

bae urban economics

## West Baltimore Street Corridor Retail Market Study and Action Plan *for the Southwest Partnership*

September 21, 2022



# bae urban economics

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Tony Scott, Executive Director  
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Dear Mr. Scott:

BAE Urban Economics, in conjunction with KEWL Consulting, is pleased to submit this draft of the West Baltimore Street Commercial Corridor Market Study and Action Plan. This report includes a review of demographic and economic conditions and the real estate market in the study area, the results of a retail demand survey, a summary of input from stakeholder interviews, a review of key planned or potential developments in the area, and an action plan to be led by the Southwest Partnership.

Please contact me with any questions, comments and suggested edits. Thank you again for the opportunity to participate in this important work on behalf of the Southwest Partnership.

Sincerely,



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# INTRODUCTION

The purpose of this study is to describe and analyze the retail market for the West Baltimore Street commercial corridor and surrounding areas, the West Baltimore Street-Hollins Market Study Area, based on the characteristics of supply and demand and provide an action plan to help strengthen the local market, including new investment in the corridor. This study includes a substantial amount of community feedback on the retail market from an online survey, as well as interviews and focus groups held with key stakeholders, including residents, businesses, and property owners. The recommendations included in the action plan range from short-term (within 18 months) to medium-term (18 months to three years) to long-term (three years and beyond).

# METHODOLOGY

To perform the retail market analysis BAE prepared a demographic profile, a review of the retail and office real estate market, and a retail leakage analysis of the study area. BAE also administered and compiled the results of a survey on shopping and eating out at restaurants and conducted stakeholder interviews and focus groups, polling residents, as well as businesses and property owners on current conditions in the local retail market. Finally, BAE reviewed key planned and potential developments and their impact on the area.

## Definitions

In the market analysis included below there are a few terms that may be unfamiliar to some who review this report. These include the following:

**Non-family households** - A nonfamily household consists of a householder living alone (a one-person household) or where the householder shares the home exclusively with people to whom he/she is not related.<sup>1</sup>

**Absorption** - Absorption is the amount of space or units occupied within a market over a given period of time. Absorption considers both construction of new space and removal of existing space and/or units. Net Absorption is the net change in physically occupied space between the current measurement period and the last measurement period taking into consideration space vacated and newly constructed space in the same area during the same period.<sup>2</sup>

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<sup>1</sup> Source: U.S. Census

<sup>2</sup> Source: Metropolitan Council

**New Deliveries** - Buildings that complete construction during a specified period of time. In order for space to be considered delivered, a certificate of occupancy must have been issued for the property.<sup>3</sup>

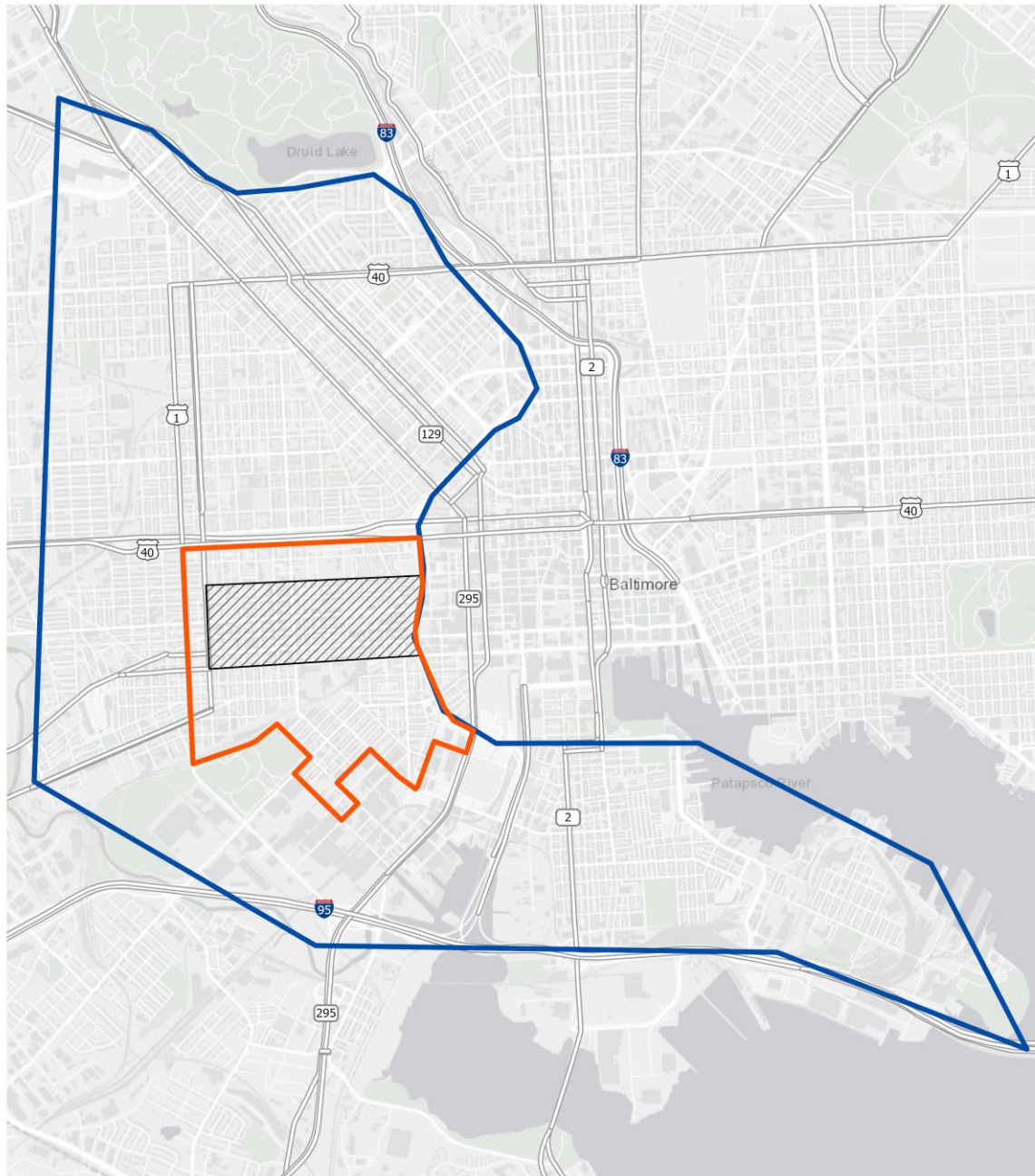
## EXISTING CONDITIONS AND RETAIL MARKET ANALYSIS




This section of the report summarizes data on existing conditions in the West Baltimore Street Study Area (“Study Area”), the Southwest Partnership neighborhoods (“Southwest Partnership”), and the West Baltimore Street Trade Area (“Trade Area”). These comparison geographies are illustrated in Figure 1. Data includes demographics, economics, and real estate market conditions. The focus of the study is to describe the retail market based on the characteristics of supply and demand. In addition to the data analysis, this study includes a significant amount of community feedback through an online survey, as well as interviews and focus groups held with key stakeholders, including residents, businesses, and property owners. This analysis uses data from Esri Business Analyst to describe the majority of demographic and economic conditions, with data calibrated specifically to the geographic boundaries shown in Figure 1. In addition, this analysis uses data from CoStar, a private data vendor, to document conditions in the real estate market, along with input from property owners, tenants, and other sources.

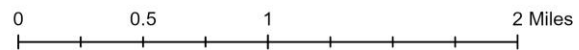
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<sup>3</sup> Source: TransWorld Commercial Real Estate.

**Figure 1: Map of Comparison Geographies**



-  West Baltimore Street Study Area
-  Southwest Partnership
-  West Baltimore Street Trade Area



Source: BAE, 2022.

## Population and Household Trends

The West Baltimore Street Study Area, the Southwest Partnership area and the West Baltimore Street Trade Area have all experienced population decline in the past decade, although the Study Area’s population decline is more modest. As shown in Table 1, the West Baltimore Street Trade Area, which includes both the West Baltimore Street Study Area and the Southwest Partnership neighborhoods, is the most populous area in the study, with 90,544 residents, down 3,000 residents (-3.2 percent) from 2010. The trade area comprises a much larger geography than the Southwest Partnership, which accounts for just 18.2 percent of Trade Area population and 17.3 percent of Trade Area households.

Household trends follow population trends across all three geographies. The average household size in the Study Area, at 2.32 people per household, is nearly identical to that of the Trade area, at 2.31, and very similar to the Southwest Partnership neighborhoods, which has a slightly larger Average Household Size of 2.40. From 2010 to 2021, Average Household Size has remained virtually unchanged for all geographies.

**Table 1: Population and Households, 2010-2021**

<b>Population</b>	<b>2010</b>	<b>2021</b>	<b>Change, 2010-2021</b>	
			<b>Number</b>	<b>Percent</b>
West Baltimore St. Study Area	5,620	5,550	-70	-1.2%
Southwest Partnership	16,976	16,439	-537	-3.2%
West Baltimore St. Trade Area	93,531	90,554	-2,977	-3.2%

<b>Households</b>	<b>2010</b>	<b>2021</b>	<b>Change, 2010-2021</b>	
			<b>Number</b>	<b>Percent</b>
West Baltimore St. Study Area	2,294	2,275	-19	-0.8%
Southwest Partnership	6,787	6,613	-174	-2.6%
West Baltimore St. Trade Area	38,987	38,193	-794	-2.0%

<b>Average Household Size</b>	<b>2010</b>	<b>2021</b>
West Baltimore St. Study Area	2.33	2.32
Southwest Partnership	2.42	2.40
West Baltimore St. Trade Area	2.34	2.31

Sources: Esri Business Analyst, 2021; BAE, 2022.

## Household Composition

Table 2 describes the composition of households in each geography. Notably, the majority of the decline in households in all three geographies comes from the loss of family households. While the Study Area saw a small decline in both family and non-family households, the Southwest Partnership and the West Baltimore Street Trade Area both saw a steeper decline in households overall (2.6 percent and 2.0 percent, respectively) and a more pronounced decline in family households (3.3 percent and 4.4 percent, respectively).



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**Table 2: Household Composition, 2010-2021**

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<b>West Baltimore St. Study Area</b>	<b>2010</b>	<b>2021</b>	<b>Change, 2010-2021</b>	
			<b>Number</b>	<b>Percent</b>
Family Households	1,026	1,016	-10	-1.0%
Non-Family Households	1,268	1,259	-9	-0.7%
<b>Total Households</b>	<b>2,294</b>	<b>2,275</b>	<b>-19</b>	<b>-0.8%</b>

<b>Southwest Partnership</b>	<b>2010</b>	<b>2021</b>	<b>Change, 2010-2021</b>	
			<b>Number</b>	<b>Percent</b>
Family Households	3,496	3,379	-117	-3.3%
Non-Family Households	3,291	3,234	-57	-1.7%
<b>Total Households</b>	<b>6,787</b>	<b>6,613</b>	<b>-174</b>	<b>-2.6%</b>

<b>West Baltimore St. Trade Area</b>	<b>2010</b>	<b>2021</b>	<b>Change, 2010-2021</b>	
			<b>Number</b>	<b>Percent</b>
Family Households	19,070	18,233	-837	-4.4%
Non-Family Households	19,917	19,960	43	0.2%
<b>Total Households</b>	<b>38,987</b>	<b>38,193</b>	<b>-794</b>	<b>-2.0%</b>

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Sources: U.S. Census Bureau, 2010 Decennial Census, Table P9; American Community Survey, 2014-2019 five-year sample data, B03002, BAE, 2021

## Housing Units by Tenure

Despite the net decline in households, there was a net gain in owner households in all three geographies, including a 12.9 percent increase in owner households in the Study Area, a 10.3 percent increase in the Southwest Partnership neighborhoods, and a 6.7 percent increase in the Trade Area. Of the 239 net increase in owner households in the Southwest Partnership, 33.5 percent were in the Study Area, which is in line with the share of Southwest Partnership households in the Study Area.

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**Table 3: Housing Units by Tenure, 2010-2021**

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	2010		2021		2010-2021 Change	
	Number	Percent	Number	Percent	Number	Percent
<b>West Baltimore St. Study Area</b>						
Owner-Occupied Units	618	26.9%	698	30.7%	80	12.9%
Renter-Occupied Units	1,676	73.1%	1,577	69.3%	-99	-5.9%
<b>Total Households</b>	<b>2,294</b>	<b>100.0%</b>	<b>2,275</b>	<b>100.0%</b>	<b>-19</b>	<b>-0.8%</b>
	2010		2021		2010-2021 Change	
	Number	Percent	Number	Percent	Number	Percent
<b>Southwest Partnership</b>						
Owner-Occupied Units	2,331	34.3%	2,570	38.9%	239	10.3%
Renter-Occupied Units	4,456	65.7%	4,043	61.1%	-413	-9.3%
<b>Total Households</b>	<b>6,787</b>	<b>100.0%</b>	<b>6,613</b>	<b>100.0%</b>	<b>-174</b>	<b>-2.6%</b>
	2010		2021		2010-2021 Change	
	Number	Percent	Number	Percent	Number	Percent
<b>West Baltimore St. Trade Area</b>						
Owner-Occupied Units	14,662	37.6%	15,644	41.0%	982	6.7%
Renter-Occupied Units	24,325	62.4%	22,550	59.0%	-1,775	-7.3%
<b>Total Households</b>	<b>38,987</b>	<b>100.0%</b>	<b>38,194</b>	<b>100.0%</b>	<b>-793</b>	<b>-2.0%</b>

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Source: Esri Business Analyst, 2021; BAE, 2022.

## Household Income

Across both the West Baltimore Street Study Area and the Southwest Partnership, household incomes show no meaningful difference between one another, with a median household income of \$28,294 in the Study Area and \$30,285 in the Southwest Partnership, and a per capita income of \$23,686 and \$22,347, respectively. By comparison, the 2020 median household income for Baltimore City, as reported by the U.S. Census, is \$52,164.

