

## **Retail Strategy for Downtown Baltimore**

### **Executive Summary**

Downtown Baltimore is emerging as a leading destination for local and national retailers. The pace of new store openings is quickening as more residents move into Downtown, more housing developments open with a ground-floor retail component, and as the city moves forward with high-profile new projects. This combination of new residents, additional hotel rooms and new attractions has excited retailers about Downtown over the past few years.

Where once there was a “chicken and egg” relationship between residential and retail development in Downtown Baltimore – residents were reluctant to live where their access to goods and necessities was limited, while retailers would not locate where the customer base was small – now there is a symbiotic relationship between residential development and retail growth.

This began to change over the past ten years as The Partnership’s Downtown Housing Initiative, together with major public and private sector investments, helped dramatically increase the number of Downtown residents to more than 37,000. While the new residential developments have been coming online, The Partnership and Baltimore Development Corporation (BDC) were laying the groundwork for new Downtown retail investments.

According to The Partnership’s annual *State of Downtown Reports*, Downtown employment is up 6.8 percent to more than 100,000. Development projects worth \$3.17 billion are underway through 2008. Reflecting the need for both service and goods-oriented retail, more than 60 new retailers recently committed to Downtown, including top national brands such as:

- Best Buy;
- Bedrock;
- Chipotle;
- Cosi;
- Filene’s Basement;
- Office Depot;
- Starbucks; and,
- Urban Outfitters.

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## DOWNTOWN BALTIMORE : *Outlook 2012*

All signs point to sustained residential growth Downtown driven by young professionals and retiring baby boomers. According to recent data, collected by The Sage Policy Group for The Partnership, this growth will be aided significantly by the addition of more than 17,000 new jobs from the federal Base Realignment and Closure (BRAC) process, the new biotech facilities opening at the University of Maryland and Johns Hopkins medical campuses, as well as the expansion of the four Downtown area hospitals.

To better attract retailers and direct retail investment, The Partnership has initiated a multi-stage retail planning process. In October 2005, The Partnership, in conjunction with BDC, the Baltimore City Department of Planning, and the Charles Street Development Corporation released Part One of this effort: the *2005 Downtown Baltimore Retail Market Assessment* (Addendum 1). The *Assessment* established baseline demographic information and examined key factors in retailers' location decision-making process, as well as future retail trends. The data that emerged from the *Assessment* illustrates Downtown's retail strength.

Within a 1-mile radius of the Downtown core, the *2005 Assessment* found that:

- Downtown Baltimore ranks 8<sup>th</sup> in the country for population density (37,000) and in the number of households (3,145) earning \$75,000 or more, making Baltimore comparable to Denver, Boston, and Washington, D.C. These numbers are echoed in the more recent Demographic Analysis conducted by The Partnership and the Jacob-France Institute of the University of Baltimore (JFI) in the summer of 2006.
- Baltimore City ranks 10<sup>th</sup> among the top 25 U.S. metro areas with a per capita income of \$35,556, making the region comparable to Philadelphia and Chicago.
- Downtown Baltimore ranks 16<sup>th</sup> for total employment with 102,812 jobs, similar to Cincinnati and Atlanta.
- The economic data routinely used by developers and retailers when deciding where to locate new stores is insufficient to show the dramatic recent improvements to Baltimore's demographic profile.
- In 2001, housing demand was estimated at approximately 5,300 new units over a five year period. Since then, 4,000 units have been built or are currently under construction. Rents are in an uptrend and sales prices are also rising steadily, a strong indication that demand is outpacing supply. The 2006 update for housing demand estimates that 7,400 new units need to be delivered by 2011.

The Partnership is utilizing the *2005 Downtown Retail Market Assessment* as the foundation upon which to build the detailed retail development strategy outlined in this report. The strategy focuses on the following main themes:

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DOWNTOWN BALTIMORE : *Outlook 2012*

- Demographics & Marketing;
- Retail Recruitment;
- Retail Clustering;
- Retail Building Program;
- Authenticity & Placemaking;
- Incentives; and,
- Site Specific Recommendations.

## **Demographics & Marketing**

Retailers make location decisions based upon the dominant demographics and expected growth of any given area. The new data emerging about Downtown Baltimore's demography should make it very competitive to new retail, particularly within a one-mile radius of Downtown's core. To maximize this effectiveness, economic development officials and real estate professionals should aggressively market the data to retailers as outlined below.

### Demographics

*Utilize the 1-mile radius demographics established in the Retail Assessment (October 2005)*

- Create marketing materials focusing on the strength of 1-mile radius from Downtown's core to recruit retailers.
- Encourage everyone involved in retail recruitment or promotion of Baltimore, including developers, brokers, elected officials, economic development officials, and BACVA, to utilize this standard set of data.
- Send updates and provide respective marketing materials to users.
- Distribute demographic data to retailers and brokers at International Council of Shopping Centers (ICSC) conventions and individual meetings.
- Include demographic data in any print mailings to retailers and brokers.
- Make all information available on the Downtown Partnership website.

Research, review, and assess the demographics and buying power of neighborhoods adjacent to Downtown (Federal Hill, Fells Point, Canton, etc.) and incorporate this information into retail recruitment marketing materials. Residents in these neighborhoods will shop Downtown.

