County of Clarke
Economic Development Advisory Committee

Jim Barb, Bryan Conrad, Christy Dunkle, Christina Kraybill, John Milleson, Eric Myer, Elizabeth Pritchard, David Weiss

Agenda
1:00 pm, Wednesday, September 21, 2016

Meeting Room AB Berryville / Clarke County Government Center
101 Chalmers Court, 2nd Floor, Berryville, Virginia

1. Call to Order

2. Adoption of Agenda

3. Approval/Adoption of Meeting Minutes:

   - November 18, 2015 - Carried Forward from January 20, 2016 Meeting
     Proposed Motion: I move that the minutes of November 18, 2015, be adopted as [presented] or [as amended citing specific amendment].

   - April 20, 2016 – Amended
     Proposed Motion: I move that minutes of April 20, 2016, as amended, be adopted as [presented] or [as further amended citing specific amendment].

   - May 18, 2016 – Amended
     Proposed Motion: I move that the minutes of May 18, 2016, as amended, be adopted as [presented] or [as further amended citing specific amendment].

   - June 15, 2016
     Proposed Motion: I move to approve the minutes of June 15, 2016 as [presented] or [as amended citing specific amendment].

4. Economic Development and Tourism Update by Len Capelli

5. Old Business:

   - Handsome Brook Farms Update by Christy Dunkle

6. New Business:

   - New Businesses in Downtown Berryville Update

   - Berryville Main Street Final Report on Downtown Development Planning Service

7. Next Meeting: Wednesday, October 19, 2016, 1:00 pm

8. Adjourn

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Berryville, VA 22611
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Clarke County Economic Development Advisory Committee

Meeting Agenda

November 18, 2015

1:00 PM

A meeting of the Economic Development Advisory Committee (EDAC) was held at the Berryville/Clarke County Government Center, Berryville, Virginia, on Wednesday, November 18, 2015 at 1:00PM.

ATTENDANCE:

Members present: John Milleson (Chair), Jim Barb, Bryan Conrad, Eric Meyer, Betsy Pritchard, John Staelin, Christy Dunkle
Members absent: Christina Kraybill
Staff Present: Amanda Kowalski
Staff Absent: Len Capelli

1. **Call to Order**
   Mr. Milleson called the meeting to order at 1:02 pm.
2. **Approval of Agenda**
   Ms. Dunkle moved, seconded by Mr. Barb, to approve the agenda as presented.
   The motion carried as follows:

Mr. Barb	-	aye
Mr. Conrad	-	aye
Ms. Kraybill	-	absent
Mr. Meyer	-	aye
Mr. Milleson	-	aye
Ms. Pritchard	-	aye
Mr. Staelin	-	aye
Ms. Dunkle	-	aye

3. **Approval of October EDAC Meeting Minutes**
   Mr. Staelin moved, seconded by Mr. Conrad, to approve the meeting minutes as presented.
   The motion carried as follows:

Mr. Barb	-	aye
Mr. Conrad	-	aye
Ms. Kraybill	-	absent
Mr. Meyer	-	aye
Mr. Milleson	-	aye

Ms. Pritchard - aye
Mr. Staelin - aye
Ms. Dunkle - aye

4. **Economic Development and Tourism Update – Amanda Kowalski**
Ms. Kowalski updated the committee on the website updates, noting that the process has been moving along quickly and smoothly. Ms. Kowalski also updated the committee on the new Twitter account that the Tourism and Economic Development department now has, as well as Facebook updates.
After discussion, it was decided that the board with visit Cochran's Lumber and Millwork, Trelleborg, and Moose Apple Christmas Tree Farm next month. Ms. Kowalski will contact those businesses and report back to Mr. Milleson.

5. **Old Business**
   a. **Signage update – Dr. Myer**
   Dr. Myer reported that the four mile stretch from West Virginia to Berryville had 39 VDOT related signs, and that opposite direction from Berryville to West Virginia had 53 VDOT related signs. Dr. Meyer believes that some of these signs, while necessary, are excessive and disturb the natural landscape of the county.
   After committee discussion, Dr. Meyer will forward all information to Mr. Staelin to present to the Board of Supervisors.
   The board also discussed the possibility of a "Welcome to Clarke County" signs on 340 and route 7.
   b. **Downtown Investment Grant – Ms. Kraybill**
   Ms. Kraybill is absent**.**
6. **New Business**
Ms. Dunkle gave a brief presentation on SET, Stronger Economies Together, an initiative launched by USDA Rural Development. She briefed the committee on the benefits to our community and the timeline within our region.
Mr. Stealin recommended that the Economic Development Department contact Housing Virginia for market trends and updates in the region. Ms. Kowalski will speak with Brandon Stidham about previous conversations with Housing Virginia.
7. **Next Meeting – December 16, 2015.**
Mr. Milleson suggested the committee meeting at 11 am to visit the above mentioned businesses and then convene for lunch.
8. **Adjourn**
Ms. Pritchard moved, seconded by Ms. Dunkle, to adjourn the meeting at 1:36 pm.
The motion carried as follows:
Mr. Barb - aye
Mr. Conrad - aye
Ms. Kraybill - absent

Mr. Meyer	-	aye
Mr. Milleson	-	aye
Ms. Pritchard	-	aye
Mr. Staelin	-	aye
Ms. Dunkle	-	aye

John Milleson, Chair

Amanda Kowalski, Recording Secretary

Clarke County Economic Development Advisory Committee
April 20, 2016 Minutes

A meeting of the Economic Development Advisory Committee (EDAC) was held at the Berryville/Clarke County Government Center, Berryville, Virginia, on Wednesday, April 20, 2016, at 1:00 PM.

Attendance:

Members Present: John Milleson (Chair), Jim Barb, Christy Dunkle, Christina Kraybill, Eric Myer, Betsy Pritchard, David Weiss

Members Absent: None

Staff Present: Len Capelli

1. Call to Order

Mr. Milleson called the meeting to order at 1:03 pm.

2. Adoption of Agenda

Jim Barb, seconded by Christina Kraybill, moved to adopt the agenda. The motion carried by the following vote:

Jim Barb	-	Aye
Christy Dunkle	-	Aye
Christina Kraybill	-	Aye
John Milleson	-	Aye
Eric Myer	-	Aye
Elizabeth Pritchard	-	Aye
David Weiss	-	Aye

3. Approval of January EDAC Meeting Minutes

Members noted the following:

- February 17, 2016 meeting – no quorum.
- March 16, 2016 - cancelled.

Jim Barb, seconded by Dr. Meyer, moved to adopt the January 20, 2016 minutes. The motion carried by the following vote:

Jim Barb	-	Aye
Christy Dunkle	-	Aye
Christina Kraybill	-	Aye

John Milleson	-	Aye
Eric Myer	-	Aye
Elizabeth Pritchard	-	Aye
David Weiss	-	Aye

4. Economic Development and Tourism Update by Len Capelli

Mr. Capelli reported that the Economic Development website and the Tourism Web sites are basically complete and are up and live on the new servers. Response time is very fast and we are not limited to the 10 MB picture limit.

Mr. Capelli reported that an Artist and Artisan Tour in Clarke County that has been planned for October 1-2. Is progressing. Grant opportunities are being pursued and expect to submit a draft to the Virginia Tourism by the end of May.

5. New Business

Ms. Dunkle noted that a new cidery processing only and a new coffee roaster will be opening soon. The Roaster expects to provide wholesale coffee soon, but retail will probably be several months.

6. Next Meeting

Mr. Milleson noted that the next meeting will be held on Wednesday, May 18, at 1:00 pm.

7. Adjournment

Mr. Milleson adjourned the meeting at 1:59 pm.

Attest

John Milleson, Chair

Minutes recorded and transcribed by: Len Capelli, Economic Development and Tourism/Recorder
Review, modifications and format by: Lora B. Walburn, Deputy Clerk to the Board of Supervisors

Clarke County Economic Development Advisory Committee
May 18, 2016 Minutes

A meeting of the Economic Development Advisory Committee (EDAC) was held at the Berryville/Clarke County Government Center, Berryville, Virginia, on Wednesday, May 18, 2016, at 1:00 PM.

Board: John Milleson, Jim Barb, Christy Dunkle, Christina Kraybill, Dr. Meyer, David Weiss

Absent: Elizabeth Pritchard

Staff: Len Capelli also present Jay Arnold observer for the Town

1. Call to Order

John Milleson called the meeting to order at 1:05 pm.

2. Approval of Minutes

Christina Kraybill, seconded by Jim Barb, moved to adopt the minutes of the last meeting, April 20, 2016. The motion carried by the following vote:

Jim Barb	-	Aye
Christy Dunkle	-	Aye
Christina Kraybill	-	Aye
John Milleson	-	Aye
Eric Myer	-	Aye
Elizabeth Pritchard	-	Absent
David Weiss	-	Aye

3. Economic Development and Tourism Update by Len Capelli

Mr. Capelli reported that the Economic Development website and the Tourism Web sites continue to be enhanced and changes made as suggested by reviewers when appropriate and reasonable.

Mr. Capelli reported that the Artists Tour is continuing to move ahead. The Grant Application will be submitted in Late May or early June for review.

Mr. Capelli discussed Virginia Tourism Love Sign Program and a variety of locations were discussed.

Cochran Lumber has volunteered the materials and the State will provide up to $1,500 for installation and construction.

David Weiss suggested that Barbara Byrd be contacted regarding the placement of signs.

4. New Business

Christina Kraybill discussed the Berryville Main Street visit from National and Regional Main Street. Observed that Berryville has a strong service community. Also presented a detailed map of Berryville with types of businesses and locations. Discussed reaching out to property owners to try and get more store fronts filled. Displayed a map showing Businesses on or adjacent to Berryville Main Street and discussed the Main Street meetings held in April.

Discussed the possibility of a boutique hotel on vacant land across from the Town and County Building. Mr. Capelli mentioned that he met with the purchasers of the Battle Town Inn, but at this time there were no concrete plans regarding restoration or opening the property as a restaurant and an inn.

Christy Dunkle mentioned that a Cidery is now operating in Berryville but their tasting room is still in Loudoun County. She noted that the new coffee roaster will be opening soon. The Roaster expects to provide wholesale coffee soon, but retail will probably be several months.

5. Next Meeting

Mr. Milleson noted that the next meeting will be held on Wednesday, June 15, 2016, at 1:00 pm.

6. Adjournment

Mr. Milleson adjourned the meeting at 2:00 pm.

Attest: ______________________________

John Milleson, Chair

Minutes recorded and transcribed by: Len Capelli, Economic Development and Tourism/Recorder
Review, modifications and format by: Lora B. Walburn, Deputy Clerk to the Board of Supervisors

Clarke County Economic Development Advisory Committee
June 15, 2016 Minutes

A meeting of the Economic Development Advisory Committee (EDAC) was held at the Berryville/Clarke County Government Center, Berryville, Virginia, on Wednesday, May 18, 2016, at 1:00 PM.

Board: John Milleson, Jim Barb, Christy Dunkle, Christina Kraybill, Dr. Meyer

Absent: Elizabeth Pritchard, David Weiss

Staff: Len Capelli also present Jay Arnold observer for the Town

1. Call to Order

John Milleson called the meeting to order at 1:03 pm.

2. Approval of Minutes

Jim Barb, seconded by Christina Kraybill, moved to adopt the minutes of the last meeting, May 18, 2016. The motion carried by the following vote:

Jim Barb	-	Aye
Christy Dunkle	-	Aye
Christina Kraybill	-	Aye
John Milleson	-	Aye
Eric Myer	-	Aye
Elizabeth Pritchard	-	Absent
David Weiss	-	Absent

3. Economic Development and Tourism Update by Len Capelli

Len Capelli presented the economic development report.

4. New Business

Christina Kraybill discussed the steam show and that it was a great opportunity for shop owners in town.

Jerry Johnson resigned as Chair of the Berryville Main Street

Discussed Music in the Park and the Ghost Tours following the music. The music is free; the Ghost tours are $15.00 for adults.

Discussed the Fall Sidewalk sale and hope to get more store and shop owner participation with sidewalk sales in addition to the sidewalk vendors.

Want to come up with a new Family Event for the Town, discussed a potential Christmas Show and extra Christmas events.

Discussed some way to work with owners perhaps a tax abatement to allow for rent decrease to make it easier to have a business in Berryville. Discussed Main Street Drive In in the fall.

5. Next Meeting

Next meeting is scheduled for on Wednesday, August 17, 2016, at 1:00 pm.

6. Adjournment

At 1:49 pm, **Jim Barb, seconded by Christina Kraybill, moved to adjourn the meeting. The motion carried by the following vote:**

Jim Barb	-	Aye
Christy Dunkle	-	Aye
Christina Kraybill	-	Aye
John Milleson	-	Aye
Eric Myer	-	Aye
Elizabeth Pritchard	-	Absent
David Weiss	-	Absent

Attest:

John Milleson, Chair

Minutes recorded and transcribed by: Len Capelli, Economic Development and Tourism/Recorder
Review, modifications and format by: Lora B. Walburn, Deputy Clerk to the Board of Supervisors

Clarke County Economic Development and Tourism
Monthly Update
September 20, 2016

The Tourism aspect of economic development and tourism has been gearing up for a very active fall. We have been featuring a series of events that will showcase a variety of activities that will bring tourists to Clarke County and Berryville, Boyce and Millwood. Art at the Mill is being featured on VTC.ORG, as is the Clarke County Artists Studio Tour. These two events should bring hundreds of visitors to Clarke County. We will be able to track attendance at both events and for the Studio Tour we will be able to get a fairly close estimate for purchases by visitors. We are also promoting fall activities at the State Arboretum, which brings many people to Clarke County. Included in this are suggested itineraries that start with a visit to the Arboretum and include Art at the Mill, The Studio Tour, happenings in Millwood and suggested places to eat. We are also starting to promote visiting a Christmas Tree Farm as part of a family fun itinerary.

The Top of Virginia Artisan Trail had their inaugural kick off event at the George Washington Hotel in Winchester. A large number of artists and artisans displayed their work, and food artisans and Artisan Trail Supporters provided appetizers and refreshments. This event was very successful in that many people realized for the first time, how much of an affect this organization can have in leveraging success through mass advertising and promotion. Supervisor Daniel spoke for Clarke County.

We have also been active in working with the Valley DMO. We have been developing an overall message to bring visitors, tourists and families to the Valley. We have been working on messaging, cooperation, branding and highlights that will work to include every county, city and town in the valley. We are presenting to the Virginia Tourism Corporation on October 6th in Richmond.

The Clarke County Tourism Facebook page continues to average over 2,500 reaches per week and is approaching 500 likes. Facebook is a powerful advertising and sales tool and we are continuing to use it to take advantage of its great reach with low cost.

We have been posting more articles on the Economic Development Facebook page but it is taking longer to get traction. Both Facebook pages are now linked to our websites and we are starting to see an increase in click through which is the ultimate goal.

We are starting a new outreach initiative for the Economic Development Website, to get more buildings and properties listed and displayed as well as engaging companies to be featured on the website. There has been very slow response to previous requests for participation by local property owners and businesses.

We are continuing to participate with the NSV and attending SET meetings when POW and will be attending the next BCC meeting in Front Royal.

We have been talking in a very preliminary stage with several companies that have expressed an interest in Clarke County, and with the principal of a farm based brewery who is encouraged by the potential changes to zoning ordinances that could prevent a farm based brewery or distillery from being viable. We have also been researching farm based distilleries and how to attract them to the area.

We are working with planning and zoning to develop a check list for priority properties that will streamline working with prospective businesses who may be interested in these properties. This will also reduce rush requests for information or opinions from planning and zoning making it easier to do business in Clarke County.

In several recent Facebook postings we have used the phrase,
" Clarke County, the gateway to the Shenandoah Valley for Metropolitan Washington DC and Northern Virginia"

At some point if you could please share your thoughts on this it would be greatly appreciated.

The Most Innovative Women in Food and Drink

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2 of 20

2. Betsy Babcock, Handsome Brook Farm

This former CEO of a venture-capital firm has become a leader in the sustainability movement--one egg at a time. Approaching semiretirement, she and her husband moved to a farm in upstate New York and bought seven chickens, opening a B&B with breakfasts courtesy of their tiny flock. Seeing untapped potential in those high-quality eggs, she decided to expand in a major way. Today, the Handsome Brook Farm network has 351,000 pasture-raised chickens, producing 58 million eggs a year. Babcock took the unusual step of buying her own mill to ensure her hens have organic, non-GMO feed that can be easily customized for different flocks. And, to spread her ideals, she's partnered with 66 small farms, most certified organic, and expects that number to grow to more than 200 next year. "All follow strict 'pasture-raised' standards, like providing plenty of space for chickens to forage," Babcock says. "Because it requires a lot of land, the scalability of pasture-raised animals is tough, but it's possible. We haven't had to sacrifice the integrity of what we're doing."

SEE MORE

We considered hundreds of entrepreneurs, activists and idealists to single out those who have had the most transformative impact in the past year on what we eat and drink. —*Christine Quinlan, Elyse Inamine, Carson Demmond and Daisy Alioto*

YOU MAY ALSO LIKE

Berryville Main Street

Downtown Development Planning Service 2016

Berryville, Virginia

Prepared by
Todd Barman, Principal Member

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Development Strategies, LLC

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Prepared for

VIRGINIA MAIN Street
VIRGINIA DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT

Introduction

Barman Development Strategies, LLC was retained by the National Main Street Center and Virginia Main Street to provide Berryville Main Street (BMS) with a Downtown Development Planning Service. The goal of the service was to assist BMS with refining their economic development strategies based on their unique economic development assets and opportunities. Elements to the service included documenting those assets, providing insight/expert opinion into downtown Berryville's market and a draft market position statement, brainstorming business concepts for downtown Berryville that would leverage anchors and fit niches, and exploring promotion and marketing opportunities.

Summary of the service:

- Providing integrated economic development scope of work recommendations across the areas of design, organization, promotion, and economic vitality.
- Providing insight/expert opinion into the district's market and a draft market position statement.

Task One: Reconnaissance

Barman Development Strategies, LLC performed a background review of prior planning efforts, promotional materials, histories, etc. While onsite Barman Development Strategies, LLC participated in a walking tour of the downtown.

Task Two: Market Assessment

It is the philosophy of Barman Development Strategies, LLC to base Main Street scope of work on a clear understanding of the market; for BMS to be market driven. For this reason, Barman Development Strategies, LLC provided BMS with a market assessment. Todd Barman has refined a market assessment methodology that empowers community leaders to inventory their economic development assets, identify their existing markets and to understand the opportunities presented by those assets and markets; especially the opportunities which may not currently be met by the downtown district. That methodology dovetails into design applications such as public and private improvements that better communicate brand at the point of sale. It also dovetails into promotional applications such as cooperative marketing and development efforts between independent business and property owners based on downtown's markets.

Steps

1. Barman Development Strategies, LLC reviewed preexisting market information.
2. Barman Development Strategies, LLC developed and processed an asset inventory (see below).
3. Barman Development Strategies, LLC, developed and processed a market position questionnaire (see below).

Draft Market Position statement

Barman Development Strategies, LLC compiled the results of the market review and the market position questionnaire into a concise downtown market position statement. This market position statement describes where downtown is or should be "positioned" in the market based on market information, community desires and realistic expectations. It distinguishes downtown's competitive advantage (commercial brand awareness) versus surrounding commercial opportunities. It also includes a synopsis of the downtown's major market groups and a description of its opportunities for growth.

Downtown Berryville specializes in offering government and professional services but also has an abundance of personal care (including wellness) and automotive services as well as complementary "mom and pop" restaurants and retail. Services are primarily offered to residents within Clarke County (approximately 0 to 8 miles out) and secondarily to residents from 8 to 24 miles out. Downtown Berryville also serves visitors from Loudon County (VA) and the eastern edge of West Virginia (24 to 40 miles out), and the Washington DC Metro area who embrace a healthy, natural lifestyle and are seeking a more relaxed and personal experience (a "retreat"); especially women between the ages of 35 and 55 years old (often accompanied by a partner, friend or family member). This later market has the greatest potential for growth especially for the hand grown and made (or crafted) or locally grown and made products niches, and the home décor/art niche (especially practical).

Task Three: Vision, Community Transformation Strategies and Scope of Work

The Main Street Approach begins with creating a vision for success on Main Street. Main Street promotes a community-driven process that brings diverse stakeholders from all sectors together, inviting them to be proactive participants in the revitalization process. This ensures that the vision is a true reflection of the diversity of the community. Whatever the vision, the goal is holistic transformation of Main Street, accompanied by rigorous outcome measurement to demonstrate results.

A vision of success alone is not enough. Communities must work together to identify key strategies, known as Community Transformation Strategies that will provide a clear sense of priorities and direction for the revitalization efforts. Typically communities will address two to three Community Transformation Strategies that are needed to help reach a community vision. These strategies will focus on both long and short-term actions that will move a community closer to achieving its goals. Barman Development Strategies, LLC proposes the following Community Transformation Strategies for Berryville Main Street:

- **Strengthen downtown Berryville's convenience-driven economy**; especially in the areas of government and professional services, personal care (including wellness) and automotive services as well as complementary restaurants and retail.
- **Strengthen downtown Berryville's visitor-driven economy**; especially in the areas of handmade/handgrown (or locally grown and made) products niche (including agri-tourism), and the home décor niche (including handmade home décor).
- **Strengthen downtown Berryville's elder-driven economy** (youthful retirees/empty nesters)

As outlined in the Economic Development Philosophy (attached), all of Main Street's Four Points play an economic development role, and for successful asset-based economic development, each role must be embraced.

Task Four: Dream Marketplace

The service was designed to provide BMS with more specific direction on how to transform knowledge of the market into proactive design of a marketplace. It takes a concrete and compelling vision of a fully functioning future marketplace to attract the entrepreneurs and investors who will eventually realize that vision. Commercial districts that outcompete downtown attract businesses by using a sound market position and a solid business mix (niched and clustered) to sell potential businesses on their ability to become part of a successful place. Barman Development Strategies, LLC strove to build BMS's capacity to understand how their downtown marketplace functions and can function.

Desired outcomes for the service:

- Increased Economic Development clout for BMS
- A seat at the Economic Development table
- In some ways the making of the table
- Increased organizational confidence
- Increased investor confidence
- Additional outcomes - *Inventoried in part through a pre-service conference call and in part through onsite discussions*:
    - Improvement to the built environment, and strategies for commercial development
        - Design for the retail sector
        - Managing flow through the district
        - Civic improvements, commercial development, marketing, etc.
        - How to engage stakeholders ("What is in it for me?")
        - Alternative sources of funding (e.g. grant opportunities for cultural tourism projects, and landscape design improvements)
        - Desirable use of land/commercial space
    - Addressing issues such as:
        - The "treescape," greenspace
        - High rents (tiered real estate tax?)
        - Volunteerism
        - Wayfinding
        - Hours of operation
        - Parking (easing restrictions to help residential)

Asset Based Economic Development

Economic Development Assets The Main Street Four-Point Approach® is an asset-based economic development strategy (see Economic Development Philosophy attachment). The assets common to historic commercial districts are heritage assets and human assets. Heritage assets encompass both built and cultural history. Human assets encompass both entrepreneurs (local/independent owner operators) and an engaged public (locals with emotional and financial buy-in). Attention to assets has the potential to boost investor confidence. Confidence, the ability to see a vision of oneself making money as part of a successful place, is necessary for investment to occur. Berryville and downtown Berryville have a significant number of assets upon which to be proud and to build a successful development strategy. Inventorying those assets are an important part of the market research process. The list of assets below was generated by Barman Development Strategies, LLC through a little research (*Inventoried in part through a pre-service conference call, a pre-service questionnaire that included an asset inventory and through onsite observations).* BMS should refine this list.

Heritage Assets

BUILT HISTORY ASSETS (bricks and mortar) – *Inventoried in part through a pre-service questionnaire that included an asset inventory and in part through onsite observations.*

- Berryville built history on the National Register of Historic Places (places in or immediately adjacent to BMS's district are highlighted in **bold**):
    - **Berryville Historic District**; Jct. of US 7 & 340, Main, Church, & Buckmarsh Sts.
    - Chapel Hill; 300 Chapel Hill Ln.
    - Clermont; 801 E. Main St.
    - Cool Spring Battlefield; Jct of Shenandoah R. and VA 643
    - Fairfield; E of jct. of Rtes. 340 and 610
    - Glendale Farm; Jct. of VA 761 and VA 632, N side
    - Josephine City Historic District; Josephine St.
    - Josephine City School; 301-A Josephine St.
    - Long Marsh Run Rural Historic District; Roughly bounded by WV state line, Virginia 608, Virginia 612, Virginia 7, and VA 653
    - Norwood; VA 7, S side, 7/8 mi. E of jct. with VA BR 7
    - **Old Clarke County Courthouse**; 104 N. Church St.
    - Smithfield Farm; 568 Smithfield Ln.
    - Soldier's Rest; .3 mi N of Fairfax Ave., approximately .5 mi. E of jct. of US 340 and VA 7
    - Wickliffe Church; VA 608, E side, .5 mi. S of VA-WV line
- Historic Main Street buildings- 3 blocks
- Coiner's building- vacant
- Old Hotel- now housing 8 businesses + new coffee shop soon to open
- Hudson Building- now housing 3 businesses

- Old Newspaper building- now housing 3 businesses
- Old Pharmacies- one is now crafter's co-op, other will soon house Middleburg Bank
- Battletown Inn- closed but under sales contract
- Barns of Rose Hill, 2 former dairy barns, sits in town park
- Original Fire House now houses art gallery
- Old Mill at Railroad Tracks now houses Hip and Humble
- Berryville Farm Supply is an institution
- Historic Church Street buildings- 2 blocks
- Courthouse Complex
- Post Office- depression era mural inside
- Grace Episcopal Church (built 1857) with cemetery
- Crow Street- one block, not historical but important part of the business district
- Josephine Street- outside business district but a historic street of the most independent African-American community following the Civil War.
- Old Apple Industry buildings on First Street

CULTURAL HISTORY ASSETS (noteworthy local stories, traditions, ethnicity) – *Inventoried in part through a pre-service questionnaire that included an asset inventory and in part through onsite observations.*

- Story of events. Local events are often vehicles for celebrating and communicating noteworthy local stories, traditions, ethnicity, etc. However, long standing events can also become part of the community's story and traditions themselves. The following are events that have potentially become cultural history assets:
    - Bi-annual Berryville Yard Sales, which bring hundreds of people downtown and increases the lunch crowd by about 35%.
    - Music in the Park, free
    - Historic Ghost Tours event – Over 100 people came and had a blast learning of the ghost history in town.
    - Clarke County Farmer's Market
    - To a lesser extent - Progressive Dinner, Light Up the Town, Parking Meter Contest, Shop and Hop Easter promotion, and Sidewalk Art Promotion
    - Clarke County Fair- old fashioned country August fair
    - Blue Ridge Hunt
    - Watermelon Park Music Festival (Fall Solstice) and River and Roots Festival (Summer Solstice)?
- Namesake Benjamin Berry developed a 20 acre town site in the 1790s and earlier called Battletown, a reference to the rowdy lifestyles in the pre-Revolution hamlet.
- Home of Harry F. Byrd, Sr., who served as governor of Virginia 1926-1930 and U.S. Senator 1933-1965.
- The story of Josephine City (1870), a self-sufficient African American community, at the time on the outskirts of Berryville, now located in town limits.
- The story of farming, horse, and hunt culture- lots of horses and protected farmland surround the town

- The story of many Tidewater plantation families moving to Clarke County in the early days. The county was a part of Frederick County in those days.
- The story of the Bank of Clarke County, founded in 1881
- The story of Holy Cross Abby (located in the county)
- Greenhill Cemetery
- Events at The Barns of Rose Hill; a state of the art performing arts venue
- Auction Houses- one of each end of town
- Cultural history and tourism partners
    - Clarke County Historical Association

Human Assets

ENTREPRENEUR ASSETS – *Inventoried in part through a pre-service questionnaire that included an asset inventory and in part through onsite observations.*

- Entrepreneurs by definition are never satisfied and forever working on their business (tinkerers). Downtown Berryville can certainly boast entrepreneurs, but it will be up to BMS to develop that list. Of note:
    - Entrepreneurs in last 5 years with new ways of doing business- Elizabeth Mock (Modern Mercantile), Peter Miller (Framemaker), Heidi Grubbs-McClemens (The Berryville Grille), Wayside Farm (to east of town), Christina Kraybill (My Neighbor and Me), Turi Nevin-Turkel (Turiya Yoga Wellness- in BMS incubator now), and Julie Ashby (Hip and Humble)
- Groups catering to the entrepreneurial set
    - Lord Fairfax SBDC- entrepreneur resources
    - People Inc.- entrepreneur resources

ENGAGED PUBLIC ASSETS – *Inventoried in part through a pre-service conference call and questionnaire that included an asset inventory and in part through onsite observations.*

- Key economic development partners (Groups catering to the entrepreneurial set listed above) plus:
    - Len Capelli- Economic Development Director for Town/County
    - Clarke County Economic Development Advisory Committee
    - Christy Dunkle- town planner
    - Town Council
- Many of the building owners
- Civic partners (public engaged through civic partners)
    - Friends of Barns of Rose Hill
- Active and engaged BMS volunteers. The reenergized economic vitality committee volunteers are a case in point (Mary Jo Pellerito, Christina Kraybill, and Patty Maples).

OTHER NOTEWORTHY ASSETS – *Inventoried in part through a pre-service conference call and questionnaire that included an asset inventory and in part through onsite observations.*

- Appalachian Trail Community

- Blandy Experimental Farm and State Arboretum of Virginia
- Holy Cross Abby brings in visitors for silent retreats by the river
- Weddings at the Historic Rosemont Manor
- Outdoor Recreation in the Blue Ridge Mountains
- Shenandoah River Recreation
- Local farms, nurseries, wineries
    - Wayside Farm- just outside to the east of town has become a popular attraction
    - Chilly Hollow Farm
    - Mackintosh Fruit Farm
    - Audley Farm
    - Anderson Nursery & Garden Center
    - Veramar Vineyard (Berryville)
    - 612 Vineyard
    - Clermont Farm

Interpretation and expert opinion

(by Todd Barman, Barman Development Strategies, LLC)

Barman Development Strategies, LLC's **favorite built history assets to leverage**:

- Historic Church Street buildings/Courthouse Complex
- Barns of Rose Hill
- *Note: Berryville Main Street's favorite built history assets to leverage also include:*
    - *Historic Main Street buildings*
    - *Old Apple Industry buildings on First Street*

Barman Development Strategies, LLC's **favorite cultural history assets to leverage**:

- The story of Josephine City (1870), a self-sufficient African American community, at the time on the outskirts of Berryville, now located in town limits.
- The story of farming, horse, and hunt culture- lots of horses and protected farmland surround the town
    - Blue Ridge Hunt
    - Clarke County Fair
    - Local farms, nurseries, wineries
    - Clarke County Farmer's Market

Barman Development Strategies, LLC's **favorite entrepreneur assets to leverage**:

- Entrepreneur role models, potential mentors: Elizabeth Mock (Modern Mercantile), Peter Miller (Framemaker), Heidi Grubbs-McClemens (The Berryville Grille), Wayside Farm (to east of town), Christina Kraybill (My Neighbor and Me), Turi Nevin-Turkel (Turiya Yoga Wellness- in BMS incubator now), and Julie Ashby (Hip and Humble)

Barman Development Strategies, LLC's **favorite engaged public assets to leverage**:

- Active and engaged BMS volunteers; especially the reenergized economic vitality committee volunteers *[Thank you Mary Jo Pellerito, Christina Kraybill, and Patty Maples for your thorough completion of all the homework]*
- Friends of Barns of Rose Hill

Barman Development Strategies, LLC's **favorite "other" assets to leverage**:

- Appalachian Trail Community
- Blandy Experimental Farm and State Arboretum of Virginia
- Holy Cross Abby brings in visitors for silent retreats by the river

Downtown Berryville Market Position

Based on local market expertise shared through a pre-service homework assignment and through an onsite workshop (with some editing and additions by Todd Barman, Barman Development Strategies, LLC). BMS is encouraged to regularly revisit these questions since the market is always changing.

