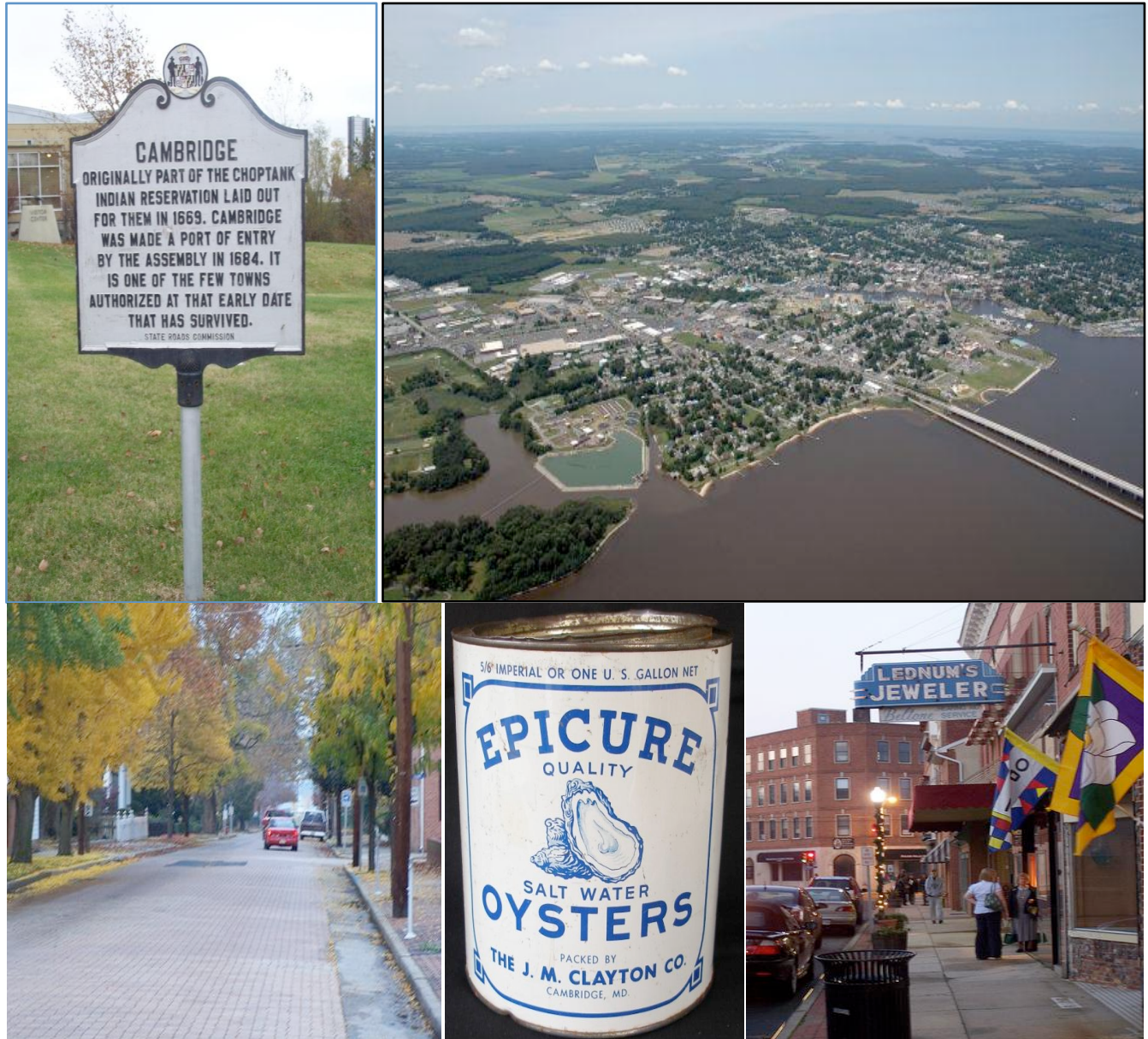


A COMMERCIAL DISTRICT REVITALIZATION FRAMEWORK PLAN FOR DOWNTOWN CAMBRIDGE, MARYLAND

TO SUPPORT THE DEVELOPMENT OF DOWNTOWN CAMBRIDGE
AS THE CENTER FOR RETAIL ENTREPRENEURSHIP ON THE EASTERN SHORE



PERFORMED FOR AND UNDER THE DIRECTION OF THE
CAMBRIDGE MAIN STREET PROGRAM

SUBMITTED: FEBRUARY, 2009



CLIENT:

CAMBRIDGE MAIN STREET

450 RACE STREET, SUITE 206
CAMBRIDGE, MARYLAND 21613
(410)-228-0200
OFFICE@CAMBRIDGEMAINSTREET.COM
[HTTP://WWW.CAMBRIDGEMAINSTREET.COM](http://www.cambridgemainstreet.com)

FUNDING:

THIS PROJECT WAS SUPPORTED BY A GRANT AWARDED TO THE CITY OF CAMBRIDGE BY THE MARYLAND DEPARTMENT OF HOUSING & COMMUNITY DEVELOPMENT'S COMMUNITY LEGACY PROGRAM.

STUDY PRODUCED BY:

ECONOMIC DEVELOPMENT VISIONS

2518 TUNLAW ROAD N.W.
SUITE 101
WASHINGTON, DC 20007
(202)-248-9715 ▪ (480)-275-3545 (FAX) ▪ CHUCK@ECONOMICVISIONS.COM
[HTTP://WWW.ECONOMICVISIONS.COM](http://www.economicvisions.com)

CHUCK D'APRIX, PRINCIPAL
RICHARD LAYMAN, CONSULTING ASSOCIATE

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SCOPE OF WORK/DESTINATION PLANNING FOR DOWNTOWN CAMBRIDGE

In 2006, a Regional/Urban Design Assistance Team organized by the American Institute of Architects conducted an opportunity analysis for Cambridge, and the recommendations included conducting a more detailed market study and exploration of business/entrepreneurship development opportunities within the core of the city.

In 2008, the Cambridge Main Street program received a grant from the State of Maryland to conduct an entrepreneurship development-oriented market study. Economic Development Visions and its affiliated company The Downtown Entrepreneurship Project, a Washington-based commercial district revitalization, destination development, and entrepreneurship development consulting group, was retained for this project.

This document comprises the market and planning study portion of the Retail Entrepreneurship Development Program for the City of Cambridge Main Street Program.

Economic Development Visions advocates that all communities plan and market their commercial districts as "destinations."

Regardless of customer origin, whether the prospect/customer is an office worker based Downtown, a resident of nearby neighborhoods, from elsewhere in the city or region, or staying overnight for a visit of one or more days, everyone seeks high quality experiences. Regardless of where customers originate, *we are all destination managers*, and we need to be focused on maximizing the success of their visits. To structure and organize destination development planning for a community, we recommend using tourism development and management principles and practices, combined with the Main Street Approach to commercial district revitalization, and other best practices economic revitalization approaches.

Downtown Cambridge, along with its adjacent neighborhoods and the Choptank River waterfront, possesses many assets and opportunities. These opportunities must be leveraged and layered to best achieve success and the highest possible return on both public and private investment.

A City-specific destination (economic) development plan must recognize that Cambridge's greatest economic opportunities are in attracting a greater proportion of the tourists already visiting or traveling through Dorchester County and the Eastern Shore, extending the time they spend in the community, particularly the Downtown core and waterfront, and increasing the amount of money they spend within the city. This document, coupled with the R/UDAT study, should serve as points of departure for a city-wide economic development strategic plan.

The study team has identified a number of issues that influence how residents and visitors are inclined to perceive Downtown Cambridge. Suggested responses are identified and outlined as recommendations below, in various sections as appropriate.

A FOCUSED EFFORT TO DEVELOP DOWNTOWN CAMBRIDGE AS THE EASTERN SHORE'S PREMIER LOCATION FOR RETAIL ENTREPRENEURSHIP

One of the biggest problems faced by traditional commercial district revitalization efforts is the lack of a list of "pre-qualified" entrepreneurs, people able to open a retail or restaurant business almost immediately, in response to newly vacant retail spaces. By definition, independent entrepreneurs are "independent" and not easily identified—there is no master list of people interested in opening a retail store! In contrast, directories of chain retail companies are published and retail shopping center managers have access to a well developed communications system that alerts commercial leasing agents, store location specialists, and real estate departments to opportunities.

Cambridge is fortunate to have entities in the region committed to retail entrepreneurship including the Main Street program, the Maple Street program, the City of Cambridge Economic Development Department, the Eastern Shore Entrepreneurship Center, Chesapeake College, the Dorchester County Economic Development Department, and the Eastern regional office of the Maryland Small Business Development Center. (Other entrepreneurship development priorities, such as technology, agriculture, maritime, and other industries, should be directed to more appropriate locations other than the Downtown.)

Within Dorchester County and the City of Cambridge, Downtown should be positioned as the number one place to find or start independent, unique, and entrepreneurial retail, restaurant, and support businesses. This program will include a proactive and vigorous outreach effort within the many diverse neighborhoods in Cambridge when recruiting entrepreneurs.

Recommendation ONE: Cambridge Main Street, in association with local and regional partners, should create an entrepreneurship program specifically focused on the development of retail and restaurant businesses to be located Downtown. (This program can be extended to include other priority areas within the City.)

Offering this kind of focused program Downtown will brand Downtown Cambridge as the number one "top of mind" location for retail entrepreneurialism in the region, will increase the demand for retail space, and increase the likelihood that business startups actually succeed. Current support programs can be repositioned within this initiative. Moreover, Downtown Cambridge should be marketed as a "CENTER OF ENTREPRENEURSHIP" to potential downtown entrepreneurs. This, coupled with the retail attraction approach (and other recommendations) outlined below, will lead to the development of Cambridge as the premier traditional retail shopping district on the Eastern Shore.

Economic Development Visions, as part of its contract with Cambridge Main Street, has already begun planning in earnest a full-scale entrepreneurship development effort. All relevant County and City agencies will be engaged in this effort which will include a vigorous marketing and outreach program to potential entrepreneurs. The details of the suggested program will be outlined in a separate report which will be prepared for the second phase of this project; however, it is essential that entrepreneurship remain a key component in the Main Street revitalization effort in Cambridge.

The entrepreneurship development effort as planned will have several components that reach beyond just marketing. It will include the establishment of a formal committee, a screening and training program, a business funding mechanism, and ongoing support services for entrepreneurs. Rather than develop a new entrepreneurship program from scratch, Economic Development Visions recommends that the Cambridge and Dorchester County stakeholder organizations active in entrepreneurship development activities work together to deliver these services in a complementary and coordinated fashion. In short, we do not propose to "reinvent the wheel," but rather

identify the strengths of the many entities engaged in entrepreneurship and engage them in a manner that best serves the needs of Cambridge Main Street and the downtown.

By offering a regular series of programs on topics relevant to creating and operating retail stores, the Main Street program will begin identifying potential entrepreneurs and have the means to be proactive about filling gaps in the retail mix, being able to respond to business and property opportunities as they develop by having already prepared entrepreneurs able to launch successful retail businesses.

This training program would include sessions on merchandising, product mix, interior design and organization, identity systems, and business operations. It would provide hyper-focused assistance to entrepreneurs on business plan development as the process of creating a business plan is often seen as overwhelming. It would also provide help entrepreneurs become credit-ready and able to assist them with introductions to bankers and other sources of funding in advance of opening businesses.

By pairing this with the development of a wraparound package of technical assistance and incentives to address gaps and barriers in the way of successful business startups (financing, space acquisition, build out, signage, employee development, permitting and licensing), the risk inherent in business startups should be reduced, and failure minimized.

The development of a wraparound retail entrepreneurship program could include a retail incubator program and/or space as a way to grow new businesses, test concepts, and add retail variety to Downtown Cambridge.

CURRENT CONDITIONS

Cambridge is located within the Chesapeake Bay region on Maryland's Eastern Shore, in Dorchester County. It is well placed on US Route 50, which is the main route between the Washington-Baltimore region and popular Eastern Shore destinations such as Ocean City in Maryland, and Rehobeth Beach and Lewes in Delaware. Public transit options to Cambridge are limited, although a community transit system provides service within a number of communities throughout the Eastern Shore. This means that most trips to, from, and within the region are made by automobile.



Cambridge is well-located in the Mid-Atlantic, within 225 miles to New York City on the north, 190 miles to Richmond and 170 miles to Norfolk (via the Eastern Shore) on the south.

John Wennersten, in *Maryland's Eastern Shore: A Journey in Time and Place*, describes Dorchester County in one word—"wild"—referring to how the County is defined by nature, the land, and the water. Cambridge dates to the 1680s, and its history is dominated by water due to its placement on the east bank of the very wide Choptank River. Fishing, crabbing, oystering, and related maritime and manufacturing businesses developed around and beyond these activities, including canning of water-based and land-based food products. The river (and later the railroads) provided the means for relatively convenient transportation around the region into the early part of the 20th century, until both water and rail were supplanted by the development of automobiles and a widespread road network.

