



**PLANNING COMMISSION
WORK SESSION AGENDA**

Heritage Conference Room

September 15, 2016

(Immediately following regular meeting)

- 1) **Call to Order** - Chairman Theresa Stein
- 2) **Chairman's Comments**
- 3) **Discussion of Current Planning Documents: Economic Development**
- 4) **Adjournment**

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STAFF REPORT
WORK SESSION ITEM

Item # 3

SUBJECT: Discussion of Current Planning Documents: Economic Development

DATE OF MEETING: September 15, 2016

STAFF CONTACT: Daniel Galindo, AICP – Senior Planner

SUMMARY:

The Planning Commission will begin a discussion of economic development based on its review of the:

1. *Purcellville, Virginia 2025 Comprehensive Plan,*
2. *Design Guidelines for the Town of Purcellville, Virginia,* and
3. the three draft reports summarizing and analyzing each of the first three rounds of public engagement for the Comprehensive Plan Update.

NOTE: Other documents may also be discussed if determined to be relevant by the Planning Commission or Town Staff.

ATTACHMENTS:

1. Economic Development chapter (pg. 51-68) of the *Purcellville, Virginia 2025 Comprehensive Plan*
2. *Town of Purcellville, Virginia Market Study Update,* September 2014 (25 pages)
3. *2014 Tourism Plan* (29 pages)

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Economic Development

1998 Comprehensive Plan Recommendations

While Purcellville was described in 1998 as a bedroom community serving the major employment centers of metropolitan Northern Virginia, the Comprehensive Plan recognized Purcellville as the agricultural, retail and professional center for western Loudoun County. Route 7 was identified as an opportunity area for additional commercial and industrial activity. Employment opportunities were envisioned to continue increasing for the commercial and service sectors.

Economic development initiatives for the Town encouraged business development that complemented the small-town character of Purcellville and the needs of community residents. The plan included the following major economic development objectives, along with a number of recommended actions. The objectives are highlighted in BOLD below, followed by a list of the actions taken to help implement those objectives between 1998 and the creation of this updated plan:

- **1998 OBJECTIVE 1: Enhancing Purcellville's role as the economic, cultural and educational center of western Loudoun County.**

Actions Taken:

- Enhanced the downtown farmer's market with new signage, provision of wireless internet access for the merchants and addition of electrical service in conjunction with new light poles at the location;
 - Improved Town/business relations through Town-sponsored business forums, charettes and support of the Main Street program; and
 - Supported community events that bring citizens and visitors to the Town business centers.
- **1998 OBJECTIVE 2: Providing a favorable and balanced business climate that encourages the growth of existing businesses and attracts new businesses.**

Actions Taken:

- Began sponsoring Small Business Development Center training programs in Town;
- Conducted consumer and business surveys;
- Worked closely with the Loudoun County Department of Economic Development Community Development program on business recruitment and retention;
- Created a Board of Architectural Review; and

- Consolidated Town commercial zoning districts to encourage mixed use development and to enhance the town's ability to improve the quality of commercial development.

▪ **1998 OBJECTIVE 3: Marketing Purcellville as a premium business location.**

Actions Taken:

- Participated in countywide Main Street events such as Main Street is Blooming; and
- Funded a branding and marketing study for the Town.

▪ **1998 OBJECTIVE 4: Promoting tourism and new business opportunities in the historic business district.**

Actions Taken:

- Joined the Main Street Loudoun program and become an Affiliate member of the Virginia Main Street program;
- Initiated the National Register Nomination for the Purcellville Historic District; and

▪ **1998 OBJECTIVE 5: Providing sufficient physical infrastructure to accommodate future business growth and new economic development opportunities.**

Actions Taken:

- Provided a new public parking lot in the downtown core;
- Implemented traffic improvements to Main Street, Maple Avenue and 21st Street;
- Planned and began construction of new sidewalk connections; and
- Included a Capital Improvements budget within the annual Town budget.

▪ **1998 OBJECTIVE 6: Encouraging businesses that protect Purcellville's environmental and aesthetic qualities.**

Actions Taken:

- Established architectural review of all new commercial and industrial development to ensure that new construction is compatible with the Town's existing small town character;
- Established outdoor lighting standards to minimize light pollution within the Town; and
- Began working with developers to protect sensitive environmental resources through the site plan process.

▪ **1998 OBJECTIVE 7: Providing businesses and Purcellville with balanced, healthy financial conditions.**

Actions Taken:

- Through the business survey, collected data on demands for new businesses and services and developed a preferred business list for recruitment;
- Established Town fiscal policies; and
- Worked to create a balanced commercial and residential tax base.

2005 Existing Conditions

Economy and Market

Purcellville continues to offer a small-town historic character and a prominent location for business development. Market studies conducted in 2004 and 2005 indicated that the Town continues to serve as a major market center for western Loudoun County with significant opportunities for capturing additional economic development. In addition, the opening in the Fall of 2000 of Patrick Henry College, a private, four-year, coeducational college, has the potential to impact the town's economy as it grows. These impacts might include demand for lodging for short-term stays by parents and other visitors to the college, off-campus housing demands, retail and restaurant sales, and additional workforce for local businesses.

Purcellville's fast population growth has outpaced retail and commercial development in town. The 1998 Comprehensive Plan established an ambitious agenda for encouraging additional economic development, and some significant actions were taken, as noted in the previous section. Additional action is necessary to attract desired businesses and balance the residential growth that has occurred.

To ensure the health, vitality and high quality of life for Purcellville, it is essential that the Town support economic development that provides local employment opportunities, needed services to residents, and fosters a healthy community and business environment. Since land for commercial and industrial development is limited, every effort must be made to ensure that land is utilized in a manner that will maximize its contribution to the Town's tax base, while ensuring that development is complementary to Town character and goals for the future. Key to supporting economic development is the attraction of new businesses and visitors, as well as local support of existing businesses.

The Town Council Ways & Means Committee and its citizens' advisory committee, the Economic Development Advisory Committee (EDAC), are charged with promoting economic development, recommending general policies for business development and retention, identifying funds for local economic development activities, review of Town's budget for economic development expenditures, economic development marketing and publicity, promotion of tourism, and identification of potential business prospects. Town branding and marketing have been identified as needed to improve the Town's image, promote economic development opportunities, and improve the health and productivity of the community.

According to the 2005 *Purcellville Business District Market Analysis* conducted as part of the *Downtown Master Plan*, the Purcellville market is characterized as a well-educated, growing, affluent community with upscale lifestyles that offer increasing market potential for services and goods geared toward their preferences (i.e. fine dining, physical activities, arts and culture). As of 2004, more than 91% of Purcellville's population are high school graduates or higher and almost 50% of the households within a ten-mile radius have average household incomes of \$100,000 and above (Source: ESRI BIS forecasts for 2004 and 2009). The Main Street Loudoun *Purcellville Community Assessment* conducted in 2004 indicated substantial retail leakage (retail dollars that are spent by local residents outside of Purcellville) and noted that with only a 25% recapture rate for retail sales, the community could support approximately 98,000 square feet of additional retail space. This premise was confirmed by the 2005 market analysis, based on the continuing growth in households, population and income. Consumers now go elsewhere for many of their service and retail needs, but may be willing to shop locally if the opportunity was available.

Existing Business Characteristics

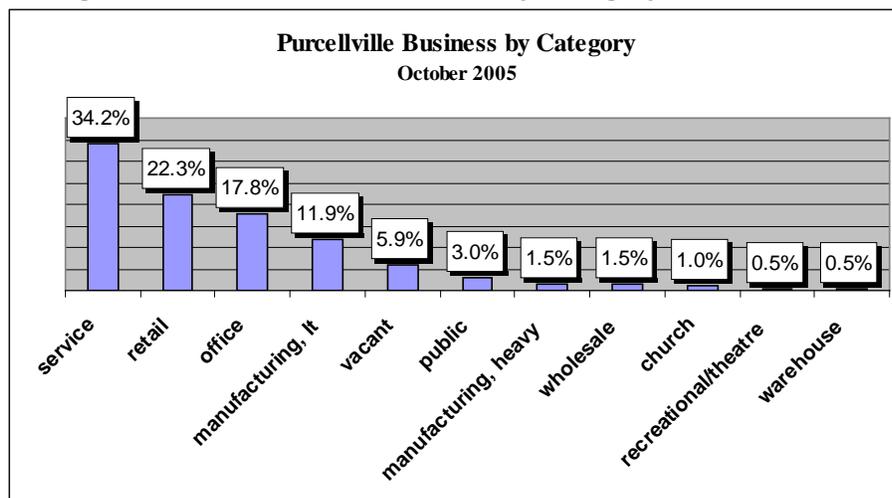
There are several distinct and diverse business areas in Town, and each will require a tailored approach for revitalization and investment. Purcellville's major commercial concentrations are found downtown, along East Main Street, and near West Main and 32nd Streets. Each of these business areas differ in development patterns, architecture, scale, and business type.

Downtown is viewed as the heart of the community, with unique historic structures, such as the Train Depot, Magnolia's at the Mill and Nichols Hardware, and a heritage that creates a special sense of place. Businesses in this area include antique and gift shops, restaurants, hardware, appliance and furniture stores. Based on the existing concentration of home improvement and home furnishing-related business, there is the potential for strengthening the downtown as a niche market for home furnishing and décor businesses. The existing restaurants, including the very popular Magnolia's at the Mill, also provide an entertainment slant to the downtown market. It is worthy to note that the historic Main Street entries into the downtown area provide an important ambiance that is reflective of Purcellville's town character.

The East Main Street corridor includes most of the Town's convenience commercial development, including three shopping centers: Purcellville Shopping Center with grocery and drug stores as anchor tenants; Loudoun Valley Shopping Center, currently anchored by Purcellville Marketplace; and Main Street Station, which includes a Giant grocery store, a bank and a strip of retail and restaurant uses. The area lacks complete sidewalk connections and includes some potential redevelopment parcels. The West Main Street commercial area currently includes a mix of service and convenience uses, as well as the Loudoun Truck Center. This area, which formerly included a car dealership, is currently underdeveloped. Industrial areas are located in close proximity to downtown and adjacent to the Route 7 Bypass. Most of these uses are contained in two industrial parks, Valley Industrial Park and Browning Industrial Park, which are located along Hirst Road. Part of Valley industrial Park is located on the north side of the Route 7 Bypass on East Richardson Lane and contains a variety of auto-related, warehouse and storage uses.

The location and types of businesses in Purcellville in 2005 are shown on the *Existing Businesses by Category* map on the following page. A 2005 land use inventory of commercial and industrial businesses is summarized in Figure 16 below. This inventory found that the largest percentage of town businesses (34%) were service-related, followed by 22% retail, 18% office, and 12% light manufacturing.

Figure 17. Purcellville Businesses by Category – October 2005

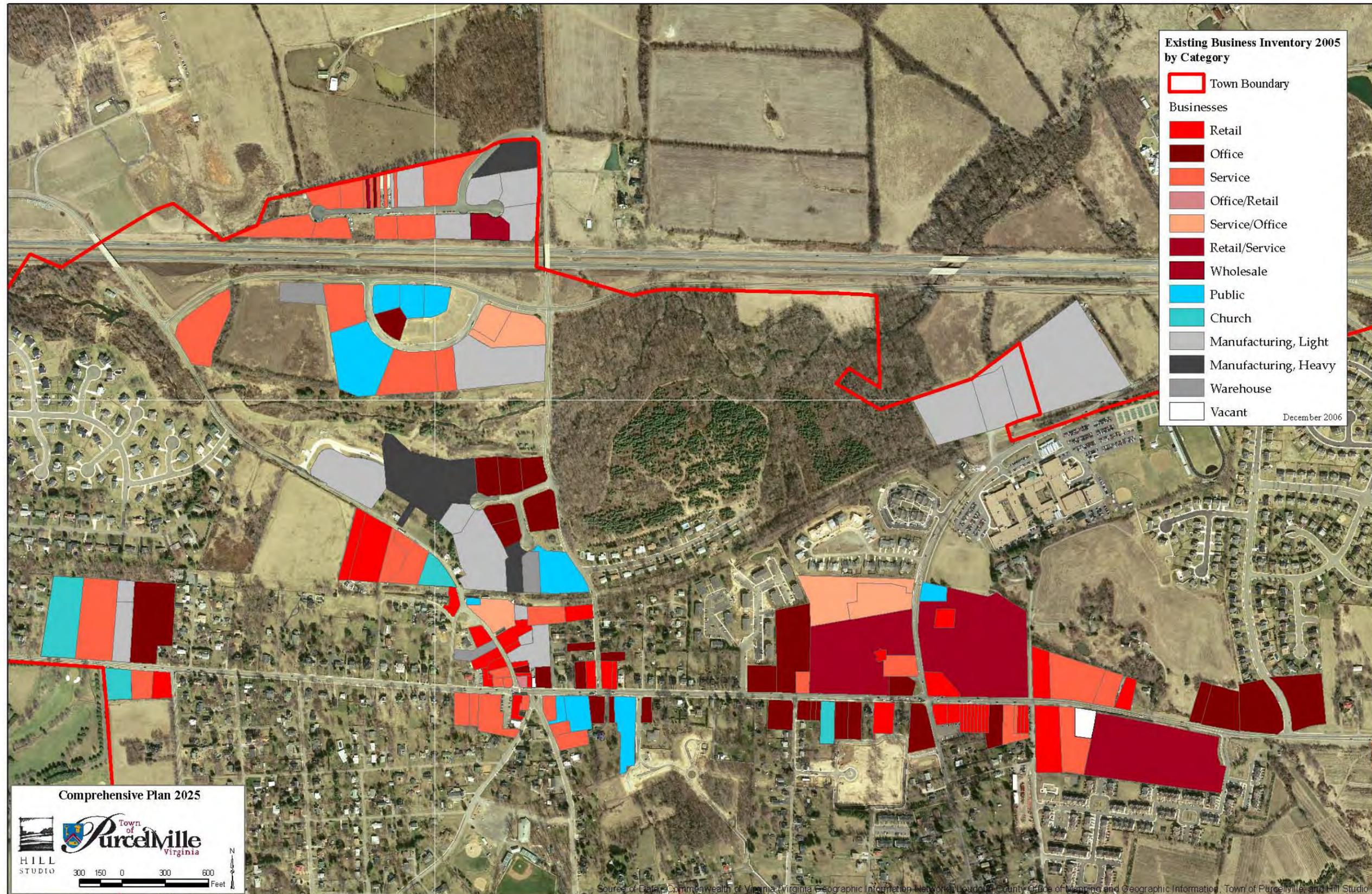


Source: 2005 Purcellville Downtown Master Plan, Purcellville Business Market Analysis

