would not spend anything. See Table 10A.

From these data, it is possible to construct a rough, back-of-the-envelope comparison of spending per person. People spend more per person Downtown on dining, but they spend more per person at the Outlets and Marketplace on shopping than they do Downtown. Out-of town visitors spend more per person than do Leesburg-area residents.

Table 10 Amounts Spent Downtown by						
	Area Residents			Out-of-Town Visitors		
Shopping	$0	30	29%	$0	6	13%
	$1-$25	25	25%	$1-$25	5	11%
	$26-$100	34	33%	$26-$100	19	42%
	$100-$500	12	12%	$100-$500	14	31%
	over $500	1	1%	over $500	0	0%
	no ans.	0	0%	no ans.	1	2%
Total		102			45	
Dining/Food	$0	20	20%	$0	2	4%
	$1-$25	38	37%	$1-$25	11	24%
	$26-$100	40	39%	$26-$100	24	53%
	$100-$500	4	4%	$100-$500	6	13%
	over $500	0	0%	over $500	0	0%
	no ans.	0	0%	no ans.	2	4%
Total		102			45	
Attractions	$0	97	95%	$0	36	80%
	$1-$25	3	3%	$1-$25	3	7%
	$26-$100	2	2%	$26-$100	3	7%
	$100-$500	0	0%	$100-$500	1	2%
	over $500	0	0%	over $500	0	0%
	no ans.	0	0%	no ans.	2	4%
Total		102			45	
Lodging	$0	102	100%	$0	38	84%
	$1-$25	0	0%	$1-$25	0	0%
	$26-$100	0	0%	$26-$100	0	0%
	$100-$500	0	0%	$100-$500	6	13%
	over $500	0	0%	over $500	0	0%
	no ans.	0	0%	no ans.	1	2%
Total		102			45	

Table 10A Amounts Spent at Lansdowne Marketplace & Leesburg Outlets by						
	Area Residents			Out-of-Town Visitors		
Shopping	$0	42	55%	$0	4	24%
	$1-$25	1	1%	$1-$25	1	6%
	$26-$100	16	21%	$26-$100	4	24%
	$100-$500	11	14%	$100-$500	7	41%
	over $500	5	7%	over $500	1	6%
	no ans.	1	1%	no ans.	0	0%
Total		76	100%		17	100%
Dining/Food	$0	1	1%	$0	0	0%
	$1-$25	50	66%	$1-$25	12	71%
	$26-$100	21	28%	$26-$100	5	29%
	$100-$500	3	4%	$100-$500	0	0%
	over $500	0	0%	over $500	0	0%
	no ans.	1	1%	no ans.	0	0%
Total		76	100%		17	100%
Attractions	$0	73	96%	$0	15	88%
	$1-$25	1	1%	$1-$25	1	6%
	$26-$100	0	0%	$26-$100	1	6%
	$100-$500	0	0%	$100-$500	0	0%
	over $500	0	0%	over $500	0	0%
	no ans.	2	3%	no ans.	0	0%
Total		76	100%		17	100%
Lodging	$0	73	96%	$0	16	94%
	$1-$25	1	1%	$1-$25	0	0%
	$26-$100	0	0%	$26-$100	0	0%
	$100-$500	0	0%	$100-$500	0	0%
	over $500	0	0%	over $500	0	0%
	no ans.	2	3%	no ans.	1	6%
Total		76	100%		17	100%

4. How Do They Evaluate Their Experience Downtown?

There is substantial agreement among Leesburg-area residents surveyed Downtown, area residents surveyed at the Outlets and Marketplace, and visitors from out-of-town on Downtown's strengths and weaknesses. Asked to evaluate their experience Downtown on a five-point scale as excellent, good, neither good nor bad, bad, or poor, all three groups gave the Downtown very high marks on customer service and overall appearance. These evaluations are reflected in Tables 11 (customer service) and 12 (overall appearance).

Table 11 How Shoppers Rate Downtown on Customer Service						
	Residents Surveyed Downtown		Residents Surveyed Outlets/Marketplace		Visitors from Out-of-Town	
Excellent	58	57%	19	25%	33	53%
Good	33	32%	28	37%	13	21%
Neither Good nor Bad	9	9%	10	13%	0	0%
Bad	1	1%	1	1%	0	0%
Poor	0	0%	0	0%	0	0%
No answer	1	1%	18	24%	16	26%
Total	102	100%	76	100%	62	100%

Table 12 How Shoppers Rate Downtown on Overall Appearance						
	Residents Surveyed Downtown		Residents Surveyed Outlets/Marketplace		Visitors from Out-of-Town	
Excellent	55	54%	24	32%	30	48%
Good	39	38%	26	34%	17	27%
Neither Good nor Bad	7	7%	13	17%	2	3%
Bad	1	1%	2	3%	0	0%
Poor	1	1%	0	0%	0	0%
No answer	0	0%	11	14%	13	21%
Total	102	101%	76	100%	62	100%

However, Leesburg-area residents gave the Outlets and Marketplace equally high marks for customer service (Table 11A) and even higher marks for overall appearance than they gave the Downtown (Table 12A).

Table 11A How Leesburg-Area Residents Rate Outlets or Marketplace on Customer Service		
Excellent	23	30%
Good	28	37%
Neither Good nor Bad	19	25%
Bad	1	1%
Poor	1	1%
No answer	4	5%
Total	76	100%

Table 12A How Leesburg-Area Residents Rate Outlets / Marketplace on Overall Appearance		
Excellent	27	36%
Good	35	46%
Neither Good nor Bad	12	16%
Bad	0	0%
Poor	0	0%
No answer	2	3%
Total	76	100%

Other aspects of the Downtown experience received less favorable marks. Although 16% of Leesburg-area residents surveyed Downtown rated business hours as excellent, 35% rated them as good and 33% rated them as neither good nor bad. Almost 12% of this group rated business hours as bad or poor. The predominant complaint is that stores are not open late enough. (As noted above, this result contrasts, somewhat, with this group's stated preference for morning and afternoon shopping hours, but it is consistent with other criticisms that Downtown lacks evening hours.) Area residents surveyed at the Outlets and Marketplace were even more critical, with about 23% rating Downtown's business hours as excellent or good and over 17% rating them as bad or poor. With this group as well, the most prevalent complaint is that Downtown stores are not open late enough.

Focus-group participants voiced the same concern, stating that Lightfoot and Tuskie's are the main restaurants, of the ones whose food and ambiance they like, that stay open well into the evening, so that they find themselves forced to go to Lansdowne or Sweetwater if they want to eat out. Some commended the Leesburg Vintner and Esoterica for staying open in the evenings as well. The thoughts of many focus-group participants are captured by the statement of one woman, that "[e]verything just seems to close up after 6:00. The lights go out and I don't feel safe going down there." It seems that area residents want to see more life and vitality generally in the Downtown after dark and this includes having shops stay open later. But their primary desire is that Downtown offer more moderately-priced restaurants (including family restaurants), whose food and ambiance they enjoy, and which are open until late in the evening. As discussed below, Leesburg-area residents also want more evening entertainment options Downtown.

On the positive side, 55% of visitors from out-of-town rated Downtown's business hours as very good or excellent and less than 5% rated them as bad or poor (but over 32% did not answer this question). Leesburg-area residents gave the Outlets and Marketplace much higher marks on business hours, with almost 79% rating them as excellent or good. (See Tables 13 and 13A.)

Table 13 How Shoppers Rate Downtown on Business Hours

	Residents Surveyed Downtown		Residents Surveyed Outlets/Marketplace		Visitors from Out-of-Town	
Excellent	16	16%	4	5%	16	26%
Good	36	35%	14	18%	18	29%
Neither Good nor Bad	34	33%	29	38%	5	8%
Bad	8	8%	11	14%	3	5%
Poor	4	4%	2	3%	0	0%
No answer	4	4%	16	21%	20	32%
Total	102	100%	76	100%	62	100%

Table 13A How Leesburg-Area Residents Rate Outlets / Marketplace on Business Hours		
Excellent	26	34%
Good	34	45%
Neither Good nor Bad	7	9%
Bad	4	5%
Poor	0	0%
No answer	5	7%
Total	76	100%

Table 14 depicts user ratings of Downtown's product selection. Almost 22% of Leesburg-area residents rated Downtown's product selection as excellent and 24% rated it as good, but 16% find product selection to be bad or poor. Specific complaints center mostly on a few restaurants that area residents find to be of poor quality, but also include the concern that there appears to be very little merchandise at moderate to middle prices. Area residents surveyed at the Outlets and Marketplace were even more critical: 22% rated Downtown's product selection as good or excellent, but 33% rated it as bad or poor; "not enough selection" is the most frequent complaint from this group.

Focus-group participants expressed similar views about the product selection (restaurant and merchandise offerings) Downtown. They offered high praise for most of Downtown's restaurants and eateries, but they bitterly criticized a few that, they claimed, serve bad food and charge high prices and which are not well-maintained. As far as shopping is concerned, focus-group participants praised several shops, such as the Leesburg Vintner. Some also commended the arts & crafts activities Downtown, and some noted that Downtown has become "an antiques destination," as one put it. But others cautioned against having too many antique stores, saying that nearby residents do not use them very often.

Focus-group participant attitudes about retail offerings are captured in the statement of one that "[t]here's no volume for anything." Or, as another put it: "When you get to Leesburg, there's nothing here." Another said: "The existing mix of shops doesn't match those of us who live here." Nor, in the view of focus-group participants, does it serve Downtown's primary workforce of County and Town workers and professionals, other than through the eateries mentioned above. And although nearby residents may want to purchase things in Downtown stores, they often find the prices too high. "Only Middleburg shops in Leesburg," as one person expressed it.