The County has the most waterfront coastline of any county on the Eastern Shore, and much remains in its natural condition. The Choptank River is wide and navigable and Dorchester County is particularly attractive because of its recreational assets which center around water and nature (boating, fishing, hunting, bird watching, etc.). Cambridge's port is the second deepest in Maryland, after Baltimore. However, with the rise of national food processing and distribution firms, industry centered around food production has declined significantly although a number of seafood processing operations remain located in Cambridge, and are a quality source of employment opportunities.

Cambridge contains about one-third of the population of Dorchester County, with 11,000+ residents out of a total of around 30,000. As the primary commercial and civic center of the county, Downtown Cambridge possesses many civic and cultural assets including the City Hall, County Courthouse and Administration building, a post office, the Richardson Maritime Museum, Dorchester Center of the Arts, and the Harriet Tubman Museum and Educational Center. Downtown is just a few blocks from the Waterfront, where Sailwinds Park and the Heart of Chesapeake Country Heritage Area Visitors Center is located. High Street, which connects the Waterfront and the Cambridge Municipal Yacht Basin to Downtown, is a unique street constructed of brick pavers and is lined with high quality Victorian architecture.

The Downtown commercial district is managed by a state-designated Main Street program (Cambridge Main Street), with a companion state-designated Arts & Entertainment District. Most of Dorchester County and all of Cambridge lies within the Heart of Chesapeake Country Heritage Area, which has been designated as a state resource by the Maryland State Heritage Areas Authority. This program is managed by the Dorchester County tourism department. In 2002, the Hyatt Regency Chesapeake Bay Resort opened with 400 rooms, a conference center, marina, spa, and golf course, strengthening the position of the county as a tourist destination, by adding higher end attractions and properties.

Cambridge is easily reachable by road within the Mid-Atlantic region—about 85 miles from both Washington, DC and Baltimore, 60 miles from Maryland’s Capital, Annapolis, 110 miles from Wilmington, Delaware, 140 miles from Philadelphia, and 65 miles to Ocean City, Maryland’s #1 tourist destination.

Guiding principles for development in Cambridge (from the R/UDAT study)

1. Conserve Community Character
 2. Leverage Competitive Advantages
 3. Strengthen Leadership and Cooperation
 4. Value the Heart of Cambridge
 5. Encourage Strategic Mixed-Use Infill and Developments
 6. Define and Create Public Domain
 7. Strategically Locate and Plan Attractions and Events
 8. Create Day/Night Vibrancy
 9. Connect the Fabric: Linking the Key Places That Define Cambridge
 10. Provide Equal Access to Economic Opportunities
 11. Preserve and Create Positive Activities for Existing and Future Residents
 12. Promote Sustainable Communities Within Cambridge
-

Via the Choptank River, and having a number of marinas where boats can be berthed, Cambridge is easily reachable from the Chesapeake Bay. Within the region, Cambridge competes with Easton, a community with an art museum, a multi-purpose theater and strong retail district, and St. Michaels, a town with a strong boating and maritime orientation, both in Talbot County; Salisbury, a big box retail destination in Wicomico County; and Chestertown, in Kent County. Delaware-based retail poses competition for large ticket retail items (furniture, appliances, automobiles, etc.), because that state doesn’t charge sales tax on retail purchases. Additionally, a Prime Retail Outlet shopping center is located on Rte. 50 in nearby Queenstown in Queen Anne’s County. This shopping center offers more than 60 in-demand well-known branded retail outlets including Gap, J. Crew, Polo

Ralph Lauren, Nautica, and Nike. Also, a small big box retail center including a Target is located at the Waterside Center outside of Downtown Easton on Route 322.

In addition to the R/UDAT study (Regional/Urban Design Assistance Team services are provided under the auspices of the American Institute of Architects), the Economic Development Visions team reviewed the management plan for the Heart of Chesapeake Country Heritage Area, tourism reports from the State of Maryland Department of Tourism, the current strategic plan for the Chesapeake Bay Gateways Network, the Chesapeake Marshlands National Wildlife Refuge Complex Comprehensive Conservation Plan (2006), a quality of life and retail study of the Pine Street neighborhood conducted by Neighborhood for a Better Cambridge and the Cambridge Maple Street Committee, and notes from a waterfront charrette conducted by the City of Cambridge Department of Community and Economic Development. Separately from this study, the City of Cambridge is currently updating its Comprehensive Land Use Plan. The team has reviewed some of the documents prepared for the update, as well as the 1998 version of the Comprehensive Plan.

The study team made site visits to businesses and cultural assets within Cambridge, conducted interviews, made brief comparison visits to St. Michaels, Easton, and Chestertown, and contracted for the collection of intercept and telephone surveys, which were subsequently reviewed and incorporated into the report.

The guiding principles for development in Cambridge as outlined in the R/UDAT study have been used to guide the analysis and recommendations within this report, combined with the destination development planning approach employed by the study team.



Downtown Cambridge has one of the most attractive and intact core of historic buildings on the Eastern Shore, although underutilization of buildings is high and many buildings are vacant.

MARKET STUDY SUMMARY

A retail market analysis of Downtown Cambridge was conducted by study team member Dr. Joseph Cater, of Annapolis-based Market-Economics, a firm frequently engaged by Economic Development Visions and The Downtown Entrepreneurship Project. The full study is contained in Appendix B of this report and is summarized in this section.

HOUSEHOLD AND POPULATION GROWTH MAIN STREET RETAIL AREA AND CITY OF CAMBRIDGE 1980 - 2007

Population Growth		Main Street Retail Area		City of Cambridge		Dorchester County	
	Number	Annual % of Growth	% of City	Number	Annual % of Growth	Number	Annual % of Growth
1980	761		6.5%	11,703		30,623	
1990	730	-4.14%	6.3%	11,514	-1.61%	30,236	-1.26%
2000	673	-7.73%	6.2%	10,911	-5.24%	30,674	1.45%
2007*	708	5.18%	6.0%	11,796	8.11%	31,848	3.83%
1980-1990	-31	-4.14%	16.68%	-189	-1.61%		
1990-2000	-57	-7.73%	9.36%	-603	-5.24%		
2000-2007	35	5.18%	3.94%	885	8.11%		
Household Growth		Main Street Retail Area		City of Cambridge		Dorchester County	
	Number	Annual % of Growth	% of City	Number	Annual % of Growth	Number	Annual % of Growth
1980	313		7.0%	4,435		11,329	
1990	323	3.41%	6.8%	4,737	6.81%	12,117	6.96%
2000	306	-5.33%	6.6%	4,637	-2.11%	12,607	4.04%
2007	337	10.19%	6.4%	5,290	14.08%	13,535	7.36%
1980-1990	11	3.41%	3.53%	302	6.81%	788	6.96%
1990-2000	-17	-5.33%	17.24%	-100	-2.11%	490	4.04%
2000-2007	31	10.19%	4.78%	653	14.08%	928	7.36%

Source: 1980, 1990, 2000 U.S. Census; 2007, Maryland Department of Planning. Estimates compiled by Market-Economics, 2008.

- Businesses in the Main Street Market Area make up 30% of total retail sales volume within the city (most of the other sales are made in stores located on Route 50). Within the city, the Main Street Market Area has a higher concentration of higher income households, some with an annual income of \$200,000 and more, although this comprises a small portion of the total households in the city. New residential construction in the City has attracted higher income households.
- Downtown captures sales primarily through the sale of prepared food and specialty items through full service restaurants and specialty shops and boutiques. Both City and County residents and tourists are attracted to the Main Street Market Area for these forms of retailing, while convenience goods (groceries, hardware, apparel, etc.) are generally purchased elsewhere.
- However, there is a gap in what is offered in terms of the ability to provide boating lifestyle related goods, upscale groceries, and other specialty items. The residents of the area go outside of the local market to purchase these retail items. The added retail demand would support store growth in the Main Street district.
- *The demand for consumer goods in the retail trade area served by the Downtown (and stores located on Route 50) is adequately met currently, but demand will expand with the addition of more housing, especially new upper income households. To support store and restaurant growth in the city, it is necessary to tap into consumer market segments other than those comprised of Cambridge City and Dorchester County residents.*
- The number of retail businesses located in Downtown has declined, from 84 in 1997 to 67 in 2007.
- Median household income for the Main Street district is \$24,603, is \$30,967 for the City as a whole, and is \$40,650 for Dorchester County, according to 2007 Census Data.
- Outdoor and boating activities generate economic activity, and the retail and service mix can be expanded in response. Opportunities for growth related to tourism are considerable, based on the opportunity presented by the more than 2.5 million people who already travel through Cambridge to and from Ocean City.
- As pointed out in the Maple Street study, for product lines that are sensitive to price (food, apparel, etc.) and choice options, residents shop for those items on Route 50 in Cambridge, and elsewhere in the region.
- Cambridge has seen a small, steady population increase since 2000. This reflects an overall revival in interest in living in towns and cities and in coastal communities. An increase in new construction, up from 16 building permits units in 2000 to 291 building permits in 2006, has added 932 housing units/households to the City resulting in 1,957 additional residents. During the same period, Dorchester County population grew by 3.8% and household growth was up by 7.4%.

PERCEPTION SURVEYS

Telephone and intercept surveys can be used to uncover trends and issues and areas requiring further exploration. For telephone surveys, respondents were selected randomly by automatic dialing. Survey interviews were conducted in the City of Cambridge and Dorchester County, with 110 respondents. Intercept surveys were conducted in Downtown Cambridge (104 surveys were conducted in July and August) and Salisbury (108). While a statistically significant number of people were not surveyed (to place that in context, it is not unusual to have 1,000 people called *state-wide* in a presidential or other political preference poll) the information collected complements qualitative information collected during interviews and site visits.

The results are straightforward and not surprising. People want more retail stores, more things to do throughout the day and into the evening, and a greater variety of restaurants, reiterating that restaurants are key anchors for traditional commercial districts. Crime is seen by some as an issue in the Downtown (perhaps in response to its being reported on in great detail in the local media). These issues are addressed in the body of the report.

Note that “Top of mind” means that people’s responses are provided without their having received specific answers to choose from as part of the question.

Cambridge Intercept Study

1). Top of mind--What are your perceptions of Downtown Cambridge?

- 28 % Not enough to do
- 23 % More stores needed
- 18% Better parking needed
- 16% More nightlife/restaurants needed
- 15% Other

2). What types of stores would you support (keyword) in Downtown Cambridge? (Intercept; 104 surveys)

- Restaurants
- Women's Clothing
- Shoe Stores
- Coffee Shop (café)
- 5/10 Type Store (sundries, household goods)

Telephone Survey, Dorchester County residents

1). What are your perceptions of Downtown Cambridge?

- Not a lot going on
- Need more eating places
- Need more parking
- More places (attractions, stores) for non-residents
- More retailing

2). What types of businesses would you SUPPORT in downtown Cambridge?

- Restaurants
- Clothing Stores (men and women)
- Grocery Store
- Shoe Store
- Hip Hop Store

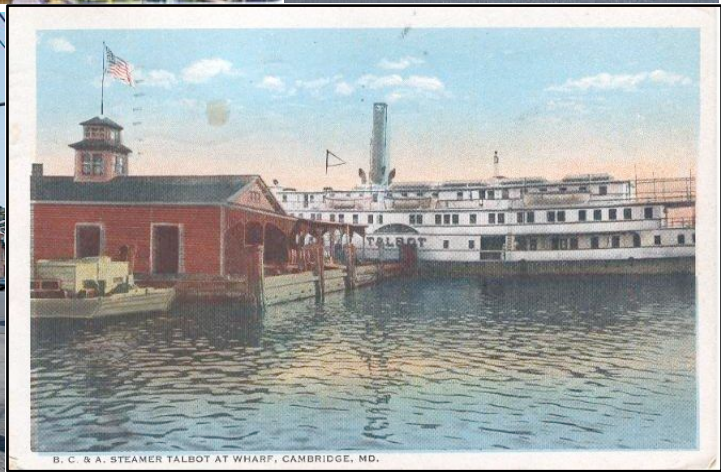
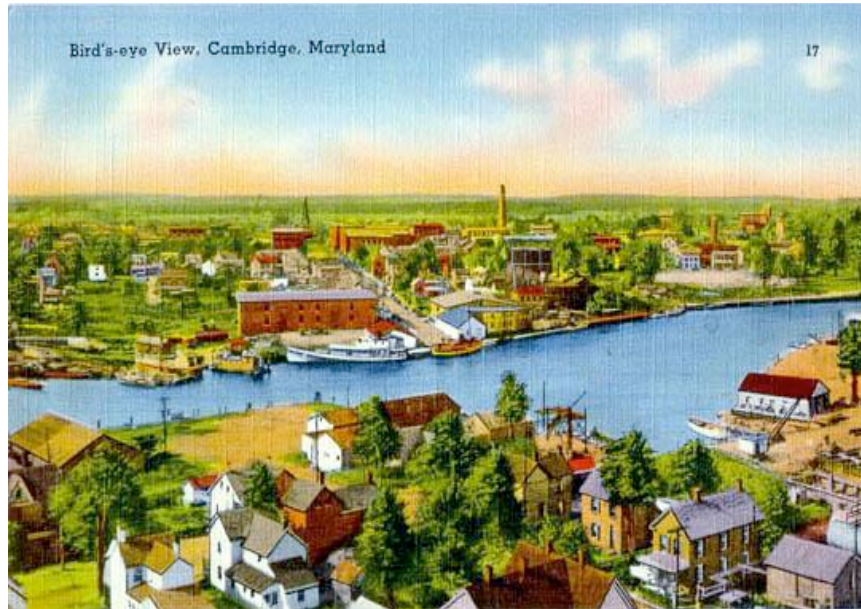
Intercept Surveys in Salisbury

1). Top of mind--What are your perceptions of Downtown Cambridge?