The distribution of households across income categories in the Study Area and the Southwest Partnership area is similar, as well, with more than half of households in both geographies earning less than \$35,000 a year. Despite the relatively large number of households earning less than \$35,000, a notable proportion of households in both the Study Area and the Southwest Partnership area earn between \$50,000 and \$74,999 a year. Similarly, despite high percentages of lower income households, over 15 percent of households in both geographies earn more than \$100,000. Low incomes may limit the potential for capturing more retail spending, but the share of higher income households could represent demand capture potential from households with disposable income

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**Table 4: Household Income, 2021**

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<b>Income Category</b>	<b>West Baltimore St. Study Area</b>		<b>Southwest Partnership</b>	
	<b>Number</b>	<b>Percent</b>	<b>Number</b>	<b>Percent</b>
Less than \$15,000	725	31.9%	2,063	31.2%
\$15,000-\$24,999	289	12.7%	738	11.2%
\$25,000-\$34,999	307	13.5%	842	12.7%
\$35,000-\$49,999	147	6.5%	627	9.5%
\$50,000-\$74,999	276	12.1%	801	12.1%
\$75,000-\$99,999	184	8.1%	480	7.3%
\$100,000-\$149,999	194	8.5%	615	9.3%
\$150,000-\$199,999	34	1.5%	193	2.9%
\$200,000 or more	118	5.2%	254	3.8%
<b>Total Households (a)</b>	<b>2,274</b>	<b>100.0%</b>	<b>6,613</b>	<b>100.0%</b>
<b>Median HH Income</b>	<b>\$28,294</b>		<b>\$30,285</b>	
<b>Per Capita Income</b>	<b>\$23,686</b>		<b>\$22,347</b>	

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Note:

(a) Totals may not match totals in other tables due to independent rounding.

Sources: Esri Business Analyst, 2021; BAE, 2022.

## Age Distribution

The Study Area has the oldest median age, at 38.1 years, compared to 35.3 and 35.8, respectively, in the Southwest Partnership area and the West Baltimore Street Trade Area. The younger median age in the Study Area can be explained through the variance in age distribution across geographies. The Study Area has the fewest children under 18, at 19.8 percent, and the smallest share of 25-34 year old residents, as well as larger shares of 45-64 year old residents. The Study Area has the same share of seniors over 65 compared to the Southwest Partnership area, but a slightly larger share of residents between 55 and 64 years of age, which helps explain the slightly older median age. Overall, however, as shown in Table 5, the age distribution is similar across all three geographies.

**Table 5: Age Distribution**

Age Distribution	West Baltimore St. Study Area		Southwest Partnership		West Baltimore St. Trade Area	
	Number	Percent	Number	Percent	Number	Percent
Under 18	1,098	19.8%	3,667	22.3%	18,426	20.3%
18-24	519	9.4%	1,543	9.4%	8,699	9.6%
25-34	901	16.2%	2,930	17.8%	17,061	18.8%
35-44	766	13.8%	2,198	13.4%	11,717	12.9%
45-54	777	14.0%	2,054	12.5%	10,052	11.1%
55-64	777	14.0%	2,004	12.2%	11,403	12.6%
65 or older	710	12.8%	2,044	12.4%	13,195	14.6%
<b>Total Population (a)</b>	<b>5,548</b>	<b>100.0%</b>	<b>16,440</b>	<b>100.0%</b>	<b>90,553</b>	<b>100.0%</b>
<b>Median Age</b>	<b>38.1</b>		<b>35.3</b>		<b>35.8</b>	

Note:

(a) Totals may not match total in other tables due to independent rounding.

Sources: Esri Business Analyst, 2021; BAE, 2022.

## Race and Ethnicity

Trends in the racial and ethnic distribution, as shown in Table 6, reveal that all three areas are predominantly Black/African American, accounting for over three-quarters of the Study Area population, which has the largest share of Black residents (76.7 percent), and correspondingly the smallest share of Non-Hispanic White residents (15.3 percent). The Southwest Partnership area has the largest share of Hispanic or Latino residents (5.3 percent), although the share is much smaller than the Black (68.3 percent) and non-Hispanic White population (20.6 percent). The Trade Area has the largest share of non-Hispanic White residents (26.8 percent), and the smallest share of Hispanic/Latino (3.3 percent) and Black residents (65.6 percent).

**Table 6: Race and Ethnicity**

Race and Ethnicity	West Baltimore St. Study Area		Southwest Partnership		West Baltimore St. Trade Area	
	Number	Percent	Number	Percent	Number	Percent
<b>Hispanic/Latino (a)</b>	<b>219</b>	<b>3.9%</b>	<b>877</b>	<b>5.3%</b>	<b>2,946</b>	<b>3.3%</b>
<b>Not Hispanic/Latino</b>	<b>5,331</b>	<b>96.1%</b>	<b>15,563</b>	<b>94.7%</b>	<b>87,608</b>	<b>96.7%</b>
White	848	15.3%	3,387	20.6%	24,255	26.8%
Black/African American	4,258	76.7%	11,227	68.3%	59,420	65.6%
Native American	25	0.5%	69	0.4%	210	0.2%
Asian	80	1.4%	432	2.6%	1,779	2.0%
Native Hawaiian/Pacific Islander	1	0.0%	3	0.0%	22	0.0%
Other	8	0.1%	28	0.2%	112	0.1%
Two or More Races	111	2.0%	417	2.5%	1,810	2.0%
<b>Total Population (b)</b>	<b>5,550</b>	<b>100.0%</b>	<b>16,440</b>	<b>100.0%</b>	<b>90,554</b>	<b>100.0%</b>

Notes:

(a) Includes all races for those of Hispanic/Latino background.

(b) Totals may not match totals in other tables due to independent rounding.

Sources: Esri Business Analyst, 2021; BAE, 2022.

## Educational Attainment

The Study Area has a higher share of high school graduates (80 percent vs. 76.4 percent) and similar share of residents with a bachelor's degree (23.5 percent vs. 23.1 percent) when compared to the Southwest Partnership area. While a relatively small share of residents in all three geographies have an associate degree, around four percent in all geographies, a notable proportion attended college but do not have a degree. The Trade Area has the largest share of residents with a bachelor's degree or higher, at 31.7 percent of residents.

**Table 7: Educational Attainment**

<b>Educational Attainment</b>	<b>West Baltimore St. Study Area</b>		<b>Southwest Partnership</b>		<b>West Baltimore St. Trade Area</b>	
	<b>Number</b>	<b>Percent</b>	<b>Number</b>	<b>Percent</b>	<b>Number</b>	<b>Percent</b>
Less than 9th Grade	270	6.9%	778	6.9%	3,121	4.9%
9th to 12th Grade, No Diploma	501	12.7%	1,917	17.1%	8,290	13.1%
High School Graduate (incl. Equivalency)	1,383	35.2%	3,723	33.2%	18,587	29.3%
Some College, No Degree	687	17.5%	1,797	16.0%	10,618	16.7%
Associate Degree	165	4.2%	417	3.7%	2,698	4.3%
Bachelor's Degree	465	11.8%	1,472	13.1%	10,799	17.0%
Graduate/Professional Degree	460	11.7%	1,126	10.0%	9,316	14.7%
<b>Total Population Age 25+</b>	<b>3,931</b>	<b>100.0%</b>	<b>11,230</b>	<b>100.0%</b>	<b>63,429</b>	<b>100.0%</b>
<b>Population 25+ High School Graduate (incl. Equivalency) or Higher (%)</b>	<b>80.4%</b>		<b>76.0%</b>		<b>82.0%</b>	
<b>Population 25+ with Bachelor's Degree or Higher (%)</b>	<b>23.5%</b>		<b>23.1%</b>		<b>31.7%</b>	

Sources: Esri Business Analyst, 2021; BAE, 2022.

## Housing Units by Year Built

Across all geographies, the housing stock is quite old, with about 55 percent of housing units built in 1939 or earlier in the Study Area, 56 percent in the Southwest Partnership neighborhoods, and 64 percent in the Trade Area. The Study Area and the Southwest Partnership area have higher shares of housing units built between 1940 and 1999, at nearly 40 percent. However, a larger share of housing units in the Trade Area were built after 2000 than in the Study Area or Southwest Partnership area, including less than five percent of Study Area housing units. This suggests the construction boom of the early 2000s did not impact any of the three geographies, an indication that these Baltimore neighborhoods were mostly built out by 2000.

**Table 8: Housing Units by Year Built**

Year Built	West Baltimore St. Study Area		Southwest Partnership		West Baltimore St. Trade Area	
	Number	Percent	Number	Percent	Number	Percent
1939 or Earlier	1,792	54.9%	5,243	56.1%	32,873	63.8%
1940-1949	268	8.2%	642	6.9%	3,234	6.3%
1950-1959	241	7.4%	753	8.1%	3,069	6.0%
1960-1969	196	6.0%	487	5.2%	2,519	4.9%
1970-1979	175	5.4%	436	4.7%	2,406	4.7%
1980-1989	281	8.6%	661	7.1%	1,773	3.4%
1990-1999	177	5.4%	507	5.4%	1,941	3.8%
2000-2009	77	2.4%	374	4.0%	2,511	4.9%
2010-2013	53	1.6%	155	1.7%	761	1.5%
2014 or Later	3	0.1%	94	1.0%	476	0.9%
<b>Total Housing Units</b>	<b>3,263</b>	<b>100.0%</b>	<b>9,352</b>	<b>100.0%</b>	<b>51,563</b>	<b>100.0%</b>

Sources: Esri Business Analyst, 2021; BAE, 2022.

## Vacancy Status

Both the Study Area and the Southwest Partnership area have high housing vacancy rates of over 30 percent. Not only was the proportion of vacant units high, but also the number of vacant units actually increased despite a net decline in total housing units. Notably, the increase in vacant units and decline in housing units was more pronounced in the Study Area than in the Southwest Partnership overall.

**Table 9: Vacancy Status**

West Baltimore St. Study Area	2010		2021		Change 2010-2021	
	Number	Percent	Number	Percent	Number	Percent
Occupied units	2,825	72.9%	2,275	66.1%	-550	-19.5%
Vacant units	1,049	27.1%	1,166	33.9%	117	11.2%
<b>Total Units</b>	<b>3,874</b>	<b>100.0%</b>	<b>3,441</b>	<b>100.0%</b>	<b>-433</b>	<b>-11.2%</b>

Southwest Partnership	2010		2021		Change 2010-2021	
	Number	Percent	Number	Percent	Number	Percent
Occupied units	6,787	71.6%	6,613	69.6%	-174	-2.6%
Vacant units	2,687	28.4%	2,894	30.4%	207	7.7%
<b>Total Units</b>	<b>9,474</b>	<b>100.0%</b>	<b>9,507</b>	<b>100.0%</b>	<b>33</b>	<b>0.3%</b>

Sources: Esri Business Analyst, 2021; BAE, 2022.

## Resident Employment by Occupation

The top three occupations for resident employment in the Study Area were Management (10 percent), Sales and Sales Related occupations (10 percent), and Transportation/Material Moving (9 percent). Combined, the top three occupations account for 29.2 percent of the total. Occupations in Computer, Engineering, and Science accounted for 9 percent of employed residents. The top three occupations for employed residents in the Southwest Partnership neighborhoods were Transportation/Material Moving (11 percent), Management (10 percent), and Sales and Sales Related (9 percent). Combined, the top three occupations account for 30 percent of the total. Occupations in Computer, Engineering, and Science accounted for 8 percent of employed residents.

**Table 10: Employed Residents by Occupation**

<b>Occupation</b>	<b>West Baltimore St. Study Area</b>		<b>Southwest Partnership</b>	
	<b>Number</b>	<b>Percent</b>	<b>Number</b>	<b>Percent</b>
Management	252	10.1%	662	9.6%
Business/Financial	124	5.0%	324	4.7%
Computer/Mathematical	74	3.0%	204	3.0%
Architecture/Engineering	9	0.4%	75	1.1%
Life/Physical/Social Science	50	2.0%	111	1.6%
Community/Social Service	91	3.7%	182	2.6%
Legal	83	3.3%	132	1.9%
Education/Training/Library	151	6.1%	409	5.9%
Arts/Design/Entertainment/Sports/Media	36	1.4%	102	1.5%
Healthcare Practitioner/Technician	176	7.1%	562	8.1%
Healthcare Support	220	8.8%	389	5.6%
Protective Service	130	5.2%	215	3.1%
Food Preparation/Serving Related	114	4.6%	485	7.0%
Building/Grounds Cleaning/Maintenance	107	4.3%	426	6.2%
Personal Care/Service	46	1.8%	131	1.9%
Sales and Sales Related	249	10.0%	621	9.0%
Office/Administrative Support	172	6.9%	579	8.4%
Farming/Fishing/Forestry	0	0.0%	0	0.0%
Construction/Extraction	90	3.6%	231	3.3%
Installation/Maintenance/Repair	64	2.6%	156	2.3%
Production	27	1.1%	130	1.9%
Transportation/Material Moving	227	9.1%	789	11.4%
<b>Total Employed Residents (a)</b>	<b>2,492</b>	<b>100.0%</b>	<b>6,915</b>	<b>100.0%</b>

Note:

(a) Totals may not match totals in other tables due to independent rounding.

Sources: Esri Business Analyst, 2021; BAE, 2022.

## Resident Employment by Industry

The top three industries employing Study Area residents were Health Care and Social Assistance, Retail Trade, and Educational Services, which combined account for 51 percent of total resident employment. The top three industries employing residents in the Southwest Partnership were Health Care and Social Assistance, Retail Trade, and Transportation and Warehousing, which combined account for 42.7 percent of total, suggesting a slightly greater diversity of industries in the Southwest Partnership. The industry employing the largest share of residents in both geographies is Health Care and Social Assistance, at 21.7 percent in the Study Area and 19.5 percent in the Southwest Partnership.

**Table 11: Employed Residents by Industry**

Industry	West Baltimore St. Study Area		Southwest Partnership	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing and Hunting	0	0.0%	0	0.0%
Mining	0	0.0%	0	0.0%
Utilities	31	1.2%	34	0.5%
Construction	78	3.1%	265	3.8%
Manufacturing	52	2.1%	229	3.3%
Wholesale Trade	9	0.4%	58	0.8%
Retail Trade	406	16.3%	883	12.8%
Transportation and Warehousing	157	6.3%	719	10.4%
Information	8	0.3%	62	0.9%
Finance and Insurance	26	1.0%	157	2.3%
Real Estate Rental and Leasing	70	2.8%	149	2.2%
Professional, Scientific, and Technical Services	128	5.1%	346	5.0%
Management of Companies and Enterprises	0	0.0%	0	0.0%
Administrative, Support, Waste Mgmt & Remediation	114	4.6%	442	6.4%
Educational Services	325	13.0%	634	9.2%
Health Care and Social Assistance	540	21.7%	1,350	19.5%
Arts, Entertainment, and Recreation	38	1.5%	96	1.4%
Accommodation and Food Services	125	5.0%	555	8.0%
Other Services (except Public Administration)	119	4.8%	384	5.6%
Public Administration	267	10.7%	554	8.0%
<b>Total Employed Residents (a)</b>	<b>2,493</b>	<b>100.0%</b>	<b>6,917</b>	<b>100.0%</b>

Note:

(a) Totals may not match totals in other tables due to independent rounding.

