Market Analysis and Implementation Plan

Centreville Main Street District
Centreville, Maryland

JGSCGroup

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Executive Summary

The Main Street District is a walkable commercial area in the heart of Centreville, Maryland. Centreville is the County seat of Queen Anne's county and, as such, hosts the County courts and the offices of several agencies of County government. At its heart is Courthouse Square, a beautiful green plaza that has been a gathering place for Queen Anne's County citizens for more than 200 years. On its western side, is the majestic old Courthouse building; soon, a new Courthouse will face the Square on its eastern side.

Long before malls and shopping centers, Commerce Street was, as its name implies, the place where county residents came to make their daily and weekly purchases: a department store stood at the corner of Water Street and Commerce and every conceivable need, from groceries to clothing, pharmaceuticals, and hardware could be met in the stores along Commerce Street. Over the decades, as retail commerce flourished in outlying areas along County and State roads, the small businesses of downtown Centreville felt the pressure to move to more suburban locations convenient for people in cars. The concentration of residences changed, too, with new homes being developed on former farms outside the town center.

Law offices used to be limited to "Lawyer's Row" along the southern side of the square; now they dominate the downtown landscape, as do other related legal services that pertain to the needs of the court system. Over time, stores and shops gave way to professional offices, forcing people to do their regular shopping elsewhere and to think of Courthouse Square as the place one goes to court.

The area is home to 90 commercial locations. That would seem to be sufficient to meet the needs of the local population; it's about the number of store locations found in a small mall. However, when one considers that the types of businesses in these spaces are largely non-retail government services or professional (legal) services, it is apparent that there is very little left to shop for in downtown Centreville. This is the core problem for downtown Centreville: for all its charm and walkability, the Main Street District lacks the massing of stores and restaurants necessary to attract consumers to the area.

These concerns were confirmed through a survey that received nearly 1,000 responses from residents, workers, and area consumers. The survey results revealed that local residents do not visit the Main Street District because it doesn't offer the types of stores and restaurants they want to visit. Your merchants' stores capture only 7.5¢ of every dollar spent by area residents on retail goods and services. That is a dismal rate; it should be closer to 40% to 50% capture.

> "Town of Centreville Main Street" is an accredited program of the National Trust for Historic Preservation; their status is listed here: http://www.preservationnation.org/main-street/about-main-street/the-programs/main-street-accredited-1-1.html?state=MD . The Town of Centreville operates the program, and it exists to provide support for businesses within the Main Street District, shown on the map on Page 6. The district's boundaries coincide with Centreville's Central Business District zone. In this report, the terms "Main Street District," "Centreville Main Street," "downtown," and "Main Street Area" are used interchangeably in reference to this district.

Restaurants in Centreville do a good job of capturing local spending on dining (almost 44¢ of every dollar spent by people in the 21617 ZIP Code for dining); however, 11% of all people in that ZIP Code told us that they *never* dine in Centreville. This indicates that there is a large potential audience right in town that could be captured for dining, if we knew what would get them to dine here. Fortunately, we do know—they told us in their survey responses. What they want is better quality and more variety. There are simply not enough choices in downtown Centreville for it to be considered a good alternative choice for shopping and dining.

From our economic research, we learned that there is enough unsatisfied consumer demand in the region to support what they want: more stores (in certain retail categories) and more full-service restaurants. The addition of more stores and restaurants would create the retail density—the amount of choices—that your consumers are demanding.

But where could more store and restaurants be located in downtown Centreville? In this report, we propose that current spaces at grade around Courthouse Square that have been given over to non-retail use should be reclaimed as a part of a long-term strategy to create browse-shopping and dining downtown. We encourage the redevelopment of certain nearby corridors to add to the retail density of Courthouse Square and engage sufficient space and mix of stores/restaurants to create a worthwhile shopping experience.

Together with development of new retail space, we encourage development of more residential space above it. Over the past decade, new residential development occurred away from the downtown center at Symphony Village and North Brook. These developments added more car traffic, but not more foot traffic downtown. The net effect on commerce was to pull traditional retailers like the grocery and hardware stores away from the downtown, and to introduce convenience stores and fast food restaurants out near those developments. This was not helpful for downtown commerce. Residential demand continues to grow in Queen Anne's County, and much of it could and should be satisfied within the Main Street District. This will put more "feet on the street" (that is, build more foot traffic) and create a built-in customer base to help support more stores and restaurants.

These development measures are part of a broader strategy that focuses on these measures:

1. Restore Courthouse Square as the center of commerce in Centreville and expand walkable commerce around it as much as possible.
2. Improve access into downtown through better signage, traffic flow changes, and parking.
3. Attract local and regional visitors by growing the series of events that are hosted downtown.
4. Recruit new restaurants into downtown and consider the creation of a "restaurant row."
5. Recruit retail businesses consistent with the sustainable categories of retail identified in this analysis.
6. Create new retail space in and near the Main Street District.
7. New retail space should be designed as mixed-use space with residential and/or office space above the retail space at grade.
8. Create alliance/relationship with Chesapeake College.
9. Explore a cooperative marketing relationship with Chestertown.

All of these strategies are described more in detail in the *Recommendations Section* at the conclusion of this report.

Our report follows, with accounts of our various analyses and conclusions, general strategic recommendations, specific tactical recommendations for recruiting additional stores and restaurants, as well as detailed results of the consumer survey and economic data for Centreville's trade area.

Acknowledgment

We gratefully acknowledge the support of Tim McCluskey, George G. "Smokey" Sigler, and Jim Beauchamp, the members of the Town Council of Centreville; Town Manager Steve Wall; Town Clerk Carolyn Brinkley; the members of the board of the Centreville Economic Development Authority and their Chair, Katherine Magruder, and all of the stakeholders, merchants, commercial property owners, residents, and visitors who participated in interviews with us, or took our community survey, and provided us with the information needed for this analysis.

Finally, we would like to offer special thanks to Centreville's Main Street Program Manager, Carol D'Agostino, for her extraordinary guidance in this process, and for going the extra mile to make sure that we always had whatever we needed to complete this project.

Centreville Main Street area (outlined in red)

Project Background

In January of this year, Centreville Main Street retained JGSC Group to conduct a retail study of the Main Street District. Main Street lies at the heart of downtown Centreville, and its center point is the old Courthouse Square that dates back to 1794. The goal of the retail study is to identify opportunities to recruit new retail stores and restaurants to the Main Street District, and to recommend strategies for revitalizing retail commerce there.

The object of the analysis was the Main Street District commercial area. The study area includes about 30 block facings covering roughly 0.25 square miles (about 160 acres) as shown in the map, previous page. If the center is considered to be the intersection of Lawyer's Row and North Commerce Street, then the district extends no more than one-quarter mile in any direction, making it all highly walkable. Within the study area there are approximately 90 at-grade retail businesses. Most of these are service businesses that do not attract shoppers, and do not contribute to the browse-shopping experience in what is otherwise a beautiful area to walk through.

Study Methodology

JGSC applied our three-part Community Insights® analysis to determine areas in need of improvement, find revitalization opportunities, and identify the most sustainable categories of retail for downtown Centreville. We evaluated three segments of your market: retail infrastructure, community preferences, and economic data. Sustainable retail opportunity is found where those three segments coincide. If any one segment should be lacking, then the desired retail category may not be supported. For example, if a community preference were for a department store, and the economic data indicated sufficient consumer demand to support a department store, but retail infrastructure were lacking (i.e., insufficient traffic or inadequate retail space), then the department store category would not be considered sustainable for the community.

This report will describe the findings of our analysis in the three segments and furnish our recommendations for Centreville Main Street's most sustainable retail categories. These findings can serve as downtown Centreville's plan for retail growth, with all the statistical information the community will need to recruit desired retailers. In essence, Centreville can now become proactive in managing its downtown retail mix by pursuing the retail businesses that the community wants to have and knows it can support.

We call it "growth by choice, not chance" because it allows you to choose what you want based on data about your marketplace… rather than sitting back to see what retailers or developers show up downtown. With market information, you will make the same analysis that major retailers do to determine if your site works for their business.

Data Sources

The economic data in this report was provided from a number of reputable sources including: Bureau of Labor Statistics, DataMetrix, Esri, GfK MRI, Market Planning Solutions, and U.S. Census Bureau. The consumer preferences data in this report was collected via online survey of local consumers by JGSC Group.

Infrastructure/Inventory Analysis

There are 135 total commercial locations in Main Street District. They contain 49 total business categories; these are the top 10 business categories in the Main Street District:

SIC Category	Count	Percentage
Government offices	22	16.3%
Professional – legal	14	10.4%
Professional –medical/dental	11	8.1%
Beauty salons	6	4.4%
Real estate offices	5	3.7%
Insurance agents/brokers	4	3.0%
Accountants	3	2.2%
Bail bond offices	2	1.5%
Architects	2	1.5%
Banks	2	1.5%
Full service restaurants	2	1.5%

In the top ten, there are no categories that sell retail goods. There are three other categories of retail goods vendors in the district with one store each:

- Pharmacy/gift shop
- Optician
- Women's clothing/accessories

Of 135 locations, only 89 locations (65%) offer retail goods, services, or dining:

Category	Count	Percentage
Retail goods	13	9.6%
Retail services	72	53.3%
Prepared meals (restaurants)	4	3.0

The other 46 locations (35% of all commercial locations) are:

Category	Count	Percentage
Non-retail businesses	7	5.2%
Government offices	22	16.3%
Vacant spaces	17	12.6%

The Main Street District seems as though it is not a place to shop or dine because more than one-third of all commercial spaces are devoted to non-retail uses: non-retail businesses (developer offices, or bail-bonds offices), government office space, or vacant space. The rate of vacancy alone is high. At 12.6% of all available locations, it is much higher than the average rate of commercial vacancy for retail space in business districts in nearby western shore counties in Maryland, although it is on par with vacancy for office space[1].

In order to give people a reason to want to shop, dine, and be entertained in downtown Centreville, it will be necessary to add more retail and residential density. There needs to be a greater concentration of retail businesses selling browse-shoppable merchandise, as well as more full-service restaurants to offer variety of dining choices at breakfast, lunch, and dinner meals. New development would allow for the creation of modern retail space that could be configured to meet contemporary retail demands, yet designed to be compatible with the character of the historic downtown. New development could also serve to link Courthouse Square with other retail corridors in the downtown area. For example, a new retail corridor was developed on the west side of Pennsylvania Avenue within walking distance of Courthouse Square. By in-filling potential retail spaces along Water Street, the two shopping areas could be connected into one contiguous, walkable whole.

Any new retail development downtown should be mixed-use development, with residential or office space above the retail space at grade. New mixed-use development with office space could allow for office uses now at grade to be moved to second floor locations, thus preserving the space at grade for retail businesses or restaurants. We identified the following mixed-use development opportunities in or near Main Street District that would strengthen shopping and dining in that district:

[1] In the fourth quarter of 2014, data compiled by Co-Star for the Metropolitan Washington Council of Governments (MWCOG) included these retail and office space vacancy rates:

County	Retail vacancy rate	Office vacancy rate
Charles	13.3%	6.9%
Frederick	12.9%	8.2%
Montgomery	14.8%	4.1%
Prince George	19.1%	5.6%

(Data found here: http://www.mwcog.org/uploads/committee-documents/bV1WXl9a20150317100949.pdf) While data for Eastern Shore or Mid-Shore counties would be more pertinent, it was not available. In the absence of that, the data from these Western Shore counties provides a helpful reference point on regional vacancy.

- **Pennsylvania Avenue – East Side.** This block-side is now unimproved and owned by the Town. It faces a developed block of mixed-use new residential above retail space that was designed and built to conform to the historic appearance of the downtown. Creating stores on both sides of the street would increase retail density and make the block more attractive to foot traffic.
- **Banjo Lane.** Under-utilized; should be two- to three-story mixed-use with storefronts rather than the current mix of under-utilized warehouses and retail businesses in industrial buildings.
- **Turpin's Lane.** Under-utilized; should be two- to three-story mixed-use buildings with retail storefronts linking Banjo Lane to Commerce Street; this would also expand retail commerce northward from Courthouse Square.
- **Water Street** from Liberty Street to Pennsylvania Avenue. This has traditionally been a retail commercial street dominated by a department store, but over the years much of the retail space has been converted to office use, residential use, or vacant space. Some properties here (particularly the building on the NE corner of the Water Street/Commerce Street intersection) appear to have structural issues that place their continued commercial use into question. Redevelopment of this corridor where possible/practical into mixed-use buildings with retail storefronts would allow for increase of both the retail and residential density, create office space on second floors that would allow office uses now at grade to move upward, and link Courthouse Square to Pennsylvania Avenue along a complete grid of streets with continuous storefronts.

Stakeholder Interviews

Starting in January and running through April, JGSC conducted interviews with 37 stakeholders[2] identified by Centreville Main Street and CEDA board as critical individuals with a vested interest in the future of commerce in downtown Centreville. We asked all of them the following questions:

1. How would you describe the relations among the three entities of local government, the business community, and the residents/consumers of Centreville?
2. What would you point out to a potential new store or restaurant operator to be the strengths/weaknesses/opportunities/and threats to doing business in downtown Centreville?
3. What efforts have been made today or in the past to stimulate visits to Centreville by outsiders? Of those, what worked and what didn't?
4. What is your ideal vision for the future of commerce in Centreville?
5. What resources are needed for Centreville to achieve your vision?

Of course, the various responses offered at times provoked follow-up questions, and the intent of the conversation was to determine whether there is consensus among your stakeholders on what would be a desirable direction for commerce to take in Centreville, and whether there is an effort being made to achieve it.

Our interview of the members of the Centreville Economic Development Authority board included other questions in addition to the standard five: we asked what initiatives have they pursued to support or strengthen commerce in downtown Centreville, and how did that fit within the planned economic development initiatives that the Authority has for the Town? We learned that the revitalization of the Main Street District is a top priority for CEDA. They see the downtown as the area where the preponderance of people work; improvements to commerce there will benefit those workers, as well as enhance the quality of life of local residents. They will also benefit all County

[2] The stakeholders interviewed were: Jack Ashley, Chrissy Aull, Jim Beauchamp, Mike Bozek, Greg Callahan, Marge Callahan, Mark Callahan, Ann Cassidy, Lawrence Chanaud, Belinda Cook, Rick Coulby, Val Coulby, Niambi Davis, Liz Draper, Davis Emory, Mark Freestate, Calvin Gray, Jr., Calvin Gray, Sr., Barry Griffith, Heather Guerieri, Shane Johnston, Lynn Knight, Scott MacGlashan, Tim McCluskey, Mike Cogan, Angie Price, Doris Pullman, George G. "Smokey" Sigler, Tina Squibb, Bill Stoops, Greg Torchio, Amy Undercoffler, John Walden, Dee Walls, Steve Walls, and Dan Worth.

residents, who come to Centreville for public school, for sporting events, for the Court, and for other County service agencies.

CEDA board members were asked how they would encourage the downtown Main Street area to be more integrated with the wider community and with Queen Anne's County itself; and they suggested that Main Street could reach out to other community agencies to share their facilities; for example, the Clubhouse at Symphony Village might be a good event space for small catered affairs hosted by Main Street. One problem that Main Street might help alleviate would be to overcome the mindset of resistance to change that residents sometimes have. Many residents want to preserve Centreville as it is, not recognizing that without some growth there may be decay. Unless the economic engine works well enough, a community trying to stay as it is may not be able to afford to maintain itself. Main Street could be the ideal agency to explain to the public the need for better economics in order to preserve the character of downtown Centreville.

With regard to retail space that is older and does not have the ideal configuration for contemporary retail, CEDA board members suggested that these spaces might make good low-rent business incubator locations.

We asked all stakeholders their impressions of the relationships among the three groups that make commerce happen in a community, the business community, the local government that regulates the business community, and the residents/visitors that patronize the businesses. Their responses were evenly divided on the quality of those relations; with half characterizing them in a positive way, and the other half negatively. Oddly enough, the stakeholders seemed to agree on the same points that justified their positive or negative reaction. For example, we heard that local government wasn't traditionally business-friendly, but that the current administration is much better in this regard. We heard that this is a small community, and that business owners do their best to support community initiatives; yet we also heard that many commercial property owners don't care enough about the town to maintain their properties from decay. Another complaint about the business community is that they don't maintain the kind of business hours that they should (open later on weeknights, and on weekends) for Centreville residents to be able to patronize them. We also heard that Centreville is a small town where everyone knows one another and tries to be supportive of each other; yet many residents don't shop or dine in Centreville at all. It seems that Centreville's level of mutual understanding and support is a glass that is either half-full, or half-empty.

When asked what are Centreville's commercial strengths, the most common responses were:

- It is a small town with friendly people and no crime.
- Traffic counts are good on 213 and other roadways.
- It is centrally located to other regional points, from Easton to Annapolis, to DC.
- It is a County Seat that attracts government employees and professionals to work here every day (who shop and dine).
- Commercial rents are reasonable.
- There is room for new development (i.e. Carter Farm).
- The town has heritage architecture, an interesting history, and real charm.
- A good economic development commission to spur investment.
- A great school district that attracts residents.
- Economic incentives to open a business within Queen Anne's County.
- New employees will be coming into the downtown because of the new Courthouse and county offices.
- Our waterfront attracts outdoor recreational visitors.
- Wharf area could be developed into a venue for catered weddings and other events.
- Baseball camp business is a destination that draws families from out of state.
- A YMCA may be developed in town along Route 304.
- Nearby Chesapeake College has a plan to double in size within 10 years.
- The Wye Institute will be bringing aquaculture to Centreville.
- The town is quaint, charming, and walkable.

These were described as the town's weaknesses when it comes to commerce:

- Multiple parking issues:
  - Not enough parking spaces;
  - Parking fine ($20) is too high;
  - Merchants and their workers park in public spaces, reducing available parking to customers;
- Not enough retail space.
- Not enough resident population to support more retail.
- Doesn't attract tourists.
- No movie theater.
- Can't attract franchise restaurants.
- No-growth attitude of residents has caused investment to concentrate in other towns (Chestertown, Easton, Kent Island).

- Cannot support a branded hotel/motel.
- Residents are out of town most of day, working elsewhere.
- Need a dedicated Farmer's Market/Winter Market manager.
- Whenever government offices are closed, town is dead.
- Many commercial properties are poorly maintained.
- Retail business hours don't match with availability of residents to shop.
- Professional offices take up retail space at grade on Courthouse Square—latest example is the bail bonds office that is on the busiest intersection.
- Fire code requires expensive fire suppression investment, which is barring further retail development.
- Current liquor law prohibits liquor licenses within 200' of a public library, which will impact potential restaurant locations on Commerce Street[3].
- New courthouse building will convert some existing retail space into government space, further reducing an already low ratio of retail spaces downtown.
- We don't have enough full-service restaurants, and no health-food restaurants.
- The County has been reluctant to make Courthouse Square available for public event uses[4].
- We don't have lodging places.

Stakeholders saw these opportunities for business in Centreville:

- Development opportunities are many.
- There are many locations in downtown and beyond for development of retail, office, and residential space.
- The town owns the vacant lot on east side of Pennsylvania Avenue—this could be developed to mirror the opposite side.
- Restaurant space at Hillside Motel is vacant and available for lease to a restaurateur.
- Centreville's shops and restaurants could capture new business by marketing to students at Chesapeake College.
- Opening of new courthouse will bring new employees into Courthouse Square.
- The State of Maryland offers a façade improvement grant that would be a way for Centreville to improve appearances, and attract new business[5].
- North Commerce, and North Liberty Streets have commercial opportunities that are under-utilized. We also have historic features that should be included in a historic-tour loop. And we should stop losing historic features: the Providence House (1730) could have made a great tavern/restaurant, but it was sold as a private home.

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[3] The Town Council has asked their legislative delegation to remove the law, or reduce the 200 foot radius.

[4] This stakeholder impression is incorrect in one particular: the entity responsible for management of Courthouse Square is the County Court System, not the County government. The County Court system has been reluctant to make Courthouse Square available for public event uses.

[5] The Town of Centreville has offered this program over the past 3 years and will be coming to a close at the end of June, 2015.

- Centreville has sewage capacity available, and space for an additional treatment pond. We have a spray field designated for 650,000 gallons/day and treatment facility currently designed for 542,000 gallons/day and with future upgrades, can accommodate 750,000 gallons/day. In reality, due to the soil performance at the farm, the capacity of the spray field is likely to be less than 650,000 gallons/day. Upgrades to the treatment facility can accommodate growth; if needed/permitted, we could also increase the spray field area through the use of another farm on which to spray the treated material.
- Zoning was amended in 2014 to allow "air B&B's," which would allow us to offer a form of lodging in town.
- We could support a restaurant row on Route 304.
- Municipal building could relocate to Water Street, to create a leasing opportunity on Lawyer's Row.
- The Public Library will be open on Sundays now, which may stimulate businesses to open on Sundays as well.
- The old Courthouse façade and square could and should be lighted at night, which would stimulate more foot traffic, and in turn, more business.
- Centreville could become a tournament hub for soccer and lacrosse. The County supports this, and planted zoysia grass on school fields to attract those tournaments.

Not many stakeholders saw threats to business in Centreville, but these few were discussed:

- Regional competition is great, and makes it difficult for us to have many retail categories.
- Our residents work outside of town, and they shop and dine while outside rather than in town.
- There is poor media coverage of what we do here.
- Visitors to town usually come for court business, so they associate Centreville with an unpleasant experience.
- Despite being the county seat, Centreville doesn't have any political pull, so choice projects tend to go to other competing towns.
- New development could change the old-fashioned character of the town.
- There is a perception that the County and Town are not helpful to organizations seeking to host events in the downtown—for example, the Rotary's Artisan Festival is held outside of town, rather than in Courthouse Square[6].
- Internet sales will continue to hurt brick-and-mortar businesses.

[6] Town Manager Steve Walls noted, however, that there are buildings at 4H-Park that protect vendors and allow the 4-H event to proceed even in inclement weather.

We asked what is being done, and what had been done in the way of events to attract visitors to Centreville. These events were considered effective:

- The Farmer's Market is considered the most successful event by many stakeholders, although several noted that it needs improvement to be as successful as the Chestertown market.
- Centreville Day is a free family event with a series of fun activities and live music for all ages, but it is served by outside vendors, so local businesses don't get a chance[7].
- Christmas parade attracts 5,000 people, but it occurs at night, after stores have closed.
- The Arts Council Music Series.
- The Arts Councils' "Heck with the Malls" shopping event is very popular in December.
- National Night Out and Music in the Park at Millstream happen at night, away from Courthouse Square[8].
- Taste of Centreville was held once, and attracted restaurants from Kent Island, on a humid summer night; the group that organized the event (Centreville Alive!) is no longer active, but this might be a good event for the Main Street District to undertake.
- Church events at United Methodist (summer and fall festivals) draw a lot of people.
- Corsica River Awareness Day draws a lot of visitors to Bloomsfield Farm, which is outside of Centreville town limits.
- Sports events at the ballpark at Bloomfield Farm off Route 213/Church Hill Road draw people.
- The 4-H Fair and the Rotary's Artisan Festival are good, but both belong downtown where they can help businesses and restaurants[9].
- As to events that Centreville should host, these were suggested:
    - Antiques fair like the one in Brimfield, Mass.
    - Repeat the "Queen Anne Festival" that was done once for the 1976 Bicentennial, and the "War of 1812" commemoration that was held last year.
    - Build a wine-tasting grape festival around the area wineries in Church Hill, Easton, and Kent Island.
    - Weekly events in summer as Chestertown does, including their "First Night Friday."

NOTE: There is a shared concern that there is simply not a strong enough reason to compel people to visit the downtown today: not enough businesses, and not enough variety of restaurants.

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[7] Main Street Manager Carol D'Agostino reports that in fact, vendor opportunities are available to any interested vendor or merchant, but applications are first-come, first-served, and are filled as space permits. A vast majority of vendor participants are from Centreville and Queen Anne's County, if not from downtown Centreville.

[8] However, Town Manager Steve Walls noted that the National Night Out event does occur on Lawyer's Row, which is on Courthouse Square.

[9] Again, we note the earlier comment of Town Manager Steve Walls that the 4-H event utilizes buildings at 4-H Park to house vendors in the event of inclement weather.

The stakeholders were asked what type of business district they thought downtown Centreville should be, and the overwhelming sense was that to take maximum advantage of its heritage architecture, interesting history, and small-town charm, it should be a destination for outside visitors. A few stakeholders felt otherwise; they believe that as a small-town, the business district should be dedicated to the needs of its residents, providing the goods and services that they need on a regular basis. Many pointed out that as the county seat, the community is already designed to host outside visitors for the public schools, court business, and other county services. Some stakeholders suggested that one strategy to attract outside visitors would be to encourage development of the arts downtown.