- High crime
- No shopping
- Good for Boaters
- Riots and Aftermath
- Not as Good as Easton, etc

2). What Businesses would you Support in Cambridge--top of mind

- Clothing
- Restaurants
- Boutiques
- Specialty Grocery
- Discount Stores



Top Left: Postcard. Top Right: City of Cambridge Municipal Building. Bottom Right: Intersection of Race and Muir Streets, Downtown Cambridge. Baltimore Sun photo, Summer 2007. Right: Postcard, Steamer Talbot at the Cambridge Waterfront.

THE REGIONAL RETAIL LANDSCAPE AND PLANNING CAMBRIDGE'S MIX OF RETAIL AND ATTRACTIONS

From the standpoint of developing a significant amount of new retail stores, even combined, Cambridge and Dorchester County have a relatively small total population. Typically, depending on household income, each resident supports up to 7.5 square feet of space for retail and restaurant functions. Using this base metric, Cambridge's total supportable retail space would be about 85,000 square feet (s.f.) based on the city population. (By way of comparison, a single branch of a Wal-mart Supercenter can total 225,000 s.f.) A complete inventory of the total retail and other commercial space in Cambridge is not presently available, however site visits indicate that much or more in total commercial space is already present. Cambridge is the county seat, so it is not surprising that a greater proportion of the county's total retail space is located here. Additionally, some space is absorbed by nonretail use, other space is supported by stores with a trade area that extends beyond Dorchester County, and some is vacant.

While the residential population seems small, more than 40,000 people sign in at the visitor center at Sailwinds Park, the U.S. Fish and Wildlife Service reports that annually more than 100,000 people visit the Blackwater National Wildlife Refuge, as many as 175,000 people stay at the Hyatt Regency Chesapeake Bay Resort (based on the number of rooms and industry averages for utilization), according to State of Maryland tourism statistics, 2,500,000 people travel through Cambridge via Route 50 on their way to beaches on the Atlantic Ocean, and thousands of trips are generated by boating activities centered upon 365 marina slips at three marinas (Generation III Marina on Cambridge Creek, the Cambridge Municipal Yacht Basin, and the Hyatt Resort), slips at homes and condominiums, and at public boat landings.¹

Convenience retail stores, branches of regional and national chains (supermarkets, discount, and chain restaurants), and stores requiring significantly larger footprints (lumber and building materials, automobiles) have located along Route 50, while Downtown is marked by specialty retail stores and independently owned/chef-driven restaurants, and the waterfront retains maritime-related businesses such as a marina complemented by some restaurants.

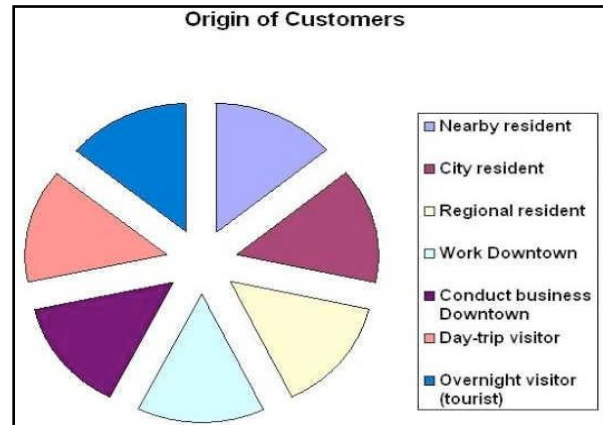
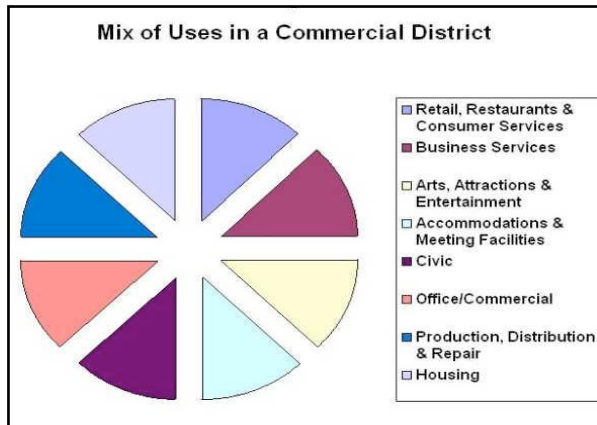
Over the past few decades, the retail industry has significantly changed how it is organized, and has moved from an industry dominated by locally owned independent stores to an environment comprised of large format stores organized as regional and national chains, delivering a discount and value pricing model, and benefiting from significant economies of scale. Simultaneously, chain stores have adopted a preference for locations outside of traditional commercial districts. Most chain store companies favor spaces in regional shopping malls and shopping centers located on major highways, in part for larger footprints, but also to draw customers from much larger trade areas that may span many counties. These shopping centers are built with large parking areas.

Shopping centers have professional management and the retail mix is planned in great detail. In response, the retail offering of a traditional Downtown commercial district must also be planned and shaped. This should be done by considering many dimensions simultaneously, including type of goods sold and price points, and the utilization of civic and cultural assets not normally present in shopping centers such as public libraries, post offices, and cultural and parks facilities.

¹ For public boat landings, see "Economic Impacts from Spending by Marina Slip Renters at Raystown Lake." U.S. Army Corp of Engineers, Engineering Research and Development Center. February, 2008. Economic impact of slips at marinas located in the City of Cambridge was generated by the Boating Economic Impact Model developed by the Recreational Marine Research Center, Michigan State University.

Economic Development Visions employs a five point framework for planning the use mix within a commercial district:

1. Mix of uses;
2. Type and price point of retail goods and services
3. Customer origin;
4. Customer demographics;
5. Daypart planning.



Left: Diagram 1; Mix of uses in a commercial district. Right: Diagram 2, Customer origin segments.

To maintain and extend the competitiveness of a traditional commercial district such as Downtown Cambridge, the study team recommends that Main Street commercial district revitalization programs focus on developing the mix of retail, services, attractions, civic, and other uses that generate trips to the Downtown (and to the waterfront in the case of Cambridge specifically).

Not all downtowns offer the same mix of retail, services, attractions, accommodations, and housing. Cambridge needs to develop the mix that works best for Cambridge. Diagram 1 shows the mix of use categories that typically exists in a community like Cambridge. While planning this mix, the Cambridge Main Street program needs to consider all major trip generators, whereas typical Main Street programs tend to focus on retail and service businesses almost exclusively.

Convenience goods are necessities, typical every day purchases such as groceries, hardware, household items, pharmacy products, etc.; specialty goods tend to be discretionary or involve choice, and include clothing and other items that people shop for in part by comparing options made available by a wider variety of stores (which means that more than one store is necessary for a commercial district to be competitive with other districts for customers seeking such goods); shopping goods can be either necessity or discretionary items, but in either case they are purchased infrequently, are high cost—big ticket items such as appliances, furniture and automobiles, and are not made on impulse. Each of these goods categories can be divided into three subcategories (discount, medium, and high/luxury) based on price. A store's identity, image, and marketing position and strategy are shaped by these factors.

Cambridge has three primary retail-attraction zones:

- Downtown;
- along the waterfront of the Choptank River (which is within the Chesapeake watershed critical area zone, and has development restrictions); and
- Route 50.

For the most part, the sale of convenience goods has shifted from Downtown to Route 50. Specialty retailers, unique stores, entertainment, and cultural assets make up special offerings that most likely cannot be purchased elsewhere, especially at a discount. To maintain interest, increase the total number of shopping trips, and to remain attractive and relevant, traditional commercial districts like Downtown Cambridge must shift their store mix away from lower cost price points and convenience goods categories and exploit niches where price is a less important consideration.

At the same time, it makes sense for the City of Cambridge to step back and plan in a coordinated fashion the development of Downtown, the Choptank River waterfront, and the shopping area along Route 50, in order to meet the greatest variety of consumer needs and price points, to leverage the strengths offered by each respective area, to create the best possible shopping experience, while strengthening Cambridge’s overall position within the regional retail landscape.

The retail mix must be considered in the context of where customers originate and the purpose of their trip. The various customer segments are outlined in Diagram 2, above. Civic uses such as post offices and libraries are particularly important to traditional commercial districts, because people patronizing these services are more likely to visit other nearby stores, service businesses, and attractions as part of the trip. Key also is trip frequency—one-time visits vs. repeat trips; the volume of visits by type of destination; and the average transaction value per trip.

Note that keeping government offices located in the traditional commercial district also helps keep elected officials focused on maintaining the economic viability of our Downtowns.

By focusing on developing the use and retail mix in this fashion, by concentrating retail uses in ground floor spaces and in the most visible locations, and directing secondary trip generators such as office and housing uses to the upper floors of buildings, the Main Street program works to maintain active and bustling streets.

The use mix also should be considered in terms of customer segment and demographics such as age, number of people in a household, including children, work status, etc., as well as by day of the week and time of day, amongst other criteria, as this influences the type and length of trip, what is purchased, and the average dollar value of various transactions.

TIME BLOCKS (DAYPARTS) WHEN ESTABLISHMENTS MAY BE OPEN FOR BUSINESS

	Monday – Wednesday			Thursday – Friday		Saturday	Sunday
Breakfast							
Morning							
Lunch							
Afternoon							
After Work							
Dinner							
Evening							
Late night							

Diagram 3: By taking into consideration the time of day as a major influence on business opportunities, the mix of retail, services, attractions, special events and other programming can be planned in a manner that maximizes patronage of the commercial district throughout the day and into the evening.

Daypart planning and the “24 hour” city

For decades, Downtowns were office and business centers with heavy daytime activity and at the same time were stark and empty places at night, after workers “clocked out” and returned home. In the last two decades, as space has been abandoned in favor of suburban relocation, a greater variety of uses—housing, new retail, and nightlife establishments—have been added to many Downtowns, extending activity into once empty evening time periods.

In community development circles, this has spurred talk of the “24 hour city,” a city active every hour of the day and night and every day of the week. While this vision is not widely attainable except in the largest population centers such as New York City, the idea of extending the hours of activity in our Downtowns so that they can be alive more than just “9 to 5” is desirable for many reasons. This can be achieved by expanding the types of acceptable uses such as housing, which in turn attracts new customer segments and generates additional positive activity on the street, and broadens the use profile of the commercial district.

For commercial district revitalization programs, this means taking a more active role in planning the mix of retail, attractions, special events, and other uses present in our Downtowns. This means expanding the concept of how we plan, to not just plan for types of uses, but for uses during specific time blocks that can be programmed according to the time of day, although programming opportunities may vary from day to day, even during the same time blocks.

In practical terms, this means working to shape the retail mix around how people organize their day—around work schedules, meals, leisure and other activities. In the hospitality profession, particular blocks of time, such as the periods around breakfast, lunch, or happy hour, are referred to as “dayparts.”

A simple way to think about this is how a restaurant is likely to offer different menus, where items offered, portion sizes, and prices may differ significantly, depending on whether the menu is for breakfast, lunch, happy hour, dinner, or late night food service. Some restaurants may choose to not open during certain periods (i.e., breakfast) depending on the business concept. This is done in response to market demand and customer preferences, preferences that can vary significantly according to the time of day (i.e., pancakes or omelettes for breakfast, salad for lunch, and lasagna or meatloaf for dinner, Eggs Benedict for a weekend brunch, a steak dinner on Friday after work, etc.).

Economic Development Visions recommends that commercial district revitalization programs adopt this concept—planning around different times of day to best meet the needs of their customers—to planning the retail and attraction mix to maximize patronage of the commercial district more intensively throughout the day and into the evening.

By utilizing the daypart planning concept, Main Street programs can manage consumer market segments more carefully, by focusing the mix of destinations (retail, restaurants, services, attractions, entertainment) around different demographic segments, to better exploit opportunities when facilities and businesses may be underutilized.

A simple example would be for a theater to offer a weekday movie matinee for families, where children can “run around and be noisy.” This may better satisfy different demographics (families as well as people who prefer quieter cinematic experiences), increasing business patronage, and adding activity to the Downtown during a time period (daypart) when particular facilities are under patronized. Daypart planning is a comprehensive concept, and should focus on developing complementary activities to cross-promote other businesses during trips to the commercial district. For example, a program for families could be aligned with other businesses such as a pottery studio, a bookstore, or a children’s clothing store, along with restaurants. This would extend both the time and money spent downtown in a purposeful and positive manner and result in higher average sales per customer visit.