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Complete pedestrian counts for key existing and future retail intersections in order to provide further information for recruitment purposes.

- Potential intersections could include:
  - Charles and Saratoga Streets;
  - Eutaw and Baltimore Streets;
  - Pratt and Calvert Streets;
  - Pratt and Light Streets;
  - Pratt and Market Streets.

Review CoStar traffic counts.

- Select intersections, including those used for pedestrian counts.
- Incorporate into documentation.

Create an interactive/GIS mapping system for existing retail development in Downtown, that includes:

- Downtown retail totals as the first layer of each map;
- Demographic break-downs for each neighborhood within Downtown;
- Annual totals from the State of Downtown report (e.g. number of employees, residents, students, etc.);
- Development pipeline (e.g. housing units under construction, in planning; hotels under construction, in planning, etc.);
- Number of retailers, types of retail, lists of high-end or well-known retailers, square footages, rental rates, etc.
- (Note: this information could be completed first as a Power Point document.)

Distribute information via website, print materials and conferences. Encourage developers and brokers to utilize these materials in recruitment efforts.

### Marketing

As stated in the Demographics section above, all marketing materials should reflect a 1-mile radius of Downtown's core and recognize that adjacent neighborhoods can contribute users of Downtown retail and locations for future retail expansions. Specific marketing recommendations include the following:

Continue Baltimore's presence at ICSC.

- Encourage developers and brokers to include agency staff as part of initial discussions with retailers.
- Coordinate retailer meetings to best target specific retailers for locations and avoid any overlap or confusion for the retailers.

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Increase amount of advertising in national retail publications.

- Create comprehensive and attractive insert on Downtown retail for national retail publications.
- Broaden presence on web.
- Determine additional national retail websites to which Downtown Partnership can link.

Implement a public relations campaign to tell Downtown Baltimore's emerging retail story.

- Research and select appropriate national publications, including non-retail publications.
- Contact respective members of the publication to pitch story.
- Include demographics, retailers' success stories, and overall quality of life.

Initiate an umbrella marketing campaign, geared to shoppers, to encourage Downtown shopping.

- Identify best means and methods of reaching Baltimore metro area shoppers.
- Capitalize on the sense of place and uniqueness within Downtown, and its distinct shopping experience, to draw more consumers.
- Create incentives for shoppers such as free/reduced parking, discounts, etc.
- Work with retailers to identify the needs and interests of the target audience.
- Increase outreach to hotels and their guests.
- Partner with existing agencies and organizations, such as:
  - Baltimore Area Convention & Visitors Association;
  - Baltimore Development Corporation;
  - Baltimore Main Streets;
  - Historic Charles Street Association;
  - Market Center Merchants Association;
  - Restaurant Association of Maryland; and
  - Westside Renaissance.

### Retail Recruitment

For decades, retailers did not locate in urban areas because the suburbs offered inexpensive land close to more densely populated suburban markets. Slowly, retailers are returning to downtowns, although many struggle with reinventing their successful suburban retail models (e.g. pad sites, mall locations, and parking). Cities require retailers to develop new models that maximize the space and frontage available to them in urban areas. Accordingly, Baltimore must market itself in ways that overcome perceived obstacles to opening stores Downtown. This marketing should stress Downtown Baltimore's demographic strengths and differentiate Downtown from the surrounding suburbs. Specific recommendations include:

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Create a targeted list of potential retailers that Baltimore's residents would like to have located in Downtown.

- Include national and regional chains, local or independently owned and operated restaurants, boutiques, specialty stores, and services. While department stores, particularly higher-end department stores and/or mid-range multi-service stores such as Target, will be part of the recruitment list, they are not to be considered as the sole focus for a retail anchor.
- Assess each retailer's needs (space requirements, median household income, parking, etc.).
- Determine potential Downtown locations for each retailer on the list.
- Include appropriate broker or corporate contact.

Gather sales per square foot information for existing Downtown retailers.

- Obtain information for major national retailers.
- Provide confidentially upon request to retailers, brokers and developers.

Create informational sharing opportunities to expand recruitment efforts.

- Hold quarterly meetings with developers and brokers.
- Strive to hold meetings at a time and location, including in the counties, which is convenient for developers and brokers located outside of Downtown.
- Review available space, retailers seeking a Downtown location and updated demographic information.

Expand outreach beyond retailers to include those with experience in retail real estate.

- Pursue local and national developers who have contacts and a successful history with retail clients and tenants.
- Establish relationships with a broader variety of brokers who have extensive retail experience.
- Collaborate with architects and contractors who have worked on retail developments.

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Strengthen and coordinate agency recruitment efforts.

- Include Downtown Partnership, BDC, the Baltimore Mayor's Office, and the Maryland Department of Business and Economic Development (DBED).
- Hold quarterly meetings to discuss available space, retailers seeking a Downtown location, and to update demographic information.
- Coordinate marketing efforts including publication advertisements, press releases, and attendance at ICSC conferences.
- Coordinate visits with prospective tenants/brokers that include tours and informational sessions.
- Review incentives offered at the State, City and Downtown level (see further detail in section below).