Labor and Employment

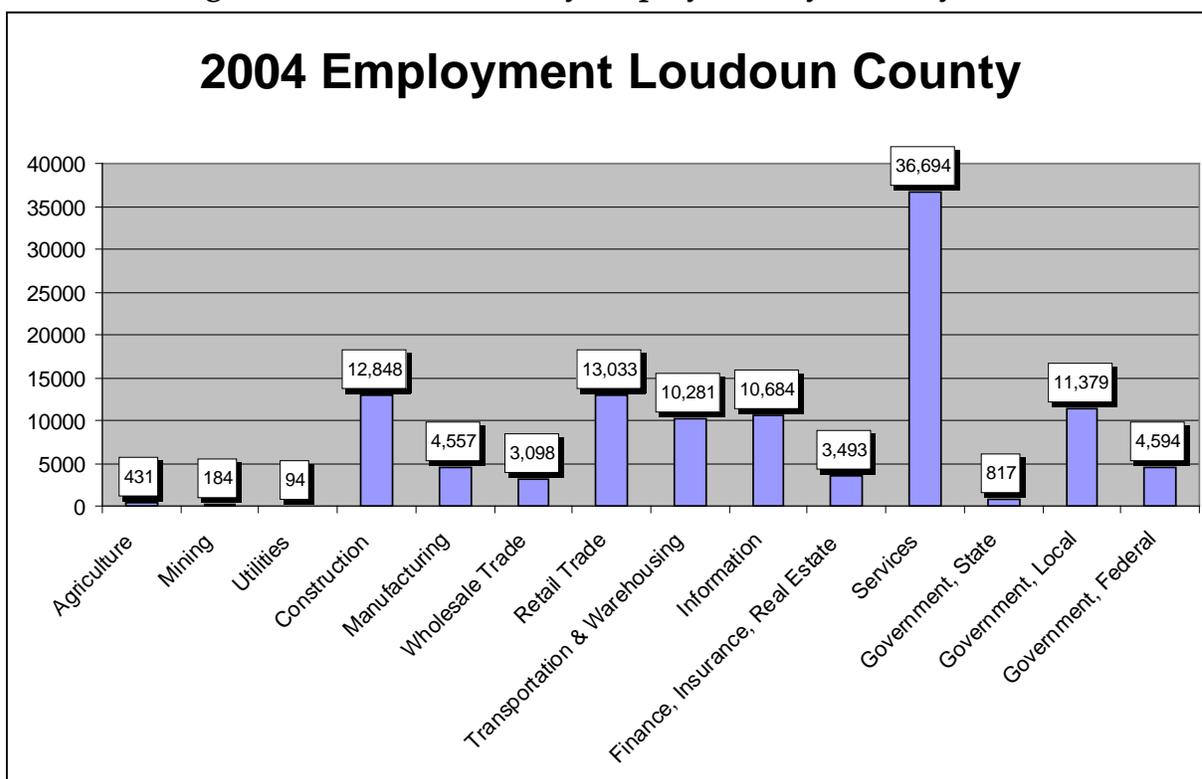
According to Virginia Employment Commission information assembled by the Loudoun County Department of Economic Development, the available civilian labor force in Purcellville and Loudoun County significantly increased between 1994 and 2004, almost doubling from an available 64,697 persons aged 16-64 in 1994 to 127,921 persons in 2004. Over the past decade the labor force participation rate has been high and constant, ranging from 79 to 86 percent. Unemployment rates have remained relatively low over the years ranging from less than one percent in 2000 to 3.6 percent in 2002. In 2004, the unemployment rate in the County was 2.3%, one of the lowest in the nation.

According to October 2005 cooperative forecasts developed by the Metropolitan Washington Council of Governments, employment and jobs in the Washington Metropolitan Area are projected to increase by 50% by 2030. In 2005, the number of employed persons in Loudoun County was 118,032 (Virginia Employment Commission). The highest employment growth is expected between 2005 and 2010. An average of 64,000 new jobs annually is anticipated. Loudoun County is expected to have the fastest employment growth of all jurisdictions (200%) by 2030. With the continued regional growth in jobs, employment is projected to increase in Loudoun County by 55% between 2005 and 2015. By 2030, projected County employment is expected to be 70,356. The amount of this employment growth that will occur within Purcellville will depend upon the opportunities that the community can provide for expansion of existing businesses, as well as the location of new businesses within the Town.



The diversity of employers in Loudoun County provides many employment opportunities which have supported a stable economy. According to the U. S. Census in 2000, 41.5% of those employed resided and worked in Loudoun County (38.9% of Loudoun County residents worked in Fairfax County). The mix of employment in Loudoun County has remained relatively constant over the past 10 years. In 2004, the largest employment was in services (36,694), followed by retail trade (13,033), construction (12,848), and local government (11,379). Two-thirds of all new jobs in 2030 in the Washington Metropolitan Area are anticipated to be in service industries (engineering, computer and data processing, business services and medical research).

Figure 18. Loudoun County Employment by Industry - 2004



Source: Virginia Employment Commission, 2nd Quarter 2004; Loudoun County Department of Economic Development, April 2005 Summary Facts for Loudoun County, Virginia.

Much of Purcellville’s employed population works in the service industry, with white collar jobs being the predominant occupations. Overall, the Purcellville market has a high labor participation rate.

2005-2010 Economic Development Issues and Opportunities

Downtown Issues and Opportunities

New ideas and initiatives for enhanced business development in the downtown have been identified over the past few years. Opportunities exist to improve and expand businesses in downtown to create a special shopping and entertainment destination for residents and visitors. Purcellville has access to technical assistance on downtown development from Main Street Loudoun and Virginia Main Street that can benefit town businesses. Current Town development regulations affecting downtown, however, pose some obstacles to desired redevelopment.

Downtown Purcellville's listing on the Virginia Landmarks Register and pending listing on the National Register of Historic Places may enable property owners to qualify for substantial historic tax credits for the rehabilitation of income-producing buildings. Rehabilitation of commercial historic structures helps the Town to retain the authentic heritage of our community and enhance the commercial tax base.

The 2005 Purcellville *Downtown Master Plan* identified opportunities for infill development and redevelopment. These development initiatives can provide approximately 100,000 square feet of new commercial space, 62 new residential units, and 720 parking spaces in 3 structures (or 240 surface spaces in 3 lots). The master plan recommended the following development initiatives:

- **Streetscape Improvements:** Improvements to 21st , 23rd , and Main Streets, landscaping, decorative lighting, and relocation of overhead utilities;
- **Gateways:** Improvements to East and West Main Street and North 21st Street;
- **Depot District:** Improvements to Depot, W&OD trail; New buildings & parking at Farmer's Market area;



View of the Farmer's Market from the Intersection of 21st and 23rd Streets Showing New Infill Development with New Commercial, Residential and Parking Uses

- Yard at O Street: Improvements to O & 20th Streets; new buildings, parking and plazas; and



View of New Infill Development in the O Street Area Behind 21st Street Downtown Showing Design Compatible with Surrounding Structures.

- Town Green: Improvements to 20th Street and Nursery Avenue at the Tear-Drop, new public green fronting on Main Street, new Town Hall and other new buildings and parking. Plan includes expansion of the library and a new park.



View of East Main Street Showing New Town Hall and Town Green (Methodist Church spire is visible near the center)

East and West Main Commercial Corridors –Issues and Opportunities

Main Street serves as both a western and eastern gateway into Purcellville, although Hirst Road plays an increasing role as a bypass that draws traffic away from the traditional Main Street commercial corridor. Planned new collector roads on the north and south sides of town may accelerate this traffic diversion.

Development at key gateway properties provides opportunities for the Town to continue to attract consumer spending to its Main Street corridor. Development and redevelopment at these locations also offers the opportunity to set an example for other development in Town. The Historic Corridor Overlay District that applies to Main Street will provide design standards for the corridor and guidance for the Town’s Board of Architectural Review in encouraging high quality development within the Main Street Corridor.

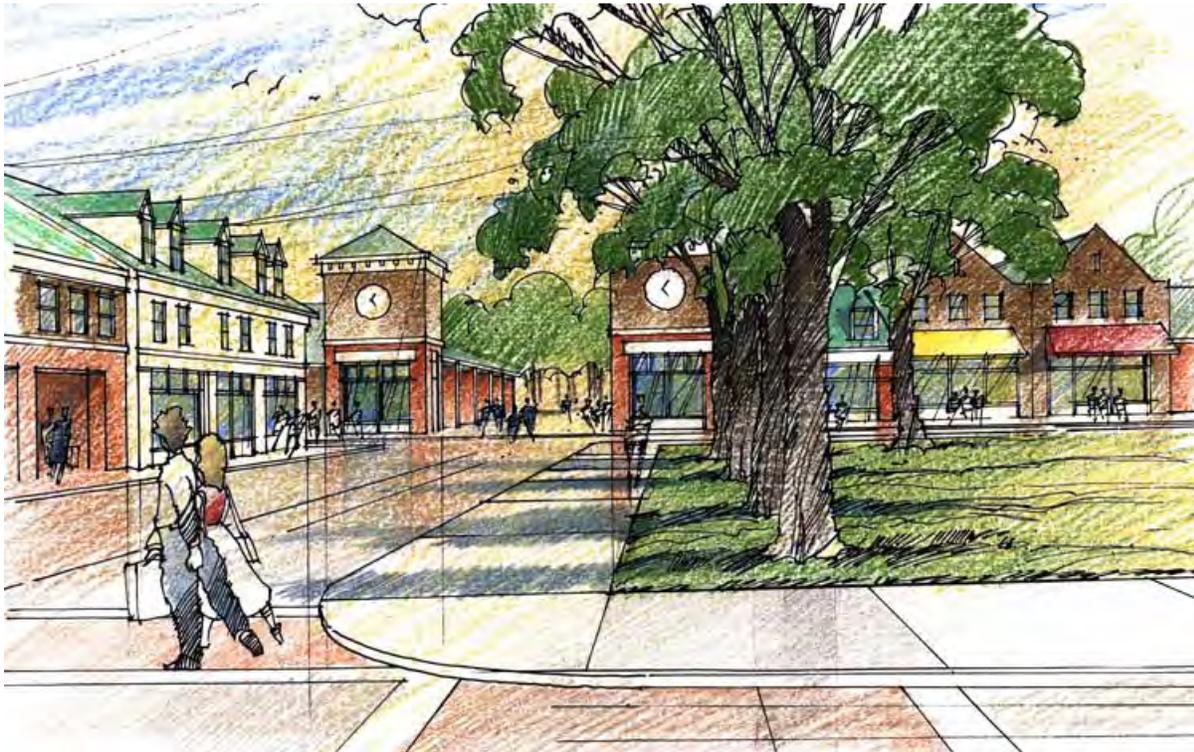
West Main Street is primarily residential, characterized by stately homes, attractive front yards, and a tree-lined street. The existing commercial properties at the West Main entrance to town are underdeveloped and provide a significant opportunity for redevelopment that can enhance the overall appeal of the corridor through new businesses, additional landscaping, improved signage, and coordinated parking and street entrances.



West Main Street at 32nd Street – Opportunities for Redevelopment including Coordinated Signage, Landscaping, and Property Entries

East Main Street near downtown maintains some of the traditional historic town character. The corridor becomes more urban toward Maple Avenue, creating many transportation, architectural and site design challenges.

From Maple to Pickwick Drive along East Main, commercial development is not well coordinated, and there is a need for improvements such as landscaping, coordinated signage, sidewalk connections and consolidated street entrances. Development should be encouraged closer to the street (as opposed to parking), and more attention should be given to attractive building entrances and street frontages. This area presents many opportunities for building enhancement and redevelopment.



East Main Street: Loudoun Valley Shopping Center Redevelopment with Coordinated Façade Improvements

The East Main Street corridor becomes more rural in character as it nears Berlin Turnpike (Route 287), where the Cole Farm and Crooked Run Orchard (Brown Farm) offer opportunities to promote a rural to urban transition into Town that respects land features, development patterns, and environmental context. The Cole Farm is eligible for individual listing on the National Register of Historic Places. Crooked Run Orchard is a heritage “Century Farm” which has been operated by the same family for over 100 years.

Both of these properties create the first impression of the Town of Purcellville and should set an example for development. They deserve special attention and will require collaborative design efforts. Future development should retain the special landscapes, architectural and historic features of the properties and use building materials that are architecturally compatible and complementary. The unique features of these properties contribute to Town identity. Integrating them into new development can provide a transition for community change and growth.

Industrial Areas

Industrial areas in Purcellville are located adjacent to the downtown and north and south of the Route 7 Bypass. These areas are intended to accommodate light industrial uses, while encouraging developments that provide a positive image of the community when viewed upon entry by visitors. New industry is desired that will have minimal impact on the environment and surrounding residential neighborhoods.

Industrial land in Purcellville is limited in quantity and occupied by a variety of businesses ranging from industry to retail services. Industry comprises a significant amount of existing acreage in the downtown, limiting the amount of land available for commercial development. Particularly with respect to downtown, this scenario should be evaluated in greater detail. The future land use map recommends specific areas for further study of appropriate business mix. Additional areas in the vicinity of the Bypass just outside of the current town limits should be considered for future industrial uses in accordance with the adopted Purcellville Urban Growth Area Management Plan (PUGAMP).

In 1992, the zoning for industrial areas near the downtown was changed from commercial to industrial. The new industrial areas provided flexibility in land uses and allowed a mixture of commercial and industrial uses in two industrial zoning districts, M-1 Limited Industrial and CM-1 Local Service Industrial.

The current mixed commercial-industrial zoning includes outdated uses, such as a coal yard and blacksmith shop. The current CM-1 Zoning District allows a wide diversity of land uses ranging from agriculture to retail and service, lumber yards, meat processing and concrete products. Similarly, M-1, Limited Industrial District, allows for manufacturing and retail and service establishments. This results in limited light industrial land being used for uses that may not be the most appropriate for the land or the best business mix for the Town.

The current zoning also does not effectively promote revitalization of the commercial downtown or the development of quality industrial areas; rather, it draws commercial business from the downtown (or other commercial centers) and permits the development of industrial land for other uses. Sufficient industrial land should be reserved for future light industrial needs. In addition, future industrial development should be located in areas that are accessible, but can be adequately screened from major town entrance corridors.

A revision of the existing industrial zoning districts is recommended to encourage appropriate land use and compatible combinations of uses on valued industrial land.

Agriculture

Purcellville's heritage is as an agricultural community. While agriculture and farmlands are declining in the county, they still represent an important industry that should be encouraged and nurtured. With new technologies and an increased interest in organic farming and healthy food production, there are many opportunities for new agricultural products and marketing.

The weekly farmer's market near the Train Depot is a very successful endeavor that is a regional economic draw for both customers and vendors. As of 2006, the market could accommodate approximately 20-25 vendors, and there was a waiting list of vendors desiring to participate.

There are opportunities for the Town to support agriculture through the various rural economy initiatives promoted by Loudoun County's Department of Economic Development, including the following: Loudoun Valleys Initiative; farm tours; market guides to local products; the Loudoun Wine Trail; and equestrian linkages. In addition, there are several rural economy teams and task forces that have been established by the County to foster rural economic growth through agriculture, including the Rural Economic Development Task Force.