1) What is downtown Berryville's potential trade area? What market could the district go after if its' position was strong? *[Zip codes, distances from downtown in miles or minutes, or some other descriptive geography]*

   - From BMS's market position homework:
     - These communities are within 25-30 miles and represent all points into Berryville. Communities in neighboring West Virginia and Maryland are not listed, although some of these could be within the potential trade area.

Community	County	Zip Code	Population	Distance and Direction from Berryville	Travel Routes to Berryville
Winchester	Frederick	22601	27,216	13.2 miles E	VA-7 E State 661 and VA-7 E State 632
Stephenson	Frederick	22656	2,144	13.7 miles N	VA-7 E State 761 and State 632 I-81 S and VA-7 E
Boyce	Clarke	22620	602	6.3 miles S	US 340 N
Millwood	Clarke	22646	214	6.5 miles S	US 340 N
White Post	Clarke	22663	1,521	9.9 miles S	US 340 N
Front Royal	Warren	22630	14,899	22.2 miles S	US 340 N State 624 State 638
Stephens City	Frederick	22655	1,899	18.3 miles SW	I-81 N and VA-7 E I-81 N and US 340 N
Strasburg	Shenandoah	22657	6,511	30 miles SW	Same as Stephens City
Middletown	Frederick	22645	1314	23.4 miles SW	VA-7 E and I-81 N US 340 N

Round Hill	Loudoun	20141	599	12.5 miles E	VA-7 W
Bluemont	Loudoun	20135	2,834	9.4 miles E	VA-7 W
Middleburg	Loudoun	20117	751	25.6 miles E	US 50 W State 734 and VA-7 W
Purcellville	Loudoun	20132, 20134, 20160	8606	15.5 miles E	VA-7 W
Upperville	Farquier	20184	807	17.4 miles E	US 50 W

- Berryville can serve the daily needs of people located in small communities that are within 10-15 miles. People that visit Berryville periodically for retail, arts/entertainment, and dining could travel from communities that are located within 25-30 miles in any direction. Depending on the purpose for their visit, people could be attracted from further distances, making Berryville part of an extended stay or part of a day trip itinerary.

- From feedback following review of draft report:
  - Clarke County
  - Within 30 minutes
  - 30-60 miles
  - Loudon County (VA), the eastern edge of West Virginia, and the Washington DC Metro area

2) Name downtown Berryville's competition within and just outside that trade area. *[Focus on apples to apples competition. You may also list alternative commercial districts (districts that aren't apples to apples competition, but capture target consumer spending); note accordingly]*

- From BMS's market position homework:
  - Berryville is close to small communities in all directions that include the towns of Boyce, Millwood and White Post, Rippon (WV), and wide areas of farmland and open space. The closest community that has a commercial district is **Millwood**, which is not characteristically the same as Berryville but does have similar key attractions that could be considered competition to some degree. A typical visit to the center of Millwood would include Locke's General Store, Burwood Mill and other historical properties, Red Schoolhouse Antiques, and Duvall Designs Gallery.
  - Purcellville is too large to be considered apples to apples competition. There is a cluster of small communities that surround Purcellville that include Round Hill, Harmony, and Lovettsville. These communities help support Purcellville's commercial growth, which could be considered a similar configuration to the small communities that surround Berryville.
  - **Middleburg**'s mix of businesses and the relative size of its commercial district may be the most similar to Berryville. It extends about 3 city blocks, and features restaurants, small eateries, high-end antique stores, several boutiques and gift shops, Wylie Wagg – a high end retail pet supply store

(franchise), Salamander Resort and Spa, Journeyman Saddlers (leathers and equestrian), and a large grocer (Food Lion). Middleburg is accessed via Route 50 and is surrounded by farms, wineries, and open space. Travelers to Middleburg may also pass through Aldie, another similar town but closer to the larger population centers – including Chantilly, Dulles and Centreville.
    - **Winchester** is a much larger city but a significant competitor to most of our retail/service businesses since it is so easy to drive there rather than investigate what is available here in Berryville.
- From visit/workshop/research:
    - Major Retail Centers & Locations (Alternate shopping, not necessarily head to head competition)
        - Clearbrook Shopping Center
        - Winchester Gateway
        - Ward Plaza Shopping Center
        - Round Hill Shopping Center

Questions about the current business mix of downtown Berryville as compared to the competition listed above:

3) What is strong about downtown Berryville's business mix? *[Individually strong businesses (anchor businesses that attract the most customers and/or have the most positive impact on downtown's image)]*

- From BMS's market position homework:
    - Bank of Clarke County
    - Sponseller's Flowers
    - The Berryville Grille
    - Berryville Auto Parts
    - Modern Mercantile
    - My Neighbor & Me
    - The Tea Cart
    - PH Miller Studio- framemaker
    - The Cookie Guy
    - Mario's Pizza
    - Camino Real Mexican Restaurant
    - Jane's Lunch- strong local customer support
    - Hip and Humble- only open on weekends
    - Dollar General & Family Dollar- many customers

4) Are there primary sets of goods and services offered or niches where downtown dominates? *[Collectively strong groups of businesses. Note: there will always be secondary and supporting goods and services]*

- From BMS's market position homework:
    - Berryville Historic District has a very strong service sector. These businesses have good reputations and they are cost competitive with larger cities. A visitor to Berryville would also be interested in the historical buildings that house some of these businesses and firms.
        - Medical/Dental/Eye/Skin/Chiro/Midwife/Phy. Therapy/Massage Therapy/Yoga Wellness services & Walk-in Clinic- at least 14 locations
        - Auto- at least 9 locations- Berryville Auto Parts, Berryville Service Center, Big Daddy's, Coul's Automotive, Dewey's, Body Works auto shop, Kenny's Auto & Cycle shop, Clarke County Speed Shop, Main Street Auto Repair
        - Hair- at least 8 locations- Natural Mane, Split Ends, The Strand Hair Salon, Potter's, Paul Jones Barber Shop, Main Street Barber Shop, Annabelle's, Shelley's
        - Lawyers- at least 4 offices
        - Realtors- 3 locations- ReMax, Century 21, Jim Barb Realty
        - Banks- 3 locations plus drive thru- Bank of Clarke County, BB&T, and coming soon- Middleburg Bank
        - Dance- 3 locations- Social Graces Dance Studio, Stardust Ballroom Dance, Blue Ridge Dance Studio
        - Gas Stations- 2 locations
        - Pharmacies- 2 locations- Reed's Pharmacy, Battletown Pharmacy
        - Insurance- 2 locations- Blue Ridge Insurance, Mohler Insurance
        - Architects- 2 locations- Main Street Architects, Carter & Burton Architects
        - Auctions- 2 locations- Hash, Headley's
        - Nursing Homes- 2 locations
        - Sponsellers Flower Shop
        - Broy's Car Wash
        - Cabinet & Appliance Shop
        - Broy & Son Pump Service
        - Festival Dry Cleaners
        - Blossman Propane
        - Thomas Heating & Plumbing
        - PH Miller Studio- Framemaker
        - Tricks of the Trade Leather Shop
        - Mike's Music Studio
        - Body Art Tattoo
        - Susan Huntingdon Photographer
        - Norton Screen Printing

        - Smallwood Woodworking
        - Local Wood
        - Anytime Fitness
        - Lloyd's Transfer & Storage
        - Family Trust Numismatics
        - Dunn's Land Survey
        - Accountant- at least one
        - Laundromat
        - Many more offices located on Second floors
    - For the small size of Berryville, we have a decent number of restaurants. Most are very popular and have a steady stream of customers.
        - The Berryville Grille (open Tues-Sun – 9 am-9 pm) – New/Traditional American, wine/beer - $11-$30
        - Jane's Lunch- open 7 days for breakfast/lunch
        - El Camino Real (Su-Th – 11 am-9:30 pm; Fri/Sat 11 am – 1 am) – Mexican, full bar - $11-$30
        - Mario's Pizza and Pasta (Daily – 11 am – 10 pm) – Italian Pastas, Pizza, Salads, Subs - Under $10
        - Boyd's Nest (Mon-Sat 7 am – 3 pm) – breakfast, lunch and catering – Under $10 - $15
        - Santorini Grill- open 7 days
        - Fox's Pizza- open 7 days
        - Golden Dragon Chinese Restaurant- open 7 days
        - The Cookie Guy (Daily – 9 am – 5 pm) – coffee/tea, cookies, smoothies, treats - $
        - The Tea Cart (Weds-Sat – 11 am – 4 pm) - $$
        - Subway- open 7 days
        - Neighborhood Italian Kitchen- soon to open
        - Coffee Shop- soon to open by a roaster
- From VMS facilitated Berryville Main Street Board Retreat ["What is the Berryville Main Street district's primary set of goods?"]
    - Furniture and Home Goods
    - Hair Salons
    - Gifts
    - Restaurants
    - Clothing
    - Women's Boutiques
    - Cultural Arts
    - Both high-end and affordable goods and services
- From feedback following review of draft report:
    - Services and attractions for the agricultural community; anchored by Clarke County Fairgrounds and Berryville Farm Supply *[Comment: May be a primary set of goods and services offered or niche where Berryville dominates; not downtown specifically.]*

- More traditional country gatherings (like the Clarke County Fair) alongside a re-emergence of farm-to-market enterprises (like the Clarke County Farmer's Market) *[Comment: May be a primary set of goods and services offered or niche where Berryville dominates; not downtown specifically.]*
- Practical items for the home, home décor, coffee/tea, edibles, clothing, accessories and body care products.
- Thrifted and recycled raw materials for DIY and artistic projects (The Town's Annual Yard Sales).

Questions about the current customer base for downtown Berryville as compared to the competition listed above:

5) What is strong about downtown Berryville's current and potential customer base? *[Positive characteristics about the customers/consumer segments available within the trade area (the more specific the segments and characteristics the better)]*

- From BMS's market position homework:
  - Current customer base:
    - Berryville obviously has strong customer support for our service and restaurant businesses based on the number of businesses present long term. These customers value local convenience, consistent quality service, and good value.
    - In the past 20 years, Independent retail shops though have struggled to gain significant local, regional, and tourist customers. Large events, like Berryville Yard Sales, hosted by the Berryville Merchants and Berryville Main Street have helped to draw new customers into these shops. Some of the newer retail businesses though are reporting strong local support, becoming a destination regionally, and seeing more tourists entering through their doors.
    - Conscientious local customers research Berryville's retail offerings before automatically driving to another town to shop. Word of mouth referrals and internet marketing have drawn regional customers looking for unique shop offerings. Tourists using TripAdvisor have come to Berryville for one reason but have often found several more reasons to stay and explore.
    - Many current and potential customers want to be entertained in our retail shops. They want to window shop or be a part of a special event that interests them. The challenge for the retailer is to turn a guest into a customer. Due to the strong service environment of Berryville, many customers are disappointed that some retail shops keep similar hours to the service sector, closing at 5pm during the week, closing at 12pm on Saturday, and closed Sundays. Frustration is often voiced that so many of our store-fronts are service-oriented and therefore give the appearance of a "dead" town during evenings and weekends.

- Potential customer base:
  - There is potential to highlight our strong service business sector and find ways to invite these customers to become restaurant and retail customers too.
  - People may travel to or pass through Berryville, Route 7 & Route 340, for different purposes but all may not necessarily be stopping to visit the Main Street commercial district.
  - Events within the Town of Berryville
    - Events held at the Clarke County Fairgrounds
    - Weddings at the Historic Rosemont Manor
    - Events at The Barns of Rose Hill
    - Music in the Park
    - Berryville Yard Sales
    - Dances at the Social Graces Ballroom & Stardust Dance Studio
    - Local School Events
    - Local Church Events
    - Clarke County Parks and Recreation- Chet Hobert Park
    - Clarke County Farmer's Market- May through end of October every Saturday morning
    - Cruize-In- new August event
  - Events within Clarke County
    - Blandy Experimental Farm and State Arboretum of Virginia
    - Blue Ridge Hunt
    - Watermelon Park Music Festival (Fall Solstice)
    - River and Roots Festival (Summer Solstice)
    - Appalachian Trail Community
    - Small Town USA Road Trips (automobile, motorcycle enthusiasts)
    - Cyclists (Century 100 event was moved to Shepherdstown)
    - Outdoor Recreation in the Blue Ridge Mountains
    - Shenandoah River Recreation
    - Clarke County Studio Tour- new event this fall

- From feedback following review of draft report:
  - Broad/general potential market breakdown
    - People that work in or near Berryville
    - People that live in or near Berryville but work in areas outside of these communities
    - Visitors coming from areas located between 30-60 miles
  - Broad/general income breakdown
    - People working in food or other service industries ($35-45K)
    - Other professionals ($55-80K)
    - Those people living in the area but working in the larger metropolitan areas ($65-100K+)

6) Are there primary consumer segments served or niches where downtown dominates? *[Note: there will always be secondary and supporting consumer segments]*

- From VMS facilitated Berryville Main Street Board Retreat ["Who is the Berryville Main Street district's primary customer?"]
  - Tourists
    - NOVA and DC/Baltimore
    - Wineries
  - Women
    - 40+
    - Income $80K+
  - Grandparents
  - Locals (Surrounding Counties)
  - Segment Niche – Interior Designers
- From feedback following review of draft report:
  - Women between the ages of 35 and 55 years old (often accompanied by a partner, friend or family member)
  - Those who embrace a healthy, natural lifestyle and are seeking a more relaxed and personal experience

7) As a whole, what is downtown's competitive advantage when it comes to selling those sets of goods and services and/or attracting those consumer segments listed above? Answer this question by listing positive characteristics commonly shared by businesses selling those sets of goods and services (Why are they strong sellers?) and/or attracting those consumer segments (why are they attractive?).

- From BMS's market position homework:
  - Many first-timers to Berryville remark that we are just like "Mayberry," an authentic small town. The Town of Berryville hosts many large events at the Clarke County Fairgrounds, and moderate-sized evening events at The Barns of Rose Hill. While the Fairgrounds has no parallel elsewhere, The Barns draws entertainers with strong local and regional followings. The Town is easy to navigate, although some businesses are tucked away and not visible to the average tourist. Overall, it has a relaxed atmosphere, which is appealing to certain age segments, and people that like to avoid crowds, noise and congestion. Berryville Main Street's historical architecture is well-maintained, which appeals to people that appreciate small Southern towns.
  - Qualities of the most successful businesses in Main Street Berryville are listed below.
    - Service:
      - Physical Space: Strong signage, many are Handicap accessible and clean.
      - Quality of Service: Consistent service and friendly owners/staff.
      - Price / Service / Hours: Good value, convenient location, and consistent hours.

- Climate / Clientele: Strong presence of competency and professionalism

- Food Services:
  - Physical space: Clean, not overly crowded or loud, and are easily able to accommodate the flow of customer traffic.
  - Quality of food: High quality, reasonably sized portions. The dishes vary in creativity – from traditional Ethnic-American fare to farm to table connection and new takes on traditional dishes. All have a reputation for being a good place for one or more meals (breakfast/lunch/dinner with drinks).
  - Price/Service/Hours: From affordable ($), children/seniors, and specialty dishes ($$). Wait staff are friendly, efficiency and attentive. The best dining options are open most days of the week with hours that are suitable for their services. Most of these restaurants are open in the mornings and afternoons, fewer in the evenings, and only one restaurant that has late-hours operation.
  - Climate/Clientele: The atmosphere of all restaurants in Berryville is relaxed. The stylings vary from uncluttered colorful décor (Mario's, Camino Real), "country diner" (Boyd's Nest), New American historical town (Berryville Grille), to modern (Cookie Guy). Clientele ranges from all-ages (particularly Mario's and Camino Real), to people enjoying a social gathering, after-work dinner and a drink, or a unique outing (Tea Cart).
- Retail:
  - Physical space: Clean, Attractive window displays, Interesting merchandising, Inviting
  - Quality / Product Mix: Unique product, Hand-crafted, Quality products
  - Price/Service/Hours: Competitive prices, Consistent Hours, Evening/Weekend Hours, Great Customer Service
  - Climate/Clientele: Fun, Interesting, Friendly Owner/Staff, Engaged Internet Presence
- Arts & Entertainment:
  - Physical space: Beautiful Architecture and Use of Space
  - Quality: Top Notch Music, Film, and Art Shows
  - Price/Service/Hours: $10-$30/show, Evenings & Weekends
  - Climate/Clientele: Relaxing climate, Educated Clientele, and Engaged Internet Presence

Questions about the current business mix, customer base, and competitive advantage of downtown's COMPETITION (and/or alternative commercial districts).

8) Do you want to go back and add to your answer to questions #1 and #2? If yes, please do.

9) Are there primary sets of goods and services offered or niches where they dominate?

- From BMS's market position homework:
  - Millwood attracts weekend tourists and sightseers (Locke's General Store, Burwood Mill, Antiques, Art), although there is little to no competition for dine-in options and other retail.
  - The town of Middleburg offers upscale retail and services, but also has some more affordable options. The Salamander Resort and Spa dominates for lodging, special events, and day travel. While the Historic Rosemont Manor competes with Salamander Resort for lodging and special events, the Salamander Resort has a larger capacity and other services that are not offered in Berryville.
  - Front Royal is a much larger semi-rural area that has a much wider range of retail and services. They would be considered a dominant entity for all economic sectors. There are a number of people that live in Front Royal and either work in Berryville or draws in customers from Berryville's population.
  - Old Town Winchester dominates in bringing tourists into their large pedestrian-only area that has a mix of historical attractions, retail, food, drinks, furnishings, arts/entertainment and other services. This area is surrounded by the same mix of businesses and extends for several city blocks in all directions.
  - Purcellville hosts a stronger Farmer's Market. Several of our local farmers/businesses sell at this market rather than our own Clarke County Farmer's Market.
  - *Note on Internet- Most of Clarke County does not have high speed internet and cell phone reception is not consistent across the county either. Most of these other communities do not face this obstacle.

10) Are there primary consumer segments served or niches where they dominate?

11) As a whole, what is their competitive advantage when it comes to attracting those consumer segments?

- From BMS's market position homework:
  - The competitive advantage for many of these other commercial districts is a stronger mix of retail with the restaurants and services offered. They also as a whole have a stronger internet presence and more well-known events that draw in customers.

Closing question:

12) Are there any local trends that might impact downtown Berryville's market position in the future?

- From BMS's market position homework:
  - There are several trends that could be levers for growth of Berryville's market position.
  - In the food services sector, the growing farm to table trend is not well marketed but is being followed by one or more local restaurants and supported by local organic produce, meat and dairy vendors at the Berryville Farmers Market. A coffee roaster will begin operation by June, and a popular Italian village-style restaurant will be opening soon. The opportunity exists to **link locally produced, hand-crafted consumables with point-of-sale locations in Berryville.** For example, the Holy Cross Abbey is a Trappist Monastery in Berryville that has a bakery with limited hours of operation. In addition, the Berryville Food Lion could be encouraged to work with farms to bring in more locally produced and organic food.
  - Similar to the trend in that connects farm to table, there is a strong interest in preserving culture and also **re-interpretation of traditional arts**. This trend is tagged New American, New grass, or New South. Berryville could leverage this interest to draw people from communities listed in question 1 as well as reaching people from the larger metropolitan areas. Arts and crafts events (like blacksmithing, fiber arts, etc.) and to experience a day in a unique historical town where businesses offer a mix of new with old.
  - A third trend involves bringing in new businesses that offer **furnishings and accessories for the home, décor, unique or collectible household items and gifts**. With Hip and Humble as an anchor establishment, retail shops listed in question 3 and the two auction houses, the Town of Berryville may be well-positioned to expand to other similar businesses to create something like a design center, with a reputation for a location where you can find unique stylings and a product mix that includes vintage and collectible, hand-crafted, artistic, upcycled, American colonial and country traditional antiques, and fair trade / modern ethnic.
  - Other markets that Berryville could support include **people interested in health and wellness, outdoor recreation and activities in a natural setting**. Berryville is a destination for yoga and meditation as a hosted event on some local farms. Berryville is bicycle-friendly in many ways, with wide roads, a bike path, and light to moderate levels of traffic. Unfortunately, the Century 100 event (cycling event) moved from Berryville to Shepherdstown. Reviewing the issues that caused the Century 100 event to move would be useful in understanding where the Town needs improvement to attract people that appreciate these activities.

- Berryville could also be a **wedding destination**, and has many of the supporting businesses and services to attract this market, including the Historic Rosemont Manor (individual lodges available for rent), Waypoint House B&B, The Tea Cart, Berryville Main Street Retail Shops, and Catering. There is currently only one private home in Berryville that is offered as a vacation rental.

Figure 1. Clarke County Regional Report

Source: https://cbb.census.gov/sbe/

Employer Businesses

NAICS Sector	# Businesses	Employment	Annual Payroll ($M)	Receipts ($M)
00: All Sectors	356	2,920	115.7	0.0
11: Agriculture	5	0	0.5	0.0
21: Mining	0	0	0.0	0.0
22: Utilities	1	0	0.0	0.0
23: Construction	65	336	15.7	0.0
31-33: Manufacturing	14	0	0.0	228.3
42: Wholesale	11	86	4.6	0.0
44-45: Retail	33	229	4.7	91.6
48-49: Transportation & Warehousing	7	0	0.0	0.0
51: Information	6	0	0.0	0.0
52: Finance & Insurance	13	0	0.0	0.0
53: Real Estate & Rental & Leasing	16	37	0.7	3.6
54: Prof., Sci., & Tech. Services	43	103	5.7	0.0
55: Mgmt of Companies & Enterprises	0	0	0.0	0.0
56: Admin. & Support & Waste Mgmt. & Remed.	33	140	4.4	6.6
61: Educational Services	6	310	13.1	0.0
62: Health Care & Social Assistance	24	287	8.2	0.0
71: Arts, Entertainment, & Recreation	9	0	1.0	0.0
72: Accommodation & Food Services	22	201	3.1	9.0
81: Other Services	48	355	18.6	11.2

Key Ratios for Employer Businesses

NAICS Sector	Employees per Business	Annual Payroll per Employee ($)	Receipts per Business ($1,000)	Population per Business
00: All Sectors	8	39,633	0	40
11: Agriculture	0	0	0	2,829
21: Mining	0	0	0	0
22: Utilities	0	0	0	14,143
23: Construction	5	46,848	0	218
31-33: Manufacturing	0	0	16,304	1,010
42: Wholesale	8	52,930	0	1,286
44-45: Retail	7	20,603	2,776	429
48-49: Transportation & Warehousing	0	0	0	2,020
51: Information	0	0	0	2,357
52: Finance & Insurance	0	0	0	1,088
53: Real Estate & Rental & Leasing	2	18,162	224	884
54: Prof., Sci., & Tech. Services	2	55,699	0	329
55: Mgmt of Companies & Enterprises	0	0	0	0
56: Admin. & Support & Waste Mgmt. & Remed.	4	31,086	201	429
61: Educational Services	52	42,277	0	2,357
62: Health Care & Social Assistance	12	28,557	0	589
71: Arts, Entertainment, & Recreation	0	0	0	1,571
72: Accommodation & Food Services	9	15,368	408	643
81: Other Services	7	52,270	233	295

Source: 2012 County Business Patterns and 2012 Economic Census

Interpretation and expert opinion

(by Todd Barman, Barman Development Strategies, LLC)

Barman Development Strategies, LLC's **thoughts on potential trade area**

- For the purpose of initial Esri data (See Esri Data Attachment to this report):
    - Primary Trade Area = **0 to 8 mile radius** (or 10 minute drive time)
    - Secondary Trade Area = **8 to 24 mile radius** (or 30 minute drive time)
    - Tertiary Trade Area = **24 to 40 mile radius** (or 50 minute drive time)
- I agree with Clarke County as a primary trade area due to downtown's government service anchor. However, county level data is not an option when analyzing 3 trade areas within Esri, so the 0 to 8 mile radius will be used to approximate Clarke County.
- A 40 mile radius captures Loudon County (VA) and the eastern edge of West Virginia. Pulling data from a 60 mile radius simply to capture secondary data from the Washington DC Metro area would confound analysis.

Barman Development Strategies, LLC's **thoughts on competition/alternative shopping centers**

- Local:
    - Proposed outer ring chain/franchise development (e.g. CVS, AutoZone)
- Regional:
    - Millwood (competition for visitors)
    - Middleburg (competition for visitors)
    - Winchester shopping centers (alternate shopping)
    - Front Royal (alternate shopping)

Barman Development Strategies, LLC's **thoughts on niches where downtown dominates (Best/target products/services):**

- Primary products/services =
    - Government and professional services (Finance, Insurance, Real Estate)
    - Personal care services (including wellness)
        - Medical/Health Services
        - Outdoor recreation and activities in a natural setting
    - Automotive Services
- Secondary products/services = Complementary "mom and pop" restaurants and retail
- Potential for:
    - Hand grown and made (or crafted) or locally grown and made products including agri-tourism products and services
    - Home décor/art (practical, unique, collectible, and "giftable" furnishings and accessories)

Barman Development Strategies, LLC's **thoughts on Anchor Businesses** (From visit/workshop)**:**

- Clarke County Courthouse Complex (Government and professional services niche attracting county residents)
- Post Office (Government and professional services niche attracting local residents)
- Bank of Clarke County (Government and professional services niche attracting local residents)

- Mario's Pizza (Complementary restaurants and retail attracting local residents)
- The Berryville Grille (Complementary restaurants and retail attracting local residents and visitors)
- Sponseller's Flowers (Complementary restaurants and retail and/or furnishings niche attracting local residents and visitors)
- The Tea Cart (Complementary restaurants and retail attracting visitors)
- Berryville Farm Supply (Handmade/handgrown niche attracting residents and visitors)
- *Note: The Medical/Health Services, Automotive Services, and Personal Care Services niches don't have identified anchors*

Barman Development Strategies, LLC's **thoughts on primary customer (Best/target customers):**

- Primary customers = Residents within the primary, secondary, and tertiary trade areas
    - Berryville area agricultural community
- Secondary customers = Visitors from Washington DC Metro area; especially women between the ages of 35 and 55 years old (often accompanied by a partner, friend or family member)
    - Those who embrace a healthy, natural lifestyle and are seeking a more relaxed and personal experience (a "retreat")

Barman Development Strategies, LLC's **thoughts on competitive advantage:**

- Local convenience, consistent quality service, and good value
- Relaxed atmosphere, quiet/peaceful
- Relationships, friendly

Working Market Position Statement

A market position is essentially a specialization or niche for a business, or in downtown Berryville's case a commercial district, relative to the competition. A market position includes two components, a primary consumer segment served and a primary set of goods and services offered (what the business or district is best at selling and to whom). The goal is to differentiate; to be memorable and remarkable so consumers consistently choose your business or commercial district over the competition.

BMS Vision *[Comment: This is a corporate vision]*
"Our vision is to be the premier Main Street organization that is valued for its leadership, partnerships and accomplishments in creating and sustain a vital downtown"

BMS Mission *[Comment: This has elements of a vision, see* **added emphasis***]*
To promote, enhance and support the Berryville Historic District as a **vital center of commercial and cultural life for Berryville and Clarke County**. To provide opportunities for government entities, private organizations, businesses and individuals who will contribute revitalization to the Berryville historic district. We are projecting a ten year plan to see the Main Street reach the potential of **all store fronts to be full**, and new viable business growth awaiting opportunities to be in our town: to protect an area where **community and visitors**

alike want to have a stake in growth, and to embellish and partner with the County, and market the **ever growing wine industry**.

Primary set of goods and services offered (current): Government and professional services (Finance, Insurance, Real Estate)
Primary customer segment served (current): Residents within 8 miles

Working Market Position Statement [concise version, Barman Development Strategies, LLC]
Downtown Berryville specializes in offering government and professional services but also has an abundance of personal care (including wellness) and automotive services as well as complementary "mom and pop" restaurants and retail. Services are primarily offered to residents within Clarke County (approximately 0 to 8 miles out) and secondarily to residents from 8 to 24 miles out. Downtown Berryville also serves visitors from Loudon County (VA) and the eastern edge of West Virginia (24 to 40 miles out), and the Washington DC Metro area who embrace a healthy, natural lifestyle and are seeking a more relaxed and personal experience (a "retreat"); especially women between the ages of 35 and 55 years old (often accompanied by a partner, friend or family member). This later market has the greatest potential for growth especially for the hand grown and made (or crafted) or locally grown and made products niches, and the home décor/art niche (especially practical).

Expanded Market Position Statement *[BMS Economic Vitality volunteers]*

The Town of Berryville is the County seat, with governmental, civic and tourism offices and other public services surrounding Berryville Main Street. Downtown Berryville offers a mix of business services and light retail to the general population of Clarke County and residents from neighboring communities located within a 30-minute drive time. Services and attractions for the agricultural community are located at the approach to Main Street, including the Clarke County Fairgrounds heading south and Berryville Farm Supply at the north end of the Town. The Town is easily accessible via two interstate highways (Route 7 and VA-340), offering the option to bring traffic into town from any direction. Berryville Main Street is a destination for visitors coming primarily from Loudon County, the eastern edge of West Virginia, and the Washington DC Metro area. Visitors from the metropolitan areas in DC and Maryland are seeking a more relaxed and personal experience: an escape from high-stress, densely populated and heavily trafficked mega-cities. Currently, people that visit Berryville would be most likely to return if they are interested in browsing stores run by "mom and pop," are seeking creative alternatives to large commercial retail, or to embrace a healthy, natural lifestyle.

It is widely acknowledged that Berryville's pastoral, small town culture is markedly different from other towns that are located as little as 15 miles away. The Town is unique in that, with support from the community, its civic leaders have sought to preserve and enhance its character through planning and consideration for appropriate commercial uses. Currently, Berryville hosts more traditional, country gatherings like the Clarke County Fair, but offers alongside a re-emergence of farm-to-market enterprises like the Clarke County Farmer's Market. The "living" history of the Town's turn-of- the-century architecture is promoted through events that are held throughout the County, often featuring residents that give a personal narrative of their own experiences. Although there is some decay of the old commercial area that precedes the entrance to Main Street, some of these buildings are being used for local agricultural uses and cottage industries; there are other buildings in this area that could be restored to serve future development.

Although the Town does not currently collect tourism data, Christina Kraybill, owner of My Neighbor and Me - a fair trade retail store, has seen a steadily growing market for hand-crafted and artistic products. Both her customers and those at Elizabeth Mock's Modern Mercantile are interested in hand grown or locally grown and made products with a focus on practical items for the home, home décor, coffee/tea, edibles, clothing, accessories and body care products. Their customers tend to be women between the ages of 35 and 55 years old, and are often accompanied by a partner, friend or family member. Hip and Humble's up-cycled home décor relocated from Strasburg, VA and has successfully re-established their business in Ayler's Mill, a historical building in the old commercial area. Their customers are complementary with other home décor retail on Main Street. Berryville has a few master craftsmen (Tricks of the Trade and P.H. Miller) that draw on long-standing customers and by word of mouth. The artists at Firehouse Gallery draw people looking for unique, locally made and artistic items, bringing in some through events and classes. From observation along, the customer base for other services and retail on Berryville Main Street represents the general, local population. In addition to the stores, there are many creative individuals in Berryville that have an interest in acquiring recycled and raw materials for DIY and artistic projects. The Town's Annual Yard Sales draw a large crowd each Spring and Fall, looking for thrifted and recycled items.