On the positive side, focus-group participants praised some Downtown amenities and activities, such as the WO & D Trail, the Acoustics on the Green concerts and the programs at Ida Lee Park and other summer activities. But they also stated that Downtown needs more of these activities. They like the Tally Ho Theater, but several questioned its focus on first-run films at the expense of more unusual offerings that the nearby market would support, such as performing arts and foreign films.

Among visitors from out-of-town, about 51% rated Downtown's product selection (restaurants and merchandise) as excellent or good, while only 3% rated it as bad. However, over 32% of the respondents did not answer this question.

Table 14 How Shoppers Rate Downtown on Product Selection

	Residents Surveyed Downtown		Residents Surveyed Outlets/Marketplace		Visitors from Out-of-Town	
Excellent	22	22%	8	11%	20	32%
Good	24	24%	8	11%	12	19%
Neither Good nor Bad	36	35%	20	26%	8	13%
Bad	13	13%	21	28%	2	3%
Poor	3	3%	4	5%	0	0%
No answer	4	4%	15	20%	20	32%
Total	102	100%	76	100%	62	100%

On this measure also, the Outlets and Marketplace came out on top, with about 65% of respondents rating them as excellent or good and about 8% rating them as bad or poor. See Table 14A.

Table 14A
How Leesburg-Area Residents Rate Outlets / Marketplace on Product Selection

Excellent	22	29%
Good	27	36%
Neither Good nor Bad	17	22%
Bad	4	5%
Poor	2	3%
No answer	4	5%
Total	76	100%

Parking is often perceived to be a problem in historic downtowns. Despite Leesburg's significant and commendable efforts to improve parking, some negative perceptions persist, especially among area residents who do not live in close proximity to Downtown. Area residents surveyed

Downtown reveal polarized attitudes about Downtown parking. Over 56% rated it as excellent or good, while 23% rated it as bad or poor. Asked to explain the negative ratings, respondents cited the following issues, in declining order of importance: a general shortage of parking, problems finding available street parking, problems finding their way in the garage or in finding convenient parking in the garage, and problems with parking signage.

Attitudes are even more negative among area residents surveyed at the Outlets or Marketplace. Over 21% found Downtown parking to be excellent or good, but over 47% rated it as bad or poor. The most prevalent complaints are a perceived shortage of parking overall, a perceived lack of parking or difficulty of parking in the street, problems finding the garage or finding parking spaces in the garage, and a perceived lack of signage indicating where available parking is located. Out-of-town visitors, by contrast, expressed satisfaction with Downtown parking. Over 53% found it to be excellent or good and only 3% found it to be bad. However, almost 26% of the respondents did not answer this question. Table 15 depicts these responses.

Table 15 How Shoppers Rate Downtown on Parking

	Residents Surveyed Downtown		Residents Surveyed Outlets/Marketplace		Visitors from Out-of-Town	
Excellent	26	25%	4	5%	23	37%
Good	32	31%	12	16%	10	16%
Neither Good nor Bad	13	13%	13	17%	11	18%
Bad	12	12%	17	22%	2	3%
Poor	11	11%	19	25%	0	0%
No answer	8	8%	11	14%	16	26%
Total	102	100%	76	100%	62	100%

The focus-group discussions cast some additional light on this issue. Participants who do not live in or near the historic district expressed the view that Downtown parking is inadequate. They cannot park on the street near the shops they wish to visit, they find it difficult to negotiate the parking garage on Market Street, and, at busy times, such as lunchtime, they cannot find a space in the garage. Focus-group participants who live closer to the Downtown, by contrast, find that the Market Street garage meets their needs – it is convenient and inexpensive, although sometimes, they perceive, business owners and employees take spaces that are normally reserved for patrons.

A number of factors may help to explain these findings. One may be the familiarity of the Downtown user with parking logistics and rules. Persons who know the Downtown parking system may be able to negotiate it fairly well, since the garage is centrally located and short-term parking there is essentially free, and since street meters have short time limits, which encourages quick turnover. For those who are accustomed to parking in suburban subdivisions and shopping malls, however, finding one's way to, and then around in, a small (albeit nicely designed) parking garage may seem too high a price to pay for shopping or dining Downtown. Parallel parking for these users may be a forgotten (or never learned) skill. It is possible that more way-finding signs would help those less familiar with Downtown parking. Bottom line: If deeper penetration of Leesburg's secondary market (suburban areas) is desired, future parking should be planned so that suburban drivers find it easy to use.

As one might expect, about 62% of Leesburg-area residents rated parking at the Outlets and Marketplace as excellent or good, but surprisingly, 12% rated it as bad or poor. See Table 15A.

Table 15A
How Leesburg-Area Residents Rate
Outlets / Marketplace on Parking

Excellent	22	29%
Good	25	33%
Neither Good nor Bad	19	25%
Bad	6	8%
Poor	3	4%
No answer	1	1%
Total	76	100%

5. What Should Be Changed or Added to Improve the Downtown?

All survey respondents were asked to identify improvements that would encourage them to use the Downtown more often. This was an open-ended question; no response categories were suggested. Table 16 displays their responses, which have been organized into broad categories. Although there is some variety among the suggestions, the dominant ones are for more restaurants and related requests, more moderately priced clothing, more convenience retail and more family-oriented attractions. These suggestions are combined with those of the focus-group participants in the discussion that follows.

Table 16 What Would Bring People Downtown More Often?	Residents Surveyed Downtown		Residents Surveyed Outlets/Marketplace		Visitors from Out-of-Town	
More Restaurants	14	14%	23	30%	4	6%
Better Restaurants & Outdoor Dining	15	15%	0	0%	2	3%
Clothing Stores	16	16%	9	12%	1	2%
Convenience Retail	15	15%	0	0%	0	0%
Improve Streetscape; Park/Playground	3	3%	4	5%	5	8%
More Bars or Clubs - Young Prof'ls	11	11%	7	9%	1	2%
Family-Oriented Attractions	7	7%	10	13%	1	2%
Bookstore	10	10%	0	0%	1	2%
Ice cream shop	2	2%	0	0%	3	5%
More antiques	3	3%	0	0%	3	5%
Specific Retailers (eg Abercrombie/Fitch)	19	19%	18	24%	5	8%
Other (historic walking trail, lower prices)	21	21%	9	12%	11	18%
Total surveyed	102		76		62	

Respondents were permitted to choose more than one new use or change.
Percentages reflect the percentage of respondents that mentioned a category.

<u>New Uses – Food-Related</u>: More suggestions fall into this category than any other. Several concern restaurants and other food-related uses. Area residents, in particular, opined that some restaurants whose food is, in their view, of poor quality should be replaced with a variety of higher quality restaurants, whose atmosphere is casual and whose prices are moderate. Indeed, a desire for more moderately-priced, good-quality restaurants came up numerous times in both surveys and focus groups. Specific suggestions include seafood and ethnic food and a good pub with live entertainment. Some would like to see more restaurants "of the caliber of Lightfoot's," as one person stated. One focus-group participant who lives near Downtown said: "We'd eat out every night if we could [find diverse restaurants in the Downtown that we liked.]" Residents of areas outside of Downtown Leesburg asserted that they and others would drive to Downtown Leesburg from Ashburn or Sterling for good restaurants because it is easier than driving eastward. A number of respondents mentioned a need for "nice, family restaurants" and restaurants that would cater to the growing retiree market in the area.

Other restaurant-related suggestions include al-fresco dining, a dinner-theater, and restaurants with live entertainment. Another suggestion is that a restaurant that features Loudoun agricultural products locate Downtown and perhaps develop an initiative with a culinary school that could co-locate with the restaurant.

Focus-group participants were specifically asked if they would like to see chain restaurants in the Downtown. Some residents of areas outside of Downtown (the suburban, secondary trade area) responded that they would have no objection to well-run chains and that such businesses might help the Downtown by generating foot-traffic for other businesses. However, respondents who live in Downtown's primary trade area (zip codes 20175 and 20176) expressed very strong opposition to this notion, arguing that it would destroy Downtown's independent-business character and diversity, and further erode their support for the Downtown. Note that focus-group participants were not explicitly asked if they would support locally-based chains but, judging from the conversations, it seems likely that they would support them, since their main concern appears to be to support locally-owned stores and restaurants, and to oppose absentee-owned "formula" businesses. On the other hand, insofar as the Crescent District is becoming part of the Leesburg Downtown, and since national chains are already present on Catoctin Circle, it may be appropriate to consider locating high-quality chains there, but the issue requires more study.

In addition to restaurants, both survey respondents and focus-group participants suggested that an ice cream shop and more bakeries locate in the historic commercial district. (It is possible that existing bakeries could satisfy this demand by expanding their offerings, extending their operating hours, or advertising more aggressively.) They also requested a non-chain convenience store that would sell food, newspapers and magazines, and some drug-store items, catering to nearby residents, Downtown workers, and even visitors from out-of-town.

New Uses – Other Retail: Survey and focus-group participants also requested women's clothing that is moderately priced, noting that the current offerings are too expensive for them. Several also stated that they would like to see another independent bookstore in town. Focus-group participants also mentioned a candy store, a toy store and a card store, adding that such stores would fit the "quaint feel" of Downtown Leesburg and be different from the offerings at suburban centers.