THE ECONOMIC DEVELOPMENT STRATEGY FOR THE CITY OF CAMBRIDGE

Small towns and rural areas face enormous challenges. Dependence on agriculture and a limited industrial base leaves many communities vulnerable, especially in the context of the globalization of the world economy, industrial concentration, and an overall declining industrial base within the U.S.

Most discussion of creativity and culture as the economic drivers of a knowledge economy tend to focus on larger cities and metropolitan areas. But these ideas are no less important to rural communities. Planning around tourism, arts, culture, history, and downtown commercial district revitalization (often referred to as TADD, for tourism, arts, and downtown development), complemented by the maintenance of agricultural, maritime, and other industry, and research and development activities and colleges and universities shows smaller communities a way forward for (re)building local economies through a renewed focus on culture, creativity and innovation, and the quality of place².

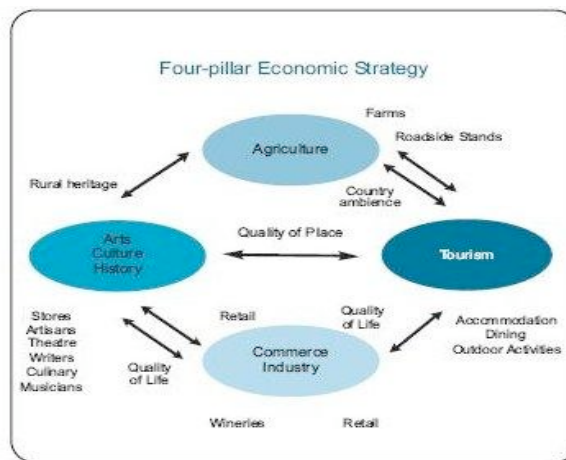


Diagram 4: Visual representation of the “creative rural economy” strategy of Prince Edward County, Ontario. From the article “Building a Creative Rural Economy,” by Greg Baeker, from Municipal World magazine, September 2008, p. 10.

Cambridge and Dorchester County lie within two hours of two major metropolitan areas and within four hours of three additional major metropolitan areas in the Mid-Atlantic, and therefore are well-positioned to participate in the knowledge economy, given easy proximity to major markets, the baby boom wealth explosion (even as crimped by the current economic climate), out-migration and exurban development, housing affordability, an abundance of natural and water-based resources, and qualities of place (heritage, arts, culture).

Cambridge has the opportunity to harness the creative economy as a way forward, along a path to a more broadly conceived economic development strategy positioned for participation in the globally connected, knowledge-based world economy. And Downtown Cambridge is the natural center or “headquarters” for these efforts, given that is the primary location for commercial, civic, and governmental activities within Dorchester County.

As retail chains have entered the market, retail energy has shifted from Downtown to Route 50 and elsewhere in the region. The mix of businesses located Downtown has shifted in turn, with niche retail and restaurants dominating the consumer offerings, along with legal and financial services that remain downtown, adjacent to government

² The Handmade in America heritage area in North Carolina, revitalization efforts in Prince Edward County, Ontario, and a National Trust for Historic Preservation rural economic development pilot project in the Mississippi River Delta (Arkansas and Mississippi) and in Rural Virginia, as well as the state and national heritage area concept are examples of this approach.

buildings and civic functions. As mentioned in the accompanying Retail Market Analysis document in Appendix B, the City of Cambridge accounts for 70% of all retail sales in Dorchester County, although much of the transaction volume is at stores located on Route 50.

By strengthening the offer and spatial relationship between Downtown and the Waterfront, Cambridge can be better positioned as a preeminent retail and visitor destination on Maryland’s Eastern Shore. The idea here is to focus on providing a complete experience—something to do, something to buy, something to eat, somewhere to stay—so that more people spend more time and money in Cambridge and Dorchester County. This is the heart of planning for a community around **what Economic Development Visions calls “destination development.”**

Positioning statement for Cambridge

The strategy for making Cambridge a premier destination and place to live and conduct business within the DC-Baltimore-Philadelphia Metropolitan Areas is to link retail revitalization in Downtown to waterfront redevelopment, the Choptank River, and the positioning of the core of the city around tourism, arts, culture, and entertainment.

This will need to be paired with a master or strategic plan for economic and community development which encompasses the entire City—for example, retaining key employers such as the seafood processing businesses that remain, and other industrial uses along Cambridge Creek—while being complementary to Dorchester County priorities on maintaining and strengthening industrial, agriculture, maritime, and aquaculture sectors of the local economy.

Simultaneously, Downtown should be the #1 place in Cambridge and the Eastern Shore to find independent, entrepreneurial retail businesses. The purpose of this plan is set the stage for Cambridge’s Downtown to be that place—the region’s foremost place to locate and develop entrepreneurial retail businesses.

By leveraging the proximity of the Choptank River and the waterfront by better connecting the Downtown to the waterfront, by strengthening Cambridge as a center for arts, creativity, and microenterprise development through the Arts District, by reshaping the commercial district and waterfront as a destination for interesting retail, entertainment, and cultural activities and as the best place to open a retail business in the Eastern Shore through the Main Street program, the City of Cambridge has the opportunity to generate more economic activity and capture more retail activity from people already traveling to or through Dorchester County.

Recommendation Two: That the Cambridge Main Street Program and Arts District, the City of Cambridge and its Economic Development Department, and potentially the Dorchester County Department of Economic Development (including the Heart of Chesapeake Country Heritage Area) jointly develop a master strategic plan for a coordinated economic development strategy encompassing the Downtown, the City of Cambridge, and Dorchester County, organized around the framework of building a “creative rural economy.”

Coordination is particularly important going forward, as it is likely that municipal, county, and State government agencies face reductions and/or slow growth in revenues and budgets, and achieving the best possible results will require careful husbandry and coordination of limited resources.

Recommendation Two assumes that retail entrepreneurship efforts will be handled primarily by the Cambridge Main Street program, that waterfront development activities will be handled by the Main Street program and the City of Cambridge, that cultural and arts efforts within Cambridge will be handled by the Arts District component of the Main Street program, that the City of Cambridge Economic Development Department will focus on retail and industrial development opportunities located elsewhere in the city, and that the Dorchester County Economic Department will focus on traditional industrial development and attraction activities, the promotion and development of agriculture and aquaculture, maritime-related industry, and the management of the Heritage Area.

HARNESSING VISITOR SPENDING TO PROPEL RETAIL DEVELOPMENT

Over the past few decades, many Eastern Shore communities have lost maritime, agricultural, and manufacturing businesses, including large businesses that had employed hundreds of people and sustained communities for generations. St. Michaels, Easton and Chestertown demonstrate that by harvesting cultural resources—especially signature buildings, people, arts and culture—that decline can be reversed, that economic vitality can be stabilized, maintained, and enhanced.

According to the report *The Economic Impact of Travel on Maryland Counties* (2006), for each dollar a traveler spends, the economic multiplier effect is 1.54, meaning that 54 cents of additional economic activity is generated from each dollar spent, and the earnings multiplier is 0.55, which means that 55 cents of wages are earned for every dollar of tourist expenditure.

The report notes that compared to other counties in the state, Dorchester County doesn't yield a great deal of revenue from tourism. By way of comparison, Dorchester County reaped \$22.43 million in tourist expenditures, while nearby counties Talbot (\$131 million) and Kent (\$35 million) generated more tourism-related revenue. More tourism spending means more successful businesses, selling more, more businesses, and additional state and local tax revenues.

Comparatively, Talbot and Kent Counties achieved significantly greater economic impact through the success of their communities as destinations. For example, through multiplier effects, the difference of \$12.57 million in gross tourism expenditures between Kent and Dorchester Counties means that Kent County generated additional economic activity not only from direct spending, but from indirect spending, totaling about \$6,800,000 in additional revenue—a \$20 million difference in total economic impact.

TRIP EXPENDITURES BY TYPE OF TRAVELER, U.S. AND MARYLAND

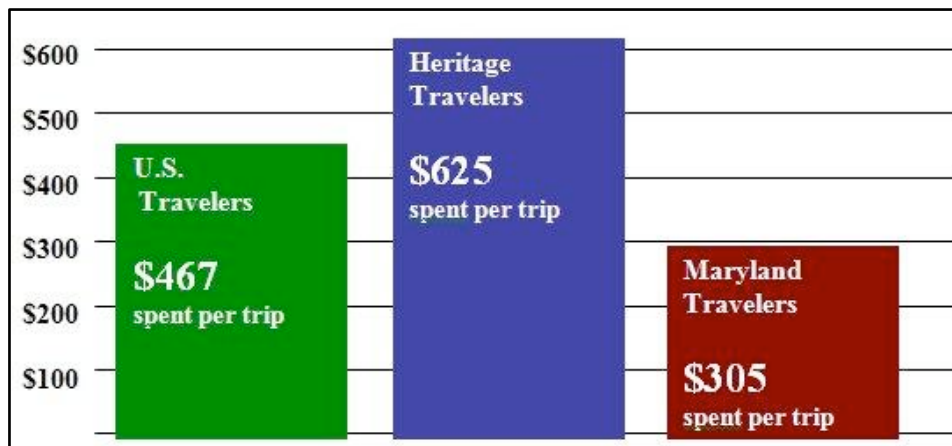


Diagram 5: Data from the *Historic/Cultural Travel Study, 2003*, Travel Industry Association of America and the Maryland Office of Tourism Development.

According to the Maryland Office of Tourism Development, more than 40% of all visitors to the State of Maryland go to Ocean City. The number one activity for Maryland visitors was dining (37%), followed by shopping (24%), sightseeing (17%), entertainment (17%) and going to the beach/waterfront (7%). Typical visitors:

- Spend \$305 per trip
- Stay 1.4 days
- Drive (88% of total trips).

According to studies on heritage tourism, people who choose to see historic places and sites as part of their trip spend more money and more time while visiting, compared to the typical tourist. One way to consider the numbers presented in Diagram 5, which compares the average expenditure of Maryland travelers to U.S. travelers as a whole, and to U.S. travelers seeking culture and heritage experiences, is that the significant tourism spending gap in Maryland when compared to national statistics indicates an opportunity to improve and capture more revenue. This data confirms that retail development opportunities exist (dining, shopping, entertainment) for Downtown Cambridge and the Choptank River waterfront.

ARTS SPENDING PER TRIP³

NONPROFIT ARTS & CULTURE ATTENDEES SPEND \$27.79 PER PERSON			
CATEGORY OF EXPENSE	RESIDENT AUDIENCES*	NONRESIDENT AUDIENCES*	ALL AUDIENCES
Meals/Refreshments	\$10.77	\$16.35	\$13.00
Gifts/Souvenirs	\$3.32	\$4.78	\$3.90
Lodging	\$1.08	\$10.91	\$5.01
Child Care	\$0.34	\$0.33	\$0.34
Transportation	\$1.62	\$4.37	\$2.72
Other	\$2.40	\$3.45	\$2.82
Total	\$19.53	\$40.19	\$27.79
* Residents are attendees who live within the county in which the cultural event occurred; nonresidents live outside of the county.			

Diagram 6

Diagram 6 shows the average daily expenditure by attendees of arts and cultural events, while diagram 7 shows spending averages by various subcategories of outdoor enthusiasts.

Economic impact of arts/culture visitors, outdoors enthusiasts, and boating visitors is estimated based on data developed by Americans for the Arts, the U.S. Fish and Wildlife Service, U.S. Census Bureau, and the Recreational Marine Research Center at Michigan State University. At this time, we do not have specific data for the direct and indirect impact of arts visitors in Cambridge in the same way that data is generated for tourism impact. Likely some of the economic impact of the arts is captured within that data set.

The marinas and public boat launches located within Cambridge means that there is the opportunity to capture a greater percentage of expenditures related to boating and the outdoors. According to estimates prepared by Economic Development Visions, the total direct impact of the three marinas (Cambridge Municipal Yacht Basin, Generations III, and the Hyatt Regency Chesapeake Bay Resort) is \$3.3 million, annually, with 11,694 days spent on the water in an average year. This includes spending on boat maintenance as well as money spent while traveling. The full report is attached in Appendix A.

This data is also useful to gauge the economic impact of outdoor activities at the Blackwater Refuge. Trip expenditures by outdoors enthusiasts range widely, depending on the purpose of the trip, how the trip is organized, and the demographics of the visitors. For example, day trippers don't need lodging, children on school trips tend to

³ Based on data (rounded) presented in *Arts & Economic Prosperity III: The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences* (2006), Americans for the Arts. Expenditures reported are in addition to the cost of admission. For this data, local means within the immediate region/greater retail trade area, while non-local means residing anywhere outside the immediate region, either in- or out-of-state.

bring lunch rather than buy lunch at a restaurant, etc. Expenditures associated with school trips for children, youth, and families tend to have significantly less impact when compared to expenditures of other visitors. Estimates of the economic impact of visitors to the Blackwater National Wildlife Refuge are presented below in Diagram 8.