What was the stakeholders' vision of an ideal downtown for Centreville? The stakeholders would like to see more foot traffic day and night at Courthouse Square, with many more boutique retail stores, restaurants, and fun events. Many feel that Centreville should emulate other older Eastern Shore towns like Chestertown and Easton. Some suggested that the old Courthouse should become a restaurant once it is replaced by the new Courthouse building. The Square should be more for shopping/dining; now it's practically all for lawyers. The downtown should be more for the community. The Public Library will begin a "Yoga on the Lawn" program and they already offer a regular book sale on their front porch; these sorts of outdoor public activities could be done in the Square, too.

Here is a bulleted list of characteristics that the stakeholders would like to see in an ideal downtown Centreville:

- More full-service restaurants of different types.
- A bakery.
- There would be people sitting at sidewalk cafes, and on benches.
- Lots of arts and crafts stores.
- A lot of activity going on in Courthouse Square—it's a beautiful green area that would be a great place to take the kids for fun.
- The downtown would come alive on weekends, rather than be dead, the way it is.
- A natural foods store, in addition to a healthy-foods restaurant.
- There should be shops for tourists; particularly art galleries and antiques stores.
- More restaurants, art galleries, and antique stores. We should be a destination with the feel of downtown Annapolis.
- We should have a college campus in town, as Chestertown does.

- More people living downtown, and trails to connect people that live further out (in North Brook and Symphony Village) to the downtown.
- From April through September it should be bustling on the Square in the evening, instead of all stores closed by 5 p.m. as they are today.
- Like Culpepper, VA with distinctive specialty shops. There would be no national/regional stores or franchises; just boutique stores like "La Belle Maison," a home furnishings store that used to be here on the Square.
- A strong anchor store on the Square;
- More reasonable commercial rents;
- Specially-zoned districts, like a medical services district.
- There is a lack of large meeting venues for things like weddings, conventions, and business meetings anywhere in the County. If Centreville could attract such a venue with hotel rooms and restaurant, that would serve the whole County, and be good for Centreville, too.
- More stores for young families with children (sporting goods, toys, clothing, etc.).
- The look of the town could be cleaner and neater. Coos Bay, Oregon and Sedona, Arizona are very attractive examples of the kind of downtown that we could be.
- Centreville should be like Lewes, Delaware—the town's commerce is tied to local arts and artists.
- More affordable workforce housing – possibly restricted to police/teachers/nurses to encourage them to reside here.

We discussed the matter of resources that may be available to implement their ideal vision, and developed this list:

- Centreville has been designated a "historic area' by the State, making it eligible for historic renovation tax credits.
- More facade grants would be helpful--they have required a 50/50 match, and that prompted repairs of Ashley Insurance; Optical Galleria; Rosendale property; Bay Shore Steam Pot restaurant; and O'Shuck's Irish Pub.
- Other funds:
  - Block grants from Housing & Community Development;
  - "Empower" to retrofit buildings for energy efficiency;
  - Queen Anne's County Economic Development Incentive Fund might apply to capital improvements to retail buildings (more info, contact Jean Fabi at 410-758-1255, and http://www.qac.org/311/Economic-Development-Incentive-Fund
- Fee reduction incentive: Local government should consider a reduction in the connection fees for sewer and water as a development incentive.
- Zoning resources:
  - Consider the creation of an overlay zone that would allow mix of residential and commercial uses in a single area of the downtown. The place to start would be the historic area, but scaled back to where you want revitalization going, at North

Commerce and North Liberty Streets. There are vacant homes that could be businesses. Aesthetics are critical: you can't take a heritage community and allow it to be perforated by non-heritage spaces.

- Downtown Centreville should be re-zoned to allow mixed-use residential above retail, and townhomes--that kind of development could happen on Banjo Lane.

Merchant and Owner Interviews

JGSC interviewed the operators of ten Centreville businesses[10] to discover their perspective on doing business in Centreville. It was a diverse sampling of businesses:

- 3 vendors of retail goods;
- 3 vendors of services;
- 3 vendors of both goods and services; and
- 1 restaurateur.

Most of these businesses have been in town for decades: the longest has been there for 78 years; the newest has only been in town for 3 years. The average length of business in town for these ten businesses was 32.3 years. Each of them clearly has a good grasp on the issues related to doing business in Centreville.

Seven of the interviewed business operators own their business property; the other three rent. Six of the businesses chose to locate in Centreville because it was convenient to home (most of them live in Centreville); only four did so because they perceived a particular opportunity for their businesses.

Only one of the businesses expressed an interest in new space due to changing space needs (that one a renter who would like to move in order to obtain interior improvements that their landlord won't agree to); the others find that their locations meet the needs of their respective businesses.

As to the local economy, four of the merchants found that their businesses are performing at the same level that they did one year before. Three businesses indicated that they have experienced revenue growth this year over last, and two expressed that their revenues have decreased. (One is no longer in business.) None of the merchants were excited about the prospects for the economy, although one merchant saw that their business model was growing revenue beyond expectations because they are meeting a demand that is largely untapped in Centreville for full-service restaurant.

[10] The businesses represented were: Ashley Insurance; Callahan's Gas & Appliance; Commerce Street Creamery; Draper Brothers; Edward's Pharmacy; Hillside Motel; La Belle Maison (now closed); Lynn Knight, Attorney at Law; Serendipidee; and Torchio Architects.

Six of the ten businesses have websites; some that do have websites do not engage in social media. Only six of the businesses capture contact data (address, phone, email) from their customers. From this feedback, it was apparent that the Main Street office could provide a valuable service to its merchants by:

- Helping all Main Street businesses to have a website.
- Linking each business's website to the Main Street website.
- Assisting each business to create a social media site (Facebook is by far the most effective of the various social media at building dedicated customers, and the one source that was selected as most important to Centreville's survey respondents).
- Assisting those businesses that sell distinctive merchandise to do so through Internet sales, to provide an additional source of revenue for them.
- Assist with training each merchant to collect customer contact data, which is the foundation of a low-cost email marketing program; note that merchants that do not normally collect such data as a function of their business could do so via other means (i.e., sign-up to participate in a free drawing for a prize, or for an informative newsletter, or for email notification of special offers; etc.).
- Provide support for tasteful, periodic email blast marketing campaigns to their customer database to stimulate more frequent customer visits.
- Organize cross-promotions among small clusters of businesses following a common theme/promotion so that they may mutually share the benefit of each other's customer database (i.e., "for Mother's Day, find these special gifts at Edward's and Serendipidee at 10% off; and bring your receipt of purchase of any of these items to the Commerce Street Creamery for 10% off a lunch for two").
- Mount an overall marketing campaign that would promote downtown Centreville as a great place to shop, dine, and have a good time via email to all customers on all merchant customer databases. Merchants would not need to release their databases to Main Street or to any other merchant; rather, they would commit to sending out the blast email to their base on an agreed-upon number of occasions per year. The mailing occasions would be consistent with major selling seasons: Valentine's Day, Mother's Day, Memorial Day, Father's Day, Graduation Day, Back to School, Halloween/Thanksgiving, and Holiday/New Year's. Main Street would prepare the campaigns, and distribute the finished emails with instructions to mail them out on a certain date. Ideally, the campaigns would be coordinated with other materials (window signage, banners, ads in weeklies, and "bounce-back" coupons that Main Street merchants would hand-out with each sale good for a discount on a future date).

We asked these merchants what types of businesses they would most like to see as co-tenants of theirs in Centreville. The greatest preference was for more restaurants—even the restaurateur recognized that more restaurants would increase the level of restaurant business for each restaurant. They also expressed a preference for vendors of boutique goods—a baker, a candle maker—and a coffee shop. They do not want to see more service businesses or more non-retail uses in downtown Centreville.

Finally, we asked what suggestions merchants would give to the Town of ways that the local government could improve commerce in downtown Centreville, and they told us:

1. Offer incentives to new business, like:
    a. Property tax rebates
    b. Water/sewer connection fee reduction
2. Institute a new round of façade improvement grants
3. Allow blade signs to all businesses (not just those with on-site parking)
4. Allow 3-hour free parking with no meters
5. Ease costly permitting requirements
6. Create permit packet to guide new businesses through the town's permitting process
7. Allow commercial space at grade for retailers/restaurants only (not for non-retail uses)
8. Create remote parking for merchants and employees only; leave curbside and public parking lots for customers.

Consumer Preferences

In order to determine consumer preferences, JGSC conducted an online survey of area consumers to determine consumer preferences for shopping and dining in the Centreville area. The survey was conducted between February 19th and March 20th 2015. A total of 976 responses were received with a 3.2% margin of error.

Shoppers and Non-shoppers – The survey asked respondents to document the frequency of their visits and spending behaviors in Centreville and elsewhere. Based on this information, we defined "shoppers" as those respondents who visit the stores in Centreville at least twice per month. Respondents that visit less than twice per month were classified as "non-shoppers." We compared responses from shoppers and non-shoppers.

It's important to note that 55% of all respondents are non-shoppers, meaning they shop in the area just once a month or less. And, 75% of all non-shoppers live in ZIP Code 21617 ZIP, which includes and surrounds Centreville.

Residents and Non-residents – Similarly, respondents who said they live in ZIP Code 21617 (which includes and surrounds Centreville) were classified as "residents", while respondents that said they live in another ZIP Code were classified as "non-residents." Again, we compared the responses from these two segments.

Origin of Respondents – We asked a series of questions in order to determine the current and previous home ZIP Code as well as the work ZIP Code of respondents. The responses allowed us to determine the trade area (the area from which the majority of shoppers originate).

Trade area – The trade area is defined as the geographic area from which the majority (70%-80%) of your shoppers originate. Among all respondents, 75% originate from the Centreville area ZIP Code 21617. An additional 3% of respondents originated from each of the following ZIP Codes: 21620 Chestertown; 21623 Church Hill; and 21658 Queenstown. By definition, these four ZIP Codes are the primary trade area for Centreville.

<u>Previous ZIP Code</u> – The responses from non-residents revealed that 18% of non-residents previously lived in the Centreville ZIP Code 21617.

<u>Work ZIP Code</u> – We asked respondents to identify the ZIP Code in which they work. Among all segments, the Centreville area ZIP Code 21617 was the most frequently mentioned with 44% of all responses. Annapolis was the next most frequently mentioned with 8% of all responses. 36% percent of Centreville residents work in Centreville, as do 63% of non-resident respondents. In addition, 65% of non-shoppers, and 53% of shoppers, work in Centreville.

<u>Tenure of residence</u> – 49% or residents have lived in the current ZIP Code longer than 10 years, while 7% have lived here for less than a year. Among non-residents, 61% have lived in their ZIP Code for longer than 10 years, while 4% have lived there for less than a year.

<u>Importance of initiatives</u> – We questioned the survey takers about ten initiatives and asked them to rank each one as to its level of importance. The initiatives included attracting new retail businesses, places to eat and shoppers; revitalizing storefronts and retaining existing businesses, providing more parking, Wi-Fi hot spots, and improved streetscapes.

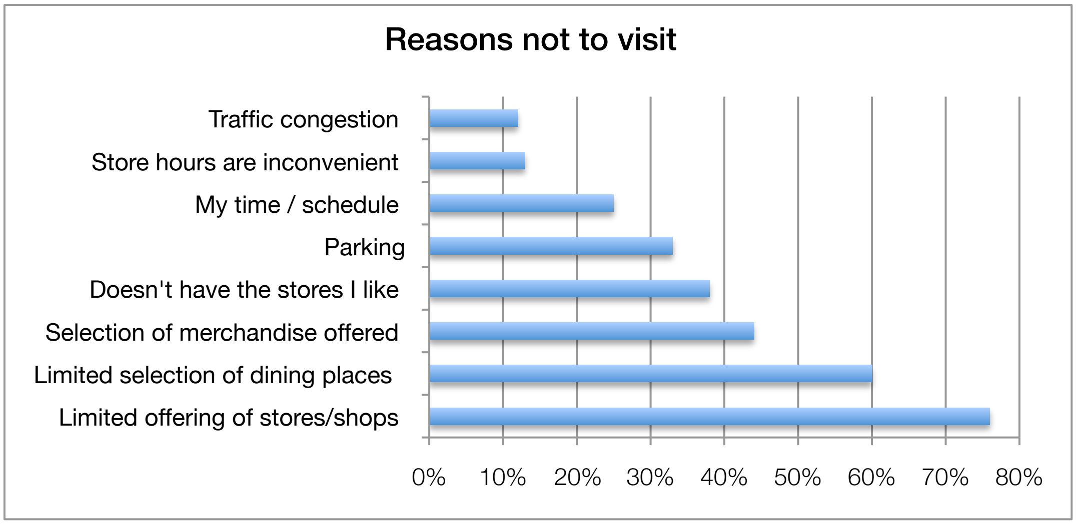
At least two-thirds of all respondents feel it is “very important” to attract new retail businesses, attract more places to dine, and retain the existing businesses. Nearly 6 in 10 respondents think it’s “very important” to attract more shoppers and revitalize storefronts and buildings.

Comparing responses from shoppers and non-shoppers, we found a higher percentage of non-shoppers think it’s “very important” to attract more dining places. This could be a useful way to help convert non-shoppers to more frequent visitors.

Overall, 93% of respondents, 94% of non-shoppers and 93% of residents disagreed with the statement, “Make no changes. Downtown Centreville is fine as it is.”

<u>Reasons to visit/not visit Centreville</u> – We explored the reasons why respondents visit, or don’t visit Centreville. The reason for visiting that was most frequently selected was “dine at the eating places,” which was named by 78% of shoppers, 70% of non-shoppers, 76% of residents, and 70%

of non-residents. The next most frequently selected reasons are non-shopping visits (such as banking or medical visits) was named by 59% of shoppers and 36% of non-shoppers.



The primary reasons why respondents don't visit more often is the limited offering of stores/shops and the limited selection of dining places. "Limited store offering" was named by 73% of shoppers, 78% of non-shoppers, while "limited dining" was named by 57% of shoppers and 64% of non-shoppers. The next most frequent responses were "selection of merchandise" (42% of shoppers and 46% of non-shoppers) and "doesn't have the stores I like" (37% of shoppers and 39% of non-shoppers).

Availability of parking – We measured the perception of available parking by asking if parking was "always, usually, sometimes, rarely, or never" available. There was no discernible difference in the responses between shoppers and non-shoppers, indicating that parking does not hinder shopping/dining visits.

However, we did note that 54% of residents say parking is always or often available, but just 35% of non-residents feel the same. This could indicate that residents think it's easier to find parking because they are more familiar with the area, whereas non-residents have a more difficult time finding parking locations.

Perceptions about downtown – We asked respondents to share their perceptions about downtown conditions including cleanliness, signage, traffic flow and more. Of the nine topics we offered, respondents gave the highest marks to cleanliness of streets and clear directional signage. They gave the lowest marks to the variety of businesses, merchandise/product offering, and the selection of eating-places. Non-shoppers gave lower marks for variety of businesses (65%), merchandise offering (61%), and selection of eating places (55%), than did shoppers. This is a reinforcement of the reasons that are keeping non-shoppers from shopping and dining in Centreville more frequently.

Shopping/dining visits and spending – We examined responses from shoppers and non-shoppers as to their frequency of shopping visits and the amounts they spend per visit. Keep in mind that more than three-quarters of both shoppers and non-shoppers live in the 21617 ZIP Code, so the distinction is not where respondents live but rather how they purchase retail goods and dining.

As shown in the chart below, there is a wide disparity of visits to and spending in Centreville between shoppers and non-shoppers. Shoppers visit 5 times more often and spend 4 times as much in Centreville than non-shoppers. However, shoppers and non-shoppers behave more alike when visiting shopping areas outside of Centreville.

In addition, 61% of non-shoppers say they "never" shop in Centreville.

On an annualized basis, Centreville captures 41% of annual visits from shoppers, but just 6% of annual visits from non-shoppers. With respect to spending, Centreville captures 26% of annual spending from shoppers, but less than 1% of spending by non-shoppers.

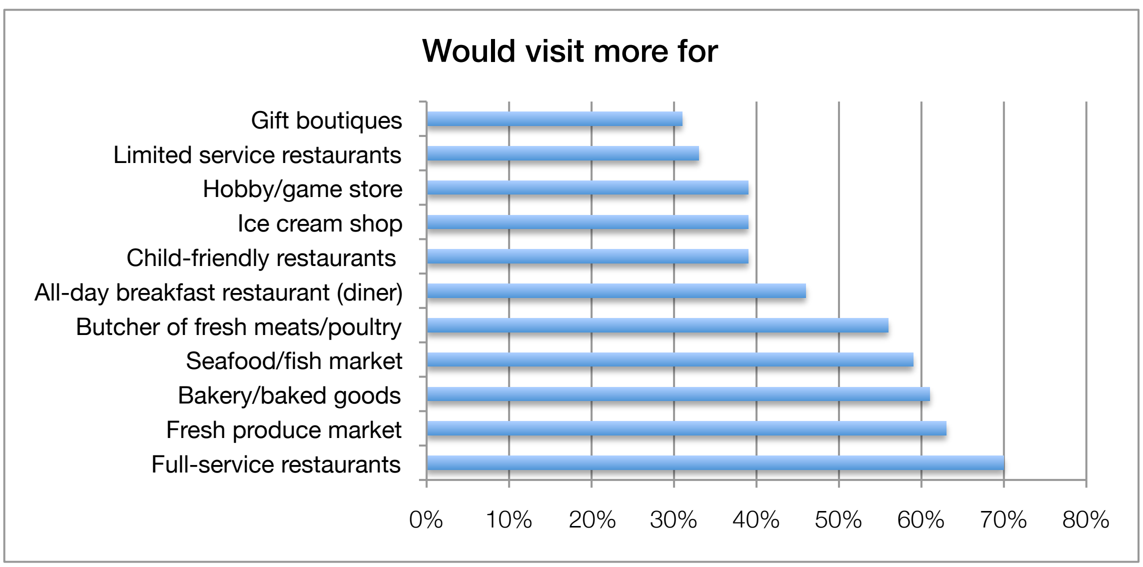
Shopping Visits & Spending	All	Shoppers	Non-Shoppers
Shop here (times/month)	1.8	4.1	0.4
Shop elsewhere (times/month)	6.0	5.8	6.1
Spend shopping here (per visit)	$20.56	$38.03	$8.99
Spend shopping elsewhere (per visit)	$75.33	$75.35	$75.32

There is less disparity among shoppers and non-shoppers with respect to dining, where Centreville captures 45% of dining visits and 40% of dining spending among shoppers, and 31% of visits and

26% of dining spending among non-shoppers. Overall, Centreville restaurants capture just under one-third (31.3%) of the dining spending of area residents:

Dining Visits & Spending	All	Shoppers	Non-Shoppers
Dine here (times/month)	3.2	4.2	2.5
Dine elsewhere (times/month)	5.4	5.1	5.6
Spend dining here (pp/visit)	$17.98	$19.63	$16.98
Spend dining elsewhere (pp/visit)	$23.07	$24.39	$22.21
Never dine in Centreville	11%	6%	15%

Increasing the frequency of visits – We offered 27 categories of retail of shopping and dining, and asked respondents if they would visit more often if Centreville offered more of each. Among all responses, 70% say they would visit more often for full-service restaurants, while 63% named fresh produce market, 61% named bakery, 59% named seafood/fish market, 56% named meat and poultry, and 46% named all-day breakfast restaurant (diner).



When compared to shoppers, non-shoppers gave higher responses for full-services restaurants (73%), bakery (61%), meats & poultry (55%), child-friendly restaurants (42%), and ice cream shop (40%). Non-shoppers also expressed a higher interest in sports/recreation training, consignment boutiques, art classes, dance lessons, music instruments and classes, and karate/martial arts instruction.

It is possible that offering the retailers mentioned in the categories above will attract more shoppers to the area while helping convert non-shoppers into more frequent visitors. Although the responses were not among the highest received, 1-in-5 respondents said they would visit more for doctors, dentists, and eyeglass offices.

Popularity of events – We measured awareness and attendance at 7 events that are currently held in Centreville. We also measured interest in 9 additional possible events.

Among existing events, more than 8-in-10 of all respondents say they are aware of the events. This was almost universally true among shoppers, non-shoppers, residents and non-residents, except that slightly less than 8-in-10 (only 78% of shoppers and 77% of residents) were aware of the Christmas parade.

Among all respondents, 65% say they have attended the Farmer's Market and Christmas parade, while 49% have attended the Fourth of July fireworks. The Two Rivers Bike Ride has been attended by just 18% of respondents.

With respect to possible events, 59% say "yes" they would attend live outdoor concerts, 52% would attend events at the wharf, and 49% would participate in a First Saturday event. The lowest support was received for a storytelling festival and a lecture series.

Value of media sources – We measured the value of 19 media sources by asking respondents to tell us if each was "very, somewhat or not valuable." Among all respondents the most valuable media sources are Facebook (51% very valuable), roadside signs (44%), Google/internet searches (39%), and storefront posters and the Shore Update each with 37%.

Among the remaining sources, town email blasts and the Bay Times are "not valuable" according to 46% of respondents, while 52% say WCEI radio is not valuable. More than two-thirds of respondents don't value Instagram, Twitter, Kent Island Online or Attraction Magazine, while 74%

say Chestertown Spy & Queen Anne's Spy are not valuable, and 81% say the same about the Talbot Spy.

Demographics of respondents – Finally, we collect and compared selected demographic information about respondents, including their gender, age, and income. Compared to shoppers, non-shoppers tend to be younger with more children and higher income levels. Stores, events and activities that appeal to younger families could attract more of this segment.

Among all respondents, 64% are female and have 2.29 adults and 1.43 children in their household. The average respondent is 47.9, with average annual household income of about $118,400.

We compared the demographic information for shoppers and non-shoppers and found that shoppers are older than non-shoppers (46.5 years versus 51.1 years). In fact, when looking at respondents that are 55 years or older, 41% of shoppers meet this criteria compared to just 24% of non-shoppers.

Shoppers also have lower income levels, compared to non-shoppers. The average household income for a shopper is $108,600, compared to $124,400 for a non-shopper. Among shoppers, 47% of households have income of $100,000 or more a year, compared to 57% of non-shopper households.

Both shoppers and non-shoppers have an average of 2.30 adults in the household, non-shoppers have an average of 1.46 children, compared to 1.37 children for shoppers.

Consumer Demand and Retail Leakage

JGSC conducted an analysis of demographic and economic data for the Town of Centreville and surrounding areas. The purpose of the analysis is to measure economic potential in the area, identify growth trends, and determine the economic viability of preferences expressed by consumers in the survey. Specifically, JGSC compiled and analyzed data for the Town of Centreville and compared it to identical data for each of the following areas.

- 3-, 5-, and 10-mile radii
- Zip code of 21617 (the trade area)
- 25-mile radius (the region)

Demographics – We began by examining data related to the local population, households and other demographic criteria.

The Town of Centreville has a population of 4,750 persons in 1,730 households. The population density is 19 times greater than the average for the trade area and 13 times greater than the average for the region. The town occupies just 0.1% of the land area in the region, but 1.7% of the population.

Among Centreville residents, the median age is 40.7 years, compared to 41.4 years for the trade area and 42.8 years for the region. Compared to the trade area and region, Centreville has a slightly higher percentage of children ages 9 or younger.

The annual income in Centreville is $108,500 per household. This is 3% higher than the average for the trade area and 7% higher than the region. Among Centreville households, 44.8% have average income of $100,000 a year or more. This is 1.8% higher than the trade area and 6.1% higher than the region.

An estimated 88.3% of Centreville households have accessed the internet in the past 30 days. This is comparable to the trade area, but 3.8% higher than the average for the region. More than half (52.1%) of Centreville households have accessed the internet via their cell phone, and 47.3% have made a personal purchase via the internet in the past 30 days.

Businesses and employees – There are 425 businesses employing 2,600 employees in town. Although Centreville occupies just 0.1% of the land area in the region, it contains 1.8% of all businesses and 2.3% of all employees. There are 1,070 employees per square mile in Centreville. This employee density is 26 times greater than the trade area and 18 times greater than the region.

We examined the distribution of business and employees by the type of business (retail, finance/insurance/real estate, services, and government. The highest concentration of employees is in the areas of finance/insurance/real estate and government. Centreville is home to 2.4% of all finance/insurance/real estate employees, and 7.0% of all government employees in the region.

JGSC estimates that among all local employees there are 1,524 office workers. A survey by the ICSC (International Council of Shopping Centers) determined that the average office workers spends $90.55 per week on retail goods and services while at work. Of that total, $16.87 per week is spent on dining/lunches at their work location.

Based upon the above numbers, JGSC estimates that local office workers contribute an additional $6,899,910 a year to local economy, of which $1,285,494 is spent directly at full-service restaurants, deli's and other lunch eateries.

Consumer demand and retail supply – JGSC examined consumer demand, retail supply, and leakage (unmet demand) within 28 categories of retail goods and services in Centreville. We then compared this data against identical data for a 3-, 5-, and 10-mile radius, the trade area and the region. The purpose of this analysis is to reveal opportunity for economic growth, within certain categories, in Centreville.