The Town Agricultural and Forestal District program permits the inclusion the town's one active farm, Crooked Run Orchard, in the Mount Gilead Agricultural and Forestal District, which provides the owners with tax relief and other benefits. This district also provides the larger community with the benefits of open space and attractive agrarian landscapes. The farm is a Century Farm operated by the same family as a farm for over 100 years. Its use for vegetable and fruit production is expected to continue. Due to the town's agricultural heritage, agricultural sustainability is consistent with the Town's long-term land use goals for this property.

The Town also adopted an open space preservation program in 2006 that establishes a town policy and procedures for acquiring open space through a variety of means enabled by State law. This program provides a vehicle for the Town to work with the owners of private open space, environmentally sensitive land and farmland who may wish to donate or sell their property or easements on their property for perpetual preservation by the Town. The program also helps the Town to qualify for open space preservation funding programs.

Tourism

As an historic Town, heritage tourism is an opportunity for Purcellville to attract visitors, shoppers, and new residents and businesses. The historic downtown and neighborhoods offer opportunities for community revitalization for both business and residential investment. Main Street may offer opportunities for new business development, bed and breakfast operations, or other adaptive reuse residential-business opportunities.

Tourism also can be promoted through special events that provide attractions and entertainment, making Purcellville a destination. Some of the special events held in Purcellville over the past several years include: Purcellville Days; Arts in the Alley; Pride of Purcellville; and the Babe Ruth World Series.

2025 Economic Development Guiding Principles and Implementation Strategies

The following guiding principles for economic development seek to incorporate relevant recommendations of the 1998 Comprehensive Plan, to maximize current opportunities for business growth, and to seize the new opportunities presented by Purcellville's growth. Each guiding principle is accompanied by specific implementation strategies. **Timeframes and participants involved in implementation are defined in the Implementation Strategy Matrix shown in Section IV, Comprehensive Plan Implementation.**

1. ***Economic Development as Contributor to Quality of Life:*** Recognize the importance of economic development to the health, well-being and quality of life for Purcellville's residents. Encourage innovative economic development initiatives that enhance community character and the environment.

Implementation Strategies:

- 1.1 Adopt detailed design guidelines to assist property owners in appropriately rehabilitating buildings and enhancing development in downtown and on major corridors.
 - 1.2 Encourage business improvements (pedestrian amenities, landscaping, signage, lighting, etc.) that are consistent with recommended design standards by preparing and distributing educational materials, advocating improvements through business organizations, and implementing financial incentives, such as grants, loans, and tax abatements, where appropriate.
 - 1.3 Participate in and support special events that contribute to our quality of life and to a positive business climate.
 - 1.4 Develop a Town special events policy to allocate Town resources among events and to establish criteria for such support.
 - 1.5 Work with the Purcellville Volunteer Fire Department to preserve Fireman's Field as an important recreational asset that generates important economic and quality of life benefits for town residents.
2. ***Strong Fiscal Environment:*** Advance fiscally responsible economic development strategies where there is value for taxes paid and commercial and industrial development is stimulated. Promote public/private economic development partnerships.

Implementation Strategies:

- 2.1. Provide incentives for businesses to locate in Purcellville.
- 2.2. Evaluate the competitiveness of business fees in comparison to surrounding localities.
- 2.3. Maintain and enhance the Town's bond rating.
- 2.4. Explore enabling legislation for public/private economic development partnerships that can be utilized by the Town.

3. ***Business Recruitment and Development:*** Facilitate the recruitment and expansion of business and commercial services that support the needs of residents and visitors and increase potential markets. Encourage appropriate business development that enhances downtown, commercial corridors and adjacent neighborhoods. Identify economic development opportunities that take advantage of regional economic trends and initiatives. Provide a favorable business environment that supports existing businesses and encourages new business.

Implementation Strategies:

- 3.1. Implement Town “branding” to establish an enhanced Town image and identity for marketing and business development;
- 3.2. Complete and implement a business marketing plan;
- 3.3. Actively recruit desired businesses that have been identified in recent consumer surveys (i.e. entertainment venues, restaurants, apparel and accessory stores);
- 3.4. Actively recruit businesses that will complement an emerging downtown niche market for home furnishings and décor;
- 3.5. Actively recruit tech-based businesses;
- 3.6. Continue providing regular Town business forums as a vehicle for communication between the Town and the business community;
- 3.7. Streamline local regulations and procedures to promote an efficient and clearly understood business development process.
- 3.8. Provide leadership and participate in partnership efforts among local economic development and business associations, including the Purcellville Business and Professional Association;
- 3.9. Continue coordination and cooperation with the Loudoun County Department of Economic Development on business retention and recruitment;
- 3.10. Participate in partnership efforts among regional economic development and business associations, particularly as it relates to emerging markets;
- 3.11. Develop a coordinated economic development work plan to achieve the desired direction for economic development in Purcellville.
- 3.12. Provide information and assistance to home-based businesses that desire to expand to commercial locations within Purcellville;
- 3.13. Amend town home occupation regulations to permit a limited number of employees from outside the home where adequate off-street parking can be provided;
- 3.14. Ensure that the Town’s business regulations, plans and policies are clear and consistent;
- 3.15. Develop, publish and distribute a business start-up guide that complements the “Guide to Doing Business in Loudoun County”.

3.16. Use the Town website to promote economic development and to help market existing businesses within Purcellville.

4. **Physical Infrastructure:** Provide sufficient physical infrastructure to accommodate future business growth and new economic development opportunities. Ensure that physical infrastructure enhances the town's appearance.

Implementation Strategies:

- 4.1. Develop and implement a Capital Improvements Program;
- 4.2. Continue improvements to the town vehicular and pedestrian network;
- 4.3. Work to get overhead utility lines relocated underground;
- 4.4. Preserve existing water and sewer capacity to support new commercial development in the short term;
- 4.5. Continue to develop new water and sewer capacity as necessary for future economic development;
- 4.6. Use cable franchise and other utility agreements to promote broadband providers for town businesses and residents.
- 4.7. Require the installation of communications conduit in new construction projects to accommodate broadband and future communications technologies.

5. **Historic Downtown:** Support the revitalization of historic downtown Purcellville. Promote the rehabilitation of historic downtown buildings and the development of appropriate infill buildings. Promote mixed use development in downtown and ensure adequate, convenient and flexible parking.

Implementation Strategies:

- 5.1. Implement the key development initiatives (Gateways, Depot, Yard at O Street, and Town Green) recommended in the *Downtown Master Plan* to enhance Purcellville for businesses and residents, provide increased opportunities for new development, and improve transportation linkages. Implement projects according to the adopted phasing recommended in the master plan.
- 5.2. Acquire property where appropriate to facilitate public initiatives and partner with developers to facilitate private initiatives.
- 5.3. Investigate and provide incentives that will promote compatible new development and encourage appropriate rehabilitation of historic buildings in the downtown and on Main Street. Incentives that should be considered include architectural assistance, façade improvement grants, low-interest loans, an enterprise zone, tax service districts, and other similar methods.
- 5.4. Participate in the Virginia Main Street Program.

- 5.5. Revise Town off-street parking regulations to permit more flexible parking arrangements for businesses, such as shared parking among uses that do not need parking at the same time of the day or week.
- 5.6. Revise downtown zoning regulations to make upper story residential uses by-right, rather than special exception uses.

6. **Redevelopment and Infill:** Encourage redevelopment and infill of underdeveloped properties that supports the Town's vision and supports a diverse business base.

Implementation Strategies:

- 6.1. Create and maintain an electronic business database for economic development, including a business directory, a commercial building inventory, and commercial vacancy information.
- 6.2. Continue implementation of streetscape and signage improvements proposed in the Downtown Plan.
- 6.3. Review the C-4 Downtown Commercial District and revise it, if necessary, to ensure that it permits the types of redevelopment and infill development encouraged in the Downtown Plan.
- 6.4. Revise other zoning regulations, including, but not limited to landscaping and screening regulations, in order to support and facilitate the urban scale infill proposed in the Downtown Master Plan.

7. **Industrial Land:** Ensure the adequate availability of industrially-zoned land for light industry and major employers. Encourage clean and environmentally-conscious industry. Encourage the clustering of compatible industrial uses.

Implementation Strategies:

- 7.1 Analyze the market for industrial uses in the Purcellville area and the amount of land necessary to accommodate that market;
- 7.2 Identify desired industrial land uses;
- 7.3 Amend the zoning ordinance and map as necessary to provide sufficient opportunities for desired industrial growth in appropriate locations that will protect the Town's historic, small-town character.
- 7.4 Clarify desired uses in industrial and commercial categories, establish appropriate development standards, develop new district categories, if needed, and develop a plan for addressing non-conforming business issues where changes in land use are recommended.

8. **Tourism:** Support tourism as a valued economic development opportunity that generates important tax revenues through visitor spending without large demands on Town services.

Implementation Strategies:

- 8.1 Work with LCVA to develop and implement a marketing plan for tourism promotion in Purcellville.
- 8.2 Develop an attractive, coordinated directional signage plan for destinations.
- 8.3 Participate in tourism initiatives that will promote tourism in western Loudoun County and its towns. This should include involvement with organizations such as LCVA, Main Street Loudoun and the Journey Through Hallowed Ground.
- 8.4 Install visitor information kiosks or information boards in selected public locations (i.e. Depot, Town Hall).
- 8.5 Recruit businesses that generate tax revenues from visitors, such as visitor accommodations, restaurants and destination retail.
- 8.6 Develop a strategy to measure and demonstrate a demand for attracting lodging to Purcellville.

9. ***Agriculture:*** Recognize the Town's agricultural heritage as important to its future health and well-being and support the viability of agriculture in and around Purcellville.

Implementation Strategies:

- 9.1 Support a strong Farmer's Market in downtown by improving signage and providing other support to the farmer's market organizers.
- 9.2 Participate in regional agricultural partnerships and initiatives to promote community agriculture and local agricultural products.
- 9.3 Amend the Zoning Ordinance to provide an agricultural-tourist commercial zoning district that will encourage and support agricultural/horticultural uses and compatible businesses within Purcellville.

10. ***Environmental Protection by Businesses:*** Encourage businesses to conserve natural resources, protect environmental health and maintain the aesthetic quality of Purcellville.

Implementation Strategies:

- 10.1 Assist businesses in conserving natural resources and improving the environment by initiating a public environmental conservation and awareness campaign.
- 10.2 Develop public education materials that explain and foster best use environmental practices for energy consumption, storm water management, recycling, and tree planting.
- 10.3 Investigate special tax incentives, fee waivers or other tools and programs to encourage business investment in conservation or environmental improvements.
- 10.4 Explore a town recycling program for businesses.



Market Study Update

Prepared by:



September 2014

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1.0 Introduction

1.1 Background

In the mid 2000's, the Town of Purcellville received a suite of services from Main Street Loudoun beginning with the "Purcellville Community Assessment" completed in November 2004. This study examined the physical, marketing, economic development, and organizational issues in the community and (among other things), recommended a more detailed retail market analysis of the community.

The Retail Market Analysis was completed in March 2006 and prepared by Arnett Muldrow through the Main Street Loudoun program. This study further examined retail and demographic trends in the community and made market and marketing recommendations to the community.

As documented in these studies, Purcellville experienced significant growth in the following decade even with the slowing impact of the recession. The community, anticipating this growth, has diligently planned for the future by creating opportunities for additional retail development, better circulation through the Town, and enhancing downtown's physical presence with the addition of pedestrian amenities. New residents have located to Purcellville for its exceptional quality of life and accompanying businesses have located in the community to serve the growing population.

Recognizing the need to continue its success and to understand the market forces that have shifted following the recession, Purcellville commissioned this market snapshot to examine the market in 2014 and explore ways to continue to foster thoughtful commercial investment throughout the Town of Purcellville. This study examines changes in the demographics and retail market since 2006, evaluates progress on recommendations from the 2004/2006 studies, and makes some broad recommendations on future actions that the Town of Purcellville should consider as it moves forward.

1.2 Process

The process involved both a qualitative and a quantitative analysis of retail trade in Purcellville, a review of the prior market work, comparison data from the 2005 study and today, and a look at prospective retail growth in the community. No study of this nature is complete without also understanding the regional context. Consequently, Loudoun County, Leesburg, and other nearby communities were examined since the regional dynamics and impact of Leesburg itself strongly influences the Purcellville market.

1.3 Accomplishments Since the First Studies

As mentioned, the 2004 and 2006 market studies contained a series of recommendations for Purcellville to consider to make the community a more vibrant place to live, work, and visit while preserving the character that makes the community truly unique. The following is a brief synopsis of the recommendations made by the prior studies and the Town's response in following those recommendations.

1.3.1 Physical Recommendations

- *Prepare a downtown master plan.* The 2004 study recommended a downtown master plan that included public and private sector improvements. Within two years, Purcellville had hired Hill Studio of Roanoke, Virginia to complete this master plan.
- *Implement high quality streetscape.* One of the major goals of the downtown master plan was to develop a streetscape improvement plan for downtown to ensure a more comfortable environment for pedestrians. This was particularly important, as the community has the Washington and Old Dominion Trail running from the downtown through town to major population centers to the east. The master plan recommended improvements that have been implemented in phases through the years.
- *Protect and improve gateways.* In 2004, Purcellville did little to announce its entryways. Simple town limit signs were the extent of the gateway experience to the community. Gateway improvements to Purcellville include new signs and landscaping that accents the community.
- *Enhance zoning/design guidelines.* Purcellville needed a way to encourage quality design outside of its historic core. The community became a pioneer in Virginia through a charter amendment that allowed the Town to regulate appearance along its commercial corridors. The resulting new construction connects much better with the historic look of the town.
- *Bike trail along Main Street.* The recommendation was made to connect a bicycle trail along Main Street to continue a loop system for the W&OD Trail through Purcellville. While the Town explored this recommendation, property owners along Main Street and others did not want to commit public right of way to this trail and it was not constructed. Opportunities remain with sharrows and signage to encourage bike friendly access throughout the community.

1.3.2 Promotion And Marketing Recommendations

- *Complete a seamless branding campaign.* Purcellville completed a comprehensive branding effort that unified the typeface for the Town government. The branding has been launched in all public print pieces, on Town vehicles, on community wayfinding, and on local promotional material.
- *Complete a banner/wayfinding sign program.* One of the recommendations of the early planning efforts was to provide a more clear guide for visitors to navigate through the community whether on foot or by vehicle. Purcellville has included the brand in a comprehensive wayfinding system throughout the community that indicates key attractions, eliminates sign clutter, and provides a clear way to cultivate the visitor experience.
- *Long-term launch visitor marketing –* At the time of the original studies, Purcellville’s tourism base was not very strong representing about 4.7% of the customer base of downtown businesses. By the 2014 study, this number had increased to a staggering 20.8%. This increase is the result of a combination of factors including the robust growth of the wine industry in Loudoun County combined with a concerted visitor marketing effort on the part of the Town of Purcellville. Among the efforts completed by the Town are marketing materials and the tagline, “In the Heart of DC’s

Wine Country” to go along with Visit Loudoun’s DC’s Wine Country marketing. The Town also partnered with Visit Loudoun to have a Visitors Center in the Train Station on weekends from May through October. Local wineries provide wine tastings at the Visitors Center on a regular basis. Most recently, the Town received an AFID grant to do a feasibility study-business plan for an Enology and Viticulture Education Center which could further enhance the visitor experience for a community once a highly localized market.