Sources: Esri Business Analyst, 2021; BAE, 2022.

## Employment by Industry

Employment by industry categorizes jobs located within the specified geography, as opposed to categorizing jobs held by residents. In the Study Area, the top four industries were Educational Services, Health Care and Social Assistance, Other Services (excluding Public Administration), and Professional, Scientific, and Technical Services, which combined account for a majority (57.4 percent) of employment. In the Southwest Partnership area, the top four industries were Retail Trade, Public Administration, Health Care and Social Assistance, and Educational Services, which together account for almost half (47.2 percent) of employment in the area. There is a relatively high share of jobs in Professional, Scientific, and Technical Services in the Study Area (9.7 percent) compared to Southwest Partnership area (5.6 percent), which is notable given that it is generally a higher paying industry. That is probably due to the tech job concentration at UM BioPark in the smaller Study Area. There are notable differences in the shares of jobs by industry and resident employment by industry.; For example, Retail Trade employs 16.3 percent of residents, but accounts for just 5.4 percent of jobs in the Study Area.



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**Table 12: Employment by Industry, 2021**

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<b>Industry</b>	<b>West Baltimore St. Study Area</b>		<b>Southwest Partnership</b>	
	<b>Number</b>	<b>Percent</b>	<b>Number</b>	<b>Percent</b>
Manufacturing	41	2.5%	392	6.6%
Retail Trade	88	5.4%	785	13.3%
Accommodation and Food Services	67	4.1%	175	3.0%
Information	43	2.6%	86	1.5%
Professional, Scientific, and Technical Services	159	9.7%	331	5.6%
Health Care and Social Assistance	258	15.8%	692	11.7%
Wholesale Trade	29	1.8%	371	6.3%
Other Services (exc. Public Administration)	205	12.6%	422	7.1%
Construction	129	7.9%	265	4.5%
Educational Services	315	19.3%	601	10.2%
Administrative, Waste & Remediation	109	6.7%	164	2.8%
Real Estate Rental and Leasing	50	3.1%	140	2.4%
Public Administration	0	0.0%	712	12.0%
Finance and Insurance	29	1.8%	134	2.3%
Transportation and Warehousing	19	1.2%	70	1.2%
Arts, Entertainment, and Recreation	50	3.1%	467	7.9%
Management of Companies and Enterprises	0	0.0%	14	0.2%
Utilities	0	0.0%	24	0.4%
Agriculture, Forestry, Fishing and Hunting	0	0.0%	0	0.0%
Mining	0	0.0%	0	0.0%
Unclassified	40	2.5%	64	1.1%
<b>Total Employment</b>	<b>1,631</b>	<b>100.0%</b>	<b>5,909</b>	<b>100.0%</b>

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Sources: Esri Business Analyst, 2021; BAE, 2022.

## Commute Flows

Notably, the vast majority of workers in the Study Area, nearly three-quarters (73 percent), travel from outside of Baltimore City. More than 50 percent of the Study Area workers live in either Baltimore City or Baltimore County. A much larger share of residents in the Study Area work in Baltimore City (44.4%), with approximately two-thirds of residents working in either Baltimore City or Baltimore County.

**Table 13: Commute Flows, 2019**

Workers by Place of Residence			Residents by Place of Work		
Place of Residence	Workers		Place of Work	Employed Residents	
	Number	Percent		Number	Percent
<b>Baltimore City</b>	<b>373</b>	<b>27.3%</b>	<b>Baltimore City</b>	<b>843</b>	<b>44.4%</b>
<b>Baltimore County</b>	<b>363</b>	<b>26.6%</b>	<b>Baltimore County</b>	<b>424</b>	<b>22.3%</b>
Towson	27	2.0%	Towson	63	3.3%
Dundalk	26	1.9%	Catonsville	37	1.9%
Parkville	21	1.5%	Woodlawn	33	1.7%
Randallstown	19	1.4%	Cockeysville	31	1.6%
Owings Mills	18	1.3%	Pikesville	28	1.5%
All Other Baltimore County	104	7.6%	All Other Baltimore County	135	7.1%
<b>Anne Arundel County</b>	<b>148</b>	<b>10.9%</b>	<b>Anne Arundel County</b>	<b>224</b>	<b>11.8%</b>
<b>Howard County</b>	<b>122</b>	<b>8.9%</b>	<b>Howard County</b>	<b>126</b>	<b>6.6%</b>
<b>Prince George's County</b>	<b>67</b>	<b>4.9%</b>	<b>Montgomery County</b>	<b>73</b>	<b>3.8%</b>
<b>All Other Counties</b>	<b>291</b>	<b>21.3%</b>	<b>All Other Counties</b>	<b>209</b>	<b>11.0%</b>
<b>Total Workers</b>	<b>1,364</b>	<b>100.0%</b>	<b>Total Residents</b>	<b>1,899</b>	<b>100.0%</b>

Sources: Longitudinal Employer-Household Dynamics via OnTheMap, 2019; BAE, 2022.

## Retail Market Summary

Table 14 provides a retail market summary for three areas per CoStar, a private real estate market data vendor. While the CoStar data does not provide a true picture of the retail real estate market in the area, as it only includes properties that have listed by commercial brokers, it does provide some comparison data for the bigger picture. According to CoStar, a slight majority (52 percent) of the Southwest Partnership area's retail market inventory that has been commercially listed is located within the Study Area, suggesting that the area is a major retail node for the Southwest Partnership area. Due to the lack of commercial listings, rental data is likely unreliable and certainly underreported. In the Trade Area, rents may be more representative of what the retail market in the Study Area may command at the higher end. This would only pertain to newly constructed retail space with top line amenities. Net absorption, which measures lease move-ins minus lease move-outs, is negative across all three geographies, indicating increasing vacancies, which is certainly the case. It is notable that CoStar reports no new deliveries in the Study Area, which has the bulk of the reported retail inventory in the Southwest Partnership area.

According to the Southwest Partnership current rental rates on West Baltimore Street, which makes up a large portion of the Study Area, range between \$10 and \$15 per square foot on average. This information was provided to Southwest Partnership by property owners on the street. Retail vacancy on the West Baltimore Street part of the Study Area has worsened as a result of Covid. It has been reported that several businesses operating early in 2020 on West Baltimore Street closed in 2020 or 2021 due to losses suffered during the worst part of the Covid pandemic. It appears that few of the spaces these businesses occupied have since been filled.

**Table 14: Retail Market Summary (Commercially Listed), 2010-2021**

<b>Retail Market Summary, Q4 2021</b>	<b>West Baltimore St. Study Area</b>	<b>Southwest Partnership</b>	<b>West Baltimore St. Trade Area</b>
<b>Inventory (sf), Q4 2021</b>	654,438	1,253,580	4,491,657
Inventory (% of City)	14.6%	27.9%	100.0%
<b>Avg. Asking NNN Rents (psf)</b>			
Avg. Asking Rent (psf), Q4 2020	\$10.20	n.a.	\$15.24
Avg. Asking Rent (psf), Q4 2021	n.a.	n.a.	\$20.16
% Change Q4 2020 - Q4 2021	n.a.	n.a.	32.3%
<b>Net Absorption Direct (sf)</b>			
Net Absorption (sf), Q1 2010-Q4 2021	-45,297	-23,297	-154,006
Net Absorption (sf), Q1 - Q4 2021	-15,299	6,870	-56,107
<b>New Deliveries (sf), Q1 2010 - Q4 2021</b>	0	26,200	152,977
New Deliveries (% of City)	0.0%	17.1%	100.0%
<b>Under Construction (sf), Q4 2021</b>	0	0	0
Under Construction (% of City)	n.a.	n.a.	n.a.

Sources: CoStar, 2022; BAE, 2022.

## Office Market Summary

Table 15 provides an office market summary for three areas per CoStar, a private real estate market data vendor. As with the retail market summary above, the CoStar data does not provide a true picture of the real estate market in the area, as it only includes properties that have been listed by commercial brokers. It does provide some comparison data for the bigger picture. Similar to the retail market, per CoStar, a majority (61 percent) of office space in the Southwest Partnership is located within the Study Area. The office vacancy rate of 0.7 percent is very low compared to the 15.6 percent vacancy rate in the Southwest Partnership and the 13.1 percent vacancy rate in the Trade Area, although the data should not be considered highly reliable as some vacant units are not available for lease and therefore not captured by CoStar's analytics. Net absorption has increased in the Study Area and Southwest Partnership geographies, unlike the retail space, although there is no new office development under construction as of Q4 2021.

**Table 15: Office Market Summary (Commercially Listed), 2010-2021**

Office Market Summary, Q4 2021	West Baltimore St. Study Area	Southwest Partnership	West Baltimore St. Trade Area
<b>Inventory (sf), Q4 2021</b>	826,066	1,353,642	6,954,081
Inventory (% of City)	11.9%	19.5%	100.0%
<b>Net Absorption Direct (sf)</b>			
Net Absorption Direct (sf), Q1 2010-Q4 2021	262,605	267,949	759,060
Net Absorption Direct (sf), Q1 - Q4 2021	19,071	20,496	-11,710
<b>New Deliveries (sf), Q1 2010 - Q4 2021</b>	230,957	230,957	808,105
New Deliveries (% of City)	28.6%	28.6%	100.0%
<b>Under Construction (sf), Q4 2021</b>	0	0	0
Under Construction (% of City)	n.a.	n.a.	n.a.

Sources: CoStar, 2022; BAE, 2022

Southwest Partnership reports that rents in Southwest Baltimore range from about \$14 per square foot up to \$32 per square foot. The higher number is likely a triple net lease rate, inclusive of all expenses (i.e., taxes, common area maintenance, etc.). The lower rate is more typical for standard office space in this market.

## Leakage Analysis

As part of the existing conditions analysis, BAE conducted a leakage analysis using data obtained from Claritas, a private data vendor specializing in consumer data. Claritas provides reports on resident spending occurring in businesses for customized geographies. Comparing resident retail spending (i.e., demand) to spending in retail businesses (i.e., supply) can reveal for which retail categories there is injection or leakage. An injection of spending for a given retail category in a given geography is when spending at businesses exceeds the amount residents are spending in that category, implying the area is a destination for retail in the given category. Inversely, a leakage of spending is when resident spending in a given geography in a given retail category exceeds spending in businesses, implying that the businesses in a given retail category are not capturing the full amount spending residents are generating, meaning residents are leaving the area to purchase goods.

Given data limitations stemming from the relatively small size of the Study Area, Southwest Partnership, and Trade Area when accounting for margins of error in the data, the data was unreliable and there no meaningful conclusions to draw from the leakage analysis comparing supply and demand. Although Claritas allows for the use of customized geographies, it does not necessarily provide data that is cleanly calibrated to that geography. In this instance, there is spending in retail categories that did not exist in the given geographies. For example, there is no grocery store in the Study Area, although the analysis showed a high level of spending at

grocery stores for the Study Area. However, it was the supply data in particular that was unreliable whereas demand numbers (i.e., the amount residents were spending on retail) was reliable enough to describe in this report.

Table 16 summarizes the demand data for all three geographies. The data is shown on a per capita basis, meaning total retail spending by residents is divided by the number of residents in each geography. The data shows that spending in the Motor Vehicles and Parts Dealers category is the highest among all retail categories, although this is not the kind of category that represents a gap in the market for the Study Area. The data does show relatively high levels of spending in the Food and Beverage Stores and Food Services and Drinking Places categories, with the slight differences among the geographies reflecting the differences in household income and, therefore, spending power, in each geography. To some extent, the higher level of per capita resident spending in the Trade Area suggests that capturing some of this demand in the Study Area could help to boost sales in the Study Area. Finally, the spending in the General Merchandise Stores category is notable. The General Merchandise Category includes spending at department stores and variety stores, including businesses like Wal-Mart as well as discount stores or dollar stores. Although large businesses in this category may not be feasible to add to the retail profile of the Study Area, it suggests a lack of smaller businesses that sell components of general merchandise like clothing and apparel, home furnishings, and general household supplies.

**Table 16: Summary of Demand Per Capita (i.e., retail spending by residents)**

<b>Per Capita Spending by Category</b>	<b>Study Area</b>	<b>Southwest Partnership</b>	<b>Trade Area</b>
Motor Vehicle and Parts Dealers	\$3,201	\$3,347	\$4,008
Furniture and Home Furnishing Stores	\$207	\$217	\$280
Electronics and Appliances Stores	\$164	\$171	\$203
Bldg. Materials, Garden Equip. and Supply Stores	\$896	\$932	\$1,170
Food and Beverage Stores	\$1,920	\$1,985	\$2,254
Health and Personal Care Stores	\$804	\$831	\$971
Gasoline Stations	\$1,139	\$1,169	\$1,284
Clothing and Clothing Accessory Stores	\$442	\$464	\$558
Sporting Goods, Hobby, Book, and Music Stores	\$151	\$160	\$193
General Merchandise Stores	\$1,648	\$1,709	\$1,964
Miscellaneous Store Retailers	\$277	\$286	\$339
Food Services and Drinking Places	\$1,457	\$1,525	\$1,892
<b>Total</b>	<b>\$12,308</b>	<b>\$12,798</b>	<b>\$15,117</b>

Source: Claritas, 2022; BAE, 2022.

## Key Findings of Demographic Profile, Real Estate Market and Leakage Analyses

Below are key findings of each part of the core components of the market study: demographic profile, real estate market analysis, and leakage analysis

## Demographics

- There has been a population decline in the Study Area, the Southwest Partnership area and the West Baltimore Street Trade Area ranging from 1.2 percent in the Study Area to 3.2 percent in the Trade Area over the period from 2010 to 2021. This translates to a smaller local market base over the years.
- There has been an increase in the percentage of owner-occupied units versus renter-occupied units in all three geographic area. Typically, this means increased stability among residents.
- The 2021 median household income is low in both the Study Area (\$28,294) and the Southwest Partnership area (\$30,285) versus Baltimore City as a whole, where it was \$52,164 according to the 2020 Census.
- Despite the low median household income areas, more than 15 percent of the Study Area and Southwest Partnership had household incomes over \$100,000 which does represent demand capture potential from these households with disposable income.
- Housing units in each geographic area are older; very few units have been built since 2010.
- The Study Area and the Southwest Partnership area have high housing vacancy rates in 2021: 33.9 percent of Study Area housing units are vacant and 30.4 percent of Southwest Partnership area units are vacant.