Overall, consumer demand for retail goods and services within Centreville is $76.8 million, but existing retailers have total sales of just $30.7 million annually, resulting in retail leakage of $46.1 million a year among Centreville residents. This does not include the additional spending by the workforce population, which is discussed above. Leakage (unmet demand) grows to $71.0 million annually within the trade area and exceeds $1.4 billion in the region.

Considering retail goods only, leakage in Centreville is $45.5 million a year, and increases to $67.4 million within the trade area and $1.2 billion in the region. This is an aggregated number. The following sections provide more detailed information for the retail categories.

Supply & Demand Total Retail Trade & Food	Town of Centreville	3-mile Radius	5-mile Radius	10-mile Radius	Trade Area (21617 ZIP)
Total Demand	$76,866,782	$112,879,912	$147,565,062	$350,262,917	$169,125.705
Total Supply	$30,704,765	$75,781,910	$139,861,820	$329,070,479	$98,033,673
Retail Leakage	$46,162,017	$37,098,002	$7,703,242	$21,192,438	$71,092,032
Businesses	33	53	86	204	74
Consumer Demand per HH	$44,304	$43,249	$42,637	$41,574	$42,676
Retail Sales per HH	$17,697	$29,035	$40,411	$39,059	$24,737
Retail Leakage per HH	$26,606	$4,214	$2,226	$2,515	$17,939
HHs per Retail Business	53	49	40	41	54
Retailers per Sq Mi	13	2	1	1	1
Avg Sales per Retailer/Year	$930,447	$1,429,847	$1,626,300	$1,613,091	$1,324,779
Consumer Demand per Sq Mi	$31,374,197	$3,994,335	$1,879,810	$1,115,487	$1,489,307
Retail Sales per Sq Mi	$12,532,557	$2,681,596	$1,781,679	$1,047,995	$863,276
Retail Leakage per Sq Mi	$18,841,640	$1,312,739	$98,130	$67,492	$626,031

Inappropriate categories for downtown – Regardless of the results of our analysis, we determined that some retail categories are inappropriate for Centreville's downtown setting, generally because of the type of use, space requirements, parking requirements, or similar criteria. Although they may be appropriate for other areas of Centreville, we determined that the following retail categories should not be recruited for the downtown area.

- Automobile dealers
- Other MV dealers
- Auto parts and accessories
- Building materials
- Lawn & garden
- Grocery
- Gasoline stations
- Department stores
- General merchandise

Categories with surplus supply – As explained above, sometimes a category should be considered for recruitment even though it appears to be over-supplied. We uncovered four categories where this may be true, including furniture stores, home furnishings, health and beauty, and florists.

The furniture and home furnishing categories are both over-supplied throughout the trade area, so it would generally not be advisable to recruit traditional retailers within these categories. It also wouldn't make sense to attempt to situate traditional furniture or home furnishing stores in the downtown area because they require more space than would be available in the existing structures. However, there are exceptions in this category that could work in downtown Centreville: boutique furniture and home furnishing retailers should be considered for the downtown area because they can draw consumers for their unique offerings and typically work well in walkable downtown settings.

The same is true for traditional health and personal care stores. Although this category has retail leakage of $1.4 million within Centreville, it is over-supplied at the 3-mile and 5-mile radii, as well as within the trade area. Clearly, traditional health and personal care retailers such as a pharmacy would not be a good choice for recruitment, not only because of the lack of sufficient consumer demand, but also because of their space and parking requirements. As an alternative, we recommend boutique-style personal care stores such as an upscale cosmetics or perfume store or personal care services that can cater to the local workforce and visitors.

There is minimal unmet demand for florists in Centreville although the category is slightly over-supplied in the trade area. In addition, traditional florists face increasing competition from internet sales. However, consideration should be given variations of traditional florists, such as stores that offer potted plants, specialty floral items, and seasonal arrangements and décor. These types of stores often occupy small spaces (1,000 feet or less) and may appeal to the workforce population, consumers visiting to dine, and other visitors.

Retail Surplus by Category	Centreville	Trade Area	Region
Furniture	($171,166)	($139,040)	$3,166,975
Home furnishings	$724,233	($1,151,552)	$19,196,646
Health & personal care	$1,488,746	($6,915,556)	$144,479,983
Florists	$33,430	($32,643	$1,167,389

<u>Categories with retail leakage</u> – The following categories generally have existing retail leakage as well as other attributes that make them attractive candidates for recruitment to the downtown area.

The electronics/appliance category includes things such as cell phone, computer and appliance stores. As shown in the chart below, there is significant retail leakage within this category. While appliances and big box computer stores aren't appropriate for the downtown area, a cell phone store might be useful in helping to attract consumers to the area. Cell phone stores generally require 1,000 sf of space or less and generally pay rents that are above average.

The specialty food category includes bakeries, fresh produce, meat and poultry, fish and seafood, cheeses, coffee shops and more. This category scored high among consumer preferences in the survey. Generally these types of stores work well in downtown settings and are often operated by local independent owners, as opposed to a national chain. The stores are often 2,000 sf or less and annual sales are often in the $500,000 to $1,000,000 a year range per store. The chart below shows there is little unmet demand for these categories, so a recruitment strategy should include relocating existing retailers, rather than encouraging start-up businesses.

Despite having large amounts of retail leakage within certain categories, the recruitment strategy should focus on smaller independent stores, rather than national name brand stores. This will help preserve the character of downtown while creating a unique shopping experience. Among the categories that fit this description are clothing, shoes, jewelry/luggage/leather goods, sporting goods and hobbies, books and music, gift shops, and used/consignment boutiques. Again, the focus should be on identifying and relocating existing stores with experienced operators. Recruiting start-up businesses should be a secondary option.

In categories where there is significant retail leakage, this should be highlighted for existing retailers and used as an enticement to encourage them to relocate to Centreville. By clustering several retailers in these categories, you will be able to create retail synergy that helps attract consumers to all of the stores in the area, rather than just one specific store.

With respect to categories such as sporting goods/hobbies, and books and music, specialty stores may be more appealing rather than more broad-based stores. For example, a bookstore that specializes in out-of-print or used books is more likely to attract consumers from beyond the trade area. In addition, recruiting smaller retailers will help if the available retail leakage is limited. Consider that a Barnes & Noble bookstore needs between $6 and $9 million in revenues, while an independent bookstore may only need $1 million annually.

The same is true of used/consignment boutiques. A well-merchandised consignment store will be more attractive and inviting than a typical used merchandise stores. Retailers that specialize in sporting goods, furniture, or more upscale clothing should be considered.

Retail Leakage by Category	Centreville	Trade Area	Region
Electronics/appliances	$1,800,941	$4,027,412	$95,808,005
Specialty food	$319,735	$614,495	($2,246,575)
Clothing stores	$3,057,128	$2,532,911	$9,507,361
Shoe stores	$539,755	$1,025,927	$28,445,484
Jewelry, luggage & leather goods	$682,517	$973,252	$18,467,334
Sporting goods & hobbies	$1,260,635	$2,453,175	$48,821,843
Books & music	$399,608	$735,000	$15,861,938
Office supplies & gifts	$553,206	$1,206,966	$18,063,018
Used merchandise	$222,887	$544,413	$4,255,645

Dining categories with retail leakage – We found unmet demand in both the full-service and limited-service dining categories. The difference between the two types of services is defined by whether you eat-then-pay (full-service) or pay-then-eat (limited-service). This supports several key findings from the consumer preferences survey:

- 68% of survey respondents say it's important to have more places to eat.
- 73% of respondents say dining is their primary reason to visit.
- 60% of respondents say limited dining is the main reason to not visit.
- 70% of respondents would visit more if there were more full-service restaurants.

The right number and mix of restaurants can act as a powerful tool to attract consumers from the trade area and beyond. A restaurant row, for example, allows consumers to visit the area without knowing which of the specific restaurants they may visit. Inversely, a collection of unappealing restaurants will do little to encourage repeat visits from consumers.

Average sales for a full-service restaurant are $500,000 to $750,000 a year for small independent full-service restaurants, while national-chain restaurants will often have revenues in excess of $1 million a year. Small independent limited-service restaurants often have revenues of less than $500,000, while national-chains will have sales of double that amount.

Based upon the amount of unmet demand, as shown below, Centreville should be able to support 2-3 new full-service restaurants and an additional 2-3 new limited service restaurants. Existing restaurants that are relocated from within the trade area would not diminish the ability to also recruit new establishments.

Retail Leakage by Category	Centreville	Trade Area	Region
Full-service restaurants	$2,030,483	$5,482,475	$34,718,795
Limited-service restaurants	$975,128	$2,128,937	$84,078,923

Recommendations

In consideration of all of the foregoing research, we recommend these strategies for the revitalization of retail commerce in the Main Street District:

1. **Restore Courthouse Square as the center of commerce** in Centreville, and expand walkable commerce around it as much as possible, through these measures:
    a. Re-capture at-grade space that was originally intended for retail use, and that over time has been given over to office use, so it may be leased to retail/restaurant users again. Priority should be given to retail use in all space at-grade within the Main Street District and incentives should be created to entice non-retail office users out of those spaces and into upper-floor office space—some of which would be newly developed as a further part of this strategy. (See recommendation #7.)
    b. Attract visitors to the downtown by hosting all major events on the green of Courthouse Square. Expand pedestrian space/event space by making Lawyer's Row a pedestrian-only street (make Water Street a two-way street for this to work). (See recommendations #3 and #8 for further discussions of downtown events.)
    c. Take maximum advantage of the historic attraction and architectural charm of the older downtown buildings to create a business district with destination businesses and restaurants. This will become a district that is designed primarily to attract visitors, rather than service daily needs of residents. Under that strategy, a dry cleaning store would be located outside of the district, while a distinctive antique dealer would be located within it.
2. **Improve access into downtown** Centreville, through improved signage, reconsideration of some one-way streets, and better parking arrangements:
    a. Directional signs on Routes 301, 304, 305 and 213 should provide signage to downtown Centreville business district.
    b. Gateway signage should announce arrival into the downtown;
    c. Wayfinding signage within the downtown should guide drivers to parking, Courthouse, library, historic sites, restaurant row, etc.;

d. Directory signs for pedestrians should be located at parking lots and at Courthouse Square.

e. Blade signs should be encouraged in the Main Street area; current zoning allows them only for businesses with on-site parking. They should be allowed for all retail businesses in the district.

f. One-way traffic on Liberty and Commerce Streets ease traffic flows in downtown Centreville during morning and evening rush hours, but are one-way restrictions needed on Water Street and Lawyer's Row? If Water Street could be restored to two-way traffic, would that allow Lawyer's Row to become a pedestrian street with no traffic? The closure of Lawyer's Row to traffic would cost some curbside parking spaces, but would add pedestrian space and comfort to Courthouse Square. That measure, coupled with targeted retail recruiting for the block would allow Lawyer's Row (and Courthouse Square) to regain focus as the center of browse-shopping, dining, and socializing in Centreville.

g. Parking improvements are needed to make it easier for people to shop, dine, and attend events downtown. We recommend:

    i. Emphasize off-street parking rather than curbside, as this will stimulate people to walk through the district, rather than park near the one store they have in mind to visit.

    ii. Signage should direct visitors to off-street parking sites from all gateway entry points into the downtown (Route 213 north and southbound, Chesterfield Avenue, Hope Road, and Water Street). Public parking lots that should be included in the signage program are the public lot on Water Street, the public lot on Broadway (behind the County office building), and the Courthouse parking deck on North Liberty Street (which we understand includes a number of spaces dedicated to the general public).

    iii. Require downtown workers (including merchants and their employees) to obtain permits to park their vehicles. Create a new off-site parking lot for these workers, with free parking to cars with permit stickers. Any cars with employee parking permit stickers should be ticketed if found parked in downtown curbside spaces, or in public parking lots. This would facilitate parking for shoppers.

iv. Encourage visitors to park in off-street public parking lots rather than at curbside by a strategy that makes curbside parking more expensive than parking in the lots; ideally, parking in the lots should be free.

3. **Inventory and promote existing events:** The Main Street District should create a catalogue of all events occurring in or near downtown Centreville throughout the year, including those run by private or non-profit entities outside of government. Consider ways to enhance each event, including a review of whether the event could be relocated to Courthouse Square. Identify past participants and all possible new audience groups for each event, and create/implement a marketing scheme for each event that will promote it to both past participants and potential new visitors on a timely basis. Give each audience at least 30-days advance notice of the event and utilize mechanisms that will solicit feedback and commitment to attend (like Facebook Event posting or email invitations via Eventbrite). Post all events centrally on the Town's website. Also consider the solicitation of sponsors for events that are proven to attract crowds of 2,500 people or more.

4. **Create more events:** Attract local and regional visitors by growing the series of events that are hosted downtown, and move as many events as possible into Courthouse Square. Events should cross a wide spectrum of types, in order to attract the most divergent audience possible over the outdoor season. This will give people of all types a reason to come to Centreville other than court business. They will begin to build a positive impression of Centreville as a charming place with fun things to do. The effort here is to build trial visits of regional consumers of all types and ages, which will raise foot traffic for existing businesses, and facilitate Centreville's recruitment of new businesses.

5. **Recruit new restaurants** into downtown pursuant to our recommended recruitment strategies, (see "Strategies for Recruitment," below). We recommend an early emphasis on full-service restaurant recruitment, as they won't need foot traffic to survive. As dining choices grow coupled with frequent events, foot traffic will grow. As a part of this strategy, we recommend the

creation of a "restaurant row," a place where restaurants of several different types may be clustered together to offer an attractive dining environment with distinctive choices. If they are clustered on or near Courthouse Square, they will be most convenient to the daily Courthouse visitors for breakfast and lunch. At night, they could appeal to locals and other outside visitors for dinner business. Ideally, they would take advantage of shared parking arrangements with the Courthouse, to maximize convenient parking at night.

6. **Recruit retail businesses** consistent with the sustainable categories of retail that were identified in this analysis. The goal should be to seek distinctive destination businesses that are compatible with one another, and that will primarily support browse-shopping of visitors rather than focus on basic needs of residents. (Again, we recommend that the limited retail space within downtown be devoted primarily to destination retail; daily needs of residents may be satisfied in strips and shopping centers outside of the Main Street core like the Food Lion shopping center.)
7. **Add new retail space:** Over the longer-term, create new retail space in and near the Main Street District in order to create the density of retailers needed to offer the level of retail choice needed to make downtown Centreville a viable shopping alternative.
8. **Increase downtown residential density:** As new retail space is planned, it should be designed as mixed-use space, with residential and/or office space above the retail space at grade. Increasing the number of downtown residents adds to the built-in base of shopping and dining patrons. Adding new office space above grade will allow for re-location of office uses now at grade to the new upper floor spaces, thus freeing at-grade space for more desirable retailers and restaurateurs in the browseable space at grade.
9. **Become college-focused by engaging Chesapeake College:** Centreville should act as if it were the host community for Chesapeake College, located a few miles south of Centreville in Wye Mills. Engage the college to move some of its on-campus events to downtown Centreville; for example, its annual Storytelling Festival would be a great two-day event to host in the downtown. Marketing measures could be taken in Centreville to support the linkage—for example, the flying of Chesapeake College banners in the downtown for the College's homecoming week. The students and faculty of the College could also be targeted for the

marketing of events, stores and restaurants in Centreville, as well, and arrangements could be made to create a student debit card that would be eligible for purchases in certain Centreville stores and restaurants. Another possibility would be competitive events that pit students of Chestertown's Washington College against students of Chesapeake College (although their campus is in Wye Mills, their nearest downtown is Centreville). The events would be designed to be entertaining for the public to watch—non-traditional competitions, like swing-dance competitions, beach volleyball tournaments (imagine several tons of sand dumped on Lawyer's Row for the volleyball "court," and concession tents in Courthouse Square), an outdoor stage for a battle of the bands, a glee club competition, or even an ice-carving contest.

Chesapeake College Lady Skipjacks volleyball

10. **Co-operatively market with Chestertown**: Stakeholders and consumers would like to see Centreville become more of a destination for outside visitors, particularly by promoting its historic and architectural charm. Many actually said that they would like to see Centreville emulate the tourism success of Chestertown. Of course, Centreville cannot compete directly with Chestertown; the two are too close together and Chestertown has too many advantages (greater size; hotel & B&B accommodations; more stores and restaurants; direct access to waterfront; it hosts a college) for Centreville to ever be the preferred choice of the tourism audience if asked to choose between the two towns. For this reason, we recommend that Centreville instead try to market itself in tandem with Chestertown and share the tourism audience that Chestertown draws. The two communities might plan a combination of weekend events and incentives that might give visitors added reason to spend the weekend on the Eastern Shore. By marketing a common message together, both towns could expand the reach

of their marketing dollars, reach a wider audience, and create a better, more inviting combined experience than either town could do on its own. This effort would offer enticing trial weekend promotions (i.e., “Come to Eastern Shore for the Plein Air Arts Festival, with artists in Chestertown on Saturday, and nearby Centreville on Sunday” or “Eastern Shore Culinary Weekend: Master chef classes followed by candlelight dinner in Chestertown on Saturday, and seafood brunch in Centreville on Sunday”; etc.). The towns could create a bicycling event—“Tour de Eastern Shore”—with riders biking along Route 213 from one town to the other and accompanying festivities in both towns. By collaborating on combined events, the two communities could stretch an afternoon experience into a weekend-long stay, expanding the potential market of visitors, and increasing the value of their visit.

Strategies for Recruitment

Our research discloses unmet dining and retail demand that could be captured in downtown Centreville; we recommend a recruitment program to attract suitable retailers within the sustainable categories. As a first step, consideration must be given to space required by these categories, and affordability of rents in the Main Street District.

Categories (national retailers)	Space Required	Sales per SF	Examples
Fresh produce food market	1,500 - 3,000 sf	$55 to $450	(local vendor)
Coffee House	500 - 1,000 sf	$150 to $200	Coffee Bean & Tea Leaf, Peet's
Full-service restaurants	1,500 - 4,500 sf	$250 to $575	(Distinctive local operators)
Family Dining	1,500 - 5,500 sf	$450 to $700	Chili's, Buca di Beppo
Home Décor / Accessories	3,000-5,000 sf	$275 to $425	distinctive local (La Belle Maison)

The chart (above) gives examples of the space requirements and sales per square foot for national retailers in selected categories. Most of the retailers shown in the chart are national retailers who prefer to locate in regional malls. They are shown here for purposes of example only; we do not recommend national or regional retailers or franchises for downtown Centreville. The Main Street area does not have the retail density to compete with other shopping centers; it will only attract outside visitors if it can offer businesses that are not found elsewhere. Local and regional retailers will probably require less space and somewhat lower sales per square foot than national retailers.

We also considered the average asking rents for retail space in the Main Street District. Our research disclosed that the commercial rental rate in downtown Centreville is generally between $12 and $14 per sf. Smaller locations are above $12, while warehouse spaces rent for $3/sf triple net. As a rule of thumb, the rent-to-sales ratio for any retail store should be less than10% of sales, and often it should be much lower. For small local and regional retailers, rent should be not more than the following percentage of total retail sales.

Retail category	Rent %
Clothing and accessories	9.0%
Food and beverage stores	3.1%
Furniture & furnishings	4.8%
Eating & drinking places	4.0%
Sporting goods & hobby	3.4%

This means that Main Street District retailers will need to have sales of at least $120 per sf. This should not present a problem for recruiting most retailers. However, it may pose a problem in Centreville when one considers that for the most part, existing retail space is not new; much of it requires upgrades—installation of new HVAC systems, electrical system upgrades, better lighting, refurbished interiors. As some stakeholders and merchants have told us, there is a costly requirement to install sprinklers in improved retail properties. Some even require structural improvements. Unless long-term lease deals can be arranged that spread out the repayment of these costs, it will be necessary for commercial property owners to absorb a large share, or all of these improvement costs. It is the addition of those costs that may push the current average rental up in the $20-$30/sf range and make it impractical for retailers to locate in downtown Centreville.

Restaurants and other eating-places can have sales in the $80-$300 per square foot range. This might present a problem when recruiting, as most non-franchise restaurants (the types that you will recruit) will fall on the lower end of that revenue scale. If necessary, consideration could be given to work with the property owners to see if they would have interest in percentage rent leases. In these cases, the tenant would pay a low base rent, supplemented by additional rent based on an agreed upon percentage of sales above a certain threshold. Clearly, a key element of the Centreville's recruitment effort will be to work with commercial property owners, to identify ones that understand this problem, and will be willing to invest in the improvement of their properties even if the full costs of improvement may not be recoverable over short-term rents. Centreville Main Street can also help by supporting cooperative commercial property owners in their efforts to secure grant funding to make their improvements.

The recruitment effort should be proactive and consistent. We recommend the recruitment effort take place in two flights per year, with each flight lasting 11 to 13 weeks. The spring flight should occur between March and June, while the fall flight should take place between September and November. We recommend a series of direct mail pieces be sent to a targeted list of prospects and that the mailings be followed up with direct outreach via telephone calls.

To be successful, the retail recruitment effort must appeal to a diverse business and consumer audience. Among other things, the effort must achieve the following goals.

- The key stakeholders in the community must agree this is a useful and productive investment that warrants financial support. To a lesser degree, the effort also needs the support of the governing body of the Town and the County, as it will require their ongoing investment.
- Property owners need to be convinced that your recruitment effort can provide them with credit-worthy tenants to fill their retail spaces.
- Real estate brokers must be convinced that your recruitment effort will provide them with ample opportunities to successfully close real estate deals.
- Retailers need to be convinced their stores and restaurants will have a chance of success if they locate in the community.
- Consumers must become convinced that the new stores and restaurants, when combined with the existing retail inventory, create a place that is worthy of repeat shopping and dining visits.

To achieve the above goals, we recommend the following strategies.

1. **Enroll property owners.** Without the cooperation of the property owner, there is no chance of a successful recruitment effort. Property owners are the ultimate decision-makers about what stores and restaurants will occupy their spaces. They also decide the terms and conditions they will offer to retailers.

The process of enrolling property owners into the recruitment effort could be facilitated through group or one-on-one meetings. We recommend that you begin by inviting all owners of retail space to a meeting. Don't be discouraged if only a handful respond to your invitation, as these are likely to be the most cooperative owners. Plus, through their participation, these owners will help encourage others to participate in the program.

The primary goal of the property owner is to secure a lease that will allow them to service their debt and secure a return on their investment. When it comes to leasing to retail tenants, property owners can be more interested in "when" and "how much" than "who" they secure as a tenant. You'll need to re-educate them about the benefits of an ongoing recruitment program that can become a resource of prospective tenants for them.

Property owners may also be resistant to participating because they fear they'll lose control over the leasing decisions for their property, or because they think it will cost money or take longer to lease their property. Some simply don't like change and won't see a need to do things differently. It will be important to make sure they understand that they will retain control of the leasing decisions, and that there is no cost for participation. Finally, you'll want to impress upon them that the recruitment effort can actually increase demand for retail space in the Main Street District, thereby helping to increase opportunities for leasing.

When meeting with property owners you should stress the benefits that the retail recruitment effort will provide. Those benefits include the following.

- Recruit targeted retail stores and restaurants to create a more desirable destination for shoppers and a more rewarding environment for business and property owners.
- The launch of a marketing campaign, at no cost to the property owner, to create awareness about leasing opportunities within the Main Street District and to help attract retailers.
- Provide to property owners and/or their brokers with listings of pre-qualified retail prospects, at no cost, to help recruit retail tenants for their properties.
- Provide property owners with the data and information from a recent retail study that can help convince prospects to lease/buy space in the Main Street District.
- Provide listings on Centreville's website to help promote available properties.

At the property owner meeting, you should, as a minimum, review the following topics.

- Provide property owners with an overview of the retail recruitment effort. Explain why Centreville Main Street believes it is important and share your goals.
- Provide an overview of the retail analysis, which was conducted by Centreville Main Street and JGSC Group, so the property owners understand the validity of your strategies and the information you will distribute to brokers and prospects.
- Explain your strategy for creating awareness among retail prospects and provide examples of the marketing materials that you will use.
- Provide a timeline of events for the recruitment process so property owners know what to expect and when to expect it.
- Describe how property owners and/or brokers can participate in the recruitment process and explain the support that Centreville Main Street will provide to them.

At the conclusion, ask the property owners in attendance to participate in the program. Offer to meet with each of them individually to review their available spaces and answer any space-specific questions they may have. During this meeting, try to ascertain the following information about each retail space:

- Will the property owner cooperate with the recruitment effort and make their space available for lease or sale? If using a broker, will they tell the broker to cooperate with your recruitment effort?
- Is the property in “retail ready” (broom-clean) condition?
- What are the terms and conditions for the property including permitted uses, asking rent/sales price?
- Are pricing and other terms reasonable? If not, can you educate the property owner about the realities of the market?
- What other attributes are offered with the property? For example, does the space include off-street parking, HVAC, basement, kitchen equipment, etc.?