1.3.3 Economic Development Recommendations

- *Conduct a detailed market study* – This study recommended in 2004 was completed in 2006 and provided a baseline for future analysis of the market in Purcellville.
- *Create economic development recruitment effort* – Since 2004, Purcellville has moved from a position of being reactive to development opportunities to being proactive in recruiting businesses, working with developers, and encouraging investment with the knowledge that such efforts reduce the tax burden on residents, add to the quality of life in the community, and make for a more self-sufficient community.
- *Create a master plan that shows investment opportunities* – As mentioned before, the Hill Studio master plan effort for Purcellville indicated investment opportunities in town.
- *Recruit more visitor oriented, dining, and specialty shopping* – As this update will reflect, the addition of dining options has dramatically changed the nature of the visitor experience in Purcellville.

1.3.4 Organization Recommendations

- *Create more efficiency in development services* – The Town has improved and streamlined development services over the years creating a more efficient process that involves regular communication among departments and between the Town and developers.
- *Consolidate multiple groups serving similar purposes* – Many of the groups that existed at the time of the original report were single purpose groups (Centennial Committee) and groups that have since been disbanded such as Main Street. Now the Purcellville Business Association (PBA) and the Economic Development Advisory Committee (EDAC) are two groups tasked with promoting and encouraging a thriving business climate in the community. The Town has also worked with a consultant to do an economic development program assessment that helped direct roles and responsibilities.
- *Hire staff with responsibility for economic development* – Purcellville has a team approach for economic development projects that has served as an ombudsman among departments, the private sector, and local organizations. Together, the Town Manager, Assistant Town Manager, and Community Development Director work on various facets of economic development resulting in an entire town “team approach” to economic development opportunities.

1.3.5 Other Issues

- *Was great concern about the future of Fireman's Field* – Fireman's Field was cited numerous times in the initial studies as being in serious danger of falling into decline. The Town of Purcellville obtained the property, renovated the historic Bush Tabernacle, has enhanced the baseball stadium, and constructed new storage facilities. The now up-to-date facility is actively used for community gatherings, signature events and baseball games.
- *Desire for more regular festivals and events to familiarize people with Purcellville* – Regular events can edify residents' association with downtown and their hometown. They also attract regional visitors that learn about a community and can be converted into more consistent customers. Purcellville's Music and Arts Festival, the award-winning Purcellville Wine and Food Festival, and the Loudoun Grown Expo coupled with regular wine tastings at the Visitors Center and additional events throughout the year have greatly rounded out ways that customers can interact with downtown. In addition to adding festivals and events, the Town has worked with Virginia Tech to track the economic impact of the Wine and Food Festival on the town providing empirical data that shows these activities are drivers of spending in the community.
- *Desire for accommodations/hotel in town* – The 2004 and 2006 studies both included a desire for a hotel in the community. That desire was expressed again in the 2014 study. As of yet, no hotel has located in the community and it is likely that a solution to this issue will require creative financing.

2.0 Retail Market Study

This section of the report presents the findings of the 2014 updated market research for the Town of Purcellville and sets the stage for further analysis that can be used to recruit and retain businesses in the community. It is also designed to help businesses themselves retain existing and target new customers. The findings of this chapter support the implementation recommendations found in chapter three of this report.

This chapter is divided into three sections:

Section 2.1 is a distillation of the community input gathered in a series of one-on-one interviews conducted. This section describes the assets, opportunities, and challenges as described by community leaders and other stakeholders. This input is the “unvarnished” input provided by community stakeholders.

Section 2.2 is the Town of Purcellville market definition based on zip code survey work completed by businesses in the community in May 2014. It also provides insight into the Town of Purcellville trade area demographics and presents market data related to the Town of Purcellville retail trade areas.

Section 2.3 presents the retail market analysis that shows the retail market potential of the retail trade areas. This information is based on the most recent data available and is a reliable source for understanding overall market patterns. This section concludes with some key opportunities for retail that could be used to both enhance existing businesses and recruit additional businesses to the community.

2.1 Community Input

Arnett Muldrow conducted a series of one-on-one and small group interviews with a variety of Purcellville stakeholders. The input documented below is not designed to be exhaustive but rather to provide an overview of what we heard. *Please note that the opinions stated here do not necessarily reflect the opinion of Arnett Muldrow & Associates or the Town of Purcellville.*

2.1.1 Strengths

Interviewees cited many community assets such as:

- Purcellville Gateway has ended up being a very nice development at the entrance to the community. Harris Teeter is regarded as a success and the Starbucks Coffee in the store is one of the busiest in-store locations.
- Patrick Henry College continues to grow, adding a good dimension to the community.
- Downtown improvements have made the district more walk-able.
- The community now has many more sit-down dining options than it used to.
- There is utility capacity for additional growth in the community.
- The distillery and breweries have been unique additions to Purcellville.

- The W&OD Trail is an asset for Purcellville.
- Events downtown have added to the appeal of the district.
- Purcellville weathered the recession in a better position than many other communities and has experienced ongoing growth.
- Town Council has been business-friendly in the community.
- Purcellville is a great place to raise a family.

2.1.2 Opportunities

Interviewees also described a number of opportunities the Town of Purcellville currently enjoys, including:

- Hirst Road has experienced ongoing growth as a location for businesses in the community. The uses along the road include office space, retail and restaurants, warehousing, and manufacturing. This road is ideally suited for a mixture of uses.
- Wineries in the area have grown exponentially in the last ten years – Purcellville has begun to capitalize on that growth in a significant way. The opportunity to grow this even further with a permanent wine presence in downtown is an excellent way to cement Purcellville’s relationship with the surroundings.
- There is an opportunity for more family entertainment options in the community. However, a large development proposal for an indoor entertainment complex was controversial in the community.
- Many interviewees cited an opportunity for additional lodging in the community ranging from more Bed and Breakfast options to a hotel.
- There is an opportunity being pursued for infill development in downtown Purcellville.

2.1.3 Challenges

At the same time, stakeholders felt that Purcellville faces several challenges, including:

- As Loudoun Valley High adds amenities, what will happen with historic Fireman’s Field?
- There is a concern about the design of infill development in downtown Purcellville.
- Nichols Hardware is a longtime staple of downtown and some are concerned about losing this business while others see the site as a redevelopment opportunity.
- A “development gap” exists between Purcellville Gateway and downtown along East Main Street – several uses are out of date, vacant, and some property is not the highest and best use.

2.1.4 Input Conclusion

This input provides a foundation from which to better understand the market data gathered during the study and helps round out the information gleaned from the data shown in section 2.2. Overall there is tremendous optimism about the future of Purcellville, a confidence in the community's current success, and strength in the partnerships that have been forged for progress. The community recognizes its challenges but stands ready to face them with creative solutions.

2.2 Market Definition

This portion of the study will explore what the market for Purcellville looks like. There are many different models for defining a market. Radial studies simply take a location and draw a radius from it. This approach is highly inaccurate for locales like Purcellville where nearby Leesburg becomes a logical alternative to shoppers to the east and Purcellville serves a hinterland that is much more westward oriented. Drive time studies present the same challenges.

Arnett Muldrow uses the zip code approach as its tool for analyzing a trade area. This approach has its own advantages and disadvantages. The strengths of a zip code survey include the following: local merchants have “skin in the game” as they are doing the tracking of customers, visitor traffic can be accounted for which is essential in communities like Purcellville, local customer shopping patterns can be evaluated, customer browsing can be studied by looking at a visitor zip code that appears in multiple shops, and a host of detailed comparisons can be drawn, if needed.

Zip code surveys have their own limitations in that the zip code geography can sometimes be fairly large and stretch beyond the typical market boundaries or include areas that do not relate to the community.

With these limitations in mind, it is the only technique that correlates easily with customer traffic collected by merchants. The zip codes are used to then define a primary and secondary trade area for the community from which a whole host of demographic data can be gleaned.

The customer zip code surveys were conducted in May 2014. In total, 522 zip codes were recorded with 30% of the customers originating from the Purcellville zip code 20132. Another 11% of customers came from Round Hill (the next most recorded zip code). Another 22% of customers originated from other adjacent zip codes to Purcellville (Lovettsville, Hamilton, Leesburg, Middleburg, Waterford, and Leesburg). The final 39% of the zip codes originated from other locations (most of which were in nearby communities not adjacent to Purcellville). These results of this survey vary a bit from the 2005 survey where 46% of the customers were from the Purcellville zip code and another 14% were from Round Hill. The key factor in this change is an increase in traffic from outside the immediate area that accounted for 14% in 2005 compared with 39% in this survey.

It is important to note, however, that participation in this survey was small when compared with the 2005 survey and the visitor traffic may be inflated as a result. The increase in visitor traffic, however, is significant by any metric and because this is an update, the data confirms some of the initial trade area definition found in the original study.

2.2.1 Trade Area Definition

The number of visits provides an overall view of customer origin. A more accurate way to evaluate a local customer’s loyalty to the market is placing customer visits in the context of the population of each zip code. This corrects for zip codes that have exceedingly large or small populations that might skew the market penetration data.

2.2.2 Population Data for the Trade Area and Regional Community

Using Nielsen Claritas data and projections, the two zip code primary trade area permanent population is estimated to be 22,857 in 2013. This population increased by a staggering 95.6% since 2000 and is expected to grow by another 9.3% to 24,982 by 2018. (This population is only 4,000 people less than the entire Town of Leesburg in the year 2000!) The following table shows the population of the Town of Purcellville, the Primary Trade Area, the Secondary Trade Area, and comparisons with nearby communities.

It is clear that amidst a region that has enjoyed robust growth on the whole, Purcellville has outpaced that growth with the exception of only a few communities (many of which were very small to begin with). This growth provides the community to capitalize on the “new rooftops” because commercial development traditionally follows residential growth. *It is important to note that the 2004 and 2006 studies predicted this robust growth.* Looking forward, growth across the board is expected to remain strong yet dramatically slow in pace as compared with past growth. This will allow a period of more stability for the retail and commercial markets to “sort out” the demographics and opportunities while providing the Town of Purcellville a chance to be even more proactive in the future.

	Population		Change 2000-2010	Projected Growth		
	2000	2010		2013	2018	2013-2018
US	281,421,942	308,745,538	9.71%	314,861,807	325,322,277	3.32%
Virginia	7,078,681	8,001,024	13.03%	8,207,491	8,565,075	4.36%
PTA	11,684	21,419	83.32%	22,857	24,982	9.30%
STA	6,644	11,011	65.73%	11,766	12,839	9.12%
Purcellville Town	2,844	7,624	168.07%	8,309	9,296	11.88%
Leesburg	27,798	42,931	54.44%	46,005	50,373	9.49%
Hamilton	222	668	200.90%	757	874	15.46%
Round Hill	322	670	108.07%	716	784	9.50%
Berryville	1,997	4,212	110.92%	4,587	5,153	12.34%
Lovettsville	635	1,695	166.93%	1,869	2,115	13.16%
Brambleton	1,961	9,735	396.43%	11,364	13,466	18.50%
Loudoun County	169,427	312,311	84.33%	339,337	377,005	11.10%
Clarke County	12,651	14,034	10.93%	14,468	15,203	5.08%
Warren County	31,543	37,575	19.12%	37,906	38,940	2.73%
Fauquier County	55,202	65,203	18.12%	66,773	69,599	4.23%
Prince William Co.	280,923	402,002	43.10%	433,884	478,975	10.39%
Fairfax County	969,891	1,081,726	11.53%	1,117,733	1,177,669	5.36%
Jefferson Co WV	42,191	53,498	26.80%	55,072	57,107	3.70%
Washington Co MD	131,923	147,430	11.75%	149,061	152,410	2.25%
Frederick Co MD	195,279	233,385	19.51%	240,673	252,190	4.79%
Montgomery Co MD	873,344	971,777	11.27%	1,010,950	1,070,304	5.87%
20132	8,281	15,468	86.79%	16,548	18,138	9.61%
20141	3,403	5,951	74.88%	6,309	6,844	8.48%
20158	2,247	4,172	85.67%	4,528	5,014	10.73%
20180	4,397	6,839	55.54%	7,238	7,825	8.11%

25425	11,175	12,923	15.64%	13,163	13,445	2.14%
21758	4,248	4,943	16.36%	5,056	5,236	3.56%
20175	18,368	27,668	50.63%	29,689	32,507	9.49%
20117	2,918	2,986	2.33%	3,040	3,132	3.03%
20197	1,102	1,943	76.32%	2,093	2,310	10.37%

From an income standpoint, the two zip codes have a median household income of \$119,689. This is nearly identical to Loudoun County with \$119,124 median household income and far higher than the \$63,636 median household income for Virginia.

2.2.3 Population Data for the Trade Area and Regional Community

Household data mirrors that of the population data and provides an additional look at what is expected to happen over the coming five years with Household Growth. A national trend that Purcellville should be aware of is the growth of smaller households nationally. Purcellville likely bucks this trend though as it is very attractive for families.

	Households					
			Change	Projected Growth		
	2000	2010	2000-2010	2013	2018	2013-2018
US	105,480,131	116,716,292	10.65%	119,206,509	123,405,917	3.52%
Virginia	1,847,831	2,047,188	10.79%	2,099,057	2,190,963	4.38%
PTA	4,100	6,969	69.98%	7,329	7,937	8.30%
STA	2,356	3,774	60.19%	4,007	4,346	8.46%
Purcellville Town	970	2,468	154.43%	2,625	2,897	10.36%
Leesburg	10,155	14,494	42.73%	15,475	16,905	9.24%
Hamilton	82	246	200.00%	277	316	14.08%
Round Hill	112	213	90.18%	223	241	8.07%
Berryville	805	1,656	105.71%	1,774	1,978	11.50%
Lovettsville	221	576	160.63%	623	696	11.72%
Brambleton	628	3,093	392.52%	3,573	4,203	17.63%
Loudoun County	59,837	104,583	74.78%	112,568	124,354	10.47%
Clarke County	4,941	5,509	11.50%	5,681	5,987	5.39%
Warren County	12,072	14,085	16.67%	14,163	14,509	2.44%
Fauquier County	19,861	23,658	19.12%	24,250	25,288	4.28%
Prince William County	94,600	130,785	38.25%	140,287	154,424	10.08%
Fairfax County	350,754	391,627	11.65%	404,690	427,024	5.52%
Jefferson Co WV	16,165	19,931	23.30%	20,424	21,093	3.28%
Washington Co MD	49,725	55,687	11.99%	56,204	57,419	2.16%
Frederick Co MD	70,060	84,800	21.04%	87,595	92,013	5.04%
Montgomery Co MD	324,568	357,086	10.02%	370,728	392,501	5.87%
20132	2,891	5,046	74.54%	5,323	5,782	8.62%
20141	1,209	1,923	59.06%	2,006	2,155	7.43%
20158	803	1,421	76.96%	1,539	1,696	10.20%
20180	1,553	2,353	51.51%	2,468	2,650	7.37%
25425	4,336	4,957	14.32%	5,038	5,125	1.73%
21758	1,510	1,759	16.49%	1,788	1,838	2.80%
20175	6,821	9,566	40.24%	10,240	11,183	9.21%
20117	1,259	1,281	1.75%	1,325	1,389	4.83%
20197	376	624	65.96%	665	725	9.02%

2.2.4 Income Data for the Trade Area and Regional Community

These growth numbers alone present a staggering opportunity for continued commercial success in Purcellville. Of course, growth alone does not dictate the success of a commercial venture. Income levels play a critical role in the type of retail development that occurs, the robustness with which it occurs and the quality of the investment.