## Retail Market Analysis

- Since CoStar only tallies information for properties listed by real estate companies, the real estate data are limited for all three geographies.
- The average asking rent for retail space according to CoStar is somewhat in-line with what we received from property owners and developers but should be considered the rate for new space at the top of the market. In Q42020 retail rents were \$15.24 per square foot; it was \$20.16 per square foot by Q42021, up 32.3 percent.
- According to information received from a West Baltimore Street property owner, actual rental rates for good quality retail space on the street are \$10 to \$15 per square foot.
- The majority of office space in the area is located in the Study Area, likely that is the BioPark space.
- Net absorption of office space has increased in the Study Area and the Southwest Partnership area in 2021, but declined in the broader Trade Area.
- CoStar offered no office rental rate information for the three geographies but a local source reports that office rents in Southwest Baltimore range from \$14 per square foot up to \$32 per square foot. The latter rent is triple net, inclusive of expenses.

## Leakage Analysis

- Given data limitations of the relatively small sized Study Area, the Southwest Partnership area and Trade Area, the supply data was insufficient to draw any conclusions in the leakage analysis.

- On the demand side it does appear that there are relatively high levels of spending in the Trade Area for Food and Beverage Stores, Food Services, and Drinking Places categories.
- There is also a high level of demand in the General Merchandise category, which included businesses like Wal-Mart as well as discount stores and dollar stores. Though it is not feasible to add a large store in the Study Area, it does suggest demand for the components of general merchandise like clothing and apparel, home furnishings, and general household supplies in smaller stores.

## COMMUNITY FEEDBACK

A key component of this study was community outreach. Through an online survey as well as interviews and focus groups with major stakeholders, this analysis includes a significant amount of community feedback. The survey provided in English and Spanish, provides quantified results from 160 respondents, including area residents and patrons of study area businesses. The study also includes several one-on-one or small group interviews with stakeholders including business owners and major institutions, known as anchors, in the neighborhood. Finally, the study conducted two focus group sessions, one with residents, and the other with businesses and property owners. This section of the report provides a summary of the feedback from the community.

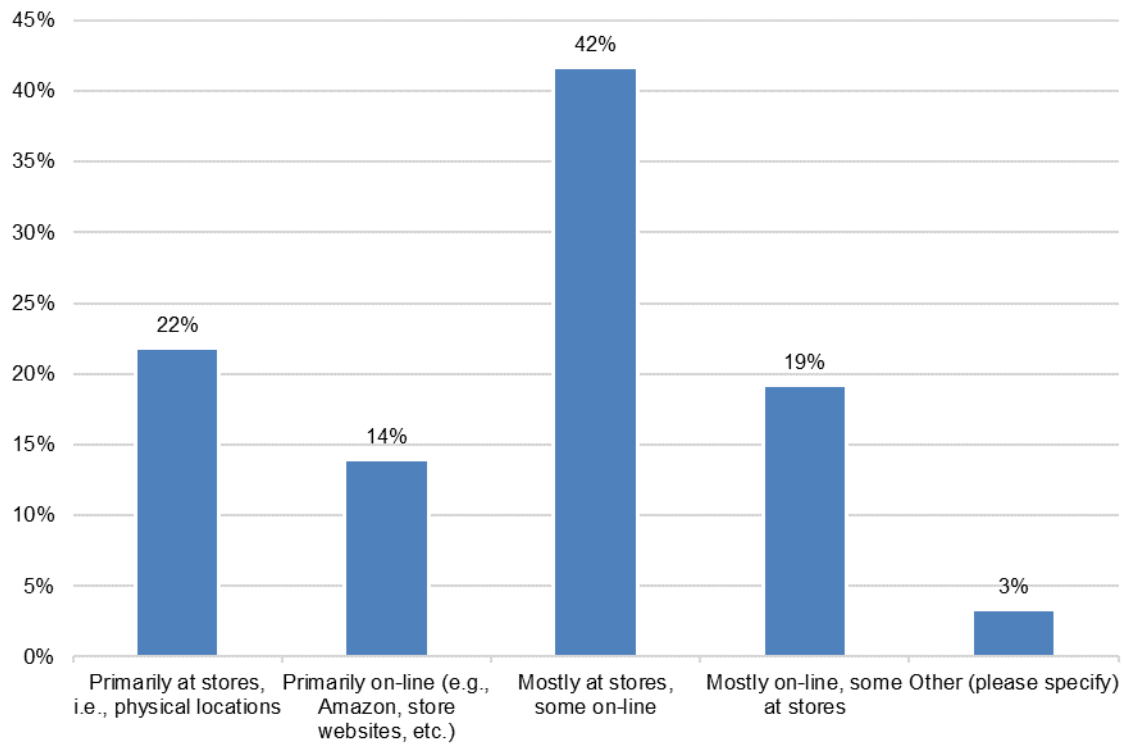
### Summary of Survey Responses

BAE Urban Economics developed a survey in consultation with the Southwest Partnership. The English version of the survey debuted at the SoWeBo Festival on May 29, 2022, and closed June 24, 2022. The Spanish version of the study, which launched on June 9, 2022 and ended on August 7, yielded just nine responses. Both versions of the survey were available online at SurveyMonkey.com and distributed using a weblink and QR code. The survey included 12 questions and took approximately five minutes to complete. In total, there were 151 responses to the English version survey, which are reviewed and analyzed immediately below. This section of the report summarizes the responses to each question.

#### Question 1: How do you typically shop?

The first question of the survey asked respondents to state how they typically shop. Respondents could only select one answer. The most popular response was 'Mostly at stores, some on-line,' accounting for 42 percent of respondents. Overall, 64 percent of respondents indicated they either primarily or mostly shop in-store. This result suggests there is demand for brick-and-mortar despite the growth and popularity of online shopping.

**Figure 2: Q1. How do you typically shop?**



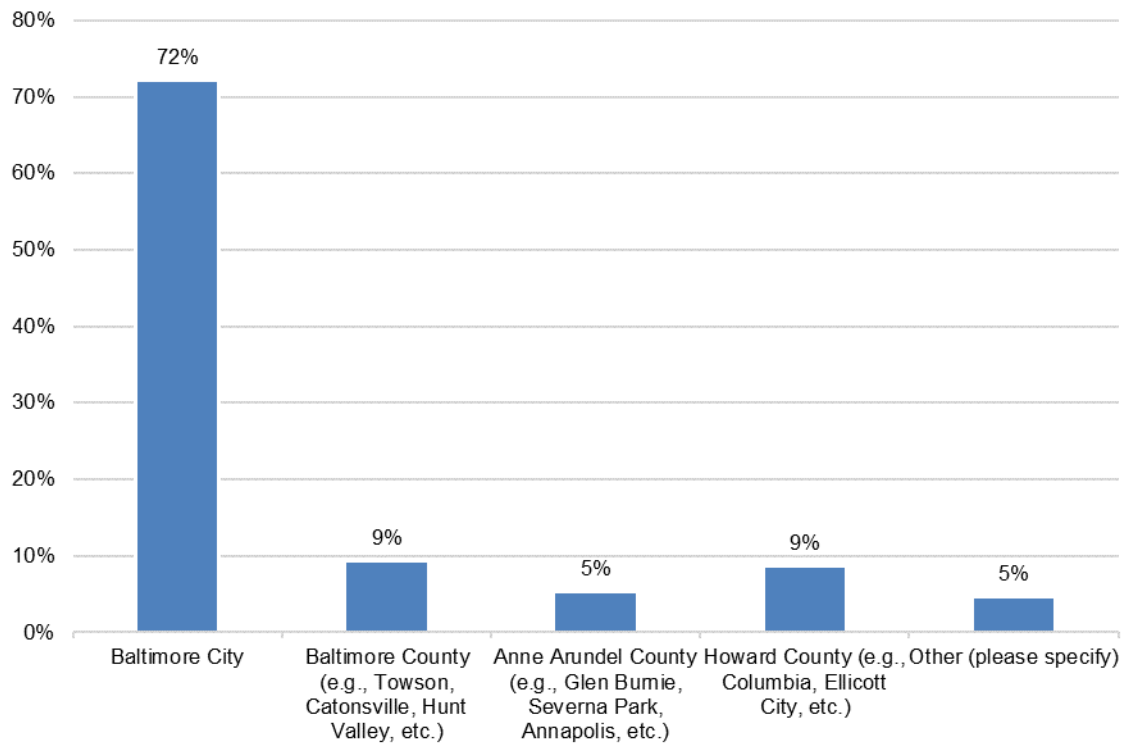
Source: BAE, 2022.

**Question 2: Where do you most frequently shop and eat out?**

The second question asked respondents to indicate where they primarily eat out and shop. As shown in Figure 3, respondents overwhelmingly selected Baltimore City. Baltimore and Howard Counties tied for the second most common response, accounting for nine percent of responses each. This result may reflect that the majority of respondents live in the city, but it does also indicate that the city can meet the demand for shopping and eating out for 72 percent of respondents.



**Figure 3: Q2. Where do you most frequently shop and eat out?**



Source: BAE, 2022.

**Question 3: If you regularly (3x/month or more) shop or go to restaurants/cafes/pubs/bars in Baltimore City, where?**

The third question asked respondents to rank parts of the city that they most frequently patronize for shopping and eating out. Survey Monkey assigned a weighted score to each of the listed neighborhoods based on their rank. Figure 4 shows the total score for each neighborhood, revealing that Federal Hill/Locust Point was the most popular retail destination for survey respondents, with a score of 8.35 out of ten. Pigtown had the second highest score at 8.01, although it was almost equivalent to the West Baltimore Street/Hollins Market score of 7.97. The gap between the top three choices was closer (0.37) than the gap between the third ranked destination and the fourth destination (Downtown), which had a score of 7.07.

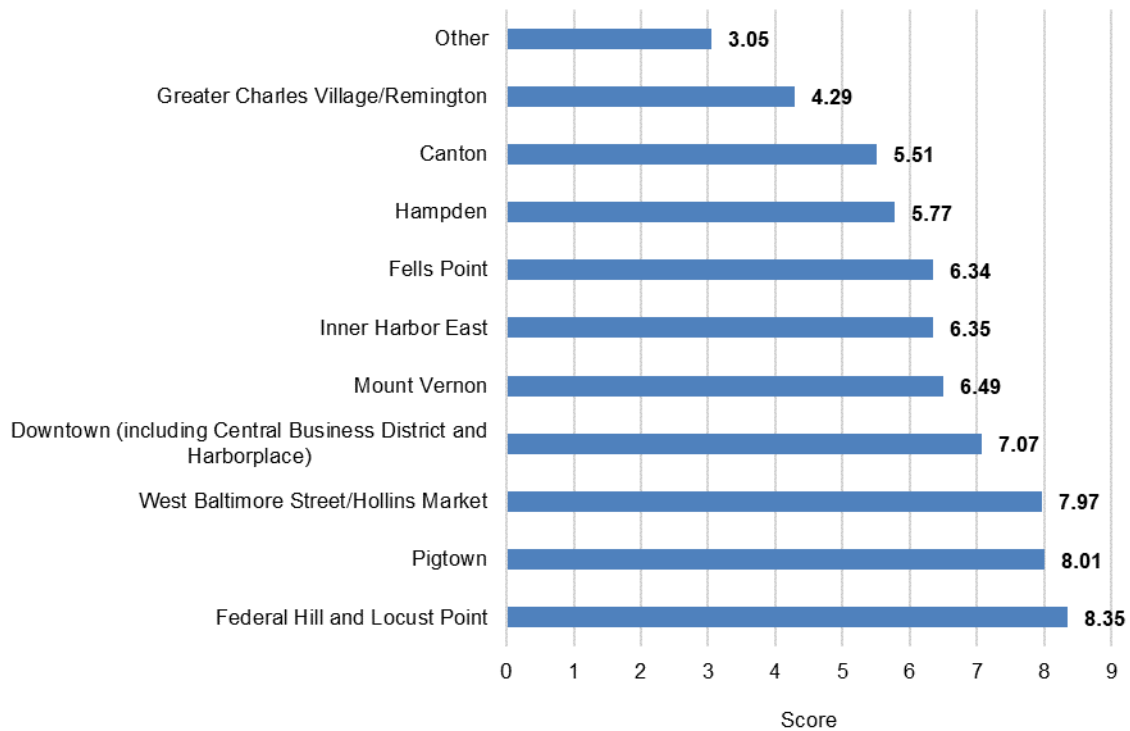
Figure 5 analyzes the responses for the top three ranked neighborhoods. Although West Baltimore Street/Hollins Market had the lowest score of the top three neighborhoods, it was the most popular first choice among respondents, with 31 percent of respondents ranking it first, compared to 19 percent ranking Federal Hill/Locust Point first, and 14 percent ranking Pigtown first. Federal Hill/Locust point also was not the most common second-ranked choice among respondents, with 30 percent of respondents ranking Pigtown second, compared to 14 percent ranking West Baltimore Street/Hollins Market second, and 19 percent ranking Federal

Hill/Locust Point second. The data suggests that even if it is not the respondents first choice destination for retail among respondents, Federal Hill/Locust Point was a popular destination for most respondents. That West Baltimore Street/Hollins Market was the most common first choice option likely reflects the fact that most respondents are residents of the area. This may also explain why nearby Pigtown the most common second-ranked response. These findings indicate West Baltimore Street/Hollins Market clearly has an appeal as destination, but is likely leaking sales to Pigtown and Federal Hill/Locust Point, which may offer retail options that do not currently exist in the West Baltimore Street/Hollins Market area.