Once you have enrolled an initial group of properties into the program, you should conduct site visits so you understand the layout and any nuances about the spaces, and confirm the readiness of each space for visits by potential retailers.

It's important to continue to build and maintain relationships with the property owners. Over time, as these relationships are strengthened, you'll enroll more property owners into the recruitment effort, which will improve results.

We recommend that you communicate regularly with property owners to keep them informed of and interested in the progress of the recruitment effort. We suggest sending a letter once every 90 days to provide this information. We also recommend that once or twice a year you host a property owner meeting where everyone can share thoughts and comments.

It's also a good idea to stop by and visit with property owners as circumstances permit. A quick friendly visit can help keep you informed about the property, while strengthening ties with the property owner.

2. **Enroll real estate brokers.** Commercial real estate brokers play an important role in the success of retail recruitment within commercial districts, especially downtown areas like the Main Street District. It is essential that brokers perceive the Main Street District as a vibrant, desirable location for retail stores and restaurants. If brokers hold that perception, they'll want to do deals here, if not, they'll encourage prospects to look elsewhere.

   Brokers may be hesitant to cooperate because they view your efforts as competition or interference. To overcome this concern, you should quickly explain that you will not provide brokerage services and that your goal is to assist them, not to compete with them.

   Additionally, brokers will need to be comfortable with your conclusion about the types of businesses that should be recruited to the Main Street District. As their ability to earn income depends upon the validity of your recommendations, they'll want to be assured that you've done your homework. To provide assurance, make sure to cite the sources of your recommendations, such as ESRI data, JGSC Retail Analysis, etc. As brokers become convinced that you can offer insights that are unavailable elsewhere, they'll begin to follow your recommendations and rely upon your information.

You should identify the commercial brokers who are active in the area and who might be able to assist with the recruitment effort. Although there are many ways to identify brokers, the following methods should provide a sufficient list.

- Ask your property owners which brokers they would recommend for commercial real estate services.
- Look for real estate signs in the area, such as "for sale" or "available." From the sign, record the contact information including the name of the firm and the broker's name.
- Review area real estate magazines and newspaper sections to find the names of brokers that are doing deals similar to what may occur in the Main Street District.
- Visit similar communities such as Church Hill, Chestertown, and Easton to see which brokers are representing property owners in those areas.

Proactively reach out to all the brokers on your list. Send them a letter or an email that tells them who you are and your goals for the Main Street District. Invite them to contact you if they have questions or want more information.

Create a one-sheet handout that summarizes the recruitment effort and explains your goals, the retail categories you want to recruit, and a snapshot of findings from the retail analysis. Make this available as a PDF file on your website and send it to any broker that makes an inquiry for more information.

From time-to-time, you should host a broker event and invite all the brokers on your list. We recommend that you do this up to four times a year (March, June, September, and December). An easy way to invite brokers is to use Eventbrite. A sample Evenitebrite invitation is included in the Appendix. Here are some things to do to get brokers to attend your event:

- <u>Make it convenient.</u> Hold the event when it is most convenient for brokers. For morning events, we recommend Tuesday, Wednesday, or Thursday between 8:30 a.m. and 10:00

a.m. For evening events, we recommend Tuesday, Wednesday, or Thursday from 6:00 p.m. to 8:00 p.m.

- Make it relevant. As part of your invitation, make sure you tell the brokers how this event is relevant to them. For example, include language that says, "Find out what's happening in Centreville's Main Street District. And get a list of the retail and restaurant prospects we'd like to see in the Main Street District, together with all the information you need to attract them here."
- Make it opportunistic. Once or twice a year, perhaps in spring and/or autumn, expand the broker event to include a tour of available properties. The tour allows you to showcase retail ready properties and provide brokers with a list of pre-qualified prospects for those properties. The goal is to make it easy for brokers to recruit the prospects that you most want to fill the available spaces.
- Make it enjoyable. Don't drone-on with long-winded speeches. Instead, simply convey the message that the Main Street District is the next hot place to be. Leave the more mundane (and boring) details to your marketing materials and handouts. Make certain you include a free breakfast or cocktails and hors d'oeuvres. Brokers are busy people and allowing them to combine getting something to eat and a meeting will result in higher attendance.

As you have success working with brokers, make sure you communicate those success stories at the next broker event. By showing brokers that you've done the hard work for them – and that they can be successful closing deals in the Main Street District – you'll have a great resource for your recruitment effort.

3. **Recruit retailers and restaurants.** Once you have gained the cooperation of your property owners and local brokers, its time to launch the retail recruitment effort. Following are the key components of the retail recruitment effort.

   a. **Target retail categories.** The retail analysis revealed economic opportunity among several categories:

      1. Electronics/appliances ($95 million in regional unmet demand);
      2. Limited service restaurants ($84 million in regional unmet demand);
      3. Sporting goods/hobbies ($48.8 million in regional unmet demand);

4. Full-service restaurants ($34 million in regional unmet demand);
5. Shoe stores ($28.4 million in regional unmet demand)
6. Jewelry/luggage/leather ($18.4 million in regional unmet demand);
7. Office supplies/gifts ($18 million in regional unmet demand).

We propose that your recruitment effort should target full and limited-service restaurants to begin, as they can survive best without foot traffic, and a cluster of attractive restaurants will build foot traffic, and subsequently pursue the retail goods categories. We would urge that you disregard the shoe store category for downtown; a shoe store needs to be clustered with other clothing and accessories stores; they do not perform well as the only clothing/accessory store in a business district.

We would encourage recruitment of a sporting goods store (to support the large regional audience for outdoor recreation and athletic activities). Also, the recruitment of hobby stores would be consistent with the goal of attracting distinctive boutique shops that could appeal to the existing regional market, as well as to any future tourism you may build.

We also note that collectable objects—art, antiques, old books, etc.—are not a measured retail category, but they do perform well in areas that have significant unmet demand for gift stores (as you do), and that attract moderate levels of tourism; particularly historic tourism. Centreville does not today attract tourism; however, our recommendation that the community partner with Chestertown to jointly market to the historic tourism audience may prove to be a mechanism that will allow Centreville to attract the historic tourism that would support antiques stores and art galleries.

b. Retail prospects. Create a list of retail prospects within your recommended categories of retail. Your listings should take into consideration the following criteria:

   i. Geography – National retailers, if any, should have expressed an interest in the Maryland—and ideally, Eastern Shore—market. For regional retailers, we recommend those that are currently operating in the Washington, D.C.

Metropolitan Statistical Area. For local retailers, we recommend that they have an existing store within a 45-minute drive of Centreville.

ii. Space requirements – The average retail space is between 500 and 2,000 square feet. Currently, we estimate that there are no retail vacancies larger than 1,500 SF. To attract retailers needing larger space, it will be necessary to develop new space in the Main Street District.

iii. Creditworthiness – Most national retailers are publically traded, credit-worthy tenants. For local and regional retail prospects, we recommend that you review their reported credit score and try to select only those with a credit score of "B-" or above. NOTE: This does not replace the need for the property owner to examine the credit rating and exercise due diligence in selecting tenants.

iv. Years in business – Again, most national retailers will have been in business for a sufficient period of time. For local and regional retailers, we prefer those that have been in business at least 3 years.

v. Number of locations – For local and regional retailers, we prefer those prospects that already have at least two store locations. If a retailer is a particularly desired prospect, but they have only one store location, then the strategy should be to re-locate them, rather than asking them to open an additional location.

vi. Co-tenant and other preferences – As we have already noted, we would recommend against the selection of national retailers for Centreville Main Street; however, should you choose to recruit them, note that some national retailers have very specific requirements about the co-tenants they prefer, the types of settings in which they will locate (lifestyle center or downtown, for example), and other preferences. In compiling your list, you should select only those national retailers who preferences aligned with what the Main Street District has to offer. Their preferences are expressed within their listing on commercial listing services such as Plain Vanilla Shell and DealMakers. A sample listing is shown, below:

Urban Outfitters, Inc.

5000 South Broad Street
Philadelphia, PA 19112

Phone: (215) 454-5500
Fax: (215) 454-5163
Website: www.urbanoutfittersinc.com
Corporate Email: service@urbanoutfitters.com

Public Company	Y		
Stock Symbol	URBN		
Market	NASDAQ		
Online sales	Yes		
Total stores	492		
Operating or trading name/Stores/GLA	Anthropologie	182 stores	9,000 - 12,000 sq. ft.
	BHLDN	2 stores	
	Free People	83 stores	2,500 - 4,000 sq. ft.
	Space Ninety 8	1 store	
	Terrain	2 stores	20,000 sq. ft.
	Urban Outfitters	222 stores	9,000 - 15,000 sq. ft.
Preferred GLA	2,500 - 20,000 sq. ft.		
Retail classifications	accessories, apparel - men's, apparel - women's, art/collectibles/frames, home decor/lamps/drapes		
Locations considered	enclosed super regional mall, pad site/outparcel, lifestyle center, mixed use center, downtown/central business district, freestanding		
Percent of stores in centers or malls	20-39		
Preferred co-tenants	fashion-oriented, entertainment, upscale		
Number of new units planned	2014: 25 - 30 2015: 25 - 30		
Preferred lease terms/renewal options	10 yr. w/2 5-yr. opt.		
Minimum frontage	45 feet		
Special requirements	High ceilings		
Core customer income level	Mid, High		
Core customer age	Teen, Adult		
Core customer gender	Female		
Year end sales	01/14: $3,086,610,000 01/13: $2,794,930,000 01/12: $2,473,801,000		
Area(s) of operation (number of stores)	AL, AZ, CA, CO, CT, DC, FL, GA, HI, IL, IN, KS, LA, MA, MD, MI, MN, MO, NC, NJ, NV, NY, OH, OR, PA, RI, SC, TX, UT, VA, VT, WA, WI, Canada		
Area(s) targeted for expansion	All USA, Canada		
Number of Stores Outside North America	9		
Countries with operations (stores)	Belgium(1), Denmark(1), Germany(1), Ireland(1), Sweden(1), United Kingdom(4)		
Countries targeted for expansion	Denmark, Ireland, Sweden, United Kingdom		
Seeking disposal of excess space	no		

Company Executives
Chairman/President/CEO: **Richard A. Hayne**
President, Free People: **Margaret Hayne**
President, Terrain: **Wendy McDevitt**
President, Urban Outfitters North America: **Trish Donnelly**
CEO: **Tedford Marlow**
CFO: **Frank Conforti**
CEO, Anthropologie Group: **David McCreight**
Chief Development Officer: **David Ziel**
Secretary/General Counsel: **Glen Bodzy**
Director, Merchandising: **Mary Coffey**

Leasing Agents/Real Estate Contacts

The McDevitt Co.:
Contact: Wade L. McDevitt
1809 Walnut Street
Suite 400
Philadelphia, PA 19103
Phone: (215) 665-0060
Fax: (215) 665-0068

Source: Plain Vanilla Shell

c. **Marketing materials.** You'll need to create marketing materials to promote the available spaces in the Main Street District, as well as promoting the Main Street District itself. The goals of the marketing materials should be to create awareness and stimulate interest in retail opportunities within the Main Street District.

Marketing materials do not have to be fancy or expensive, but they must be effective. Effectiveness is measured by the marketing materials ability to deliver your message in a way that creates awareness and stimulates interest in the Main Street District. We've included samples of marketing materials that have been proven effective in creating awareness and interest.

There are two types of marketing materials: outbound and inbound. Outbound marketing materials are tools that you use to create awareness and stimulate interest in the Main Street District. Examples include letters, postcards, signage, emails, events, and similar tools. Inbound marketing materials are tools to convey more information to interested parties. Examples of inbound materials are property fact sheets, brochures, websites, Facebook, etc.

i. Outbound marketing materials – We recommend creating a series of two postcards and two letters (with a fact sheet about the Main Street District) and mailing those materials to your prospect list over a 7-week period (one piece every two weeks). We recommend direct mail as the primary outbound marketing strategy, since your target prospects are known by name and address. Using mass marketing vehicles, such as magazine advertising, will not be as effective in reaching the specific prospects you're trying to reach and will result in inquiries from retail prospects that don't meet your recruitment goals, diminishing the effectiveness of the recruitment program. Your materials should stress the points of greatest advantage to retailers that Centreville can claim, based upon the findings of this report. For example, car counts on key roads, levels of unmet demand in your most sustainable categories, and preferences expressed by your consumers in the survey.

ii. Inbound marketing materials – As retail prospects and brokers become aware of the Main Street District, they'll ask for more information about the area as well as specific retail spaces. To address these inquiries, you should produce the following materials.

- A fact sheet that provides an overview of the Main Street District and includes information about consumer demand, retail leakage, new developments, nearby assets.
- A fact sheet for each of the available properties that summarizes the information from the Main Street District fact sheet and provides specifics about the property such as location, size, asking rent, general terms, nearby co-tenants, etc.).
- A web-page or social media page that provides maps (access, parking and other assets) of the Main Street District, details about each of the available retail spaces, listing of upcoming foot traffic generating events and activities.

d. Recruitment outreach. While outbound marketing can be effective in creating awareness and stimulating interest, it is not always effective in bringing prospects to the Main Street District to tour specific properties. To achieve site visits, we recommend a recruitment outreach effort that begins immediately following the direct mail program.

The outreach program should have a goal of reaching the contact person at each retail prospect and determining their level of interest in opening a store or restaurant in the Main Street District. You should be prepared to make as many as 4 telephone calls to each prospect on your list, and expect that this effort will result in contact with 70% to 80% of the prospects. As a rule of thumb, calling 200 retail prospects requires nearly 550 telephone attempts and will result in contact with about 155 to 160 of the prospects.

As contact is made with each prospects you should explain who you are and that you represent the Main Street District. Ask if they've been receiving the postcards and letters you've been sending. (This will help gauge the effectiveness of your outbound marketing efforts.) Also ask if they think they currently have, or expect in the future to have, any interest in retail space in the Main Street District. Ask if they have any other questions that you might be able to answer.

For prospects that express immediate interest, attempt to engage them and learn more about their space needs and other interests. Ideally, you'll be able to arrange a tour of available retail spaces in the Main Street District. For prospects that express potential for future interest, find out when you should follow up with them and create a tickler file to remind you to contact them at some future date. For prospects that have no current or future interest in locating in the Main Street District, attempt to understand the reason behind their statement. It may be that they have no need, in which case you should remove them from the prospect list. But, it could be they're mistaken or misunderstand the opportunities offered by the Main Street District. In this case, you should attempt to correct the misinformation in an attempt to create a potential prospect for the future.

Once you have completed a mailing and telephone cycle, you'll want to refresh your prospect list in preparation of a new outbound marketing and outreach effort in the coming spring or autumn season. Through a proactive, ongoing recruitment, brokers and retail prospects will gain a high level of awareness about your district and your efforts, and this heightened awareness will create more interest and more inquiries.

4. **Generate foot traffic.** It is often said that "rent is a function of sales," meaning that retail rents are dependent upon their ability to produce foot traffic and sales. The more foot traffic and potential sales there are in a given location, the higher the rents that can be charged by the property owner.

   As new stores and restaurants open within the Main Street District, you'll want to promote them and help to draw foot traffic to the area. This, in turn, will generate sales for existing retailers and help attract even more retailers and shoppers into the area.

Following are suggestions for ways in which you can help to generate additional foot traffic for the stores and restaurants in the Main Street District.

a. Create trial visits – Events that allow shoppers to "try it on for size" are a great way to generate new foot traffic and allow shoppers to decide if they want to come back again. Many communities offer a restaurant week event, which is a great way to generate trial visits that encourage visitors to come back for more.

b. Extend event visits – In addition to using events to attract shoppers to the Main Street District, there are things you can do to extend the visit. For example, schedule the tree lighting for 8:00 p.m. and have the retailers and restaurants offer "specials" for 2 hours before and after the tree lighting. Or schedule events during non-peak retail times, such as Tuesday evening or Sunday afternoon, to help bring traffic into the Main Street District.

c. Increase store visits – In a typical shopping mall, consumers shop in 3.5 to 4.0 stores per visit, but in a typical downtown, the number of stores shopped drops to 1.1 stores per visit. Theoretically, if you could get shoppers to shop at 2 stores per visit, you would double local retail sales. To encourage shoppers to visit multiple stores:

   i. Ask retailers to cross-promote with other stores. As an example: Get a free dessert (or other offer) at a participating restaurant when you present a validated coupon from another retailer. You can drive the traffic by making the offer good for the same day only.

   ii. Have retailers participate in a sweepstakes type event where the shopper can enter as often as they like, but only once in each store. This will help increase the number of stores visited.

   iii. Create a series of themed activities or events that take place in multiple locations throughout the Main Street District. As shoppers participate in the event, they'll been drawn past or into the stores of participating retailers.

d. Stimulate return visits – Ask stores to consider using "bounce-back" offers to entice shoppers to return to the Main Street District more frequently. Bounce-back offers can be discounts or special offers that are only valid for a specific period of time (7 to 10 days from the date of the original visit, for example).

e. Share customers – Stores often have unique customers. For example, if 3 stores each had 100 customers, there may be a total of 200 unique shoppers among that group. As a result, stores can help each other and create additional foot traffic by helping to promote events and activities at other retailers in the Main Street District. An inexpensive way to promote these events would be to produce a flyer that lists all the upcoming events, sales, and specials at participating retailers. Each retailer could hand a flyer to their customers, or just stuff one in each shopping bag.

APPENDIX A

Business Inventory

CENTREVILLE MAIN STREET DISTRICT
Business List

COUNT	Retail goods	Retail service	Restr	Not Retail	Gov't	Vacant	Name	Address	SIC Description	SF Descr
1				1			Gray Developers Inc	106 Banjo Ln	Real Estate Developers	Up to 999
2		1					Corsica River Mental Health	120 Banjo Ln	Physicians & Surgeons	5,000 to 9,999
3		1					Crossroads Community Inc	120 Banjo Ln	Mental Health Services	10,000 to 49,999
4	1						Sure Good Vapes	204 Banjo Ln #A	E-cigarette store	
5		1					C Ridgely Kelly Chair & Cabinet Maker	204 Banjo Ln #B	Furniture-Designers & Custom Builders	Up to 999
6	1						Daves Sales & Service	204 Banjo Ln #G	Lumber	5,000 to 9,999
7		1					Middleton Tax Service	204 Banjo Ln #H	Accounting, Auditing & Bookkeeping Services	Up to 999
8	1						Tri-County Office Equipment Inc	204 Banjo Ln	Computers	Up to 999
9		1					Kirby & Associates	206 Banjo Ln	Surveyors-Land	Up to 999
10		1					Ware It's At Custom Auto Refinishing	206 Banjo Ln	Automobile Body Shops	1,000 to 4,999
11		1					Tents for Rent	206 Banjo Ln	Tent rentals	
12				1			Richard Hammond Builders	206 Banjo Ln	Construction contractor	
13		1					CASA for Children	206 Banjo Ln	Childcare services	
14	1						Fit for the Kingdom T-Shirts	206 Banjo Ln	T-Shirt printer	
15		1					B&M Glass	206 Banjo Ln	Glass repair	
16		1					W&L Rentals	206 Banjo Ln	Equipment rental	
17		1					Ronald B Greene Law Offices	219 Banjo Ln	Attorneys	Up to 999
18		1					BB&T	102 Broadway	Banks	Up to 999
19		1					East Coast Bail Bonds	108 Broadway	Bonds-Bail	Up to 999
20		1					Richard C Graves CPA & Associate	110 Broadway	Accountants	1,000 to 4,999
21				1			Queen Anne's Record-Observer	114 Broadway	Newspaper	1,000 to 4,999
22						1	VACANT	118 Broadway	N/A	
23					1		Licensing & Registration Service	120 Broadway #6	State Government-Licensing & Inspection	Up to 999
24					1		Maryland Dc Msc	120 Broadway	State Government Offices	5,000 to 9,999
25					1		Maryland State Clerk's Office	120 Broadway	State Government Offices	1,000 to 4,999
26					1		Queen Anne's County Social Service	120 Broadway	State Government-Social Human Resources	10,000 to 49,999
27					1		Queen Anne's Court Commissioner	120 Broadway	State Government Offices	5,000 to 9,999
28					1		Goodwill Fire Co	212 Broadway	Fire Departments	10,000 to 49,999
29		1					Charles Neville Associate	223 Broadway	Custom boat designer	Up to 999
30		1					All Out Bail Bonds	102 S Commerce St	Bonds-Bail	Up to 999
31	1						Edwards Pharmacy	102 S Commerce St	Pharmacies	5,000 to 9,999
32		1					Henley & Henley	102 S Commerce St	Attorneys	
33		1					Lighthouse Christian Counseling	103 S Commerce St	Counseling services	
34		1					Rosendale	104 N Commerce St	Real Estate Agents & Managers	1,000 to 4,999
35	1						Serendipidee	106 N Commerce St #1	Gift, Novelty & Souvenir Shops	Up to 999
36		1					Ashley Insurance	107 S Commerce St	Real Estate Agents & Managers	1,000 to 4,999
37		1					Ashley Premier Properties	107 S Commerce St	Real Estate Agents & Managers	Up to 999
38		1					Wye Financial & Trust	109 N Commerce St	Trust Companies	1,000 to 4,999
39		1					CNB	109 N Commerce St	Banks	10,000 to 49,999

COUNT	Retail goods	Retail service	Restr	Not Retail	Gov't	Vacant	Name	Address	SIC Description	SF Descr
40			1				Commerce Street Creamery	110 N Commerce St	Ice Cream Parlors	1,000 to 4,999
41			1				Colosseum Pizza	112 N Commerce St	Pizza	Up to 999
42		1					Salon Heberto	114 S Commerce St	Beauty Salons	1,000 to 4,999
43	1						Callahan's Gas & Appliance	116 N Commerce St	Household Appliance Stores	1,000 to 4,999
44		1					J Connolly Michael CPA Chartered	118 N Commerce St	Accountants	Up to 999
45					1		Queen Anne's County Free Library	121 S Commerce St	Library-Public	1,000 to 4,999
46			1				O'Shuck's Irish Pub	122 N Commerce St	Restaurants	5,000 to 9,999
47				1			Historical Society Queen Annes County	124 S Commerce St	Museums	Up to 999
48		1					J Thompson Elmer Jr	124 N Commerce St	Attorneys	Up to 999
49		1					Thompson & Thompson	124 N Commerce St	Attorneys	1,000 to 4,999
50		1					Chesapeake Title Group	124 N Commerce St	Title Insurance	1,000 to 4,999
51		1					John Leo Walter, Esq	128 N Commerce St	Attorneys	
52					1		Queen Anne's Elections BRD	132 N Commerce St	County Government Offices	Up to 999
53					1		State Attorney	136 N Commerce St	Legal Counsel & Prosecution	1,000 to 4,999
54		1					Lynn Knight	203 N Commerce St	Attorneys	Up to 999
55						1	VACANT	202-204 N Commerce St	N/A	Up to 999
56		1					Centreville Garage	205 N Commerce St	General Automotive Repair Shops	Up to 999
57					1		Kent Island Counseling Center	206 N Commerce St	County Government Offices	1,000 to 4,999
58					1		Queen Annes County Art Council	206 S Commerce St #1	County Government Offices	5,000 to 9,999
59					1		Queen Anne's Environmental	208 N Commerce St	County Government-Environmental Programs	1,000 to 4,999
60					1		Queen Anne's Plumbing Board	208 N Commerce St	County Government Offices	Up to 999
61		1					Artistic Hair Design	210 N Commerce St #1	Beauty Salons	Up to 999
62		1					Miles Insurance	210 N Commerce St	Insurance Agents, Brokers & Service	Up to 999
63		1					One Spirit Massage	220 N Commerce St	Massage Therapists	Up to 999
64		1					Thomas J Keating V Attorney	302 N Commerce St	Attorneys	Up to 999
65		1					Wey Solutions Inc	114 Happy Lady Ln	Computers-System Designers & Consultants	Up to 999
66					1		Centreville Town Hall	101 Lawyers Row	Municipal government	
67						1	VACANT	103 Lawyers Row #1	N/A	Up to 999
68		1					Freestate Agency	105 Lawyers Row	Insurance Agents, Brokers & Service	1,000 to 4,999
69	1						The West Gallery	107 Lawyers Row	Art Galleries & Dealers	Up to 999
70						1	VACANT	109 Lawyers Row	N/A	Up to 999
71		1					Downes & Gregory	115 Lawyers Row	Attorneys	Up to 999
72				1			Inter-rail Management Inc	111-113 Lawyers Row	Nonclassified Establishments	Up to 999
73						1	VACANT	117 Lawyers Row	N/A	1,000 to 4,999
74		1					Christopher F Drummond	119 Lawyers Row	Attorneys	Up to 999
75		1					George W Erickson	119 Lawyers Row	Real Estate Agents & Managers	Up to 999
76		1					S Sewell Craig	119 Lawyers Row	Attorneys	Up to 999
77						1	VACANT	100 N Liberty St	N/A	Up to 999
78					1		Alcohol And Drug Abuse Service	205 N Liberty St	County Government Offices	5,000 to 9,999