New Uses – Other Activities: Respondents also suggested more family-oriented uses (in addition to family-oriented restaurants), including youth entertainment, such as the popular Jammin' Java in Vienna and Paintball in Sterling. (Such uses might work well on or near Catoctin Circle.) Some suggested more outdoor recreation venues, such as tennis courts and softball fields, and several suggested more pottery and other arts education activities, including support for, or an increase in support for fine-arts education and programming in the Downtown, stimulating the development of live-work spaces for artists and taking other measures to make the Downtown artist friendly. These suggestions generally focused on stimulating fine arts as an activity, rather than as a building initiative. However, survey respondents were also asked to state their level of support for a possible performing-arts center in or near Downtown. Their supportive responses are discussed below and illustrated in Table 17.

Although the survey and focus groups dealt with commercial development, some respondents took pains to mention how much they would like to see condominiums developed in the Crescent District so that they could move right into the Downtown. The Crescent District Master Plan of June 2006 appears to address this demand for Downtown living quite well. Focus-group participants commended it highly and inquired when it would be implemented. Finally, it was also suggested that Leesburg grow the employment base of Downtown (which would stimulate more commercial and housing development) by making the Downtown an incubator for new, high-tech businesses, especially those in the medical-technology industry. Improvements such as wireless (wi-fi) infrastructure, some suggested, might constitute one step toward creating a supportive environment for such high value-added economic activities.

Other Changes – Physical Improvements: Several persons suggested changes related to physical conditions. Some are captured in these focus-group participant statements: “They need to clean it up; it’s dirty.” “Fix the broken benches.” Others noted that the volume of traffic on Market and King Streets makes it difficult, if not treacherous, for pedestrians. More traffic-calming or traffic-reduction measures are necessary, they maintained, if Downtown is to be made more welcoming to pedestrians. Several persons suggested that sidewalks on King and Loudoun Streets be widened to accommodate al-fresco dining and that this could be managed by removing parking from one side of those streets. Note, however, that parking is already restricted to one side of King Street, and it is not clear how many Downtown users would support the removal of all parking from the street.

Other Changes – Publicity and Promotions: Many focus-group participants bemoaned the relocation of the Visitor’s Center and Chamber of Commerce outside of the Downtown and argued that the Downtown needs the welcoming presence that such a center can bring. Several persons also suggested that a “Loudoun products store” that would showcase the area’s many agricultural products and crafts would be a very welcome addition to the Downtown.

When asked how they know what is going on Downtown, focus-group participants stated that they rely upon Leesburg Today and the Loudoun Times-Mirror, as well as the Thursday “Loudoun” section of the Washington Post. Those who live in the Town of Leesburg also rely upon Leesburg at Leisure or the CIP Newsletter, but those who do not live in town apparently do not receive these publications and therefore often do not know what is going on Downtown. They stated that they would like to receive regular notification about the opening of new establishments and about events Downtown. Even Leesburg residents stated that they want more advance notice of Downtown events and they want to hear more about the Downtown in general.

Other focus-group participants stated that the Downtown brochure is out of date and is therefore likely to disappoint out-of-town visitors who cannot find merchants listed in it. A couple of focus-group participants noted approvingly that some merchants cross-promote each other, by giving out discount cards to shop at another store in the Downtown. They suggested that this practice be replicated throughout the Downtown.

New Uses – Performing Arts Center: Survey respondents were told that Leesburg is considering the development of a performing arts center in or near the Downtown, and they were asked to state their level of support for such a venue, by estimating the number of times per year they would attend performances of a national company, and the number of times they would attend performances of a local or regional company. Tables 17A through 17C display respondent answers to the question of how many performances of a national theater company they would attend per year. Table 17A shows results for the Downtown survey, Table 17B for the Outlets and Marketplace, and Table 17C for both groups combined. Within each table, we distinguished the responses of persons who identified themselves as out-of-town visitors, versus nearby residents and Downtown workers.

Support for a performing arts center with national acts appears to be strong. As Table 17C shows, only 15% of the respondents stated that they would not attend any performances of a national company in a typical year. Although a plurality of respondents (38%) stated that they would attend only 1-2 events per year, Table 17C shows a small, but very enthusiastic group of Leesburg-area residents and workers (56 persons, 31%) who would attend five or more events per year. These respondents conveyed strong enthusiasm for this idea to the survey takers as well. A glance at Tables 17A and 17B shows that the overall pattern generally holds true for persons surveyed in the Downtown as well as those surveyed at the Outlets and Marketplace. It should be noted that visitors from out-of-town expressed somewhat less enthusiasm for the performing arts center with national companies.

Number of Times Respondents Would Attend Events at a Downtown Performing Arts Center						
Table 17A Downtown Survey: National Company	**0**	**1 - 2**	**3 - 4**	**5 or more**	**no answer**	**Total**
All	21 *14%*	60 *41%*	26 *18%*	36 *24%*	4 *3%*	147
Local (residents or workers)	6 *6%*	38 *37%*	22 *22%*	34 *33%*	2 *2%*	102
Visitors from out of town	15 *33%*	22 *49%*	4 *9%*	2 *4%*	2 *4%*	45

Table 17B Outlets/Marketplace Survey: National Company	0	1 - 2	3 - 4	5 or more	no answer	Total
All	16 *17%*	32 *34%*	18 *19%*	24 *26%*	3 *4%*	93
Local (residents or workers)	9 *12%*	28 *36%*	16 *21%*	22 *29%*	1 *3%*	76
Visitors from out of town	7 *41%*	4 *24%*	2 *12%*	2 *12%*	2 *12%*	17

Table 17C All Surveys Together: National Company	0	1 - 2	3 - 4	5 or more	no answer	Total
All	37 *15%*	92 *38%*	44 *18%*	60 *25%*	7 *3%*	240
Local (residents or workers)	15 *8%*	66 *37%*	38 *21%*	56 *31%*	3 *3%*	178
Visitors from out of town	22 *35%*	26 *42%*	6 *10%*	4 *6%*	4 *6%*	62

Tables 17D, 17E and 17F display responses to the question when regional or local company is substituted for national company. Here the support is considerably more modest than for a national company. Only about half of the out-of-town visitors to the Downtown (Table 17D) stated that they would attend such performances, and less than half of the out-of-town visitors to the Marketplace and Outlets (Table 17E) stated that they would do so. Although a strong majority of local residents and workers surveyed at both the Downtown and the Marketplace and Outlets (Tables 17D, E and F) stated that they would patronize regional or local acts, the number of performances per year that they would attend is somewhat lower than the number of performances of a national company that they would attend.

About ten percent of the survey respondents made additional comments on this issue. Of these, the most prevalent are that support would be contingent upon the kind and quality of performances and that the price of the performances would be a factor. A few respondents opined that such a center could not compete effectively with other regional venues. A few others wondered if the Tally Ho Theater could serve perhaps just as well as a venue for the performing arts or vintage movies. Others opined that Leesburg should focus more on supporting the arts Downtown than on building a center. But overall, respondents expressed support for a performing arts center Downtown.

Number of Times Respondents Would Attend Events at a Downtown Performing Arts Center						
Table 17D Downtown Survey: Regional Company	***0***	***1 - 2***	***3 - 4***	***5 or more***	***no answer***	***Total***
All	34	53	27	30	3	147
	23%	*36%*	*18%*	*20%*	*2%*	
Local (residents or workers)	12	38	22	29	1	102
	12%	*37%*	*22%*	*28%*	*1%*	
Visitors from out of town	22	15	5	1	2	45
	49%	*33%*	*11%*	*2%*	*4%*	

Table 17E Outlets/Marketplace Survey: Regional Company	***0***	***1 - 2***	***3 - 4***	***5 or more***	***no answer***	***Total***
All	27	31	15	14	6	93
	29%	*33%*	*16%*	*15%*	*6%*	
Local (residents or workers)	17	28	14	13	4	76
	22%	*37%*	*18%*	*17%*	*5%*	
Visitors from out of town	10	3	1	1	2	17
	59%	*18%*	*6%*	*6%*	*12%*	

Table 17F All Surveys Together: Regional Company	***0***	***1 - 2***	***3 - 4***	***5 or more***	***no answer***	***Total***
All	61	84	42	44	9	240
	25%	*35%*	*18%*	*18%*	*4%*	
Local (residents or workers)	29	66	36	42	5	178
	16%	*37%*	*20%*	*24%*	*3%*	
Visitors from out of town	32	18	6	2	4	62
	52%	*29%*	*10%*	*3%*	*6%*	

6. Summary of Downtown's Strengths, Weaknesses, Opportunities & Threats

This section organizes the key findings presented above and combines them with the results of interviews conducted in August 2007 of 25 merchants, property owners, museum managers and government officials. The framework employed here is a so-called SWOT analysis. To use it effectively, one should seek to build upon the strengths, overcome or avoid the weaknesses, address the threats, and seize the opportunities. Within each category, the items are organized along four dimensions similar to those used by the National Main Street® program: economic and business base, design and physical attributes, image and promotions, and organization.

<u>Strength – Economic and Business Base</u>: Downtown Leesburg currently has a stable business base comprised largely of government workers (County and Town) and professional services. Downtown has several strong and well-known retail businesses and restaurants. As revealed in the business zip-code survey, as well as in the surveys, interviews and focus groups, these businesses have established a solid base of customers in the region that can be built upon to further expand Leesburg's market penetration.