Purcellville's Town and Primary Trade area income levels are staggering at nearly double that of Virginia (one of the nation's most prosperous states) and far ahead of the national average. The housing unit value is on par with many regional communities and well above state and national median values. The median age of the town is quite young at 35.5 and the average household size confirms that families are attracted to the community. Like many Northern Virginia communities, the commute time exceeds that of the state and nation but is very comparable with peer communities nearby.

Employment/Income							Demographics		
2013							2013		
	Emp. Rate	Unemp. Rate	Not in LF	MHI	AHI	Unit Value	Med Age	HH Size	Avg. Commute Time
US				\$49,297	\$69,637	\$171,345	37.50	2.57	27.75
Virginia				\$62,321	\$87,403	\$229,428	37.80	2.54	29.93
PTA	72.8%	3.1%		\$119,689	\$149,048	\$382,058	38.10	3.09	42.24
STA	68.7%	2.3%		\$116,930	\$159,999	\$368,898	41.40	2.91	44.09
Purcellville Town	75.2%	2.5%	21.9%	\$111,052	\$127,470	\$346,340	35.50	3.14	38.63
Leesburg	72.2%	4.8%	22.7%	\$101,297	\$126,228	\$332,525	33.90	2.94	36.01
Hamilton	72.5%	4.1%	23.5%	\$117,578	\$143,953	\$355,102	41.80	2.73	32.35
Round Hill	76.7%	3.0%	20.3%	\$120,066	\$145,000	\$370,000	36.60	3.21	44.12
Berryville	61.4%	2.0%	36.3%	\$61,239	\$78,894	\$307,213	43.40	2.52	34.39
Lovettsville	67.3%	1.0%	31.1%	\$114,360	\$145,534	\$321,166	37.80	3.00	48.11
Brambleton	81.6%	2.6%	15.2%	\$146,297	\$182,764	\$454,802	30.80	3.18	36.82
Loudoun County	73.6%	3.9%	22.0%	\$119,584	\$152,576	\$367,491	35.50	3.00	36.74
Clarke County	63.2%	2.9%	33.6%	\$73,366	\$92,659	\$328,872	45.70	2.50	37.08
Warren County	64.3%	4.7%	30.9%	\$58,710	\$72,954	\$217,197	39.90	2.63	39.80
Fauquier County	64.2%	4.4%	31.1%	\$84,971	\$111,484	\$292,237	41.50	2.74	41.84
Prince William County	66.9%	4.5%	24.6%	\$94,856	\$117,833	\$286,337	34.40	3.07	42.11
Fairfax County	68.2%	4.2%	26.2%	\$107,0	\$145,9	\$407,88	38.10	2.74	35.24

				34	91	8			
Jefferson Co WV	62.0%	4.8%	33.0%	\$61,70	\$77,74	\$203,98			
Washington Co				9	3	2	39.20	2.63	41.18
MD	58.7%	5.7%	35.4%	\$53,40	\$69,39	\$191,98			
Frederick Co				2	3	9	39.70	2.50	30.03
MD	67.6%	4.7%	27.3%	\$84,19	\$101,6	\$267,52			
Montgomery Co				4	93	9	38.70	2.70	37.36
MD	68.2%	4.9%	26.3%	\$93,06	\$133,0	\$396,32			
				8	65	0	39.00	2.70	37.38
20132	72.2%	3.1%	24.3%	\$118,4	\$149,2	\$378,36			
				91	97	9	38.10	3.07	41.61
20141	74.4%	3.1%	22.3%	\$122,4	\$148,3	\$391,23			
				52	86	9	38.00	3.14	43.87
20158	71.3%	4.1%	24.6%	\$120,6	\$158,0	\$405,34			
				15	43	0	41.10	2.88	35.53
20180	67.1%	1.2%	31.0%	\$115,2	\$161,2	\$352,76			
				81	20	2	41.30	2.93	49.57
25425	61.1%	4.6%	34.0%	\$68,44	\$84,45	\$207,11			
				2	5	3	41.10	2.60	48.44
21758	67.4%	2.9%	28.6%	\$80,35	\$100,7	\$250,87			
				7	54	0	41.50	2.82	44.37
20175	70.0%	4.2%	25.6%	\$115,7	\$144,6	\$373,88			
				84	25	2	36.10	2.87	36.24
20117	60.9%	3.5%	35.6%	\$107,0	\$160,9	\$525,77			
				19	72	3	48.20	2.25	40.37
20197	65.4%	3.9%	30.6%	\$129,8	\$188,2	\$500,00			
				08	29	0	41.30	3.15	38.97

2.3 Retail Market Analysis

Purcellville is a retail center primarily serving the two zip codes outlined above. In this section, the two zip codes that comprise the Purcellville Primary Trade Area will be examined to identify potential opportunities for new or expanded stores by examining the local population spending compared with what stores in Purcellville sell. This will allow the community to assess what kind of additional stores types might be attracted to Purcellville and will help individual existing businesses understand how they might diversify product lines based on the local customer traffic.

2.3.1 Retail Market Potential in the Trade Areas

Retail market potential refers to the difference between the retail expenditures by residents living in a particular area and the retail sales produced by the stores located in the same area. If desired products are not available within that area, consumers will travel to other places or use different methods to obtain those products. Consequently, the dollars spent outside of the area are said to be “leaking.” If a community is a major retail center with a variety of stores, it will be “attracting” rather than “leaking” retail sales. Even large communities may see retail market potential in certain retail categories while some small communities may be attractors in categories. The two zip code trade areas that include Purcellville has a significant leakage of spending. Local customers in the two zip codes do not get the retail goods locally, forcing them to make changes in their shopping patterns.

Such an analysis is not an exact science. In some cases, large retail market potential in certain categories may indicate that money is being spent elsewhere (drug store purchases at Target or apparel purchases through the internet). It is important to note that this analysis accounts best for retail categories where households (rather than businesses) are essentially the only consumer groups. For example, lumberyards may have business sales that are not accounted for in consumer expenditures. Stores such as jewelry shops and clothing stores are more accurately analyzed using this technique.

The market potential study for Purcellville is a “snapshot” in time and based on local traffic. Consequently, there are factors that point to this being a *much* more conservative look at retail potential. For example, the demographic data points to robust population growth in the Primary Trade Area. More rooftops and more economic vitality with existing families translate into ongoing support for existing and future retail in the community and particularly downtown. Another important factor that makes these results conservative is visitor traffic, which is a significant component for some businesses in the Purcellville market.

With these conservative factors in mind (meaning our numbers represent “minimum” potential and not “maximum” potential), the primary trade area selected store sales equaled \$254 million in 2013 while consumers in the three zip codes spent \$449 million (Source: Claritas). As a result, the Purcellville primary trade area is *leaking* \$195 million in potential annually.

Yet this is not happening in all retail categories. Grocery stores have a significant net gain in sales (something not seen in 2005). Other categories such as nurseries and garden centers, home furnishings, and florists see a small gain in sales. Just about every other retail category from clothing to dining *leaks* sales.

2.3.2 Detailed Retail Market Opportunity Tables

Section 2.3.1 explores the retail trade patterns in aggregate, the tables on the following pages explore the individual retail categories where Purcellville is leaking and gaining sales in the Primary Trade Area. *This data should be used as an overall guide to retail market potential and should not substitute for detailed market research on the part of any business wishing to open in the area. While market support for a category may be an indicator of success, there are many factors (location, business plan and financing, customer service, product selection) that can contribute to the failure of a retail enterprise. Please note that some categories are subsets of larger categories.*

As mentioned, Purcellville is gaining sales in a few notable store types. These details are shown on the table on the following two pages. The source for this information is Nielsen Inc. Nielsen uses a complex allocation model to assign sales across a larger geography so smaller geographies often have sales reflected from businesses that are nearby but not within the zip code. Consequently, a percentage of certain store type sales may be allocated to Purcellville from adjacent geographies.

Retail Stores	2013 Demand (Consumer Expenditures)	2013 Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	449,625,543	254,306,863	195,318,680
Motor Vehicle and Parts Dealers-441	85,631,714	17,134,684	68,497,030
Automotive Dealers-4411	70,960,150	8,261,166	62,698,984
Other Motor Vehicle Dealers-4412	7,717,311	3,606,631	4,110,680
Automotive Parts/Accsrs, Tire Stores-4413	6,954,253	5,266,887	1,687,366
Furniture and Home Furnishings Stores-442	10,406,328	9,084,971	1,321,357
Furniture Stores-4421	5,948,499	3,991,473	1,957,026
Home Furnishing Stores-4422	4,457,829	5,093,498	(635,669)
Electronics and Appliance Stores-443	8,638,106	2,505,083	6,133,023
Appliances, TVs, Electronics Stores-44311	6,361,629	2,340,125	4,021,504
Household Appliances Stores-443111	1,164,556	0	1,164,556
Radio, Television, Electronics Stores-443112	5,197,073	2,340,125	2,856,948
Computer and Software Stores-44312	2,028,664	164,958	1,863,706
Camera/Photographic Equipment Stores-44313	247,813	0	247,813
Building Material, Garden Equip Stores -444	46,813,214	23,822,244	22,990,970
Building Material and Supply Dealers-4441	41,982,893	16,952,751	25,030,142
Lawn, Garden Equipment Stores-4442	4,830,321	6,869,493	(2,039,172)
Food and Beverage Stores-445	50,845,027	146,090,671	(95,245,644)
Grocery Stores-4451	43,746,170	142,946,456	(99,200,286)
Supermarkets, Grocery Stores-44511	41,641,814	136,650,194	(95,008,380)
Convenience Stores-44512	2,104,356	6,296,262	(4,191,906)
Specialty Food Stores-4452	3,656,632	3,073,177	583,455
Beer, Wine and Liquor Stores-4453	3,442,225	71,038	3,371,187
Health and Personal Care Stores-446	21,902,963	6,000,709	15,902,254
Pharmacies and Drug Stores-44611	16,975,106	4,435,416	12,539,690
Cosmetics, Beauty Supplies, Perfume-44612	1,488,087	674,158	813,929
Optical Goods Stores-44613	1,522,661	459,279	1,063,382
Other Health and Personal Care Stores-44619	1,917,109	431,856	1,485,253

Retail Stores	2013 Demand (Consumer Expenditures)	2013 Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	42,408,321	4,258,315	38,150,006
Gasoline Stations With Conv Stores-44711	30,475,042	0	30,475,042
Other Gasoline Stations-44719	11,933,279	4,258,315	7,674,964
Clothing and Clothing Accessories Stores-448	24,103,471	5,114,793	18,988,678
Clothing Stores-4481	17,539,483	4,959,367	12,580,116
Men's Clothing Stores-44811	973,243	0	973,243
Women's Clothing Stores-44812	3,856,903	1,404,356	2,452,547
Children's, Infants Clothing Stores-44813	1,221,067	0	1,221,067
Family Clothing Stores-44814	9,196,280	0	9,196,280
Clothing Accessories Stores-44815	771,891	987,168	(215,277)
Other Clothing Stores-44819	1,520,099	2,567,843	(1,047,744)
Shoe Stores-4482	2,494,019	0	2,494,019
Jewelry, Luggage, Leather Goods Stores-4483	4,069,969	155,426	3,914,543
Jewelry Stores-44831	3,855,239	155,426	3,699,813
Luggage and Leather Goods Stores-44832	214,730	0	214,730
Sporting Goods, Hobby, Book, Music Stores-451	9,201,726	5,163,517	4,038,209
Sporting Goods, Hobby, Musical Inst.-4511	6,672,109	4,610,682	2,061,427
Sporting Goods Stores-45111	3,702,256	3,356,057	346,199
Hobby, Toys and Games Stores-45112	1,764,707	250,983	1,513,724
Sew/Needlework/Piece Goods Stores-45113	699,455	691,446	8,009
Musical Instrument Stores-45114	505,691	312,196	193,495
Book, Periodical and Music Stores-4512	2,529,617	552,835	1,976,782
Book Stores and News Dealers-45121	2,196,822	399,762	1,797,060
Book Stores-451211	2,053,350	399,762	1,653,588
News Dealers and Newsstands-451212	143,472	0	143,472
Prerecorded Tapes, CDs,Stores-45122	332,795	153,073	179,722
General Merchandise Stores-452	56,423,569	1,858,234	54,565,335
Department Stores Excl Leased Depts-4521	24,340,681	1,632,150	22,708,531
Other General Merchandise Stores-4529	32,082,888	226,084	31,856,804
Miscellaneous Store Retailers-453	12,252,300	4,604,060	7,648,240
Florists-4531	654,382	810,958	(156,576)
Office Supplies, Stationery, Gift Stores-4532	4,276,512	1,287,445	2,989,067
Office Supplies and Stationery Stores-45321	2,380,640	0	2,380,640
Gift, Novelty and Souvenir Stores-45322	1,895,872	1,287,445	608,427
Used Merchandise Stores-4533	1,365,771	773,968	591,803
Other Miscellaneous Store Retailers-4539	5,955,635	1,731,689	4,223,946
Non-Store Retailers-454	34,471,665	2,107,824	32,363,841
Foodservice and Drinking Places-722	46,527,139	26,561,758	19,965,381
Full-Service Restaurants-7221	21,801,938	18,845,378	2,956,560
Limited-Service Eating Places-7222	18,835,451	7,226,801	11,608,650
Special Foodservices-7223	3,675,556	489,579	3,185,977
Drinking Places -Alcoholic Beverages-7224	2,214,194	0	2,214,194

For the most part, Purcellville continues to leak sales in nearly every retail category. This is a function of several factors. First, the retail strength of Leesburg is likely to eclipse that of Purcellville unless a significant market change occurs (very unlikely). Second, the 70% growth of the community's residential population between 2000 and 2010 in the Primary Trade Area has outpaced the ability of retailers to "catch up." For any who may question the possibility of a big box general retail store in Purcellville, there is certainly pent up demand for such a store type. Having said that, the demand is not so substantial to support a "supercenter" store. Furthermore, regulations severely inhibit a large box store to locate within the town even if there was a market for such a store type.