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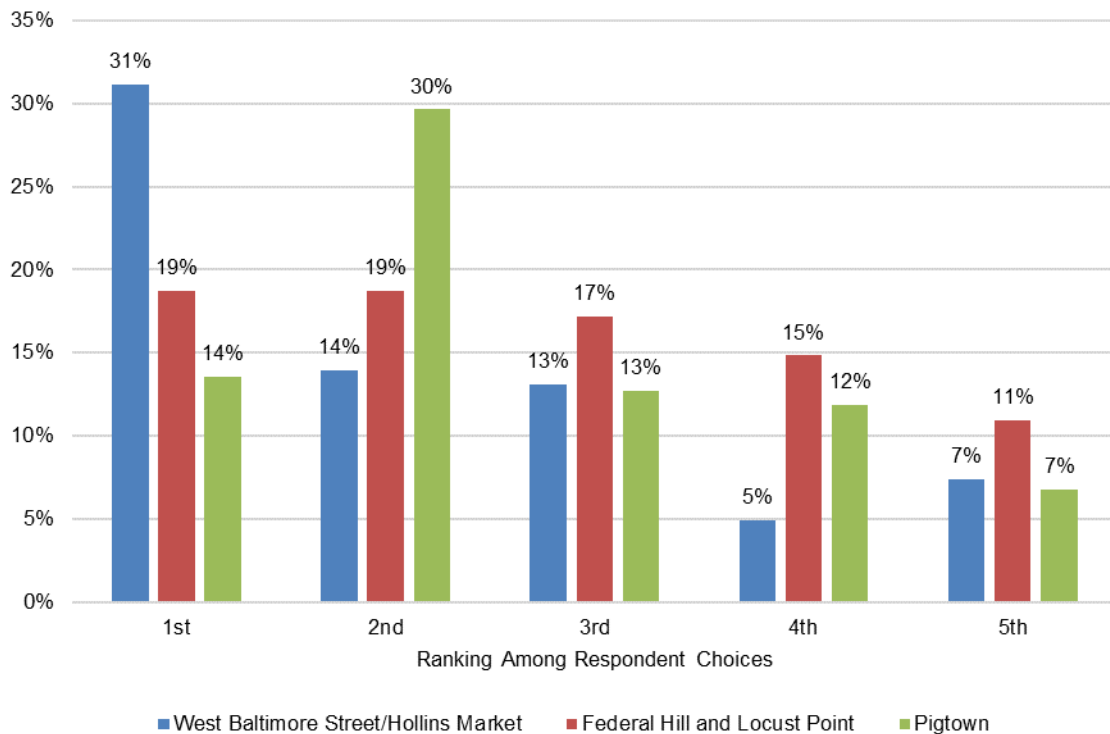
**Figure 4: Q3. If you regularly (3x/month or more) shop or go to restaurants/cafes/pubs/bars in Baltimore City, where? (Ranked options)**

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Source: BAE, 2022.

**Figure 5: Analysis of Top-Ranked Responses to Question 3**



Source: BAE, 2022.

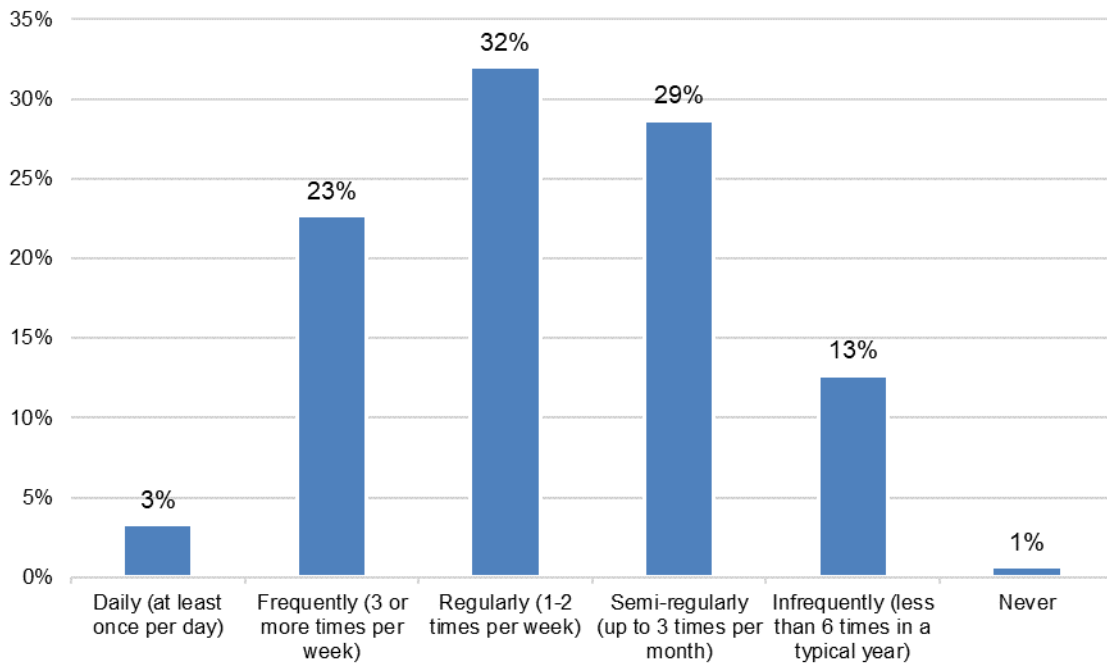
**Question 4: How often do you eat/drink at a restaurant, café, or pub/bar, including all mealtimes?**

As summarized in Figure 6, over half of the survey respondents indicated that they eat out, get coffee, or have a drink at a bar frequently (three or more times per week) or regularly (one to two times per week). This question is regarding eating out only and does not include carry-out. Approximately 83 percent of respondents eat out semi-regularly (up to three times per month) to frequently. Just three percent of respondents indicated that they eat out on a daily basis, which may reflect the high cost of doing so. Nonetheless, these results suggest that there is strong demand among respondents for options to go out for meals, drinks, or coffee.

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**Figure 6: Q4. How often do you eat/drink at a restaurant, café, or pub/bar, including all mealtimes?**

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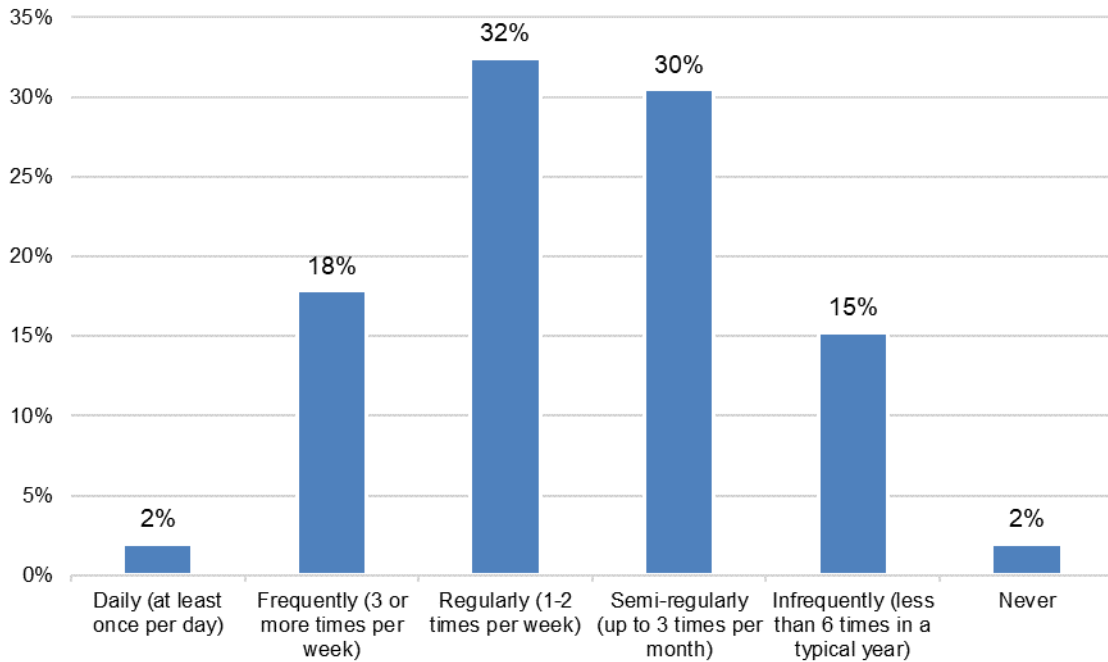
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Source: BAE, 2022.

**Question 5: How often do you get carry-out from restaurant, café, or pub/bar?**

Questions 5 asks respondents how often they carry-out food, coffee, or drinks. Responses to this question, as shown in Figure 7, mirrored responses to question 4 regarding how often respondents eat out. A comparable but slightly smaller share of respondents (81 percent) indicated they get carry-out frequently to semi-regularly. A smaller share of respondents indicated they get carry-out frequently than go out to eat frequently, at 18 percent compared to 23 percent. Correspondingly, a larger share of respondents indicated they get carry-out semi-regularly.

**Figure 7: Q5. How often do you get carry-out from a restaurant, café, or pub/bar?**



Source: BAE, 2022.

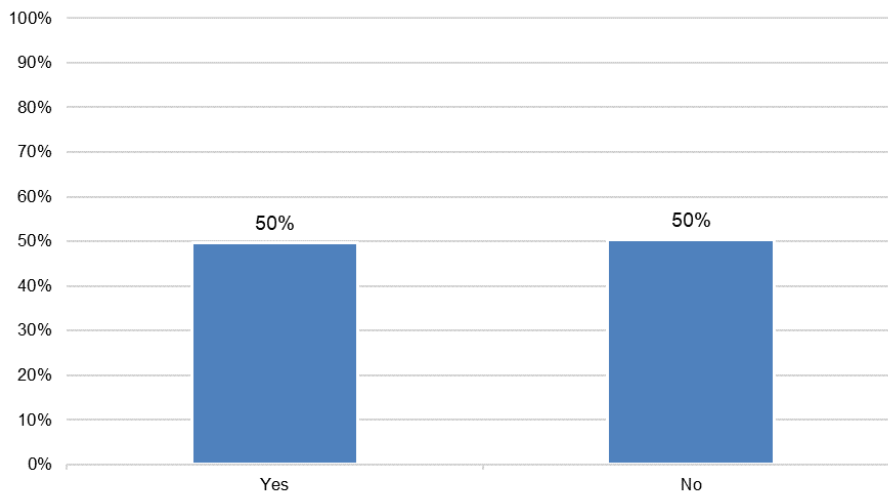
**Question 6: Do you currently shop on West Baltimore Street or in Hollins Market and immediate surrounding area?**

Question 6 is a yes or no question asking respondents whether or not they shop on West Baltimore Street/Hollins Market. Just 50 percent of respondents answered yes. By comparison, 31 percent of respondents ranked West Baltimore Street/Hollins Market as their top-ranked retail destination. This suggests that for the respondents that do shop on West Baltimore Street/Hollins Market, it is not their top destination for retail. This potentially points to weaknesses in the availability and diversity of retail options on West Baltimore Street that new retail options may help to improve.

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**Figure 8: Q6. Do you currently shop on West Baltimore Street or in Hollins Market and immediate surrounding area?**

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Source: BAE, 2022.

**Question 7: If you answered yes to question 6, which shops and how frequently per week or month?**

Question 7 is a follow up to question 6, asking respondents who answered yes to mention which businesses they patronize. As a result, only half of the respondents to the survey answered this question. The responses to this question are difficult to quantify as answers were typed, and there some differences in spelling for the same business. However, a review of written responses suggests the following businesses were among the most commonly mentioned by respondents:

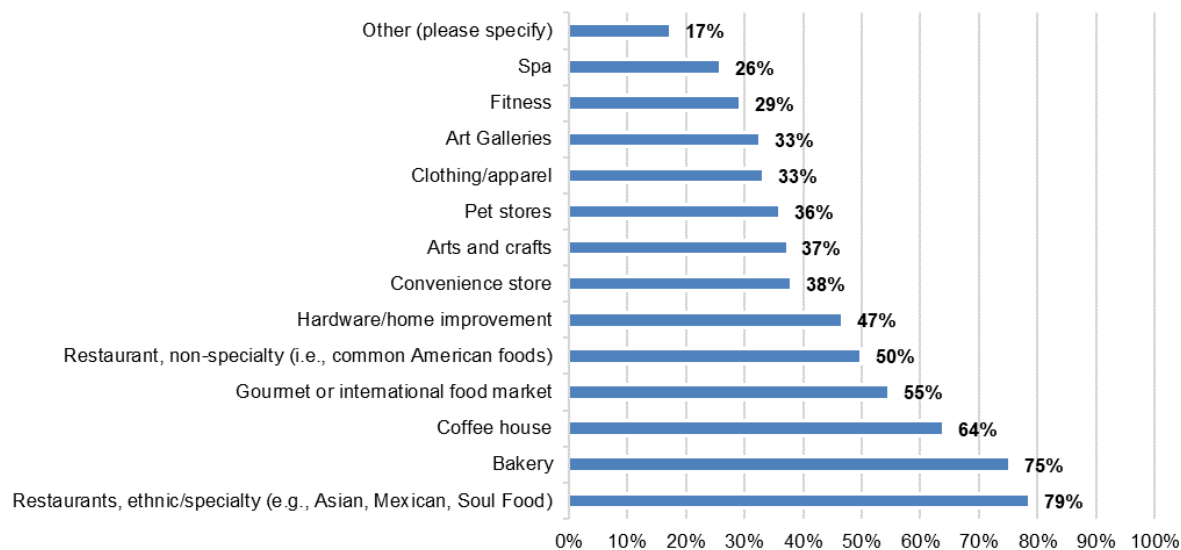
- Charm City Books
- Juice Lab
- Zella's
- Hollins Market
- Primo Chicken
- Silver Moon
- Mulberry

Respondents were also asked to describe how often they visit these businesses, although not all responses included this detail. However, a review of all responses suggests that the most common frequency mentioned was once or twice a month.

**Question 8: What types of businesses would you likely support if they were located on West Baltimore Street or in and around Hollins Market? (You may select more than one)**

Question 8 provides a list of types of businesses for respondents to indicate which they would patronize if they were on West Baltimore Street or the Hollins Market area. Respondents could select more than one response. As shown in Figure 9, over half of respondents indicated they would support ethnic or specialty restaurants, a bakery, cafes, gourmet OR international food markets, and non-specialty restaurants (i.e., American fare). The most popular response was specialty/ethnic restaurants, which 79 percent of respondents indicated they would support. Hardware and home improvement was also a popular response, with 47 percent of respondents indicating they would support such a business. In addition, 17 percent of respondents indicated they would support some ‘other’ type of business. The ‘Other’ category was the least common response. The most common written responses to the ‘Other’ option included ice cream parlors and dry cleaners.

**Figure 9: Q8. What types of businesses would you likely support if they were located on West Baltimore Street or in and around Hollins Market? (You may select more than one)**



Source: BAE, 2022.