The customer base for Berryville Main Street can be segmented into three groups: 1) people that work in or near Berryville, 2) people that live in or near Berryville but work in areas outside of these communities, and 3) visitors coming from areas located between 30-60 miles. The purchasing power of these groups is also segmented into three groups. People working in food or other service industries may earn anywhere from $35-45K while other professionals earn between $55-80K. Those people living in the area but working in the larger metropolitan areas are likely to be making between $65-100K+. Visitors from Loudon County and Metropolitan DC are likely to be at the higher end of this scale, however they are likely to only frequent those businesses that are located in the 1-2 block area of the Main Street business district.

Transformation Strategies

Transformation strategies are intended to be both vision and market driven. For downtown Berryville, Barman Development Strategies, LLC identified three primary transformation strategies that bring about positive change for future development of downtown.

- Strengthen downtown Berryville's convenience-driven economy
- Strengthen downtown Berryville's visitor-driven economy
- Strengthen downtown Berryville's elder-driven economy

These strategies should be implemented over time as resources (both people and money) become available. This report outlines the work and projects recommended across Main Street's Four Points to assist Berryville Main Street to achieve success with these strategies. Each strategy will require cooperation and overlapping work among the committees and indeed may be developed and implemented through a committee structure, or project by project basis. Each strategy will also require detailed work plans to guide their work with oversight and review by the Board of Directors.

Strengthen downtown Berryville's convenience-driven economy; especially in the areas of government and professional services, personal care (including wellness) and automotive services as well as complementary restaurants and retail. *[Note: The National Main Street Center's "Convenience" Catalyst strategy may provide a starting point]*

FIRST PRIORITY
Develop downtown Berryville's convenience brand
Target = residents of Berryville and Clark County (0 to 8 miles radius, 8 to 24 mile radius, and 24 to 40 mile radius trade areas)

- Design: Design Improvements to develop convenience brand at the point of sale
    - Develop a parking management plan. While the overall downtown development goal is for parking to serve the entire district (e.g. parking concentrated at the entrances to a walkable district and near the anchors), with a convenience brand it is also important to have short term parking conveniently located near convenience businesses. This could be accomplished by maintaining on street parking throughout the district (especially on convenience business blocks) and by designating some of those parking spaces as short term (e.g. 15 minute or 30 minute).
    - Develop a convenient pedestrian circulation system. Walkability will be crucial for a downtown convenience brand and the ability to communicate the convenience of only having to park once.
    - Advocate for planning and zoning to concentrate convenience businesses in the downtown; especially local convenience (in contrast to highway convenience). This will help deter development of more commercial square footage than the market will support. This will also positively contribute to Berryville's visitor brand (below) by maintaining Berryville as a "planned open space community."
- Organization: Develop convenience brand partners
    - Develop relationships between BMS and downtown Berryville's convenience business owners. A stronger relationship would facilitate greater understanding of convenience business needs and goals on the part of BMS, and a greater understanding of district needs and goals on the part of businesses owners.
    - Develop relationships between convenience business owners. A stronger relationship would facilitate referrals and cooperative promotion.
- Promotion: Communicate the convenience brand through image campaigns, special events and business promotions; develop the convenience market – primary target

market = residents within Clarke County (approximately 0 to 8 miles out), secondary target market = residents from 8 to 24 miles out.

   - Create image/branding campaigns. Market the convenience niche and the ability to "power shop." Barman Development Strategies, LLC defines power shopping as the ability to shop at a critical mass of complementary businesses (the ability to complete a handful of related errands) while only parking once.
   - Create special events that foster community. Community mindedness can be leveraged for shop local or shop independent campaigns.
   - Create business promotions that cooperatively market downtown Berryville's complementary business niches; professional services, personal care (including wellness) services and automotive services.
   - Create a shop local or shop independent campaign. Nothing is more convenient than a local (nearby) business; a fact that unfortunately becomes more clear when we lose the local business due to lack of support.
- Economic Vitality: Improvements to businesses and business mix to meet/fulfill convenience brand expectations
   - Work with businesses on repositioning hours of operation to be more convenient. A little primary research will be necessary to determine the most convenient hours, but it can be assumed that hours will need to be extended to be more convenient; open earlier, closed later, open seven days a week.
   - Strengthen existing convenience businesses and attract more; particularly in the areas of government and professional services, personal care (including wellness) and automotive services as well as complementary "mom and pop" restaurants and retail.
      - Help businesses continually refine their market position to stay in touch with their local customers. To be convenient, businesses need to provide the products and services customers want.
      - Convenience restaurants don't have to be fast food, but seating and service need to be prompt.
      - Convenience retail and service includes:
         - Practical home and garden, household goods, children's toys, pet products, personal care, wellness
         - High quality and affordable (value) and healthy options
   - Advocate for the advantages of clustering. When businesses within a niche are located in proximity (clustered), shopping all the businesses in the niche becomes more convenient.

Strengthen downtown Berryville's visitor-driven economy; especially in the areas of hand grown and made (or crafted) or locally grown and made products niches (including agri-tourism), and the home décor/art niche (especially practical). *[Note: The National Main Street Center's "Tourist" Catalyst strategy may provide a starting point]*

FIRST PRIORITY
Develop downtown Berryville's visitor brand; proposed by Barman Development Strategies, LLC to be a "Retreat" brand.
Target = visitors from Loudon County (VA) and the eastern edge of West Virginia (24 to 40 miles out), and the Washington DC Metro area who embrace a healthy, natural lifestyle and are seeking a more relaxed and personal experience (a "retreat"); especially women between the ages of 35 and 55 years old (often accompanied by a partner, friend or family member).

- Design: Design Improvements to develop "Retreat" brand at the point of sale
    - Sidewalk furniture conducive to leisurely shopping (e.g. benches, shade trees). Selection of furniture should also be hand made/locally made if possible.
    - Water features (e.g. fountains and/or splash pad in the town park, strategically located drinking fountains)
    - Calm colors
    - Increased vegetation and general beautification
        - An art or sculpture walk connecting the Barns of Rose Hill to Main Street through the town park.
    - Develop pedestrian circulation system (as recommended for the convenience-driven economy above). Walkability is just as crucial for a downtown Retreat brand and a strolling visitor.
    - Maintain Berryville as a "planned open space community."
    - Leverage Historic Church Street buildings/Courthouse Complex. This area of downtown Berryville clearly has a "Retreat" feel.
- Organization: Develop "Retreat" brand partners
    - Continue partnering with the Tourism Advisory Committee.
    - Develop relationships with "retreat" style visitor attractions (e.g. Holy Cross Abby, Historic Rosemont Manor, local wineries, Barns of Rose Hill).
- Promotion: Communicate "Retreat" brand through image campaigns, special events and business promotions; develop the visitor market – primary target = visitors from Loudon County (VA) and the eastern edge of West Virginia (24 to 40 miles out), and the Washington DC Metro area who embrace a healthy, natural lifestyle and are seeking a more relaxed and personal experience; especially women between the ages of 35 and 55 years old (often accompanied by a partner, friend or family member).
    - Clarke County: Barman Development Strategies, LLC recommends an "Outdoor/Rural Retreat" brand for the county (Agri-Tourism, Restful/Peaceful Outdoor Recreation)
        - Current brand: "We call it home, but you'll call it fun" (Clarke County Tourism http://clarketourism.com/). While this is not a tagline for a retreat brand ("fun" communicates something a little more active/energetic), it does capture both the local market ("We call it home") and the visitor

market ("You'll call it fun"). Current brand messaging includes the following key words and phrases that are consistent with an Outdoor/Rural Retreat brand: "oasis," "planned open space community," "scenic beauty," "view of the mountains," "view of the valley," "just a relaxing sight seeing tour of unspoiled countryside," "serene," "tensions ebb."

- Downtown Berryville: Barman Development Strategies, LLC recommends a "Berryville RFD Retreat" brand for the downtown (playing off Mayberry RFD).
    - Current brand: "Where Town Meets Country" (Berryville Main Street: www.berryvillemainstreet.org) *[Comment: This tagline is included here because it is more district than corporate identity; even though it may have been intended as a corporate tagline.]* While this is not a tagline for a "Retreat" brand, it is consistent with a "Berryville RFD" brand.
    - Once a year (maybe in May) host an over the top "MayBerryville" event – Meet the characters of Berryville in a way that reinforces downtown Berryville's market position and brand.
        - Meet the sheriff, deputy, mayor, and county clerk – local government
        - Meet the barbers (like Floyd the barber) – personal care services
        - Meet the teachers (like Helen Crump) – education
        - Meet the mechanics (like Goober and Gomer Pyle) – automotive services
        - Meet the handymen
        - Meet other Berryville characters (like Otis?)

      This event would not only communicate the "Berryville RFD" brand to visitors, but would communicate the convenience brand to local residents.
- Create a business promotion that cooperatively markets downtown Berryville's personal care (including wellness) services *[Note: This promotion would also serve as a business promotion for the convenience-driven economy].* Personal care service businesses can provide spa services to retreat visitors; so long as they accept walk in customers or partner with overnight lodging businesses for visitor reservations.
- Develop cultural tourism. Berryville has an abundance of cultural history to leverage, and cultural or heritage tourism complements retreat tourism. Barman Development Strategies, LLC's favorite cultural history assets to leverage:
    - The story of Josephine City (1870), a self-sufficient African American community, at the time on the outskirts of Berryville, now located in town limits.
    - The story of farming, horse, and hunt culture- lots of horses and protected farmland surround the town
        - Blue Ridge Hunt
        - Clarke County Fair
        - Local farms, nurseries, wineries
        - Clarke County Farmer's Market

- Economic Vitality: Improvements to businesses and business mix to meet/fulfill "Retreat" brand expectations.
  - Grow entrepreneurs offering hand grown and made (or crafted) or locally grown and made products niches (including agri-tourism), and the home décor/art niche (especially practical).
    - Explore feasibility of a Farm Kitchen/Community Kitchen to support agri-tourism and home grown, "home cooked" products
  - Advocate for a Boutique Hotel to locate downtown. While the visitor market may currently be more of a daytrip market, a Retreat brand calls for and will target an overnight visitor. Leverage potential synergy between a boutique hotel and the Barns of Rose Hill, Rose Hill Park, and complementary "mom and pop" restaurants and retail. Hotel feasibility showed market for a boutique 15-20 or up to 40, as well as more meeting space.
    - Support the rehabilitation of Battletown Inn for overnight accommodation. The Battletown Inn could complement a Boutique Hotel, leaning more toward the RFD portion of the brand with the Boutique Hotel leaning more toward the retreat portion.
  - Offer hospitality training and encourage businesses to offer hospitality services such as concierge services.

Strengthen downtown Berryville's elder-driven economy (youthful retirees/empty nesters) *[Note: The National Main Street Center's "Elderly" Catalyst strategy may provide a starting point].*

- Design: Design Improvements to accommodate youthful retirees/empty nesters
  - Invest in accessibility in downtown Berryville's public spaces, and facilitate accessibility improvements within downtown properties and businesses.
- Organization: Engagement of youthful retirees/empty nesters, partnerships with organizations that also target youthful retirees/empty nesters
- Promotion: Messaging targeting youthful retirees/empty nesters, events that appeal to youthful retirees/empty nesters
  - The good news is that resident youthful retirees/empty nesters should respond well to the convenience message and visitor youthful retirees/empty nesters should respond well to the "Retreat" message. There is a lot of positive synergy between these three transformation strategies.
- Economic Vitality: Improvements to businesses and business mix (addition and repositioning) to serve youthful retirees/empty nesters.
  - Strengthen existing businesses that appeal to or target youthful retirees/empty nesters. Personal care (including wellness) service businesses may be key here since the older we get the more we spend on wellness.

Strategies that support all the transformation strategies above:

- Identify and work to resolve the key issues that have a negative impact on existing and potential Berryville Main Street businesses *[particularly businesses in the convenience-driven, visitor-driven, and elder-driven economies]*

- Identify a public process to bring together community leaders, commercial property owners, entrepreneurs, and other interested parties to work toward a shared vision for future development (and hopefully to also strengthen support for Berryville Main Street). Consider regularly scheduled Economic Summits as well as Town Meetings. Economic Summits should include all economic partners and could initial revolve around dream marketplace exercises (see Downtown Development Plan Philosophy Attachments). Town meetings could revolve around vision exercises.
- Stimulate strategic and market driven investment in the historic core. Investments within the realm of one of the three Transformation strategies should be strategic and market driven. Market data within the Esri Data Attachment will also help BMS and investors stay market driven.
- Facilitate market rate commercial spaces. The key here is market rate for Berryville. The Berryville market doesn't and likely won't ever support rents for commercial spaces at the levels of Loudon County (VA) and the Washington DC Metro area. Local commercial property owners and realtors should already have a sense for prevailing commercial rents for Berryville, but their intuitive knowledge should be supported with hard data. BMS, ideally with an independent partner, should survey commercial rents to determine average rents per square foot. It may be discovered that existing rents are not market driven. They may for example be relationship driven (charging lower rents for friends and family), habit driven ("that's what we've always charged"), or expense driven (owners with low expenses charging below market rents while owners with high expenses charging above market rents). Below market rents are not good because they facilitate marginal tenants and don't facilitate building maintenance and improvement. Above market rents are not good because they inhibit or hinder business startup.
- Bridge marketplace barriers/interruptions
  - Stimulate compatible uses (clustering); fill vacancies and consider relocations to strengthen clusters.
  - Work to remove physical and psychological breaks in downtown's "shopping" or strolling flow; work to improve downtown's pedestrian script.
    - See Annotated Pictorial Attachment to this report
    - Infill or activate key vacant lots
    - Mitigate existing parking lots, curb cuts, and green spaces/pocket parks within the storefront sequence or script; reduce future occurrences
    - Mitigate existing blank building faces and building faces without an entrance; reduce future occurrences
    - Invest in civic improvements such as wayfinding and ADA accessibility. See Developing a Wayfinding Program Attachment.
    - Design for walkability throughout the downtown. For example, explore effective, attractive, affordable options to connect the Barns of Rose Hill (which is also the Clarke County Visitor's Center)

with Rose Hill Park, Main Street, Crow Street, Church Street, the Courthouse, and the former Battletown Inn.

- Explore ways to create a climate in which new anchor businesses may be established *[particularly anchors for the convenience-driven, visitor-driven, and elder-driven economies]*
    - Explore feasibility of adaptive reusing the Coiner Building
    - Explore feasibility of a boutique hotel near The Barns with public dining options (see discussion above)
    - Explore civic anchors (e.g. the sculpture walk discussed above, museums, libraries, community centers, gathering or performance spaces)
- Support Berryville's agricultural base and preserve the Town's culture and character *[particularly by forging market ties between Berryville area's agricultural economy and downtown Berryville's convenience-driven, visitor-driven, and elder-driven economies]*
    - Work with downtown businesses to feature locally grown food, and locally produced food and beverages (value added agriculture)
    - Explore use of the old commercial area for locally producing food and beverages (e.g. a craft brewery)

Transformation supportive Scope of Work

Organization *[Transformation supportive excerpts from VMS facilitated Berryville Main Street Board Retreat. All of these are endorsed.]*

- Fundraising event – wine/beer event with artesian (7 total dots – 5 soon & 2 later) *[Visitor-driven economy in particular]*
    - 3 wineries in Clark County
    - Berryville Days
    - Art & wine event
    - This will allow us to partner with wineries around the area, Bring in visitors & funds for BMS
    - Event "Let's Wine About Winter" – mobile store to store and restaurant wine tasting

Organization *[Transformation supportive excerpts from Berryville Main Street Work Plan July 1, 2015 to June 30, 2016. All of these are endorsed.]*

- Expand liaisons with other community organizations and media
    - Establish working contacts with the Historical Association, Blandy, Long Branch, Josephine Museum, Barns of Rose Hill *[Visitor-driven economy and elder-driven economy]*
- Establish Partnership and Create Merchants Group sub-committee
    - Build working relationship with town and county boards and merchants group; local media *[Convenience-driven economy in particular]*

Economic Vitality *[Transformation supportive excerpts from VMS facilitated Berryville Main Street Board Retreat. All of these are endorsed. Convenience-driven economy, visitor-driven economy, and elder-driven economy.]*

- "I wish I was..." creative event for vacant storefronts (6 soon dots)
- Dinner with landlords (2 soon dots)

Economic Vitality *[Transformation supportive excerpts from Berryville Main Street Work Plan July 1, 2015 to June 30, 2016. All of these are endorsed. Convenience-driven economy, visitor-driven economy, and elder-driven economy.]*

- Establish relationships with building owners
    - Continue conducting interviews with building owners to assess interest and/or willingness to lease or improve their buildings; include inventory of buildings.
    - Enforce Blight Control
- Foster new business growth
    - Continue to Sponsor "Entrepreneur Express" workshops; pass along SBDC and Lord Fairfax CC continued ed.,

Design *[Transformation supportive excerpts from VMS facilitated Berryville Main Street Board Retreat. All of these are endorsed.]*

- Wayfinding signs – VMS grant for implementation (8 total dots – 4 now and 4 soon) *[Visitor-driven economy in particular]*
    - Public awareness of where stores are located

Design *[Transformation supportive excerpts from Berryville Main Street Work Plan July 1, 2015 to June 30, 2016. All of these are endorsed.]*

- Diminish negative impact of empty store fronts *[Visitor-driven economy in particular]*
    - Showcase Art work of local and regional artists, as well as historical pictures, in empty store front windows and items from merchants directing to their businesses.
    - Continue to add flower planters to the streetscape. Window washing on Main Street.
    - Connect Old Hotel owner with Frazier and Assoc.
- Put pocket parks in two alleyways on Main Street per suggestion by Marc Willson *[Visitor-driven economy in particular]*
    - In discussion with David Hill of Roanoke re: grant requests and design of parks
- Evaluate areas on Main Street that would enhance the concept of a walking downtown *[Convenience-driven economy, visitor-driven economy, and elder-driven economy.]*
    - Discuss with business owner and with adjoining neighborhood.
    - Identify projects that need some image attention.

Promotion *[Transformation supportive excerpts from Berryville Main Street Work Plan July 1, 2015 to June 30, 2016. All of these are endorsed.]*

- Promote the downtown experience *[Convenience-driven economy in particular]*
    - Berryville Main Street Festival, Yard Sales, Arts & Crafts, Music in the Park
- Promote shopping in Berryville during the Christmas Season *[Convenience-driven economy in particular]*

- Holiday Parade
    - Parking Meter Contest
    - Memorial Luminaries
    - Tree Lighting Ceremony
    - 1500 give away
- Engage merchants in Berryville Main Street culture *[Convenience-driven economy in particular]*
    - Membership Drive
    - $1500 Merchant Giveaway
    - Yard Sale (2X)
    - Ghost Tours
    - Progressive Dinner
- Keep Partnerships *[Visitor-driven economy in particular]*
    - Rosemont Manor, Clarke County Historical Association, the Barns of Rose Hill, Clarke County Farmers' Market
    - Appalachian Trail Group

Current Berryville Brand:

- Berryville Main Street: **Where Town Meets Country** http://www.berryvillemainstreet.org/ *[More district than corporate identity]*
- Clarke County Tourism http://clarketourism.com/
    - **We call it home, but you'll call it fun**
    - Outdoor Adventures, Arts and Entertainment, Historic Attractions, Wineries
        - Barns of Rose Hill (Berryville)
        - Berryville Main Street Summer Crafts and Farmers Market (Berryville)
        - The State Arboretum of Virginia/ Blandy Experimental Farm
        - Burwell – Morgan Mill (Village of Millwood)
        - Clarke County Fair and Event Grounds
        - Dinosaur Land
        - Long Branch Historic House and Farm
        - Watermelon Park
        - Clarke County Historical Association Museum (Berryville)
        - Holy Cross Abbey Monastery
        - Josephine School Community Museum (Berryville)
        - Old Chapel
        - Shenandoah River, Appalachian Trail, Bicycling, Shenandoah River Campus at Cool Spring Battlefield, Horseback Riding, Watermelon Park
    - *[Emphasis added]* Clarke County has become an **oasis** for the Washington, DC and Northern Virginia traveler... As soon as you crest the Blue Ridge Mountains into Clarke County you will know why Clarke County is referred to as the oasis. At the foot of the mountain is the Shenandoah River and beyond

this famed American river are miles of gently rolling hills. This **planned open space community** provides not only **scenic beauty** but hiking on the Appalachian Trail, fishing, canoeing, rafting, and kayaking on the Shenandoah River and award winning wineries where you can choose the **view of the mountains** or a **view of the valley** below. Dining experiences range from a 5 star country inn and restaurant, to down home cooking at its very best. Entertainment of all types are around practically every bend and includes anything from art shows to music venues to hot air balloons and last, but hardly least, the many historic sites and museums. Fairfax

Clarke County was the home of Lord Clarke, Revolutionary War General Daniel Morgan, George Washington's daughter Nellie Custis and the birthplace of Robert E. Lee's wife, Mary Anna Randolph Custis. With only 14,500 people living in the entire county, Clarke County's rich history can still be viewed as it was 200 years ago.

Whether your interest is outdoor adventures, cultural and historic, arts and entertainment or **just a relaxing sight seeing tour of unspoiled countryside**, Clarke County is the place for you. Though Clarke County is only one hour from the Metropolitan Washington, DC area, we are a world away!

- Regional Brand tied to the Shenandoah Valley http://www.visitshenandoah.org/Destinations/Clarke-County,-Virginia.aspx
  - *[Emphasis added]* This **planned open space community** provides not only **scenic beauty** but hiking on the Appalachian Trail, fishing, canoeing, rafting, and kayaking on the Shenandoah River. Sky Meadows State Park offers more than just hiking and nature programs, visitors can picnic, horseback ride and camp... Award winning wineries where you can choose the **view of the mountains** or a **view of the valley** below, entertainment of all types are around practically every bend and includes anything from art shows to music venues to hot air balloons... You will find Clarke County to be a truly unique experience. The bustling air of the built-up areas to the east seems to soften as you cross the Blue Ridge. The Shenandoah flows **serene**, and **tensions ebb** as you watch it's stately progress. Come visit with us in **Clarke County, Virginia's best kept secret!** *[Note: Still refers reader to Clarke County Chamber of Commerce]*
  - *[Question: How is Clarke County/Berryville distinct from Warren County/Front Royal?]* http://www.visitshenandoah.org/Destinations/Front-Royal-Warren-County,-Virginia.aspx

Final Note

National Main Street Center
a subsidiary of the
National Trust *for* Historic Preservation

DEVELOPING A WAYFINDING PROGRAM

Wayfinding is what people do when they are traveling to and through a space. Wayfinding systems involve the science and art of scripting people's travel to and through that same space. Communities should strive to provide good customer service and prevent frustration that would accompany difficulty finding a destination; particularly a public destination. Their broader goal should be for people to discover all the other assets within the community; including unplanned destinations. In other words, sequence people's movement into and through the community to their advantage; script the theater of their community.

To use the analogy of retail business, the best businesses create an environment where customers not only find the product that was on their shopping list, but also make "surprise" discoveries. From a business perspective, the "surprise" was not an accident but was intentional and influenced through all aspects of store design and layout including but certainly not limited to signage. The goal is for customers to be exposed to as much of the store's product as possible, but especially the products that command the highest profit margin. Products that aren't found are products that aren't bought. The same holds true for communities. If you think this analogy is a stretch, think about how communities could benefit if their customers (tourists, current and future residents, property owners, businesses/employers, etc.) discovered and used more of their community's assets. Finding those assets that do exist can dramatically impact people's assessment of the quality of a community; ultimately affecting their desire to come back for a second visit or to stay. Every community would also love visitors to only drive through the most attractive parts of town and to see their community from only the best vantage points. Main Street organizations of course want everyone to drive through downtown.

However, simply signing a personally "chosen" route may not ultimately change the behavior of people. People will chose their route based on a variety of factors such as the shortest route, the fastest route, the safest route, or the most scenic route. Even more important than those decision factors is the destination they have in the front or back of their mind before they even start their vehicle. For example, downtown may not currently be perceived as an attractive destination or as a destination at all. In other words, if people already have it in their head that they are going someplace else (e.g. Wal-Mart) the best signage in the world will not get them to take a community's personally "chosen" route.

Community wayfinding is therefore much more than directional signage. Wayfinding is an integral part of both our design vocabulary and our communication strategies. Before a trip, people start their wayfinding by relying on what they know and think they know (perceive) about their destination and route alternatives. This is where all our communication and marketing efforts come into play including but not limited to printed maps. In this way promotional activities such as walking and driving tours can help complement your wayfinding goals and help with wayfinding before the trip. However, don't underestimate the influence of Internet mapping services such as Mapquest, Google Maps, etc. While driving, people continue their wayfinding by relying on onboard navigation services (GPS), auto oriented signage, and landscape cues (more on this later). While walking, people complete their wayfinding by relying on pedestrian-oriented signage, a different set of landscape cues, and on-premise signage. People unfamiliar with an area, including visitors and residents outside their normal routine, often rely on verbally-shared directions and referrals, hospitality, for their wayfinding.

Most people have been exposed to formally designed wayfinding systems in malls, museums/amusements, hospitals, and airports. Most of these are interior wayfinding systems, but we can learn important lessons from those systems that can help us design our wayfinding system. These institutions often devote significant resources to design and implement their systems. The reader is encouraged to become a student of all wayfinding systems, not just the community wide/public versions.

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As an exercise, share stories of contexts where your wayfinding went smoothly, and why, as well as where it didn't, and why. To expand on some of the concepts presented above:

- Many people don't research the geography/layout of a place prior to a trip; hoping to instead rely on their sense of direction (aided by landscape cues and signage when it's present).
- Many people don't explore until they have found their target destination to ensure they have the time to wander (although they may make note of what they pass in case they have time to go back). This exploration includes parking. Determining the best way to integrate parking into your wayfinding system could be a major study in and of itself. People will be looking for signs that communicate not only the location of parking, but whether it is free and for how long. Most people won't select a parking space until they have sight of their final destination. People will also drive around looking for the closest parking.
- Sometimes our destination is not part of a wayfinding directional system, but we have learned from experience that it can be reliably found in association with other familiar and signed destinations. For example, most people will first assume that government offices are downtown unless otherwise notified. If your government offices are located where people expect to find them, namely downtown, those offices may only need to appear on wayfinding signs on the edge or within downtown (saving space on signs for other attractions).
- Once a person begins to follow signs directing then to any particular attraction, they expect the signs to take them all the way to or past that attraction. It is extremely frustrating for an attraction to show up on an early sign (maybe because there happened to be room to add an extra attraction) and then for it to disappear from the sign at the next decision point. Without instructions to turn, a person will assume they should continue straight. They will be angered if that guess was wrong.
- Return trips can be even more challenging from a wayfinding perspective so help visitors find their way home too. The landscape looks completely different coming from a new direction (no matter how much a person thinks they will visually remember their way in reverse). Sometimes the return route requires a person to use different roads. As much as we may want them to never leave, getting lost on the way home will leave visitors with a negative last impression.

The following are common landscape cues or visual triggers that communicate "downtown" without requiring a sign:

- Building density (density typically increases as we approach a downtown)
    - Setback (buildings typically move closer to the sidewalk as we approach a downtown)
- Building height (buildings typically get taller as we approach a downtown)
- Building age/quality (buildings typically get older and exhibit higher quality materials and details as we approach a downtown)
- Pedestrian amenities (downtown commercial districts typically welcome pedestrians)
    - Sidewalks with furniture (downtown commercial districts typically have sidewalks where strip commercial developments don't)
    - Pedestrian scale lighting (downtown commercial districts typically have pedestrian scale lighting while strip developments don't)

Will you still need a wayfinding system once everyone has an onboard navigation system? To answer that question we would need a better idea of what compels someone to stray from the directions they are receiving from their onboard navigation system. In the least, we may need to place more emphasis on wayfinding once they leave the car. Do you need temporary wayfinding at large events? The answer to that question is usually yes.

Recommendation: Critique/select gateways/entrances. It is important to acknowledge that gateways and entrances exist wherever and however people enter downtown. We can't sign them all, which is a case in point for the importance of landscape cues. However, we can identify primary entrances.

Recommendation: Map public attractions. Brainstorm public attractions. Which attractions are most important or a priority to include on wayfinding signage is largely dependent on the location of each individual sign within the system. Each major decision point needs a sign and each sign should provide a directional arrow toward the attractions reached from that location (up to a maximum of five). The trick is deciding which five.

Recommendation: Propose wayfinding sign locations/sign content. Gateways/entrances, vehicular decision points, pedestrian decision points, etc. are all going to require different styles of signs. A rule of thumb is to locate wayfinding signs at least at every major intersection, and at any other major decision point throughout the downtown and community. That said, be cautious to not overdo it. Having too many signs can be as confusing as not having enough. Place signs at least 20 yards before the intersection so travelers have time to react after reading the sign. Place signs on the right hand side of the road since travelers are conditioned to look to the right for information. Each sign should contain no more than five lines of text, with the text large enough to read from a block away (typically at least 6" tall lettering). The best way to ensure legibility before investing in production is to create a mockup and set that mockup at one of your sign locations and then drive by it. Each sign should also incorporate a logo consistent with all other downtown or community branding. A professional consultant (e.g. a graphic designer) can help with the design process. See also "Community Wayfinding" by Kathy Frazier, Kathy Moore, and Sandy Hanger, Main Street News, Issue 235, December 1, 2006.

Recommendation: Propose/offer design improvements to enhance wayfinding. The biggest wayfinding weaknesses are often uncontrolled signage and lack of visual design cues. Collective sign clutter lessens the effectiveness of each individual sign. To be blunt, if everyone puts up directional signs, a person will have a hard time seeing any one sign. You can go a long way toward improving your signage system by first maintaining existing necessary signs and second by removing unnecessary signs; addition by subtraction. When it is unlikely someone will decide on impulse to divert their course upon seeing a particular sign then other ways of communicating/marketing may be more effective. For example, like attractions could cooperatively produce a brochure (to influence/assist people before a trip) rather than pepper the landscape with competing signs.

Reevaluate sign guidelines to ensure quality. This includes looking at criteria with respect to lit signs. In some cases existing signs need more lighting in other cases less. The most complex measure would be to evaluate land use policies to ensure that development contributes positively to wayfinding (see discussion above about landscape cues or visual triggers that communicate "downtown"). Adjacent and overlapping municipalities may all need to partner to evaluate land use policies. It will be crucial for there to be a seamless transition from one wayfinding system to another (e.g. from downtown's pedestrian system to the city's system to the county's system.) In other words, the three systems must coordinate to pass travelers off between them.

DOWNTOWN DEVELOPMENT PLAN PHILOSOPHY

The Downtown Development Plan Philosophy picks up where the Economic Development Philosophy leaves off; with the concrete and compelling vision of a fully functioning future downtown marketplace. Successful private, for-profit commercial developers attract investors and tenants by helping them see a vision of themselves making money as part of a successful place. That vision is founded on:

- A sound market position and marketing plan;
- Well-developed and managed leasable space; and
- A well-designed clustering/leasing plan.

It also helps if the private, for-profit commercial development company is a credible, trusted, and well-run business. Similarly, a Main Street program can be a credible, trusted, and well-run *nonprofit* business operating as a commercial developer, and can attract entrepreneurs and investors by understanding how its own marketplace functions and proactively designing its own dream marketplace.

Successful private, for-profit commercial developers define a market to go after, and use numbers (e.g. demographics) to inform their decision-making. They position their developments within regional and local markets and do targeted market research to gauge if there are enough of the right customers available to support the amount of leasable space. They don't do business-specific market research; leaving each potential business tenant and investor to run his or her own numbers to inform their own decision-making. Similarly, a Main Street program should use numbers to inform its decision-making and shape how they:

- Develop space (design);
- Develop markets (promotion);
- Develop businesses (economic restructuring); and
- Develop partners (organization)

Main Street programs can use the numbers along with local experience and a little gut intuition to settle on a market position — a commercial district specialization or niche based on a primary consumer segment served and/or a primary set of goods and services offered (what the district is best at selling and to whom). The goal is to differentiate; to be memorable and remarkable so consumers consistently choose your commercial district over the competition.