### Retail Clustering

Retailers prefer to cluster together to better capture a larger audience of shoppers. Many successful cities have dedicated shopping districts within their downtown areas. Baltimore must identify and promote areas where retailers can co-locate and cluster together in large numbers. Specifically, it should:

Identify streets, and blocks within streets, where retailers can co-locate to create a critical mass. Foster connectivity between existing and future locations.

- Market clusters of retailers, utilizing GIS mapping and demographics.
- Include other existing retailers in that area, as well as vacant locations and those in development.

(A comprehensive list of Downtown neighborhoods, including current and potential clustering options, is explored in greater detail below.)

Work with developers and building owners within these nodes to create improved and contiguous retail opportunities.

- Where holes exist in the retail flow, encourage the building owner to renovate or create space and recruit potential retailers.
- If the building owner neglects its property or violates City codes, encourage BDC to assemble large parcels where prospective developers already are in place; require ground floor retail as part of the development program.
- Where possible, encourage multi-building purchases under the control of one developer to create a thematic, non-conflicting cluster of retail possibilities.
- Review ways to discourage non-retail uses on ground floors.

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Create GIS system (within neighborhood GIS mapping referenced above) of vacant retail, as well as retail under construction and in planning.

- On an ongoing basis, work with developers, building owners, and brokers to collect all retail information, including floor plans, photos, terms, timeframes, and contact information.
- Highlight the program on Downtown Partnership and agency websites, and market it to outside sources.

Partner with CoStar on retail inventory to reach more prospective retailers.

- Highlight Downtown properties regularly.
- Host retail inventory on Downtown Partnership website with link to BDC and CoStar.
- Work with brokers to utilize and update listing opportunities for all retail locations in Downtown.

Continue working with groups such as Historic Charles Street Association, Market Center Merchants Association, WestSide Renaissance, and Main Streets to strengthen and better coordinate efforts.

Existing and future clustering areas could include:

- **Inner Harbor** – long the center of retail and tourist activity, the area continues to thrive by reinventing itself. The Inner Harbor currently has the greatest capacity to attract national and high-end retailers due to its easy access and popularity with residents, employees, and visitors. The majority of Downtown's national retail is currently located along the Inner Harbor. Additional retail should be considered, including vending/kiosks, to augment the pedestrian and retail experience around the Harbor to Fells Point. Both 10 Inner Harbor (the former McCormick site) and 300 E. Pratt Street are creating continuous retail opportunities both along Pratt Street and the respective side streets. For most properties in the Inner Harbor retail should be considered on both the water and street sides to improve the aesthetics and pedestrian experience.
  - **Pratt Street** – currently, the area has predominantly national retailers with some independents (mostly food). There are opportunities at existing buildings where retail could/should be added. Maximizing ground-level spaces for retail is critical to creating pedestrian flow and improving the connectivity of existing, scattered retail.

Retail additions, as well as placemaking, will be explored as part of the Pratt Street Design process. Work with the selected design team and stakeholders group should be ongoing throughout the process. Marketing materials (e.g. maps, renderings, and vision) should be used heavily in

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recruitment efforts as this is a very attractive area, demographically, for most national retailers.

- **Harbor East** – is a mix of high-end national retailers, smaller national boutiques, and unique independent retailers. The area connects the Harbor area to Fells Point creating a continuous shopping/pedestrian experience. Ongoing recruitment efforts should focus on the creation of a neighborhood through a variety of retail options, including further service retail. The build-out of current plans is critical to momentum in this area.
- **City Center** – historically the region’s leading business district, City Center is dotted mostly with food shops and accessory services, such as dry cleaners and drug stores. This is changing due to an influx of new residents over the past few years. Existing retailers are extending their hours while new retailers are moving in to serve this fast-growing base of customers. The new Superfresh at Charles and Saratoga Streets will serve as a key anchor to attract new retailers in this area. Space will need to continue to be renovated to meet more retailers’ needs. Where buildings are converted to residential or hotel uses, retail space should be incorporated into the building, particularly at key corner locations.
  - **Center, Charles, and Hopkins Plazas** – located along the Charles Street corridor, the plazas will function as a linear series of parks and retail enclaves. All three plazas will be renovated by the end of 2007. Fully leasing the retail space at Charles Plaza, anchored by the Superfresh, will do much to connect City Center with Mount Vernon. Center Plaza can perform well as a destination retail location with predominantly food offerings, a dry cleaners, and health club – all of which appeal to office workers and nearby residents. As the site of the former Mechanic Theatre is renovated and reoccupied, attention should be directed to the inclusion of Hopkins Plaza as an asset to the new retailers, particularly for outdoor dining.
  - **Power Plant Live** – is almost exclusively a food and entertainment venue for locally- and nationally-owned businesses. There is room for additional food/entertainment/retail as new developments are built. When existing buildings experience turnover, close attention should be paid to recruiting viable restaurant options. More effort should be placed on attracting business lunch customers, as well as tourists, to augment the current customer base of mostly evening and weekend attendance.