Near the historic Downtown – and within the expanding Downtown that includes the Crescent District – are important convenience-retail uses, such as grocery stores, gas stations, and others. The Farmer's Market at Catoctin Circle and King Street is a strong asset for the area.

<u>Strength – Design and Physical Attributes</u>: Downtown Leesburg's greatest asset is its historic physical fabric, pedestrian scale and small-town ambience. On this point, there appears to be unanimity among all persons who participated in this study. The Town Hall and associated parking garage, as well as other projects such as Market Station and the W & OD Trail, are tremendous assets. The Downtown is surrounded on three sides by beautiful, historic neighborhoods, attractive modern subdivisions, and green spaces and parks.

<u>Strength – Image</u>: Downtown Leesburg enjoys a generally positive image in the region. This is reflected in the numbers of people who come to browse and who bring out-of-town visitors. It is also reflected in the number of people who choose to live in or near the Downtown.

<u>Strength – Organization</u>: Downtown has three different formal business organizations – the Crossroads, Inc. downtown-promotion organization, the Leesburg Downtown Business Association and the newly formed Downtown Improvement Association. Although two organizations may be sufficient, the existence of three organizations shows tremendous interest on the part of business and property owners in improving and maintaining the district. Downtown Leesburg also appears to have an engaged citizenry, some formally organized in special-interest groups, who are interested in Downtown improvement. It is also a strength that Downtown is included in the Town's economic development program.

Leesburg and Loudoun are fortunate to have few of modern society's social problems. For example, crime rates are very low and the schools are good.

<u>Weakness – Economic and Business Base</u>: Downtown's mix of retail and dining establishments does not adequately serve its primary and secondary markets. Unlike Gettysburg or Williamsburg, for example, Downtown Leesburg does not draw destination- or vacation-tourists from far away. Rather, the vast majority of people who come Downtown to shop or dine live in the region and stay Downtown for only a short while. Although Downtown may be able to increase its vacation-tourist draw, it is highly unlikely that it will ever be able to make this kind of tourism its major economic activity. This is not surprising. Contrary to popular perception, few communities, even those with beautiful historic fabric, can make their living from destination tourism.

Downtown's problem is that a number of highly visible restaurants and retail shops reportedly have a product mix and pricing points that are targeted primarily at a destination- or vacation-tourist market that is not drawn to Leesburg in sufficient numbers to make these businesses or restaurants thrive. Although out-of-town visitors do spend more than nearby residents or workers, they do not spend enough to offset the general lack of destination-tourist traffic. In the meantime, Leesburg-area residents who would come Downtown more frequently are put off by what these establishments have to offer, or by their prices.

Except for regional and super-regional shopping centers or outlets, a commercial district's most important market segment is the one that lives close to that district. Currently, Downtown does not provide enough goods and services to satisfy this primary market consistently. Also important as a market for some goods and services is the daily workforce. Currently, only a handful of restaurants and cafes serve this market consistently. Downtown's secondary market – the suburbs of Leesburg – is not drawn Downtown on a more frequent basis because these persons perceive that Downtown lacks a sufficient volume of attractive stores and restaurants, because they perceive parking to be a hassle, and because they are not reminded often enough about what Downtown Leesburg has to offer.

Downtown's potential for retail expansion is severely constrained by the growing cornucopia of retail, service and dining offerings located primarily to the East. Its historic district is also constrained by the small footprints of its historic buildings and by its narrow roadways. Clearly, Downtown cannot compete with a complete line of retail goods and services. But it should be able to meet more of the needs of its primary and secondary residential markets and its workforce.

<u>Weakness – Design and Physical Attributes</u>: The historic Downtown is situated at the crossroads of two highways – Routes 7 and 15. While this might seem to be an asset, it presents problems. Only a miniscule percentage of those who drive through Downtown actually stop to shop or dine. As a result, the heavy traffic flow on these streets, as well as on Loudoun Street, undermines the pedestrian ambience without bringing more customers to the shops and restaurants.

Some of Downtown's restaurants and shops are not physically welcoming. Some of the doorways and windows do not allow for the "open-air" dining that could take place even inside the restaurants if they were more open to the street.

The current arrangement of stores and professional services is not optimal. On Loudoun and Market Streets in particular, shopper foot-traffic is interrupted by professional services offices.

Most customers will not pass such "dead spaces" to find the retail shops on the other side, unless they are already looking for them. The point of browsing is to walk somewhat aimlessly and allow interesting things in shop windows to pull one into the store or dining establishment. A blank wall or office stops the aimless flow and thus stops the foot traffic.

Parking remains a problem, at least for persons who reside outside of the immediate Downtown area but who would come Downtown more often if free or inexpensive parking seemed to them to be easier to find. Despite the deck on Market Street, with its convenient location and well-thought-out pricing system, many survey and focus-group respondents made comments like these: "I'm constantly circling around the garage to find a spot," "I was just appalled by the parking rates" and "I don't know why they have to give out so many tickets [on the street] – people will never come back after that."

Weakness – Image and Promotions: At least some of Downtown's attractions, such as Dodona Manor and the Courthouse, seem to be inadequately marketed to potential visitors. We did not conduct an analysis of Downtown promotion activities, but given the number of survey and focus-group respondents who stated that they did not know about them, were not planning to visit them, or who had never even received promotions to visit them, it seems likely that more could be done to generate interest in these places.

With few exceptions, Downtown's merchants and service providers do not promote each other's businesses, or do not do so very aggressively. This is essential to the creation of a viable shopping district and it is easy to do.

Residents of the Town of Leesburg receive occasional publicity about the Downtown and its merchants through various publications, but residents outside the town stated that they neither hear nor read very much at all about the Downtown or its events. Downtown lacks an official welcome center or visitors' center. The Loudoun Museum and Town Hall make valiant efforts in small spaces, but they are located in out-of-the-way places and do not have all of the materials to serve as effective welcome centers and promotion vehicles for the town or the county.

Weakness – Bureaucratic Organization: Poor communication and unclear procedures reportedly hamper the development-review processes, especially the Board of Architectural Review process. All seem to agree on the importance of retaining Downtown Leesburg's historic fabric and for having standards to keep the fabric intact. Yet the interviews conducted for this study indicate that many people are concerned about the interpretation of the historic guidelines. To those on the development side of the issue, the criteria sometimes seem unclear and the approval process seems to have no fixed duration. And to some, the requirements seem picayune and oblivious to cost.

Opportunity – Economic and Business Base

A Growing Market for Housing, Dining, Entertainment and Specialty Retail: Loudoun County's population and workforce are growing at a torrid pace and the county has the highest median household income in the nation. Loudoun is forecasted to continue to outpace most of the region and the nation in both population and employment growth in the coming decades. Population growth rates and household incomes in and near Leesburg are close to those of the county. Growth in Loudoun and Leesburg is strong across all age ranges, especially those under 64.

In short, highly educated, young- to middle-aged professionals with middle to upper incomes, and, to a somewhat lesser extent, middle and upper-income families with one or two children comprise Leesburg's primary and secondary trade areas. Downtown's historic physical fabric and pedestrian-scale ambience position it very well to attract a portion of this residential growth to areas like the Crescent District (discussed below), especially from young to middle-aged professionals, but also from empty-nesters and retirees, and to a somewhat lesser extent, families with children.

Although Leesburg residents and workers will continue to do their major shopping outside of the Downtown – even an expanded Downtown that would include the Crescent District – these markets can support some convenience retail uses, such as a store selling food, newspapers and magazines, and some drug-store items.

Loudoun's population, and certainly Leesburg's, has the income to eat out very often – every night, as one focus-group participant put it. As the population grows, this market will only get bigger. As discussed throughout this report, Downtown's problem is not that it lacks a market for dining, but that some of its existing restaurants are focused on a market that cannot be attracted in large numbers – vacation-tourists.

The locally-based market for dining in Downtown Leesburg is large and growing, but it needs to be captured with cuisines and dining formats that it likes and at prices that it wants to pay. Numerous opportunities for new restaurants Downtown exist. For example, a savvy restaurateur could capitalize on the growing interest in locally produced food by featuring a menu with items grown in Loudoun. A "slow-food" culinary school that prepared meals with locally grown food would find a potentially loyal market in Downtown's primary trade area – residents who live there because they value the small-town ambience and independent businesses.

Entertainment is an equally important and still untapped market Downtown. The survey showed strong support among Downtown visitors for a performing arts center. If such a venue is constructed, it should be placed in the Downtown (defined as the area including the Crescent District), in a development plan that includes restaurants nearby. But less ambitious efforts should be seriously considered as well. A dinner theater, a dinner-and-a-movie house, and a jazz bar are some of the options mentioned in focus-group discussions or interviews that could attract a portion of the young professional market or older couples and singles.

The Arts: Fine arts are another activity that can be viable Downtown, especially in the Crescent District. The art gallery and school on King Street is one such example, but the expanded Downtown would also be a viable location for artist live-work spaces and live-work-gallery spaces. This is an activity that typically does not locate in, or do well in suburban shopping malls, but it often requires public or non-profit support to thrive. The important thing is to make the expanded Downtown an artist-friendly place and to organize support linkages with other institutions, such as area schools, that would help to make the arts thrive Downtown.