**Question 9: How do you usually travel to shop?**

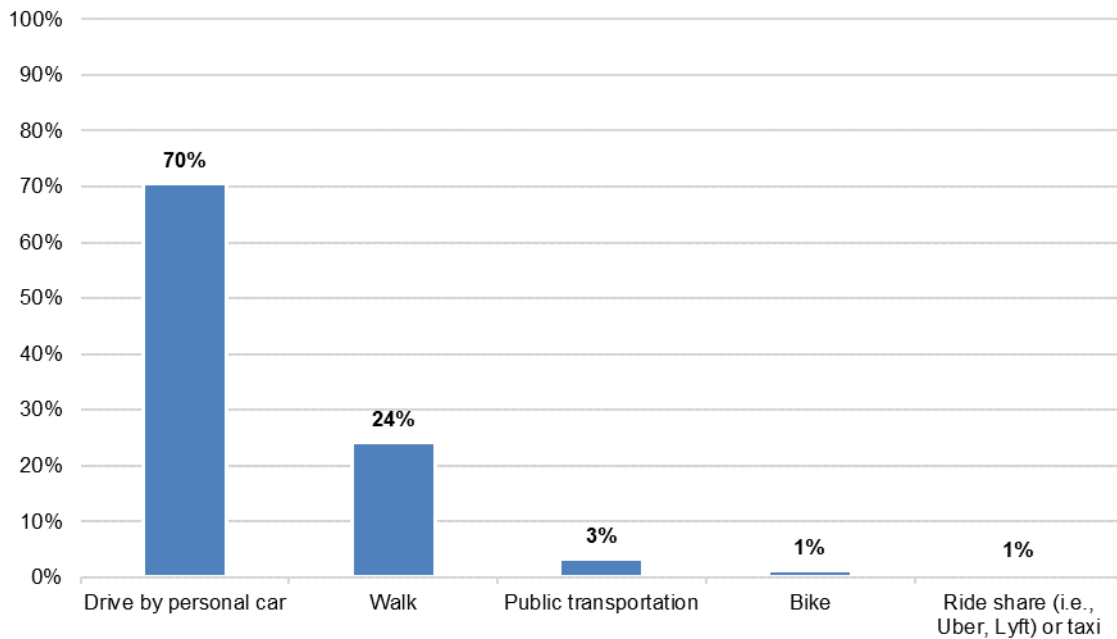
In response to question 9 regarding travel mode for shopping, respondents overwhelmingly selected ‘driving by personal car’ (70 percent of respondents). An additional 24 percent indicated they walk to shop. Just three percent take public transportation, while just one percent bike. In a dense urban environment like West Baltimore Street, this is less likely to be

an indication of walkability an indication that respondents do not necessarily live where they shop.

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**Figure 10: Q9. How do you usually travel to shop?**

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Source: BAE, 2022.

**Question 10: What impediments/constraints limit your inclination to patronize or support businesses on West Baltimore Street or in the Hollins Market area?**

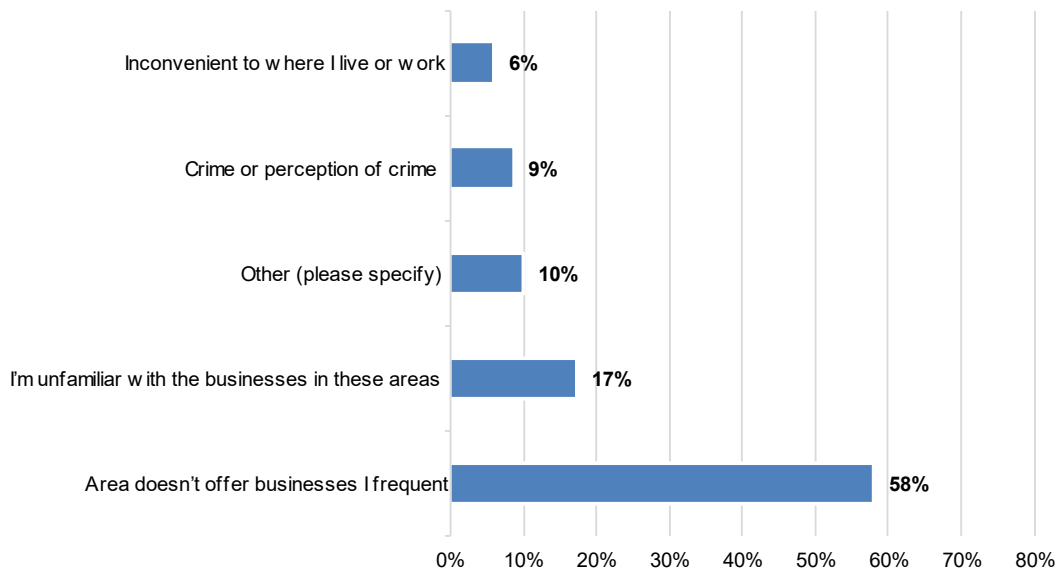
Respondents were also asked what impediments limit their inclination to patronize West Baltimore Street/Hollins Market, as summarized in Figure 11. The majority of responses answered that the area does not have the businesses they frequent, while the second most common response was the perception that the area does not provide the businesses they frequent. The next most frequent response on a single issue regarding impediments or constraints for the retail area was crime or perception of crime at nine percent. Notably, just six percent responded that the area is inconvenient to where they live or work, which suggests there is latent or unmet demand for retail in the area.



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**Figure 11: Q10. What impediments/constraints limit your inclination to patronize or support businesses on West Baltimore Street or in the Hollins Market area?**

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Source: BAE, 2022.

**Question 11: What is the zip code where you live?**

Question 11 asks where the respondents live. Approximately 52 percent of respondents live in zip code 21223, which includes the West Baltimore Street Study Area. The second most common response, accounting for 11 percent of respondents, was the 21230 zip code spanning Pigtown, Federal Hill, and Locust Point. The third most common zip code, accounting for seven percent of respondents, was 21201, which is immediately east of 21223 zip code. It includes Lexington Terrace, Lexington Market, the University of Maryland Medical Center, and parts of downtown west of Charles Street. The remaining 30 percent of respondents were split across 24 zip codes, all but one of which were in the Baltimore Metropolitan Area. These findings underscore some of the skew of the results presented in this analysis. Results reflect the fact that the majority of respondents live in or near West Baltimore Street/Hollins Market.

**Question 12: If you are employed, where do you work? List the zip code or location by jurisdiction or neighborhood/area (e.g., Downtown Baltimore, Towson, Howard County, etc.).**

Question 12 asks respondents to provide the zip code or location they work in. As the data are not all quantitative, and because responses wrote in their answers, it is difficult to make quantitative conclusions about the responses. However, as shown in the word cloud in Figure 12, the most common zip codes listed were 21223 (which includes the study area), 21201 and 21202 (which together span Downtown Baltimore), and 21230 (which includes Pigtown to

Locust Point). Other written responses included Downtown Baltimore and “D.C..” As the word cloud shows, the most common responses were 21223 and 21201.

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**Figure 12: Q12. If you are employed, where do you work? (Word Cloud)**

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Source: BAE, 2022.

## Spanish Survey Results

There were only nine responses to the Spanish version of the survey, making it difficult to draw many conclusions from it. However, there are few interesting findings from the limited survey, especially when compared to the English version. These are:

- Five of the nine (about 56 percent) Spanish survey respondents shop primarily at stores. This compares to only 22 percent of the English survey respondents.
- Spanish survey respondents said they typically frequent restaurants/cafes/pubs/bars in these areas: 1) West Baltimore Street/Hollins Market, 2) Pigtown, 3) Federal Hill and Locust Point.
- Five of the nine Spanish survey respondents said they eat/drink at a restaurant/café/pub/bar including all mealtimes at least once a day.
- When asked what types of businesses Spanish speaking respondents would likely support on West Baltimore Street or Hollins Market eight out of nine said bakery, six out of nine said coffee house, and five out of nine said restaurants, ethnic/specialty (e.g., Asian, Mexican, Soul Food).
- When asked what impediments/constraints limit Spanish speaking respondents' inclination to patronize or support businesses in the Study Area, the number one response was crime, perception of crime. In the English version, the number one response was 'area doesn't offer businesses I frequent.'

## Focus Groups and Interviews

A key component of this retail study is detailed discussions in one-on-one interviews, small group interviews and focus groups. The participants in the interviews and focus groups included residents, business owners, property owners, and representatives from anchor institutions in the community. The process included two focus group sessions, one for business and property owners, and one for residents. Though these focus groups were originally designed to be held in person with a virtual option, Southwest Partnership opted to have the focus group sessions be 100 percent virtual due to the ongoing surges of Covid

variants. Much of the feedback received at the interviews and focus groups is in line with the survey results in terms of retail potential and is also consistent with the existing conditions analysis in terms of describing existing retail demand.

In order to be comprehensive, yet succinct in summarizing the input from the focus groups and interviews, the feedback is organized below by broad topics, consistent with what was covered in the survey that is described above. This input along with the survey results is analyzed in the last section of the market analysis.

### **Customer Base**

Most of the businesses interviewed for this study indicate that the largest percentages of their customers live in Southwest Baltimore and primarily in the Southwest Partnership neighborhoods including the Study Area, but also Union Square, Mt. Clare, Poppleton and Pigtown. Zella's may have the broadest local customer range as they deliver as far away as Federal Hill, about a two-mile radius.

Some, especially the restaurants, indicate that they have customers from the broader region which would include other parts of the City and parts of Baltimore County, primarily on the west side of town. These interviewees know that many of these customers work in Southwest Baltimore. Notably, one of the restaurants, England Eatery indicated that most of their customers come from the larger region and few from the immediate area.

A few of the businesses, most notably the Hollins Market vendors, indicated that the number of customers they have has been declining in recent years, even before the Covid-19 pandemic. These businesses report that their customer base has a lot of senior population, which by definition is declining. Others, including Lisa's Tag and Title report an overall decline and a shift in the make-up of customers geographically, with more coming from the broader region than locally.

Some of the restaurants noted that they had been getting business from the UM BioPark and former Bon Secours hospital, including large orders and catering for meetings, but that dropped off to almost nothing in the last two years with so many people working from home and few large business meetings being held. They are hopeful that business will start to come back when Covid-19 is more under control.

### **What businesses are/would be supported in the Study Area?**

Study Area merchants reported that area residents seem to patronize convenience/food stores, restaurants, including carry-outs, and personal services businesses like barber shops and beauty salons. There was some discussion among interviewees, notably Hollins Market vendors, that historically convenience stores that sold tobacco and lottery tickets were located in the market, and were popular and drove foot traffic to other businesses. Though the vendors know that the City limits selling tobacco and lottery tickets within their public markets,

they nonetheless expressed the wish that these products were still available to attract customers to Hollins Market.

Employees of the Study Area businesses also comprise a portion of the demand base for retail. These major employers include the Grace Medical Center, which is part of the LifeBridge Health system, and the UM BioPark. Interviewees from these anchor institutions reported that though most of their employees live outside the Study Area, they would patronize local businesses if there was a greater variety of businesses that met their needs. Such businesses include more restaurants and carry-outs, but at a higher end featuring more healthy options. Interviewees and participants highlighted bars for happy hour and cafes that feature high quality coffee, as in demand from workers, suggesting there is also a need for gathering spaces.

Representatives of anchor institutions and community organizations with a presence in the neighborhood observed that residents and their employees would potentially support higher quality grocery stores as opposed to the PriceRite at Mount Clare Junction or the bodega type markets on West Baltimore Street. Some of these could be international or specialty markets, also identified in the survey responses, which they believed could have support from local residents and employees.

### **Constraints and Impediments**

Virtually all of the interviewees and participants noted that the Study Area suffers from a reputation of being unsafe, though some felt the crime issue may be more perception than reality. Several reflected that concerns about crime are discouraging customers who used to patronize local businesses, or would do so if they felt safer. Interviewees noted that safety issues may be a particular concern for seniors in the area. Several also noted that the crime concern is much broader in Baltimore than just this area, but that does not make it less of an impediment to attracting customers.

Several interviewees mentioned trash and sanitation as an issue that may be impeding customers. Only a few knew about the Southwest Partnership's Clean and Green initiative sponsored by LifeBridge and UM BioPark, but most have not noticed substantial improvements in the area. They suggested that more information about the service be shared with local businesses, along with a way to report where cleaning and sanitation is acutely needed.

Another impediment is that there is no strong destination use that would attract customers on its own to the Study Area, either on West Baltimore Street or in the Hollins Market Area. Often, this type of use is focused on entertainment of some type. The rehabilitation of the old Lord Baltimore Theater into a community arts center focused on dance, which Southwest Partnership is planning for the longer-term, could potentially create a draw large enough to have a positive impact on surrounding businesses. Likewise, the Hollins Market Head House

reactivation could be a draw for the Hollins Market area, though at this writing that future use is still unknown.

### **Community Amenities**

Representatives of the anchor employers also mentioned a need for more amenities like childcare services, more green space, and a dog park. Although cited as in demand by large employers of workers that do not necessarily live in the Study Area, these amenities were also mentioned by area residents in the surveys and/or focus groups, and these may be particularly in demand from the younger residents of the area.

### **Other Issues**

A few interviewees, largely from the anchor institutions, expressed concern about gentrification. These interviewees noted that while making the community appealing for workers and capturing sales from workers is critical to the economy of the Study Area, catering to those needs alone may bias the retail landscape to their needs and ignore some of the demand from existing residents which may lead to displacement pressures in the medium- to long-term.

Several interviewees indicated that many businesses in the Study Area do not seem to keep regular hours or are reliably open. Two resident focus group participants followed up with the consulting team after the focus group session was held to specifically say they wanted to support local businesses and restaurants, especially during the pandemic, but could not count on businesses being open when they said they would be.

Likewise, several interviewees, including both business owners and large employer representatives, noted the need for technical assistance or training for Study Area business owners on the basics of business operations and planning. They referenced the kind of training that is offered by Small Business Development Centers (SBDCs) and funded by the U.S. Small Business Administration, which are typically housed in economic development offices and universities or possibly by Innovation Works, which assists small, start-up businesses as part of building sustainable neighborhood economies in Baltimore. As discussed later in this report, Innovation Works may offer similar programs and services at the new resource center that LifeBridge Health and its subsidiary the West Baltimore Renaissance Foundation are developing at Franklin Square, near the Grace Medical Center.

### **Role of Southwest Partnership and the City**

Most, but not all interviewees were aware of Southwest Partnership's work to improve and revitalize the community. Some specifically cited Southwest Partnership for providing façade grants and connecting them with other programs. In particular, they were complimentary of the business relationship manager in conveying their needs and concerns.

A few business interviewees, however, indicated they were not sure of what Southwest Partnership could do for them. They indicated a need for outreach and clarification on the role of Southwest Partnership. Two businesses mentioned they had connected with the West Baltimore Street Commercial Property and Business Owners Association (CPBO) and that the interaction was positive. One of these indicated that a more traditional business association in the area would be helpful so that area businesses could come together to identify opportunities and address challenges in the area.