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- **Charles Street** – is characterized by predominantly independent uses including food and boutique, with additional retail opportunities in the southern City Center blocks. Charles Street can become a connector between the Inner Harbor, City Center, Mount Vernon, and Westside neighborhoods. Continued placemaking efforts by the Historic Charles Street Association should be supported and encouraged. The Mechanic site is critical as a location for large scale anchor tenants around which additional retailers will want to locate.
  
- **Mount Vernon** – has mostly independent uses in smaller historic buildings and is anchored by cultural institutions. Additional work is necessary to convert older buildings into usable retail space. Currently, side streets offer clusters of unique retail experiences and attention should be given to highlighting these areas, as well as creating connections to existing retail locations such as Antique Row and along Charles Street. Developments in the northern portion of the neighborhood, such as State Center and UB Bolton Yards, must include large retail floorplates, including opportunities for grocery stores and national retailers to capitalize on a captive audience and access from I-83, Penn Station, and Light Rail.
  
- **Westside** – has predominantly independent uses and is anchored by the Lexington Market, Hippodrome, and Centerpoint. Retail opportunities abound for small and large tenants, national and independent. Improving the existing buildings around Lexington Market is critical, as is creating connectivity to the University of Maryland Baltimore and the University of Maryland Medical Systems. Creating connections between Camden Yards and points north is imperative. Where possible, additional retail should be added to existing buildings and vacant lots, or surface parking, i.e. “filling in the gaps.” Completion of the Superblock is critical to creating a connection between City Center, Mount Vernon, and the Westside. Larger retail floorplates should be considered for the buildings in order to create an opportunity for mid-level national retailers. Smaller side streets such as Saratoga and Park, currently dominated by independent retailers, should be the focus of an outreach for signage and façade improvements. While not displacing current tenants, Lexington Market should upgrade offerings as existing tenants’ leases expire.

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- **Station North** – some small, independent retail is present. Designated as an Arts & Entertainment District, the area is anchored by the Charles Theater and Penn Station. The redevelopment of the Chesapeake Restaurant site is imperative to adding retail to this area, as is redevelopment of the Railway Express building and the Amtrak surface lots. The A&E District advantages should be marketed more heavily and work should be ongoing with owners and developers of large floorplate buildings to retrofit them for retail. Smaller buildings should work on adding art galleries, small live music venues and accessory retail (coffee shops, wine bars, etc.). Stores serving artists' needs should also be considered for recruitment. More attention should be paid to making the intersection at Charles Street and North Avenue a primary retail and entertainment destination at the crossroads of the City.

## Retail Building Program

The majority of existing Downtown buildings do not meet retailers' standard models in terms of square footage, frontage, and other associated requirements. Baltimore must find space that meets retailer models or work creatively with retailers to help them adapt their models to unique urban environments. Specifically, Baltimore should:

Work with developers to create larger retail floor plates in new developments and renovations.

- Continue participation with BDC and City Department of Planning, including the Urban Design and Architecture Review Panel (UDARP), to support first floor retail as part of Downtown developments.
  - Assess the development of stronger code and design criteria for retail development.
  - Review setback regulations for new construction.
- Encourage multi-building purchases in order to combine 1<sup>st</sup> floor spaces for one retail tenant.
- Support the hiring of a retail architect from the start of a project's planning phase.
- Promote limiting lobby and entrance space in mixed-use buildings.
- Discourage blank walls and garage entrances near major intersections.

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Endorse two-story stores where the location is right, but the building is logistically difficult and multi-building purchase is not possible.

- Identify potential two-story store sites.
- Work with architects to draw basic concept plans and development costs.
- Review and evaluate developer financial proformas and match with potential alternate funding sources, such as BDC, the Maryland Department of Housing and Community Development (DHCD), and Baltimore Community Funding.
- Market these locations to potential retailers.

Work with for-sale buildings to create whole block development (e.g. St. James properties, 400 block of N. Howard, Water/Light Street properties).

- Maintain an updated list of for-sale and RFP development opportunities.
- Make the list available on Downtown Partnership's website.
- Distribute updates to retail-friendly and proactive developers and building owners.

Expand Downtown Partnership's Façade Improvement Program (FIP).

- Extend boundaries of the existing program.
- Market the program more effectively and to a broader audience, including building owners, developers, and brokers.
- Offer further architectural assistance.
- Hire an on-call architect to design improvements with approval from BDC & The Partnership.
- Seek to offer FIP grants to a row or block of building owners/tenants for maximum aesthetic impact.
- Select a high-visibility area to perform this sample.
- Assist in increased funding of selected area.
- Publicize the results.

Energize the vision for future retail space.

- Work to improve overall architecture in any renovated or newly constructed buildings.
- Continue to participate in Department of Planning and UDARP meetings.
- Investigate the possibility of inclusion of retail design criteria in Urban Renewal Plans.

### **Authenticity & Placemaking**

When compared with the suburbs, downtowns offer the promise of a more authentic experience and provide a sense of place not found in cookie-cutter suburban malls or retail villages. In order to promote Downtown as a unique shopping experience, Baltimore must preserve and leverage its distinctive neighborhoods, markets, and architecture.

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Baltimore must demand high quality architecture by creating a symbiotic relationship between both historical and modern structures. Specific recommendations include:

### **Authenticity**

Create active (non-static or print) marketing materials that reflect Baltimore's unique neighborhoods.