COUNT	Retail goods	Retail service	Restr	Not Retail	Gov't	Vacant	Name	Address	SIC Description	SF Descr
79					1		Queen Anne County Health Education	205 N Liberty St	County Government Public Health Programs	10,000 to 49,999
80		1					Bridges Behavioral Health	207 N Liberty St	Mental Health Services	Up to 999
81		1					Serenity Enhancement Center LLC	207 N Liberty St	Counseling services	Up to 999
82		1					Allergy & Asthma Care	227 N Liberty St	Physicians & Surgeons	1,000 to 4,999
83		1					Daniel D Rosendale Law Offices of	103 N Liberty St #100	Attorneys	Up to 999
84		1					Ashley Land Real Estate	105 N Liberty St #1	Real Estate Agents & Managers	
85	1						RJ Koenke, Art & Appraisers	105 N Liberty St #2	Art Galleries & Dealers	
86						1	VACANT	105 N Liberty St #3	N/A	
87		1					Joseph W McCartin Insurance Inc	105 N Liberty St #4	Insurance Agents, Brokers & Service	1,000 to 4,999
88					1		Queen Anne's Finance Office	107 N Liberty St	County Government Offices	1,000 to 4,999
89					1		Queen Anne's Personnel Office	107 N Liberty St	County Government Offices	1,000 to 4,999
90					1		Queen Anne's Register of Wills	107 N Liberty St #220	County Government Offices	1,000 to 4,999
91		1					Thomas H Downs DDS	100 Pennsylvania Ave	Dentists	1,000 to 4,999
92		1					Young San Karate	116 Pennsylvania Ave	Martial arts instruction	
93		1					H&R Block	116 Pennsylvania Ave	Tax preparation office	
94		1					Tidewater Physical Therapy	140 Pennsylvania Ave	Physical therapist	5,000 to 9,999
95	1						Peggys Sewing Center Ltd	210 Pennsylvania Ave	Sewing Machines-Household	Up to 999
96		1					Julio A Ramirez MD PC	218 Pennsylvania Ave	Physicians & Surgeons	Up to 999
97		1					Sublime Salon	322 Pennsylvania Ave	Beauty Salons	1,000 to 4,999
98		1					First Home Mortgage	324 Pennsylvania Ave	Real Estate Loans	Up to 999
99						1	VACANT	350 Pennsylvania Ave	N/A	1,000 to 4,999
100		1					McCrone Engineers	354 Pennsylvania Ave	Surveyors-Land	Up to 999
101				1			Bozek Inc	358 Pennsylvania Ave	Developer	Up to 999
102	1						Nancy Hammond Editions	102 Turpins Ln #1	Art Galleries & Dealers	1,000 to 4,999
103						1	VACANT	104 Turpins Ln	N/A	1,000 to 4,999
104						1	VACANT	109 E Water St	N/A	
105						1	VACANT	111 E Water St	N/A	
106						1	VACANT	113 E Water St	N/A (May become "Bayshore Steampot")	
107		1					Cutting Room	115 E Water St	Nonclassified Establishments	Up to 999
108		1					Callahan's Laundry	117 E Water St	Laundromat	
109	1						Cargo Direct Mattresses	117 E Water St	Mattress store	
110		1					Sam's Spot	119 E Water St	Beauty Salons	
111		1					Anew Growth Boutique	121 E Water St	Beauty Salons	1
112					1		US Post Office	202 E Water St #A	US Post Office	
113						1	VACANT	202 E Water St #B	Office suite	
114	1						Western Tire & Auto	204 E Water St	Automobile Parts & Supplies	4
115						1	VACANT	205 E Water St #B	N/A	4
116		1					Jo Baker Anne AIA	205 E Water St #A	Architectural Services	14
117		1					Torchio Architects Inc	205 E Water St #A	Architects	8

COUNT	Retail goods	Retail service	Restr	Not Retail	Gov't	Vacant	Name	Address	SIC Description	SF Descr
118		1					Everybody Yoga	205 E Water St	Yoga instruction	
119				1			Torchio Building Condominium Inc	205 E Water St	Nonclassified Establishments	0
120					1		Queen Anne's Soil Conservation District	211 E Water St	Nonclassified Establishments	0
121					1		USDA Service Office	215 E Water St	Federal gov't agency	
122			1				Good Guys Sports Bar	219 E Water St	Restaurants	23
123		1					Cottage Cuts Salon & Day Spa	102 W Water St	Beauty Salons	1,000 to 4,999
124		1					Nationwide Insurance	104 W Water St	Insurance Agents, Brokers & Service	Up to 999
125		1					Shelley Reinoehl	106 W Water St	Medical Billing Consultant	
126		1					An Optical Galleria LLC	111 W Water St	Optometrists	Up to 999
127		1					Trusted Ink Tattoo	112 W Water St #A	Tattoo parlor	1,000 to 4,999
128		1					Bay East Title Co LLC	114 W Water St	Title Abstract Offices	1,000 to 4,999
129		1					Cynthia M Mulligan Attorney	114 W Water St	Attorneys	Up to 999
130		1					Stevens Palmer LLC	114 W Water St	Attorneys	1,000 to 4,999
131						1	VACANT	117 W Water St	N/A	Up to 999
132		1					Law Offices of Susanne K Henley & Andrea Ross	118 W Water St	Attorneys	Up to 999
133						1	VACANT	120 W Water St	N/A	1,000 to 4,999
134						1	VACANT	125 W. Water St	N/A	
	13	71	4	7	22	17				
	9.7%	53.0%	3.0%	5.2%	16.4%	12.7%				

Business Mix by SIC Category

SIC Description	#	%	SIC Description	#	%
Government Offices	16	32.7%	Equipment rental	1	2.0%
Professional-legal	14	28.6%	Furniture-Designers & Custom Builders	1	2.0%
Professional-medical/dental	11	22.4%	General Automotive Repair Shops	1	2.0%
Beauty Salons	6	12.2%	Gift, Novelty & Souvenir Shops	1	2.0%
Real Estate Agents & Managers	5	10.2%	Glass repair	1	2.0%
Insurance Agents, Brokers & Service	4	8.2%	Household Appliance Stores	1	2.0%
Accountants	3	6.1%	Ice Cream Parlors	1	2.0%
Art Galleries & Dealers	3	6.1%	Laundromat	1	2.0%
Architects	2	4.1%	Lumber	1	2.0%
Banks	2	4.1%	Martial arts instruction	1	2.0%
Bonds-Bail	2	4.1%	Massage Therapists	1	2.0%
Computers	2	4.1%	Mattress store	1	2.0%
Counseling services	2	4.1%	Medical Billing Consultant	1	2.0%
Mental Health Services	2	4.1%	Museums	1	2.0%
Real Estate Loans	2	4.1%	Pharmacies	1	2.0%
Restaurants	2	4.1%	Pizza	1	2.0%
Surveyors-Land	2	4.1%	Real Estate Developers	1	2.0%
Title Abstract Offices	2	4.1%	Sewing Machines-Household	1	2.0%
Automobile Body Shops	1	2.0%	T-Shirt printer	1	2.0%
Automobile Parts & Supplies	1	2.0%	Tattoo parlor	1	2.0%
Childcare services	1	2.0%	Tax preparation office	1	2.0%
Construction contractor	1	2.0%	Tent rentals	1	2.0%
Custom boat designer	1	2.0%	Trust Companies	1	2.0%
Developer	1	2.0%	Yoga instruction	1	2.0%
E-cigarette store	1	2.0%			

Of 49 categories, 12 are retail

APPENDIX B

Survey Data Summary

Completed Surveys	Count	Margin of Error
All Responses	976	3.2%
Non-Shopper (0-1 visits per month)	542	4.3%
Shopper (2+ visits per month)	343	5.4%
Resident of 21617 zip	723	3.7%
Resident of other zip code	247	6.3%

Q1. Respondent ZIP code	All	Non-Shop	Shopper	Resident	Non-Resident
21617 – Centreville	75%	75%	76%	100%	N/A
21619 – Chester	1%	1%	1%	N/A	4%
21620 – Chestertown	3%	4%	1%	N/A	13%
21623 – Church Hill	3%	2%	4%	N/A	12%
21638 – Grasonville	2%	2%	1%	N/A	6%
21644 – Ingleside	0%	0%	0%	N/A	1%
21657 – Queen Anne	1%	1%	3%	N/A	6%
21658 – Queenstown	3%	4%	3%	N/A	13%
21660 - Ridgely	1%	1%	1%	N/A	4%
All others	11%	11%	9%	N/A	42%

Q2. Tenure at current ZIP code	All	Non-Shop	Shopper	Resident	Non-Resident
Less than 1 year	6%	7%	4%	7%	4%
1 year to 5 years	19%	23%	15%	20%	14%
5 years 10 years	23%	26%	19%	23%	21%
Longer than 10 years	52%	45%	62%	49%	61%

Q3. Previous ZIP code	All	Non-Shop	Shopper	Resident	Non-Resident
21012 – Arnold	3%	3%	0%	3%	
21122 – Pasadena	3%	3%	4%	4%	1%
21401 – Annapolis	3%	3%	3%	3%	1%
21601 – Easton	5%	4%	2%	5%	3%
21617 – Centreville	6%	5%	7%	3%	18%
21620 – Chestertown	3%	3%	2%	2%	4%
21658 – Queenstown	6%	6%	5%	6%	5%
21666 – Stevensville	6%	4%	7%	6%	5%

Q3. Work ZIP code	All	Non-Shop	Shopper	Resident	Non-Resident
21401 – Annapolis	8%	16%	3%	10%	3%
21601 – Easton	4%	9%	1%	4%	5%
21617 – Centreville	44%	65%	53%	36%	63%
21619 – Chester	2%	3%	1%	2%	2%
21620 – Chestertown	3%	3%	4%	2%	4%
21638 – Grasonville	2%	2%	3%	2%	2%
21658 – Queenstown	2%	3%	2%	2%	2%
21666 – Stevensville	6%	7%	6%	7%	4%

Q5. Importance of accomplishing… (% "Very" and "Not" important)		All	Non-Shop	Shopper	Resident	Non-Resident
Attract new retail businesses	Very important	75%	76%	76%	77%	72%
	Not very important	4%	3%	5%	4%	4%
Attract more eating places	Very important	68%	71%	62%	68%	66%
	Not very important	6%	4%	10%	7%	4%
Retain existing businesses	Very important	67%	63%	71%	66%	71%
	Not very important	2%	3%	2%	3%	2%
Attract more shoppers	Very important	59%	59%	61%	59%	59%
	Not very important	10%	10%	10%	10%	8%
Revitalize storefronts & buildings	Very important	59%	61%	57%	61%	52%
	Not very important	6%	6%	5%	5%	7%
Improve streetscapes	Very important	45%	46%	45%	46%	43%
	Not very important	14%	14%	14%	15%	11%
Provide more public parking	Very important	43%	43%	43%	41%	50%
	Not very important	14%	16%	12%	16%	8%
Provide downtown Wi-Fi hot spots	Very important	33%	33%	34%	32%	38%
	Not very important	30%	31%	28%	32%	26%
Create housing & retail space	Very important	29%	31%	26%	28%	31%
	Not very important	31%	29%	34%	33%	25%
Provice co-working space	Very important	20%	21%	19%	19%	26%
	Not very important	36%	38%	34%	38%	29%

Q6. Agree/disagree with "Make no changes. Downtown is fine as it is.	All	Non-Shop	Shopper	Resident	Non-Resident
Agree	7%	6%	8%	7%	7%
Disagree	93%	94%	92%	93%	93%

Q7. Primary reasons to visit Centreville	All	Non-Shop	Shopper	Resident	Non-Resident
Dine at the eating places	73%	70%	78%	76%	70%
Non-shopping visits (bank, medical, etc.)	45%	36%	59%	48%	36%
Shop at the stores	40%	25%	62%	43%	30%
Business with county	36%	33%	41%	34%	41%
I work here	19%	15%	22%	14%	35%
Family, friends	18%	12%	26%	17%	23%
I live here	15%	13%	18%	20%	N/A

Q8. Main reasons to not shop/dine in Centreville more often	All	Non-Shop	Shopper	Resident	Non-Resident
Limited offering of stores/shops	76%	78%	73%	79%	66%
Limited selection of dining places	60%	64%	57%	62%	56%
Selection of merchandise offered	44%	46%	42%	50%	35%
Doesn't have the stores I like	38%	39%	37%	41%	30%
Parking	33%	32%	35%	31%	39%
My time / schedule	25%	28%	21%	27%	17%
Store hours are inconvenient	13%	14%	12%	11%	18%
Traffic congestion	12%	11%	14%	12%	15%

Q9. Is parking available when visiting downtown Centreville	All	Non-Shop	Shopper	Resident	Non-Resident
Always	9%	9%	10%	10%	6%
Usually	40%	42%	39%	44%	29%
Sometimes	37%	38%	36%	33%	50%
Rarely	12%	9%	14%	11%	13%
Never	2%	3%	1%	2%	1%

Q10. Would patronize downtown more often if it offered more… (% Yes)	All	Non-Shop	Shopper	Resident	Non-Resident
Full-service restaurants	70%	73%	66%	72%	66%
Fresh produce market	63%	62%	64%	67%	51%
Bakery / baked goods	61%	61%	59%	64%	50%
Seafood, fish market	59%	58%	61%	63%	47%
Meats & poultry shop	56%	55%	53%	59%	45%
All-day breakfast restaurant (diner)	46%	45%	47%	48%	41%
Child-friendly restaurants	39%	42%	34%	42%	31%
Ice cream shop	39%	40%	36%	43%	26%
Hobby / craft stores	39%	38%	38%	41%	31%
Limited service restaurants	33%	32%	33%	34%	30%
Gift boutiques	31%	29%	33%	33%	22%
Artisan / handcrafted merchandise	28%	28%	28%	31%	20%
Home décor	28%	27%	29%	31%	20%
Sports recreation / training, etc.	28%	28%	27%	30%	21%
Antiques / vintage boutiques	26%	26%	28%	29%	18%
Free Wi-Fi hotspots	24%	22%	27%	24%	25%
Office supplies	24%	21%	30%	26%	18%
Consignment boutiques	23%	24%	23%	25%	18%
Doctor offices	22%	19%	27%	24%	17%
Dentists / dental care	22%	19%	25%	24%	15%
Eye care / eyeglasses	21%	18%	26%	22%	20%
Children's athletic consignment store	16%	15%	19%	18%	12%
Art classes	15%	16%	13%	16%	11%
Dance lessons	14%	18%	10%	16%	11%
Musical instruments / classes	13%	14%	12%	14%	9%
Karate / martial arts instruction	9%	10%	7%	10%	7%
Co-op art businesses	8%	8%	8%	9%	6%

Q16-19. Shopping Visits and Spending	All	Non-Shop	Shopper	Resident	Non-Resident
Shopping visits/month in Centreville	1.8	0.4	4.1	1.9	1.7
Shopping visits/month Elsewhere	6.0	6.1	5.8	6.0	5.9
Never shop in Centreville	37%	61%		36%	40%
Avg. $ per shopping visit to Centreville	$20.56	$8.99	$38.03	$21.30	$18.00
Avg. $ per shopping visit Elsewhere	$75.33	$75.32	$75.35	$77.01	$70.07
Capture rate of spending	7.6%	0.8%	26.3%	8.1%	6.9%
		Lost sales from Centreville HHs		$9,392,756	

Q11-15. Dining Visits and Spending	All	Non-Shop	Shopper	Resident	Non-Resident
Dining visits/month in Centreville	3.2	2.5	4.2	3.0	3.5
Dining visits/month Elsewhere	5.4	5.6	5.1	5.2	5.9
Never dine in Centreville	11%	15%	6%	10%	14%
Avg. $ pp per dining visit to Centreville	$17.98	$16.98	$19.63	.18.79	$15.39
Avg. $ pp per dining visit Elsewhere	$23.07	$22.21	$24.39	$23.73	$21.08
Capture rate of spending	31.3%	25.5%	39.8%	31.6%	30.3%
		Lost sales from Centreville HHs		$2,520,120	

Q23. Please rate the following for downtown Centreville (% "Good" and "Poor")		All	Non-Shop	Shopper	Resident	Non-Resident
Cleanlines of streets, sidewalks, parking	Good	49%	47%	53%	51%	44%
	Poor	9%	9%	8%	8%	9%
Clear directional signage	Good	42%	41%	42%	44%	35%
	Poor	11%	12%	11%	11%	13%
Overall appearance	Good	29%	27%	32%	29%	30%
	Poor	14%	16%	10%	15%	10%
Smoothness of traffic flow	Good	22%	24%	19%	23%	19%
	Poor	25%	25%	26%	25%	28%
Convenient parking	Good	17%	17%	17%	18%	12%
	Poor	30%	30%	30%	28%	38%
Comfortable places to sit	Good	10%	8%	12%	10%	7%
	Poor	39%	41%	36%	40%	36%
Selection of eating places	Good	6%	5%	8%	6%	4%
	Poor	50%	55%	41%	51%	47%
Merchandise/products/services offered	Good	4%	3%	5%	3%	4%
	Poor	55%	61%	47%	59%	43%
Variety of businesses	Good	3%	1%	5%	3%	2%
	Poor	65%	70%	56%	68%	56%

Q24. Awareness of, and attendance at, events		All	Non-Shop	Shopper	Resident	Non-Resident
Two Rivers Bike Ride	Aware of event	86%	87%	85%	87%	79%
	Have attended event	18%	16%	20%	16%	29%
Heck with the Malls event	Aware of event	84%	83%	86%	85%	83%
	Have attended event	39%	39%	39%	39%	36%
Centreville Day event	Aware of event	84%	83%	85%	84%	82%
	Have attended event	40%	41%	38%	40%	36%
Centreville Farmer's Market	Aware of event	82%	82%	82%	80%	88%
	Have attended event	65%	65%	66%	69%	54%
Fourth of July fireworks	Aware of event	82%	82%	81%	81%	85%
	Have attended event	49%	49%	50%	54%	33%
Christmas Parade	Aware of event	80%	80%	78%	77%	87%
	Have attended event	65%	64%	67%	69%	54%
Events (Other)	Aware of event	82%	82%	82%	80%	87%
	Have attended event	45%	44%	46%	45%	43%

Q25. Would attend these events (% "Yes" and "Possible")		All	Non-Shop	Shopper	Resident	Non-Resident
Live outdoor concerts	Yes, would attend	59%	56%	63%	62%	47%
	Possible	36%	37%	34%	33%	45%
Events at the Wharf	Yes, would attend	52%	52%	52%	55%	43%
	Possible	41%	41%	40%	38%	48%
First Saturday	Yes, would attend	49%	50%	47%	52%	38%
	Possible	41%	40%	43%	40%	44%
First Friday	Yes, would attend	46%	44%	48%	49%	36%
	Possible	44%	44%	43%	42%	48%
Outdoor movies	Yes, would attend	42%	43%	41%	46%	29%
	Possible	39%	38%	43%	38%	44%
Arts Festival	Yes, would attend	39%	39%	38%	43%	24%
	Possible	41%	40%	44%	39%	49%
Children's events	Yes, would attend	34%	36%	31%	37%	25%
	Possible	30%	25%	39%	29%	34%
Storytelling festival	Yes, would attend	17%	17%	17%	18%	12%
	Possible	35%	32%	38%	35%	35%
Lecture series	Yes, would attend	14%	13%	17%	15%	12%
	Possible	42%	42%	42%	44%	37%

Q26. Value of media sources (% "Very" & "Not")		All	Non-Shop	Shopper	Resident	Non-Resident
Facebook	Very valuable	51%	53%	49%	52%	49%
	Not valuable	21%	20%	23%	21%	20%
Roadsign signs	Very valuable	44%	44%	45%	47%	38%
	Not valuable	11%	12%	10%	10%	15%
Google/internet searches	Very valuable	39%	40%	37%	40%	38%
	Not valuable	24%	25%	22%	25%	20%
Storefront posters / signs	Very valuable	37%	34%	42%	37%	37%
	Not valuable	14%	16%	10%	12%	18%
Shore Update	Very valuable	37%	36%	39%	38%	34%
	Not valuable	24%	27%	19%	22%	29%
What's Up Eastern Shore	Very valuable	28%	28%	27%	29%	25%
	Not valuable	30%	34%	24%	31%	29%
Town Email Blasts	Very valuable	24%	24%	23%	28%	11%
	Not valuable	46%	47%	46%	41%	64%
TownOfCentreville.org	Very valuable	23%	21%	26%	25%	16%
	Not valuable	34%	37%	30%	31%	43%
Record-Observer	Very valuable	23%	17%	31%	23%	21%
	Not valuable	40%	46%	30%	40%	39%
Star Democrat	Very valuable	20%	15%	27%	19%	23%
	Not valuable	40%	46%	30%	41%	34%
WCEI 96.7 FM radio	Very valuable	19%	15%	23%	19%	19%
	Not valuable	52%	55%	47%	54%	45%
Bay Times	Very valuable	16%	14%	20%	14%	23%
	Not valuable	46%	51%	38%	48%	41%
Instagram	Very valuable	13%	14%	11%	15%	6%
	Not valuable	68%	70%	65%	66%	73%
Twitter	Very valuable	11%	12%	9%	12%	6%
	Not valuable	69%	69%	68%	67%	73%
Kent Island Online	Very valuable	9%	9%	10%	9%	10%
	Not valuable	62%	83%	61%	62%	62%
Attraction Magazine	Very valuable	5%	3%	7%	5%	6%
	Not valuable	68%	73%	59%	68%	65%
Chestertown Spy	Very valuable	4%	4%	4%	3%	8%
	Not valuable	74%	75%	72%	76%	66%
Queen Anne's Spy	Very valuable	3%	3%	4%	3%	5%
	Not valuable	74%	77%	69%	75%	70%
Talbot Spy	Very valuable	1%	1%	1%	1%	1%
	Not valuable	81%	84%	77%	82%	80%

Q34. Gender of respondent	All	Non-Shop	Shopper	Resident	Non-Resident
Female	64%	65%	63%	62%	69%
Male	36%	35%	37%	38%	32%

Q35. Home population of respondent	All	Non-Shop	Shopper	Resident	Non-Resident
# of Adults	2.29	2.30	2.30	2.30	2.27
# of Children	1.43	1.46	1.37	1.51	1.17

Q36. Age of respondent	All	Non-Shop	Shopper	Resident	Non-Resident
Under 18	1%	1%	1%	1%	
18 to 24	3%	3%	2%	3%	3%
25 to 34	15%	19%	10%	15%	16%
35 to 44	23%	26%	19%	23%	23%
45 to 54	27%	27%	27%	26%	30%
55 to 64	18%	14%	24%	17%	21%
65 or older	13%	10%	17%	15%	7%
AVERAGE AGE	47.9	46.5	51.1	48.1	47.1

Q37. Income of respondent	All	Non-Shop	Shopper	Resident	Non-Resident
Less than $25,000 per year	2%	1%	3%	2%	2%
$25,000 to $34,999 per year	3%	3%	3%	3%	3%
$35,000 to $49,999 per year	7%	6%	9%	7%	7%
$50,000 to $74,999 per year	17%	16%	18%	17%	18%
$75,000 to $99,999 per year	18%	17%	20%	16%	24%
$100,000 to $149,999 per year	31%	34%	29%	32%	29%
$150,000 to $199,999 per year	12%	12%	11%	14%	6%
$200,000 to $249,999 per year	5%	5%	4%	5%	5%
$250,000 or more per year	5%	6%	3%	5%	5%
HH INCOME	$118,419	$124,468	$108,676	$119,730	$114,375

Q38. How respondent heard of survey	All	Non-Shop	Shopper	Resident	Non-Resident
Window/street sign	36%	33%	39%	39%	25%
Email from Employer	12%	11%	13%	4%	35%
Friend/family	12%	12%	11%	12%	12%
Email from town	10%	9%	12%	11%	7%
Email community group or organization	8%	9%	8%	8%	8%
Hand-out/flyer from school	5%	6%	3%	6%	2%
Local news	3%	3%	3%	3%	5%
Other	30%	31%	29%	33%	23%

APPENDIX C

Economic Data

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Population (2014)	4,753	7,331	9,660	23,095	11,131	276,598
% of Region	1.7%	2.7%	3.5%	8.3%	4.0%	
Households (2014)	1,735	2,610	3,461	8,425	3,963	105,862
% of Region	1.6%	2.5%	3.3%	8.0%	3.7%	
Area (Sq Mi)	2.5	28.3	78.5	314.0	113.6	1,962.5
% of Region	0.1%	1.4%	4.0%	16.0%	5.8%	
Population / Sq Mi	1,940	259	123	74	98	141
Households / Sq Mi	708	92	44	27	35	54
Pop. Growth (2014-2019)	1.41%	1.73%	1.60%	1.30%	1.63%	0.55%