Incubating Medical- and Information-Technology Businesses: Loudoun County's rapidly growing medical devices and related industries may offer excellent development opportunities for Downtown Leesburg. The development of the $600 million Howard Hughes Medical Institute and the presence of Inova and other large organizations in the health-care and health-sciences industries will create opportunities for new, ancillary products and services in the region. Added to these are the opportunities for growth in information-technology industries generally. The region's highly educated workforce is likely to be a source of new innovations and business start-ups in these industries. Downtown Leesburg – including the Crescent District – is a potentially attractive location for such small, start-up businesses. Even some buildings on the periphery of the historic district itself would be appropriate locations for such businesses. And such creative knowledge-industry workers often desire the pedestrian-oriented, urban ambience that Leesburg's Downtown offers. Downtown could be wired as a wi-fi hotspot, enabling people to do some of their work in cafes, or on benches along the W & OD Trail. More generally, this would convey the point that Leesburg, like Old Town Alexandria, Downtown Roanoke and other historic downtowns with wireless internet service, welcomes modern businesses.

<u>Opportunity – Physical Development</u>: <u>The Crescent District Master Plan</u> can help Leesburg capture portions of the growing population and workforce markets described above. It is in the nature of successful downtowns to expand, and the Crescent District is the logical direction in which such expansion should take place. The Plan's emphasis on dense, mixed-use development that is generally compatible with the materials and fabric of the historic district is

quite appropriate. As the Crescent District is re-developed, the notion that Downtown Leesburg includes everything from Catoctin Circle in the south to Ida Lee Park in the north will take root, encouraging even more pedestrian activity than takes place now.

Threat – Competition from New Centers: The primary threat facing Downtown Leesburg is the continued loss of economic functions to other centers. Like most mature downtowns, Leesburg lost most of its retail functions to outlying suburbs years ago. But because of its historic, small-town, pedestrian-oriented ambience, it still has a competitive edge in dining and entertainment, in small boutiques and other specialties. And thanks to the pedestrian-oriented neighborhoods nearby, it still can serve as a high-quality mixed-use community that offers housing, employment and convenience-retail shops. But the rise of lifestyle centers in suburban areas threatens to take even this distinctive advantage away, if the Downtown does not focus on serving its primary and secondary markets well.

Threat – Loss of Employment Base: A close second in importance is the threat of losing the Downtown employment base without replacing it. It appears to be but a matter of time before the County offices leave and, with them, perhaps some of the professional services businesses as well. This loss need not damage the Downtown. As noted above, the Downtown would be an excellent location for new business start-ups and even medium-sized businesses.

7. Downtown Enhancement Recommendations

Leesburg is doing many things right with its Downtown, but it faces serious challenges that must be addressed very soon. Downtown also has strong assets upon which to build, as Section 6 points out. If Leesburg moves decisively on a few key items, positive momentum will build and success will come.

It is the responsibility of Town government to focus the community's attention and prioritize action steps to move the Downtown forward. Yet, government alone can do very little. The community's ability to build upon its strengths and seize new opportunities, while overcoming weaknesses and addressing threats, will depend upon its ability to craft strong partnerships between Town government, private property owners and developers, retailers and restaurateurs, and non-profit organizations. Such partnerships will only form if leaders in each of these groups step forward in a spirit of cost-sharing and compromise for mutual benefit. The following recommendations, organized in the Main Street® program's four-point framework (economics, design, promotion & marketing, and organization), are some of the most important ones that Town government should take the lead in prioritizing and organizing, and which the public-private partnerships should carry out.

Economic Initiatives

- Maintain a diverse array of mutually supportive uses, including:
  - An employment base comprised of dynamic sectors of the economy (such as small, knowledge-intensive start-up businesses), other creative activities, such as artists, and government and related professional services, which are recession-resistant;
  - Apartment and condominium housing in the historic and Crescent districts; encourage Downtown workers to live Downtown as well;
  - Convenience retail and services for Downtown workers and primary-market residents;
  - Moderately-priced dining and entertainment options that serve a variety of market segments, especially residents in the primary and secondary suburban market areas, as well as workers;
  - A moderate number of independent, specialty shops targeted primarily to regional day-visitors from Leesburg's secondary trade area. These shops will also appeal to vacation-tourists.
  - Well-marketed cultural attractions.

Physical Initiatives

- Implement <u>The Crescent District Master Plan</u> as soon as possible. This will add to the area's residential base and further bolster the market for convenience retail, services, dining and entertainment Downtown.
  - Allow the Crescent District to develop a sufficient level of density to create a viable hub of activity and develop commercial uses on the ground floors of the major corridors connecting the historic Downtown to Catoctin Circle, so that the Downtown and Crescent District become functionally integrated. Use form-based zoning codes to regulate the scale and massing of buildings in the Crescent District and to allow for a synergistic mixing of uses.

- Calm the traffic at key intersections in the Old and Historic District. Consider using speed tables (raised crosswalks) or another effective method to accomplish this goal.

- Improve parking for Downtown's secondary market – regional residents coming from outside the town -- who still find parking Downtown difficult.
  - Consider increasing way-finding signage at the eastern and southern approaches to the Downtown.

- o Consider adding one or two small-to-medium-size parking decks, one on the eastern approach into Downtown, just outside the historic district, and perhaps one on the southern approach to the historic Downtown, such as on King Street between the Town Branch and Loudoun Street. Old Town Alexandria has used such small-to-medium-sized decks well, as has Richmond's Carytown. Do not reduce on-street parking unless better options for visitors from the secondary trade area can be found.

- Create a more "browser-friendly" shopping environment by locating business and professional services to the periphery of the Downtown (or to second-floor spaces) and cluster retail shops and restaurants in contiguous ground-floor spaces closer to the center of the Downtown.

- Create more "street-friendly" restaurants and shops.
    - o Implement <u>The Alley: Public Space Improvements Conceptual Study</u> to create more street-friendly retail and dining spaces at the center of the Downtown.
    - o Consider opening restaurant facades to the street (within the limits prescribed by historic district guidelines), to facilitate a more open-air dining ambience indoors (as several restaurants in Old Town Alexandria do).

- Make strategic investments that will make Downtown an optimum location for small, knowledge-intensive businesses (such as medical-instruments technology and other IT businesses) and tech-savvy professionals in general.
    - o Consider constructing a wireless (wi-fi) network in the historic Downtown and Crescent District. This would allow users to access the internet from any location in the district, so that they could work in cafes or restaurants, or on benches along the W and OD Trail. Cities and towns can take several approaches to establishing wi-fi, but for small towns, like Leesburg, the franchise model is the least costly and perhaps the best option overall. Alexandria, Virginia is using this model in its "Wireless Alexandria" project, through which EarthLink provides outdoor coverage along the King Street pedestrian corridor in Old Town, as well as at Market Square and at the City Marina and along the Potomac River waterfront. The service is also available at all Alexandria public libraries. Other cities in the region with wi-fi networks include Roanoke and Pittsburgh.

Promotion & Marketing Initiatives

- Re-establish a Leesburg-Loudoun Welcome and Information Center close to the King and Market Street intersection, or perhaps on Market Street east of King Street.

- The Center should be open most of the day and evening and serve a number of functions, including promotion and ticket sales for all Leesburg events, promotion of Downtown merchants and restaurants through information and gift coupons, and help with parking and other way-finding issues.
- The information should be continuously updated.
- The Welcome Center should display and sell the products of Loudoun County's farms and wineries, and perhaps Loudoun arts and crafts. It may be useful to co-locate such a function with a small gift shop, candy shop, or similar store, so that the two functions could support and draw traffic for each other.

- Merchants, restaurants and service businesses should cross-market each other's establishments.
  - This simply requires that an establishment give customers making a minimum purchase a discount coupon for another establishment. The discounts should be sufficient to lead the customer to the store, even if he or she is not normally likely to go to such a place. A ten-percent discount is probably not sufficient, but 25% probably would be. Once a person enters a store, the chances that he or she will return increase significantly.

- Merchants and restaurants should strategically increase their marketing in Leesburg's secondary market area, especially to the east of Downtown.
  - Broadcast media are very expensive and require numerous and continuous placements to be effective, especially in the cluttered Northern Virginia-Washington, DC market. So other approaches should be considered.
  - The zip-code survey that 11 Downtown businesses completed as part of this study identified a secondary trade area that some Downtown businesses have already penetrated. These zip codes should be mined for more customers. It may be fruitful to send copies of Leesburg at Leisure or even occasional Downtown advertisements to some of these zip codes with targeted marketing messages.
  - Downtown stores and restaurants should consider having their own customers help with marketing. Each customer could be offered a discount coupon to give to a neighbor. Related to this, each merchant should keep an accurate customer contact list and send information and promotions, via post or email, on a regular basis.

- Increase visitation at Downtown historic and cultural attractions.
  - Consider crafting "experience-package tours" (excursions) for some of Downtown's cultural attractions, targeted to specific market niches. For example, there is a

growing number of retirees and seniors in the region who would potentially be interested in Downtown attractions. But they will generally not venture into town without a plan or program of some sort. For seniors, the package might include transportation via van to the attraction, a program and a meal at a local restaurant, with shopping opportunities afterwards. Attractions such as Dodona Manor, for example, might be marketed specifically to Western Europeans coming to Washington, DC, as they either remember or at least have a vivid impression of the miraculous effects of the Marshall Plan on Europe after World War II. Here too, Dodona Manor could team up with Downtown shops or other attractions that are in some way related to Marshall's life, or World War II, etc.

Organization Initiatives

- Streamline the development-review process, especially the Board of Architectural Review process, and establish a one-stop-shop or ombudsman function to smooth all aspects of development review.