- Use existing demographic information and planned GIS mapping systems for production of neighborhood marketing materials.
- Produce concise descriptions of neighborhoods with demographics, cultural attractions, attributes, and retailers. Include photos.
- Encourage developers, brokers, and CoStar to include Downtown Partnership's neighborhood marketing materials as part of the marketing for any sites within that neighborhood.
- Include vacant retail sites or sites in development within each neighborhood.
- Link to The Partnership, BDC, and CoStar websites.
- A large map of Downtown should be divided into neighborhoods and include the aforementioned information.
- Ensure that all information can be easily updated.

Encourage preservation groups to find creative uses for historic buildings.

- Connect preservation groups with proactive historic developers and retailers.

Expand marketing of Maryland Smart Codes.

- Hold seminar for economic development staff, developers, and brokers to better understand use of Smart Codes as a tool to assist incoming retailers.
- Advocate for the State to market Smart Codes more widely.

### **Placemaking**

Downtowns offer a different kind of shopping destination and maximizing this difference is key to getting shoppers to come Downtown and to keep coming back. Baltimore must consider sidewalk cafes, parks/plazas, and places to linger, (which are not dominated by automobiles), when determining where retail will thrive. Additionally, Downtown should strive for a pedestrian-friendly environment and unique experience. To do this, Baltimore should:

Improve the overall design, aesthetic, and pedestrian experience of Pratt Street. Create a grand boulevard with greater retail choices and better pedestrian aesthetics. Strengthen Pratt Street's existing amenities and create new opportunities for Downtown's "front yard."

- BDC, in conjunction with The Partnership and City's Departments of Planning and Transportation, issued a Request for Qualifications for consultant services (October 2006) to provide a comprehensive Concept Plan for the public spaces along the

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Pratt Street Boulevard corridor in Downtown – 16 blocks from Martin Luther King, Jr. Boulevard to President Street.

- The new concept plan for Pratt Street should rethink improve the use of open spaces, enhance the aesthetic and functional design of the street's usage, activities and attractions, better activate the spaces and provide more pleasant and exciting pedestrian experiences.
- The Concept Design chosen for implementation will be used to generate public and private sector support, identify necessary funding required to implement the project and provide an implementation strategy.

Support major catalyst development projects.

- Advocate for funding of a new Downtown arena with retail on all street fronts, entertainment, and housing uses.
- Assess future proposals and developments for economic impacts and potential to be a retail driver.

Increase and promote sidewalk cafes and outdoor dining.

- Create an easier permit process.
- Review the permit processes and success in outdoor dining in Boston and Philadelphia (particularly in Philadelphia's Center City).
- Evaluate existing costs of permit process to retailer.
- Create sliding scale minor privilege fee in conjunction with BDC and City's Minor Privilege Permits office.
- Encourage developers designing new space or renovating existing locations to include an area for outdoor dining. Preferably, outdoor dining space should be part of the property owner's area so as to remove the need for a minor privilege permit.
- Create landscape standards as part of outdoor dining review permit.
- Encourage the use of heat lamps to extend the outdoor dining season.

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Increase amount of outdoor displays, carts and kiosks associated with a specific retailer's location, (not individual kiosks on plazas as is discussed below).

- Review permits or legislation for outdoor displays and carts (e.g. fresh flowers).
- Provide potential funding as part of a push for existing retailers to include outdoor displays as part of their marketing and merchandising efforts.
- Choose a few retailers (preferably clustered in one area like a block of Charles, Pratt or Saratoga Streets) to support financially and help design the outdoors wares/displays.
- Market and highlight the effort.

Promote more aesthetically pleasing and relevant window displays for retailers.

- Encourage windows to be open, not cluttered, so that pedestrians can see into the store and easily recognize what is being offered.
- Hire a window display or retail consultant for those retailers who are interested in receiving advice and assistance.
- Consider expanding the consultant program to include renovation of the entire façade.
- Ensure that all aspects of the window display are directly related to the merchandising and marketing of the store.
- For window displays, begin with seasonal/holiday displays, similar to Historic Charles' Street Association's holiday theme and competition.
- Assist in funding the competition.
- Give awards for the best designed, most relevant, most improved, etc.
- Market and highlight the event.
- Review other cities' signage and window display ordinances (e.g. Scottsdale, Arizona).
- Consider incorporating retail design criteria (e.g., no paper signs in windows) into respective Urban Renewal Plans.

Endorse improved and effective signage.

- As part of FIP grant, encourage new and more attractive signage.
- Review extension of new Central Business District Urban Renewal Plan area signage regulations to all of Downtown.
- Encourage projecting (blade) signs, as well as signs which create a sense of depth.
- Expedite sign permits for retailers within Downtown.
- Formalize sign permit review process for Downtown retailers. (Signs to be reviewed by Planning, BDC and Downtown Partnership.)
- Identify sign designers and companies willing to work with Downtown retailers at an expedited or reduced rate.

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Improve parks and plazas throughout Downtown through maintenance, activities and branding. Prioritize distribution of resources to the parks and plazas based upon the potential for success, greatest impact and highest usability.