Population by Race						
White	88%	88%	87%	84%	88%	84%
Black	9%	8%	8%	10%	8%	10%
American Indian	0%	0%	0%	0%	0%	0%
Asian	1%	1%	1%	1%	1%	2%
Pacific Islander	0%	0%	0%	0%	0%	0%
Some other race	1%	1%	1%	2%	1%	3%
Two or more races	2%	2%	2%	2%	2%	2%
Total Hispanic Population	3%	3%	3%	4%	3%	7%

Population by Sex						
Male	49%	49%	49%	50%	49%	49%
Female	51%	51%	51%	50%	51%	51%

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Population by Age						
Ages 0 - 4	6.5%	6.3%	5.9%	5.7%	5.9%	5.3%
Ages 5 - 9	8.1%	8.0%	7.4%	6.9%	7.3%	6.0%
Ages 10 - 14	7.8%	7.9%	7.7%	7.4%	7.7%	6.2%
Ages 15 - 24	10.6%	10.8%	11.0%	10.5%	11.1%	12.8%
Ages 25 - 34	9.8%	9.8%	9.9%	10.4%	9.9%	11.1%
Ages 35 - 44	13.9%	13.8%	13.2%	12.1%	13.1%	11.4%
Ages 45 - 54	14.3%	14.4%	14.8%	15.6%	15.2%	15.1%
Ages 55 - 64	12.0%	12.2%	12.9%	14.1%	13.2%	14.5%
Ages 65 - 74	10.2%	10.1%	10.6%	10.7%	10.1%	10.6%
Ages 75 - 84	4.7%	4.6%	4.8%	4.9%	4.5%	5.0%
Ages 85+	2.2%	2.0%	1.9%	1.8%	1.8%	2.1%
Age 9 or under	14.6%	14.3%	13.3%	12.6%	13.2%	11.3%
Ages 24 or younger	33.0%	33.0%	32.0%	30.5%	32.0%	30.3%
Age 25 or older	67.1%	66.9%	68.1%	69.6%	67.8%	69.8%
Age 55 or older	29.1%	28.9%	30.2%	31.5%	29.6%	32.2%
Age 65 or older	17.1%	16.7%	17.3%	17.4%	16.4%	17.7%
Median Age (Total population)	40.7	40.7	41.5	42.8	41.4	42.8
Households by Type						
All HHs with children	38%	40%	38%	35%	39%	31%
Multigenerational Households	4%	4%	4%	4%	4%	4%
Average HH size	2.65	2.73	2.73	2.69	2.75	2.53
Household Occupancy and Mortgage Status						
Owner occupied HHs	74.6%	81.6%	81.5%	81.2%	81.8%	76.7%
Owned Free & Clear	15.1%	16.3%	17.5%	19.6%	17.4%	19.4%
Renter occupied HHs	25.4%	18.4%	18.5%	18.8%	18.2%	23.3%

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Households by Income						
< $15,000	7.7%	7.6%	7.1%	7.4%	6.9%	7.4%
$15,000 - $24,999	3.6%	3.8%	4.4%	5.4%	4.5%	6.8%
$25,000 - $34,999	5.2%	5.1%	5.1%	5.5%	4.8%	7.4%
$35,000 - $49,999	9.5%	10.3%	10.3%	9.2%	10.1%	10.0%
$50,000 - $74,999	13.1%	10.7%	12.8%	14.4%	12.8%	16.0%
$75,000 - $99,999	16.1%	17.5%	17.4%	18.1%	18.0%	13.9%
$100,000 - $149,999	22.5%	25.1%	24.0%	22.1%	24.2%	19.9%
$150,000 - $$199,999	12.6%	11.0%	10.2%	9.7%	10.3%	9.1%
$200,000 +	9.7%	8.9%	8.7%	8.2%	8.5%	9.7%
Median HH Income	$90,312	$91,252	$87,803	$84,279	$88,273	$78,509
Average HH Income	$108,506	$107,434	$105,306	$102,453	$105,236	$100,696
Less than $25,000	11.3%	11.4%	11.5%	12.8%	11.4%	14.2%
Less than $50,000	26.0%	26.8%	26.9%	27.5%	26.3%	31.6%
More than $75,000	60.9%	62.5%	60.3%	58.1%	61.0%	52.6%
More than $100,000	44.8%	45.0%	42.9%	40.0%	43.0%	38.7%
Access to and internet use in past 30 days						
Any internet use	88.3%	88.6%	87.8%	85.9%	87.4%	84.5%
Accessed from home	85.0%	58.3%	84.4%	81.8%	83.7%	80.3%
Accessed from work	47.7%	48.0%	46.7%	43.2%	46.1%	42.2%
Accessed from school/library	10.9%	11.0%	10.9%	10.4%	10.9%	10.4%
Accessed from other	26.1%	26.5%	26.1%	24.8%	25.9%	25.6%
Access internet via computer	85.2%	85.5%	84.7%	82.6%	84.3%	81.2%
Access internet via cell phone	52.1%	52.5%	50.9%	47.6%	50.2%	48.3%
Made personal purchase via internet	47.3%	47.7%	46.9%	45.1%	46.3%	46.2%
Made business purchase via internet	13.4%	13.5%	12.9%	12.0%	12.7%	12.3%

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Online 10+ hours a day	2.8%	2.8%	2.7%	2.5%	2.7%	2.9%
Online 5.0 to 9.9 hours a day	9.7%	9.9%	9.6%	8.1%	9.3%	8.7%
Online 2.0 to 4.9 hours a day	21.1%	21.3%	20.9%	19.9%	20.5%	19.8%
Online 1.0 to 1.9 hours a day	18.4%	18.7%	18.7%	18.1%	18.5%	18.4%
Online 0.5 to 0.9 hours a day	15.1%	15.0%	14.9%	15.2%	15.0%	14.4%
Online < 0.5 hours a day	12.6%	12.4%	12.3%	12.8%	12.5%	11.6%
Pets and products						
Households owns any pet	61.7%	61.6%	61.5%	61.6%	62.1%	58.3%
Households owns any cat	25.5%	25.3%	25.7%	25.3%	26.5%	26.2%
Households owns any dog	46.7%	46.7%	46.5%	46.7%	47.2%	43.5%
Cats per sq mi	437	57	27	17	22	31
Dogs per sq mile	181	23	11	7	9	14
Business & Employment Data						
Total businesses	425	390	503	1,170	517	24,225
% of Region	1.8%	1.6%	2.1%	4.8%	2.1%	
Total employees	2,628	3,603	4,500	9,791	4,510	113,386
% of Region	2.3%	3.2%	4.0%	8.6%	4.0%	
Employees per Sq Mi	1,073	127	57	31	40	58
Employee/Residential Population Ratio	0.55	0.49	0.47	0.42	0.41	0.41

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Retail Trade: Businesses	36	62	89	241	78	2,485
% of Region	1.4%	2.5%	3.6%	9.7%	3.1%	
Businesses as a % of Total	8%	16%	18%	21%	15%	10%
Businesses per Sq Mi	14.7	2.2	1.1	0.8	0.7	1.3
Employees	188	521	793	2,185	614	17,459
% of Region	1.1%	3.0%	4.5%	12.5%	3.5%	
Employees per Sq Mi	76.7	18.4	10.1	7.0	5.4	8.9
Employees as a % of Total	7%	14%	18%	22%	14%	15%
Finance, Ins., Real Estate Businesses	36	49	57	104	59	1,503
% of Region	2.4%	3.3%	3.8%	6.9%	3.9%	
Businesses as a % of Total	8%	13%	11%	9%	11%	6%
Employees	146	257	299	502	309	5,697
% of Region	2.6%	4.5%	5.2%	8.8%	5.4%	
Employees as a % of Total	6%	7%	7%	5%	7%	5%
Service Businesses	217	128	158	347	164	10,641
% of Region	2.0%	1.2%	1.5%	3.3%	1.5%	
Businesses as a % of Total	51%	33%	31%	30%	32%	44%
Employees	1,067	1,230	1,431	3,300	1,481	44,334
% of Region	2.4%	2.8%	3.2%	7.4%	3.3%	
Employees as a % of Total	41%	34%	32%	34%	33%	39%
Government: Businesses	32	51	58	79	62	454
% of Region	7.0%	11.2%	12.8%	17.4%	13.7%	
Businesses as a % of Total	8%	13%	12%	7%	12%	2%
Employees	744	955	1,103	1,480	1,222	18,703
% of Region	4.0%	5.1%	5.9%	7.9%	6.5%	
Employees as a % of Total	28%	27%	25%	15%	27%	16%
Estimated "Office Workers"	1,524	2,090	2,610	5,679	2,616	65,764
% of Region	2.3%	3.2%	4.0%	8.6%	4.0%	
Estimated Office Worker Spending	$8,810,107	$12,078,697	$15,085,800	$32,823,348	$15,119,324	$380,115,226

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Supply & Demand – Total Retail Trade & Food						
Total Retail Trade & Food – Demand	$76,866,782	$112,879,912	$147,565,062	$350,262,917	$169,125,705	$4,345,094,419
Total Retail Trade & Food – Supply	$30,704,765	$75,781,910	$139,861,820	$329,070,479	$98,033,673	$2,929,006,899
Total Retail Trade & Food – Retail Leakage	$46,162,017	$37,098,002	$7,703,242	$21,192,438	$71,092,032	$1,416,087,520
Total Retail Trade & Food – Businesses	33	53	86	204	74	2,146
Consumer Demand per HH	$44,304	$43,249	$42,637	$41,574	$42,676	$41,045
Retail Sales per HH	$17,697	$29,035	$40,411	$39,059	$24,737	$27,668
Retail Leakage per HH	$26,606	$14,214	$2,226	$2,515	$17,939	$13,377
HHs per Retail Business	53	49	40	41	54	49
Retailers per Sq Mile	13	2	1	1	1	1
Avg Sales per Retailer/Year	$930,447	$1,429,847	$1,626,300	$1,613,091	$1,324,779	$1,364,868
Consumer Demand per Sq Mile	$31,374,197	$3,994,335	$1,879,810	$1,115,487	$1,489,307	$2,214,061
Retail Sales per Sq Mile	$12,532,557	$2,681,596	$1,781,679	$1,047,995	$863,276	$1,492,488
Retail Leakage per Sq Mile	$18,841,640	$1,312,739	$98,130	$67,492	$626,031	$721,573
Supply & Demand - Retail Trade ONLY						
Total Retail Trade – Demand	$69,006,889	$101,293,590	$132,449,408	$314,755,497	$151,847,780	$3,901,777,447
Total Retail Trade – Supply	$23,506,184	$63,061,179	$126,013,164	$306,552,251	$84,435,312	$2,604,837,402
Total Retail Trade – Retail Leakage	$45,500,705	$38,232,411	$6,436,244	$8,203,246	$67,412,468	$1,296,940,045
Total Retail Trade – No of Businesses	26	45	76	185	63	1,796
Consumer Demand per HH	$39,773	$38,810	$38,269	$37,360	$38,316	$36,857
Retail Sales per HH	$13,548	$24,161	$36,409	$36,386	$21,306	$24,606
Retail Leakage per HH	$26,225	$14,648	$1,860	$974	$17,010	$12,251
HHs per Retail Business	67	58	46	46	63	59
Business per Sq Mile	11	2	1	1	1	1
Avg Sales per Retailer/Year	$904,084	$1,401,360	$1,658,068	$1,657,039	$1,340,243	$1,450,355
Consumer Demand per Sq Mile	$28,166,077	$3,584,345	$1,687,254	$1,002,406	$1,337,159	$1,988,167
Retail Sales per Sq Mile	$9,594,361	$2,231,464	$1,605,263	$976,281	$743,530	$1,327,306
Retail Leakage per Sq Mile	$18,571,716	$1,352,881	$81,990	$26,125	$593,629	$660,861

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Supply & Demand Food & Drink ONLY						
Total Food & Drink – Demand	$7,859,893	$11,586,321	$15,115,654	$35,507,421	$17,277,925	$443,316,971
Total Food & Drink – Supply	$7,198,581	$12,720,732	$13,848,657	$22,518,228	$13,598,361	$324,169,496
Total Food & Drink – Retail Leakage	$661,312	($1,134,411)	$1,266,997	$12,989,193	$3,679,564	$119,147,475
Total Food & Drink – No of Businesses	7	8	10	19	11	350
Consumer Demand per HH	$4,530	$4,439	$4,367	$4,215	$4,360	$4,188
Retail Sales per HH	$4,149	$4,874	$4,001	$2,673	$3,431	$3,062
Retail Leakage per HH	$381	($435)	$366	$1,542	$928	$1,125
HHs per Retail Business	248	326	346	443	360	302
Business per Sq Mile	3	0	0	0	0	0
Avg Sales per Retailer/Year	$1,028,369	$1,590,092	$1,384,866	$1,185,170	$1,236,215	$926,199
Consumer Demand per Sq Mile	$3,208,120	$409,990	$192,556	$113,081	$152,148	$225,894
Retail Sales per Sq Mile	$2,938,196	$450,132	$176,416	$71,714	$119,746	$165,182
Retail Leakage per Sq Mile	$269,923	($40,142)	$16,140	$41,367	$32,402	$60,712
Supply & Demand by Retail Category						
Automobile Dealers - Consumer Demand	$12,920,345	$18,903,954	$24,650,624	$58,628,468	$28,308,633	$715,096,848
Automobile Dealers - Retail Supply	$2,472,848	$2,790,336	$3,361,973	$5,181,491	$2,867,354	$567,252,266
Automobile Dealers - Leakage / Surplus	$10,447,497	$16,113,618	$21,288,651	$53,446,977	$25,441,279	$147,844,582
Automobile Dealers - No of Businesses	2	2	2	5	2	33
Retail Leakage per HH	$6,022	$6,174	$6,151	$6,344	$6,420	$1,397
Retail Leakage per Sq Mi	$4,264,284	$570,192	$271,193	$170,213	$224,034	$75,335
HHs per Retail Business	868	1,305	1,731	1,685	1,982	3,208
Retailers per Sq Mile	0.8	0.1	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$1,236,424	$1,395,168	$1,680,987	$1,036,298	$1,433,677	$17,189,463

Centreville, MD	**Town of Centreville**	**3.0-mile Radius**	**5.0-mile Radius**	**10.0-mile Radius**	**Trade Area (21617 Zip)**	**Region 25.0 mile radius**
Other MV Dealers - Consumer Demand	$924,932	$1,364,819	$1,787,135	$4,318,810	$2,048,378	$54,318,075
Other MV Dealers - Retail Supply	$0	$152,100	$182,647	$18,591,245	$0	$135,548,424
Other MV Dealers - Leakage / Surplus	$924,932	$1,212,719	$1,604,488	($14,272,435)	$2,048,378	($81,230,349)
Other MV Dealers - No of Businesses	0	1	1	7	0	98
Retail Leakage per HH	$533	$465	$464	($1,694)	$517	($767)
Retail Leakage per Sq Mi	$377,523	$42,913	$20,439	($45,454)	$18,038	($41,391)
HHs per Retail Business	0	2,610	3,461	1,204	0	1,080
Retailers per Sq Mile	0.0	0.0	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	0	152,100	182,647	2,655,892	0	1,383,147
Auto Parts & Accessories - Consumer Demand	$963,085	$1,416,634	$1,853,573	$4,372,465	$2,120,384	$53,492,239
Auto Parts & Accessories - Retail Supply	$0	$46,669	$111,764	$672,494	$78,203	$22,375,413
Auto Parts & Accessories - Leakage / Surplus	$963,085	$1,369,965	$1,741,809	$3,699,971	$2,042,181	$31,116,826
Auto Parts & Accessories - No of Businesses	0	1	1	3	1	48
Retail Leakage per HH	$555	$525	$503	$439	$515	$294
Retail Leakage per Sq Mi	$393,096	$48,477	$22,189	$11,783	$17,983	$15,856
HHs per Retail Business	0	2,610	3,461	2,808	3,963	2,205
Retailers per Sq Mile	0.00	0.04	0.01	0.01	0.01	0.02
Avg Sales per Retailer/Year	$0	$46,669	$111,764	$224,165	$78,203	$466,154
Furniture Stores - Consumer Demand	$878,105	$1,288,855	$1,675,623	$3,934,523	$1,917,330	$48,851,289
Furniture Stores - Retail Supply	$1,049,271	$1,953,729	$2,056,364	$3,312,433	$2,056,370	$45,684,314
Furniture Stores - Leakage / Surplus	($171,166)	($664,874)	($380,741)	$622,090	($139,040)	$3,166,975
Furniture Stores - No of Businesses	1	3	3	4	3	46
Retail Leakage per HH	($99)	($255)	($110)	$74	($35)	$30
Retail Leakage per Sq Mi	($69,864)	($23,527)	($4,850)	$1,981	($1,224)	$1,614
HHs per Retail Business	1,735	870	1,154	2,106	1,321	2,301
Retailers per Sq Mile	0.4	0.1	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$1,049,271	$651,243	$685,455	$828,108	$685,457	$993,137

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Home Furnishings - Consumer Demand	$724,233	$1,068,709	$1,402,590	$3,306,041	$1,603,706	$41,235,957
Home Furnishings - Retail Supply	$0	$2,652,350	$4,048,873	$7,464,395	$2,755,258	$22,039,311
Home Furnishings - Leakage / Surplus	$724,233	($1,583,641)	($2,646,283)	($4,158,354)	($1,151,552)	$19,196,646
Home Furnishings - No of Businesses	0	3	4	7	2	70
Retail Leakage per HH	$417	($607)	($765)	($494)	($291)	$181
Retail Leakage per Sq Mi	$295,605	($56,038)	($33,711)	($13,243)	($10,140)	$9,782
HHs per Retail Business	0.00	870.00	865.25	1,203.57	1,981.50	1,512.31
Retailers per Sq Mile	0.0	0.1	0.1	0.0	0.0	0.0
Avg Sales per Retailer/Year	$0	$884,117	$1,012,218	$1,066,342	$1,377,629	$314,847
Electronic/Appliance - Consumer Demand	$2,011,657	$2,964,281	$3,868,052	$9,079,123	$4,419,944	$114,095,012
Electronic/Appliance - Retail Supply	$210,716	$321,041	$355,136	$1,329,270	$392,532	$18,287,007
Electronic/Appliance - Leakage / Surplus	$1,800,941	$2,643,240	$3,512,916	$7,749,853	$4,027,412	$95,808,005
Electronic/Appliance - No of Businesses	2	3	3	7	3	71
Retail Leakage per HH	$1,038	$1,013	$1,015	$920	$1,016	$905
Retail Leakage per Sq Mi	$735,078	$93,533	$44,751	$24,681	$35,465	$48,819
HHs per Retail Business	868	870	1,154	1,204	1,321	1,491
Retailers per Sq Mile	0.8	0.1	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$105,358	$107,014	$118,379	$189,896	$130,844	$257,563
Bldg Materials - Consumer Demand	$2,050,878	$3,027,479	$3,963,555	$9,446,841	$4,524,305	$122,005,047
Bldg Materials - Retail Supply	$5,664,889	$7,743,621	$10,497,685	$12,029,903	$9,671,900	$66,997,415
Bldg Materials - Leakage / Surplus	($3,614,011)	($4,716,142)	($6,534,130)	($2,583,062)	($5,147,595)	$55,007,632
Bldg Materials - No of Businesses	2	4	5	9	4	112
Retail Leakage per HH	($2,083)	($1,807)	($1,888)	($307)	($1,299)	$520
Retail Leakage per Sq Mi	($1,475,107)	($166,884)	($83,237)	($8,226)	($45,329)	$28,029
HHs per Retail Business	868	653	692	936	991	945
Retailers per Sq Mile	0.8	0.1	0.1	0.0	0.0	0.1
Avg Sales per Retailer/Year	$2,832,445	$1,935,905	$2,099,537	$1,336,656	$2,417,975	$598,191

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Lawn & Garden - Consumer Demand	$366,662	$534,576	$709,146	$1,754,488	$821,574	$23,000,725
Lawn & Garden - Retail Supply	$0	$766,755	$1,762,368	$4,519,349	$2,105,580	$46,005,104
Lawn & Garden - Leakage / Surplus	$366,662	($232,179)	($1,053,222)	($2,764,861)	($1,284,006)	($23,004,379)
Lawn & Garden - No of Businesses	0	1	3	5	2	39
Retail Leakage per HH	$211	($89)	($304)	($328)	($324)	($217)
Retail Leakage per Sq Mi	$149,658	($8,216)	($13,417)	($8,805)	($11,307)	($11,722)
HHs per Retail Business	0.0	2610.0	1153.7	1685.0	1981.5	2714.4
Retailers per Sq Mile	0.0	0.0	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$0	$766,755	$587,456	$903,870	$1,052,790	$1,179,618
Grocery Store - Consumer Demand	$11,417,874	$16,762,593	$21,933,999	$52,208,051	$25,157,113	$644,336,013
Grocery Store - Retail Supply	$0	$17,201,019	$19,772,353	$27,543,451	$21,678,988	$485,177,987
Grocery Store - Leakage / Surplus	$11,417,874	($438,426)	$2,161,646	$24,664,600	$3,478,125	$159,158,026
Grocery Store - No of Businesses	0	2	3	7	2	125
Retail Leakage per HH	$6,581	($168)	$625	$2,928	$878	$1,503
Retail Leakage per Sq Mi	$4,660,357	($15,514)	$27,537	$78,550	$30,628	$81,100
HHs per Retail Business	0.0	14.1	26.2	44.9	56.8	15.7
Retailers per Sq Mile	0.0	0.1	0.0	0.0	0.0	0.1
Avg Sales per Retailer/Year	$0	$8,600,510	$6,590,784	$3,934,779	$10,839,494	$3,881,424
Specialty Food - Consumer Demand	$319,735	$469,856	$614,775	$1,460,389	$704,768	$18,211,048
Specialty Food - Retail Supply	$0	$44,324	$53,226	$493,276	$90,273	$20,457,623
Specialty Food - Leakage / Surplus	$319,735	$425,532	$561,549	$967,113	$614,495	($2,246,575)
Specialty Food - No of Businesses	0	1	1	3	1	82
Retail Leakage per HH	$184	$163	$162	$115	$155	($21)
Retail Leakage per Sq Mi	$130,504	$15,058	$7,153	$3,080	$5,411	($1,145)
HHs per Retail Business	0.0	2610.0	3461.0	2808.3	3963.0	1291.0
Retailers per Sq Mile	0.0	0.0	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$0	$44,324	$53,226	$164,425	$90,273	$249,483

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Liquor Stores - Consumer Demand	$1,395,763	$2,057,839	$2,691,420	$6,343,223	$3,074,362	$79,557,785
Liquor Stores - Retail Supply	$521,817	$1,707,980	$3,047,721	$5,606,678	$3,313,156	$70,403,072
Liquor Stores - Leakage / Surplus	$873,946	$349,859	($356,301)	$736,545	($238,794)	$9,154,713
Liquor Stores - No of Businesses	1	1	1	3	1	46
Retail Leakage per HH	$504	$134	($103)	$87	($60)	$86
Retail Leakage per Sq Mi	$356,713	$12,380	($4,539)	$2,346	($2,103)	$4,665
HHs per Retail Business	1,735	2,610	3,461	2,808	3,963	2,301
Retailers per Sq Mile	0.4	0.0	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$521,817	$1,707,980	$3,047,721	$1,868,893	$3,313,156	$1,530,502
Health & Personal Care - Consumer Demand	$5,236,244	$7,643,553	$10,022,449	$24,101,375	$11,518,743	$302,087,910
Health & Personal Care - Retail Supply	$3,747,498	$11,040,610	$19,138,095	$21,930,285	$18,434,299	$157,607,927
Health & Personal Care - Leakage / Surplus	$1,488,746	($3,397,057)	($9,115,646)	$2,171,090	($6,915,556)	$144,479,983
Health & Personal Care - No of Businesses	4	4	7	12	7	113
Retail Leakage per HH	$858	($1,302)	($2,634)	$258	($1,745)	$1,365
Retail Leakage per Sq Mi	$607,651	($120,207)	($116,123)	$6,914	($60,898)	$73,620
HHs per Retail Business	434	653	494	702	566	937
Retailers per Sq Mile	1.6	0.1	0.1	0.0	0.1	0.1
Avg Sales per Retailer/Year	$936,875	$2,760,153	$2,734,014	$1,827,524	$2,633,471	$1,394,760
Gasoline Stations - Consumer Demand	$6,173,621	$9,037,350	$11,803,878	$28,125,317	$13,556,283	$346,958,842
Gasoline Stations - Retail Supply	$5,890,931	$6,379,261	$8,119,148	$12,818,775	$7,830,848	$187,150,965
Gasoline Stations - Leakage / Surplus	$282,690	$2,658,089	$3,684,730	$15,306,542	$5,725,435	$159,807,877
Gasoline Stations - No of Businesses	2	2	3	6	3	49
Retail Leakage per HH	$163	$1,018	$1,065	$1,817	$1,445	$1,510
Retail Leakage per Sq Mi	$115,384	$94,058	$46,939	$48,747	$50,418	$81,431
HHs per Retail Business	868	1,305	1,154	1,404	1,321	2,160
Retailers per Sq Mile	0.8	0.1	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$2,945,466	$3,189,631	$2,706,383	$2,136,463	$2,610,283	$3,819,407