Clothing stores remain a major leakage category for Purcellville. It is unlikely that the community will ever be able to trump the powerhouse of having Leesburg Corner Premium Outlets nearby which serves as a super-regional outlet mall with a predominance of clothing retailers. Having said that, niche clothing stores that cater to the local population (high-end consignments, children's clothes) represent opportunities for the community.

There are also a couple of anomalous findings in the chart that are easily explained. First, drinking places/alcoholic beverages seldom turn up with sales in Virginia due to state liquor regulations. Second, the supply of relatively new pharmacies may not register on the list or one of the pharmacies is being categorized in the grocery store category.

Additional, more detailed descriptions of the categories with the most opportunity for success in Purcellville are covered in section 2.5 of this chapter.

2.4 Retail Shares Analysis

A retail shares analysis, unlike a retail market potential analysis, looks at a locality and benchmarks local sales against a larger geography. For Purcellville, the most logical comparison is sales within the community as compared with that of Loudoun County as a whole. The Primary Trade Area for Purcellville (the Purcellville and Round Hill zip codes) represents \$254.3 million in sales. Loudoun County is a retail powerhouse with overall sales totaling \$8.4 billion in sales. Purcellville represents a small 3.0% of the total retail sales in Loudoun County. This 3.0% mark becomes the benchmark for evaluating in what retail categories the community is a strong performer when compared to the region. Food and beverage stores (grocers), used merchandise (antiques) are the most notable strengths in addition to "miscellaneous retail" which is highly specialized retail that cannot be easily put in another category.

The chart on the next page, Retail Shares Analysis, also indicates that the full service restaurant category that was of such concern in the 2006 study has "caught up" and even exceeded Purcellville's share of the county's market. Quick service restaurants still lag.

Finally, the Retail Shares Analysis chart shows key areas where Purcellville underperforms. Gasoline stations surprisingly represent less than their "fair share" in the county. More understandably, motor vehicle and parts dealers, clothing stores, and general merchandise stores (Target, Walmart, dollar stores such as Family Dollar and Dollar General) all are under-represented in the market and are indicated in red shading in the following chart.

Retail Shares Analysis	Sales		Share %
	PTA	Loudoun Co	
Total Retail Sales	254,306,863	8,381,714,562	3.0%
Food and Beverage Stores	146,090,671	1,074,692,545	13.6%
Miscellaneous Store Retailers	4,604,060	93,770,306	4.9%
Gift, Novelty and Souvenir Stores	1,287,445	26,391,775	4.9%
Used Merchandise Stores	773,968	7,737,873	10.0%
Other Miscellaneous Store Retailers	1,731,689	32,155,869	5.4%
Furniture and Home Furnishings Stores	9,084,971	206,335,228	4.4%
Building Material, Garden Equip Stores	23,822,244	552,300,344	4.3%
Sporting Goods, Hobby, Book, Music Stores	5,163,517	126,166,236	4.1%
Foodservice and Drinking Places	26,561,758	930,344,513	2.9%
Full-Service Restaurants	18,845,378	402,581,839	4.7%
Limited-Service Eating Places	7,226,801	399,882,808	1.8%
Health and Personal Care Stores	6,000,709	214,021,879	2.8%
Electronics and Appliance Stores	2,505,083	114,349,424	2.2%
Gasoline Stations	4,258,315	490,171,704	0.9%
Motor Vehicle and Parts Dealers	17,134,684	2,068,524,893	0.8%
Clothing and Clothing Accessories Stores	5,114,793	1,166,549,501	0.4%
General Merchandise Stores	1,858,234	1,091,906,543	0.2%

2.5 Retail Capture Scenario

A retail capture scenario simply looks at the market leakage, identifies categories where the leakage amounts are significant enough to support a store type and assigns a “hypothetical” capture rate. For Purcellville, a 20% capture rate was used which still allows for 4 out of every 5 dollars in the primary trade area to leak from the community.

The Urban Land Institute (ULI) publication “Dollars and Cents of Shopping Centers” is used to assign sales per square foot amount and the total capture is calculated. This table should be used as a tool to evaluate market potential. Not every store type will actually have a 20% capture rate (clothing for example). Others may be able to capture a disproportionate amount of customers. Still others may allow for Purcellville to attract more visitors.

In total, the chart on the following page indicates existing support for 192,454 square feet of additional retail space not accounting for growth in the market. This robust number is contingent on policies, financing, and the competitive nature of the regional market with Leesburg nearby but does indicate a broad barometer of what kind of retail the community can support.

Retail Stores	Primary	20% of PTA Outflow	Sales per Square Foot	Calculated Capture
Selected Retail Categories Below	195,318,680	30,267,705		192,454
Furniture Stores	1,957,026	391,405	141.84	2,759
Household Appliances Stores	1,164,556	232,911	245.44	949
Radio, Television, Electronics Stores	2,856,948	571,390	207.17	2,758
Computer and Software Stores	1,863,706	372,741	207.17	1,799
Building Material and Supply Dealers	25,030,142	5,006,028	142.38	35,160
Health and Personal Care Stores	15,902,254	3,180,451	247.29	12,861
Clothing and Clothing Accessories Stores	12,580,116	2,516,023	164.60	15,286
Women's Accessory & Specialty	2,452,547	490,509	164.60	2,980
Shoe Stores	2,494,019	498,804	158.81	3,141
Jewelry Stores	3,699,813	739,963	263.92	2,804
Sporting Goods Stores	346,199	69,240	153.46	451
Hobby, Toys and Games Stores	1,513,724	302,745	146.28	2,070
Book Stores	1,653,588	330,718	161.16	2,052
General Merchandise Stores	54,565,335	10,913,067	179.90	81,502
Gift, Novelty and Souvenir Stores	608,427	121,685	168.55	722
Foodservice and Drinking Places	19,965,381	3,993,076	201.63	19,804
Drinking Places -Alcoholic Beverages	2,214,194	442,839	88.07	5,028

2.6 Key Market Conclusions and Opportunities

2.6.1 Observations

The local trade area population in Purcellville grew by 83% between 2000 and 2010 and continues to be a small but important part of a very quickly changing and dynamic region. Purcellville's downtown has a significant opportunity to capture a portion of that market both to support existing retail, restaurants, and services in the town but also to be potential investors, residents, and owners. However, investment in the community should not be limited solely to downtown. East Main Street, Hirst Road, and other commercial sections of the community could witness redevelopment and new development as the community grows.

Purcellville has done an excellent job of setting the stage for future investment in downtown and throughout the community. The community should continue to build on and expand existing efforts like the Shop Purcellville campaign possibly with a non-profit or for-profit entity taking a lead role. Such an effort managed consistently can evolve into a savvy way to retain customers. The community should also continue the "In the Heart of DC's Wine Country" marketing to capture the growing and important visitor market. Doing the latter does not mean that Purcellville should directly market to visitors in national media with the limited budget available to the community. The local wineries and Visit Loudoun can be key partners in helping to market Purcellville as a jumping off point for the visitor attractions in the community. The EDAC's proposed tourism plan and the Tourism section of the Town's Comprehensive Plan show the importance of a planning for a growing visitor market.

Two major shifts have occurred in Purcellville since the 2005 study. First, grocery store sales in the community have ballooned from \$49 million in 2006 to \$142 million in 2014 as stores have caught up to the population growth. The community is clearly a destination for grocery shopping to the point now that it is likely saturated with grocers. The existing grocery stores in Purcellville present an

opportunity to communicate with a broader regional audience as shoppers regularly visit these stores and they present a way for visitors to see what else is going on in the community. Some communities have placed well designed kiosks at locales like grocery stores to keep people informed of area happenings.

The second major shift is in dining. While Purcellville still indicates a need for additional full-service dining, the gap narrowed from \$11 million in retail market potential in sit-down dining in 2005 to only \$2.9 million in 2013. The demand for “limited service” dining however has increased significantly from \$6.7 million in 2005 to \$11.6 million in 2013. Overall, the move to add an additional food and beverage tax in Purcellville was fiscally wise for several reasons. First, local residents do not consume many of the meals purchased in Purcellville even though there is still a gap in sales that presents retail market potential. Restaurants tend to attract from the outside area providing a way for the Town to garner revenue from customers “using” the resources of the community. Second, the tax is one that will grow as restaurant sales continue to grow making for a revenue stream that is both reliable and increasing. Finally, the tax provides relief to full-time residents of the community by providing another revenue stream for the Town of Purcellville. Most importantly, the consumer is not checking whether they are paying a penny more for a meal than in a neighboring community.

While Purcellville has grown its retail base significantly, 90% of the business licenses for the community are from locally-owned, non-chain businesses. This bears out even when observing shopping centers that usually cater to “chain type” stores. In Purcellville, many of the adjacent stores are independently owned.

2.6.2 Current Business Opportunities

The retail market potential for Purcellville combines many different facets of the data gathered above. Not simply a collection of numbers, retail markets depend on both quantitative and qualitative information. Moreover, just because there is retail market potential for a potential retail store type in no way ensures the success of that store type in the community. There are many reasons why a business might succeed or fail, and the retail market is but one of those factors. However, this does provide a synopsis guide for the “best potential” retail opportunities in Purcellville.

- General merchandise stores still represent a growth opportunity for Purcellville. Large footprint big box general merchandise stores have been reducing store size to better match the character of local communities. The likelihood of a major general merchandise store in Purcellville is as much dependent on land use policy as it is market potential. Currently, the land use policy in Purcellville inhibits big box retail from locating within the limits of the town. This does not mean that such a store will not attempt to locate in town or nearby.
- Limited service dining could be a growing market for the community. Indications that a new quick service restaurant will be locating at Purcellville gateway will narrow this gap.
- Niche and specialty stores show a significant opportunity in the community. Such stores should be appealing to locals first and to regional visitors as a way to augment sales. With the wineries, breweries, and distillery, the time for more destination shopping in Purcellville has come.

- As mentioned, clothing stores represent a narrow but important opportunity. Nearby Leesburg Premium Outlets tends to skew the entire regional market because of its super-regional clothing sales numbers. However, a well-merchandised store or two could be successful.

With any of these uses, it is important to understand that Purcellville is located adjacent to a retail market in Leesburg of \$2.2 billion (almost ten times bigger than Purcellville’s market). This market *imports* more sales at \$660 million than the entire Purcellville market sells as a whole. This powerhouse of a retail trade area will continue to influence Purcellville’s growth. However, the community has truly come into its own as a location, will continue to grow, and is likely to remain very affluent. All of these factors present an excellent opportunity for retail growth in the community.

2.6.3 Recommended Strategies

The following recommendations are designed to guide the retail economic development portion of the Town’s Comprehensive Plan, corroborate existing studies, and market the community as a place to do business.

Recommendation One: Continue to pursue infill development per the prior plans. Infill development and not additional sprawl are critical to the success of Purcellville. This development should be highly sensitive to the design aesthetic of the community and not try to impose a false “theme” to what remains a charming rural feeling town in spite of the significant growth that has occurred.

Recommendation Two: There are several uses along Main Street that could easily locate to other parts of the town where commercial real estate does not come at such a premium. While these owners should be encouraged to stay as long as they desire, the community should explore ways to discuss future plans along the corridor with existing owners. This would allow for the expansion of quality retail along Main Street between downtown and Purcellville Gateway while allowing for the existing uses such as car repair and dealerships to migrate to industrial areas in town such as Hirst Road.

Recommendation Three: From a policy standpoint, the Town of Purcellville should be proactive on addressing “small box” development. Design guidance that specifically addresses box stores should be provided in the zoning code to ensure that these stores preserve and enhance the character of Purcellville. To date, the community has had excellent results with new retail development being sensitive to the community aesthetic. “Small box” general merchandise stores are likely to be exploring the market in a robust way and the community should be prepared.

Recommendation Four: Continue promotion efforts in partnership with other entities. The opportunity exists for Purcellville to “cement” its role as “In the Heart of DC’s Wine Country” with a gathering place for wine enthusiasts that may have both a tourist and an education component. The community also has the opportunity to take the Shop Purcellville campaign to a new level of participation with non-profit or private sector partners that engage with local merchants and restaurants on a consistent marketing effort.

Recommendation Five: Continue to work on hotel development. A hotel is likely to be independent and smaller than a chain hotel but would be a great contributor to the community. This may afford

Purcellville the chance to explore a partnership with Patrick Henry, which would have the residual effect of attracting more small conferences to the community.

In conclusion, Purcellville has been a proactive partner to enhance the economic vitality of the community for over a decade. It has not “sat back” and reacted to commercial development but instead embraced it as a way to enhance the quality of life for its citizens. As the community looks to the future, this approach will remain essential.

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2014 Tourism Plan

Purcellville, Virginia



Small Town Charm
A Century of Welcoming

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Final report
November 6, 2014

EDAC Committee

Warren Grossman, Chairman
Christie Morgan, Vice Chair
John Nave, Town Council Liaison
Daniel Abramson
Daniella Harris
Melanie Fuller
Carol Sweeney

Town Council

Kwasi Fraser, Mayor
John Nave, Vice Mayor
Joan Lehr
Patrick McConville
Doug McCollum
Karen Jimmerson
Ben Packard

Town Staff

Patrick Sullivan, Community Development Director
Daniel Galindo
Tucker Keller
Stephanie Seay

The Town of Purcellville

The largest town in western Loudoun, Purcellville has long been the hub of commercial activity in the county's western portion. Growth took off when the railroad reached Purcellville in 1874 and increased steadily over the next 50 years, becoming pre-eminent in the early 20th century. Two major fires in 1914 destroyed the town's commercial core on 21st Street and the downtown area slowly declined in importance over the next 50 years. The railroad closed and the 1883 train station was slated for demolition, but was eventually rescued and preserved by the Purcellville Preservation Association.

The decline has reversed over the past decade or so, and North 21st Street is once more thriving with new specialty stores and dining venues as the town continues to boost its downtown commercial area with streetscape and lighting improvements. The restored train station is now owned by the town and is a popular meeting space for town government and public use.

Purcellville's population has grown dramatically over the past decade, spurred by residential and, currently, commercial growth as the town seeks to build its commercial tax base. Currently estimated at an 8,000 population in town, Purcellville's service area has an effective population of 19,000 within a 10 minute drive and 62,000 within a 15 minute drive.

The town is pushing ahead with efforts to install needed transportation improvements, particularly to ease congestions along Main Street/Rt. 7. 21st Street has been turned into a One-way street, other enhancements include traffic lights and low speed zones, new crosswalks and upgrades to existing sidewalks. The Southern Collector Road, long in the making has been completed and is reducing congestion at the corner of Main and 287 (Berlin Turnpike).

Utilities are in good shape, with the expanded Basham Simms Wastewater Treatment Plant and a comprehensive new maintenance facility; upgrades to sewer lines and water mains continue along with bringing on line several new water resources to boost the town's supply.

Along with the ongoing construction, town leaders are determined to retain the small-town character of Purcellville while achieving the economy of scale necessary to provide needed services and programs to residents in coming years.