Successful private, for-profit commercial developers develop their space to visually communicate a brand message and to encourage exploration. They attempt, through science and art, to script people's movement into and through their development to their advantage; script the "theater" of their space. Think about a mall, for example. Its floor plan includes commercial spaces on the edge of the development that serve as points-of-entry and accommodate anchor businesses. Parking is concentrated near those points-of-entry. The majority of interior commercial spaces (called inline spaces) are arranged between those anchor spaces. The goal is for potential customers to find (or, really, be exposed to) as many businesses as possible through a sequence of storefronts that is interesting and uninterrupted. Research shows that breaks in the sequence will cause a person to lose interest, stop, and turn around. People won't find businesses beyond that point so won't shop those businesses. Therefore inline storefronts are designed to be narrow, frequent, with proximity to and lots of visibility from the pedestrian traffic flow (just like the way historic commercial districts originally developed).

Likewise, Main Street programs need to develop space that stimulates strolling so that customers shop the district and not just a single destination business. Single destination shopping misses opportunities to share customers and strains on-street parking spaces. With a strong commercial district brand and space that stimulates strolling, customers and parking can be shared and parking can work well located near the gateways to the district. For downtowns, anchors can be a little further removed (e.g. residential units, employers), so proactively designing for multimodal transportation is also key. If I can walk or bike between where I live and work, and if that path takes me past downtown storefronts, I am a downtown customer waiting to happen.

Successful private for-profit commercial developers also use science and art to lease their space to create not only a critical mass, but an effective combination of businesses to attract the available customers. The collective – all of the businesses in the district together – determines commercial district success. It's not just design that makes a storefront interesting (and keeps a person strolling/shopping), it's the business visible through the storefront.

In today's global economy, downtowns rarely become strong marketplaces thinking about one property at a time, one lease at a time, or one business at a time. Independent and impulsive leasing results in weaker marketplaces than cooperative and strategic leasing. The axiom for real estate has always been location, location, location. The fact is that locating a business downtown is simply not enough; its placement on the street strongly affects its chances of success. Businesses need to be clustered and should consider paying more rent to locate closer to complementary businesses. Remember, customers are often attracted to a commercial development by an anchor and look for parking near that anchor, but will stroll from that anchor all the way to another anchor if they find each business and attraction they pass interesting. Part of the challenge is that different consumer segments will find different businesses and attractions interesting.

While Main Street programs won't likely be able to actively cluster businesses through lease management (they don't own or control the properties), they can indirectly inspire owners to cluster by communicating (selling) the downtown development plan. Three-way communication among the Main Street Program, property owner, and business owner about the financial benefits of following a clustering plan is the key to success. (For more information see www.uwex.edu/ces/cced/downtowns/dma/18.cfm.)

Finally, successful private, for-profit commercial developers are good at communicating their development vision and selling their development proposals to potential reviewers, funders, and tenants by using verbal descriptions, architectural renderings, and diagrams or schematics. That is why they are able to get approval, attract investors, and lease space even before they break ground. Main Street programs need to use similar tools to attain similar results. The downtown development plan should communicate a vision for the physical development of the district as well as a strategy for leasing; the more specific, the more useful. The leasing plan should include strategies for arranging or locating current and future businesses within the mix to positively impact foot traffic and sales. The best process for crafting a downtown development plan is a participatory process involving creative brainstorming and hypothetical rearrangement and addition of businesses within the district to visually map out or model the ideal business district.

MAIN STREET AT WORK

By Todd Barman, Program Officer,
National Trust Main Street Center

DESIGNING A MARKETPLACE

What's happening on Main Streets now? What are the best practices, the newest strategies, the lessons learned? In this column, National Trust Main Street Center staff will share the latest trends and successes from the field.

Communities need to transform knowledge of the market into proactive design of a marketplace. A lot of communities hope that a market analysis can dictate which businesses (including real estate investments) are likely to be successful. Market opportunities are often "calculated" ***one business at a time*** according to generic classifications of business types. But it is the collective, not the individual, that determines commercial district success. Your downtown will not become a strong marketplace thinking about one property at a time, one lease at a time, or one business at a time.

It will take a concrete and compelling vision of a fully functioning future marketplace to attract the entrepreneurs and investors who will eventually realize that vision. Commercial districts that outcompete downtown attract businesses by using a sound market position and a well-designed clustering or leasing plan to sell potential business owners on their ability to become part of a successful place.

In Chapter 9 of *Revitalizing Main Street,* entitled "Improving Commercial Dynamics," I wrote a section on clustering businesses in which I stated that a clustering plan would help entrepreneurs decide where best to locate in your district. In hindsight that statement did not go far enough. You need to more fully understand how your downtown marketplace functions and can function to help investors decide how best to invest.

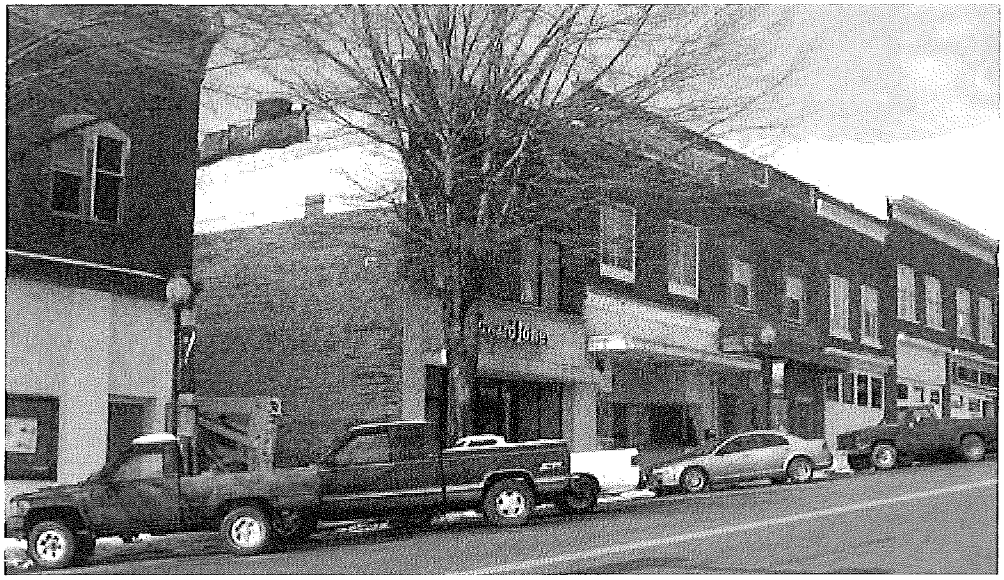
I noted that Main Street programs probably won't be able to actively cluster businesses through lease management. While that may be true, Main Street should develop a leasing plan. Independent, impulsive leasing produces weaker marketplaces than cooperative, strategic leasing. While it remains true that Main Street's Economic Restructuring Committee must be strategic, it may not need to be patient or subtle. It will not pay to present downtown as being desperate. To be successful, downtown needs to approach revitalization from a confident position of strength; it must be proactive not reactive.

Successful commercial developers lease their space to create the right combination and critical mass of businesses to attract available customers. They use the numbers – the demographics – to understand their position in the regional and local markets and to ensure that enough of the right customers are available for the assembled businesses to break even or better. They don't do business-specific market research. Main Street needs a similarly choreographed process to stimulate reinvestment by many independent and neighboring property and business owners. This is an art of combination that must be consistent with the market position and checked against the science of the market and the reality of any given space.

Market analysis pursued by a Main Street organization needs to inform that program's decision making in all areas:

The best strategies or steps for filling vacancies in historic commercial districts are to:

1. **Retain existing businesses** so you don't have new vacancies and can help businesses expand or spin off. The business owners who are already successful in your district are the best prospects for starting new enterprises. They can open a second business that perfectly complements their first and adds to the critical mass of businesses necessary to attract customers to the district.
2. **Passively recruit prospective businesses** that find you without any targeting on your part. Inquiries will increase with an organized business owner attraction program.
3. **Establish a business owner attraction program.** Recruited businesses can fail even if a market opportunity exists and businesses that you didn't recruit can flourish even if a market opportunity wasn't identified. It all comes down to the quality of the business owner.
4. **Develop and support entrepreneurs.** The majority of businesses that are attracted to historic commercial districts are independent "mom & pop" entrepreneurs with some existing tie to the community that can be captured through steps 1-3 and then supported and grown through step 4.
5. **Actively recruit (last, and in many ways, least).** Any effort or expenditure to actively recruit new businesses will fail if steps 1-3 are not in place and may not be necessary if steps 1-4 are in place.



Todd Barman worked with Altavista, Va., to help the Main Street program, Altavista on Track, transform its knowledge of the downtown market into proactive design of a marketplace. During an Economic Restructuring Technical Assistance visit, he facilitated a brainstorming exercise to flesh out a downtown market position: "Downtown Altavista specializes in establishments that make life simpler. Neighborhood residents, downtown employees, visitors to the many civic gathering spots, and rural retirees, have easy and convenient access to the basic products and services they need everyday and want with personal attention from independent businesses."

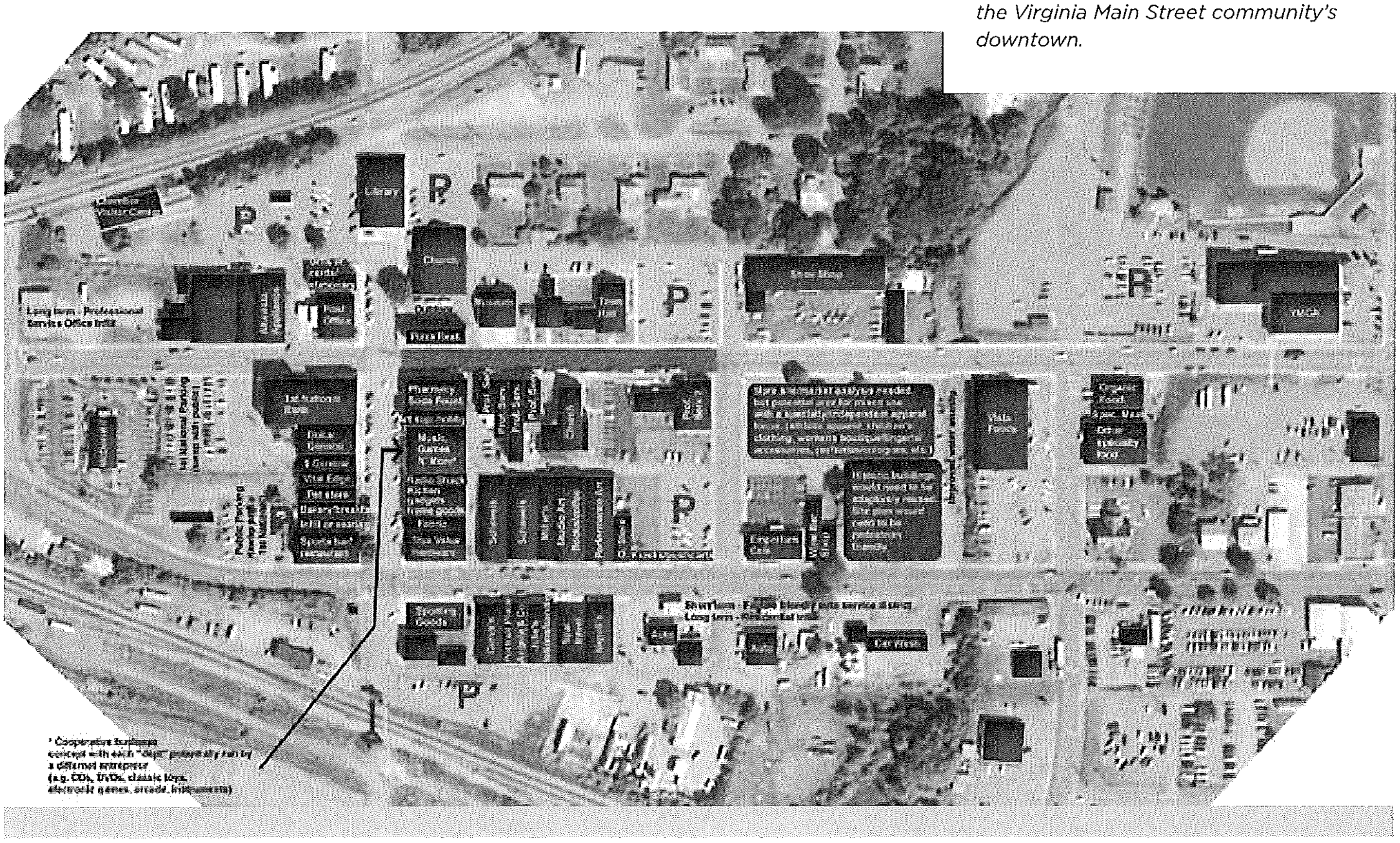
shape how it develops space (design), develops businesses (economic restructuring), develops customers (promotion), and develops partners (organization) – actions leading to the right combination and critical mass of businesses to attract that commercial district's available customers. Main Street programs should expect all potential investors to run their own numbers to make their own decisions.

Thinking like a commercial district developer involves:

- Defining and refining a market position for the downtown;
- Managing the downtown business mix and clusters; and
- Fully utilizing valuable space; and
- Selling development proposals to potential reviewers, funders, and tenants.

Successful commercial developers are good at communicating their development vision using verbal descriptions, architectural renderings, and diagrams/schematics. That is why they are able to get approval, attract investors, and lease space even before they break ground. The NTMSC is working to empower Main Street programs to use similar tools to attain similar results.

After helping Altavista on Track develop a market position, Todd Barman worked with the group to draft a Clustering/Leasing Plan for the Virginia Main Street community's downtown.



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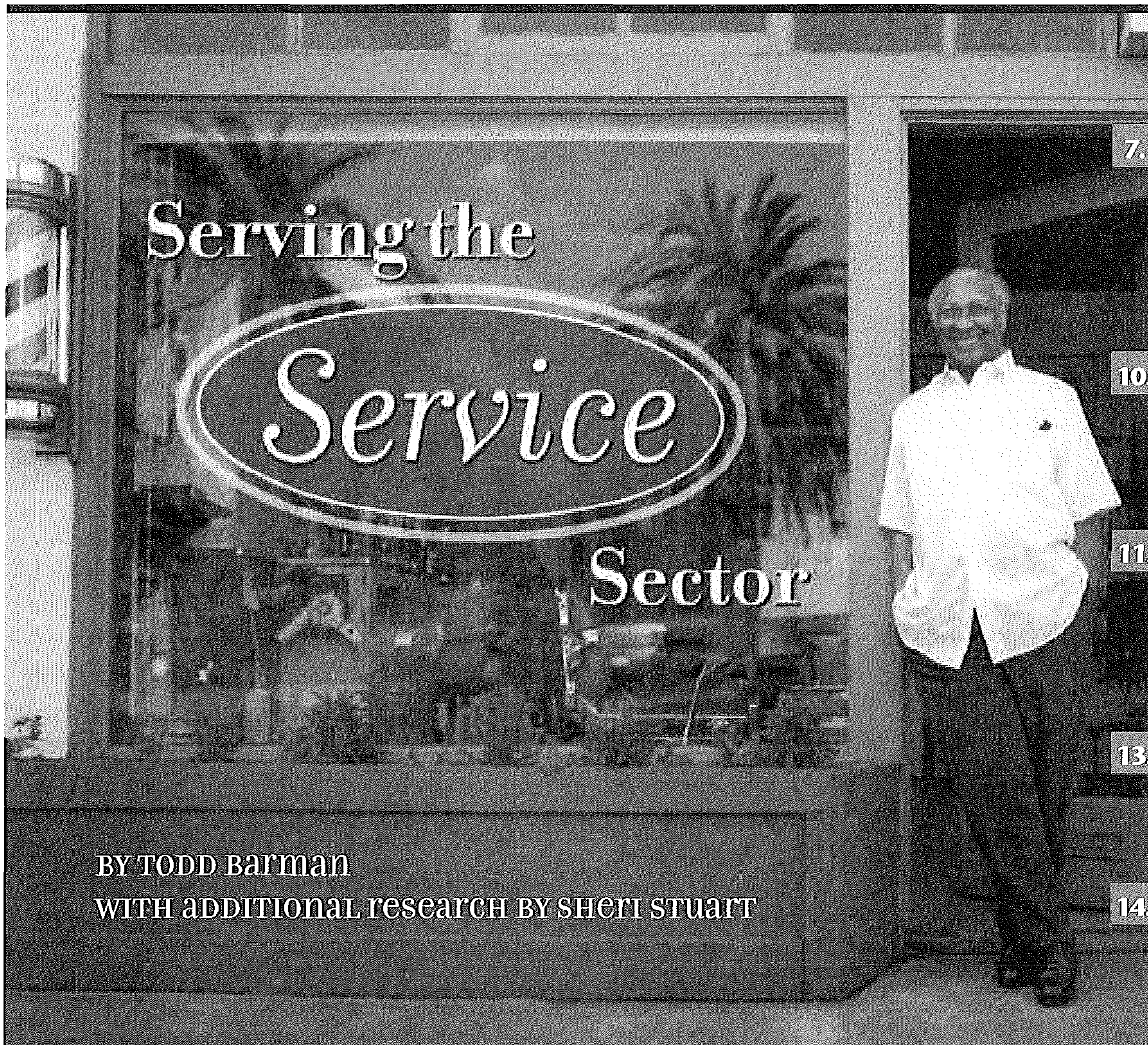

Serving the *Service* Sector

BY TODD BARMAN
WITH ADDITIONAL RESEARCH BY SHERI STUART

Are service business owners in your downtown happy with the support they receive from your organization? Do your promotion and business retention activities help their businesses? Do they feel included in your mission? Have you asked them what they need from you to be successful? More importantly, is their success as important to you as the success of their retail neighbors? Do you devote the same level of volunteer and financial resources to serving the service sector as serving the retail sector? If not, why? Is it because you believe they don't need your help as badly, or would you honestly prefer that they gave up their current location in the downtown to a retail business?

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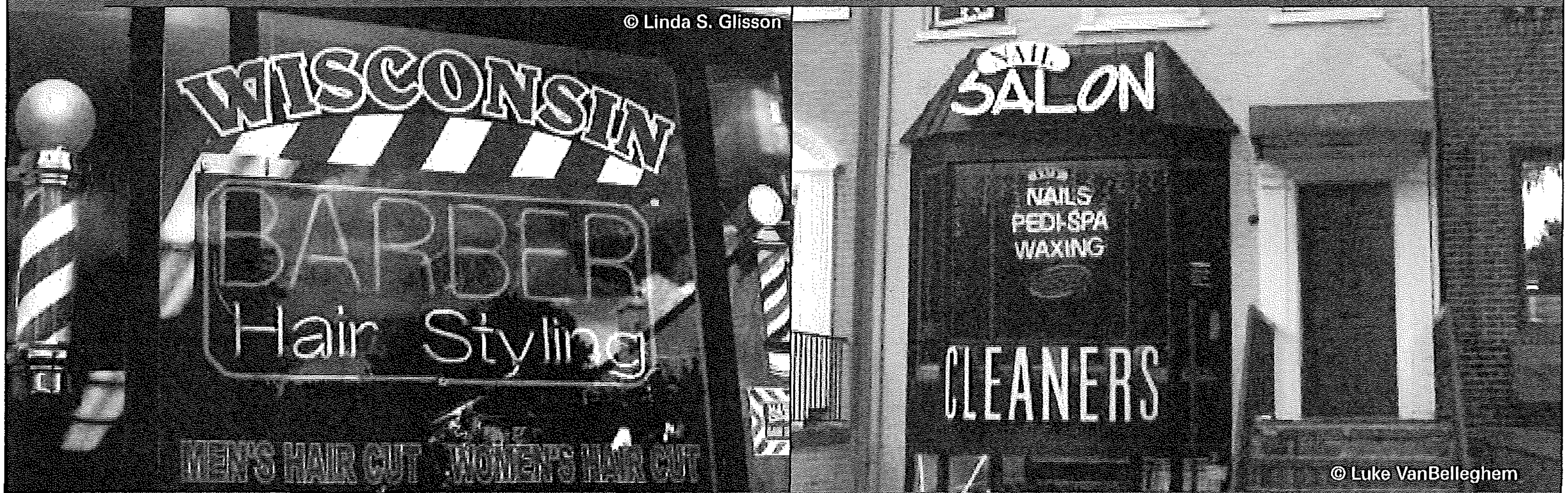
Serving the Service Sector



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Historically, local Main Street programs have been better at asking their downtown service businesses for help than asking them what they need. To the credit of those service businesses, they have come through time and time again. Service business owners and employees often provide the leadership to get Main Street programs going and energy and skills as active participants on boards and committees to help the organization thrive. The fact is, downtown service businesses are not only important stakeholders, but an important piece of the revitalization puzzle. To the credit of local Main Street programs, overall revitalization efforts have benefited service businesses, even if they weren't designed for that specific result. This article takes a long overdue look at how we can all do a better job of servicing the service sector and why we should.

The Retail Emphasis

Before we can begin to improve our level of support for service businesses, we need to change our level of appreciation for them. Service businesses are underappreciated not only for their positive contributions to the business mix, but also for their relative health during downtown's decline. The squeaky wheel gets the grease, and the fact is that during the evolution and implementation of the Main Street Four-Point Approach™, retail has been a lot squeakier than service. Look at the four points of the methodology. Promotion gives special attention to retail events and promotions. Economic restructuring focuses on retail market analysis and retail business recruitment. Even Design devotes special attention to the retail storefront. Organization seems to be the only exception, but this may be because we certainly don't want to turn away volunteers and financial support from service businesses.

Is a retail emphasis necessary for successful historic commercial district revitalization? If it is, then we may not want to redirect more volunteer and financial resources to serving the service sector. Retail is often in more obvious need, so it may warrant preferential treatment. However, we must take time to address instances when a retail emphasis results from a Main Street program's belief that retail is more desirable in the commercial corridor than service-based businesses. I have heard many communities over the years attributing the decline of their commercial districts to the shift in their business mix from retail to service. Some actually set goals to create disincentives and barriers for service businesses while creating incentives and shortcuts for retail businesses. However, is the replacement of retail with service businesses the cause of downtown decline, or is it just another symptom? Can a revitalization effort succeed with equal or greater support for service businesses as for retail?

Retail-to-service shifts often result from retail business closings, declining first-floor rents, and a greater realization by service businesses of the importance of ground-level accessibility. It is hard to argue how sweet it was when retail filled all of our first-floor storefronts and service businesses contributed to filling our upper floors. It's equally hard to argue against a service business moving down to the first floor when its employees and customers complain about having to climb stairs, particularly when storefronts sit vacant long enough for rents to drop below what the business used to pay for an upper floor. It is worth noting that in downtown's heyday service businesses were an important part of the business mix, regardless of their location.

Advocates for a retail emphasis make a case that first-floor storefronts need to be retail in order to maintain synergy between businesses and stimulate foot traffic along the street. Without this retail synergy, they argue, window shopping and retail sales will decline. It is definitely true that the street level should remain commercial and that business location in relation to complementary neighbors affects the health of the district. Business clustering – strategically positioning businesses to positively impact foot traffic and sales – is a science perfected by shopping mall managers. However, we should not assume that all service businesses are bad and all retail businesses are good. What makes this an even more timely debate is the fact that shopping malls and lifestyle centers are now strategically recruiting service businesses to complement their business mix.

Location, Location, Location

Much of our emphasis on retail businesses should focus on proper business location and clustering in general. At issue here is not retail versus service, but whether a business needs a high foot-traffic location in order to succeed, and whether that business adds to foot traffic in a way that benefits its neighbors. In a healthy commercial district, businesses that attract recreational shoppers and thrive off impulse buying are clustered where foot traffic is high, regardless of whether they are retail or service.

Businesses that involve more planned or scheduled buying can thrive on accessible upper floors and on secondary streets adjacent to the pedestrian core. Businesses that don't require face-to-face interaction with customers may be better suited on the periphery of the downtown.

It is unlikely that a dentist's office will benefit from being in a high foot-traffic location. People don't just impulsively decide to stop and have their teeth cleaned, partly because appointments are necessary. However, a barbershop or hair salon, also service businesses, could benefit and will often advertise in their windows that walk-ins are welcome. In the case of these and many other service businesses, customer traffic through their front doors throughout the day is high, and customers who patronize these service businesses may stop at others in the district. By managing the physical sequence of storefronts and the business mix, and by strategically clustering all businesses, a revitalization effort can certainly succeed with equal or even greater support for service businesses than retail. This is particularly true if the local Main Street program is basing its decisions on a well-defined market position that includes service businesses.

Service Provider or Retailer...or Both?

When you get right down to it, how do you distinguish a retail business from a service business? You could use a standard industrial classification like NAICS (North American Industry Classification System), but classifications attempt to make a grey subject black and white. Some businesses make all their money on the goods they sell; other businesses make all their money on the services they provide. Many businesses sell goods as well as packaging (and profiting from) value-added services associated with those goods and vice versa.

The line between service and retail continues to blur as more and more retailers are differentiating through experience. In experienced-based retailing, the customer experience becomes the focus, and quality customer service takes on greater importance. For those unfamiliar with the concept, think of hot stores like American Girl Place, Build a Bear Shop, Sephora, and Bass Pro Shops.

"Experiences are how customers act and feel as result of being engaged with your employees, your products, and your physical store. It's taking key in-store activities like selling, merchandising, and collateral and using them to better educate your customer and give them the best possible experience. It's an entire company focused on delivering a "WOW" to the customer. Customers who receive above-market experiences are more likely to purchase, be a loyal customer, and recommend your store to family and friends. You have no better advocate than a customer who receives a great in-store experience."

Doug Fleener, Differentiate Through Experiences: A Case for Experience Based Retail. This article is available for download at www.dynamicexperiences-group.com/DifferentiateThroughExperiences.htm

Service businesses are important not only for their contributions to the business mix and pedestrian traffic, but for their professional expertise and creativity. Members of the "Creative Class" can be found within the service sector and their creativity is an asset to the local business community as a source of great entrepreneurs. The Creative Class is also

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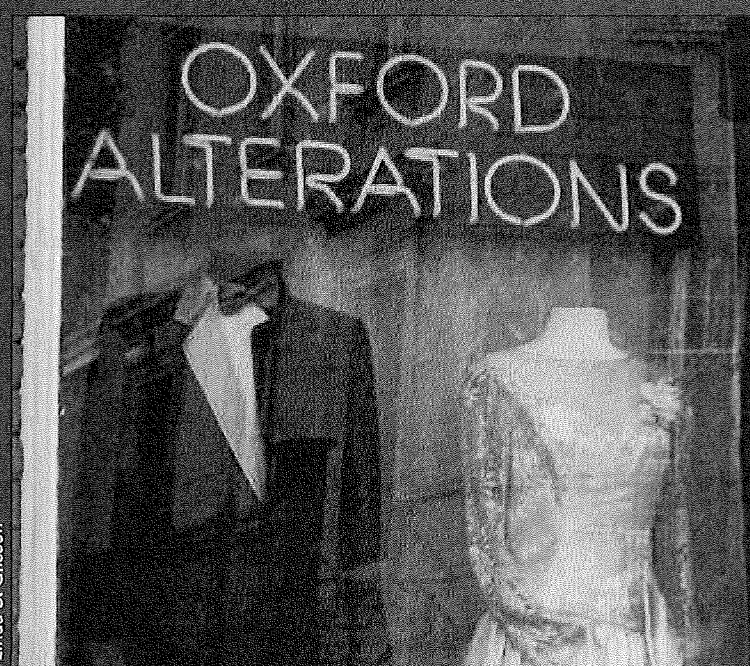
Business location should depend more on whether the operation generates a high volume of foot traffic than whether it's a retail or service business. In general, shoe repair shops and tailors might better be located on side streets because they don't attract impulsive walk-in customers, unlike barbershops or hair salons (opposite page).



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attracted to the lifestyle, social interaction, diversity, authenticity, identity, and quality of place of downtowns and neighborhood business districts so they may be more likely to live and work in Main Street and perhaps even volunteer.

The closer people are to a business, the easier it is for that business to capture them as a customer. Downtown workers employed in service businesses are downtown customers just waiting to happen. Because the service sector is one of the fastest-growing employment categories in the country, it offers a stable and growing base upon which to build our downtown economies. If that's not enough, if Main Street programs want financial and emotional support from service businesses, then they should be prepared to offer them something more direct in return.

Helping the service sector

So how can we better serve the service sector? With a little creative attention, most tried-and-true Main Street activities can be enhanced to better meet the needs of downtown service businesses. These businesses need to be included in our vision, mission, goals, strategies, projects, and in our evaluation of project and program effectiveness. So what do service businesses need? Or more to the point, what new and improved Main Street services will help these valuable businesses?

This question was asked of a focus group of service businesses in Fond du Lac, Wisconsin, during a Main Street resource team visit. Four themes surfaced.

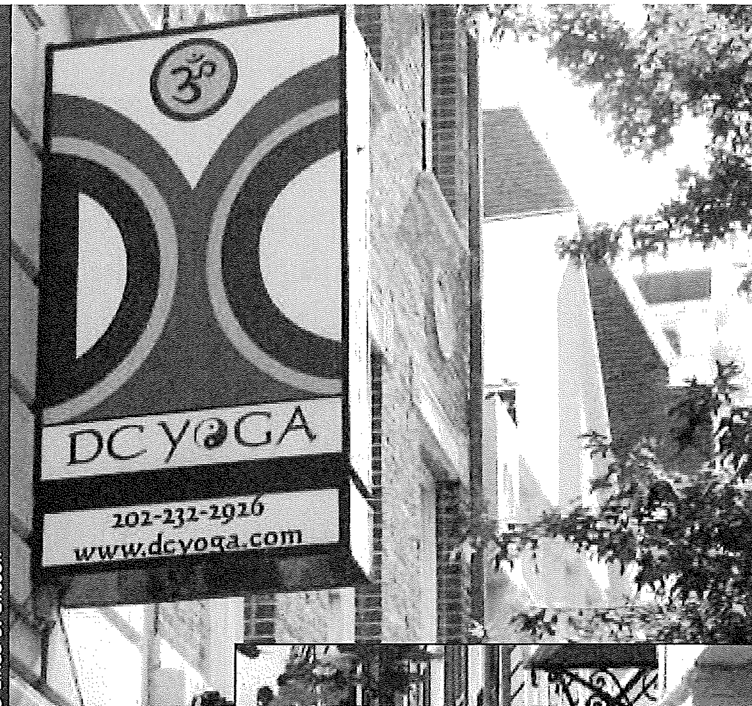
Service businesses need help:

- reaching customers;
- connecting with complementary businesses;
- improving their business operations; and
- improving their physical environs.

All four of these needs appear to be equally important to retail businesses. Even more interesting is how they mirror the four points. However, while the goals may be the same, the strategies that will be effective in achieving these goals will be different for service and retail simply because the two business strategies are different. All local Main Street programs should consider hosting similar focus groups with representative members of their district service businesses.

Let's go back to the black-and-white distinction between retail and service discussed earlier. Business owners who sell goods will build their business model around selling the advantages of their goods versus the competition (brand name, quality, price, selection, etc.) and creating loyalty to those goods. Business owners who provide services will build their business model around selling their personal advantages (creativity, expertise, speed, integrity, etc.) versus the competition and creating loyalty to their business.

That's why we often see greater interest by service businesses than retailers in marketing opportunities that simply generate goodwill and positive public relations. The great thing is that most businesses have elements of both goods and services, particularly in districts where retail's competitive edge often lies in customer service. If the revitalization program develops strategies to support both elements, all downtown businesses will have the opportunity to grow and strengthen their market position in two important dimensions.