AVERAGE TRIP EXPENDITURE PER DAY BY OUTDOORS ENTHUSIASTS

	Local/State	Non-Local
Fishing ⁴	\$36	\$41
Hunting	\$28	\$24
Wildlife Watching	\$15	\$28
	Rented Slip	Transient Slip
Boating ⁵		
Power < 40 ft	\$122	\$211
Power > 40 ft	\$178	
Sail < 40 ft	\$59	\$126
Sail > 40 ft	\$105	

Diagram 7

ANNUAL EXPENDITURES BY VISITORS TO BLACKWATER NATIONAL WILDLIFE REFUGE (FY 2008)

	Maryland & Elsewhere	Eastern Shore	All
Fishing ⁶	\$225,414	\$110,024	\$336,438
Hunting & Trapping	\$84,694	\$21,247	\$105,941
Wildlife Watching	\$1,057,716	\$846,174	\$1,903,890
Total	\$1,367,824	\$997,445	\$2,345,269

Diagram 8

⁴ Based on data presented in *National Survey of Fishing, Hunting, and Wildlife-Associated Recreation, Maryland* (2006), published jointly by the U.S. Fish & Wildlife Service and the U.S. Bureau of the Census. For fishing and hunting data, local means residing within the state. For wildlife-associated recreation, local means residing within the county where a facility is located and non-local means residing outside that area.

⁵ Estimates for Cambridge, Maryland prepared by Economic Development Visions using the Boating Economic Impact Model/Calculator developed by the Recreational Marine Research Center, Michigan State University. Year-round/seasonally rented slips are defined as rented by permanent or seasonal residents, while transient slips are temporarily rented to visitors not maintaining local residence.

⁶ Based on FY 2008 data provided by Thomas J. Miller, Park Ranger, Chesapeake Marshlands National Wildlife Refuge Complex, Blackwater National Wildlife Refuge. Based on previous studies, CMNWRC estimates that 70% of BNWR visitors live outside the Eastern Shore region.

This data sheds light on the economic impact of the Underground Railroad Trail throughout the county and region and the creation of an anchoring institution for interpreting African-American heritage on the Eastern Shore, the proposed visitor center for a Harriet Tubman National Historic Park, which is to be constructed on land within the Blackwater Refuge. (Funds have been appropriated for the design of this facility.)

A more detailed study of the potential economic impact of trips to the to-be-constructed Tubman National Historic Park Visitor Center was outside of the scope of this study. In any case, it is important to consider the data and analysis above in terms of planning for the development of complementary destination development assets and activities going forward that will make it possible to deliver a more complete experience and capture greater visitor expenditures from this forthcoming cultural asset.

Comparing Cambridge to St. Michaels, Easton, and Chestertown

It is important to use destination development principles to guide the planning and realization of the retail-service-attraction mix. Talbot County offers two excellent examples of commercial districts as destinations that compete with Cambridge for tourist and other retail dollars in the Eastern Shore, St. Michaels and Easton. Similarly, Chestertown in Kent County is a community that has leveraged its history and historic building stock—the city has the largest collection of buildings in the Georgian style of any small town in the country, and its economic strategy, complemented by a small well-recognized liberal arts college, Washington College, has been to reposition the business and residential districts to support leisure tourism, arts, unique retail, overnight accommodations, and the purchase of second homes.

These communities are models of successful smaller town revitalization and show Cambridge a way forward by focusing on how new cultural assets can anchor commercial districts, leading to the strengthening and extension of adjacent retail, service, and restaurant businesses as well as accommodations options.

The point isn't to copy these communities, but to use the same type of asset-focused development strategy to develop the best revitalization framework that works for Cambridge, ensuring the stabilization, strengthening, and extension of the unique qualities and characteristics that make Cambridge "Cambridge" and not a copy of another place.

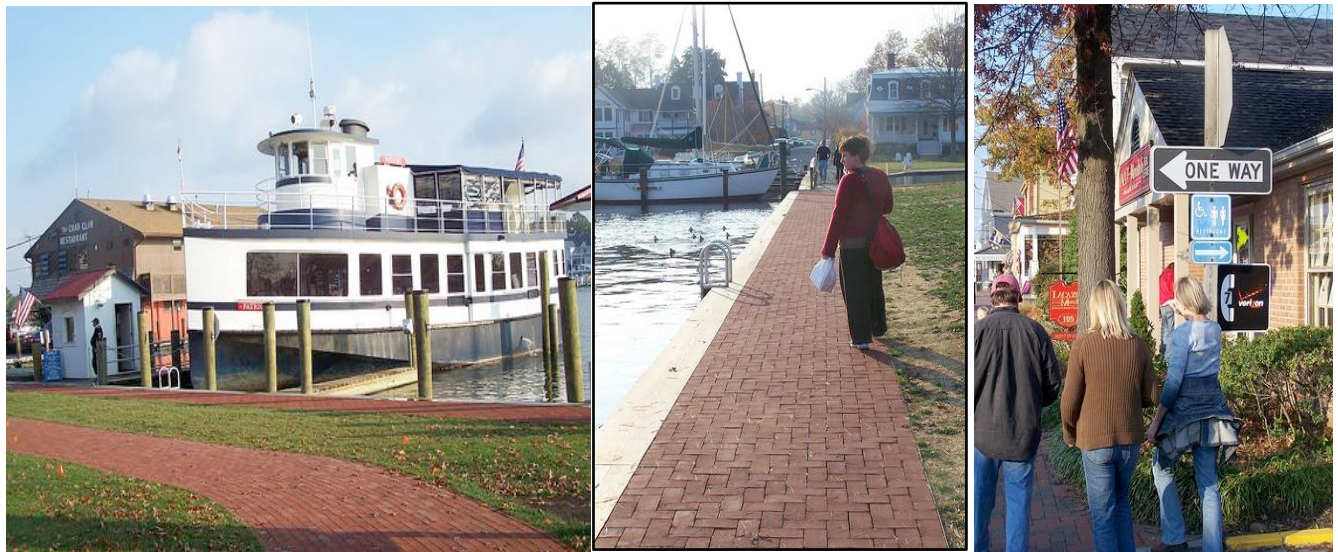
The image is a composite. On the left is a residential advertisement titled "Roomies" and "Roomy". The "Roomies" section shows three people on a couch with the text "Get out of it." The "Roomy" section shows a large house with the text "Get in on it." Below these is a paragraph: "Three becoming a crowd? Move up to the lifestyle you've been waiting for where your money goes further in a home you can afford, all on your own. Baltimore city living...ready to get in on it?" At the bottom of the ad is the website "www.LiveBaltimore.com" and the "Live Baltimore Center" logo. On the right is a photograph of a street in Downtown Cambridge, Maryland, showing a row of historic brick buildings from the 1880s to the 1920s, including a stretch of buildings on Poplar Street.

Left: Ad from the Live Baltimore residential attraction program appearing in the Express newspaper, published in Washington, DC. Right: Quality brick buildings from the 1880s to the 1920s typify the Downtown Cambridge commercial district, including this stretch of buildings on Poplar Street.

Housing. Just as Baltimore promotes its housing opportunities to residents in the Washington Metropolitan area in large part as a good value—more house for less, and a relatively straightforward commute, Cambridge has similar marketable advantages.

The cost of living, the presence of the Choptank River waterfront, other natural assets, and relatively easy accessibility to the Washington, Baltimore, Wilmington, and Philadelphia metropolitan areas, means that housing in Cambridge, especially the West End neighborhood historic district and new housing along the Waterfront and Cambridge Creek, can be particularly attractive for people looking to relocate business activity and/or purchase second homes.

Likely due to the disparity in the array of amenities (retail, civic and cultural assets, attractions, etc.) currently available in the respective communities, a review of comparable home prices for Easton, St. Michaels, Chestertown, and Cambridge finds that that housing in Cambridge, in the historic district or near the water, suitable for either primary or secondary residences, is priced significantly lower, to the tune of 40% to 50%.



St. Michaels, Maryland. Left and Center; waterfront. Right: shoppers strolling on Talbot Street.

St. Michaels. Compared to St. Michaels, Cambridge has a better waterfront and a more attractive commercial building stock downtown. Nonetheless, St. Michaels offers a visitor two days worth of activities—one day on land shopping and dining at a variety of antique, home goods, apparel, and other retailers, an overnight stay at one of more than 20 inns and bed and breakfasts located near the waterfront and on the main commercial street or nearby (Tilghman Island, Royal Oak), and a second day on (or about) the water and maritime activities and heritage at the Chesapeake Bay Maritime Museum plus a boat ride on the Miles River, plus dining. St. Michaels has almost twice the number of retail-specialty stores when compared to Cambridge.

Easton. While not a state-designated arts district, Easton has positioned its identity around the arts—the commercial district includes a number of art galleries, restaurants, boutiques, and cafes, and hosts two major annual events which attract tens of thousands of visitors and a great deal of press—the Plein Air Painting Festival and the Waterfowl Festival. Easton boasts the Eastern Shore’s most significant art museum, the Academy Art Museum, and the most widely patronized performing arts venue, the Avalon Theater, which features concerts by nationally known artists, in addition to plays, lectures, and films. Coffee East is another, less formal, live music venue. Easton lacks the waterfront possessed by Cambridge, and while the Easton downtown area has a number of fine historic buildings, there is a great deal of ersatz new construction which diminishes the historic architectural character and integrity of the business district when compared to Cambridge.

Chestertown. Being located on the (Chester) river means that like Cambridge, Chestertown also possesses water and waterfront assets. Chestertown has also repositioned in part around the arts, but also without the state designation. Like Cambridge, the array of stores downtown selling convenience goods is limited, but Chestertown has a significant core of businesses, with 57 arts, retail, and restaurant businesses serving a variety of customer segments. Other than events at Washington College, the town offers a limited number of cultural assets, excepting on the Chester River, where the Schooner Sultana is berthed and available for sailing trips, and bicycles, kayaks, and boats are offered for rent. Chestertown also has a goodly number of inns and bed and breakfast establishments and is a prime location for second home residences.

Revitalization lessons applicable to Cambridge. But 20 years ago, none of these communities were the kinds of destinations that they are today. The signature lighthouse that St. Michaels uses as the defining image for branding the city's identity as a water-oriented destination was moved to the ever-expanding Chesapeake Bay Maritime Museum in 1966. The city has preserved public access to the waterfront around the Museum, connecting the Waterfront more directly to the shopping district on Talbot Street. Other anchors on the waterfront include a small public marina, the Crab Craw Restaurant—featuring Chesapeake Bay seafood specialties including cracked crab, oysters, and crabcakes, and dock facilities for regularly scheduled boating tours (e.g., in-season, Patriot Cruises offers 4 daily trips on the Miles River; each trip lasts 60 to 90 minutes).

Chestertown focuses on its colonial heritage, marketing the city as “the historic colonial town on the Chester River,” complete with an annual celebration and recognition of Chestertown’s “Tea Party,” where Chestertonians also protested the imposition of new taxes by the King of England. In 2007, Chestertown was honored as a “Distinctive Destination” by the National Trust for Historic Preservation as part of an annual program that calls attention to communities of particular historic and cultural merit that are worthwhile places to visit.



Left: re-enactment of the Chestertown Tea Party, 2007. Middle: Well-maintained streets, sidewalks, and buildings in the Chestertown commercial district. Right: information kiosk on the Chester River for the Schooner Sultana.

Easton has about the same population as Cambridge and a comparable location on Route 50. While the Academy Art Museum is 50 years old, it was not until the mid-1990s that Easton’s Avalon Theater achieved a solid programmatic and financial footing and was able to resume its position and reputation as “the showpiece of the Eastern Shore,” restoring its role as a key anchor for the commercial district. Entrepreneurs, including John General, co-founder of the Avalon Theatre Foundation, opened restaurants and retail businesses in response to the success of the Avalon, to capitalize on the customer flow from the evening activities at the theater and the daytime activity generated by the Academy Art Museum. Today, Easton’s commercial district is on solid footing, with a wide range of businesses where real estate offices and stock brokerages complement art galleries, a supermarket, and a variety of retail shops.

RETAIL DEVELOPMENT OPPORTUNITIES IN DOWNTOWN CAMBRIDGE

The Cambridge waterfront is an unparalleled asset that in combination with Cambridge's superior location on Route 50 and the historic building stock present Downtown means that there is no reason that Cambridge should not be able to have a thriving commercial business district. It is the opinion of the study team that Cambridge is ripe to be the next significant revitalization success story in the State of Maryland.

For this to happen, the Downtown, the Arts and Entertainment District, and the Choptank River Waterfront should be planned in a more coordinated fashion, with one integrated commercial district management and development program. (This is discussed below in greater detail.)

First, to have a successful commercial district Downtown, we must recognize that women conduct upwards of 80% of most retail transactions. To remain successful, commercial districts must be attractive to women. Therefore, factors such as cleanliness, adequate lighting, well-maintained buildings and streetscapes, and the perception of a safe physical environment must be addressed in order to satisfy the expectations of female customers.

Second, strong commercial districts are dependent on restaurants. A complete destination has places to see and things to do, things to buy at interesting places to shop as well as places to dine. *Plus, while people might not purchase retail goods and services every day, they do eat every day.* Without restaurants, patrons won't linger and spend more time and money in your commercial district—because they have no place to refresh themselves. Unable to linger, patrons will come in, conduct their business, and leave very quickly, without taking the time to explore and patronize other retail and service businesses in the commercial district. (This point is discussed further below, in the section on the Business Environment.)