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Clothing Stores - Consumer Demand	$3,320,896	$4,903,162	$6,411,427	$15,000,325	$7,319,567	$187,200,008
Clothing Stores - Retail Supply	$263,768	$3,433,760	$33,626,557	$125,598,984	$4,786,656	$177,692,647
Clothing Stores - Leakage / Surplus	$3,057,128	$1,469,402	($27,215,130)	($110,598,659)	$2,532,911	$9,507,361
Clothing Stores - No of Businesses	1	3	11	36	4	149
Retail Leakage per HH	$1,762	$563	($7,863)	($13,127)	$639	$90
Retail Leakage per Sq Mi	$1,247,807	$51,996	($346,690)	($352,225)	$22,305	$4,845
HHs per Retail Business	1,735	870	315	234	991	710
Retailers per Sq Mile	0.4	0.1	0.1	0.1	0.0	0.1
Avg Sales per Retailer/Year	$263,768	$1,144,587	$3,056,960	$3,488,861	$1,196,664	$1,192,568
Shoe Stores - Consumer Demand	$642,485	$948,894	$1,241,657	$2,912,560	$1,418,257	$36,615,026
Shoe Stores - Retail Supply	$102,730	$245,456	$1,637,194	$5,919,009	$392,330	$8,169,542
Shoe Stores - Leakage / Surplus	$539,755	$703,438	($395,537)	($3,006,449)	$1,025,927	$28,445,484
Shoe Stores - No of Businesses	1	1	3	8	1	17
Retail Leakage per HH	$311	$270	($114)	($357)	$259	$269
Retail Leakage per Sq Mi	$220,308	$24,892	($5,039)	($9,575)	$9,034	$14,495
HHs per Retail Business	1,735	2,610	1,154	1,053	3,963	6,227
Retailers per Sq Mile	0.4	0.0	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$102,730	$245,456	$545,731	$739,876	$392,330	$480,561
Jewelry & Leather - Consumer Demand	$682,517	$1,005,576	$1,305,680	$3,044,655	$1,487,896	$38,711,942
Jewelry & Leather - Retail Supply	$0	$331,223	$1,947,937	$6,506,563	$514,644	$20,244,608
Jewelry & Leather - Leakage / Surplus	$682,517	$674,353	($642,257)	($3,461,908)	$973,252	$18,467,334
Jewelry & Leather - No of Businesses	0	1	3	5	2	40
Retail Leakage per HH	$393	$258	($186)	($411)	$246	$174
Retail Leakage per Sq Mi	$278,578	$23,862	($8,182)	($11,025)	$8,570	$9,410
HHs per Retail Business	0	2,610	1,154	1,685	1,982	2,647
Retailers per Sq Mile	0.0	0.0	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$0	$331,223	$649,312	$1,301,313	$257,322	$506,115

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Sport Gds & Hobby - Consumer Demand	$1,390,728	$2,050,576	$2,677,510	$6,316,438	$3,065,241	$78,384,933
Sport Gds & Hobby - Retail Supply	$130,093	$314,900	$624,683	$1,155,531	$612,066	$29,563,090
Sport Gds & Hobby - Leakage / Surplus	$1,260,635	$1,735,676	$2,052,827	$5,160,907	$2,453,175	$48,821,843
Sport Gds & Hobby - No of Businesses	2	3	6	11	7	111
Retail Leakage per HH	$727	$665	$593	$613	$619	$461
Retail Leakage per Sq Mi	$514,545	$61,418	$26,151	$16,436	$21,602	$24,877
HHs per Retail Business	868	870	577	766	566	954
Retailers per Sq Mile	0.8	0.1	0.1	0.0	0.1	0.1
Avg Sales per Retailer/Year	$65,047	$104,967	$104,114	$105,048	$87,438	$266,334
Books & Music - Consumer Demand	$399,608	$588,699	$765,674	$1,794,992	$875,667	$22,372,085
Books & Music - Retail Supply	$0	$0	$107,175	$818,950	$140,567	$6,510,147
Books & Music - Leakage / Surplus	$399,608	$588,699	$658,499	$976,042	$735,100	$15,861,938
Books & Music - No of Businesses	0	0	1	5	2	27
Retail Leakage per HH	$230	$226	$190	$116	$185	$150
Retail Leakage per Sq Mi	$163,105	$20,832	$8,389	$3,108	$6,473	$8,083
HHs per Retail Business	0	0	3,461	1,685	1,982	3,921
Retailers per Sq Mile	0.0	0.0	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$0	$0	$107,175	$163,790	$70,284	$241,117
Department Stores - Consumer Demand	$5,111,643	$7,511,843	$9,801,621	$23,134,523	$11,222,576	$284,766,267
Department Stores - Retail Supply	$0	$591,595	$1,005,711	$1,043,139	$1,005,712	$148,170,944
Department Stores - Leakage / Surplus	$5,111,643	$6,920,248	$8,795,910	$22,091,384	$10,216,864	$136,595,323
Department Stores - No of Businesses	0	1	1	1	1	18
Retail Leakage per HH	$2,946	$2,651	$2,541	$2,622	$2,578	$1,290
Retail Leakage per Sq Mi	$2,086,385	$244,878	$112,050	$70,355	$89,969	$69,603
HHs per Retail Business	0	2,610	3,461	8,425	3,963	5,881
Retailers per Sq Mile	0.0	0.0	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$0	$591,595	$1,005,711	$1,043,139	$1,005,712	$8,231,719

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
General Merchandise - Consumer Demand	$5,131,709	$7,533,608	$9,853,769	$23,435,975	$11,301,884	$292,098,891
General Merchandise - Retail Supply	$0	$0	$0	$618,912	$0	$107,059,139
General Merchandise - Leakage / Surplus	$5,131,709	$7,533,608	$9,853,769	$22,817,063	$11,301,884	$185,039,752
General Merchandise - No of Businesses	0	0	0	1	0	21
Retail Leakage per HH	$2,958	$2,886	$2,847	$2,708	$2,852	$1,748
Retail Leakage per Sq Mi	$2,094,575	$266,582	$125,526	$72,666	$99,523	$94,288
HHs per Retail Business	0	0	0	8,425	0	5,041
Retailers per Sq Mile	0.0	0.0	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$0	$0	$0	$618,912	$0	$5,098,054
Florists - Consumer Demand	$112,626	$164,588	$217,808	$527,370	$251,304	$6,201,714
Florists - Retail Supply	$79,196	$181,614	$290,266	$310,234	$283,947	$5,034,325
Florists - Leakage / Surplus	$33,430	($17,026)	($72,458)	$217,136	($32,643)	$1,167,389
Florists - No of Businesses	1	1	2	2	2	30
Retail Leakage per HH	$19	($7)	($21)	$26	($8)	$11
Retail Leakage per Sq Mi	$13,645	($602)	($923)	$692	($287)	$595
HHs per Retail Business	1,735	2,610	1,731	4,213	1,982	3,529
Retailers per Sq Mile	0.4	0.0	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$79,196	$181,614	$145,133	$155,117	$141,974	$167,811
Office Supply & Gifts - Consumer Demand	$573,593	$843,009	$1,102,628	$2,617,840	$1,262,352	$32,964,853
Office Supply & Gifts - Retail Supply	$20,387	$23,749	$44,763	$200,353	$55,386	$14,901,835
Office Supply & Gifts - Leakage / Surplus	$553,206	$819,260	$1,057,865	$2,417,487	$1,206,966	$18,063,018
Office Supply & Gifts - No of Businesses	1	1	1	6	3	91
Retail Leakage per HH	$319	$314	$306	$287	$305	$171
Retail Leakage per Sq Mi	$225,798	$28,990	$13,476	$7,699	$10,628	$9,204
HHs per Retail Business	1,735	2,610	3,461	1,404	1,321	1,163
Retailers per Sq Mile	0.4	0.0	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$20,387	$23,749	$44,763	$33,392	$18,462	$163,756

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Used Merchandise - Consumer Demand	$294,659	$434,035	$565,479	$1,328,424	$646,620	$17,277,790
Used Merchandise - Retail Supply	$71,772	$100,950	$109,319	$432,714	$102,207	$13,022,145
Used Merchandise - Leakage / Surplus	$222,887	$333,085	$456,160	$895,710	$544,413	$4,255,645
Used Merchandise - No of Businesses	1	2	2	6	2	88
Retail Leakage per HH	$128	$128	$132	$106	$137	$40
Retail Leakage per Sq Mi	$90,974	$11,786	$5,811	$2,853	$4,794	$2,168
HHs per Retail Business	1,735	1,305	1,731	1,404	1,982	1,203
Retailers per Sq Mile	0.4	0.1	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$71,772	$50,475	$54,660	$72,119	$51,104	$147,979
Misc. Retailers - Consumer Demand	$1,322,855	$1,933,952	$2,532,931	$6,137,155	$2,915,353	$76,838,520
Misc. Retailers - Retail Supply	$245,262	$941,585	$5,781,289	$19,949,815	$1,374,028	$67,408,048
Misc. Retailers - Leakage / Surplus	$1,077,593	$992,367	($3,248,358)	($13,812,660)	$1,541,325	$9,430,472
Misc. Retailers - No of Businesses	2	3	5	12	4	171
Retail Leakage per HH	$621	$380	($939)	($1,639)	$389	$89
Retail Leakage per Sq Mi	$439,834	$35,116	($41,380)	($43,989)	$13,573	$4,805
HHs per Retail Business	868	870	692	702	991	619
Retailers per Sq Mile	0.8	0.1	0.1	0.0	0.0	0.1
Avg Sales per Retailer/Year	$122,631	$313,862	$1,156,258	$1,662,485	$343,507	$394,199
Full-Service Dining - Consumer Demand	$4,024,333	$5,932,900	$7,740,297	$18,173,296	$8,845,443	$228,290,849
Full-Service Dining - Retail Supply	$1,993,850	$3,274,200	$3,396,337	$10,713,181	$3,362,965	$193,572,054
Full-Service Dining - Leakage / Surplus	$2,030,483	$2,658,700	$4,343,960	$7,460,115	$5,482,478	$34,718,795
Full-Service Dining - No of Businesses	1	2	2	6	3	135
Retail Leakage per HH	$1,170	$1,019	$1,255	$885	$1,383	$328
Retail Leakage per Sq Mi	$828,769	$94,080	$55,337	$23,758	$48,278	$17,691
HHs per Retail Business	1,735	1,305	1,731	1,404	1,321	784
Retailers per Sq Mile	0.4	0.1	0.0	0.0	0.0	0.1
Avg Sales per Retailer/Year	$1,993,850	$1,637,100	$1,698,169	$1,785,530	$1,120,988	$1,433,867

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Limited-Serve Dining - Consumer Demand	$3,281,382	$4,834,219	$6,305,466	$14,828,472	$7,208,711	$184,315,129
Limited-Serve Dining - Retail Supply	$2,306,254	$4,293,795	$5,280,465	$6,114,934	$5,079,774	$100,236,206
Limited-Serve Dining - Leakage / Surplus	$975,128	$540,424	$1,025,001	$8,713,538	$2,128,937	$84,078,923
Limited-Serve Dining - No of Businesses	4	5	6	9	6	134
Retail Leakage per HH	$562	$207	$296	$1,034	$537	$794
Retail Leakage per Sq Mi	$398,011	$19,123	$13,057	$27,750	$18,747	$42,843
HHs per Retail Business	434	522	577	936	661	790
Retailers per Sq Mile	1.6	0.2	0.1	0.0	0.1	0.1
Avg Sales per Retailer/Year	$576,564	$858,759	$880,078	$679,437	$846,629	$748,031
Special Food Services - Consumer Demand	$371,354	$548,827	$716,530	$1,679,625	$820,495	$20,356,128
Special Food Services - Retail Supply	$2,809,758	$5,057,549	$5,057,549	$5,057,549	$5,057,564	$17,158,817
Special Food Services - Leakage / Surplus	($2,438,404)	($4,508,722)	($4,341,019)	($3,377,924)	($4,237,069)	$3,197,311
Special Food Services - No of Businesses	1	1	1	1	1	26
Retail Leakage per HH	($1,405)	($1,727)	($1,254)	($401)	($1,069)	$30
Retail Leakage per Sq Mi	($995,267)	($159,544)	($55,300)	($10,758)	($37,311)	$1,629
HHs per Retail Business	1,735	2,610	3,461	8,425	3,963	4,072
Retailers per Sq Mile	0.4	0.0	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$2,809,758	$5,057,549	$5,057,549	$5,057,549	$5,057,564	$659,955
Drinking Places - Consumer Demand	$182,824	$270,375	$353,361	$826,028	$403,276	$10,354,865
Drinking Places - Retail Supply	$88,719	$95,188	$114,306	$632,564	$98,058	$13,202,419
Drinking Places - Leakage / Surplus	$94,105	$175,187	$239,055	$193,464	$305,218	($2,847,554)
Drinking Places - No of Businesses	1	1	1	2	1	54
Retail Leakage per HH	$54	$67	$69	$23	$77	($27)
Retail Leakage per Sq Mi	$38,410	$6,199	$3,045	$616	$2,688	($1,451)
HHs per Retail Business	1,735	2,610	3,461	4,213	3,963	1,960
Retailers per Sq Mile	0.4	0.0	0.0	0.0	0.0	0.0
Avg Sales per Retailer/Year	$88,719	$95,188	$114,306	$316,282	$98,058	$244,489

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Consumer Demand as a percent of the region						
Total Retail Trade & Food	1.8%	2.6%	3.4%	8.1%	3.9%	
Retail Trade Only	1.8%	2.6%	3.4%	8.1%	3.9%	
Food & Drink Only	1.8%	2.6%	3.4%	8.0%	3.9%	
Automobile Dealers	1.8%	2.6%	3.4%	8.2%	4.0%	
Other MV Dealers	1.7%	2.5%	3.3%	8.0%	3.8%	
Auto Parts & Accessories	1.8%	2.6%	3.5%	8.2%	4.0%	
Furniture Stores	1.8%	2.6%	3.4%	8.1%	3.9%	
Home Furnishings	1.8%	2.6%	3.4%	8.0%	3.9%	
Electronics/Appliances	1.8%	2.6%	3.4%	8.0%	3.9%	
Building Materials	1.7%	2.5%	3.2%	7.7%	3.7%	
Lawn & Garden Equipment & Supplies	1.6%	2.3%	3.1%	7.6%	3.6%	
Grocery Store	1.8%	2.6%	3.4%	8.1%	3.9%	
Specialty Food	1.8%	2.6%	3.4%	8.0%	3.9%	
Liquor & Wine Stores	1.8%	2.6%	3.4%	8.0%	3.9%	
Health & Personal Care	1.7%	2.5%	3.3%	8.0%	3.8%	
Gasoline Stations	1.8%	2.6%	3.4%	8.1%	3.9%	
Clothing Stores	1.8%	2.6%	3.4%	8.0%	3.9%	
Shoe Stores	1.8%	2.6%	3.4%	8.0%	3.9%	
Jewelry & Luggage	1.8%	2.6%	3.4%	7.9%	3.8%	
Sporting Goods, Toys & Hobby	1.8%	2.6%	3.4%	8.1%	3.9%	
Books & Music	1.8%	2.6%	3.4%	8.0%	3.9%	
Department Stores	1.8%	2.6%	3.4%	8.1%	3.9%	
General Merchandise	1.8%	2.6%	3.4%	8.0%	3.9%	
Florists	1.8%	2.7%	3.5%	8.5%	4.1%	
Office Supplies & Gifts	1.7%	2.6%	3.3%	7.9%	3.8%	
Used Merchandise	1.7%	2.5%	3.3%	7.7%	3.7%	
Miscellaneous Retailers	1.7%	2.5%	3.3%	8.0%	3.8%	
Full-Service Dining	1.8%	2.6%	3.4%	8.0%	3.9%	
Limited-Service Dining	1.8%	2.6%	3.4%	8.0%	3.9%	
Special Food Services	1.8%	2.7%	3.5%	8.3%	4.0%	
Drinking Places	1.8%	2.6%	3.4%	8.0%	3.9%	

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Retail Supply as a percent of the region						
Total Retail Trade & Food	1.0%	2.6%	4.8%	11.2%	3.3%	
Retail Trade Only	0.9%	2.4%	4.8%	11.8%	3.2%	
Food & Drink Only	2.2%	3.9%	4.3%	6.9%	4.2%	
Automobile Dealers	0.4%	0.5%	0.6%	0.9%	0.5%	
Other MV Dealers	0.0%	0.1%	0.1%	13.7%	0.0%	
Auto Parts & Accessories	0.0%	0.2%	0.5%	3.0%	0.3%	
Furniture Stores	2.3%	4.3%	4.5%	7.3%	4.5%	
Home Furnishings	0.0%	12.0%	18.4%	33.9%	12.5%	
Electronics/Appliances	1.2%	1.8%	1.9%	7.3%	2.1%	
Building Materials	8.5%	11.6%	15.7%	18.0%	14.4%	
Lawn & Garden Equipment & Supplies	0.0%	1.7%	3.8%	9.8%	4.6%	
Grocery Store	0.0%	3.5%	4.1%	5.7%	4.5%	
Specialty Food	0.0%	0.2%	0.3%	2.4%	0.4%	
Liquor & Wine Stores	0.7%	2.4%	4.3%	8.0%	4.7%	
Health & Personal Care	2.4%	7.0%	12.1%	13.9%	11.7%	
Gasoline Stations	3.1%	3.4%	4.3%	6.8%	4.2%	
Clothing Stores	0.1%	1.9%	18.9%	70.7%	2.7%	
Shoe Stores	1.3%	3.0%	20.0%	72.5%	4.8%	
Jewelry & Luggage	0.0%	1.6%	9.6%	32.1%	2.5%	
Sporting Goods, Toys & Hobby	0.4%	1.1%	2.1%	3.9%	2.1%	
Books & Music	0.0%	0.0%	1.6%	12.6%	2.2%	
Department Stores	0.0%	0.4%	0.7%	0.7%	0.7%	
General Merchandise	0.0%	0.0%	0.0%	0.6%	0.0%	
Florists	1.6%	3.6%	5.8%	6.2%	5.6%	
Office Supplies & Gifts	0.1%	0.2%	0.3%	1.3%	0.4%	
Used Merchandise	0.6%	0.8%	0.8%	3.3%	0.8%	
Miscellaneous Retailers	0.4%	1.4%	8.6%	29.6%	2.0%	
Full-Service Dining	1.0%	1.7%	1.8%	5.5%	1.7%	
Limited-Service Dining	2.3%	4.3%	5.3%	6.1%	5.1%	
Special Food Services	16.4%	29.5%	29.5%	29.5%	29.5%	
Drinking Places	0.7%	0.7%	0.9%	4.8%	0.7%	

Centreville, MD	**Town of Centreville**	**3.0-mile Radius**	**5.0-mile Radius**	**10.0-mile Radius**	**Trade Area (21617 Zip)**	**Region 25.0 mile radius**
Leakage as a percent of the region						
Total Retail Trade & Food	3.3%	2.6%	0.5%	1.5%	5.0%	
Retail Trade Only	3.5%	2.9%	0.5%	0.6%	5.2%	
Food & Drink Only	0.6%	-1.0%	1.1%	10.9%	3.1%	
Automobile Dealers	7.1%	10.9%	14.4%	36.2%	17.2%	
Other MV Dealers	-1.1%	-1.5%	-2.0%	17.6%	-2.5%	
Auto Parts & Accessories	3.1%	4.4%	5.6%	11.9%	6.6%	
Furniture Stores	-5.4%	-21.0%	-12.0%	19.6%	-4.4%	
Home Furnishings	3.8%	-8.2%	-13.8%	-21.7%	-6.0%	
Electronics/Appliances	1.9%	2.8%	3.7%	8.1%	4.2%	
Building Materials	-6.6%	-8.6%	-11.9%	-4.7%	-9.4%	
Lawn & Garden Equipment & Supplies	-1.6%	1.0%	4.6%	12.0%	5.6%	
Grocery Store	7.2%	-0.3%	1.4%	15.5%	2.2%	
Specialty Food	-14.2%	-18.9%	-25.0%	-43.0%	-27.4%	
Liquor & Wine Stores	9.5%	3.8%	-3.9%	8.0%	-2.6%	
Health & Personal Care	1.0%	-2.4%	-6.3%	1.5%	-4.8%	
Gasoline Stations	0.2%	1.7%	2.3%	9.6%	3.6%	
Clothing Stores	32.2%	15.5%	-286.3%	-1163.3%	26.6%	
Shoe Stores	1.9%	2.5%	-1.4%	-10.6%	3.6%	
Jewelry & Luggage	3.7%	3.7%	-3.5%	-18.7%	5.3%	
Sporting Goods, Toys & Hobby	2.6%	3.6%	4.2%	10.6%	5.0%	
Books & Music	2.5%	3.7%	4.2%	6.2%	4.6%	
Department Stores	3.7%	5.1%	6.4%	16.2%	7.5%	
General Merchandise	2.8%	4.1%	5.3%	12.3%	6.1%	
Florists	2.9%	-1.5%	-6.2%	18.6%	-2.8%	
Office Supplies & Gifts	3.1%	4.5%	5.9%	13.4%	6.7%	
Used Merchandise	5.2%	7.8%	10.7%	21.0%	12.8%	
Miscellaneous Retailers	11.4%	10.5%	-34.4%	-146.5%	16.3%	
Full-Service Dining	5.8%	7.7%	12.5%	21.5%	15.8%	
Limited-Service Dining	1.2%	0.6%	1.2%	10.4%	2.5%	
Special Food Services	-76.3%	-141.0%	-135.8%	-105.6%	-132.5%	
Drinking Places	-3.3%	-6.2%	-8.4%	-6.8%	-10.7%	

Centreville, MD	Town of Centreville	3.0-mile Radius	5.0-mile Radius	10.0-mile Radius	Trade Area (21617 Zip)	Region 25.0 mile radius
Businesses as a percent of the region						
Total Retail Trade & Food	1.5%	2.5%	4.0%	9.5%	3.4%	
Retail Trade Only	1.4%	2.5%	4.2%	10.3%	3.5%	
Food & Drink Only	2.0%	2.3%	2.9%	5.4%	3.1%	
Automobile Dealers	6.1%	6.1%	6.1%	15.2%	6.1%	
Other MV Dealers	0.0%	1.0%	1.0%	7.1%	0.0%	
Auto Parts & Accessories	0.0%	2.1%	2.1%	6.3%	2.1%	
Furniture Stores	2.2%	6.5%	6.5%	8.7%	6.5%	
Home Furnishings	0.0%	4.3%	5.7%	10.0%	2.9%	
Electronics/Appliances	2.8%	4.2%	4.2%	9.9%	4.2%	
Building Materials	1.8%	3.6%	4.5%	8.0%	3.6%	
Lawn & Garden Equipment & Supplies	0.0%	2.6%	7.7%	12.8%	5.1%	
Grocery Store	0.0%	1.6%	2.4%	5.6%	1.6%	
Specialty Food	0.0%	1.2%	1.2%	3.7%	1.2%	
Liquor & Wine Stores	2.2%	2.2%	2.2%	6.5%	2.2%	
Health & Personal Care	3.5%	3.5%	6.2%	10.6%	6.2%	
Gasoline Stations	4.1%	4.1%	6.1%	12.2%	6.1%	
Clothing Stores	0.7%	2.0%	7.4%	24.2%	2.7%	
Shoe Stores	5.9%	5.9%	17.6%	47.1%	5.9%	
Jewelry & Luggage	0.0%	2.5%	7.5%	12.5%	5.0%	
Sporting Goods, Toys & Hobby	1.8%	2.7%	5.4%	9.9%	6.3%	
Books & Music	0.0%	0.0%	3.7%	18.5%	7.4%	
Department Stores	0.0%	5.6%	5.6%	5.6%	5.6%	
General Merchandise	0.0%	0.0%	0.0%	4.8%	0.0%	
Florists	3.3%	3.3%	6.7%	6.7%	6.7%	
Office Supplies & Gifts	1.1%	1.1%	1.1%	6.6%	3.3%	
Used Merchandise	1.1%	2.3%	2.3%	6.8%	2.3%	
Miscellaneous Retailers	1.2%	1.8%	2.9%	7.0%	2.3%	
Full-Service Dining	0.7%	1.5%	1.5%	4.4%	2.2%	
Limited-Service Dining	3.0%	3.7%	4.5%	6.7%	4.5%	
Special Food Services	3.8%	3.8%	3.8%	3.8%	3.8%	
Drinking Places	1.9%	1.9%	1.9%	3.7%	1.9%	

APPENDIX D

Sample Eventbrite Invitation

Downtown Jamaica Broker/Developer Night

Greater Jamaica Development Corporation
Thursday, April 3, 2014 from 6:00 PM to 8:00 PM (EDT)
New York, NY

Greater Jamaica Development Corporation

Ticket Information

TYPE	REMAINING	END		QUANTITY
Reservation	Sold Out	Ended	Free	N/A

Who's Going

Connect to see which of your Facebook friends are going to Downtown Jamaica Broker/Developer Night.