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Service businesses are important to a commercial district not only for their contributions to the business mix and pedestrian traffic but also for their professional expertise and creativity. They can be a great asset to the revitalization effort as well as to the diversity of the district.

Service Businesses and Main Street's Four Points

Let's explore ways to serve the service sector, and the service element of the retail sector, point by point, starting with the easiest. Organizational strategies to better involve service businesses in the revitalization effort will simply need to package and sell the Main Street program's particular benefits to those businesses. Examples of the types of benefits include:

◆ Organization

Organization committee volunteers could develop a separate public relations and/or membership brochure that markets the revitalization effort and communicates the unique benefits of the Main Street program to service businesses. Future fund-raising campaigns can be more targeted, and should be more successful when combined with specifically designed information pieces. It is as crucial for the organization to build strong relationships with service businesses and local professional associations as it is to build partnerships with retail businesses and merchants associations.

◆ Design

Strategies to help service businesses improve their physical environs will be virtually the same as for retail businesses. Each building's original design and construction will speak to how it can best be maintained, rehabilitated, or restored, regardless of the occupant. This is particularly true for the exterior. A service business that moves into a former retail storefront should not dramatically alter that storefront, even though it may not need window displays to the same extent as a retail business. Quality signs, and thus sign design assistance, are the same for service businesses. Interior design assistance will need to take into account how the space will be used to provide a specific service, but the interior design of retail space use also changes dramatically from one retail business type to another. For either service or retail use, it remains important to preserve and maintain historic interior elements.

◆ Economic Restructuring

Strategies to help service businesses improve their operations will need to adjust to the way these businesses differ from retail operations. Economic restructuring committee volunteers will need to put conscious thought into the role of service businesses in the district's market position. When determining the downtown trade area and target markets, they will need to verify if that trade area or those target markets are different for service versus retail businesses. Business mix and cluster analyses can be used to identify service strengths, including legal, medical, insurance, financial, beauty, restaurants, and entertainment.

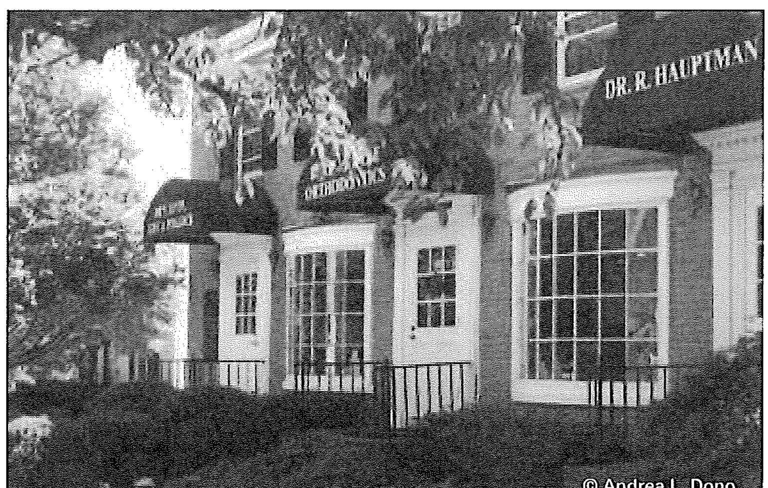
Economic restructuring committees often facilitate networking events. Those exchanges may be more fruitful if they alternate focusing on goods/retail and service. Business retention and expansion programs need to include business improvement projects that meet the unique operational issues and best practices of service businesses. Efforts to fill vacant storefronts need to target service businesses that fit the market position and contribute positively to a business cluster.

◆ Promotion

This is the area where we will probably see the greatest opportunity for differentiating and creating new ways to support service businesses by helping them reach customers and connect with complementary businesses. Promotion is typically subdivided into the three related activities of image campaigns, special events, and retail promotions. Image-building campaigns will need to convey the quality and importance of service businesses to Main Street.

Special events give people a reason to visit downtown and come away with a positive experience. That experience can have future benefits for downtown businesses, but how can each business best take advantage? Business owners need to look at special events as opportunities for personal contact with potential customers, the best kind of advertising. For retail businesses, special events often lead to future sales if attendees have a positive experience admiring window displays, browsing open shops, and chatting with friendly staff. But is the same true for service businesses?

Service businesses may benefit more by the positive public relations and goodwill that can come from sponsoring elements of a special event, but only if there is a good match between the business and the element and if the sponsorship is visible. Businesses should demand and Main Street programs should provide clear sponsorship benefits such as event naming rights, the business name and logo in all event print ads, the business name and logo in signage at the event, the business name mentioned during radio ads and in announcements at the event, and an opportunity for a representative to say a few words at the event.



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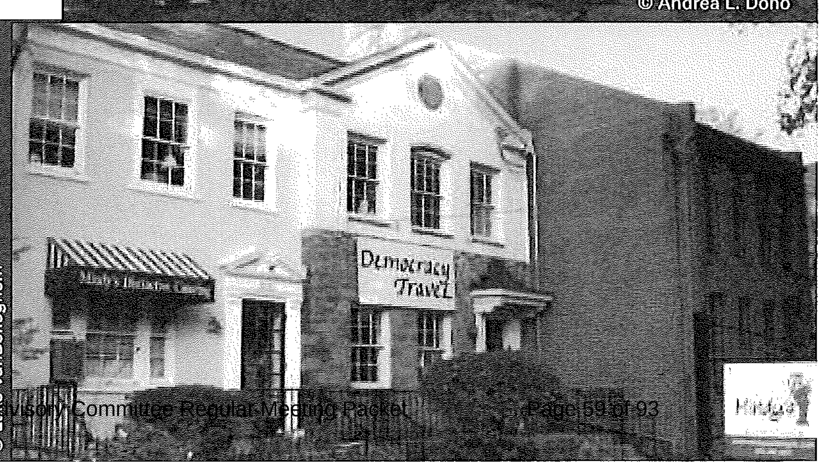
Main Street promotional strategies should target service as well as retail businesses. Cooperative advertising, for example, could market a cluster of service businesses, while events could be designed to connect residents to health care and other services.



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BUSINESS PROMOTIONS

The category of retail promotions clearly needs to be either updated and renamed "business promotions," or a new category of service promotions needs to be added. Defining these promotions by the fact that they ring cash registers on the day of the event is not as beneficial for service as for retail. Directly connecting the consumer with goods and services is the key. All businesses, including service providers, can use promotions to increase their visibility, to have personal interaction with a captive audience, and to access new customers.

Business promotions largely take two forms – advertisements and events. Both work best if they target specific consumer markets, which we learned may be different for service and retail businesses. Both also work best if they feature a business cluster: businesses selling similar goods and services, businesses selling complementary goods and services, and businesses selling to the same consumer group, rather than all businesses in the district.

Advertising strategies tend to stress group or cooperative advertising. Group ads work best when they creatively market compelling characteristics of a business cluster. An example of cooperative advertising that could work well for your service businesses is a welcome packet or advertising that markets a cluster of service businesses to new residents or employees. Service business directories and service-focused brochures can also be effective.

Event strategies are more interactive and have the potential to educate customers and showcase service businesses at the same time. An example of a service business event is a self-improvement or "Healthy Living" event or seminar series that connects residents to businesses such as a hospital, health care professionals, gyms, dance studios, recreation department, farmers' market, restaurants, spas, salons, and barbers.

In a similar way, an "Investing in Our Community" event or seminar could connect residents to attorneys, realtors, insurance agencies, banks, and financial consultants. The lifestyle section of your local newspaper may be a great place for feature stories on "Healthy Living" and "Investing in Our Community" where residents can read about the issues and learn about local business that provide the services.

This article by no means includes every possible way your Main Street organization can better support the service sector in your historic commercial district. It is meant as a challenge to reevaluate your approach to service businesses and as encouragement to apply tried-and-true Main Street principles to the unique needs of service businesses. The service sector has a lot to offer a Main Street district so it should be included in the revitalization strategy. By conducting business surveys and focus groups to find out their unique needs and then reworking elements of your annual action plans, you can help these businesses live up to their full potential as downtown assets. (For more information on developing a survey for capturing information from your service businesses, see Q&A: Service Business Surveys, *Main Street News*, March 1993, Issue 87, pages 6-7.)

Todd Barman is a program officer with the National Trust Main Street Center (NTMSC) where he delivers technical services and training to state and local partners. Before coming to the National Trust, Todd served as assistant coordinator of the Wisconsin Main Street Program for five years. He began his Main Street career as manager of Darlington Community Revitalization, Inc., in Darlington, Wisconsin. Sheri Stuart is currently the assistant state coordinator with the Washington State Main Street Program. Prior to her current position, Sheri was a program officer with the NTMSC for eight years and the executive director of the Port Townsend Main Street Program.

What You Can Do

Looking for inspiration? These Main Street programs have already blazed the trail in including their service sector in the revitalization efforts:

- The Columbia Special Business District in Columbia, Missouri, has developed a website that does an excellent job of cooperatively advertising service business clusters. [www.discoverthedistrict.com/services.html]

- Pittsburgh branded and cooperatively markets the 16:62 Design Zone, an interior design district. This service business cluster is featured on a great website funded by the Pittsburgh Partnership for Neighborhood Development and the Urban Redevelopment Authority of Pittsburgh's citywide Mainstreet Program. To learn more about this program, see "Building the Buzz," *Main Street News*, January 2005, pgs. 14-17. [www.1662designzone.com]

- The Union Square Farmer's Market in the Somerville Main Street district in Massachusetts added "Paws at the Market" to showcase pet health service and product providers at the weekly market. A specialty pet collar maker who operates an eBay store and local dog-rescue groups are among the vendors featured.

- The annual Bel-"Hair" Back-to-School Festival in Baltimore's Belair-Edison Neighborhood features local hair salons that put on an incredible hairstyle show to model the latest fall fashions and showcase this important service business cluster. School supplies are given away to participating schools.

- The "Rock the City" style show in Boston incorporates themed components with a sampling of products and services related to each. Included are fashion, furniture, and fitness.

- Main Street Bath has just put together a proposal for a mini "expo" as a way to boost sales and help make connections between the retail and service businesses in Bath, Maine. Service providers such as insurance companies who work with business, banks, the city codes enforcer, and others will set up an informational session so shop owners can come in and ask the questions they just don't have the time to ask while in their shops – questions about loans, credit card machines, e-commerce, and the list goes on.

- Culpeper Renaissance, Inc., in Virginia publishes two business directories, one for retailers and restaurants and the other for in-town services. Since the office receives numerous calls about what is available downtown, the program has put it all on paper and on the web for easy searching. The covers are professionally printed but the continually changing listing inside is produce in-house so both directories are current. All directories are distributed at all downtown businesses, at the chamber of commerce, nearby rest stops, and high-traffic tourist spots.

Berryville Main Street

Downtown Development Planning Service 2016

Berryville, Virginia

Esri Data Attachment

Prepared by
Todd Barman, Principal Member

BARMAN
Development Strategies, LLC

308 South Monroe Street
Stoughton, WI 53589
todd_barman@charter.net

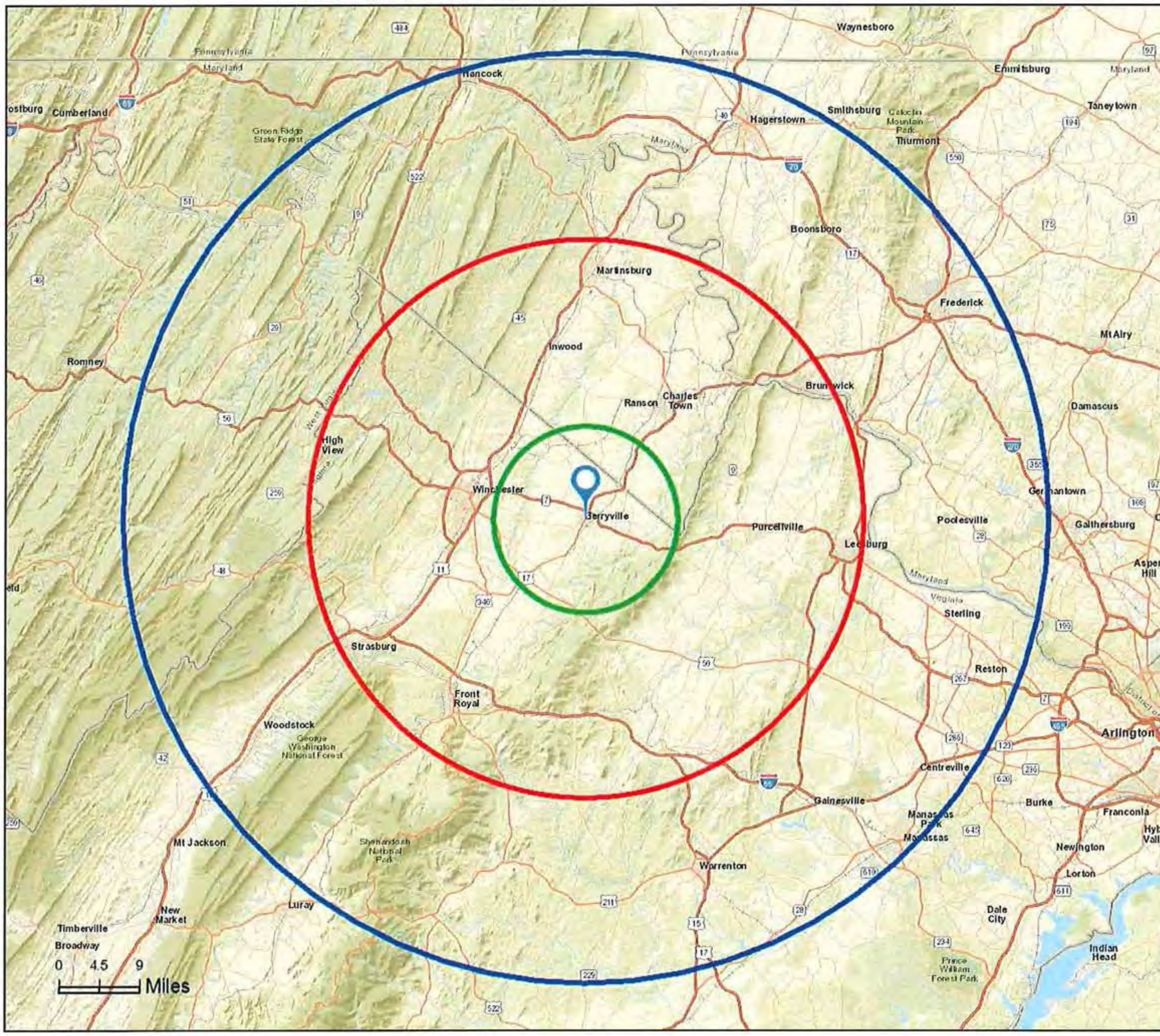
Prepared for

VIRGINIA MAIN Street
VIRGINIA DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT

Site Map

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Rings: 8, 24, 40 mile radii

Latitude: 39.1507
Longitude: -77.9806



September 12, 2016

Market Profile

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Rings: 8, 24, 40 mile radii

Latitude: 39.1507
Longitude: -77.9806

	8 mile	24 mile	40 mile
Population Summary			
2000 Total Population	20,892	302,044	1,271,892
2010 Total Population	25,565	392,775	1,702,830
2016 Total Population	27,683	426,812	1,873,099
2016 Group Quarters	212	5,938	20,398
2021 Total Population	29,984	467,752	2,034,652
2016-2021 Annual Rate	1.61%	1.85%	1.67%
Household Summary			
2000 Households	7,847	116,020	466,661
2000 Average Household Size	2.64	2.56	2.68
2010 Households	9,388	146,087	612,749
2010 Average Household Size	2.70	2.65	2.75
2016 Households	10,091	157,984	667,937
2016 Average Household Size	2.72	2.66	2.77
2021 Households	10,893	172,571	721,932
2021 Average Household Size	2.73	2.68	2.79
2016-2021 Annual Rate	1.54%	1.78%	1.57%
2010 Families	6,899	103,024	440,948
2010 Average Family Size	3.13	3.12	3.21
2016 Families	7,375	110,570	478,790
2016 Average Family Size	3.16	3.14	3.25
2021 Families	7,938	120,451	516,723
2021 Average Family Size	3.18	3.16	3.27
2016-2021 Annual Rate	1.48%	1.73%	1.54%
Housing Unit Summary			
2000 Housing Units	8,389	124,347	494,754
Owner Occupied Housing Units	74.8%	67.4%	69.3%
Renter Occupied Housing Units	18.7%	25.9%	25.0%
Vacant Housing Units	6.5%	6.7%	5.7%
2010 Housing Units	10,278	160,647	659,259
Owner Occupied Housing Units	72.5%	66.6%	67.8%
Renter Occupied Housing Units	18.8%	24.3%	25.2%
Vacant Housing Units	8.7%	9.1%	7.1%
2016 Housing Units	11,097	173,248	716,784
Owner Occupied Housing Units	71.4%	64.8%	66.5%
Renter Occupied Housing Units	19.5%	26.4%	26.7%
Vacant Housing Units	9.1%	8.8%	6.8%
2021 Housing Units	12,107	191,217	776,313
Owner Occupied Housing Units	70.7%	64.1%	66.5%
Renter Occupied Housing Units	19.3%	26.1%	26.5%
Vacant Housing Units	10.0%	9.8%	7.0%
Median Household Income			
2016	$77,903	$68,992	$90,831
2021	$83,406	$76,996	$101,315
Median Home Value			
2016	$306,267	$267,675	$362,619
2021	$348,443	$298,117	$402,677
Per Capita Income			
2016	$33,599	$33,908	$41,336
2021	$35,871	$36,562	$44,475
Median Age			
2010	40.9	38.4	36.6
2016	41.7	39.4	37.5
2021	42.0	39.9	38.1

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

September 12, 2016

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Market Profile

Downtown Berryville, VA
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	8 mile	24 mile	40 mile
2016 Households by Income			
Household Income Base	10,091	157,984	667,926
<$15,000	6.7%	8.1%	5.8%
$15,000 - $24,999	7.1%	7.8%	5.2%
$25,000 - $34,999	6.8%	8.0%	5.6%
$35,000 - $49,999	10.8%	11.8%	9.1%
$50,000 - $74,999	16.3%	17.5%	15.1%
$75,000 - $99,999	15.1%	13.6%	13.3%
$100,000 - $149,999	23.1%	18.0%	21.1%
$150,000 - $199,999	7.8%	7.5%	11.7%
$200,000+	6.3%	7.8%	13.1%
Average Household Income	$91,161	$90,642	$115,290
2021 Households by Income			
Household Income Base	10,893	172,571	721,921
<$15,000	7.2%	8.3%	6.0%
$15,000 - $24,999	7.2%	8.0%	5.1%
$25,000 - $34,999	6.1%	6.8%	4.8%
$35,000 - $49,999	12.7%	12.4%	9.2%
$50,000 - $74,999	10.8%	13.0%	10.5%
$75,000 - $99,999	15.0%	14.2%	13.4%
$100,000 - $149,999	24.7%	19.7%	23.0%
$150,000 - $199,999	9.4%	8.9%	13.8%
$200,000+	7.1%	8.7%	14.2%
Average Household Income	$97,633	$98,219	$124,753
2016 Owner Occupied Housing Units by Value			
Total	7,923	112,194	476,623
<$50,000	7.5%	5.6%	3.3%
$50,000 - $99,999	2.2%	4.8%	2.8%
$100,000 - $149,999	4.4%	9.2%	5.4%
$150,000 - $199,999	10.5%	13.8%	8.7%
$200,000 - $249,999	11.9%	12.9%	9.6%
$250,000 - $299,999	12.1%	10.4%	9.3%
$300,000 - $399,999	23.3%	15.0%	17.4%
$400,000 - $499,999	10.8%	9.5%	13.1%
$500,000 - $749,999	10.4%	9.9%	18.2%
$750,000 - $999,999	3.0%	5.3%	8.4%
$1,000,000 +	4.1%	3.5%	3.8%
Average Home Value	$358,823	$345,982	$426,655
2021 Owner Occupied Housing Units by Value			
Total	8,561	122,655	516,396
<$50,000	8.4%	4.5%	2.4%
$50,000 - $99,999	3.3%	5.1%	3.0%
$100,000 - $149,999	5.9%	9.6%	5.7%
$150,000 - $199,999	8.5%	12.2%	6.7%
$200,000 - $249,999	4.8%	10.6%	6.7%
$250,000 - $299,999	7.4%	8.4%	6.7%
$300,000 - $399,999	24.0%	15.2%	18.3%
$400,000 - $499,999	15.7%	12.8%	17.1%
$500,000 - $749,999	13.1%	11.4%	19.9%
$750,000 - $999,999	4.1%	6.4%	9.4%
$1,000,000 +	4.7%	3.9%	4.0%
Average Home Value	$389,274	$371,427	$453,354

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

September 12, 2016

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Rings: 8, 24, 40 mile radii

Latitude: 39.1507
Longitude: -77.9806

	8 mile	24 mile	40 mile
2010 Population by Age			
Total	25,565	392,777	1,702,831
0 - 4	6.2%	6.7%	7.3%
5 - 9	7.2%	7.2%	7.5%
10 - 14	7.7%	7.2%	7.3%
15 - 24	11.1%	12.5%	11.7%
25 - 34	9.9%	11.8%	13.8%
35 - 44	14.4%	14.6%	16.0%
45 - 54	17.4%	16.2%	15.9%
55 - 64	12.7%	12.1%	11.0%
65 - 74	7.6%	6.8%	5.7%
75 - 84	4.2%	3.6%	2.8%
85 +	1.5%	1.3%	1.1%
18 +	74.2%	74.5%	73.7%
2016 Population by Age			
Total	27,683	426,812	1,873,099
0 - 4	5.8%	6.2%	6.7%
5 - 9	6.7%	6.8%	7.3%
10 - 14	7.4%	7.2%	7.4%
15 - 24	11.2%	12.3%	11.7%
25 - 34	10.4%	12.1%	13.1%
35 - 44	13.0%	13.2%	14.9%
45 - 54	15.1%	15.0%	14.9%
55 - 64	14.2%	13.3%	12.2%
65 - 74	9.8%	8.7%	7.4%
75 - 84	4.6%	3.9%	3.1%
85 +	1.7%	1.5%	1.2%
18 +	75.9%	75.9%	74.6%
2021 Population by Age			
Total	29,984	467,752	2,034,650
0 - 4	5.7%	6.0%	6.6%
5 - 9	6.4%	6.5%	6.9%
10 - 14	7.2%	7.0%	7.2%
15 - 24	10.4%	11.8%	11.2%
25 - 34	10.8%	12.3%	13.3%
35 - 44	13.4%	13.2%	14.9%
45 - 54	13.0%	13.4%	13.7%
55 - 64	14.6%	13.6%	12.4%
65 - 74	11.1%	9.9%	8.6%
75 - 84	5.4%	4.7%	3.8%
85 +	1.9%	1.6%	1.3%
18 +	76.6%	76.4%	75.2%
2010 Population by Sex			
Males	12,612	194,338	844,285
Females	12,953	198,437	858,545
2016 Population by Sex			
Males	13,627	211,045	928,196
Females	14,056	215,767	944,903
2021 Population by Sex			
Males	14,788	231,284	1,007,730
Females	15,196	236,468	1,026,922

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

September 12, 2016

Market Profile

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Rings: 8, 24, 40 mile radii

Latitude: 39.1507
Longitude: -77.9806

	8 mile	24 mile	40 mile
2010 Population by Race/Ethnicity			
Total	25,566	392,776	1,702,830
White Alone	89.3%	86.2%	73.2%
Black Alone	5.2%	6.4%	8.7%
American Indian Alone	0.3%	0.3%	0.3%
Asian Alone	1.3%	1.8%	10.0%
Pacific Islander Alone	0.1%	0.0%	0.1%
Some Other Race Alone	1.8%	2.8%	4.3%
Two or More Races	2.1%	2.6%	3.5%
Hispanic Origin	4.9%	6.8%	10.7%
Diversity Index	27.4	34.8	55.3
2016 Population by Race/Ethnicity			
Total	27,684	426,813	1,873,099
White Alone	87.6%	84.2%	69.5%
Black Alone	5.2%	6.6%	9.2%
American Indian Alone	0.3%	0.3%	0.3%
Asian Alone	1.8%	2.4%	11.8%
Pacific Islander Alone	0.1%	0.1%	0.1%
Some Other Race Alone	2.3%	3.4%	5.0%
Two or More Races	2.8%	3.1%	4.1%
Hispanic Origin	6.4%	8.3%	12.6%
Diversity Index	32.1	39.5	60.6
2021 Population by Race/Ethnicity			
Total	29,985	467,751	2,034,652
White Alone	86.0%	82.2%	66.4%
Black Alone	5.2%	6.9%	9.5%
American Indian Alone	0.3%	0.3%	0.4%
Asian Alone	2.3%	3.0%	13.4%
Pacific Islander Alone	0.1%	0.1%	0.1%
Some Other Race Alone	2.8%	3.9%	5.6%
Two or More Races	3.3%	3.7%	4.6%
Hispanic Origin	7.7%	9.7%	14.2%
Diversity Index	36.3	43.8	64.6
2010 Population by Relationship and Household Type			
Total	25,565	392,775	1,702,830
In Households	99.2%	98.5%	98.8%
In Family Households	86.7%	84.5%	85.8%
Householder	27.1%	26.2%	25.9%
Spouse	22.0%	20.5%	20.7%
Child	32.3%	31.7%	32.3%
Other relative	3.1%	3.4%	4.3%
Nonrelative	2.2%	2.7%	2.6%
In Nonfamily Households	12.4%	14.0%	13.0%
In Group Quarters	0.8%	1.5%	1.2%
Institutionalized Population	0.7%	0.7%	0.9%
Noninstitutionalized Population	0.2%	0.8%	0.3%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ ethnic groups.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

September 12, 2016

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Market Profile

Downtown Berryville, VA
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	8 mile	24 mile	40 mile
2016 Population 25+ by Educational Attainment			
Total	19,072	288,505	1,251,647
Less than 9th Grade	3.6%	4.5%	3.7%
9th - 12th Grade, No Diploma	6.5%	6.8%	4.9%
High School Graduate	20.6%	24.7%	18.8%
GED/Alternative Credential	5.7%	5.2%	2.9%
Some College, No Degree	22.1%	19.4%	17.6%
Associate Degree	8.0%	7.2%	6.8%
Bachelor's Degree	20.2%	19.5%	25.8%
Graduate/Professional Degree	13.3%	12.6%	19.4%
2016 Population 15+ by Marital Status			
Total	22,160	340,963	1,470,975
Never Married	23.6%	27.4%	28.6%
Married	60.5%	55.9%	57.5%
Widowed	5.6%	5.3%	4.4%
Divorced	10.4%	11.4%	9.4%
2016 Civilian Population 16+ in Labor Force			
Civilian Employed	95.6%	95.2%	96.0%
Civilian Unemployed	4.4%	4.8%	4.0%
2016 Employed Population 16+ by Industry			
Total	13,758	209,280	967,684
Agriculture/Mining	2.4%	1.6%	0.8%
Construction	9.2%	7.5%	6.7%
Manufacturing	6.9%	7.3%	5.3%
Wholesale Trade	1.6%	2.0%	1.8%
Retail Trade	8.5%	11.0%	9.9%
Transportation/Utilities	5.8%	5.0%	4.2%
Information	2.3%	2.0%	2.6%
Finance/Insurance/Real Estate	5.1%	5.2%	6.4%
Services	48.0%	49.4%	53.1%
Public Administration	10.1%	9.0%	9.3%
2016 Employed Population 16+ by Occupation			
Total	13,758	209,278	967,684
White Collar	67.4%	62.0%	69.7%
Management/Business/Financial	19.8%	17.1%	20.9%
Professional	25.8%	23.4%	27.8%
Sales	8.6%	9.5%	9.4%
Administrative Support	13.3%	12.0%	11.6%
Services	13.6%	17.6%	15.2%
Blue Collar	19.0%	20.4%	15.0%
Farming/Forestry/Fishing	0.7%	0.5%	0.3%
Construction/Extraction	6.5%	5.4%	4.4%
Installation/Maintenance/Repair	2.6%	3.5%	2.6%
Production	3.3%	4.2%	2.9%
Transportation/Material Moving	5.8%	6.9%	4.8%
2010 Population By Urban/ Rural Status			
Total Population	25,565	392,775	1,702,830
Population Inside Urbanized Area	35.2%	40.5%	74.1%
Population Inside Urbanized Cluster	17.5%	19.7%	5.3%
Rural Population	47.3%	39.8%	20.5%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

September 12, 2016

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24 East Main Street Berryville VA 22611
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	8 mile	24 mile	40 mile
2010 Households by Type			
Total	9,388	146,086	612,748
Households with 1 Person	20.8%	23.1%	21.8%
Households with 2+ People	79.2%	76.9%	78.2%
Family Households	73.5%	70.5%	72.0%
Husband-wife Families	59.6%	55.1%	57.6%
With Related Children	28.0%	25.9%	29.7%
Other Family (No Spouse Present)	13.8%	15.4%	14.4%
Other Family with Male Householder	4.6%	4.8%	4.3%
With Related Children	2.8%	3.0%	2.5%
Other Family with Female Householder	9.3%	10.6%	10.0%
With Related Children	5.7%	6.9%	6.6%
Nonfamily Households	5.7%	6.4%	6.2%
All Households with Children	37.0%	36.4%	39.3%
Multigenerational Households	4.3%	4.1%	4.2%
Unmarried Partner Households	6.3%	7.3%	6.0%
Male-female	5.7%	6.5%	5.3%
Same-sex	0.6%	0.7%	0.7%
2010 Households by Size			
Total	9,386	146,088	612,748
1 Person Household	20.8%	23.1%	21.8%
2 Person Household	35.1%	33.7%	31.5%
3 Person Household	17.3%	17.0%	17.8%
4 Person Household	15.7%	14.9%	16.6%
5 Person Household	6.6%	7.0%	7.5%
6 Person Household	2.8%	2.7%	2.9%
7 + Person Household	1.7%	1.6%	1.9%
2010 Households by Tenure and Mortgage Status			
Total	9,388	146,088	612,749
Owner Occupied	79.4%	73.2%	72.9%
Owned with a Mortgage/Loan	60.4%	56.6%	60.8%
Owned Free and Clear	19.0%	16.6%	12.2%
Renter Occupied	20.6%	26.8%	27.1%
2010 Housing Units By Urban/ Rural Status			
Total Housing Units	10,278	160,647	659,259
Housing Units Inside Urbanized Area	30.6%	40.4%	71.8%
Housing Units Inside Urbanized Cluster	18.6%	19.1%	5.5%
Rural Housing Units	50.8%	40.5%	22.6%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