- Determine ownership and responsibility (e.g. mowing, planting and cleaning) for all parks and plazas.
- Create maintenance and planting plan and design standards, including signage, lighting, benches and trash cans, for all plazas and parks.
- Dedicate staff to landscape and maintain, as well as provide safety or serve as hosts.

Activate parks and plazas through programming, events and vending.

- Provide regular activities. Users should be able to rely on a semblance of a set schedule of events, i.e. First Thursdays.
- Create a parks programming task force to include representatives from city agencies, Downtown Partnership, BACVA, building managers, community groups and employers.
- Identify activities, funding and scheduling.
- Promote and advertise all activities.

Create a brand for Downtown parks and plazas.

- By consistently designing, maintaining and programming the parks and plazas, users will begin to identify that they are in a public green/open space.
- Utilize existing marketing/advertising agencies and associations to create taglines and campaign.

Seek new opportunities for areas to function as green or public spaces.

- Potential locations include:
  - President Street
  - The Fallsway
  - Along the Jones Falls from Lombard Street south to the Inner Harbor
  - Liberty Park, (at Liberty Street and Park Avenue)
  - St. Paul Plaza
  - Areas on the Westside
  - Others to be determined

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Implement a comprehensive vending and kiosk program for Downtown.

- Work with City's Board of Hucksters, Hawkers and Peddlers, as well as existing vendors.
- Select locations – parks and plazas, as well as intersections with larger sidewalks.
- Focus on areas where vending and kiosks will not only pull employees out of buildings, but also encourage pedestrians to walk up streets that have additional retail.
- Encourage existing retailers to open a second location, perhaps as a preliminary test-run for expansion.
- Support small and minority businesses (through Small Business Resource Center and Bridging the Gap) in opening vending or kiosk locations.
- Ensure that vending, particularly in parks and plazas, is consistent in both days and times.
- Recruit and schedule vending for parks and plazas early in each season.
- Provide clear demographics as part of a vending and kiosk recruitment package.
- Review health permit and city vending regulations carefully and provide any potential participants upon request for application.

Improve Downtown streetscapes, landscaping and greening efforts.

- Continue reconstruction of all Downtown streetscapes through City and Downtown Partnership.
- Urge a consistency in the design and materials for all Downtown.
- Expand streetscapes capital renovations program and speed of the projects.
- Identify funding sources to maintain and repair streetscapes, including power washing sidewalks.
- Increase the amount of street trees throughout Downtown.
- Improve the maintenance and care of street trees.
- Advocate for pedestrian-style lights on every block Downtown.

Encourage building owners to improve the exteriors of buildings and sidewalks.

- Continue code enforcement program for the worst offenders.
- Promote power washing of sidewalks and buildings.
- Continue The Partnership's Best Kept Property Awards and actively publicize.

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Expand the “greening” of individual buildings.

- Create a Downtown “greening” packet made available to building owners, tenants and developers.
- Utilize a landscape architect to create a variety of planting options including trees in large planters, flowers pots, small gardens and water features.
- Select a few buildings (preferably near one another geographically) that will implement “greening” plans created by the landscape architect.
- Identify a nursery or wholesaler to assist in supplying the planters or plant material, top soil, etc.
- Upon completion of the plantings, use these buildings as examples, with before and after photos, in the “greening” packet.
- Market and highlight the program.
- If necessary, identify funding for some portion of the program.

Increase The Partnership’s planters program.

- Identify the best locations to make a recognizable impression with the additional plantings.
- Market and promote the program.

Expand public art throughout Downtown.

- Increase the number of sculptures both on public and private property.
- Create more interactive art, e.g. the fountains in Millenium Park in Chicago.
- Expand the existing program of painting murals on vacant buildings’ 1<sup>st</sup> floor windows.
- Continue to support the existing Art Exposure program in 1<sup>st</sup> floor storefronts.
- Encourage further use of vacant 1<sup>st</sup> floor spaces as art galleries or artists’ work spaces (e.g. Current Art Gallery on S. Calvert Street).
  - Identify additional City owned properties which are currently in RFP or developer awarded status.
  - Seek out additional opportunities with private developers and property owners.

Include street entertainers throughout Downtown.

- Licensed street entertainers enliven streets in specific locations Downtown, thus entertaining pedestrians, creating a sense of ease and encouraging further exploration of Downtown.
- Licensed street entertainers should be encouraged to participate frequently and at key corners for highest visibility.
- This program should be expanded to encourage street entertainers around all retail areas Downtown.

# RETAIL ASSESSMENT AND STRATEGY

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DOWNTOWN BALTIMORE : *Outlook 2012*

## **Transit & Parking**

Easy access matters to retailers when making location decisions, however top-tier retail cities do not put a priority on providing easy parking. As with these top tier cities, shopping districts in Baltimore should be easily accessible to residential areas where shoppers could easily walk, or be developed around transportation links. Whether shoppers arrive on foot, or by car or MTA, the retail district should offer a positive pedestrian experience, making it easy and enjoyable to stroll between shops and restaurants.

Elected and economic development officials, as well as residents and businesses must all continue to advocate for improved public transit.