Connect with Facebook

Event Details

The Greater Jamaica Development Corporation invites you to **Broker/Developer Night**. Join us for cocktails, barbeque, networking, and business leads. Meet commercial property owners. Find out what's happening in Downtown Jamaica. And get a list of the retail and restaurant prospects we'd like to see in Jamaica, together with all the information you need to attract them here. You must attend to get the list. Don't miss it!

JAMAICA MAKES IT HAPPEN!

Have questions about Downtown Jamaica Broker/Developer Night?
Contact Greater Jamaica Development Corporation

When & Where

CityRib
89-04 Parsons Blvd
New York, NY 11432

Thursday, April 3, 2014 from 6:00 PM to 8:00 PM (EDT)

Add to my calendar

Organizer

Greater Jamaica Development Corporation

Greater Jamaica Development Corporation is one of New York's oldest not-for-profit local development corporations. Since its founding in 1967, GJDC has stressed economic development as it pursues its community-building mission.

APPENDIX E

Marketing Samples

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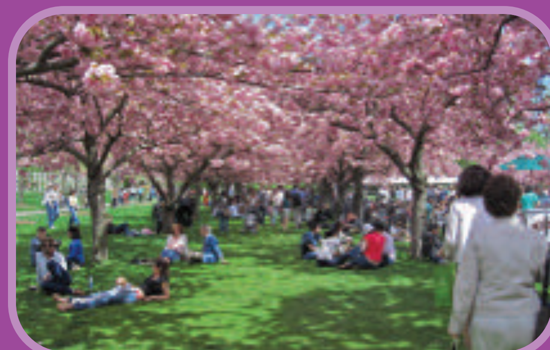
EXTRAORDINARY OPPORTUNITIES IN THE HEART OF BROOKLYN

PROSPECT HEIGHTS • CROWN HEIGHTS



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There are millions of reasons to open your business in the Heart of Brooklyn. Here are just a few...

LOCATION, LOCATION, LOCATION

Located in Prospect Heights and Crown Heights, Washington Avenue is a gateway to Brooklyn's treasured cultural institutions: Brooklyn Botanic Garden, Brooklyn Children's Museum, Brooklyn Museum, Brooklyn Public Library, Prospect Park, and Prospect Park Zoo. Additionally, at the northern edge of this ten-block commercial corridor sits the new Barclays Center sports and entertainment arena.

Washington Avenue is a vibrant corridor with rich cultural history, coffee shops, nightlife selections, boutiques and restaurants for every palate. Nowhere else in the nation are so many unique cultural assets embedded in one diverse local neighborhood. This combination enriches the area's life and visitor experience.

TOO MANY SHOPPERS, NOT ENOUGH STORES

Consumer demand in the area is so great that it drastically exceeds the available retail supply. **Within a 1-mile radius, $1.1 billion in retail sales leaks out of the area each year.** This $1.1 billion represents consumer spending on goods and services that aren't available in the area. Within a 3-mile radius, the amount of unmet demand is an incredible $4.5 billion a year.

Washington Avenue sits in the center of a large consumer base. Last year, within a 1-mile radius, consumer spending for retail goods and services exceeded $1.7 billion in 2011, including $271 million spent on dining. Consumers living within a 3-mile radius of Washington Avenue spend more than $9.6 billion annually on retail goods and services, which accounts for one-half of all consumer spending in Brooklyn.

EASY ACCESS TO A STRONG ECONOMY

Getting here is easy. Washington Avenue is well-served by public transportation, making the area readily accessible from everywhere in Manhattan and other boroughs. The area is served by 13 subway stations and 14 bus routes. Each year, more than 26 million people board at the local subways stations and more than 54 million people ride local bus routes.

By car, Washington Avenue is easily accessed from the Brooklyn-Queens Expressway and Prospect Expressway. Local streets also carry large amounts of vehicular traffic directly to Washington Avenue. Atlantic Avenue, for example, carries more than 52,000 vehicles daily, while an average of 45,000 vehicles traverse Eastern Parkway each day.

A LARGE CONSUMER AUDIENCE

Along Washington Avenue, you'll have several consumer audiences to attract to your store or restaurant. More than 151,000 residents live within 1 mile of Washington Avenue and more than 1.2 million live within 3 miles. **Within the 1 mile area, the average household income is $68,957 annually, 18% higher than the average for the entire borough of Brooklyn.**

In addition to the resident population, there are 3,800 businesses within 1 mile of Washington Avenue. Those businesses employ more than 30,600 people. Of that total, 35% are estimated to be office workers, who spend an average of $6,000/yr on retail goods and services where they work, resulting in another $64.2 million in annual purchases of retail goods and services.

Combined, the six cultural institutions that form the Heart of Brooklyn area generate more than 12.7 million visits to the area each year. That doesn't include visitors to the 18,000 seat Barclays Center which recently opened.

EXTRAORDINARY GROWTH OPPORTUNITIES

Right now, Washington Avenue offers extraordinary opportunities for retailers and restaurant operators:

- There are a limited number of available spaces on Washington Avenue ready for immediate occupancy, ranging from 450 to 2,200 square feet.
- Retail leakage, or unmet consumer demand, exists in many categories including specialty foods, clothing, shoes, jewelry and leather goods, home furnishings and home decor, among others. (See the back of this brochure for more information about retail leakage.)
- Young families with children is a growing segment of our audience. This is creating demand for boutiques, children's clothing, and furniture stores.

WE'LL HELP YOU FIND YOUR PLACE

The Heart of Brooklyn cultural partnership, in cooperation with NYC Small Business Services and the Washington Avenue-Prospect Heights Association, is working to recruit the best mix of retailers and restaurants for the corridor. Our goal is to create a retail mix that will attract diverse consumers from across Brooklyn and meet the needs of our residents. We're proactively business-friendly: we'll guide you through the business opening process; we are committed to the enhancement and maintenance of our business districts.

OPPORTUNITY IS KNOCKING

To learn more about the opportunities on Washington Avenue, call Rebeca Ramirez, Commercial Revitalization Manager at Heart of Brooklyn, to arrange a tour and receive our free market profile kit or visit us at **www.heartofbrooklyn.org/Your-Business-Here**.

HEART OF BROOKLYN
A CULTURAL PARTNERSHIP
789 Washington Avenue
Brooklyn, New York 11238

In cooperation with...

NYC Small Business Services

Call Rebeca Ramirez at (718) 638-7700 ext. 11
or email at *rramirez@heartofbrooklyn.org* or visit
www.heartofbrooklyn.org/Your-Business-Here

Washington Avenue Area Map & Essential Facts & Figures

Heart of Brooklyn cultural institutions

1. **Brooklyn Botanic Garden** 725,000 annual visitors
2. **Brooklyn Children's Museum** 251,000 annual visitors
3. **Brooklyn Museum** 493,000 annual visitors
4. **Prospect Park** 526 ac. park, 10 million annual visits
5. **Prospect Park Zoo** 12 ac. zoo, 305,000 annual visitors
6. **Brooklyn Public Library** 1 million annual visitors

Transportation and access

7. **Atlantic Avenue at Grand Ave** 52,700 vehicles/day
8. **Eastern Pkwy at Washington Ave** 45,300 vehicles/day
9. **Flatbush Ave at Grand Army Plaza** 42,800 vehicles/day
10. **Franklin Av Subway** (2/3/4/5 train) 14,700 wkday brdngs
11. **Grand Army Subway** (2/3 train) 7,800 wkday brdngs
12. **Park Place Subway** (S train) 2,200 weekday boardings
13. **Prospect Pk Subway** (B/Q/S train) 8,500 wkday brdngs
14. **7th Ave Subway** (F/G train) 12,700 wkday boardings
15. **Washington Avenue** 9,700 vehicles/day

Additional destinations and attractions

16. **Barclays Center** 18,000 seat sports/entertainment arena
17. **Brooklyn Academy of Music** 675,000 annual visitors

Demographics *SOURCE: ESRI 2011*	**1 mile**	**2 miles**	**3 miles**
Population (2011)	151,985	588,309	1,226,225
Households (2011)	67,046	235,247	460,889
Average household size (persons)	2.23	2.45	2.61
Median age (years)	35.0	33.7	33.1
Average household income	$68,957	$61,307	$56,619
Median household income	$45,642	$39,528	$36,333

Retail Supply & Demand (in millions of dollars)

Total consumer retail demand	$1,734	$5,227	$9,643
Total retailer sales	$619	$2,521	$5,077
Unmet consumer retail demand	$1,114	$2,755	$4,566

Consumer Spending (in millions of dollars)

Spending on children's clothing	$20	$67	$123
Spending on toys and games	$9	$30	$55
Spending on child care	$31	$96	$174

Retail Leakage (amount of demand above existing sales, in millions of dollars)

Unmet demand: clothing	$40	$75	$161
Unmet demand: full-service restaurants	$63	$169	$630
Unmet demand: furniture	$24	$56	$29
Unmet demand: health & personal care	$27	$51	$106
Unmet demand: home furnishings	$16	$37	$41
Unmet demand: jewelry & leather goods	$6	$11	$17
Unmet demand: shoes	$6	$9	$17
Unmet demand: specialty food	$29	$65	$97

© Chuck Choi

Courtesy Brooklyn Public Library

Julie Larsen Maher/WCS

HEART OF BROOKLYN
A CULTURAL PARTNERSHIP

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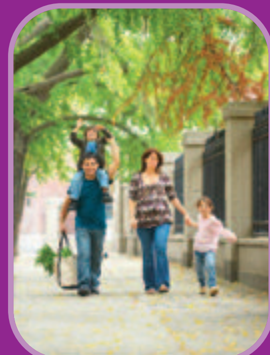
In cooperation with...

NYC Small Business Services

789 Washington Avenue
Brooklyn, New York 11238

© Adam Husted

Courtesy Brooklyn Public Library



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EXTRAORDINARY OPPORTUNITIES IN THE HEART OF BROOKLYN

PROSPECT HEIGHTS · CROWN HEIGHTS

So many shoppers Not enough stores

If you're looking for a high-traffic location for your business, you need to look at Washington Avenue in the Prospect Heights and Crown Heights area. Washington Avenue is a vibrant corridor with rich cultural history, coffee shops, nightlife selections, boutiques and restaurants.

Washington Avenue is a gateway to Brooklyn's most treasured cultural institutions and sits at the center of a large consumer population. More than 151,000 residents live within a mile and more than 1.2 million live within 3 miles.

In addition to the resident population, there are 3,800 businesses within a mile that employ more than 30,600 people who spend $64.2 million a year on retail goods and services where they work. Combined, the six cultural institutions that form the Heart of Brooklyn generate more than 12.7 million visits to the area. That doesn't include visitors to the 18,000 seat Barclays Center which recently opened.

There's so much retail opportunity that consumer demand, within 1 mile, exceeds retail supply by $1.1 billion annually. Retail leakage, or unmet demand, exists in many categories including specialty foods, clothing, shoes, home decor, and more.

To take advantage of this opportunity, contact Rebeca Ramirez, Commercial Revitalization Manager at the Heart of Brooklyn, to arrange a tour and receive our free market profile kit.

In cooperation with...

NYC Small Business Services

HEART OF BROOKLYN
A CULTURAL PARTNERSHIP

789 Washington Avenue
Brooklyn, New York 11238

Contact Rebeca Ramirez at (718) 638-7700 ext. 11
rramirez@heartofbrooklyn.org
or visit **www.heartofbrooklyn.org/Your-Business-Here**

Heart of Brooklyn
C/O JGSC Group
Post Office Box 1148
Merchantville, NJ 08109

First-Class Mail
U.S. Postage Paid
Bellmawr, NJ
Permit No. 1474

RED BANK
NEW JERSEY

$5.8 billion
Consumer demand for retail goods and services in the trade area

$108,800
Average household income in the trade area

353,800
Population within 10 miles

41%
Households in the trade area with income of $100,000 or more

Nestled on a cozy nook just minutes from the Jersey Shore is a place that Smithsonian Magazine chose as one of the best small towns in America.

Each day our sidewalks come alive and offer visitors an experience that is as unique as our town itself. The only thing missing is your business. We invite you to change your scenery – and ours.

Located just 10 minutes from the Jersey Shore and an hour from New York City and Philadelphia, Red Bank is a hub for the arts and culture, shopping and dining.

When you move your business to Red Bank, you'll be in great company. Your neighbors will be Tiffany & Company, Carlo's Bakery, underground legends like Jay and Silent Bob's Secret Stash, city chic Coco Pearl, and stalwarts like Urban Outfitters, Alex and Ani, and West Elm.

Spring, summer and fall, Red Bank draws people downtown with al fresco dining, street musicians and entertainers, colorful decorations and lovingly tended floral displays. In winter, Red Bank becomes a holiday village with decorations and lights, carolers and musicians, horse drawn carriage rides, contests and free parking for shoppers.

So, if you're looking for a great place to do business, look here. To learn more or to arrange a tour, call us today.

redbank
a cool little town

732.842.4244 · www.redbank.org/rivercenter/

RED BANK
NEW JERSEY

IN A 10 MILE RADIUS

29,500	businesses
174,300	employees
353,800	population
134,400	households
$108,800	household income
$5.8	billion retail spending

FACTS & FIGURES

	3-MI	5-MI	10-MI
Population	54,600	134,700	353,800
Households	20,500	51,000	134,400
Median age	42.2	42.4	41.9
Households with children	34%	34%	34%
Home ownership	77%	75%	70%
Avg HH income	$128,000	$123,500	$108,800

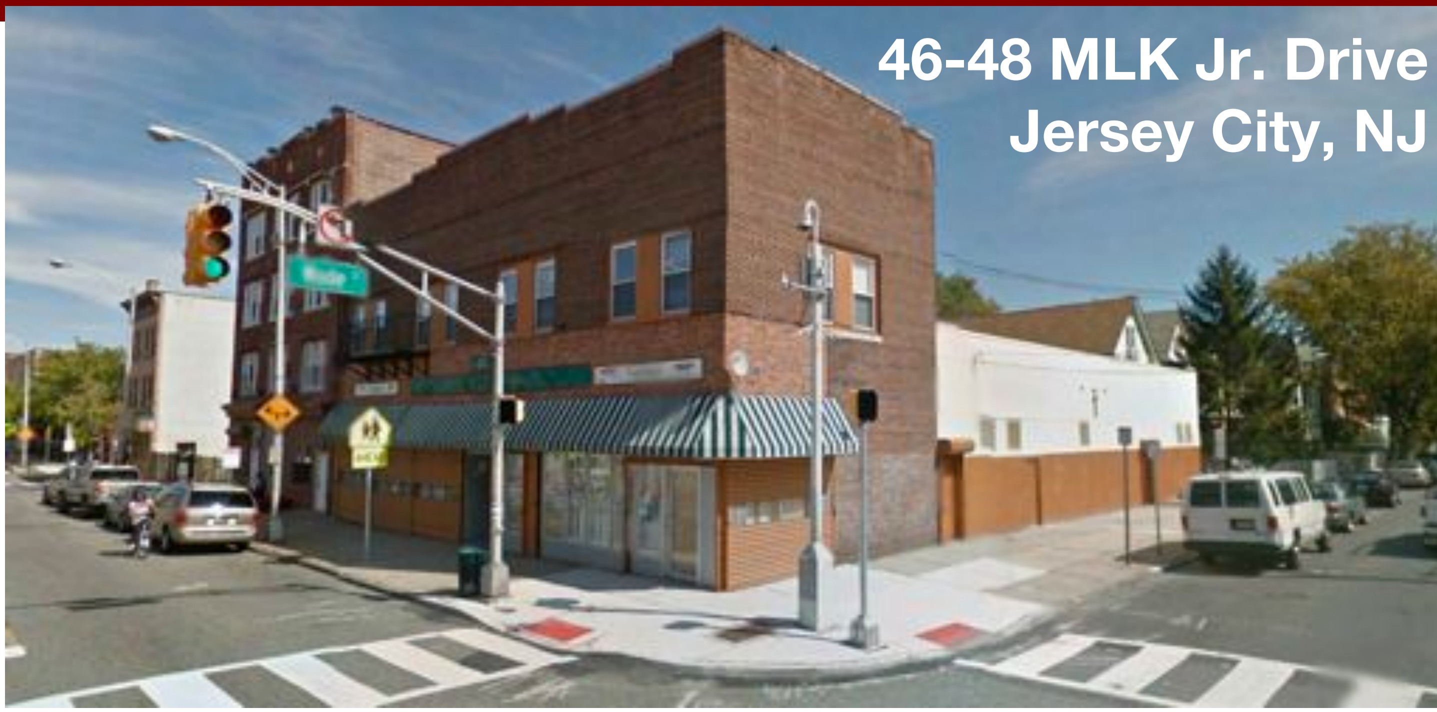
	3-MI	5-MI	10-MI
Consumer demand	$1.040 B	$2.493 B	$5.806 B
Retail supply	$952 M	$2.102 B	$5.818 B
Retail leakage	$87 M	$391 M	-$11 M
Spend on retail goods	$933 M	$2.237 B	$5.212 B
Spend on clothing	$68 M	$164 M	$382 M
Spend on food & drink	$106 M	$255 M	$594 M

	RED BANK
Total businesses	1,935
Total employees	12,298
Office workers	7,100
Workers' retail spending	$41,227,000

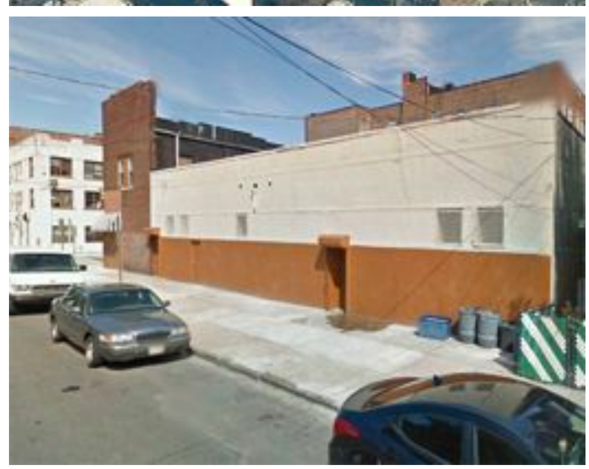
	VEHICLES/DAY
W Front at Riverside Ave	30,000
Riverside Ave at Allen Place	20,950
W Front at English Plaza	20,900
Maple Ave at Chestnut	20,100
Broad St at Leroy Place	13,300
Bridge Ave at Depot St	11,700

Red Bank RiverCenter
76 English Plaza
Red Bank, NJ 07701
732.842.4244
redbank.org

GROCERY OPPORTUNITY



- Corner property
- 7,660 sf GLA (6,000 sf on 1st floor)
- 15-ft height (1st floor) w/ new suspended ceiling
- Commercial kitchen w/ venting and fire suppression
- New 800 amp electrical service
- New central HVAC throughout 5 zones
- New Honeywell fire alarm system
- Digital CCTV (8 cameras) system
- 24-inch concrete foundation
- Prior uses: supermarket; day care center
- Available for lease or sale



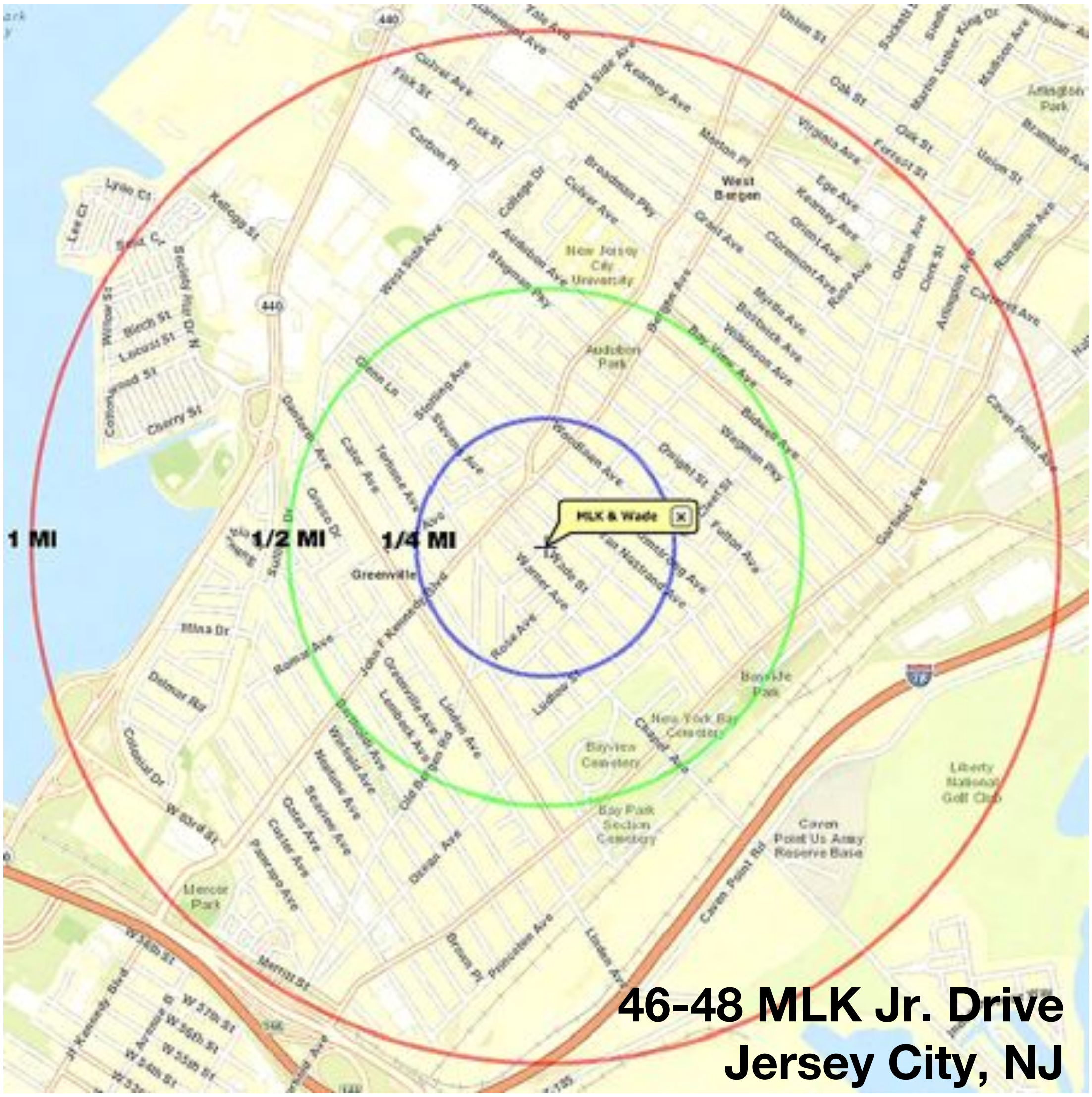
For more information contact:

Michele Massey at 201.984.0560

director@jacksonhillms.com

A Proud Past On A New Journey

JACKSON HILL
MAIN STREET



Corner of MLK Drive & Wade Street	0.25-Mile Radius	0.5-Mile Radius	1.0-Mile Radius
Population	7,234	25,472	60,122
Households	2,556	9,112	21,494
Population Density (per sq. mi.)	36,861	32,448	19,147
HH Density (per sq. mi.)	13,024	11,608	6,845
Median HH Income	$38,728	$41,605	$45,109
Average HH Income	$49,702	$58,316	$64,319
Grocery Stores: Consumer Demand	$8,830,658	$37,373,369	$94,716,217
Grocery Stores: Retail Supply	$6,585,246	$15,763,226	$87,827,375
Grocery Stores: Unmet Demand	**$2,245,412**	**$21,610,143**	**$6,888,842**
Spec. Food Stores: Consumer Demand	$358,072	$1,517,654	$94,716,217
Spec. Food Stores: Retail Supply	$84,213	$652,389	$87,827,375
Spec. Food Stores: Unmet Demand	**$273,859**	**$865,265**	**$6,888,842**

For more information contact:

Michele Massey at 201.984.0560

director@jacksonhillms.com

A Proud Past On A New Journey

JACKSON HILL
MAIN STREET

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