September 12, 2016

Market Profile

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Rings: 8, 24, 40 mile radii

Latitude: 39.1507
Longitude: -77.9806

	8 mile	24 mile	40 mile
Top 3 Tapestry Segments			
1.	Comfortable Empty Nesters	Middleburg (4C)	Enterprising Professionals
2.	Green Acres (6A)	Soccer Moms (4A)	Boomburbs (1C)
3.	Boomburbs (1C)	Green Acres (6A)	Professional Pride (1B)
2016 Consumer Spending			
Apparel & Services: Total $	$23,245,644	$369,624,486	$1,997,422,422
Average Spent	$2,303.60	$2,339.63	$2,990.44
Spending Potential Index	114	116	149
Education: Total $	$16,780,780	$261,327,956	$1,454,362,345
Average Spent	$1,662.95	$1,654.14	$2,177.39
Spending Potential Index	118	117	154
Entertainment/Recreation: Total $	$34,640,136	$540,328,148	$2,884,663,695
Average Spent	$3,432.78	$3,420.14	$4,318.77
Spending Potential Index	118	117	148
Food at Home: Total $	$56,635,322	$902,608,630	$4,759,908,836
Average Spent	$5,612.46	$5,713.29	$7,126.28
Spending Potential Index	113	115	143
Food Away from Home: Total $	$35,807,466	$570,536,910	$3,066,213,839
Average Spent	$3,548.46	$3,611.36	$4,590.57
Spending Potential Index	115	117	148
Health Care: Total $	$63,576,636	$975,535,683	$5,076,981,642
Average Spent	$6,300.33	$6,174.90	$7,600.99
Spending Potential Index	119	117	143
HH Furnishings & Equipment: Total $	$21,153,610	$329,436,790	$1,764,056,979
Average Spent	$2,096.28	$2,085.25	$2,641.05
Spending Potential Index	119	118	150
Personal Care Products & Services: Total $	$8,611,012	$135,267,289	$727,178,822
Average Spent	$853.34	$856.21	$1,088.69
Spending Potential Index	116	117	149
Shelter: Total $	$180,745,220	$2,860,863,118	$15,511,688,699
Average Spent	$17,911.53	$18,108.56	$23,223.28
Spending Potential Index	115	116	149
Support Payments/Cash Contributions/Gifts in Kind: Total $	$28,311,961	$432,881,707	$2,280,366,105
Average Spent	$2,805.66	$2,740.04	$3,414.04
Spending Potential Index	121	118	147
Travel: Total $	$23,272,348	$352,654,607	$1,924,621,912
Average Spent	$2,306.25	$2,232.22	$2,881.44
Spending Potential Index	124	120	155
Vehicle Maintenance & Repairs: Total $	$12,181,692	$190,356,777	$1,005,913,611
Average Spent	$1,207.18	$1,204.91	$1,506.00
Spending Potential Index	117	116	145

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.
Source: Consumer Spending data are derived from the 2013 and 2014 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

September 12, 2016

Tapestry Segmentation Area Profile

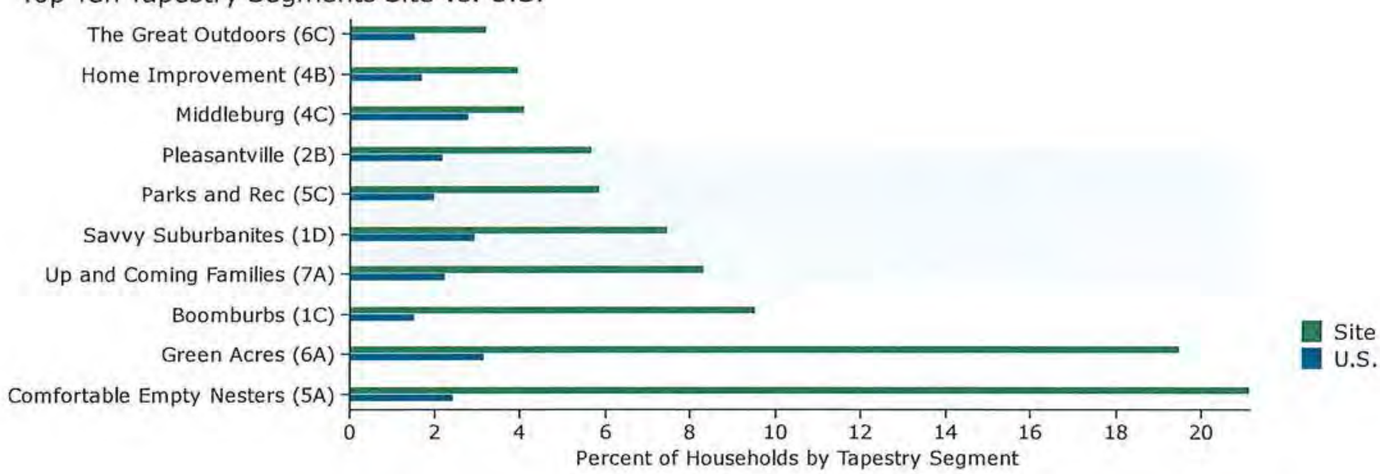
Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 8 mile radius

Latitude: 39.1507
Longitude: -77.9806

Top Twenty Tapestry Segments

		2016 Households		2016 U.S. Households		
			Cumulative		Cumulative	
Rank	**Tapestry Segment**	**Percent**	**Percent**	**Percent**	**Percent**	**Index**
1	Comfortable Empty Nesters (5A)	21.1%	21.1%	2.5%	2.5%	858
2	Green Acres (6A)	19.5%	40.6%	3.2%	5.7%	610
3	Boomburbs (1C)	9.5%	50.1%	1.5%	7.2%	618
4	Up and Coming Families (7A)	8.4%	58.5%	2.3%	9.5%	366
5	Savvy Suburbanites (1D)	7.5%	66.0%	3.0%	12.5%	251
	Subtotal	**66.0%**		**12.5%**		
6	Parks and Rec (5C)	5.9%	71.9%	2.0%	14.5%	293
7	Pleasantville (2B)	5.7%	77.6%	2.2%	16.7%	257
8	Middleburg (4C)	4.1%	81.7%	2.8%	19.5%	145
9	Home Improvement (4B)	4.0%	85.7%	1.7%	21.2%	232
10	The Great Outdoors (6C)	3.2%	88.9%	1.6%	22.8%	208
	Subtotal	**22.9%**		**10.3%**		
11	Small Town Simplicity (12C)	3.2%	92.1%	1.9%	24.7%	168
12	Southern Satellites (10A)	2.9%	95.0%	3.2%	27.9%	92
13	Salt of the Earth (6B)	2.8%	97.8%	2.9%	30.8%	96
14	Bright Young Professionals (8C)	1.0%	98.8%	2.2%	33.0%	45
15	Soccer Moms (4A)	0.9%	99.7%	2.8%	35.8%	33
	Subtotal	**10.8%**		**13.0%**		
16	Down the Road (10D)	0.3%	100.0%	1.1%	36.9%	24
	Subtotal	**0.3%**		**1.1%**		
	Total	**100.0%**		**37.0%**		**270**

Top Ten Tapestry Segments Site vs. U.S.

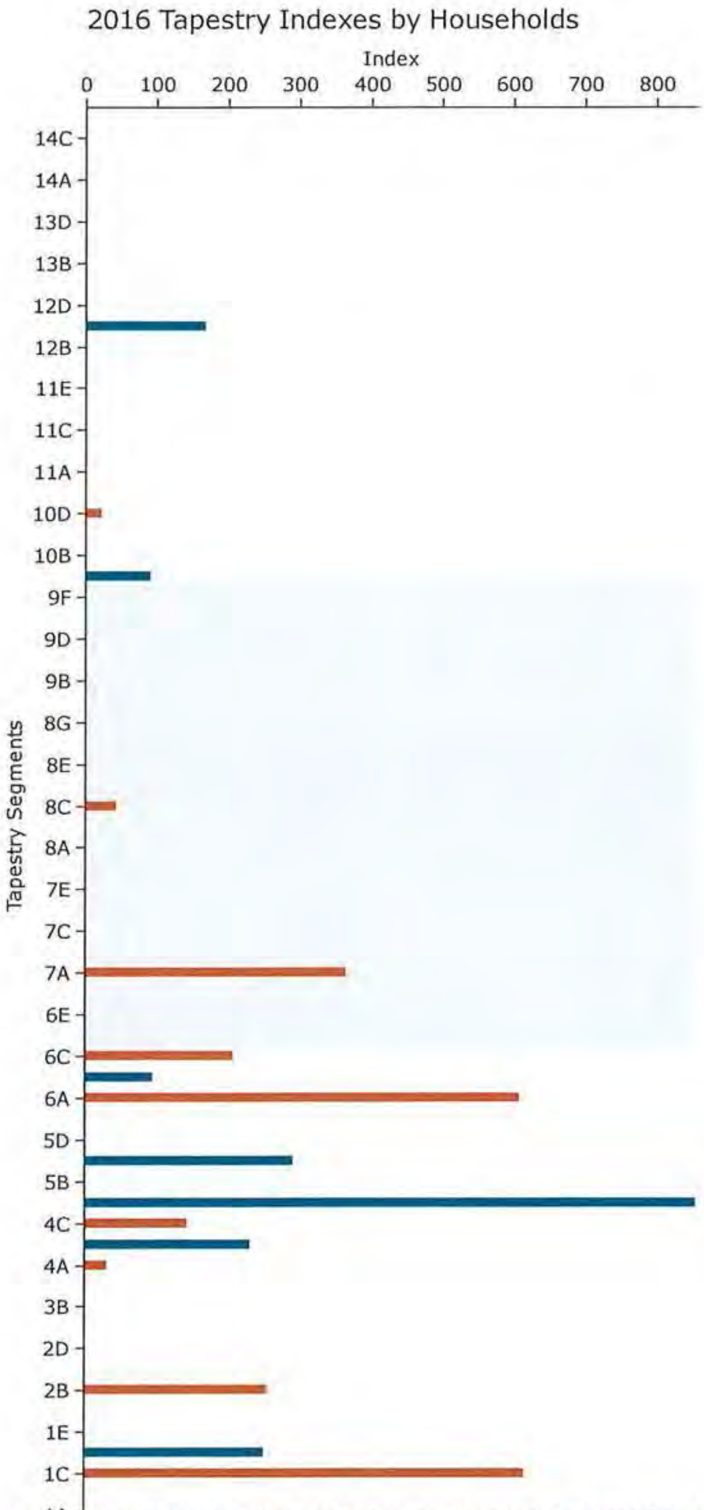


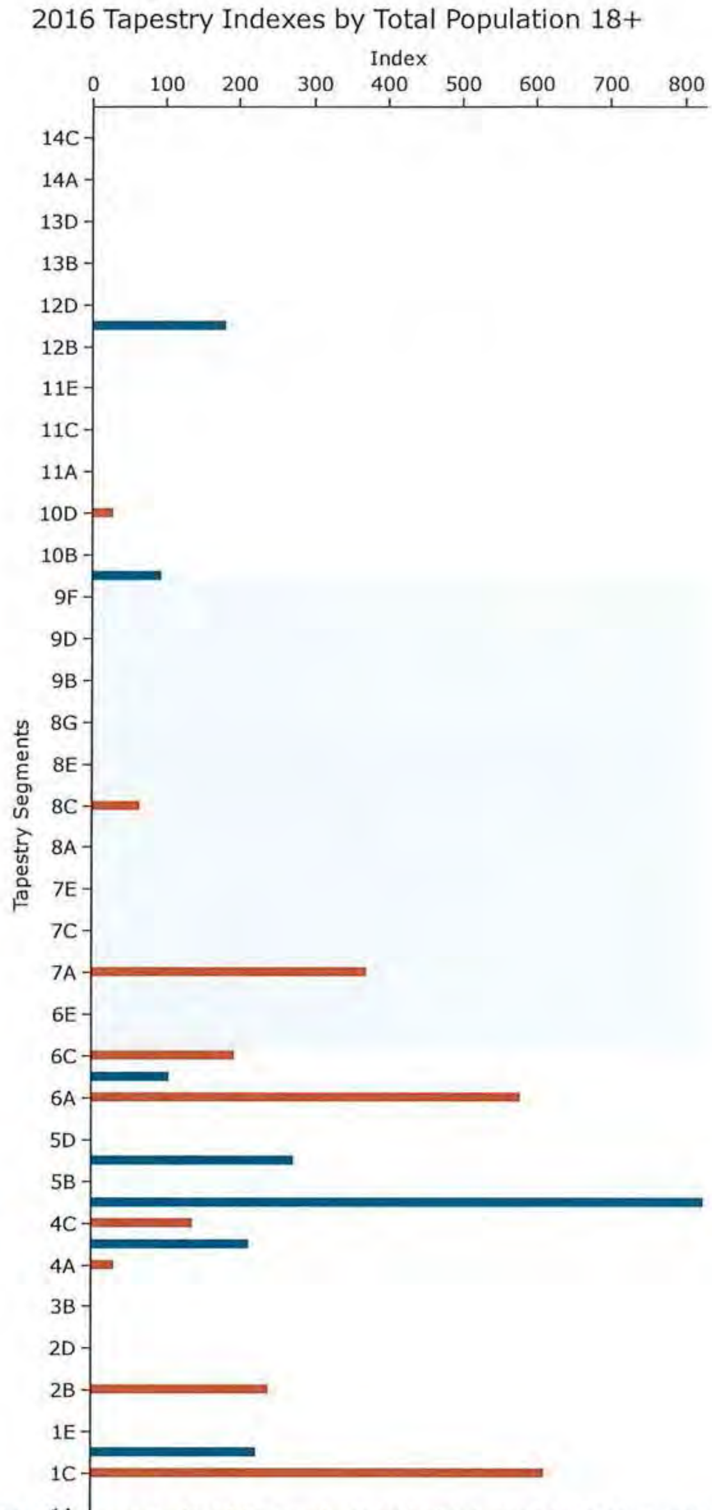
Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

September 12, 2016

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 8 mile radius

Latitude: 39.1507
Longitude: -77.9806





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Source: Esri

September 12, 2016

Tapestry Segmentation Area Profile

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 8 mile radius

Latitude: 39.1507
Longitude: -77.9806

Tapestry LifeMode Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	10,091	100.0%		21,014	100.0%	
1. Affluent Estates	**1,717**	**17.0%**	**172**	**3,628**	**17.3%**	**166**
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	0	0.0%	0	0	0.0%	0
Boomburbs (1C)	963	9.5%	618	2,110	10.0%	614
Savvy Suburbanites (1D)	754	7.5%	251	1,518	7.2%	226
Exurbanites (1E)	0	0.0%	0	0	0.0%	0
2. Upscale Avenues	**575**	**5.7%**	**100**	**1,258**	**6.0%**	**101**
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	575	5.7%	257	1,258	6.0%	242
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	0	0.0%	0	0	0.0%	0
3. Uptown Individuals	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
4. Family Landscapes	**910**	**9.0%**	**121**	**1,866**	**8.9%**	**115**
Soccer Moms (4A)	94	0.9%	33	209	1.0%	33
Home Improvement (4B)	402	4.0%	232	837	4.0%	216
Middleburg (4C)	414	4.1%	145	820	3.9%	139
5. GenXurban	**2,727**	**27.0%**	**234**	**5,421**	**25.8%**	**235**
Comfortable Empty Nesters (5A)	2,134	21.1%	858	4,290	20.4%	829
In Style (5B)	0	0.0%	0	0	0.0%	0
Parks and Rec (5C)	593	5.9%	293	1,131	5.4%	275
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
6. Cozy Country Living	**2,576**	**25.5%**	**209**	**5,299**	**25.2%**	**212**
Green Acres (6A)	1,968	19.5%	610	4,025	19.2%	581
Salt of the Earth (6B)	282	2.8%	96	647	3.1%	106
The Great Outdoors (6C)	326	3.2%	208	627	3.0%	196
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
7. Ethnic Enclaves	**843**	**8.4%**	**119**	**1,891**	**9.0%**	**111**
Up and Coming Families (7A)	843	8.4%	366	1,891	9.0%	374
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

September 12, 2016

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 8 mile radius

Latitude: 39.1507
Longitude: -77.9806

Tapestry LifeMode Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	10,091	100.0%		21,014	100.0%	
8. Middle Ground	**100**	**1.0%**	**9**	**284**	**1.4%**	**13**
City Lights (8A)	0	0.0%	0	0	0.0%	0
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Bright Young Professionals (8C)	100	1.0%	45	284	1.4%	67
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	0	0.0%	0	0	0.0%	0
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
9. Senior Styles	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	0	0.0%	0	0	0.0%	0
The Elders (9C)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	0	0.0%	0	0	0.0%	0
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
10. Rustic Outposts	**320**	**3.2%**	**38**	**706**	**3.4%**	**40**
Southern Satellites (10A)	292	2.9%	92	633	3.0%	94
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	28	0.3%	24	73	0.3%	30
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
11. Midtown Singles	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
City Strivers (11A)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	0	0.0%	0	0	0.0%	0
City Commons (11E)	0	0.0%	0	0	0.0%	0
12. Hometown	**323**	**3.2%**	**51**	**661**	**3.1%**	**53**
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	323	3.2%	168	661	3.1%	183
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
13. Next Wave	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
International Marketplace (13A)	0	0.0%	0	0	0.0%	0
Las Casas (13B)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	0	0.0%	0	0	0.0%	0
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
14. Scholars and Patriots	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

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Source: Esri

September 12, 2016

Tapestry Segmentation Area Profile

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 8 mile radius

Latitude: 39.1507
Longitude: -77.9806

Tapestry Urbanization Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	10,091	100.0%		21,014	100.0%	
1. Principal Urban Center	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	0	0.0%	0	0	0.0%	0
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
2. Urban Periphery	**100**	**1.0%**	**6**	**284**	**1.4%**	**8**
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0
City Lights (8A)	0	0.0%	0	0	0.0%	0
Bright Young Professionals (8C)	100	1.0%	45	284	1.4%	67
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
International Marketplace (13A)	0	0.0%	0	0	0.0%	0
Las Casas (13B)	0	0.0%	0	0	0.0%	0
3. Metro Cities	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
In Style (5B)	0	0.0%	0	0	0.0%	0
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	0	0.0%	0	0	0.0%	0
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	0	0.0%	0	0	0.0%	0
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	0	0.0%	0	0	0.0%	0
City Commons (11E)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0

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September 12, 2016

esri

Tapestry Segmentation Area Profile

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 8 mile radius

Latitude: 39.1507
Longitude: -77.9806

Tapestry Urbanization Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	10,091	100.0%		21,014	100.0%	
4. Suburban Periphery	**6,358**	**63.0%**	**198**	**13,244**	**63.0%**	**196**
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	0	0.0%	0	0	0.0%	0
Boomburbs (1C)	963	9.5%	618	2,110	10.0%	614
Savvy Suburbanites (1D)	754	7.5%	251	1,518	7.2%	226
Exurbanites (1E)	0	0.0%	0	0	0.0%	0
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	575	5.7%	257	1,258	6.0%	242
Enterprising Professionals (2D)	0	0.0%	0	0	0.0%	0
Soccer Moms (4A)	94	0.9%	33	209	1.0%	33
Home Improvement (4B)	402	4.0%	232	837	4.0%	216
Comfortable Empty Nesters (5A)	2,134	21.1%	858	4,290	20.4%	829
Parks and Rec (5C)	593	5.9%	293	1,131	5.4%	275
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
Up and Coming Families (7A)	843	8.4%	366	1,891	9.0%	374
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	0	0.0%	0	0	0.0%	0
The Elders (9C)	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
5. Semirural	**765**	**7.6%**	**80**	**1,554**	**7.4%**	**82**
Middleburg (4C)	414	4.1%	145	820	3.9%	139
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	28	0.3%	24	73	0.3%	30
Small Town Simplicity (12C)	323	3.2%	168	661	3.1%	183
6. Rural	**2,868**	**28.4%**	**166**	**5,932**	**28.2%**	**166**
Green Acres (6A)	1,968	19.5%	610	4,025	19.2%	581
Salt of the Earth (6B)	282	2.8%	96	647	3.1%	106
The Great Outdoors (6C)	326	3.2%	208	627	3.0%	196
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	292	2.9%	92	633	3.0%	94
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

September 12, 2016

Tapestry Segmentation Area Profile

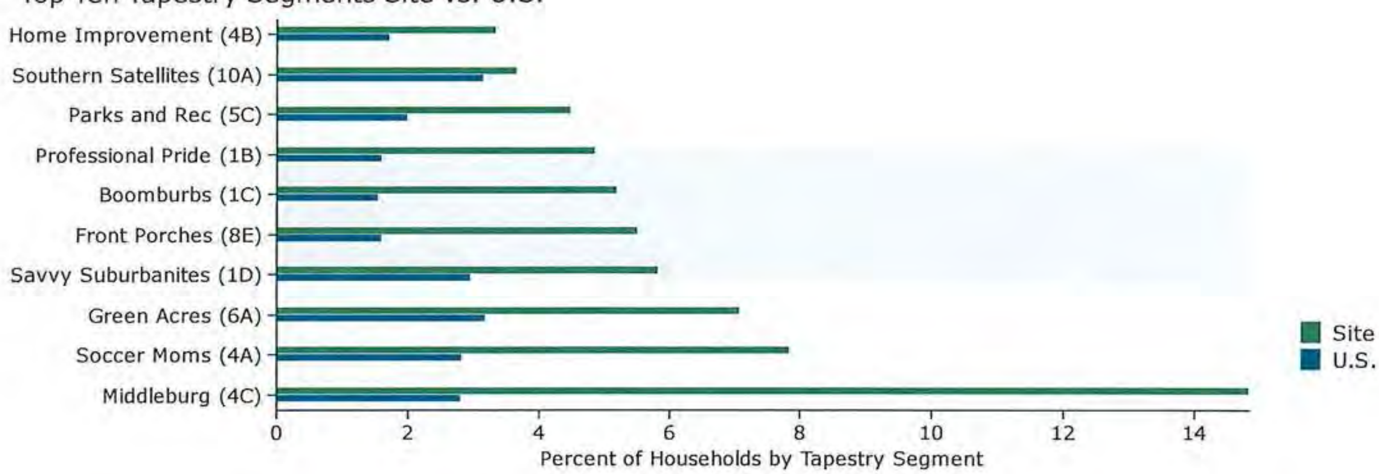
Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 24 mile radius

Latitude: 39.1507
Longitude: -77.9806

Top Twenty Tapestry Segments

		2016 Households		2016 U.S. Households		
			Cumulative		Cumulative	
Rank	**Tapestry Segment**	**Percent**	**Percent**	**Percent**	**Percent**	**Index**
1	Middleburg (4C)	14.8%	14.8%	2.8%	2.8%	524
2	Soccer Moms (4A)	7.9%	22.7%	2.8%	5.6%	276
3	Green Acres (6A)	7.1%	29.8%	3.2%	8.8%	222
4	Savvy Suburbanites (1D)	5.8%	35.6%	3.0%	11.8%	196
5	Front Porches (8E)	5.5%	41.1%	1.6%	13.4%	344
	Subtotal	**41.1%**		**13.4%**		
6	Boomburbs (1C)	5.2%	46.3%	1.5%	14.9%	337
7	Professional Pride (1B)	4.9%	51.2%	1.6%	16.5%	303
8	Parks and Rec (5C)	4.5%	55.7%	2.0%	18.5%	224
9	Southern Satellites (10A)	3.7%	59.4%	3.2%	21.7%	116
10	Home Improvement (4B)	3.3%	62.7%	1.7%	23.4%	195
	Subtotal	**21.6%**		**10.0%**		
11	Comfortable Empty Nesters (5A)	2.7%	65.4%	2.5%	25.9%	109
12	The Great Outdoors (6C)	2.6%	68.0%	1.6%	27.5%	166
13	Bright Young Professionals (8C)	2.5%	70.5%	2.2%	29.7%	114
14	Salt of the Earth (6B)	2.5%	73.0%	2.9%	32.6%	86
15	Exurbanites (1E)	2.1%	75.1%	1.9%	34.5%	110
	Subtotal	**12.4%**		**11.1%**		
16	In Style (5B)	1.8%	76.9%	2.3%	36.8%	81
17	Down the Road (10D)	1.8%	78.7%	1.1%	37.9%	158
18	Enterprising Professionals (2D)	1.8%	80.5%	1.4%	39.3%	127
19	Emerald City (8B)	1.6%	82.1%	1.4%	40.7%	115
20	Small Town Simplicity (12C)	1.6%	83.7%	1.9%	42.6%	82
	Subtotal	**8.6%**		**8.1%**		
	Total	**83.7%**		**42.7%**		**196**

Top Ten Tapestry Segments Site vs. U.S.



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

September 12, 2016

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 24 mile radius

Latitude: 39.1507
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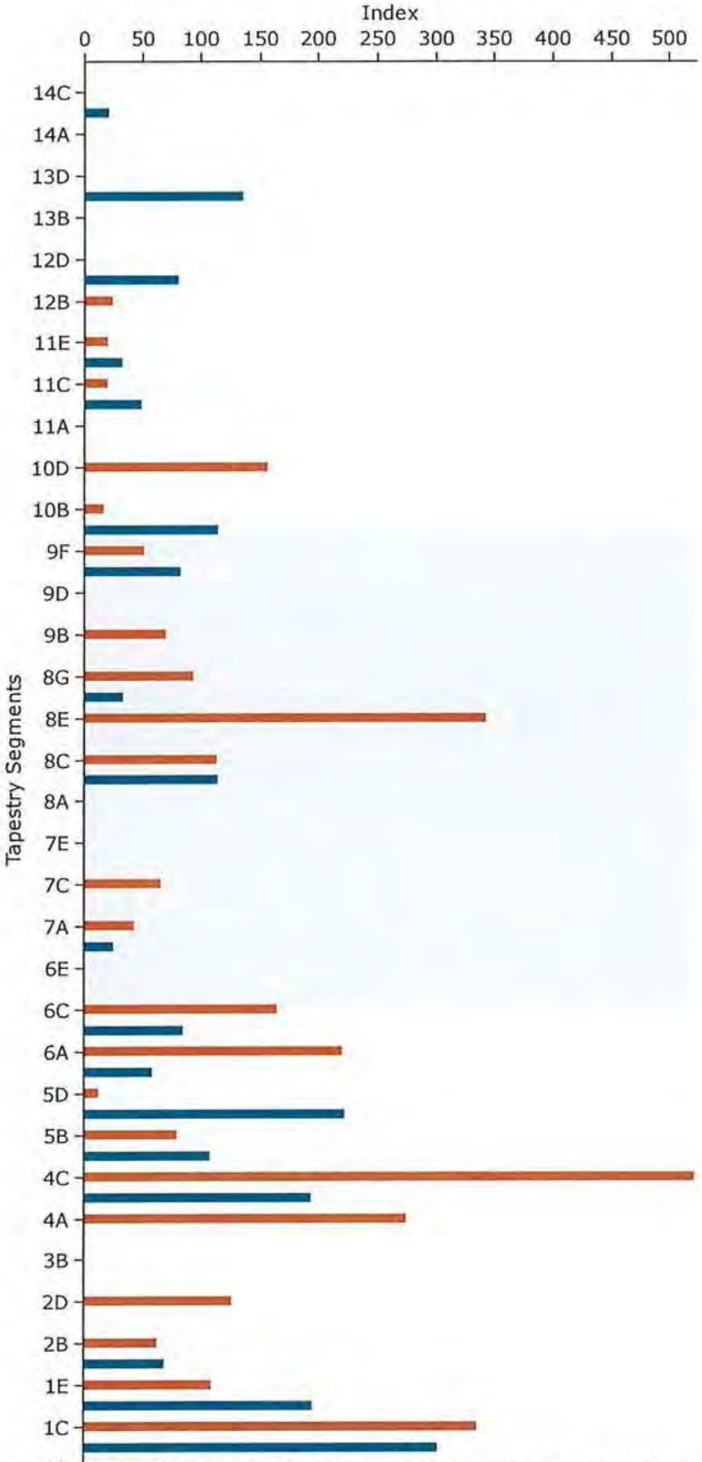
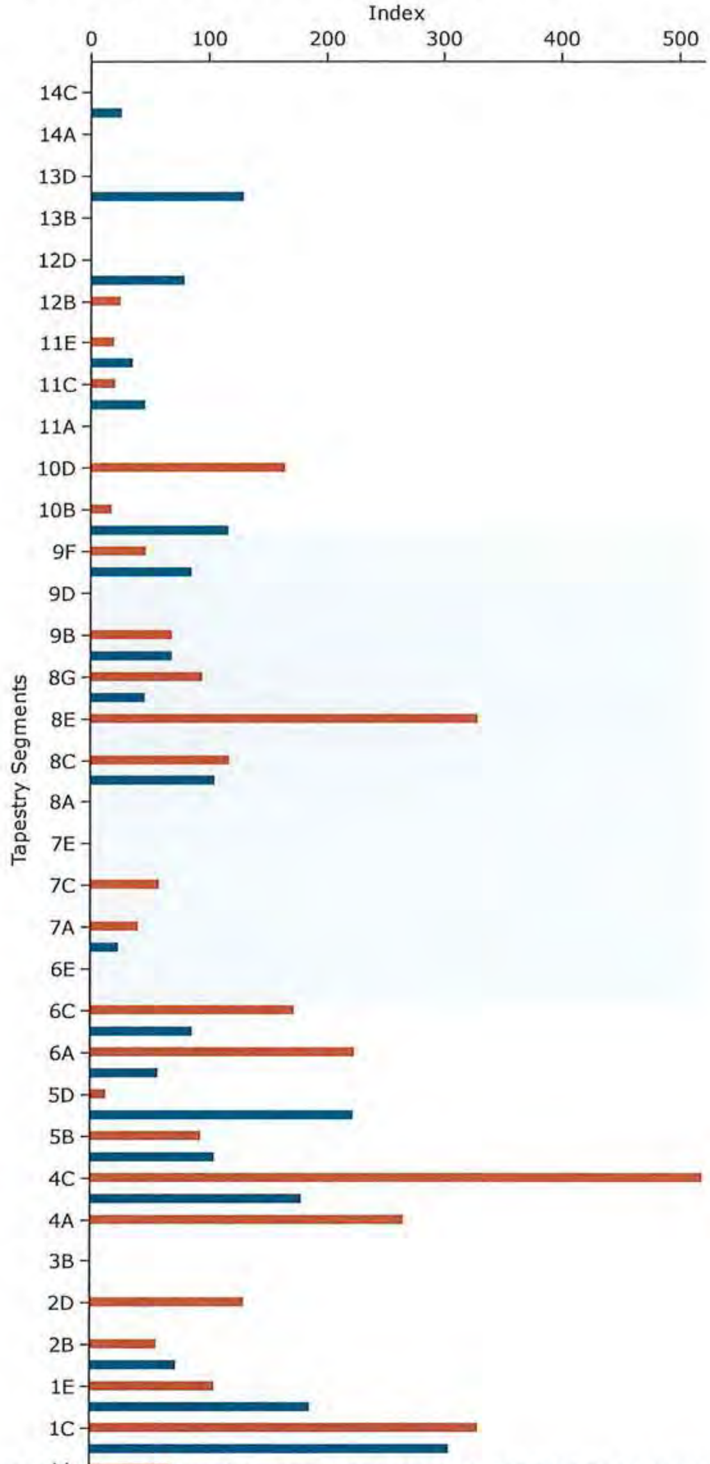
2016 Tapestry Indexes by Households



2016 Tapestry Indexes by Total Population 18+



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

Tapestry Segmentation Area Profile

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 24 mile radius

Latitude: 39.1507
Longitude: -77.9806

Tapestry LifeMode Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	157,983	100.0%		324,030	100.0%	
1. Affluent Estates	**30,348**	**19.2%**	**195**	**65,452**	**20.2%**	**195**
Top Tier (1A)	1,879	1.2%	69	4,076	1.3%	70
Professional Pride (1B)	7,683	4.9%	303	17,623	5.4%	306
Boomburbs (1C)	8,214	5.2%	337	17,532	5.4%	331
Savvy Suburbanites (1D)	9,200	5.8%	196	19,523	6.0%	188
Exurbanites (1E)	3,372	2.1%	110	6,698	2.1%	106
2. Upscale Avenues	**6,516**	**4.1%**	**72**	**13,102**	**4.0%**	**68**
Urban Chic (2A)	1,468	0.9%	70	2,988	0.9%	74
Pleasantville (2B)	2,256	1.4%	64	4,565	1.4%	57
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	2,792	1.8%	127	5,549	1.7%	132
3. Uptown Individuals	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
4. Family Landscapes	**41,125**	**26.0%**	**349**	**84,493**	**26.1%**	**339**
Soccer Moms (4A)	12,403	7.9%	276	26,207	8.1%	267
Home Improvement (4B)	5,283	3.3%	195	10,789	3.3%	181
Middleburg (4C)	23,439	14.8%	524	47,497	14.7%	521
5. GenXurban	**17,123**	**10.8%**	**94**	**34,825**	**10.7%**	**98**
Comfortable Empty Nesters (5A)	4,239	2.7%	109	8,574	2.6%	107
In Style (5B)	2,885	1.8%	81	6,479	2.0%	95
Parks and Rec (5C)	7,099	4.5%	224	14,273	4.4%	225
Rustbelt Traditions (5D)	507	0.3%	14	990	0.3%	15
Midlife Constants (5E)	2,393	1.5%	60	4,509	1.4%	58
6. Cozy Country Living	**20,190**	**12.8%**	**105**	**42,709**	**13.2%**	**111**
Green Acres (6A)	11,196	7.1%	222	24,093	7.4%	226
Salt of the Earth (6B)	3,960	2.5%	86	8,265	2.6%	88
The Great Outdoors (6C)	4,078	2.6%	166	8,587	2.7%	174
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	956	0.6%	26	1,764	0.5%	25
7. Ethnic Enclaves	**3,151**	**2.0%**	**28**	**6,505**	**2.0%**	**25**
Up and Coming Families (7A)	1,593	1.0%	44	3,313	1.0%	42
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
American Dreamers (7C)	1,558	1.0%	67	3,192	1.0%	59
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