Third, potential customers seek choice and a critical mass of shopping options. From the standpoint of urban economics and what is called "agglomeration," this has to do with the Reilly Law of Retail Gravitation, which is a mathematical formula, but can be summarized simply as "when transportation costs are roughly equal, people decide to shop at the place with more and better retail and/or entertainment choices." In a practical sense, it means that a place with 30-60 interesting and quality stores, restaurants, and inns will be more successful than a place with 20 such establishments—more is better!

These three points have also shaped the study team's analysis and recommendations.

The competitive advantages of traditional commercial districts

Authenticity and Identity. Downtown and the Waterfront can compete on dimensions not available to malls and big box stores—what shopping mall has a real river? Cambridge is the real thing. It has authenticity—a real history that no mall store can ever match. And downtown stores can offer high quality and special services, unique selections of goods, and unique combinations of lines of business that employees at chain stores aren't able to provide. For example, the way that Craig Drug Store has expanded its array of products and services, even though chain and supermarket pharmacies are present in the City and County, demonstrates that even in the face of significant and well-funded competition, independent retailers can remain distinctive and special and maintain and build customer traffic and sales.

Experience/Experiential Retail/The Experience Economy. Independent retailers are learning to compete by transformation, moving away from providing every day products and instead offering experiences, being more than a place to shop, but a place to be and do. Some examples include "In Good Taste" in Portland's Pearl District, which sells kitchen accessories, cookbooks, and wine, has cooking classes in the evening, using an exhibition

kitchen that serves lunch Monday through Friday, and a catering operation; the Wild Rumpus children's bookstore in Minneapolis, where the store maintains a pet shop license in order to be able to have pets in the store—even though the store doesn't sell pets. Animals in the store include chickens, ferrets, hedgehogs, and even a tarantula. A few years ago the *New York Times* ran a story on an art gallery-deli combination-- Gabe's Grouchy Grill, located in Westchester County, New York. Soda fountains and boutique inns are other examples of the same strategy.

Niches and strengths in clusters: In order to compete as a "commercial district" (as opposed to individual stores competing with other individual stores), there needs to be a goodly number of stores present in each category in which the district specializes.

Sometimes store owners and restaurateurs fear the idea of other stores "competing" in the same category. But it is essential to think about this from the perspective of the customer. When people shop for specialty goods, they want variety and choices available to them before making a purchase. If enough choices aren't present, people will go elsewhere to shop, to a shopping district where a majority of their preferences can be met. People want variety.



Left: Gabe's Grouchy Grill, featuring art, Croton-on-Hudson, New York. Right: Pimento the Chicken's fancy feathers and her feline friends, Trini Lopez and Ida B at the Wild Rumpus children's bookstore in Minneapolis.

Cambridge has a number of restaurants at medium price and a number of higher quality restaurants are in the pipeline. There are a number of antique, home and gift stores, and art galleries. There are some high quality boutique clothing stores that are the foundation for a developing cluster in apparel, in addition to the clothing resale niche.

Focus on gaps in the retail mix

In order to be more competitive with other retail destinations in the region, Downtown needs to strengthen its extant niches and clusters. Simultaneously, Downtown Cambridge must also address evident gaps or "holes" in the retail mix. One category suggested by many is higher end grocery and specialty food purveyors. To be successful in smaller markets, it is important for such stores to develop business models with multiple revenue streams (i.e., catering, cafe, prepared foods sales, non-perishable goods).

Recommendation Three: Cambridge Main Street should create a focused retail attraction program to attract the following types of businesses to the commercial district, to strengthen the destination qualities of the Downtown.

Retail categories that can support expansion

- **Restaurants.** Plans to open a number of new restaurants are proceeding. An array of restaurants, taverns, and cafes at a variety of price points is necessary to strengthen the position of Downtown Cambridge as a restaurant destination. A great coffee shop café in the main retail district (Race Street) is also a necessity, offering people a place to gather, hold meetings, etc. Easton's Coffee East is a good example of the kind of offering (coffee,

café, meeting place, music at night) that every arts-creativity district needs.

- *Women's apparel and accessories.* Offer more clothing options at different price points, but not necessarily the highest prices. Having price competitive options are important as well as offering a broader array of store options such as shoes and cosmetics. Clothing is a classic comparison good--people want to consider options before purchasing. To make Downtown Cambridge a stronger shopping destination, there needs to be more stores for women, stores that women shoppers find appealing. Over time, at least three additional stores, including at least one shoe store, may be needed to build this niche.
- *Boatwear/Activewear.* Stores and product lines in this category complement the Waterfront lifestyle and the opportunity to capture greater consumer expenditures from boaters.
- *Men's clothing.* As the commercial district strengthens, it will be necessary to recruit at least one men's clothing store to strengthen the perception of Downtown as a well-rounded retail destination (compared to women, typically men are content to view fewer options before purchasing clothes).
- *Crafts.* There is a knitting store. Adding other craft-related stores such as a "paint your own" pottery studio would leverage experience-based retail and the increased interest in handmade goods and the "make your own trend. A crafts consignment store, featuring items produced by people from the city and region would be a strong addition to the retail offer and extend the Arts District concept.
- *Furniture and home goods.* Cambridge offers a developing cluster of furniture, interior design, and antique stores such as the hybrid design store-gallery, Maris Elaine. This category needs to be strengthened. As more new housing is developed in the region, additional offerings, including linens and other home goods, would round out the offering in this category. A home store focused on the Eastern Shore coastal lifestyle could be an addition, as the revitalization of the Choptank River waterfront proceeds (see below).



Left: Renegade Handmade, a craft consignment shop in Chicago. Shop owner Sue Daly says that despite a nationwide decline in retail sales, her business is holding steady. She says that many people are turning to the handmade and craft movement as a way to save money with the downturn in the economy. Right: a West Marine store.

- *Gardening/landscaping.* A high quality garden store could be an important complement to extant offerings. This could be done through line extension in the gift shop side of the Center Market operation.
- *Bakery.* A bakery-café is a possibility, although there is a bakery operation currently located on Route 50.

- *Specialty grocery/grocery-cafe.* A Few of My Favorite Things is an excellent specialty foods store. Extending this concept with other specialty foods and produce and perhaps a café could help satisfy additional market segments.
- *Waterfront inn/Arts inn.* A boutique inn on the waterfront, thematically focused on the maritime history of Cambridge and the Chesapeake region would be a complementary offering for the Marina and attractive to those interested in staying Downtown. Such an inn would likely be small, but like many distinctive inn properties around the country, the quality and uniqueness of the experience generates a market and revenue stream that would not likely be identified when conducting a traditional market study for a hotel property. Similarly, the proposed boutique hotel on Race Street could take on an arts-based theme to complement the Arts District. (This is discussed below in the section on the Arts District.)
- *Waterfront retail.* Additional seafood-themed restaurants and a maritime supplies store may be in order.
- *Outdoor store.* This is discussed below, as the most successful location for such a store may not be Downtown.

Note that the development of these types of businesses likely will occur through a variety of methods: expansion of current businesses, new businesses created by business proprietors already present in Cambridge, Dorchester County, or the Eastern Shore, by new entrants to the area, and through the proposed Entrepreneurship Development program. Retail attraction programs are necessary in any case, and a natural complement to the Entrepreneurship Development effort.

SELECTED ATTRACTION OF CHAIN STORES TO CAMBRIDGE

Local and unique stores that cannot be found in every other shopping center are the heart and soul of great commercial districts. Yet, while traditional commercial districts have had to reposition around developing and strengthening independently owned businesses, a selective campaign to recruit specific kinds of chain stores may be in order as part of a community's overall destination development plan, to fill gaps in the retail mix, add anchors, to develop and strengthen certain qualities including reputation and image, and to provide additional energies to the revitalization effort.

The familiarity with the brand and identity of certain chain stores is a positive and familiar note to many shoppers. National advertising campaigns help drive customers to these stores, and by extension, to the other stores in the commercial districts in your community. Chain stores can anchor the development of new clusters, and depending on the type of store, can become destinations. Easton shows an example of this, as it has branches of well known national branded stores such as Talbots, Chico's, and Jos. A. Bank Clothiers. Stores such as these tend not to be early entrants into re-emerging commercial districts. These companies may open stores in traditional commercial districts in later stages of the revitalization effort, if the demographics are particularly promising.

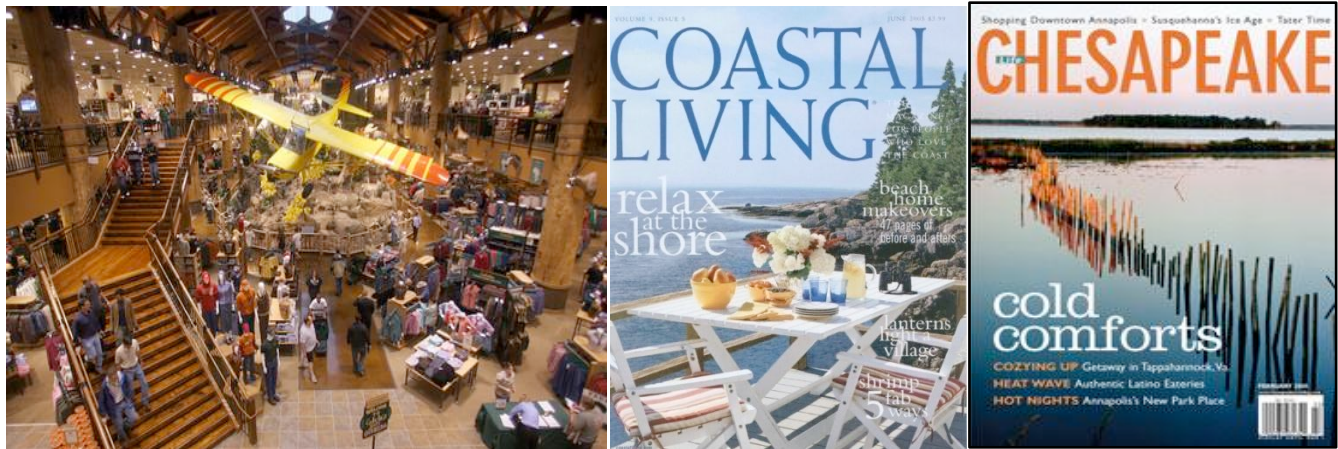
However, more typical chain stores such as Talbots, as desirable as they are, aren't what the study team suggests for this stage of development in an overall retail attraction and development plan that considers Downtown, the waterfront, and the shopping centers on Route 50 in a coordinated fashion.

Recommendation Four: That the City of Cambridge Department of Economic Development considers developing retail attraction proposals for three specific types of chain stores: Cabela's; West Marine; and a store comparable to Bealls Coastal Home. Each store has the ability to shape a desired characteristic of the retail mix for Cambridge vis-à-vis its competitive position within the retail landscape of the Eastern Shore.

Cabela's. This company is a national chain specializing in the outdoors. Dorchester County and the Eastern Shore are defined by "outdoor adventure" and "maritime life" to crib from two of the narrative themes of the County's heritage area. Cabela's competes with Bass Pro (Bass Pro has a very successful store in Anne Arundel County), Gander Mountain (which has a store located in Salisbury), and Orvis (the company also licenses outfitters who sell Orvis branded products in independently owned stores, with a number of licensees present on the Eastern Shore).

The closest location of a Cabela's store to the Eastern Shore is in Hamburg, Pennsylvania, which is 181 miles from Cambridge (and 40 miles beyond Philadelphia). Cabela's is seen as a destination store where some branches draw as many as 4 million visitors annually. A water-themed Cabela's store could be a major anchor for Cambridge and the Eastern Shore, and draw significant patronage. By developing signage and other linkages between such a store to the Downtown and the Choptank River (in advance of its opening), there would be great potential to generate additional business within the city, and strengthen the region's attraction to outdoor enthusiasts.

A typical Cabela's store can range up to 200,000 s.f. and has up to 450 employees, and generates a great deal of sales tax revenue. However, significant property tax and other incentives may be required to attract such a store, which were it to locate in Cambridge, ideally could be sited with rear access to the Choptank River, allowing for boat access as a unique feature for the store.



Left: Interior of the Cabela's store in East Hartford, Connecticut. Center and right: magazines covering coastal and Chesapeake styles.



Left: Vintage hunting and fishing collectibles on display at Chesapeake Classics on High Street. Right: Chesapeake Bay Gateway Network map inset showing cultural and outdoor resources located in Dorchester County. The museum-like quality of Chesapeake Classics, combined with other assets such as the Choptank River and the Blackwater National Wildlife Refuge would support the choice of Cambridge as a good location for a new Cabela's store.

Bealls Coastal Home. Bealls is a Florida-based company with three divisions, a Florida department store chain with over 80 stores, a discount division operating throughout the Southeast, and a startup home furnishings division, focusing on tropical, waterfront, "coastal style." Currently the company has three home furnishings stores in operation with another store planned, all in Florida. The stores average 30,000 s.f. in size. While it would be a stretch, especially in this retail climate where expansion plans are being scaled back by many retail companies, it would make sense for Bealls to extend the Coastal Home concept beyond the tropical lifestyle, with the opening of stores in other coastal locales. (For example, *Coastal Living Magazine* covers all coastal regions of the U.S., and housing décor varies in these areas according to climate.) A "Chesapeake Style" Coastal Home Store, paired with a store like Cabela's, strengthens the outdoor and maritime retail theme of Cambridge and the Chesapeake region and extends this theme more strongly into the home and furnishings sector.