- Recruit new businesses that will serve Downtown's primary and secondary markets.
    - Require all businesses to have viable business plans, utilizing the services of the Loudoun Small Business Center, if necessary, to develop such plans.
    - Require all businesses to maintain agreed-upon operating standards, including hours of operation (see below) and attractive store displays.

- Adjust the operating hours of related or complementary businesses to better serve the needs of Downtown's primary and secondary markets, while retaining the patronage of the smaller vacation-tourist market.
    - It is expensive for small retail businesses to expand hours, and the optimal hours are not the same for all retailers, or even all dining establishments. Nevertheless, it is important for the complementary businesses in a shopping, dining, and entertainment district to have commonly known operating hours, and it is important that these hours be frequently advertised.
    - For Downtown Leesburg, the best course of action may be to shift all <u>relevant</u> retail, dining and entertainment businesses to a Noon-to-Nine schedule. This would probably serve both existing users and those who are now asking for evening hours. But careful (albeit committed) experimentation will be necessary to find the schedule that best meets the needs of Downtown's primary users.

Conclusion

Compared to most communities in Virginia, not to mention most communities in the United States, Leesburg is in an enviable position. It is located close to the national capital in a setting of great natural beauty that is also one of the most rapidly growing and wealthy regions in the United States, and which is anchored by both dynamic, knowledge-intensive industries and traditional agriculture. The Downtown has a beautiful and generally well-maintained historic fabric. It has a highly educated population, low crime rates and good schools. The future promises to be even better than the past, if the town addresses the challenges that it faces and seizes its opportunities to thrive in the 21st Century.

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Appendices

A. Shopper-Intercept Survey Instruments

B. Stakeholder Interview Instruments

C. Focus-Group Protocol

D. Secondary Trade-Area Zip-Code Profiles

Appendix A. Shopper-Intercept Survey Instruments

Shopper Intercept Survey
Downtown Leesburg, VA

Excuse me, I'm a VCU student working for town of Leesburg to improve retail offerings in Leesburg. If I could have a few minutes of your time to ask your views, I'd appreciate your help. Your answers will be completely anonymous, we don't need your name but your views will be very helpful to the town.

1) How would you characterize your trip to Leesburg? Are you…..
A) a business worker in or around downtown Leesburg?
B) a resident in or around downtown Leesburg?
C) a visitor from out of town?

IF A OR B, ANSWER QUESTIONS 2-13
IF C, SKIP TO QUESTION 14-21

2) What is the purpose of your trip today?

D) Shopping E) Meal F) Personal service G) Professional service

H) People watching I) Other

3) What shops/stores did you visit or do you plan to visit today?

4) How often do you shop in downtown Leesburg?

J) Daily K) Weekly L) Monthly M) Couple times per year

N) Once a year O) Other

5) What are the three places you visit most often when you come to downtown Leesburg?

6) What time of day do you prefer to shop?
P) Morning (before noon) Q) Afternoon (noon-5pm) R) Evening (after5pm)

7) Do you prefer to shop on:

S) Weekdays T) Weekends?

8) On a scale of 1-5, 5 meaning excelling and 1 meaning poor, how would rate the following aspects of downtown Leesburg?
If 1 or 2, why, a particular instance or situation you found problematic?

Business hours	U)1	V)2	W)3	X)4	Y)5
Parking	Z)1	AA)2	AB)3	AC)4	AD)5
Customer service	AE)1	AF)2	AG)3	AH)4	AI)5
Product selection	AJ)1	AK)2	AL)3	AM)4	AN)5
Overall appearance	AO)1	AP)2	AQ)3	AR)4	AS)5

9) What are the two or three places frequently shop besides downtown Leesburg and why rather than here? (i.e. if identify Safeway, ask where)

1.
Why?

2.
Why?

3.
Why?

******If haven't identified Lansdowne Market Place or Leesburg Premium Outlets then:**

10) Have you been to Lansdowne Marketplace? AT)Y AU)N
Why do you shop there instead of downtown?

11) Have you been to Leesburg Premium Outlets? AV)Y AW)N
Why do you shop there instead of downtown?

12) What other store, service, or amenity would you like to see in downtown Leesburg?

13) Leesburg is considering developing a performing arts center in the downtown. How many performances a year would you attend of a national theatre, dance, or other performing arts company?

AX)0 AY)1-2 AZ)3-4 BA)5 or more

How many performances a year would you attend of a regional/local theatre, dance, or other company?

BB)0 BC)1-2 BD)3-4 BE)5 or more

******SKIP TO QUESTION 22******

14) What is the purpose of your trip today?

BF) Vacation BG) Winery visit BH) Wedding BI) Group tour/visit

BJ) Shopping BK) Other

15) How often do you visit downtown Leesburg?

BL) Multiple times per year BM) Once per year BN) First time

16) How many days do you stay in the area?

BO) One BP) Two BQ) Three or more

17) What stores are you planning to visit or have visited already? **(SAME AS QUESTON 3)**

18) Which, if any, of the following downtown Leesburg attractions have you visited or plan to visit during your stay?

a)	Loudoun Museum	Y(BR)	N(BS)
b)	Thomas Balch Library	Y(BT)	N(BU)
c)	Dodona Manor	Y(BV)	N(BW)
d)	W & OD Trail	Y(BX)	N(BY)
e)	Market Station	Y(BZ)	N(CA)
f)	Tally-Ho Movie Theatre	Y(CB)	N(CC)

19) On a scale of 1-5, 5 meaning excelling and 1 meaning poor, how would rate the following aspects of downtown Leesburg? **(SAME AS QUESTION 8)**
If 1 or 2, why, a particular instance or situation you found problematic?

Business hours	U)1	V)2	W)3	X)4	Y)5
Parking	Z)1	AA)2	AB)3	AC)4	AD)5
Customer service	AE)1	AF)2	AG)3	AH)4	AI)5
Product selection	AJ)1	AK)2	AL)3	AM)4	AN)5
Overall appearance	AO)1	AP)2	AQ)3	AR)4	AS)5

20) What other store, service, or amenity would you like to see in downtown Leesburg? **(SAME AS QUESTION 12**)

21) Leesburg is considering developing a performing arts center in the downtown. How many performances a year would you attend of a national theatre, dance, or other performing arts company? **(SAME AS QUESTION 13)**

AX) 0 AY)1-2 AZ)3-4 BA)5 or more

How many performances a year would you attend of a regional/local theatre, dance, or other company?

BB) 0 BC)1-2 BD)3-4 BE)5 or more

The next set of questions are general questions about yourself and are meant to help us understand how Leesburg can expand its market and attract more people like yourself to the downtown. I really appreciate your patience with this.

22) What is your zip code of residence:
23) In a rough estimate, how much did you or will you spend on this trip?

Shopping: CD) $0 CE) $1-$25 CF) $26-$100 CG) $100-$500 CH) over $500

Dining/Food: CI) $0 CJ) $1-$25 CK) $26-$100 CL) $100-$500 CM) over $500

Attractions: CN) $0 CO) $1-25 CP) $26-$100 CQ) $100-$500 CR) over $500

Lodging: CS) $0 CT) $1-$25 CU) $26-$100 CV) $100-$500 CW) over $500

24) How would you characterize your household?

CX) Family with children CY) Married couple no children CZ) Single

25) What is your age range?

DA) Under 20 DB) 20-30 DC) 31-40 DD) 41-50 DE) 51-64

DF) 65 and over

26) What is the income range of your household?

DG) Less than $50,000 DH) $50,000-$75,000 DI) $75,000-$100,000

DJ) $100,000-$150,000 DK) over $150,000

27) DL) Male DM) Female

Is there anything else you would like to add?

Shopper Intercept Survey
Leesburg Corner Premium Outlets & Lansdowne Marketplace

Excuse me, I'm a VCU students working for town of Leesburg to improve retail offerings in Leesburg. If I could have a few minutes of your time to ask your views, I'd appreciate your help. Your answers will be completely anonymous, we don't need your name but your views will be very helpful to the town.

1) How would you characterize your trip to the Leesburg Premium Outlets? Do you…..

A) work in or around Leesburg?
B) a resident in or around Leesburg?
C) a visitor from out of town?

IF A OR B, ANSWER QUESTIONS 2-11
IF C, SKIP TO QUESTION 12-28

2) How often do you shop at the Leesburg outlets?
E) Daily F) Weekly G) Monthly H) Couple times per year
I) Once a year J) Other

3) What are the places you visit most often when you come to the Outlets?

4) What time of day do you prefer to shop?

K) Morning (before noon) L) Afternoon (noon-5pm) M) Evening (after5pm)

5) Do you prefer to shop on:

N) Weekdays O) Weekends?

6) Have you ever been to downtown Leesburg? P)Y Q)N

IF YES, ASK QUESTIONS 7-9.
IF NO, SKIP TO QUESTION 9 AND ONLY ASK RATINGS FOR OUTLETS.

7) What is the purpose of your trip when you go to downtown Leesburg?
R) Shopping S) Meal T) Personal service U) Professional service
V) People watching W) Other

8) What are two reasons you would choose to shop at the Outlets instead of downtown?

What are two reasons you would choose to shop at downtown instead of at the Outlets?

9) On a scale of 1-5, 5 meaning excelling and 1 meaning poor, how would rate the following aspects of downtown Leesburg and the Leesburg Premium Outlets?
If 1 or 2, why, a particular instance or situation you found problematic?