September 12, 2016

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 24 mile radius

Latitude: 39.1507
Longitude: -77.9806

Tapestry LifeMode Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	157,983	100.0%		324,030	100.0%	
8. Middle Ground	**18,429**	**11.7%**	**106**	**35,122**	**10.8%**	**106**
City Lights (8A)	0	0.0%	0	0	0.0%	0
Emerald City (8B)	2,564	1.6%	115	4,216	1.3%	107
Bright Young Professionals (8C)	4,012	2.5%	114	7,720	2.4%	119
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	8,712	5.5%	344	16,415	5.1%	330
Old and Newcomers (8F)	1,283	0.8%	35	3,083	1.0%	47
Hardscrabble Road (8G)	1,858	1.2%	95	3,688	1.1%	96
9. Senior Styles	**3,787**	**2.4%**	**41**	**6,608**	**2.0%**	**41**
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	1,497	0.9%	71	2,678	0.8%	70
The Elders (9C)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	1,610	1.0%	84	2,882	0.9%	87
Social Security Set (9F)	680	0.4%	53	1,048	0.3%	48
10. Rustic Outposts	**9,208**	**5.8%**	**69**	**19,634**	**6.1%**	**72**
Southern Satellites (10A)	5,776	3.7%	116	12,234	3.8%	118
Rooted Rural (10B)	574	0.4%	18	1,193	0.4%	19
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	2,858	1.8%	158	6,207	1.9%	166
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
11. Midtown Singles	**2,871**	**1.8%**	**29**	**5,014**	**1.5%**	**28**
City Strivers (11A)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	1,359	0.9%	50	2,095	0.6%	47
Metro Fusion (11C)	476	0.3%	21	940	0.3%	22
Set to Impress (11D)	744	0.5%	34	1,427	0.4%	37
City Commons (11E)	292	0.2%	21	552	0.2%	21
12. Hometown	**3,225**	**2.0%**	**32**	**6,032**	**1.9%**	**31**
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	775	0.5%	25	1,563	0.5%	26
Small Town Simplicity (12C)	2,450	1.6%	82	4,469	1.4%	80
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
13. Next Wave	**1,686**	**1.1%**	**27**	**3,628**	**1.1%**	**25**
International Marketplace (13A)	0	0.0%	0	0	0.0%	0
Las Casas (13B)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	1,686	1.1%	137	3,628	1.1%	130
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
14. Scholars and Patriots	**324**	**0.2%**	**13**	**906**	**0.3%**	**12**
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
College Towns (14B)	324	0.2%	22	906	0.3%	27
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

September 12, 2016

Tapestry Segmentation Area Profile

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 24 mile radius

Latitude: 39.1507
Longitude: -77.9806

Tapestry Urbanization Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	157,983	100.0%		324,030	100.0%	
1. Principal Urban Center	**1,686**	**1.1%**	**15**	**3,628**	**1.1%**	**17**
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	1,686	1.1%	137	3,628	1.1%	130
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
2. Urban Periphery	**6,553**	**4.1%**	**24**	**12,842**	**4.0%**	**22**
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	507	0.3%	14	990	0.3%	15
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
American Dreamers (7C)	1,558	1.0%	67	3,192	1.0%	59
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0
City Lights (8A)	0	0.0%	0	0	0.0%	0
Bright Young Professionals (8C)	4,012	2.5%	114	7,720	2.4%	119
Metro Fusion (11C)	476	0.3%	21	940	0.3%	22
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
International Marketplace (13A)	0	0.0%	0	0	0.0%	0
Las Casas (13B)	0	0.0%	0	0	0.0%	0
3. Metro Cities	**23,086**	**14.6%**	**79**	**44,354**	**13.7%**	**81**
In Style (5B)	2,885	1.8%	81	6,479	2.0%	95
Emerald City (8B)	2,564	1.6%	115	4,216	1.3%	107
Front Porches (8E)	8,712	5.5%	344	16,415	5.1%	330
Old and Newcomers (8F)	1,283	0.8%	35	3,083	1.0%	47
Hardscrabble Road (8G)	1,858	1.2%	95	3,688	1.1%	96
Retirement Communities (9E)	1,610	1.0%	84	2,882	0.9%	87
Social Security Set (9F)	680	0.4%	53	1,048	0.3%	48
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Set to Impress (11D)	744	0.5%	34	1,427	0.4%	37
City Commons (11E)	292	0.2%	21	552	0.2%	21
Traditional Living (12B)	775	0.5%	25	1,563	0.5%	26
College Towns (14B)	324	0.2%	22	906	0.3%	27
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
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September 12, 2016

Tapestry Segmentation Area Profile

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 24 mile radius

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Tapestry Urbanization Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	157,983	100.0%		324,030	100.0%	
4. Suburban Periphery	**71,371**	**45.2%**	**142**	**148,897**	**46.0%**	**143**
Top Tier (1A)	1,879	1.2%	69	4,076	1.3%	70
Professional Pride (1B)	7,683	4.9%	303	17,623	5.4%	306
Boomburbs (1C)	8,214	5.2%	337	17,532	5.4%	331
Savvy Suburbanites (1D)	9,200	5.8%	196	19,523	6.0%	188
Exurbanites (1E)	3,372	2.1%	110	6,698	2.1%	106
Urban Chic (2A)	1,468	0.9%	70	2,988	0.9%	74
Pleasantville (2B)	2,256	1.4%	64	4,565	1.4%	57
Enterprising Professionals (2D)	2,792	1.8%	127	5,549	1.7%	132
Soccer Moms (4A)	12,403	7.9%	276	26,207	8.1%	267
Home Improvement (4B)	5,283	3.3%	195	10,789	3.3%	181
Comfortable Empty Nesters (5A)	4,239	2.7%	109	8,574	2.6%	107
Parks and Rec (5C)	7,099	4.5%	224	14,273	4.4%	225
Midlife Constants (5E)	2,393	1.5%	60	4,509	1.4%	58
Up and Coming Families (7A)	1,593	1.0%	44	3,313	1.0%	42
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	1,497	0.9%	71	2,678	0.8%	70
The Elders (9C)	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
5. Semirural	**29,703**	**18.8%**	**199**	**59,937**	**18.5%**	**204**
Middleburg (4C)	23,439	14.8%	524	47,497	14.7%	521
Heartland Communities (6F)	956	0.6%	26	1,764	0.5%	25
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	2,858	1.8%	158	6,207	1.9%	166
Small Town Simplicity (12C)	2,450	1.6%	82	4,469	1.4%	80
6. Rural	**25,584**	**16.2%**	**95**	**54,372**	**16.8%**	**99**
Green Acres (6A)	11,196	7.1%	222	24,093	7.4%	226
Salt of the Earth (6B)	3,960	2.5%	86	8,265	2.6%	88
The Great Outdoors (6C)	4,078	2.6%	166	8,587	2.7%	174
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	5,776	3.7%	116	12,234	3.8%	118
Rooted Rural (10B)	574	0.4%	18	1,193	0.4%	19
Diners & Miners (10C)	0	0.0%	0	0	0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

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September 12, 2016

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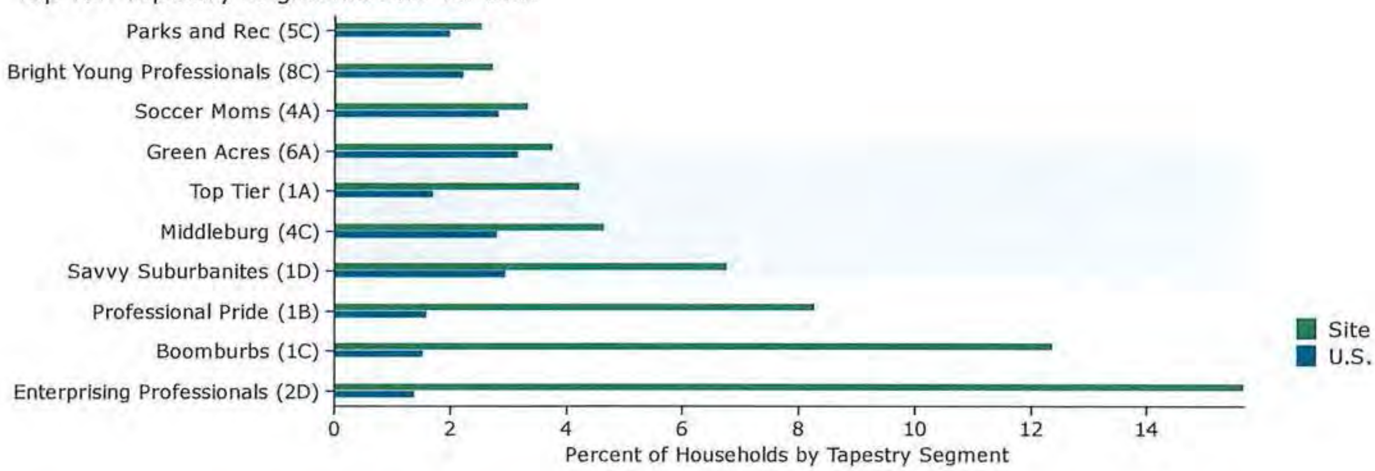
Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 40 mile radius

Latitude: 39.1507
Longitude: -77.9806

Top Twenty Tapestry Segments

		2016 Households		2016 U.S. Households		
			Cumulative		Cumulative	
Rank	Tapestry Segment	Percent	Percent	Percent	Percent	Index
1	Enterprising Professionals (2D)	15.7%	15.7%	1.4%	1.4%	1126
2	Boomburbs (1C)	12.4%	28.1%	1.5%	2.9%	802
3	Professional Pride (1B)	8.3%	36.4%	1.6%	4.5%	517
4	Savvy Suburbanites (1D)	6.8%	43.2%	3.0%	7.5%	227
5	Middleburg (4C)	4.7%	47.9%	2.8%	10.3%	165
	Subtotal	**47.9%**		**10.3%**		
6	Top Tier (1A)	4.2%	52.1%	1.7%	12.0%	248
7	Green Acres (6A)	3.8%	55.9%	3.2%	15.2%	118
8	Soccer Moms (4A)	3.4%	59.3%	2.8%	18.0%	118
9	Bright Young Professionals (8C)	2.8%	62.1%	2.2%	20.2%	124
10	Parks and Rec (5C)	2.5%	64.6%	2.0%	22.2%	127
	Subtotal	**16.7%**		**11.9%**		
11	Pleasantville (2B)	2.5%	67.1%	2.2%	24.4%	111
12	Salt of the Earth (6B)	2.4%	69.5%	2.9%	27.3%	81
13	Metro Renters (3B)	2.0%	71.5%	1.5%	28.8%	134
14	Front Porches (8E)	1.9%	73.4%	1.6%	30.4%	119
15	Home Improvement (4B)	1.8%	75.2%	1.7%	32.1%	104
	Subtotal	**10.6%**		**9.9%**		
16	Golden Years (9B)	1.8%	77.0%	1.3%	33.4%	133
17	Exurbanites (1E)	1.7%	78.7%	1.9%	35.3%	89
18	The Great Outdoors (6C)	1.6%	80.3%	1.6%	36.9%	103
19	Comfortable Empty Nesters (5A)	1.5%	81.8%	2.5%	39.4%	60
20	Midlife Constants (5E)	1.4%	83.2%	2.5%	41.9%	54
	Subtotal	**8.0%**		**9.8%**		
	Total	**83.0%**		**42.1%**		**197**

Top Ten Tapestry Segments Site vs. U.S.

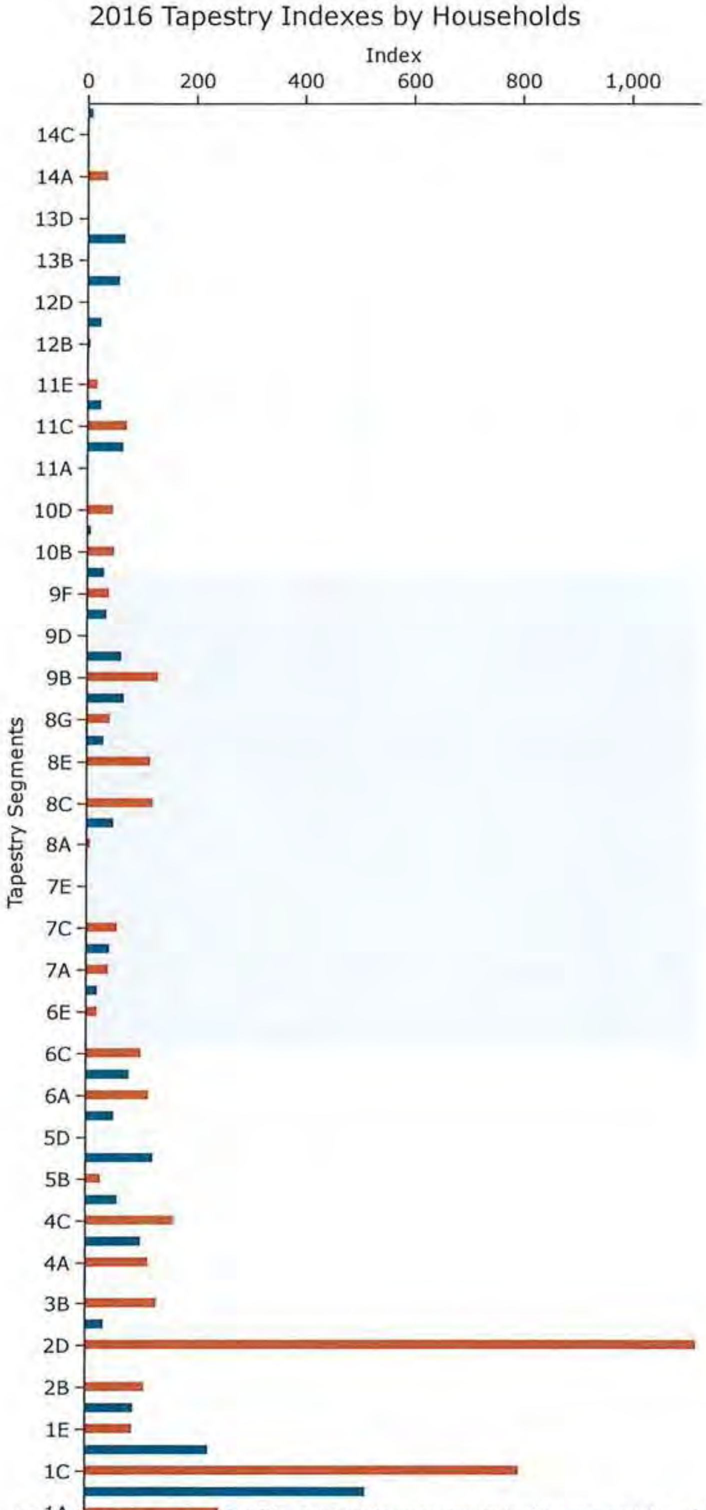


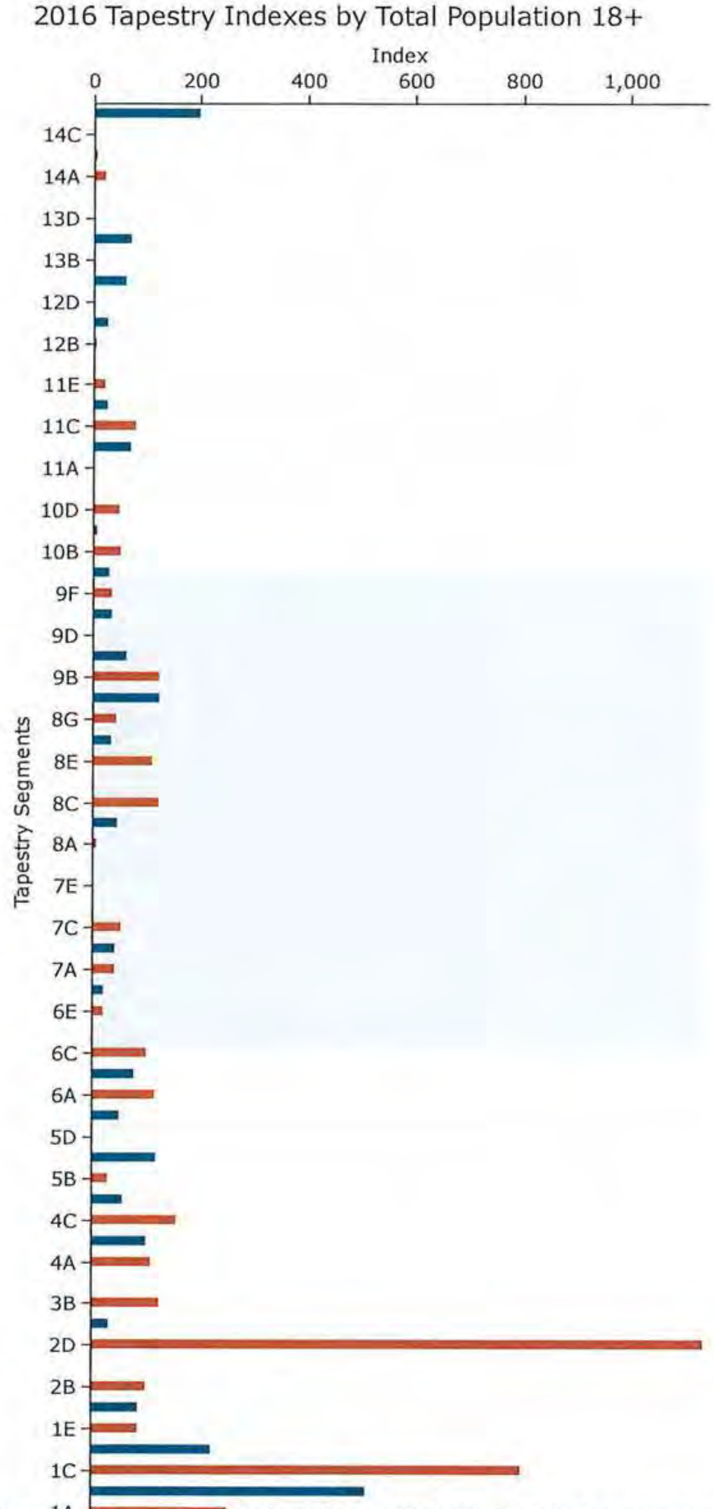
Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

September 12, 2016

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 40 mile radius

Latitude: 39.1507
Longitude: -77.9806





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Source: Esri

Tapestry Segmentation Area Profile

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 40 mile radius

Latitude: 39.1507
Longitude: -77.9806

Tapestry LifeMode Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	667,936	100.0%		1,397,188	100.0%	
1. Affluent Estates	**223,330**	**33.4%**	**339**	**501,997**	**35.9%**	**346**
Top Tier (1A)	28,381	4.2%	248	64,412	4.6%	255
Professional Pride (1B)	55,429	8.3%	517	127,862	9.2%	514
Boomburbs (1C)	82,750	12.4%	802	183,553	13.1%	803
Savvy Suburbanites (1D)	45,190	6.8%	227	101,675	7.3%	227
Exurbanites (1E)	11,580	1.7%	89	24,495	1.8%	90
2. Upscale Avenues	**129,133**	**19.3%**	**339**	**258,950**	**18.5%**	**313**
Urban Chic (2A)	7,952	1.2%	90	15,633	1.1%	90
Pleasantville (2B)	16,443	2.5%	111	36,000	2.6%	104
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	104,738	15.7%	1,126	207,317	14.8%	1,141
3. Uptown Individuals	**16,121**	**2.4%**	**66**	**25,544**	**1.8%**	**61**
Laptops and Lattes (3A)	2,583	0.4%	37	4,048	0.3%	34
Metro Renters (3B)	13,538	2.0%	134	21,496	1.5%	129
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
4. Family Landscapes	**65,492**	**9.8%**	**131**	**137,432**	**9.8%**	**128**
Soccer Moms (4A)	22,424	3.4%	118	47,892	3.4%	113
Home Improvement (4B)	11,959	1.8%	104	26,543	1.9%	103
Middleburg (4C)	31,109	4.7%	165	62,997	4.5%	160
5. GenXurban	**40,895**	**6.1%**	**53**	**81,300**	**5.8%**	**53**
Comfortable Empty Nesters (5A)	9,876	1.5%	60	20,215	1.4%	59
In Style (5B)	4,335	0.6%	29	9,239	0.7%	31
Parks and Rec (5C)	17,029	2.5%	127	33,074	2.4%	121
Rustbelt Traditions (5D)	507	0.1%	3	990	0.1%	3
Midlife Constants (5E)	9,148	1.4%	54	17,782	1.3%	53
6. Cozy Country Living	**56,790**	**8.5%**	**70**	**117,994**	**8.4%**	**71**
Green Acres (6A)	25,244	3.8%	118	54,204	3.9%	118
Salt of the Earth (6B)	15,716	2.4%	81	32,373	2.3%	80
The Great Outdoors (6C)	10,748	1.6%	103	21,892	1.6%	103
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	1,510	0.2%	22	2,899	0.2%	22
Heartland Communities (6F)	3,572	0.5%	23	6,626	0.5%	22
7. Ethnic Enclaves	**15,476**	**2.3%**	**33**	**36,273**	**2.6%**	**32**
Up and Coming Families (7A)	6,584	1.0%	43	14,606	1.0%	43
Urban Villages (7B)	3,218	0.5%	45	8,876	0.6%	43
American Dreamers (7C)	5,674	0.8%	58	12,791	0.9%	55
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0

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Source: Esri

September 12, 2016

Tapestry Segmentation Area Profile

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 40 mile radius

Latitude: 39.1507
Longitude: -77.9806

Tapestry LifeMode Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	667,936	100.0%		1,397,188	100.0%	
8. Middle Ground	**46,157**	**6.9%**	**63**	**86,890**	**6.2%**	**61**
City Lights (8A)	948	0.1%	10	1,965	0.1%	9
Emerald City (8B)	4,993	0.7%	53	8,386	0.6%	49
Bright Young Professionals (8C)	18,395	2.8%	124	34,995	2.5%	125
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	12,756	1.9%	119	24,109	1.7%	112
Old and Newcomers (8F)	5,334	0.8%	34	10,098	0.7%	36
Hardscrabble Road (8G)	3,731	0.6%	45	7,337	0.5%	45
9. Senior Styles	**24,013**	**3.6%**	**62**	**41,025**	**2.9%**	**59**
Silver & Gold (9A)	3,521	0.5%	69	6,343	0.5%	66
Golden Years (9B)	11,950	1.8%	133	20,828	1.5%	125
The Elders (9C)	3,167	0.5%	65	5,154	0.4%	63
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	3,068	0.5%	38	5,298	0.4%	37
Social Security Set (9F)	2,307	0.3%	43	3,402	0.2%	36
10. Rustic Outposts	**18,377**	**2.8%**	**33**	**38,011**	**2.7%**	**32**
Southern Satellites (10A)	6,925	1.0%	33	14,463	1.0%	32
Rooted Rural (10B)	7,180	1.1%	53	14,417	1.0%	52
Diners & Miners (10C)	460	0.1%	10	850	0.0%	9
Down the Road (10D)	3,812	0.6%	50	8,281	0.6%	51
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
11. Midtown Singles	**18,550**	**2.8%**	**44**	**35,510**	**2.5%**	**46**
City Strivers (11A)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	7,754	1.2%	68	13,478	1.0%	70
Metro Fusion (11C)	6,938	1.0%	74	14,607	1.0%	80
Set to Impress (11D)	2,619	0.4%	28	4,741	0.3%	28
City Commons (11E)	1,239	0.2%	21	2,684	0.2%	24
12. Hometown	**4,248**	**0.6%**	**10**	**7,929**	**0.6%**	**10**
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	775	0.1%	6	1,563	0.1%	6
Small Town Simplicity (12C)	3,473	0.5%	27	6,366	0.5%	27
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
13. Next Wave	**8,640**	**1.3%**	**33**	**20,435**	**1.5%**	**33**
International Marketplace (13A)	4,971	0.7%	60	11,881	0.9%	61
Las Casas (13B)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	3,669	0.5%	71	8,554	0.6%	71
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
14. Scholars and Patriots	**713**	**0.1%**	**7**	**1,759**	**0.1%**	**5**
Military Proximity (14A)	389	0.1%	39	853	0.1%	22
College Towns (14B)	324	0.0%	5	906	0.1%	6
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0
Unclassified (15)	1	0.0%	11	6,139	0.4%	199

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September 12, 2016

esri

Tapestry Segmentation Area Profile

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 40 mile radius

Latitude: 39.1507
Longitude: -77.9806

Tapestry Urbanization Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	667,936	100.0%		1,397,188	100.0%	
1. Principal Urban Center	**19,790**	**3.0%**	**42**	**34,098**	**2.4%**	**37**
Laptops and Lattes (3A)	2,583	0.4%	37	4,048	0.3%	34
Metro Renters (3B)	13,538	2.0%	134	21,496	1.5%	129
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	3,669	0.5%	71	8,554	0.6%	71
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
2. Urban Periphery	**40,651**	**6.1%**	**36**	**86,105**	**6.2%**	**34**
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	507	0.1%	3	990	0.1%	3
Urban Villages (7B)	3,218	0.5%	45	8,876	0.6%	43
American Dreamers (7C)	5,674	0.8%	58	12,791	0.9%	55
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0
City Lights (8A)	948	0.1%	10	1,965	0.1%	9
Bright Young Professionals (8C)	18,395	2.8%	124	34,995	2.5%	125
Metro Fusion (11C)	6,938	1.0%	74	14,607	1.0%	80
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
International Marketplace (13A)	4,971	0.7%	60	11,881	0.9%	61
Las Casas (13B)	0	0.0%	0	0	0.0%	0
3. Metro Cities	**49,235**	**7.4%**	**40**	**91,241**	**6.5%**	**39**
In Style (5B)	4,335	0.6%	29	9,239	0.7%	31
Emerald City (8B)	4,993	0.7%	53	8,386	0.6%	49
Front Porches (8E)	12,756	1.9%	119	24,109	1.7%	112
Old and Newcomers (8F)	5,334	0.8%	34	10,098	0.7%	36
Hardscrabble Road (8G)	3,731	0.6%	45	7,337	0.5%	45
Retirement Communities (9E)	3,068	0.5%	38	5,298	0.4%	37
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City Commons (11E)	1,239	0.2%	21	2,684	0.2%	24
Traditional Living (12B)	775	0.1%	6	1,563	0.1%	6
College Towns (14B)	324	0.0%	5	906	0.1%	6
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0

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Source: Esri

September 12, 2016

esri

Tapestry Segmentation Area Profile

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 40 mile radius

Latitude: 39.1507
Longitude: -77.9806

Tapestry Urbanization Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	667,936	100.0%		1,397,188	100.0%	
4. Suburban Periphery	**448,510**	**67.1%**	**211**	**954,237**	**68.3%**	**212**
Top Tier (1A)	28,381	4.2%	248	64,412	4.6%	255
Professional Pride (1B)	55,429	8.3%	517	127,862	9.2%	514
Boomburbs (1C)	82,750	12.4%	802	183,553	13.1%	803
Savvy Suburbanites (1D)	45,190	6.8%	227	101,675	7.3%	227
Exurbanites (1E)	11,580	1.7%	89	24,495	1.8%	90
Urban Chic (2A)	7,952	1.2%	90	15,633	1.1%	90
Pleasantville (2B)	16,443	2.5%	111	36,000	2.6%	104
Enterprising Professionals (2D)	104,738	15.7%	1,126	207,317	14.8%	1,141
Soccer Moms (4A)	22,424	3.4%	118	47,892	3.4%	113
Home Improvement (4B)	11,959	1.8%	104	26,543	1.9%	103
Comfortable Empty Nesters (5A)	9,876	1.5%	60	20,215	1.4%	59
Parks and Rec (5C)	17,029	2.5%	127	33,074	2.4%	121
Midlife Constants (5E)	9,148	1.4%	54	17,782	1.3%	53
Up and Coming Families (7A)	6,584	1.0%	43	14,606	1.0%	43
Silver & Gold (9A)	3,521	0.5%	69	6,343	0.5%	66
Golden Years (9B)	11,950	1.8%	133	20,828	1.5%	125
The Elders (9C)	3,167	0.5%	65	5,154	0.4%	63
Military Proximity (14A)	389	0.1%	39	853	0.1%	22
5. Semirural	**41,966**	**6.3%**	**66**	**84,270**	**6.0%**	**67**
Middleburg (4C)	31,109	4.7%	165	62,997	4.5%	160
Heartland Communities (6F)	3,572	0.5%	23	6,626	0.5%	22
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	3,812	0.6%	50	8,281	0.6%	51
Small Town Simplicity (12C)	3,473	0.5%	27	6,366	0.5%	27
6. Rural	**67,783**	**10.1%**	**59**	**141,098**	**10.1%**	**59**
Green Acres (6A)	25,244	3.8%	118	54,204	3.9%	118
Salt of the Earth (6B)	15,716	2.4%	81	32,373	2.3%	80
The Great Outdoors (6C)	10,748	1.6%	103	21,892	1.6%	103
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	1,510	0.2%	22	2,899	0.2%	22
Southern Satellites (10A)	6,925	1.0%	33	14,463	1.0%	32
Rooted Rural (10B)	7,180	1.1%	53	14,417	1.0%	52
Diners & Miners (10C)	460	0.1%	10	850	0%	9
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
Unclassified (15)	1	0.0%	11	6,139	0.4%	199

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September 12, 2016

Retail MarketPlace Profile

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 8 mile radius

Latitude: 39.1507
Longitude: -77.9806

Summary Demographics	
2016 Population	27,683
2016 Households	10,091
2016 Median Disposable Income	$57,807
2016 Per Capita Income	$33,599

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	$479,266,223	$188,265,039	$291,001,184	43.6	131
Total Retail Trade	44-45	$432,936,471	$174,965,905	$257,970,566	42.4	100
Total Food & Drink	722	$46,329,751	$13,299,133	$33,030,618	55.4	31