It should be noted that there is a palpable feeling of mistrust among some businesses and property owners with Southwest Partnership. This is likely the result of decades-old practices that existed long before Southwest Partnership was created. Some of the interviewees and focus group participants believe that systematic processes that have been both harmful and exclusionary to the Black business and property owners from the City and community associations, continue today. Those who voiced their concerns believe that Southwest Partnership has a key role in building bridges and addressing gaps. This may require a change in approach and systems that goes beyond this market study.

A few indicated that the City, specifically the Baltimore Development Corporation (BDC) should do more to support local businesses and attract new ones to the area. This includes marketing and promotion. One cited an issue with the quality of the contractor selected by BDC to do work as part of a façade grant. Another indicated that the City and/or Southwest Partnership should offer more technical assistance to local businesses working with the Baltimore City Commission for Historical and Architectural Preservation (CHAP) and other City agencies as they seek to improve their properties.

## **Key Findings/Analysis of Community Feedback**

### *Survey*

- BAE developed a consumer survey about shopping patterns. It was distributed in English and Spanish, with 160 and 9 responses, respectively.
- Both versions of the survey were available online at SurveyMonkey.com and distributed using a weblink and QR code.
- Approximately 52 percent of the English survey respondents live in zip code 21223, which includes the Study Area. The second most common response was zip code 21230, which includes Pigtown, Federal Hill and Locust Point.
- In the English version of the survey of respondents who shopped or went to restaurants, cafes or bars, the most popular City neighborhood for that was Federal Hill/Locust Point, followed closely by Pigtown and West Baltimore Street/Hollins Market.
- Though Baltimore Street/Hollins Market got the most votes—it is likely most survey respondents live in Hollins Market area—nearby Pigtown was the most common second choice. It is likely then that Hollins Market is leaking sales to Pigtown.

- On a yes or no question asking, 'do you currently shop on West Baltimore or in Hollins Market and immediate surrounding area,' 50 percent said no despite the fact that a large number of the respondents live in zip code 21223, the location of West Baltimore Street and Hollins Market.
- The 50 percent response for shopping in the Study Area points to weaknesses in the availability and diversity of retail options on West Baltimore Street. New retail options may help to improve demand.
- Businesses respondents indicated they most frequently visited include Charm City Books, Juice Lab, Zella's, Hollins Market, Primo's Chicken, Silver Moon and Mulberry's.
- Respondents indicated that the types of businesses they would support if they were located on West Baltimore Street or Hollins Market were Restaurants, ethnic/specialty (79 percent), Bakery (75 percent), Coffee House (64 percent), Gourmet or international food market (55 percent) and Restaurant, Non-specialty (50 percent).
- When asked what impediments or constraints limit the inclination to patronize businesses on West Baltimore Street or Hollins Market, the top answers were 'Area doesn't offer businesses I frequent' (58 percent) and the second most frequent response was 'I'm unfamiliar with businesses in these areas' (17 percent), followed by Crime or perception of crime (9 percent).

#### *Focus Groups and Interviews*

- The BAE Team interviewed representatives of 11 businesses located in the Study Area as well as the anchor institutions/non-profits in the area: UM BioPark, LifeBridge, and Bon Secours.
- Two focus groups were held—a business and property owners group and a resident group. Both were virtual.
- Many, especially the Hollins Market vendors, noted that their customers were seniors and area residents using EBT for food and groceries.
- Most interviewees indicated their customers were primarily from Southwest Baltimore, though a portion came from other parts of the City and Baltimore County. Many of these customers work in the immediate area.
- West Baltimore Street merchants believe area residents patronize convenience/food stores, restaurants (mostly carry-outs) and personal services businesses (e.g., barber shops, beauty salons) the most.
- Several of the interviewees in all categories noted that residents would like a real grocery store on West Baltimore Street rather than bodega type markets. An international or specialty food store was also mentioned by several interviewees.
- Virtually all the business interviewees and participants indicate that the Study Area suffers from a reputation of being unsafe. Several reflected that concerns about crime are discouraging customers away who used to patronize the stores.
- Employees of Study Area anchors comprise a large portion of potential customer base for shops and restaurants in the Study Area, though UM BioPark and Wexford

interviewees estimate that perhaps 40 to 50 percent of their workforce are still on hybrid work schedules resulting from the Covid pandemic.

- Still, the institution interviewees believe that their employees would patronize local businesses if more of them met their needs. Their employees would likely patronize more restaurants and carry-outs at the higher-end with healthy food options.
- The institution interviewees indicated there is demand among their employees for bars for happy hours and cafes with high quality coffee.
- The large employers also mentioned the need for childcare services, more parks, and a dog park.
- Some residents who indicated they wanted to support local businesses, expressed that they found that several local businesses do not keep regular hours or are reliably open.
- Several interviewees, both business owners and institution representatives noted the need for technical assistance or training for Study Area business owners on the basics of business operation and planning.

## Market Analysis Conclusions

- There has been a population decline in the Study Area, Southwest Partnership neighborhoods, and the West Baltimore Street Trade Area that results in a smaller market base.
- Increasingly high vacancy rates points to fewer housing options in the area for potential new residents to help offset overall population loss.
- The leakage analysis shows there are high levels of spending in the Trade Area for Food and Beverage Stores, Food Services, and Drinking Places categories.
- The leakage analysis also indicated high demand in the General Merchandise category, which includes businesses like Wal-Mart and discount stores that are too large for this area; however, there is potential demand for the components of this category including Clothing and Apparel, Home Furnishings, and General Household Supplies in smaller stores.
- Survey respondents indicate they would likely support the following types of businesses in the Study Area if they were added:

○ Restaurants, Ethnic/Specialty	79%
○ Bakery	75%
○ Coffee House	65%
○ Gourmet or International Market	55%
○ Restaurant, Non-Specialty	50%
- The top response to the survey question asking what limits respondents' inclination to patronize businesses on West Baltimore Street or Hollins Market was the 'Area doesn't offer businesses I frequent' (58 percent) and the second most frequent response was 'I'm unfamiliar with businesses in these areas' (17 percent), followed by Crime or perception of crime (9 percent).



- Most businesses interviewed indicated that most of their customers come from Southwest Baltimore, and primarily from the Southwest Partnership neighborhoods. This is an important part of the customer base to continue to serve.
- The anchor institutions believe their employees would support more Study Area restaurants and carry-outs with healthy food options, bars with happy hours, and cafes with high quality coffee.
- Residents and major employees would like to see other amenities in the area including childcare services, more green spaces, and a dog park.
- Small businesses in the area may need some technical assistance/training in business operation and planning to help them succeed.
- Though a few business owners and representatives of anchor institution expressed concern about gentrification in the Study Area, there is no evidence from area demographics or the market study that this is an imminent concern. Investment in the area is needed and Southwest Partnership should encourage, with incentives or help with entitlements, that new investment be locally-based when possible.

## KEY PLANNED OR POTENTIAL DEVELOPMENTS

As the Southwest Partnership considers how best to expand and/or enhance the retail market on West Baltimore Street, Hollins Market and the surrounding area, several key planned or proposed developments in and around the Study Area have the potential to impact the process, mostly in a positive way. The four developments or initiatives are:

- Hollins Market – Interior Improvements in Market and Head House Retooling
- LifeBridge (West Baltimore Renaissance Foundation) Resource Center
- UM BioPark – 4MLK Building
- “Highway to Nowhere” Redevelopment – “Reconnecting Communities in West Baltimore”

These projects, summarized below, should be considered by Southwest Partnership as it implements items from the Action Plan included in this report. In several cases, especially when the projects are funded and in the development pipeline, they are specifically referenced in the Action Plan.

### Hollins Market

The Baltimore Public Markets Corporation (BPMC), which oversees all of Baltimore public markets, is about to embark on reconstruction of the market stalls in Hollins Market. The BPMC will be ready to submit for City permits by September 2022, with construction soon thereafter. The work will include installing new kitchen equipment in the market stalls. It is hoped that the newly reconstructed stalls will help recruit new vendors to the market. BPMC is

especially interested in recruiting a bakery, a fresh and prepared seafood vendor, and a fresh and prepared chicken vendor. As of August 2022, there are just five vendors in Hollins Market.

In addition to the Hollins Market renovations, BPMC is currently considering proposals for the redevelopment and long-term lease of the Hollins Market Head House. The Head House, pictured below, is an iconic two-story, 11,964 square foot building that dates back to the 1860s. BPMC issued a Request for Proposals (RFPs) for the redevelopment of the Head House in April 2022, with responses due back by June 30, 2022. According to the RFP, BPMC is looking “to promote the repurposing and re-imagining of the Head House property into a vibrant space that enhances and fits into the existing fabric and context of the Hollins Market neighborhood and adjacent properties while retaining the historical and architectural elements of the Head House.”

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**Figure 13: Hollins Market Head House**

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The Head House is a large building and depending on the project selected, has the potential to have a major impact on the Hollins Market area, and potentially on the part of West Baltimore Street nearby. BPMC expects to announce the redevelopment team and project for the Head House in Fall 2022 once the selection committee completes its review. It should be noted that the selection committee includes a Southwest Partnership staff member.

### **West Baltimore Renaissance Foundation Resource Center**

The West Baltimore Renaissance Foundation, Inc., which was created in 2019 when LifeBridge Health, Inc. (LifeBridge Health) expanded into West Baltimore with its acquisition of Bon Secours Hospital Baltimore, Inc. LifeBridge Health, which renamed the hospital facility Grace Medical Center, is in the process of creating a resource center, an effort led by the West Baltimore Renaissance Foundation. The resource center, pictured in the rendering below, will be located at the corner of North Calhoun and West Baltimore Streets near Grace Medical Center.

The resource center, which is expected to open in March 2023, will be home to several LifeBridge Health entities including the West Baltimore Renaissance Foundation, VSP (workforce development), and Center for Hope (trauma and violence response programming). There will also be five third party tenants with suites from 2,200 to 3,300 square feet including Baltimore’s Promise (main office/operations), Innovation Works (main office/operations), NAMI (part-time occupant, mental health services), and Byte Back (digital



literacy center). Innovation Works will be hosting their main programming supporting enterprises and social enterprises. The resource center will also include a commercial kitchen and teaching kitchen. The West Baltimore Renaissance Foundation recently issued an RFP for the kitchen.

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**Figure 14: West Baltimore Renaissance Foundation Resource Center**

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It is important to note the West Baltimore Renaissance Foundation is a strong supporter of the Southwest Partnership and West Baltimore as a whole. The foundation focus is on improving social determinants of health including workforce development, youth mentoring, food access,

and population health. The foundation provides small neighborhood grants up to \$2,500 for organizations located in zip code 21223. They also provide program related grants that range from \$5,000 to \$350,000.

### UM BioPark Gateway

The UM BioPark is planning a new 258,000 square foot Gateway building at the corner of West Baltimore Street and Martin Luther King Boulevard. The building, shown in a rendering below, will house R&D labs and offices. Once complete the Gateway building will be the largest commercial building with a Martin Luther King Boulevard address.

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**Figure 15: UM BioPark Gateway Building**

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The groundbreaking for the Gateway building is expected to occur in Fall 2022. It will open in 2024 and is expected to be occupied by 1,000 employees when fully operational. That will almost double the current employment at the BioPark. This large number of employees would almost certainly have an impact on demand for retail and restaurants on West Baltimore Street.

### “Highway to Nowhere” Redevelopment – Connecting Communities in West Baltimore

Baltimore City is seeking a federal grant from the U.S. Department of Transportation for the Reconnecting Communities Pilot Program to do advanced planning around removal of a 1.4 mile stretch of Route 40 that was built 50 years ago in an aborted attempt to connect Interstate 70 with Interstates 83 and 95 in Baltimore’s Central Business District. Located just 3 ½ blocks north of Baltimore Street, construction of this road, nicknamed the Highway to Nowhere, resulted in the demolition of 971 homes, 62 businesses, subsequently displacing approximately 1,500 residents, many of whom were of African American descent.

Baltimore City, led by its Department of Transportation, in conjunction with the Department of Planning, is seeking a federal grant through the Reconnecting Communities Pilot Program to

help advance improvements in the large swath of West Baltimore that was adversely affected by the highway construction. If the City is awarded the grant, the planning study will assess existing conditions, opportunities, and constraints including constructability, multimodal traffic circulation, market demand, and project financing. There is some early discussion about using the gulch that was dug for the Highway to Nowhere to accommodate a new east-west transit line. Whether or not the planning effort results in improved east-west transit, the Study Area is in a good position to benefit from the project.

## ACTION PLAN

After a thorough review of the demographics of the Study Area and Southwest Baltimore, the results of the retail market survey, and direct input from interviews and focus groups involving businesses, residents, non-profits operating in the area and institutional anchors, BAE recommends the following actions that Southwest Partnership and associated community stakeholders can take to meet a goal of strengthening the retail market for the West Baltimore Street-Hollins Market area. Each action listed in the plan includes a brief description of what is proposed, its importance relative to the goal, the timing, and the party or parties responsible for implementation. In addition to immediate, timing is included as short-term (within 18 months) medium-term (18 months to three years), and long-term (three years and beyond). Some of the actions are already underway or contemplated by Southwest Partnership and if so, are included here in recognition of their importance.

### **1. Focus Marketing Efforts on Attracting Restaurants, Specialty Food Markets and Select Retail**

Interviews, focus groups and surveys reveal that the number one reason why people do not patronize West Baltimore Street and the Hollins Market area is that the area does not offer what those asked want in terms of retail and restaurants. Additionally, in general, there is little offered presently for younger age cohorts, i.e., under age 35. The input received indicates that the types of businesses area residents and employees would support include more restaurants, particularly international restaurants, specialty food markets including those selling prepared food of the international or gourmet variety, and select retail. Retail types mentioned by more than individual contacted for the study include a high quality coffee shop, a pet store, and an ice cream shop.

This may involve targeting businesses in these categories that already have locations in Baltimore and are potentially interested in expanding or pop-up businesses elsewhere in the City that are successful enough to consider permanent brick and mortar locations. This could involve, in the longer-term, using the Baltimore Development Corporation to market the area at International Shopping Center Conference regional and national meetings.

Importance to goal: Attracting new retail and restaurants is key to strengthening the Study Area retail market.

Timing: Short-term and ongoing

Party/Parties: Southwest Partnership (lead), with support from the Baltimore Development Corporation and property owners.