Business hours- downtown X)1 Y)2 Z)3 AA)4 AB)5

Business hours- outlets	AC)1	AD)2	AE)3	AF)4	AG)5
Parking- downtown	AH)1	AI)2	AJ)3	AK)4	AL)5
Parking- outlets	AM)1	AN)2	AO)3	AP)4	AQ)5
Customer service- downtown	AR)1	AS)2	AT)3	AU)4	AV)5
Customer service- outlets	AW)1	AX)2	AY)3	AZ)4	BA)5
Product selection- downtown	BB)1	BC)2	BD)3	BE)4	BF)5
Product selection- outlets	BG)1	BH)2	BI)3	BJ)4	BK)5
Overall appearance- downtown	BL)1	BM)2	BN)3	BO)4	BP)5
Overall appearance- outlets	BQ)1	BR)2	BS)3	BT)4	BU)5

10) What other store, service, or amenity would you like to see in downtown Leesburg?

11) Leesburg is considering developing a performing arts center in the downtown. How many performances a year would you attend of a national theatre, dance, or other performing arts company?

BV)0 BW)1-2 BX)3-4 BY)5 or more

How many performances a year would you attend of a regional/local theatre, dance, or other company?

BZ)0 CA)1-2 CB)3-4 CD)5 or more

*********SKIP TO QUESTION 23************

12) What is the purpose of your trip today?

CE) Vacation CF) Winery visit CG) Wedding CH) Group tour/visit CI) Shopping CJ) Other

13) How often do you shop at the Leesburg Premium Outlets?

CK) Multiple times per year CL) Once per year CM) First time

14) How many days will you stay in the area?

CN) One CO) Two CP) Three or more

15) If this is your first visit, what stores are you planning to visit or have visited already?

If not, what stores do you usually come here for

16) Which, if any, of the following downtown Leesburg attractions have you visited or plan to visit during your stay?

a)	Loudoun Museum	Y(CQ)	N(CR)
b)	Thomas Balch Library	Y(CS)	N(CT)
c)	Dodona Manor	Y(CU)	N(CV)
d)	W & OD Trail	Y(CW)	N(CX)
e)	Market Station	Y(CY)	N(CZ)
f)	Tally-Ho Movie Theatre	Y(DA)	N(DB)

17) Have you ever been to downtown Leesburg? P)Y Q)N

(SAME AS QUESTION 6)

IF YES, ASK QUESTIONS 18-20.
IF NO, SKIP TO QUESTION 20 AND ONLY ASK RATINGS FOR OUTLETS, THEN SKIP TO QUESTION 22.

18) What is the purpose of your trip when you go to downtown Leesburg? (**SAME AS QUESTION 7)**

R) Shopping S) Meal T) Personal service U) Professional service
V) People watching W) Other

19) What are two reasons you would choose to shop at the Outlets instead of downtown?

What are two reasons you would choose to shop at downtown instead of at the Outlets?

20) On a scale of 1-5, 5 meaning excelling and 1 meaning poor, how would rate the following aspects of downtown Leesburg and the Leesburg Premium Outlets? **(SAME AS QUESTION 9)**

If 1 or 2, why, a particular instance or situation you found problematic?

Business hours- downtown	X)1	Y)2	Z)3	AA)4	AB)5
Business hours- outlets	AC)1	AD)2	AE)3	AF)4	AG)5
Parking- downtown	AH)1	AI)2	AJ)3	AK)4	AL)5
Parking- outlets	AM)1	AN)2	AO)3	AP)4	AQ)5
Customer service- downtown	AR)1	AS)2	AT)3	AU)4	AV)5
Customer service- outlets	AW)1	AX)2	AY)3	AZ)4	BA)5
Product selection- downtown	BB)1	BC)2	BD)3	BE)4	BF)5
Product selection- outlets	BG)1	BH)2	BI)3	BJ)4	BK)5
Overall appearance- downtown	BL)1	BM)2	BN)3	BO)4	BP)5
Overall appearance- outlets	BQ)1	BR)2	BS)3	BT)4	BU)5

IF THEY HAVE BEEN TO DOWNTOWN…

21) What other store/amenity would you like to see in downtown Leesburg?

22) Leesburg is considering developing a performing arts center in the downtown. How many performances a year would you attend of a national theatre, dance, or other performing arts company? **(SAME AS QUESTION 11)**

BV)0 BW)1-2 BX)3-4 BY)5 or more

How many performances a year would you attend of a regional/local theatre, dance, or other company?

BZ)0 CA)1-2 CB)3-4 CD)5 or more

The next set of questions are general questions about yourself and are meant to help us understand how Leesburg can expand its market and attract more people like yourself to the downtown. I really appreciate your patience with this.

23) What is your zip code of residence:

24) In a rough estimate, how much did you or will you spend on this trip?

Shopping: CD) $0 CE) $1-$25 CF) $26-$100 CG) $100-$500 CH) over $500

Dining/Food: CI) $0 CJ) $1-$25 CK) $26-$100 CL) $100-$500 CM) over $500

Attractions: CN) $0 CO) $1-25 CP) $26-$100 CQ) $100-$500 CR) over $500

Lodging: CS) $0 CT) $1-$25 CU) $26-$100 CV) $100-$500 CW) over $500

25) How would you characterize your household?

CX) Family with children CY) Married couple no children CZ) Single

26) What is your age range?

DA) Under 20 DB) 20-30 DC) 31-40 DD) 41-50 DE) 51-64

DF) 65 and over

27) What is the income range of your household?

DG) Less than $50,000 DH) $50,000-$75,000 DI) $75,000-$100,000

DJ) $100,000-$150,000 DK) over $150,000

28) DL) Male DM) Female

Is there anything else you would like to add?

Appendix B. Stakeholder Interview Instruments

Leesburg Downtown Market Study
Property Owners Interview

Hello, it's nice to meet you. My name is __________. I understand you're ______. As you know, Leesburg's economic development department asked us to conduct a study of the Downtown market. Part of that includes interviews with about 40 persons like yourself who are involved in shaping the Downtown in some way. We've already conducted 250 shopper surveys and four focus group discussions. We define Downtown bounded by Catoctin Circle and Ida Lee Park.

As I believe Lisa or another staff person told you, this interview will last 20 minutes or so. It's completely confidential. You will not be quoted by name or by any other identifiers. We'd like you to be as candid as possible, so that we can provide useful information to the Town.

If you have any questions, you can contact Dr. John Accordino at VCU (804-827-0525) or Lisa Capraro at the Leesburg Town Hall (703-771-2734).

Rogers   Kinahan   Accordino

1. What property or properties do you currently own in Downtown Leesburg?

2. How long have you owned this property?

3. Are you planning to buy more property here within the next 5 years? Yes ____ No ___
If yes, which areas?

4. Are you planning to sell any of your property here in the next 5 years? Yes ___ No___
If yes, which one(s) and why?

5. What are the top three **advantages** of owning property in downtown Leesburg?

6.   What are the top three **disadvantages** of owning property in downtown Leesburg?

7. Some have expressed a concern that Downtown is not attracting enough shoppers and perhaps losing customers to outlying malls. Do you think this is true? What, if anything, should be done about it?

8. Some have expressed a concern that rents are becoming too high for independent businesses. Do you think this is the case? If so, what do you think can be done to address this issue?

9. Are there any properties that detract from the Downtown, either because they're not maintained well or don't have well-run businesses? If so, what should be done to deal with this issue? (the interview is confidential)

10. Are you a member of the newly formed property owners association in downtown?
Yes No Why did you join? What's its purpose? Why haven't you joined?

11. What should be done to make the Downtown more successful? (*Probe: Lighting, safety, street furniture, way-finding, signage, new businesses, different marketing, etc)*

Who do you think should be responsible for this?

12. Would you be interested in creating a special assessment district to facilitate these improvements? Yes No If no, why not?

13. Are you aware of any programs within the town that currently offer financial assistance or tax relief to property owners in the commercial area? Yes No
If so, are you using them, or if not why not?

14. What would you like to see happen with the Downtown in the next 5-10 years?

15. What are the two most important things that need to happen to achieve this vision?

I have no more questions, but do you have any comments or issues you'd like to discuss regarding the needs of the area and property owners in particular?
Thank you very much for your help!

Leesburg Downtown Market Study
Merchant Survey

Hello, it's nice to meet you. My name is _________. I understand you're _____. As you know, Leesburg's economic development department asked us to conduct a study of the Downtown market. Part of that includes interviews with about 40 persons like yourself who are involved in shaping the Downtown in some way. We've already conducted 250 shopper surveys and four focus group discussions. We define Downtown bounded by Catoctin Circle and Ida Lee Park.

As I believe Lisa or another staff person told you, this interview will last 20 minutes or so. It's completely confidential. You will not be quoted by name or by any other identifiers. We'd like you to be as candid as possible, so that we can provide useful information to the Town.

If you have any questions, you can contact Dr. John Accordino at VCU (804-827-0525) or Lisa Capraro at the Leesburg Town Hall (703-771-2734).
Interviewer: Rogers Kinahan Accordino

Date and Time________________________________

1. Business Name & Address____
2. Goods or services sold____
3. Days & hours of operation____
4. Are you the business owner? Yes No
5. Does the merchant own or lease this property? Own Lease
6. How many employees work here?
7. How long has your business been here in downtown Leesburg?_________________
8. What are the top three **strengths/advantages** of being located in downtown Leesburg?
9. What are the top three **weaknesses/disadvantages** of being located in downtown Leesburg?
10. Over the past three years, have sales generally: Stayed the same Increased Decreased Why the increase/decrease?
11. Have costs generally: Stayed the same Increased Decreased
Why the increase/decrease?