- Coordinate with MTA to review and assess bus lines, as well as bus stops.
- Coordinate with MTA on design and construction of Red Line; identify any effect the recommendations for type and route may have on Downtown residential, retail, and office uses.
- Push for Downtown circulator, either free or inexpensive to riders.
- Encourage the continued study of a trolley in the Charles Street Corridor to connect the Inner Harbor and Downtown with the Mt. Vernon Cultural Institutions, Penn Station, and Johns Hopkins University.

Continue to support the housing initiative, realizing that building and occupying the new developments is not the end result. Rather, residents must become a more important focus of constituent services and outreach events.

- Expand activities and marketing efforts to Downtown residents.
- Encourage elected officials to meet regularly with Downtown residents.

Encourage developers and brokers to understand the parking for their respective buildings as pertains to retail.

- Review 3-block radius demographics for retail locations, thus reinforcing the pedestrian shopper possibilities for that location to the retailer.
- Encourage a variety of parking options.
- Facilitate, between developers/brokers/retailers and parking garage owners, the creation of parking validation.
- Assess existing valet parking and future valet parking options.
- Decide on most effective regulations for valet parking, including locations best suited for valet.

# RETAIL ASSESSMENT AND STRATEGY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Expand work with Baltimore City Parking Authority and private garages for special parking rates geared toward shoppers and diners.

- Continue special holiday parking rates and expand number of businesses supporting the payment of meters on behalf of customers, as well as garages offering reduced rates.
- Identify new days, times and events when reduced parking rates will assist in eliminating the use of parking cost as a reason for not coming Downtown to shop or dine.

Work with Baltimore City Parking Authority to improve valet parking.

- Review existing valet parking regulations.
- Research other cities' valet parking regulations and assess for suggested inclusion, (e.g. X amount of percentage of restaurant sales required in order to have valet parking).
- Evaluate existing valet parking locations and operations.
- Identify potential locations for multi-tenant/shared valet parking.

Assess the expansion of on-street parking with City Department of Transportation and Baltimore City Parking Authority.

Determine further streets for conversion to two-way with City Department of Transportation and Baltimore City Parking Authority.

### Incentives

As the *2005 Retail Assessment* shows, retail incentives by themselves are not effective in recruiting and retaining major retailers. Rather, there is a range of factors that attract and sustain retailers. Instead of looking for a magic bullet incentive that will serve as the linchpin of retail recruitment, Baltimore must directly market its strong demographics and other assets to retailers, and it must work with property developers that have the proven ability to attract desired retail to their projects. Specifically, Baltimore should:

Improve the knowledge of and expand the variety and dollar amount of financial incentives available to retailers. Incentives to be pursued should include a package of grants, low-interest rate loans and matching dollars available to retailers, rather than tax increment financing (TIF) directly for retail.

- Update and expand the existing Baltimore Main Streets' "Resources Available for Small Business in Baltimore City; Financial, Technical Assistance, and Tax Incentives."
- Hold seminars for economic development officials, retailers and brokers on the existing programs offered by the state, city and private institutions.
- Market the existing programs, such as:
  - Enterprise Zone

# RETAIL ASSESSMENT AND STRATEGY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

- Maryland Capital Access Program
- Neighborhood Businessworks Loan Program
- Strategic Assistance Consulting Fund
- Baltimore Community Funding

Execute a comprehensive review of the retail permitting process, including health inspections, signage, etc.

- Create a retail permitting booklet made available through Baltimore City's Permits Office, Planning Department, BDC and DPOB.
- Research cost reductions for various retail permits for retailers within Downtown area.
- Apply a sliding scale for signage fees and minor privilege permits for new retailers.
- Expedite the permitting process for retailers within Downtown area.

Consider PILOTs and TIFs, in accordance with established City policy, only when development of the project would otherwise be cost prohibitive to include retail. Offer these incentives to the developer contingent upon certain pass-throughs, e.g. tenant buildout or reductions in cost, to the prospective retailer.

### Site Specific Recommendations

As detailed previously, retailers prefer to cluster together to better attract large numbers of shoppers. High density, mixed-use developments with substantial residential and retail components should be encouraged for all new development and redevelopment Downtown. Sites Downtown which should be considered imperative for retail attraction include:

**10 Inner Harbor (Inner Harbor)** – one of the last remaining open development sites along the Inner Harbor, the location is essential to connecting Federal Hill/South Baltimore with City Center. The Charles Street frontage should be considered for neighborhood retail, such as a much-needed grocery store. Additional major retail should be addressed on Conway and Light Streets, including restaurants and other amenities for the residents of the development, as well as pedestrians.

**300 E. Pratt Street (Inner Harbor)** – the site's premiere location on Pratt Street begs for additional retail opportunities. The site is adjacent to the Gallery and across from Harborplace, both of which are established retail destinations in Downtown. As part of the development program, retail along both Pratt and Lombard Streets should be considered. Large floorplates and potentially multi-level retail should be part of the retail mix also, so as to create a consistent retail flow along Pratt Street.

**400 Block of W. Baltimore Street (Westside)** – the 400 block is the pivotal connector between the University of Maryland, Baltimore and the remainder of Downtown.