## **2. Support a Program Offering Technical Assistance or Coaching to Existing Businesses on Business Planning and Operating Best Practices**

According to comments made on the survey, feedback from business interviews, and focus group input (during and after the actual sessions), some of the businesses located in the Study Area, are inexperienced business owners and unfamiliar with standard business practices that help businesses succeed. Some need assistance with developing business plans and general marketing, while others need coaching on good business practices such as keeping regular hours, and maintaining aesthetically appealing entrances, etc. Southwest Partnership should support coaching/technical assistance for existing and new businesses. Businesses that engage in good business practices are more likely to be successful and more likely to contribute to the overall fabric of the corridor and neighborhood.

This type of technical assistance or coaching could potentially be provided by Innovation Works, which will reside in the LifeBridge/West Baltimore Renaissance Foundation resource center which is scheduled to open in March 2023. This type of assistance is also offered by Small Business Development Centers (SBDCs). The Baltimore SBDC location closest to Southwest Partnership is on the University of Maryland Baltimore campus at 620 Lexington Street. Southwest Partnership has been a partner with the SBDC for several years. SBDC is conducting a business clinic in West Baltimore in September 2022, which Southwest Partnership is promoting for local businesses and residents interested in starting or growing a business to attend.

Importance to goal: Helping Study Area merchants improve their business operations and business planning skills should lead to more sustainable businesses, which will help strengthen the retail market.

Timing: Short-term and ongoing

Party/Parties: Innovation Works, Small Business Development Center, in cooperation with West Baltimore Renaissance Foundation and Southwest Partnership.

### **3. Establish a Pop-Up Program to Help New Retailers/Restaurants to Test and Grow Their Businesses**

Other Baltimore community development corporations similar to Southwest Partnership, including Central Baltimore Partnership, have established pop-up programs in vacant storefront buildings. There are two places in the Study Area where pop-ups could work well: the 1000 block of West Baltimore Street, which is located near the UM BioPark, and the Hollins Market area. The former is a block that was restored/rehabilitated in recent years and the latter is a tight concentration of commercial space that is in effect a mini-retail center. The benefits of pop-ups include reimagining vacant storefronts, corridor activation, brand activation for area and the business itself, affirming retail success. Southwest Partnership could help identify sites and contact willing property owners, and help guide pop-up operations through the permitting process for short-term occupancy, as well as other requirements (e.g., liability insurance). The National Development Council's Technical Assistance Program for Creative Use, which provides free concept design programs and building and zoning code interpretation is an excellent guide both Southwest Partnership staff and the pop-up businesses.

Importance to goal: Pop-ups give start-up businesses a chance to test their markets and if successful move into brick and mortar spaces on a more permanent basis which would strengthen the Study Area retail market. Also, pop-ups occupy vacant spaces which enliven the area for the time period they operate.

Timing: Short-term – Long-term (or as long as there are vacant storefronts)

Party/Parties: Southwest Partnership (lead), in conjunction with Made in Baltimore, which supports makers and manufacturers in Baltimore City and itself has a pop-up program and MICA Made, an on-line marketplace for Maryland Institute College of Art students, faculty and alumni, which can contribute items for sale for pop-ups.

### **4. Pursue Baltimore Main Street Designation**

Southwest Partnership should pursue Baltimore Main Street designation, as is noted in the 2015 Vision Plan. Main Street designation would provide support and resources to help attract new businesses and help existing businesses grow stronger. Baltimore's Main Street can provide support for the types of activities referenced in this action plan specifically marketing and event planning, financial assistance for design and promotions, architectural services for façade renovations, streetscape improvements, etc. BAE understands that Southwest Partnership is currently working with the Mayor's Office of Minority and Woman Owned Businesses, which manages the Baltimore Main Street program, on their Main Street application. Including this in the action plan, emphasizes the importance of the step.



Importance to goal: If Southwest Partnership is able to get West Baltimore Street Baltimore Main Street designation, West Baltimore Street would then be able to obtain technical support and financial resources toward the goal of strengthening the retail market in the Study Area.

Timing: Immediate

Party/Parties: Southwest Partnership, in conjunction with the Mayor's Office of Minority and Women-Owned Businesses.

#### **5. Engage Directly in the City's Efforts in Planning and Redevelopment of the "Highway to Nowhere"**

Southwest Partnership will be directly affected by whatever comes from the planning process for the deconstruction or redevelopment of the Highway to Nowhere that lies just 3 ½ blocks north of West Baltimore Street. If Baltimore City wins the federal grant through the Reconnecting Communities Pilot Program to help advance improvements in the large swath of West Baltimore, Southwest Partnership needs to be at the table in the planning process. Whatever is planned for the reclaimed highway space will have an impact on the Study Area, especially as one of the possible outcomes could be improving east-west transit, something that would be helpful to both residents and employees.

Importance to Goal: The elements of the plan for the deconstruction or redevelopment of the Highway to Nowhere have the potential to affect the viability of the retail market on West Baltimore Street and the customer base (i.e., residents and employees) for the area.

Timing: Short-term – Long-term

Party/Parties: Southwest Partnership, Baltimore Department of Transportation, Baltimore Department of Planning, and UM BioPark.

#### **6. Conduct Focus Groups with UM BioPark and Grace Medical Center (LifeBridge Health) Employees to Understand What Retail They Would Support in the Study Area**

Working closely with Southwest Partnership Board members representing UM BioPark and LifeBridge Health, schedule and conduct special focus groups for employee volunteers willing to provide feedback in person on what types of retail they do or would patronize in the West Baltimore Street-Hollins Market area. These sessions should be led a someone well-versed in public engagement and refreshments (i.e., breakfast or lunch) should be provided. When and if everyone returns to working on-site at UM BioPark and Grace Medical Center, there are 1,400 employees who would potentially be part of the customer base for West Baltimore Street-Hollins Market area. Once the new Gateway building is complete, there will be another 900-1,000 employees on the BioPark campus.

Importance to Goal: The large number of employees of the anchor institutions in the area should be considered potential customer base for the retail market of the Study Area. Their feedback is important as Southwest Partnership considers planning priorities.

Timing: Short-term – Medium Term

Party/Parties: Southwest Partnership, UM BioPark, Grace Medical Center (LifeBridge Health).

### **7. Support, and to the extent possible, engage in the work of the West Baltimore Renaissance Foundation/LifeBridge Health Resource Center**

LifeBridge Health is making a substantial investment in the western edge of the Study Area near Franklin Square. This includes \$85 million in the hospital for an emergency room, new operating rooms and other services that maximize partnerships with Sinai Hospital and its new pediatric services and new woman's center. Additionally, LifeBridge Health has committed funds for a new resource center, now under construction, which will include offices for the West Baltimore Renaissance Foundation, as well as other LifeBridge Health entities and non-profits that provide programs and services to area residents and small businesses. One of the non-profits, Innovation Works may provide technical assistance support to area enterprises and businesses. The resource center is also planning to provide commercial kitchen space and a teaching kitchen for food business start-ups that could eventually operate in brick and mortar spaces in Study Area. Finally, and perhaps most importantly, the West Baltimore Renaissance Foundation will be providing grants to support improving the social determinants of health, workforce development, youth mentoring, food access, and population health in the area. These include small neighborhood grants up to \$2,500 for organizations in zip code 21223 for one-time events/activities and program related grants ranging from \$5,000 to \$350,000. As such, Southwest Partnership and the West Baltimore Renaissance Foundation can support each other in expanding opportunities for new businesses and business initiatives that will strengthen the West Baltimore Street-Hollins Market area retail market. Southwest Partnership can refer budding entrepreneurs to the resource center and the resource center clients can potentially occupy pop-up or brick and mortar spaces on West Baltimore Street or the Hollins Market area.

Importance to Goal: The focus of several of the programs and resources to be provided at the resource center are in line with Southwest Partnership's goal to strengthen the Study Area's retail market.

Timing: Short-term and ongoing

Party/Parties: West Baltimore Renaissance Foundation, LifeBridge Health, Innovation Works, Southwest Partnership.

## **8. Sustain and Expand as Appropriate Clean and Green and Defensible Spaces Initiatives, Especially Along West Baltimore Street**

The results of the survey conducted for this study document the importance of the aesthetics and feel of the commercial districts that make up the Study Area. Real or perceived safety issues were cited by some survey respondents as a reason why they did not patronize retail and restaurants, especially on West Baltimore Street. Often cleanliness and streetscape maintenance are part of perception of safety in places. Accordingly, it makes sense for Southwest Partnership to sustain and expand as needed the Clean and Green and defensible spaces initiatives. Bon Secours and UM BioPark have supported the Clean and Green efforts historically. Southwest Partnership has secured funding for defensible spaces initiatives through the Baltimore Regional Neighborhood Initiative grants provided by the Maryland Department of Housing and Community Development.

Importance to Goal: The appearance of and perceived safety of West Baltimore Street-Hollins Market area affects its appeal to potential retail customers. Sustaining and expanding the Clean and Green program and defensible space initiatives help to remove perceived barriers to supporting retail business in the area.

Timing: Short-term and ongoing

Party/Parties: Southwest Partnership, with funding from anchor partners and the Maryland Department of Housing and Community Development.

## **9. Schedule Events to Celebrate All Good News Announcements in the Study Area**

Part of selling an area to encourage new business and investment is spreading the word of any and all good news. Spreading the word on positive developments help make the place appear to be moving in the right direction. Any good news including funding announcements, groundbreaking and ribbon cuttings should be placed on social media (i.e., Facebook, Instagram, etc.) and the press page on Southwest Partnership's website, but there should be scheduled events for some the good news announcements. Interestingly, this has become more important in the Covid time period, as people have been disconnected from places for so long that they need to reconnect directly to appreciate the significance of improvements. At least two good news announcements will be made in the coming months: the groundbreaking for the UM BioPark Gateway building in Fall 2022 and the opening of the West Baltimore Renaissance Foundation/LifeBridge Health in Spring 2023.

Importance to Goal: Good news events help establish the perception that an area is moving forward positively. It encourages new business along the commercial corridor as well as investment in the area.

Timing: Short-term and ongoing

Party/Parties: Southwest Partnership, sponsor of development or funding initiative.

### **10. Update the Vision Plan for Southwest Partnership**

According to Maryland Department of Housing and Community Development officials, in the last year the state requested that BRNI grantees update their vision plans. While the 2015 Vision Plan is an excellent document, the plan does appear to need some updating. For example, the Bon Secours hospital is gone and replaced by LifeBridge Health's Grace Medical Center. While this does not sound like this is an urgent request, it would be helpful in future funding rounds to have an updated document.

Importance to Goal: Funders appreciate the latest, most updated information so they can make informed decisions about funding requests. The BRNI funds are critical to the overall mission of Southwest Partnership and be association, to the goal of strengthening the retail market in the Study Area.

Timing: Short- to Medium-term

Party/Parties: Southwest Partnership and Maryland Department of Housing and Community Development.

### **11. Continue to Seek Funding for Building Rehabilitation and Commercial Infill on Vacant Lots**

Southwest Partnership has aggressively sought financing for acquisition, demolition and rehabilitation of buildings for commercial, mixed use, and housing, along with other smaller projects. Between 2016 and 2022, Southwest Partnership received \$4.645 million in BRNI and CORE funds from the State. The Partnership should work to seek that funding as there are still many improvements that need to be made on West Baltimore Street alone. This effort should directly involve property owners, including identifying sources to help them make improvements to buildings for new businesses. It should also look for leveraging opportunities for larger projects with New Markets Tax Credits, Historic Tax Credits (State and Federal), and Enterprise Zone tax credits could be part of larger projects. The Baltimore Development Corporation offers \$20,000 matching grants for façade improvements to owners of commercial properties. Beyond this, Southwest Partnership must look for funding opportunities with philanthropies and intermediaries including The Reinvestment Fund and others, for assistance with physical development.

Importance to Goal: In order to be able to strengthen the local market, the Southwest Partnership needs to continue to raise funds for projects, particularly for building rehabilitation and stabilization, and acquisition of vacant properties to plan for infill development.

Timing: Short-term and ongoing

Party/Parties: Southwest Partnership, Maryland Department of Housing and Community Development, The Reinvestment Fund and other sources.

## **12. Establish a Southwest Speaker Series on Urban Issues**

To elevate the awareness of the Southwest Partnership and Southwest Baltimore in general, establish a speaker series, perhaps annually, to provide perspective on current urban issues, especially those affecting people of color. These could include talks on a range of topics from affordable housing to best practices for small business formation to environmental justice. This type of educational series would likely attract sponsorship and could include other community development non-profits in Baltimore in planning and funding. Potential partners in this effort could include the Baltimore Chapter of the Urban Land Institute and Agora SNFCC, an international organization that supports a reimagining of public space and creating community and is working in Baltimore through the Johns Hopkins University. The events could be held at UM BioPark or LifeBridge Health facilities with meeting space to accommodate a medium to large-sized audience (50 or more). Some ideas for speakers include:

- Majora Carter, an urban revitalization specialist, MacArthur Fellow, and owner of the Boogie Down Grand Café in Bronx, New York. Her 2022 book, *Reclaiming Your Community: You Don't Have to Move Out of Your Neighborhood to Live in a Better One* explores issues of community, gentrification and home.
- Michael Twitty, author, teacher, and culinary historian. He runs the food blog, Afroculinaria, where he explores the topic of culinary justice in relation to African American and Diasporic foodways. He won the James Beard Foundation Book Award in 2018 for his book, *The Cooking Gene*. He lives in Washington, D.C.
- Sacoby Wilson, PhD, is a professor at the University of Maryland School of Public Health. He is an expert in environmental justice, environmental health disparities, the built environment, and climate change. He is based in College Park, Maryland.

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## **Businesses**

Jim Ari, Zella's Pizzeria

Candice Bruno, Old Major Restaurant

Aisha England, England Eatery

Ali Eshghi, Primo Chicken

Lisa Gee, Lisa's Tax, Tag & Title Services

Hollins Market Vendors: Eddie's Lunch, L&R Produce, Lauman's Meats and Mulberry's Bar.

Toula Kelepeisis, Bill's Place

Troy Stanton, Independent Barber and local volunteer

## **Anchor Institutions/Other**

Rebecca Altman, LifeBridge Health

Madison Haas, University of Maryland, Baltimore, Office of Community Engagement

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Bill Joyner, University of Maryland, Baltimore Office of Equity, Diversity, and Inclusion

George Kleb, Bon Secours Community Works

Kristen Mitchell, Baltimore Public Markets

Jane Shaab, UM BioPark

Kurt Sommer, West Baltimore Renaissance Foundation (LifeBridge Health)