West Marine/ Marine Hardware and Supplies. West Marine had a store in Cambridge, but the store relocated to Easton. West Marine is the most significant chain store company selling marine supplies and hardware operating on a national basis, their having absorbed most major competitors. Competitors are present at the regional level, and there are many independents in the business. If Cabela's were to locate in Cambridge, an additional marine supplies store likely isn't necessary. Alternatively, a hardware store could be developed in or near Downtown/the Waterfront, outfitted with a significant array of marine-related products. An independent would likely be more willing to locate in the core of the city, while a chain store would likely prefer a Route 50 location.

THE PLANNING FRAMEWORK NECESSARY FOR SUCCESS

In line with the comprehensive destination development and management approach that is espoused by Economic Development Visions, this section focuses on those factors that the study team has identified as being key to the strengthening of the competitive position of the City of Cambridge within the regional landscape of the Eastern Shore, and of the opportunity for Downtown Cambridge to serve as the #1 location within the region to open new retail businesses—for Downtown Cambridge to become the center of retail entrepreneurship on the Eastern Shore. These factors are:

- Community branding, Image Development and Advertising
- Business Environment
- The Arts District as more focused Economic and Community Development
- Waterfront
- Urban Design issues Downtown
- Urban Design issues on Route 50
- Wayfinding and interpretation

COMMUNITY BRANDING, IMAGE DEVELOPMENT AND ADVERTISING

A destination's identity (brand) is the sum of what people think when they hear the community (brand) name. It's how prospects feel when they first arrive at the destination's website or see an advertisement, read an article in a newspaper or magazine about the community, or discuss the place with friends, and it's what people expect to experience once they arrive to a place after having selected it over other choices.

Community branding is an important issue that all municipalities must address. At its root, it is about identity and vision and being focused at all times on realizing the vision that the community intends to achieve and maintain. Everything about Cambridge either supports or diminishes how the city is perceived throughout the region and beyond.

There are well-branded cities and places...with well-defined stories (narratives and themes), distinct attributes, consistent messaging, and delivery of the brand promise at all (touch) points where the community is “consumed.” Less well-branded communities believe that community branding is just a logo ... and fail to focus on making the total (complete) experience congruent with the promise—able to be delivered on all dimensions within their destination.

Successful destination branding requires:

- 1) Clear definition of the place and what it offers;
- 2) Being distinct;
- 3) Delivering on the definition and the promise;
- 4) Consistently communicating the definition in all forms.

Just as the study team believes that “*we are all destination managers now*,” elected and appointed officials in particular and in association with other community stakeholders serve as a community's “brand managers”—whether or not they choose to think of their roles in this manner.

That means that decision-making on land use and zoning, business issues, infrastructure development (roads, sewers, water, utilities, transit), technology (broadband Internet, etc.) and quality of place factors (arts, culture, historic preservation and heritage, education, public schools and libraries, etc.) must be consistent and focused on making the right decisions, the decisions that collectively achieve and support the realization of the community's desired vision and positioning.

The materials that the community uses to communicate (print media advertising, brochures, websites, radio and television commercials, billboards, public relations placements, press releases, etc.) also must be consistent with the vision and positioning of the community's branding program.

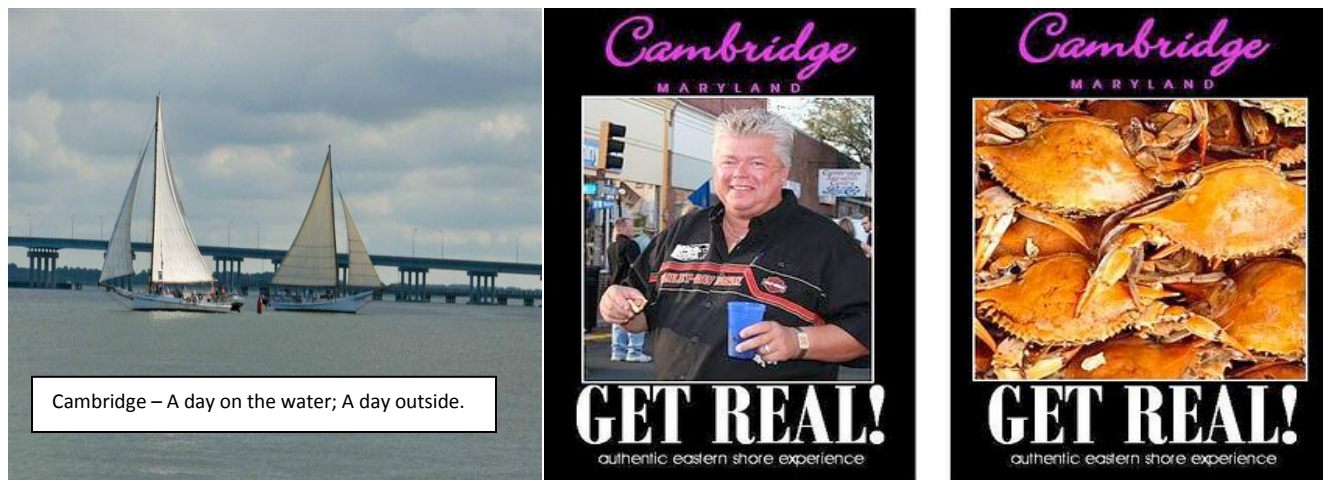
Recommendation Five: That the Cambridge Main Street program and the City of Cambridge Economic Development Department (in consultation with other stakeholders, especially the Heart of Chesapeake Country Heritage Area) create a brand management team to develop, manage and execute a communications plan to achieve the City's communications, community branding, and positioning objectives.

Such a plan should start with an evaluation of current efforts. The section below is by no means a comprehensive evaluation, which would include an evaluation of media relations programs, wayfinding signage, kiosks, and other media such as articles in newspapers and travel magazines, in addition to more traditional forms such as brochures, websites, and advertising. Such a detailed review was outside the scope of this study.

Brochures. For the most part, brochures developed for attractions and the Downtown commercial district are quite good. However, the team recommends that downloadable versions be developed and made available through allied websites. Design and printing support could be provided to allied organizations producing brochures on local attractions, to ensure that branding objectives are achieved.

Websites. The Cambridge Main Street website is well-done, although information isn't always up-to-date, and the Arts District section is underdeveloped. By comparison, the City of Cambridge main website is dowdy and in great need of redesign. The Choose Cambridge economic development website is well-designed, although likely in need of some updating. The Dorchester County, Dorchester County Tourism, Heart of Chesapeake Country, and Choose Dorchester websites are generally good.

Print media advertising for Cambridge. The study team believes that advertising developed for Cambridge and for the Heritage Area is in need of a tune up. In an earlier draft of this report, the study team suggested a concept that in retrospect is overly focused on boating and the water. Instead, print-based tourism advertising should make clear that the community offers a complete destination—a wide array of outdoor, water-based, shopping, dining, and cultural activities. The ad idea originally suggested is shown below on the left. An alternative concept has been developed by the Cambridge Main Street program, in a series of image ads called “Get Real,” with the tagline “authentic eastern shore experience.”



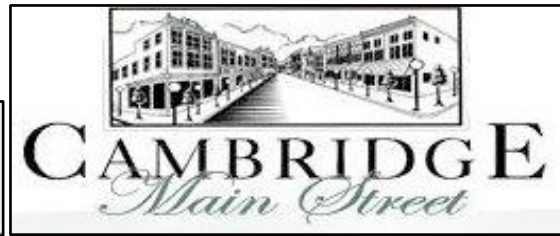
Left: an ad concept from the study team, skipjacks on the Choptank River. Image: Cambridge Main Street. Right: Sample advertising campaign, Cambridge Main Street program.

The Get Real series has excellent photos, but the series reads as posters not ads. As currently produced, the series inadequately communicates benefits to visitors, fails to make a strong enough call to action—a call to action that would lead potential visitors to choose Cambridge over other destinations, and neglects to include contact information or a response device.

Plus, it's not clear that the ads adequately communicate Cambridge's unique features and competitive advantages. Everyone talks about how Cambridge has great buildings downtown. There are no great photos showing the pedestrian friendly Downtown, etc.

Logo. The use of script typeface as a “logo” for “Cambridge” in the “Get Real” posters demonstrates a pressing need to create a strong logo that succinctly communicates the identity and “brand message” of Cambridge, in a manner to how St. Michaels has developed a logo featuring the water, the signature lighthouse at the Chesapeake Maritime Museum and a strong tagline, “The heart and soul of the Chesapeake Bay.” The St. Michaels logo is used

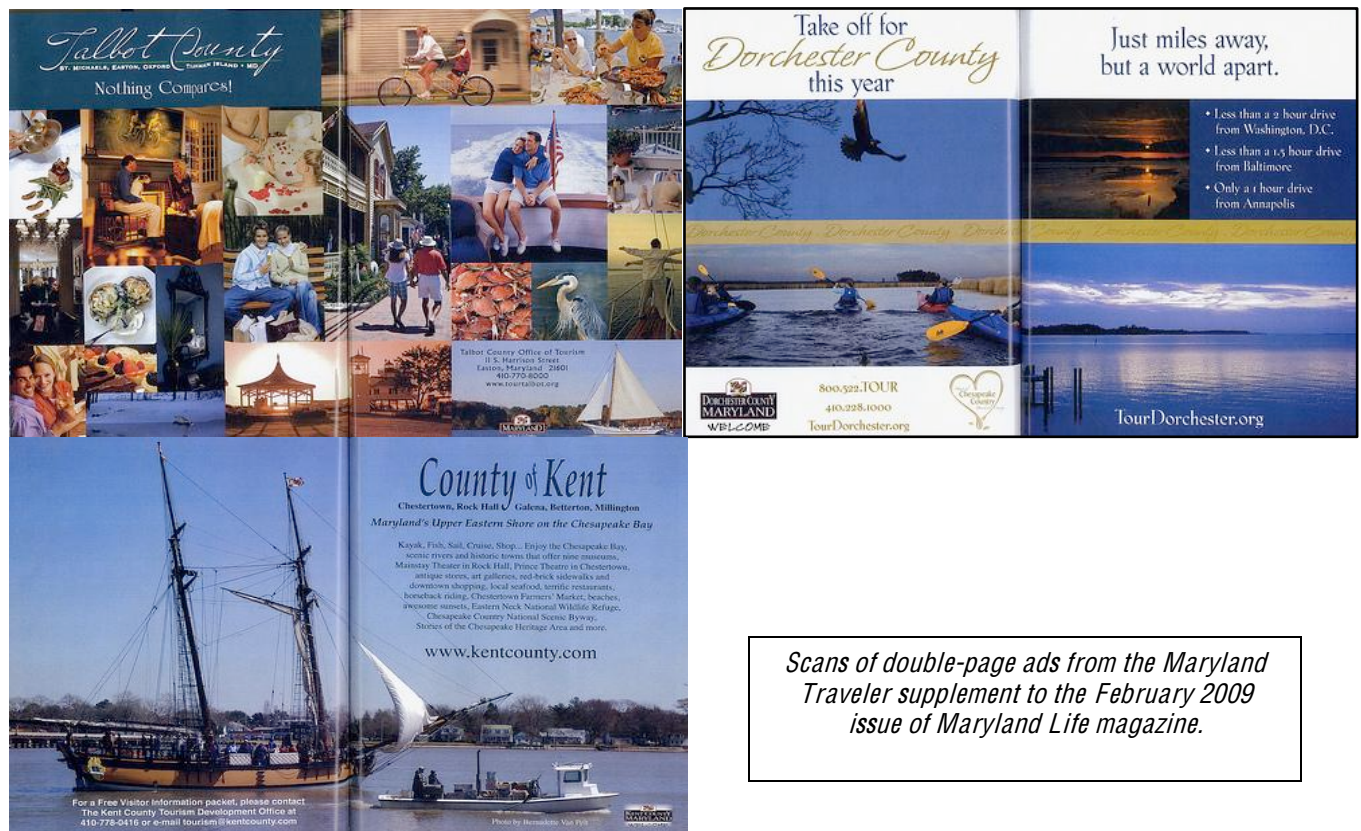
on their website and in a wide variety of other media.



The Cambridge Main Street logo is quite good, but Cambridge as a destination offers more than the commercial district and the creation of a more comprehensive logo capturing more of the city's touch points – High Street, historic housing, the waterfront, crabs, oysters, and seafood, sailing and the Choptank River, etc.—may be in order. The question of appropriate logos and taglines must be addressed by the community brand management team, within the context of the development of a comprehensive and ongoing communications and media plan.

Print advertising by the Heritage Area. An examination of ads placed in the “Maryland Traveler” supplement to the February issue of *Maryland Life*, the destination tourism magazine covering the State of Maryland, also finds some problems with the directness and completeness of the message that is delivered.