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$102,651,820	$15,643,602	$87,008,218	73.6	11
Automobile Dealers	4411	$85,763,843	$10,422,185	$75,341,658	78.3	4
Other Motor Vehicle Dealers	4412	$10,674,362	$2,784,460	$7,889,902	58.6	1
Auto Parts, Accessories & Tire Stores	4413	$6,213,615	$2,436,957	$3,776,658	43.7	6
Furniture & Home Furnishings Stores	442	$13,003,734	$3,342,707	$9,661,027	59.1	4
Furniture Stores	4421	$7,875,030	$1,478,011	$6,397,019	68.4	1
Home Furnishings Stores	4422	$5,128,705	$1,864,696	$3,264,009	46.7	2
Electronics & Appliance Stores	443	$17,310,892	$4,335,039	$12,975,853	59.9	2
Bldg Materials, Garden Equip. & Supply Stores	444	$21,542,574	$15,498,748	$6,043,826	16.3	14
Bldg Material & Supplies Dealers	4441	$19,549,451	$14,588,038	$4,961,413	14.5	12
Lawn & Garden Equip & Supply Stores	4442	$1,993,124	$910,710	$1,082,414	37.3	2
Food & Beverage Stores	445	$81,867,923	$50,284,525	$31,583,398	23.9	14
Grocery Stores	4451	$76,574,971	$45,536,942	$31,038,029	25.4	9
Specialty Food Stores	4452	$2,361,966	$2,652,711	-$290,745	-5.8	3
Beer, Wine & Liquor Stores	4453	$2,930,986	$2,094,872	$836,114	16.6	2
Health & Personal Care Stores	446,4461	$23,794,860	$11,007,785	$12,787,075	36.7	6
Gasoline Stations	447,4471	$30,295,518	$24,021,315	$6,274,203	11.6	8
Clothing & Clothing Accessories Stores	448	$20,728,354	$1,527,171	$19,201,183	86.3	4
Clothing Stores	4481	$14,673,188	$1,082,105	$13,591,083	86.3	3
Shoe Stores	4482	$2,352,155	$0	$2,352,155	100.0	0
Jewelry, Luggage & Leather Goods Stores	4483	$3,703,012	$445,066	$3,257,946	78.5	1
Sporting Goods, Hobby, Book & Music Stores	451	$12,056,315	$3,355,347	$8,700,968	56.5	9
Sporting Goods/Hobby/Musical Instr Stores	4511	$9,705,765	$2,622,321	$7,083,444	57.5	7
Book, Periodical & Music Stores	4512	$2,350,550	$733,027	$1,617,523	52.5	1
General Merchandise Stores	452	$83,405,836	$37,223,511	$46,182,325	38.3	4
Department Stores Excluding Leased Depts.	4521	$64,359,673	$12,883,484	$51,476,189	66.6	1
Other General Merchandise Stores	4529	$19,046,163	$24,340,028	-$5,293,865	-12.2	3
Miscellaneous Store Retailers	453	$14,093,980	$8,590,229	$5,503,751	24.3	26
Florists	4531	$856,245	$360,758	$495,487	40.7	1
Office Supplies, Stationery & Gift Stores	4532	$4,122,724	$604,002	$3,518,722	74.4	5
Used Merchandise Stores	4533	$1,880,887	$1,358,496	$522,391	16.1	9
Other Miscellaneous Store Retailers	4539	$7,234,123	$6,266,973	$967,150	7.2	10
Nonstore Retailers	454	$12,184,665	$0	$12,184,665	100.0	0
Electronic Shopping & Mail-Order Houses	4541	$8,550,022	$0	$8,550,022	100.0	0
Vending Machine Operators	4542	$635,575	$0	$635,575	100.0	0
Direct Selling Establishments	4543	$2,999,068	$0	$2,999,068	100.0	0
Food Services & Drinking Places	722	$46,329,751	$13,299,133	$33,030,618	55.4	31
Full-Service Restaurants	7221	$25,255,753	$6,449,491	$18,806,262	59.3	19
Limited-Service Eating Places	7222	$19,743,084	$6,466,934	$13,276,150	50.7	8
Special Food Services	7223	$862,132	$356,768	$505,364	41.5	3
Drinking Places - Alcoholic Beverages	7224	$468,782	$0	$468,782	100.0	0

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.
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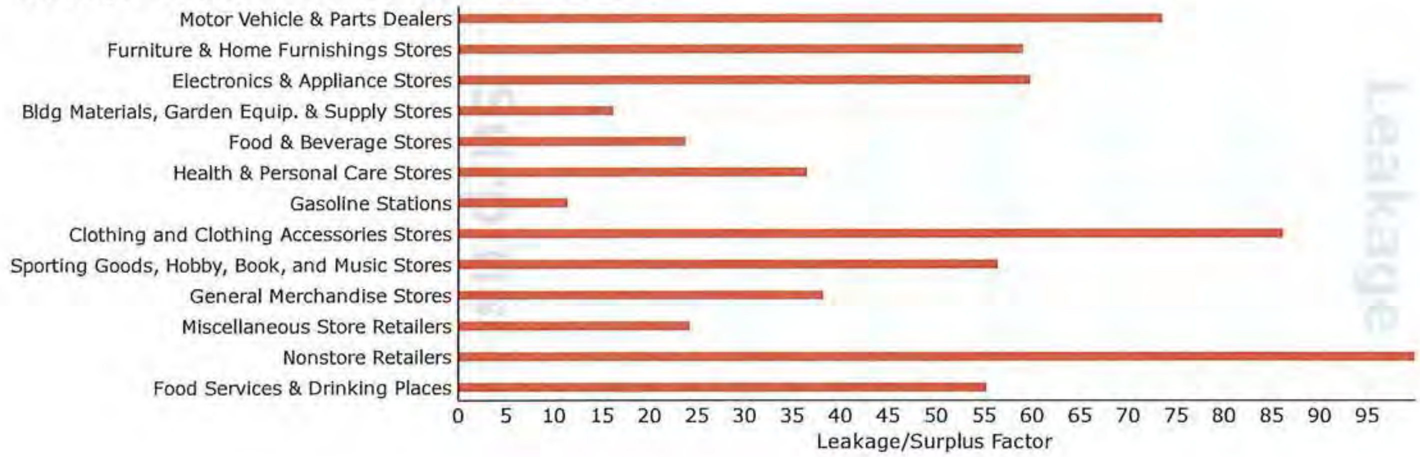
Source: Esri and Infogroup. Retail MarketPlace 2016 Release 1 (2015 data in 2016 geography)

September 12, 2016

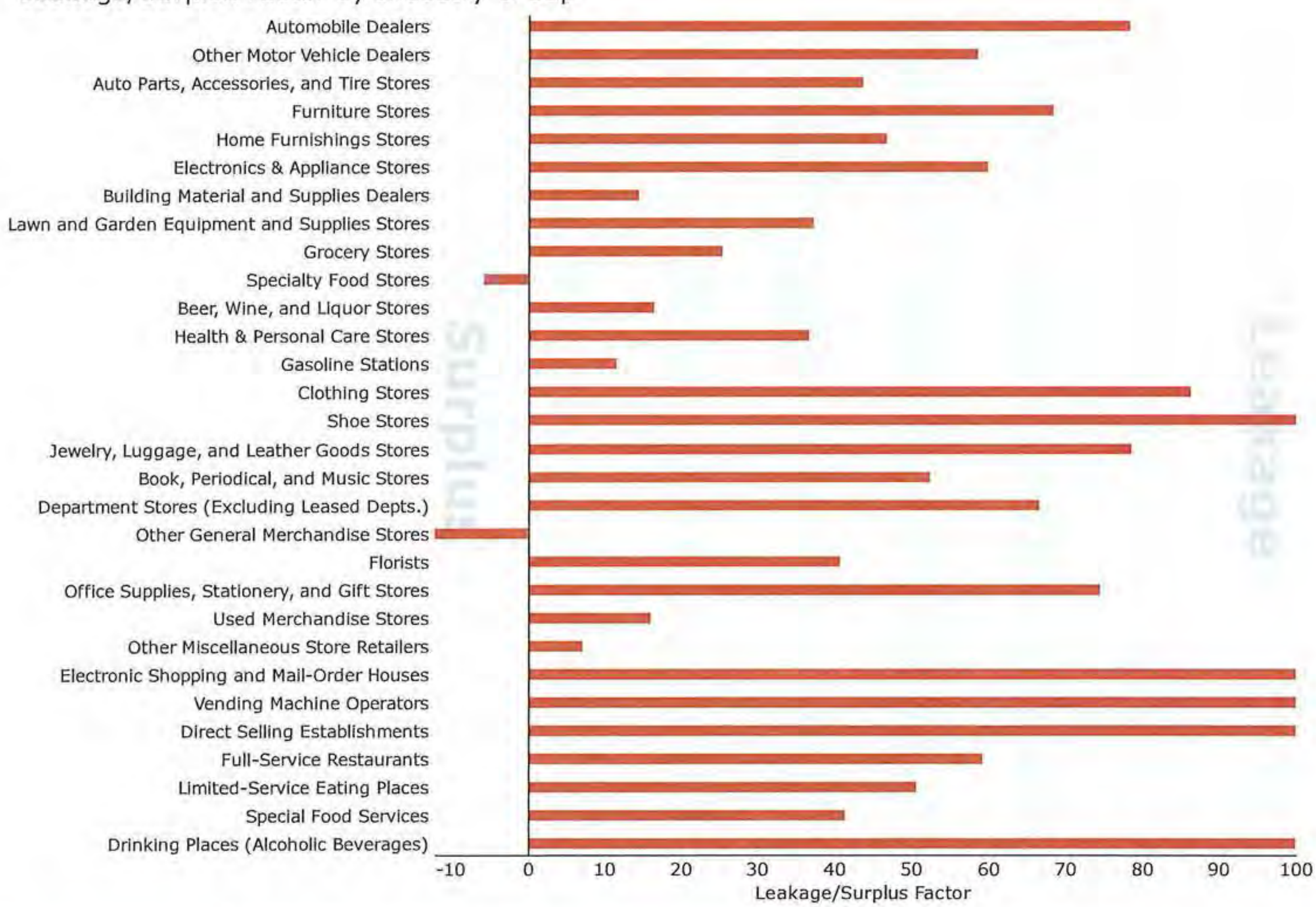
Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 8 mile radius

Latitude: 39.1507
Longitude: -77.9806

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



Source: Esri and Infogroup. Retail MarketPlace 2016 Release 1 (2015 data in 2016 geography) Copyright 2016 Infogroup, Inc. All rights reserved.

September 12, 2016

Retail MarketPlace Profile

Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 24 mile radius

Latitude: 39.1507
Longitude: -77.9806

Summary Demographics						
2016 Population						426,812
2016 Households						157,984
2016 Median Disposable Income						$54,420
2016 Per Capita Income						$33,908

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	$7,668,766,876	$6,176,788,920	$1,491,977,956	10.8	3,227
Total Retail Trade	44-45	$6,922,340,562	$5,594,262,493	$1,328,078,069	10.6	2,333
Total Food & Drink	722	$746,426,313	$582,526,427	$163,899,886	12.3	894

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$1,628,775,732	$1,024,924,832	$603,850,900	22.8	315
Automobile Dealers	4411	$1,355,532,754	$841,247,571	$514,285,183	23.4	175
Other Motor Vehicle Dealers	4412	$169,631,933	$68,416,387	$101,215,546	42.5	29
Auto Parts, Accessories & Tire Stores	4413	$103,611,045	$115,260,873	-$11,649,828	-5.3	111
Furniture & Home Furnishings Stores	442	$202,134,462	$151,692,218	$50,442,244	14.3	124
Furniture Stores	4421	$126,051,450	$93,518,299	$32,533,151	14.8	52
Home Furnishings Stores	4422	$76,083,012	$58,173,919	$17,909,093	13.3	72
Electronics & Appliance Stores	443	$263,623,118	$210,304,481	$53,318,637	11.3	127
Bldg Materials, Garden Equip. & Supply Stores	444	$339,068,667	$287,795,976	$51,272,691	8.2	178
Bldg Material & Supplies Dealers	4441	$309,248,075	$265,129,164	$44,118,911	7.7	140
Lawn & Garden Equip & Supply Stores	4442	$29,820,592	$22,666,813	$7,153,779	13.6	38
Food & Beverage Stores	445	$1,320,046,205	$1,344,193,856	-$24,147,651	-0.9	317
Grocery Stores	4451	$1,235,502,937	$1,232,985,387	$2,517,550	0.1	218
Specialty Food Stores	4452	$39,165,417	$78,288,985	-$39,123,568	-33.3	70
Beer, Wine & Liquor Stores	4453	$45,377,852	$32,919,484	$12,458,368	15.9	29
Health & Personal Care Stores	446,4461	$380,784,149	$280,239,701	$100,544,448	15.2	166
Gasoline Stations	447,4471	$486,758,691	$359,887,946	$126,870,745	15.0	97
Clothing & Clothing Accessories Stores	448	$316,667,913	$174,783,672	$141,884,241	28.9	199
Clothing Stores	4481	$220,591,996	$107,642,611	$112,949,385	34.4	123
Shoe Stores	4482	$36,896,775	$26,970,426	$9,926,349	15.5	30
Jewelry, Luggage & Leather Goods Stores	4483	$59,179,142	$40,170,636	$19,008,506	19.1	46
Sporting Goods, Hobby, Book & Music Stores	451	$199,805,845	$167,128,750	$32,677,095	8.9	200
Sporting Goods/Hobby/Musical Instr Stores	4511	$159,367,015	$131,524,016	$27,842,999	9.6	165
Book, Periodical & Music Stores	4512	$40,438,829	$35,604,734	$4,834,095	6.4	35
General Merchandise Stores	452	$1,381,223,626	$1,183,708,720	$197,514,906	7.7	115
Department Stores Excluding Leased Depts.	4521	$1,072,642,908	$934,356,431	$138,286,477	6.9	38
Other General Merchandise Stores	4529	$308,580,719	$249,352,289	$59,228,430	10.6	76
Miscellaneous Store Retailers	453	$226,186,237	$271,333,863	-$45,147,626	-9.1	449
Florists	4531	$13,512,004	$10,330,400	$3,181,604	13.3	38
Office Supplies, Stationery & Gift Stores	4532	$65,129,435	$42,254,766	$22,874,669	21.3	106
Used Merchandise Stores	4533	$26,839,732	$30,787,215	-$3,947,483	-6.9	140
Other Miscellaneous Store Retailers	4539	$120,705,066	$187,961,482	-$67,256,416	-21.8	165
Nonstore Retailers	454	$177,265,918	$138,268,477	$38,997,441	12.4	47
Electronic Shopping & Mail-Order Houses	4541	$125,829,878	$99,283,676	$26,546,202	11.8	20
Vending Machine Operators	4542	$8,948,293	$10,229,473	-$1,281,180	-6.7	11
Direct Selling Establishments	4543	$42,487,747	$28,755,329	$13,732,418	19.3	16
Food Services & Drinking Places	722	$746,426,313	$582,526,427	$163,899,886	12.3	894
Full-Service Restaurants	7221	$401,156,414	$285,315,743	$115,840,671	16.9	545
Limited-Service Eating Places	7222	$322,489,706	$271,667,264	$50,822,442	8.6	290
Special Food Services	7223	$12,259,193	$12,028,559	$230,634	0.9	19
Drinking Places - Alcoholic Beverages	7224	$10,521,000	$13,514,861	-$2,993,861	-12.5	39

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.
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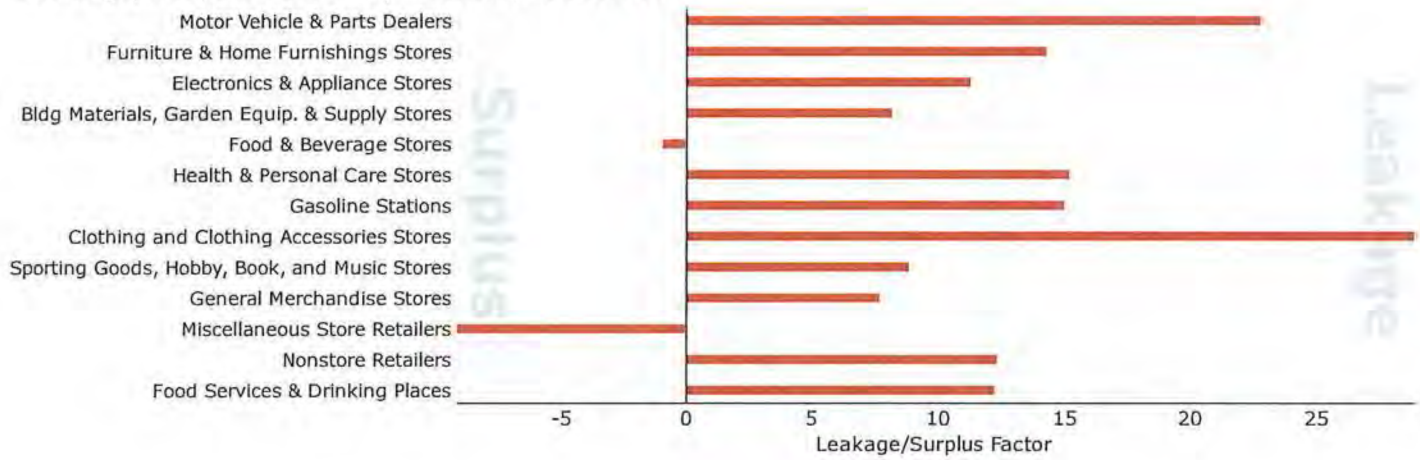
Source: Esri and Infogroup. Retail MarketPlace 2016 Release 1 (2015 data in 2016 geography)

September 12, 2016

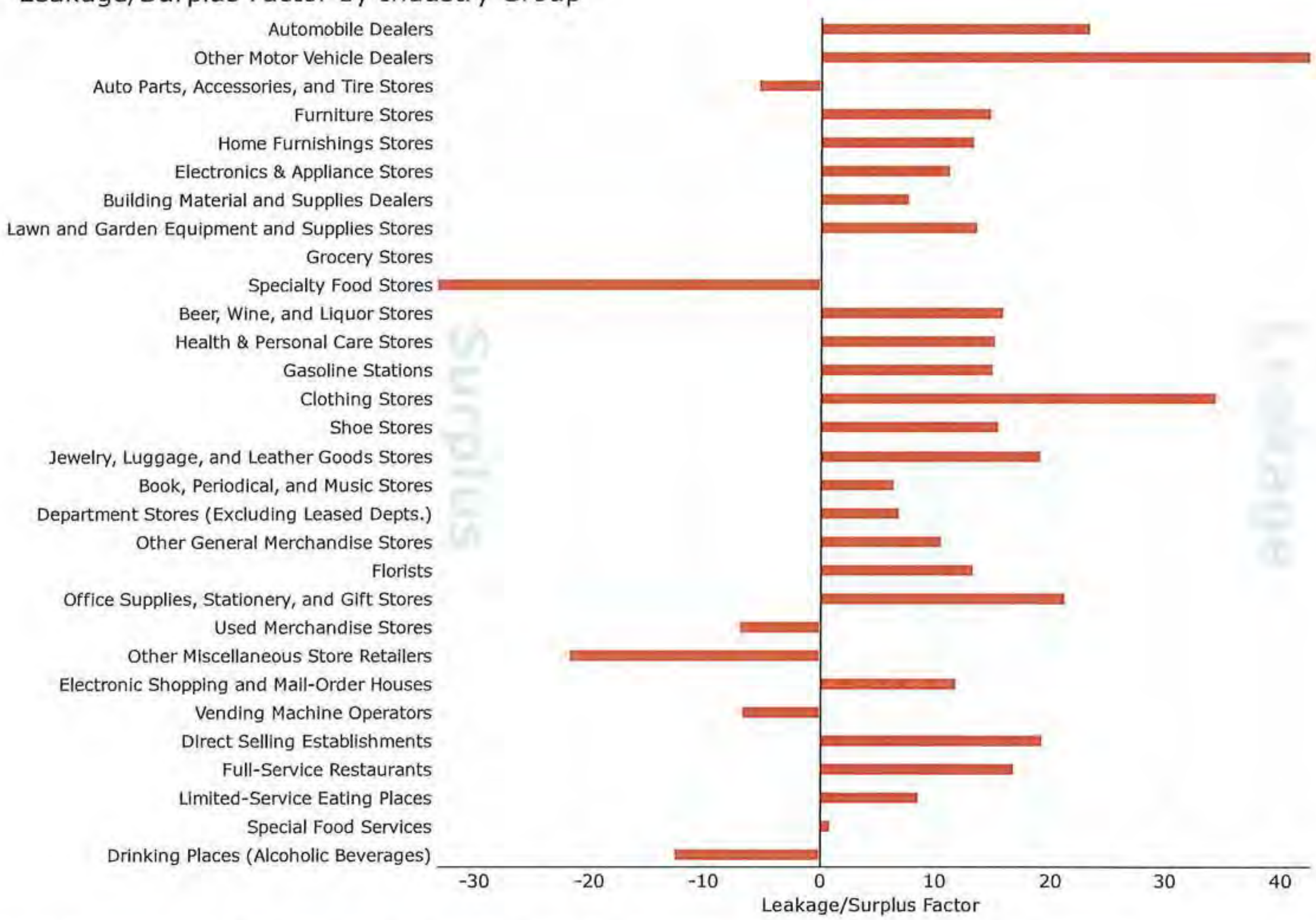
Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 24 mile radius

Latitude: 39.1507
Longitude: -77.9806

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



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Downtown Berryville, VA
24 East Main Street Berryville VA 22611
Ring: 40 mile radius

Latitude: 39.1507
Longitude: -77.9806

Summary Demographics						
2016 Population						1,873,099
2016 Households						667,937
2016 Median Disposable Income						$65,906
2016 Per Capita Income						$41,336

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	$40,895,429,603	$30,547,497,041	$10,347,932,562	14.5	13,060
Total Retail Trade	44-45	$36,859,359,810	$27,635,190,432	$9,224,169,378	14.3	9,242
Total Food & Drink	722	$4,036,069,794	$2,912,306,609	$1,123,763,185	16.2	3,818

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$8,583,102,400	$5,464,335,520	$3,118,766,880	22.2	1,021
Automobile Dealers	4411	$7,157,756,067	$4,827,590,789	$2,330,165,278	19.4	546
Other Motor Vehicle Dealers	4412	$916,973,547	$293,603,010	$623,370,537	51.5	110
Auto Parts, Accessories & Tire Stores	4413	$508,372,786	$343,141,722	$165,231,064	19.4	366
Furniture & Home Furnishings Stores	442	$1,135,744,327	$666,568,953	$469,175,374	26.0	561
Furniture Stores	4421	$697,479,233	$399,322,761	$298,156,472	27.2	237
Home Furnishings Stores	4422	$438,265,094	$267,246,193	$171,018,901	24.2	324
Electronics & Appliance Stores	443	$1,655,443,398	$3,617,721,050	-$1,962,277,652	-37.2	1,163
Bldg Materials, Garden Equip. & Supply Stores	444	$1,832,674,967	$1,333,537,772	$499,137,195	15.8	688
Bldg Material & Supplies Dealers	4441	$1,674,415,728	$1,184,657,360	$489,758,368	17.1	545
Lawn & Garden Equip & Supply Stores	4442	$158,259,239	$148,880,412	$9,378,827	3.1	143
Food & Beverage Stores	445	$7,059,689,222	$5,466,009,354	$1,593,679,868	12.7	1,090
Grocery Stores	4451	$6,470,642,623	$5,111,840,094	$1,358,802,529	11.7	710
Specialty Food Stores	4452	$247,547,147	$179,123,098	$68,424,049	16.0	234
Beer, Wine & Liquor Stores	4453	$341,499,451	$175,046,162	$166,453,289	32.2	147
Health & Personal Care Stores	446,4461	$1,979,934,740	$1,155,873,563	$824,061,177	26.3	685
Gasoline Stations	447,4471	$2,434,966,268	$1,437,254,065	$997,712,203	25.8	358
Clothing & Clothing Accessories Stores	448	$1,965,235,262	$1,036,029,259	$929,206,003	31.0	971
Clothing Stores	4481	$1,386,690,614	$737,733,920	$648,956,694	30.5	631
Shoe Stores	4482	$225,510,358	$140,121,459	$85,388,899	23.4	142
Jewelry, Luggage & Leather Goods Stores	4483	$353,034,291	$158,173,881	$194,860,410	38.1	198
Sporting Goods, Hobby, Book & Music Stores	451	$1,064,329,643	$676,267,550	$388,062,093	22.3	671
Sporting Goods/Hobby/Musical Instr Stores	4511	$853,034,337	$576,736,598	$276,297,739	19.3	568
Book, Periodical & Music Stores	4512	$211,295,305	$99,530,952	$111,764,353	36.0	103
General Merchandise Stores	452	$6,860,546,505	$5,146,889,377	$1,713,657,128	14.3	387
Department Stores Excluding Leased Depts.	4521	$5,272,400,703	$3,460,212,010	$1,812,188,693	20.8	156
Other General Merchandise Stores	4529	$1,588,145,803	$1,686,677,367	-$98,531,564	-3.0	231
Miscellaneous Store Retailers	453	$1,272,737,140	$1,138,310,639	$134,426,501	5.6	1,450
Florists	4531	$64,310,040	$33,874,950	$30,435,090	31.0	120
Office Supplies, Stationery & Gift Stores	4532	$344,097,609	$302,807,303	$41,290,306	6.4	395
Used Merchandise Stores	4533	$175,299,181	$96,558,868	$78,740,313	29.0	349
Other Miscellaneous Store Retailers	4539	$689,030,310	$705,069,518	-$16,039,208	-1.2	586
Nonstore Retailers	454	$1,014,955,936	$496,393,329	$518,562,607	34.3	197
Electronic Shopping & Mail-Order Houses	4541	$677,850,917	$337,498,883	$340,352,034	33.5	99
Vending Machine Operators	4542	$60,660,039	$36,407,606	$24,252,433	25.0	31
Direct Selling Establishments	4543	$276,444,980	$122,486,840	$153,958,140	38.6	68
Food Services & Drinking Places	722	$4,036,069,794	$2,912,306,609	$1,123,763,185	16.2	3,818
Full-Service Restaurants	7221	$2,210,838,356	$1,457,999,242	$752,839,114	20.5	2,259
Limited-Service Eating Places	7222	$1,698,198,826	$1,313,214,951	$384,983,875	12.8	1,349
Special Food Services	7223	$80,275,185	$90,975,502	-$10,700,317	-6.2	106
Drinking Places - Alcoholic Beverages	7224	$46,757,427	$50,116,914	-$3,359,487	-3.5	104

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.
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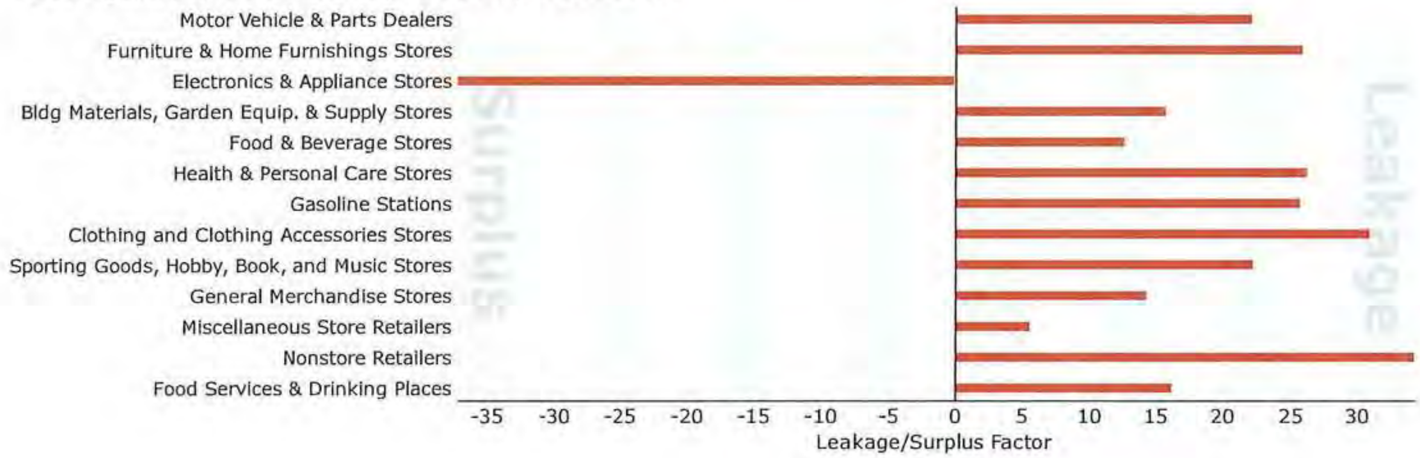
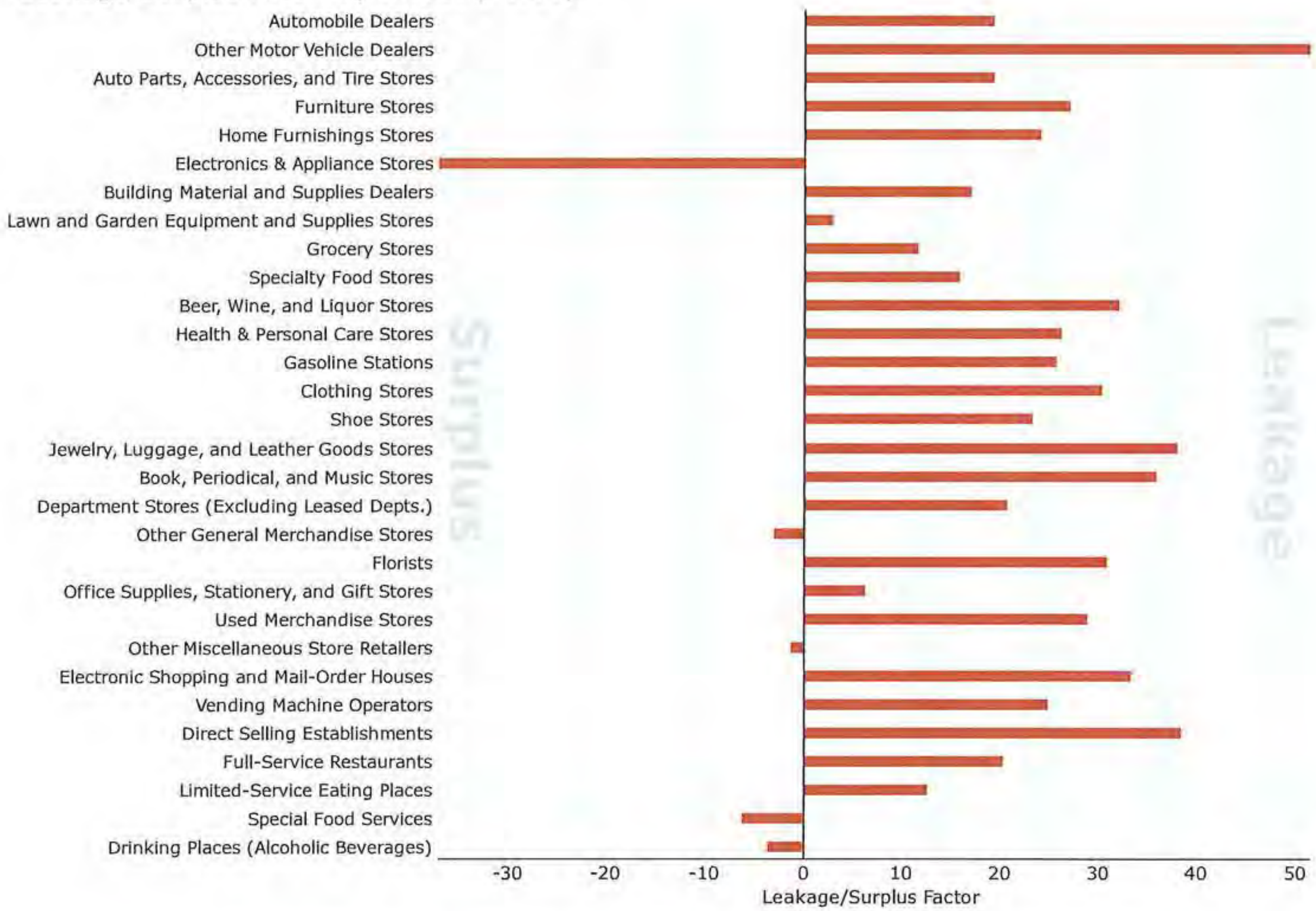
Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



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September 12, 2016