To protect that character, the town uses a number of advisory commissions, boards and committees to protect and further enhance its historic architecture as well as promoting the town's street tree canopy and other environmental features.

The town has received state recognition for its environmental and green projects.

Along with a push to revitalize the downtown area is the town's commitment to augment its commercial base. The goal is to achieve a 70 – 30 split between commercial and residential assessments. The town has simplified its ordinances pertaining to development review, landscaping requirements and site regulations to make it easier for companies to do business in Purcellville in a move that is beginning to pay dividends. The Community Development Department brings a focus on seeking and retaining new

business operators in town. Simultaneously, the town is focusing on reversing the current trend of considerable loss of shopping power to other jurisdictions, notably Leesburg.

The town has two high schools: Loudoun Valley High School and Woodgrove High School.

As part of the push to increase tourism within its borders the Town has initiated and supported a variety of special events. The events calendar now boasts numerous months throughout the summer, fall and winter. The town wide Tag Sale, held each October, has grown into a major promotional event for the town, drawing close to 8,000 visitors to town. The Loudoun Wine Expo in February has also grown into a major event for the Town. In addition there are numerous holiday parades, block parties, road races, music and sports events on a regular basis.

With the build out of the Purcellville Gateway complex at the eastern end of Town visitors can now enjoy three new full service restaurants. Award winning Magnolia's at the Mill is a major anchor for our downtown area and continues to serve up award winning cuisine. Purcellville is also home to three microbreweries and a distillery. All provide tours and tastings.

•VITAL STATISTICS

Incorporated: 1908

Area: 3.2 square miles

2014 Population: 8,100

Households: 2,525

Median Age: 34.7

Main Access Roads: Rt. 7, Rt. 287, Rt. 690, Rt. 722, Rt. 611

Address: 221 N Nursery Ave, Purcellville, VA 20132

Website: www.purcellvilleva.gov

Real Estate Tax Rate: (2014) \$0.21 per \$100 of assessed value

Personal Property Tax Rate: (2014) \$1.05 per \$100 of assessed value for vehicles; \$0.55 for machinery and tools, computers and business personal property

Meals Tax: 5 percent

Cigarette Tax: \$0.50

Water/Sewer Rates: See website, www.purcellvilleva.gov for rate details in different categories

Background

Purcellville is an award-winning town of nearly 8,100 residents located in Loudoun County, approximately 40 miles west of Washington, DC. It has been honored for its green initiatives, most recently with the prestigious Siemens Sustainability Award for Small Communities. Purcellville was a stop along the W&OD rail line and has maintained its historic old-town feel through the restoration and maintenance of its many downtown structures, reflecting the Victorian architecture popular during the early 1900s. Today, Purcellville is the economic hub of western Loudoun County and a popular weekend destination for antiquing, entertainment, farmer's markets, breweries, distilleries, wineries and restaurants.

Purcellville has long been known as the "Gateway" to western Loudoun County and its many assets; more recently it is becoming known for its festivals and events. However, growth in this area has not been an interconnected effort. The festivals and events have been successful despite the fact that there has not been a strategic plan in place to guide the Town's as it moves toward establishing tourism as a cohesive economic engine for the community. In 2013 the Purcellville Town Council charged the Economic Development Advisory Committee with producing a Tourism Plan that would help provide guidance for managing the numerous existing events that the Town presently offers and provide a framework for the establishment of future tourism events. Along with that initiative the Plan would address such areas as marketing, goals and objectives, asset enhancement, tourism partnerships, and infrastructure.

Why a tourism plan?

Tourism is a logical next step for the Town of Purcellville as it has already started the ball rolling with numerous festivals and events. Purcellville is a small community still rural in nature which is located at the western end of a gradually expanding suburban transect as it expands west from the dense urban core of DC. Tourism is a means and a method to maintain that small town feel yet at the same time provide an oasis for visitors from urban areas to enjoy themselves and create a strong economic base for the community.

The Arnett Muldrow 2014 Market Study (*see appendix 1*) update suggests that: *Regular events can edify residents' association with downtown and their hometown. **They also attract regional visitors that learn about a community and can be converted into more consistent customers.** Purcellville's Music and Arts Festival, the award-winning Purcellville Wine and Food Festival, and the Loudoun Grown Expo coupled with regular wine tastings at the Visitors Center and additional events throughout the year have greatly rounded out ways that customers can interact with downtown. In addition to adding festivals and events, the Town has worked with Virginia Tech to track the economic impact of the Wine and Food Festival on the town providing empirical data that show **these activities are drivers of spending in the community.*** (emphasis added)

Visit Loudoun, the County's tourism marketing arm, looked at the impact of tourism and found that: *In 2009 the economic impact of tourism on Loudoun County was \$59 million. This means that every*

household in Loudoun County paid \$602 less in taxes thanks to visitor spending here! (Source: Virginia Tourism Corporation)

Tourism: Significant to Loudoun's Economy, Businesses, and Residents

Tourism is one of Loudoun's major industries, employing more than 16,000 people in 2005. The county and its residents benefit in many ways from the expenditures by visitors who spend their time and money here but do not require schools and other public services:

- *It creates jobs*
- *It brings income to Loudoun's economy*
- *It is a catalyst for preservation and economic development*
- *It provides a better quality of life*
- *It helps create civic pride.* (Source: Visit Loudoun, <http://www.visitloudoun.org/tourism-industry>)

The same will hold true for the Town of Purcellville. A strong tourism market will reduce taxes, increase jobs and overall will help maintain and enhance a superior quality of services for its residents.

SWOT Analysis

Strengths, weaknesses, opportunities and threats are the building blocks of the plan. We need to know how to play to our strengths, recognize our weaknesses, seize opportunities and counter threats. The analysis conducted is comprehensive. Strengths are our important assets. They are the products that we present to the public that encourages them to visit Purcellville. The Loudoun Grown Expo is a good example of a product that we have to sell to the public. The expo is one of our best assets and is a strong part of the Town's numerous festivals and events. In addition to the festivals and events the Town has numerous other assets which help make up our unique and significant strengths. Examples would be the W&OD trail, three breweries and a world class distillery, a growing retail base and some of the finest restaurants in the County. These assets and products form the foundation of our tourism plan for without them we would have little to offer our visitors who seek enjoyment, entertainment, education, a one of a kind brew and those great little finds at our many antique and consignment stores. The SWOT analysis helps us determine the next steps to take.

SWOT ANALYSIS

Strengths:

- Proximity to Washington D.C.
- Historic elements in the Town
- W&OD trail- equestrian paths, runners
- Multiple dining outlets
- Appalachian Trail
- Strong wine industry in the surrounding areas
- Recreation - Franklin Park, Fireman's Field, High Schools, Patrick Henry College, and Carver Center
- Outdoor recreational activities including fishing, kayaking, hiking
- Growing retail base
- Distillery (lot of places to drink)
- Two Farmer's Markets
- Meeting Space at Patrick Henry College
- Cultural heritage
- Transportation- good access right off of Route 7
- Reputation
- Attractive drive from city- Scenic drives in area.
- Tree Farms/Holiday Season- Multiple tree farms in the surrounding area and Purcellville Marketplace has a reputation as a place to purchase holiday items
- Holiday parades
- Loudoun Grown Expo
- Wine and Food Festival
- Tag Sale
- Block parties

SWOT ANALYSIS

Weaknesses:

How do we take our weaknesses and turn them into an opportunity?

- Lack of an identity to outsiders.
- Lack lodging. Considered our biggest weakness.
- No real gateway when you come off of Route 7.
- Visually unappealing when entering the Town
- Lack of a website for marketing purposes
- Not enough way-finding signs for the historic district
- Not focused in our marketing all of the bikers who come here and ride the W&OD?
- Limited parking on 21st street.
- Unaware of public parking spaces
- Failure to focus on one strong identity.
- Not focused on the externals (out of town)
- Franklin Park not utilized as an asset.
- Confusion about the Town's future growth.
- Traffic congestion on Main Street. Parking lots need to be better promoted.
- Our three commercial centers are spread out which isn't conducive to pedestrian traffic and requires visitors to drive between centers.
- Not taking advantage of more state funding.
- Car dealers not visually attractive. Hurts visual perception of Purcellville.
- Inadequate marketing
- Advertising limitations. (weekly papers only)

SWOT ANALYSIS

Opportunities:

Elements that the project can exploit to its advantage.

- **Nearby attractions**
- **The Purcellville Business Association as well as the 21st Street Association**
- **Focus on main revenue sources**
- **Large web based email data base**
- **Better utilization of the Train Station**
- **Fireman's Field**
- **Town Park next to Fireman's Field**
- **The Town website- opportunity is to enhance it**
- **Public Relations- the Town's Marketing consultant Samantha Villgas can help with branding and other marketing initiatives**
- **Agribusiness- a large amount of visitors to the wineries in the surrounding area currently are not visiting the Town**
- **W&OD Bike trail**
- **Train Station/Visitor Center**
- **Social Media (Facebook/Twitter)**
- **Google Earth**
- **Bus Ads at Maintenance facility**
- **Babe Ruth World Series. Expansion**

SWOT ANALYSIS

Threats:

Elements in the environment that could cause trouble for businesses or projects; an exterior force that is threatening our community. Threats can be internal or external.

- Traffic
- Lack of identity/focus/vision- weakness
- Our neighboring Towns are drawing the tourists away from Purcellville
- High availability fees (water/sewer), we are not as competitive because the fees are lower in other Towns
- Anti-growth groups
- Lack of commercial space (70% residential, 30% commercial)
- Lack of information on neighboring towns operations (financial streams, taxing purposes) which doesn't help Purcellville to learn from previous mistakes so they won't be repeated.
- Lose of the Babe Ruth World Series
- Restaurant tax – is it too high? Does it discourage people from dining in the Town? Does it discourage restaurateurs from opening new restaurants?
- Threat of loss
- Competition
- Competitive incentives
- Future threat, long range sustainability of the businesses that we currently have

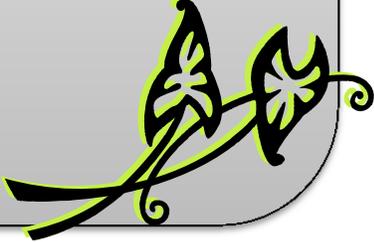
The Vision

The Economic Development Advisory Committee (EDAC) set out to create a framework to help realize a tourism plan for the community. The committee developed a vision and a set of strategic goals and objectives to help stimulate progress in establishing a cohesive plan. This plan is meant to serve as a “straw man”, a first step in engaging the community and its visitors in developing a strong economic base or foundation through tourism.

“Purcellville will be an easy day trip destination providing a diversity of experiences for all who visit with unique attractions, special events, small town charm, recreational offerings and of course ... wineries, breweries, distilleries, and great restaurants.” This is the vision. It recognizes that we are not a multi-day destination but rather a day trip destination. The vision empowers the Town to seek means and methods to attract people to Purcellville.



Purcellville will be an easy **DAY TRIP** destination providing a diversity of experiences for all who visit with unique attractions, special events, small town charm, recreational offerings and of course wineries, breweries, distilleries, **AND GREAT RESTAURANTS**



The Vision

Vision



Goals

The vision fosters the goals for the Plan. Using the vision and the SWOT analysis the committee put forth 4 goals for the Plan.

Tourism Plan Goals

1. **Identify, add to, and enhance the assets/products that promote tourism** in the Town of Purcellville and create a visitor experience next to none. *(Products)*

2. **Reach potential visitors.** Communicate and promote our tourism intentions. *(Marketing)*

3. **Forge tourism partnerships.** *(Partnerships)*

4. **Maintain sense of place.** Develop and promote tourism in a sustainable way to avoid inappropriate development. *(Policies & Infrastructure)*



1. Identify, add to, enhance the Assets/products that promote tourism in the Town of Purcellville and create a visitor experience next to none. (Products)

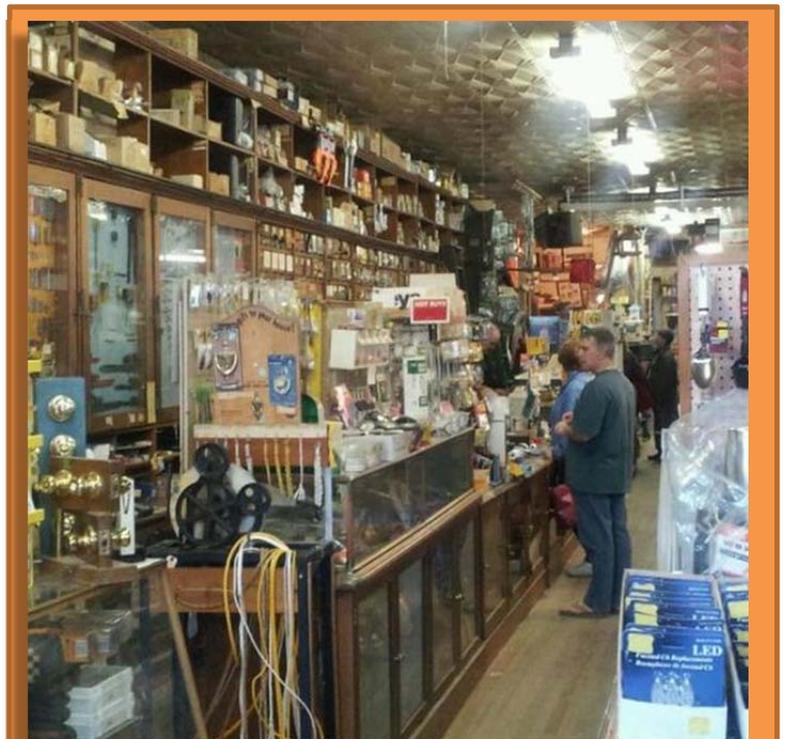
The first goal focuses on the Town’s assets or products. Assets or products are those items that the Town either publically or privately produces to attract people to the Town so that they will spend money which in turn helps create jobs, lowers taxes, provides customers for local businesses and ultimately creates a strong economic foundation. An example of an asset is the annual Loudoun Grown Expo. The Expo draws thousands of people from outside the Town who visit Purcellville for a day, spend a significant amount of money and then return home. This type of asset helps introduce people to the Town and provides an incentive to return.

Assets come in all shapes and sizes, from restaurants to baseball games to Nichols Hardware Store to the Victorian houses along Main Street. It is important to identify the assets and then promote and protect them. They are the inner workings of our economic tourism base.

These assets also help the existing business base grow and expand. The following types of businesses can be considered primary tourism markets and increases in tourism population will see increased revenues directed towards these markets.

Types of Primary Tourism Expenditure Businesses

- Retail purchases, antiques, art, boutique items, tourism items, bicycles, sports equipment, etc.
- Restaurant meals, other food purchases
- Gate revenue at festivals
- Gasoline
- Specialty items (t-shirts, wine glasses)
- Beer, Wine, Liquor
- Concerts
- Sports events
- Grocery items
- Tours
- Tag sales, flea markets, sidewalk sales
- Hotels, (future)



Nichols Hardware



2. Reach potential visitors. Communicate and promote our tourism intentions. *(Marketing)*

Marketing is a critical goal. Without it we have no way of letting people know about our assets and products. A good plan will provide for the means and the methods to identify and reach out to the appropriate markets.