# RETAIL ASSESSMENT AND STRATEGY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Currently, the area is an inhibitor for pedestrians' further exploration eastward, including the Abell Building and Centerpoint where retail exists or is planned. The 400 block should be assembled in order to provide a consistent flow of retail, including restaurants, to capitalize on the existing student and employee base and visitors to the Hippodrome. The employees, students and visitors at the campus are in need of further retail options and a level of comfort in leaving the campus.

**Abell Building (Westside)** – the renovation of the building to include residential and retail is pivotal for the completion of the intersection. Retail in this building should be unique and complementary to the existence of the Hippodrome, as well as the increasing residential population. A high-end restaurant ought to be pursued for the corner so as to build upon the audiences at the Hippodrome.

**Amtrak surface lots (Station North)** – the surface lots directly north of Penn Station currently provide a very visible barrier to the pedestrian flow to and from the north. The site should include first floor retail, congruent with the changing neighborhood's needs, as well as the main anchor, Penn Station. The lot is of sufficient size to incorporate a large floorplate for a mid-level national retailer to serve the growing residential base, as well as the existing neighborhood to the south.

**Center Plaza (City Center)** – the plaza's renovation is a marked improvement to the core of Downtown and will serve as connector between City Center and Westside. The retail locations facing the plaza should be filled predominantly with restaurants capitalizing on the large green space. Outside dining should be highly encouraged for these tenants. Signage will need to be carefully considered. The plaza, with the right tenant mix, will be a destination retail location for employees, hotel guests and the increasing number of residents.

**Chesapeake Restaurant Site (Station North)** – the renovation and reuse of the site, as well as the surrounding block is pivotal to the recreation of the emerging area. Anchored by the Charles Theatre and a few stable restaurants, there is a need for further dining and entertainment options, as well as retail serving the increasing artist population.

**Cityscape (City Center)** – the completion of the project is imperative to drawing pedestrians north along Calvert Street. Currently, the block is an impediment to connecting City Center to the Inner Harbor. Development of Cityscape should include retail along the length of the Calvert Street side, as well as addressing the Water Street corridor, particularly where it faces the existing Water Street retail, to create a constant flow and neighborhood feel.

# RETAIL ASSESSMENT AND STRATEGY

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DOWNTOWN BALTIMORE : *Outlook 2012*

**Harbor East & Harbor Point (Inner Harbor)** – the ongoing development of the neighborhood with its inclusive retail allows for continuity in the pedestrian experience from Pratt Street to Fells Point. The Four Seasons condominium project is to include high-end national retailers along the waterfront. The remaining developments include varying-sized floorplates attractive to both national and independent retailers of all levels. Harbor Point plans should include destination retail and should maximize waterfront views through outdoor dining and the creation of open spaces which tie into the Promenade.

**Hotel Row, Baltimore/Light/Redwood Streets corridor (City Center)** – the area is currently transitioning from Class B office to numerous national and boutique-style hotels. Sites should include first floor restaurant and retail space as much as possible, particularly at corner locations. The developments have the opportunity to create a transition between two areas of City Center with the addition of more life on the street, usable buildings and retail options. One Light Street must be developed and should include retail along Baltimore, Light and Redwood streets as part of its program. The retail space at the Hampton Inn should be marketed and a new and positive use for the Redwood Trust be demanded.

**Mechanic Site (City Center)** – the site is one of the few where large floorplates can be built in the Downtown core. This key intersection, with its proximity to public transit is an ideal location for a national retail anchor. The addition of such a retailer would in turn attract other national retail tenants in other adjacent buildings. The site should also seek to incorporate and activate Hopkins Plaza as part of its program, offering outdoor dining and display areas.

**Oldtown Mall (East Baltimore)** – the size of the site provides a unique opportunity for large floorplates ideal for national retail anchor tenants, including a grocery store. Oldtown's proximity to Downtown and Johns Hopkins East Baltimore Medical Campus and presence along Route 40, a key commuter route, allows it to draw from a large customer base. The site should be expanded and explored as a possible urban retail village.

**State Center (Mount Vernon)** – the transit-oriented development has the opportunity for large floorplates attractive to national retail anchor tenants. The site has access not only by light rail, metro and bus, but also I-83, and lies adjacent to well-established residential areas of multi-leveled incomes. The existing employment base also bodes well for retail needs. Large scale retail should be heavily recruited, as well as restaurants to capitalize on the daytime employees, cultural visitors and residents.

# RETAIL ASSESSMENT AND STRATEGY

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DOWNTOWN BALTIMORE : *Outlook 2012*

**Superblock (Westside)** – the redevelopment of this area is imperative to connecting Westside with City Center and Mount Vernon. The development program must include office and residential space which will provide customers for the first floor retailers. Existing retail plans should be expanded to create larger floorplates desired by mid-level national retailers. Restaurant options should also be considered for this development. Along Lexington Street, outside dining and displays should be strongly encouraged due to the wide sidewalks.

**UB Bolton Yards (Mount Vernon)** – the site is ideally situated to capitalize on the existing student base, established neighborhoods and varied transit options, including I-83, Penn Station and Light Rail. Large retail floorplates should be included in the development and recruitment efforts should be focused on grocery stores, as well as anchor tenant retail and restaurants.