12. Have rents generally: Stayed the same Increased Decreased
Why the increase/decrease?

13. In the next three years, do you expect sales to: Stay the same Increase
Decrease Why?

14. Do you plan to stay in business over the next 3-5 years? Yes No
If no, why not?

15. Do you plan to move to another location over the next 3-5 years? Yes No
If yes, where? Why?

How satisfied are you with the following?

16. Size of the building? Very Somewhat Not at all Indifferent
Why not very?

17. Physical condition / upkeep of building? Very Somewhat Not at all
Indifferent
Why not very?

18. What improvements to this building would you like to see in the next three years? (*Probe:*
signs, lighting, roof, landscape, awning, parking lot, etc.)

19. What obstacles stand in the way of improvements being completed? (*Probe: financing, owner, other*)

20. Do you think there is enough parking for your business? Yes
No

21. Where do you and your employees generally park?

22. What, if anything, do you think should be done to improve parking in downtown?

Customers

23. On an average weekday, how many customers come into your store?________
Weekend?____

24. How many of your customers are.........

a.	repeat customers	Most of them	About half	Only a few
b.	first timers	Most of them	About half	Only a few
c.	locals	Most of them	About half	Only a few
d.	tourists	Most of them	About half	Only a few

25. Has your customer base changed over the years in any way? Yes No
    How? (*Probe: % of repeat customers, age, income, residence, purchases, how they treat you*)

26. Do you have a target market – by age, gender, income, household structure that you try to reach? Y N
    If yes, how do you try to attract them?

27. How do you advertise your business?

    Radio Newspaper
    (name)__________________________
    Sign Television
    Church Bulletin Yellow Pages
    Window Displays Word of Mouth
    Internet
    Other_____________________________________

28. What methods have worked best for you?

29. Would you be interested in joint advertising with other businesses, or in other promotions to increase sales in the area? Yes No – Why not?

30. An issue that arose during the shopper intercept survey was business hours in the downtown. Would you be willing to stay open at least two or more hours later in the evening, from Wednesday to Saturday to attract more customers? Yes No
    Why not?

31. What new businesses or activities would you like to see here in downtown Leesburg?

32. What are three ways you would **improve** downtown Leesburg to draw more customers?

33. What are the biggest obstacles to these improvements?

34. What do you think the Town of Leesburg could do to help improve the downtown business district?

35. What should property owners do to help improve the area?

36. How satisfied are you with the downtown merchant's association?
    Very Somewhat Not at all Indifferent If not very, why?

37. Are you aware of any government programs to offer financial assistance or tax relief to business owners in the commercial portions of downtown Leesburg? Yes
    No If so, are you using them, or if not why?

Appendix C. Focus-Group Protocol – Basic Instrument

Visual aid: 3ft. x 5ft. map with Leesburg in the middle, giving wide vantage to show its position relative to nearby shopping (Outlets, Lansdowne, Dulles Town Center, Purcellville, Middleburg, etc.)

Opening: The focus group facilitator will welcome the group and give a disclaimer (anonymous session, no tape recorders) and set the ground rules –

- All views and opinions are welcomed and encouraged, but please refrain from arguing.
- Each person should speak on each question if he/she wants to do so.
- Outline the length of the session to be an hour.

Purpose: Leesburg would like to increase the number of people using its downtown. VCU is helping this process through survey work. Your advice will help the town figure out what to do to achieve this goal. We're roughly defining downtown as the portion of Leesburg bounded by Ida Lee Park to the north and Catoctin Circle to the west, south, and east.

1. Where do you live in relation to downtown Leesburg? (facilitator uses the map to point out each person's general location on the map)

2. By a show of hands, how many of you work downtown?

3. How often do you use downtown for shopping, movies, dining, etc.?
   If not, why not?
   If seldom, why not more often?

4. What do you use downtown for? Generally speaking, what do you do in the downtown?

5. How do you know what's going on or what's for sale here before you come? What media and information outlets do you use to learn about shopping?

6. What are the most positive aspects of the downtown?
   (Probe: Comment on things such as looks, stores, people, accessibility, food, products, etc.)

7. What are the more negative aspects of the downtown?
   (Probe: Comment on things such as looks, stores, people, accessibility, food, products, etc.)

8. a. How would you describe the family-friendly atmosphere in downtown, in terms of Restaurants- Entertainment/Recreation- Shopping-

b. How would an increase in family-friendly activities affect your trips to downtown?

9. We understand that not everyone in this group is a senior, but all of you likely know one. There are a large number of senior citizens in the northern Virginia area and Leesburg is interested in understanding how to attract them to downtown.
How senior friendly is downtown Leesburg? For example,
Is it easy to drive here and park your car?

Is there public transit to bring you downtown?

Would you take a bus or van into downtown?

Once you are in downtown, how accessible/senior friendly are the:
Sidewalks

Cross walks

Store entrances/exits,

Store displays?

Good and services?

10. How does the pricing of goods downtown affect your shopping patterns?

11. What could Leesburg do to attract persons like yourselves to use downtown more often?
What would keep people from leaving town to shop?
(Probe: Are there particular stores or services that you would use a lot?)

12. Of everything we've talked about today, what is the single most important thing that Leesburg should do to get more people to come downtown? What's the top priority?

Appendix D. Secondary Trade-Area Zip-Code Profiles

Appendix D. Secondary Trade-Area Zip-code Profiles -- Top 23 zip codes from business zip code survey												
	National Average	22602	20170	22207	22030	20166	20105	25414	22601	20171	20191	25425
		Winchester	Herndon	Arlington	Fairfax	Sterling	Aldie	Charles Town	Winchester	Herndon	Reston	Harper's Ferry
Population	*n/a*	21,031	38,187	29,607	39,274	3,917	1,319	13,202	24,470	33,877	29,077	10,941
Median household income	*41,994*	48,449	84,035	100,390	79,659	67,972	73,750	43,363	34,789	102,577	79,058	47,929
Percent of school age children (5-18)	*20%*	21%	23%	16%	17%	16%	17%	19%	18%	25%	17%	19%
Percent of population 50+	*27%*	27%	15%	33%	24%	9%	40%	30%	28%	17%	28%	27%
Educational attainment (population 25+)												
Less than high school diploma	*20%*	19%	15%	6%	9%	12%	16%	20%	24%	4%	8%	22%
High school graduate	*29%*	33%	15%	9%	18%	19%	24%	34%	27%	9%	10%	33%
More than high school	*52%*	47%	70%	85%	72%	69%	60%	46%	49%	87%	81%	45%
Household type (in households)												
In Family households	*85%*	89%	91%	81%	84%	82%	86%	84%	77%	93%	83%	86%
In Non-family households	*15%*	11%	9%	19%	16%	18%	14%	16%	23%	7%	17%	14%
Travel time to work (for all 23 zip codes; of those that do not work at home)												
15 to 19 minutes	14%											
20 to 24 minutes	13%											
30 to 24 minutes	13%											
Notes:	20175 and 20176 are both Leesburg zip codes; combined zip code population 36,673											
	20147 and 20148 are both Ashburn zip codes; total population 33,647											
	20164, 20165, 20166, and 20169 are all Sterling zip codes; combined zip code population 71,198											
	20170 and 20171 are both Herndon zip codes; combinded zip code population 72,064											
	22601 and 22602 are both Winchester zip codes; combined zip code population 45,501											
Source: U.S. Census 2000												

Appendix D. Secondary Trade-Area Zip-code Profiles -- Top 23 zip codes from business zip code survey												
--	*National Average*	20175	20176	20147	20132	20165	20141	20180	20164	20158	20148	20197	20169
		Leesburg	Leesburg	Ashburn	Purcellville	Sterling	Round Hill	Lovettsville	Sterling	Hamilton	Ashburn	Waterford	Sterling
Population	*n/a*	17,170	19,503	29,696	9,072	27,214	3,200	4,500	34,520	2,939	3,978	1,042	5,547
Median household income													
	41,994	75,521	71,393	88,133	75,120	95,623	88,125	76,920	71,325	76,397	106,977	111,726	90,119
Percent of school age children (5-18)													
	20%	20%	21%	22%	23%	21%	24%	25%	21%	22%	25%	24%	20%
Percent of population 50+													
	27%	21%	18%	11%	27%	17%	26%	28%	19%	32%	6%	33%	28%
Educational attainment (population 25+)													
Less than high school diploma	*20%*	9%	11%	2%	10%	4%	6%	9%	11%	10%	1%	3%	8%
High school graduate	*29%*	17%	20%	11%	19%	13%	18%	27%	25%	24%	13%	13%	22%
More than high school	*52%*	75%	70%	87%	71%	83%	76%	64%	64%	66%	86%	84%	69%
Household type (in households)													
In Family households	*85%*	87%	88%	89%	90%	90%	94%	92%	88%	91%	94%	92%	90%
In Non-family households	*15%*	13%	12%	11%	10%	10%	6%	8%	12%	9%	6%	8%	10%
Notes:	20175 and 20176 are both Leesburg zip codes; combined zip code population 36,673												
	20147 and 20148 are both Ashburn zip codes; total population 33,647												
	20164, 20165, 20166, and 20169 are all Sterling zip codes; combined zip code population 71,198												
	20170 and 20171 are both Herndon zip codes; combinded zip code population 72,064												
	22601 and 22602 are both Winchester zip codes; combined zip code population 45,501												
Source: U.S. Census 2000													