3. Forge Tourism Partnerships. *(Partnerships)*

Working with our counterparts both far and wide strengthens our message. Partnerships should not be limited to public or non-profit organizations. Partnerships should be formed anywhere they can further the vision and benefit the community.

Virginia 
is for Lovers[®]



Goals



4. Maintain Sense of Place (*Policies and Infrastructure*)

This goal reminds us that we should develop and promote tourism in a sustainable way so that inappropriate development is avoided. The policies, the infrastructure, and the legislation should all be viewed as a means to an end that will enhance the quality of life for the community.



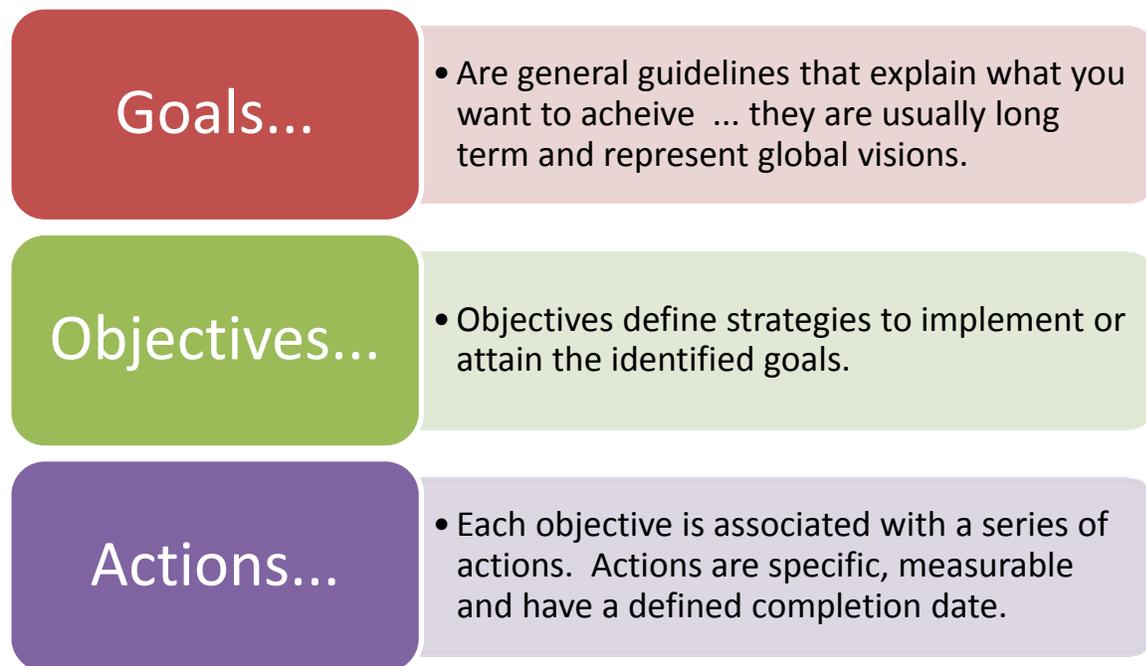
Catoctin Creek Distillery



Goals, Objectives and Actions

The implementation of the plan depends on the identification of objectives that will help realize the Goals. Once the objectives are itemized, actions necessary to implement the objectives are determined and spelled out in the plan. Actions spring from Objectives and objectives spring from Goals. As an example, the first Goal is to “identify, add to, and enhance the assets/products that promote tourism...” In order to achieve this Goal there is a need to identify certain objectives that will implement the Goal. In this case, Objective 2 calls for the promotion and enhancement of Purcellville’s downtown. Some of the Actions that could be taken to reach the Objective would be to hold a sidewalk sale or to encourage artists to have an art show on the street. This process is repeated throughout for each Goal with the identification of the appropriate Objectives for each Goal followed by the necessary Action that will implement the Objective.

This should be a dynamic process that adapts to changing situations and needs. It should be reviewed often.



Goals, Objectives and Actions

Goal 1. Identify, add to, enhance the Tourism Products that Purcellville has to offer.

Objective 1. Promote regional art and artists

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Paint a wine country mural on the wall at It's Bizarre. Do a call for Artists spring of 2015	\$	Short Term	Arts Council EDAC
Action 2.	Contact art council and discuss what is needed to promote the arts	\$	On going	
Action 3.	Conduct an annual juried art show	\$\$	Medium Term	
Action 4.	Support Franklin Park Arts	\$	On going	

Expected results: Purcellville will become the hub for Western Loudoun arts

Possible Resources: Volunteers, Visit Loudoun, high school students Doc Wiley's wife, Parks and Rec

Objective 2. Promote and enhance Purcellville's Downtown

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Create W&OD bike event ending in a block party on 21 st Street	\$	Medium Term	Arts Council EDAC
Action 2.	Hold sidewalk sales (could be throughout the Town)	\$	Medium	
Action 3.	Create kids events downtown	\$	Short Term	
Action 4.	Add a water feature in the train station area	\$\$\$	Long Term	
Action 5.	Add greenery to the street	\$\$	Medium Term	

Action 6.	Add benches along the street	\$\$\$\$	Long Term	
Action 7.	Artists events in downtown and shopping centers	\$	Short Term	Merchants, Arts Council
Action 8.	Shopping events	\$	Short Term	Merchants

Expected Results: Increased visibility and vibrancy for the downtown

Possible Resources: Businesses, Merchants, Town, sponsors

Objective 3. Recruit hotel accommodations

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Gather data on the need for a hotel	\$	Short Term	Community Development
Action 2.	Meet with potential hoteliers	\$	As needed	Community Development

Expected Results: Opening of a hotel within the town limits

Possible Resources: Local realtors, town Community Development staff

Objective 4. Promote, enhance, recruit breweries, wineries and distilleries

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Create a fall chili / beer event in September to highlight local producers	\$\$	Medium Term	TBD
Action 2.	Octoberfest	\$\$	Medium Term	TBD
Action 3.	Transportation to wineries and breweries	\$	Medium Term	TBD

Expected Results: Increased business and awareness for wineries, breweries and distilleries Possible Resources: local merchants in this field, Wine Association, Lothar.

Objective 5. Develop, enhance, and add signature events and festivals within the Town’s borders

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Support existing events and festivals	\$	On going	Town, EDAC
Action 2.	Actively recruit new events and festivals	\$	Medium Term	Town, EDAC
Action 3.	Contract with an event producer for turnkey management of designated events	\$\$\$	Medium Term	Town
Action 4.	5K Purcellville Fun Run – Spring 2015	\$S	Short Term	Town, EDAC

Expected Results: Purcellville is the western Loudoun source for festivals and events

Possible Resources: Town Recreation Dept, merchants, shopping center managers, Daniella and EDAC

Objective 6. Promote, enhance, recruit dining experiences

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Hold a taste of Purcellville event (include Round Hill and Hamilton)	\$\$	Long Term	Merchants, EDAC
Action 2.	Publish a restaurant menu booklet or brochure	\$\$	Medium Term	TBD
Action 3.	Cross promote with breweries and restaurants	\$	Medium Term	TBD, Merchants

Expected Results: Increased food and beverage sales, stature as a dining destination

Possible Resources: Restaurant owners

Goal 2. Reach potential visitors. Marketing.

Objective 1. Develop a web tourism site

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Meet with IT to see how to best integrate the tourism web site	\$	Short Term	IT, EDAC, Town
Action 2.	Gather proposals from various website services	\$	Medium Term	EDAC, Town
Action 3.	Get changes in the budget for FY2016	\$\$\$\$	Medium Term	EDAC
Action 4.	For the current Calendar of Events investigate how to make it more visible and accessible on town website	\$\$\$	Short Term	Town, ECAD

Expected Results: Have a seamless resource for the public

Possible Resources: Town Manager

Objective 2. Develop social media accounts for tourism products

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Prepare a report on how to integrate social media with the Town's special events	\$\$	Medium Term	TBD
Action 2.	Create Facebook, Instagram and Twitter accounts for each Town sponsored event	\$\$	Long Term	TBD
Action 3.	Identify a staff member(s) to maintain the social media accounts (Admin? Desk?)	\$\$\$\$	Medium Term	Town

Expected Results: Social media coverage of our in town events

Possible Resources: Interns, and Town administration

Objective 3. Develop a tourism marketing/branding plan for the Town

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Meet with Town’s PI firm to discuss implementation of tourism plan	\$\$	Medium Term	Town, EDAC
Action 2.	Develop brochures, posters etc. to promote the in town events	\$\$\$\$	Medium Term	Town, EDAC
Action 3.	Develop a local calendar of events and festivals	\$\$\$	Medium Term	Town, EDAC
Action 4.	Brand the Town	\$\$\$\$	Long Term	Town, EDAC
Action 5.	Develop a slogan	\$\$	Short Term	Town, EDAC

Expected Results: Effective outreach, Purcellville is recognized as the place to visit

Possible Resources: PI firm, Town

Objective 4. Continue to collect appropriate tourism data to improve future events

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Conduct surveys	\$	As needed	Town
Action 2.	Partner with Visit Loudoun on tourism data gathered by them and share our data	\$	On going	Visit Loudoun Town

Expected Results: Keeping updated

Possible Resources: Visit Loudoun, Loudoun County Chamber of Commerce, Purcellville Business Assoc.

Objective 5. Provide a tourist info site near train station

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Explore feasibility of using Town Gazebo in Town parking lot for information	\$	Short Term	Town
Action 2.	Reach out to Town Council to get approval	\$	Medium Term	EDAC Visit Loudoun Town Arts Council
Action 3.	Set up information site in gazebo	\$\$		TBD

Expected Results: easier access to tourism information for visitors

Possible Resources: Arts Council, Visit Loudoun

Goal 3. Forge Tourism Partnerships

Objective 1. Develop and enhance communication and partnering with tourism industry stakeholders

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Reach out to tourism organizations: Visit Loudoun, Chamber of Commerce, PBA, VA tourism Bureau, Hallowed Grounds, Winery Association, LC Economic Development AG tourism board.	\$	Short Term	Town, EDAC

Expected Results: The Town will become part of the Tourism network.

Possible Resources: TBD

Objective 2. Work with the newly formed Arts Committee

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Have an EDAC member be a liaison to the arts committee	\$	Short Term	Town, EDAC Arts Council

Expected Results: Arts Festival or Arts type events

Possible Resources: Arts Council

Goal 4. Create sustainable policies and infrastructure that promote tourism

Objective 1. Provide for public art in public places

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Decorate fire hydrants	\$	Short Term	Town, EDAC
Action 2.	Encourage use of Fireman’s Field and the Tabernacle for tourism events	\$	On going	EDAC, Rec Dept Town

Expected Results: Public art allows creative placemaking which creates places people want to visit

Possible Resources: Town high schools, arts community, Arts Council, merchants

Objective 2. Utilize the Town’s facilities for tourism venues

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Utilize all of the Train Station for weekend events (arts shows, etc)	\$	Short Term	Town, EDAC
Action 2.	Flags/banners along Main Street	\$\$\$	Medium Term	EDAC, Rec Dept Town

Expected Results: Providing visitor’s information about the Town.

Possible Resources: Arts Council

Objective 3. Develop a tourism committee of local residents and business people to further tourism in the community

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Start with members of PBA, EDAC, Arts Council, Town Council, local Businesses	\$	Short Term	Town, EDAC
Action 2.	Meet quarterly	\$	On going	EDAC, Town

Expected Results: Dissemination and sharing of information and ideas for enhancing Tourism as well as implementation of elements of the tourism plan

Possible Resources: Local merchants, business owners

Objective 5. Revisit objectives and action items every 12 months

	Description	Cost	Implementation Time Frame	Responsibility
Action 1.	Review of current plan and evaluate goals, objectives and actions	\$	Yearly	Town, EDAC
Action 2.	Revise plan as items are completed and add additional objectives and action items	\$	Yearly	EDAC, Town

Expected Results: Timely review and information on success or failure of the program

Possible Resources: Community Development

Cost Impact Legend	
\$	\$0 to \$1,000
\$\$	\$1,000 to \$5,000
\$\$\$	\$5,000 to \$10,000
\$\$\$\$	\$10,000 to \$20,000
\$\$\$\$\$	over \$20,000

Timing	
Short Term	From Implementation to 2 years
Medium Term	2 to 4 years following implementation
Long Term	4 plus years following implementation
On-going	Starts soon after implementation

Summary & Observations...

If the plan is to have impact, there must be a concerted effort to implement the various actions noted above. There are 17 objectives to be addressed along with 51 Action items. Each item has been given an implementation time frame. It is suggested that short term action items be tackled first. A prioritized list for the short term action items should be created so that implementation may commence as soon as possible.

There has been tourism growth without a centralized implementation group for some time now. Despite this lack of a guiding group, there is a pent up demand for the events that occur in Purcellville. Given that there are thousands of people attending Town events the need for a Tourism Plan is obvious. The Arnett Muldrow market update notes that there is a significant opportunity to capture a portion of the growing and important visitor market.

One of our most important and substantial revenue sources is the meals tax. The restaurant industry is important to our economy and is expected to contribute \$1.4 million in fiscal year 2014 which accounts for approximately 15% of the Town's budget. The continued support of this revenue group is critical. As more tourists visit Purcellville and are encouraged to dine at one of the Town's fine restaurants, the more successful our restaurant industry will become which in turn strengthens the Town's economic base.

Tourism is one of the keys to a successful economic policy. Community members from both the private and public sectors will have to take a leadership role in promoting and implementing this plan in order for it to succeed. If the Town succeeds so do the merchants.

This plan is meant to be used for guidance and should be amended as the need arises.

*"A rising tide lifts all boats."
JFK*

Appendix...

1. Resources
2. Town of Purcellville Market Study Update

Resources...

The various resources listed below are examples of the types of groups and organizations that can help implement the Town's tourism plan. Local resources would be able to supply support for implementing many of the objectives and action items. Regional, state and national resources generally can supply marketing support and process information.

Local – implementation Resources

Purcellville Arts Council
Parks and Recreation Committee
Purcellville Business Association
EDAC
Town of Purcellville
Local breweries and distilleries
Local restaurants
Local antique shops
Local merchants
Town of Hamilton
Town of Round Hill
Franklin Park
Loudoun county wineries
Bed and Breakfast Association of Virginia

Regional- Marketing and Process Resources

Visit Loudoun
Loudoun County Department of Economic Development
George Mason
Town of Leesburg Economic Development and Tourism
Loudoun County Chamber of Commerce
Northern Virginia Tourism Alliance
Virginia Vineyards Association

State and National – Informational Resources

Virginia Tourism Corporation
National Parks
The Journey Through Hallowed Ground
Virginia Wine Board Marketing Office