The study team reviewed most of the ads in the supplement, which featured ads from all across Maryland. Rather than compare Dorchester to Annapolis or Baltimore, we chose to compare ads for Dorchester, Kent, and Talbot Counties, the City and County's most direct competitors. While the Kent and Talbot ads have defects in terms of completeness, they are still better in how they communicate the offer of a complete destination that will be appealing to potential visitors. The Talbot ad does this mostly through visuals, while the Kent ad does this mostly with text.



Scans of double-page ads from the Maryland Traveler supplement to the February 2009 issue of Maryland Life magazine.

From the standpoint of media planning, the study team noticed that neither the Cambridge Main Street program nor the Hyatt Regency Chesapeake Bay Resort placed ads in this supplement, although the study team has come across Hyatt ads placed in various editions of the *Gazette* newspapers, which are distributed in various Maryland counties including the Washington suburbs of Montgomery and Prince George's Counties.

It is imperative that the advertising programs of the Cambridge Main Street program, the Arts District, the Heart of Chesapeake Country Heritage Area, and the Hyatt Regency Chesapeake Bay Resort be well coordinated in order to achieve maximum impact.

The study team cannot overemphasize the importance of developing stronger advertising campaigns that better communicate the qualities of the visitor experience offered by Cambridge, Downtown, and the Waterfront, in combination with the attractions present in other parts of Dorchester County.

An example of the direction to move toward would be a hybrid of the Talbot and Kent ads—the Talbot ad includes a number of images showing the wide variety of experiences offered but with inadequate explanation, and the Kent ad has inadequate images but includes a compelling list of things to do and places to visit on a trip to Kent County. We suggest an ad having about 60% of the number of images from the Talbot ad, combined with text along the lines presented by Kent County.



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Advertisement, Hyatt Regency Chesapeake Bay Resort. Silver Spring edition, Gazette Newspaper, November 19, 2008.

THE BUSINESS ENVIRONMENT IN DOWNTOWN CAMBRIDGE AND DORCHESTER COUNTY

The business environment is shaped by many factors including tax rates, impact fees, the ability to cost effectively seek zoning changes, business licenses, building permits, the price of real estate, the general functioning of the economy and other factors. The region is lightly populated, and broader business trends including the globalization of industrial production, agriculture, and maritime-related commerce have not favored rural communities. As discussed above, the City's economic development strategic vision should address these issues within the framework of the development and extension of the "Creative Rural Economy," with Cambridge serving as the headquarters of the Creative Rural Economy in Dorchester County.

Given limited resources, it is essential for the City and the County to make it relatively simple to conduct business, while at the same time protecting public health and welfare. Similarly, given the present-day economic climate and budget constraints this presents, going forward it will be especially important for both the City of Cambridge and Dorchester County to work more closely together, in order to be able to provide the greatest amount of services desired by residents, property owners, business proprietors, and other stakeholders, while delivering these services in a timely, cost-effective, and successful fashion.

Currently, retail development in Downtown Cambridge is stymied over restrictions that limit the ability to grant licenses to sell alcoholic beverages for on-premise consumption in restaurants in certain areas of the Downtown. This has been covered extensively in news articles in the *Easton Star-Democrat*, and in the letters to the editor of that paper, including a lengthy submission from the Dorchester County of Commerce.

The fact is that commercial district revitalization is dependent on restaurants. *A complete destination has places to see and things to do, things to buy at interesting places to shop, and places to dine.* As discussed above, restaurants are the anchors of commercial districts, allowing for more frequent patronage, and making it possible for people to extend their visits to our Downtowns beyond the mere completion of errands. Dining is also a key activity and interest for visitors to Maryland, according to studies by the State Office of Tourism Development.

The State of Maryland has a law forbidding the on-premise consumption of alcohol at establishments located within 300 feet of a church or school, although the law allows for exceptions. Like most traditional commercial districts, the Downtown in Cambridge is a classic mixed use district, and includes a number of noncommercial uses ranging from government offices, including the County Courthouse, Municipal Building, and the County Library, to the Post Office and churches. One of the unintended consequences of mixed use locales is the need to be able to conduct a variety of types of retail business in close proximity to noncommercial organizations which may have goals and objectives which at times can conflict with retail commerce.



Left: flyers about the liquor license issue in the window of Dragonfly Boutique. Right: outdoor dining in Pasadena, California.

This is not a problem exclusive to Cambridge. In fact, in 2006, Washington, DC changed certain laws concerning alcoholic beverage sales so that restaurants in defined commercial districts could operate despite the nearby location of schools and recreation centers (because of the Separation of Church and State clause within the Bill of Rights amendments to the Constitution of the United States, the City of Washington previously removed Church-based exclusions from the law).

Smart Growth principles call for the co-location of civic uses, transit, and retail, and didn't anticipate some of the conflicts and unintended consequences present in other parts of typical municipal codes. Ironically, one of the problems with these kinds of laws is that children, usually the intended beneficiaries of such laws, are in the area during the day, but not at night, when the sales of alcoholic beverages most typically occur.

There are many issues to consider:

- (1) The reality is that restaurants have narrow profit margins, at most 15% after taxes. The profit margin on food before expenses can be as little as 60%, while from alcohol and other beverages it is about 80%. This difference in margin can be the difference between profit and loss, because from the gross profit margin all the expenses of the business must be paid—labor, rent, utilities, taxes, interest on loans, etc.—before any net profit (real profit) is generated.
- (2) If the City and the County are not on the same page with regard to economic development, especially in the Downtown, this must be addressed.
- (3) If there are Commissioners on the Licensing Board who are generally opposed to the consumption of alcohol, the members of the Dorchester County Council must consider whether such appointees are appropriate, because the consumption of alcohol is legal and furthermore, supports the development of and continued operation of restaurants, which generate significant property and sales tax revenues for local jurisdictions.
- (4) Land use policies promoting mixed use should be reviewed to ensure that any potential legal conflicts are eliminated. A petition by the Dorchester County Council to the County's delegation to the Maryland General Assembly, for legislation to exclude Downtown Cambridge from this provision in the State Law, allows this conflict to be reconciled.

In the interim, investors and potential business proprietors are reconsidering plans to open businesses, and/or to buy and/or to rehabilitate properties. As much as \$20 million to \$30 million in investment is at risk.

In the current economic climate, it is important for all government and business stakeholders to be on the same page with regard to continued investment in Downtown Cambridge.

Recommendation Six: That the Dorchester County Delegation of the Maryland General Assembly (Senator Richard Colburn and Delegates Rudy Cane, Addie Eckardt, and Jeannie Haddaway) move forward the proposed amendment to Section 9-210 of Article 2B of the Annotated Code of Maryland now pending before the Maryland General Assembly (Senate Bill No. 333, and House Bill No. 425).

The amendment would exempt the City of Cambridge and the Town of Secretary from the 300-foot setback requirement for issuance of Class B Liquor Licenses issued by the Dorchester County Board of License Commissioners.

(Note that since this report was first compiled, a bill addressing these concerns has been drafted for consideration by the Maryland General Assembly which has resulted in changes to the recommendation above.)

STRENGTHENING THE FOCUS OF THE ARTS DISTRICT ON ECONOMIC AND COMMUNITY DEVELOPMENT



Top left: Map from the Shorelines newsletter. Top right: Main Street Gallery, Second Saturday opening, November, 2008. Bottom left: Room in the 21C, a Louisville hotel developed around the art theme. The hotel includes a 9,000 square foot contemporary art museum, and a rotating collection of original artworks are displayed in guest rooms. Bottom right: Storefront Artist Project, Pittsfield, Massachusetts.

Maryland's state art district designation program provides tax benefits, incentives, and other benefits to local jurisdictions working to develop and integrate arts-based community and economic revitalization strategies. At the same time, to best realize the benefits of this designation, it is important to be sure that an "arts district" includes culture and heritage. An "arts, culture and entertainment district" includes galleries and festivals and also encompasses culture, attractions, heritage, the practice of craft, and business development.

Revitalization through tourism, arts, and downtown revitalization is a regional effort, one in which Dorchester County (through the Heart of Chesapeake Country Heritage Area and other County economic development efforts), the City of Cambridge, various agencies of the Maryland State Government, certain federal government agencies including the U.S. Fish and Wildlife Service and the National Park Service, and a variety of regional institutions have invested and continue to invest a great deal of time, effort, and money.

At the same time, the Cambridge Main Street program and the City of Cambridge must be more expansive in their efforts to harvest cultural assets and opportunities present within the city, in keeping with the idea of the "Creative Rural Economy" as the organizing framework for economic and cultural development planning in the city and region.

Recommendation Seven: The Cambridge Arts District must broaden its focus and include the development and harvesting of cultural assets beyond “arts” and entertainment, to specifically include cultural opportunities present in Downtown and on the Waterfront, and fostering the production of arts and crafts products, not just the consumption (purchase) of arts products.

The Downtown has a number of key assets such as the recently relocated Dorchester Center for the Arts, which has aggressive plans to build out its recently occupied facility and fully realize the opportunity presented by their new and larger building, the Harriet Tubman Center, which has erratic hours making it difficult to serve as an effective anchor, the Richardson Maritime Museum on High Street, Gallery 447, a co-operative for artists providing separate studios and gallery space, anchor arts businesses such as Joy de Vivre and the Maris Elaine Gallery, and the new Main Street Gallery which is operated by the Main Street program/Arts District.

The study team sees the failure to depict cultural assets such as the Tubman Center and the Richardson Museum on the above map of the Arts & Entertainment district to be a significant omission and an indicator of a gap in the current approach.

Other communities offer examples from which to learn. For example, the Gateway Arts District in Prince George’s County developed a multi-pronged approach focused on the development and strengthening of cultural anchors, studio and incubation space, live/work housing opportunities for artists, the support of retail and service businesses with a connection to the arts and culture, the creation of public art, and physical improvements to buildings and signage.

Separately, the Gateway Community Development Corporation works to ensure that new buildings constructed in the defined arts district support the arts district, whether or not this is required by zoning. An example was the construction of a storage facility in North Brentwood. Through advocacy efforts and negotiation, the developer agreed to construct ground floor retail/studio spaces. Without these efforts, the building would not have contributed to the strengthening of the retail and arts orientation of the commercial corridor. The Gateway Arts District is complemented by the Anacostia Trails Heritage Area, which supports the development of cultural assets, tourism promotion, and coordinated interpretation and wayfinding signage, among other projects.

Other examples that should be considered include the Paducah (Kentucky) artist attraction program, the Pittsfield (Massachusetts) Storefront Artist Project, which creates temporary gallery spaces in vacant buildings, and how the Penn Avenue Arts Initiative in Pittsburgh (a particularly relevant example for Cambridge), has developed arts spaces (such as the Pittsburgh Glassworks) as anchors around which to focus retail revitalization efforts. In Lancaster, Pennsylvania and Louisville, Kentucky, boutique hotels have been developed with an arts theme. The Creative Alliance at the Patterson Theater in the Highlandtown Arts District in Baltimore shows a different way to use a historic theater building. The Patterson Theater is not merely a place to “consume” films, lectures, concerts, and plays; it is also an anchoring institution for allied arts organizations based in the building, who use the facility in part for the creation of projects and products, and the Theater auditorium as a place to present.

Recommendation Eight: The Cambridge Arts District should develop a Management Plan comparable to the detailed management plan developed for the Heart of Chesapeake Country Heritage Area.

Below are a number of suggested areas to consider in expanding the “concept” of an Arts District as more than “something Downtown,” but as the organizing tool that can redefine the City of Cambridge as the Center of Creativity, Arts and Entrepreneurship on the Eastern Shore. This requires that the City and the County jointly focus economic development efforts on the realization of the “Creative Rural Economy,” with each party focusing their efforts where they are best situated to add value and bring about success.

- Specifically include cultural facilities within the definition of the Arts and Entertainment District (e.g., the Pittsburgh Cultural Trust has developed a number of cultural facilities and allied programs in Downtown Pittsburgh).
- Ensure that the Arts Management Plan thoroughly considers each discipline and doesn't ignore digital media in particular. For example, as part of its focus on the visual arts, VisArts, the Metropolitan Center for the Arts in Rockville, Maryland, offers an extensive digital arts program for youth and adult audiences.
- Ensure that the Arts Management Plan supports artists as producers, as well as focusing on the support and development of arts institutions.
- Support, strengthen and expand the extant cultural assets in the commercial district such as the Dorchester Center for the Arts, the Harriet Tubman Museum and Educational Center, and the Richardson Maritime Museum (the Richardson is addressed in the next section on the Waterfront and it should be presumed that the best place for this Museum is on the Waterfront).
- Develop new cultural anchors to strengthen and extend the Arts District, such as working to recapture the old Tolley Theater and rehabilitate it into a thriving performance space (film, music, theater, lectures) and anchor for creative production.
- Explore with Chesapeake College the option of relocating the school's arts-related academic departments such as visual, performance, and media to Downtown, to further anchor the arts side of an expanded Arts and Culture District, including a college art gallery open to the public, comparable to how Gallery 51 in the commercial district of North Adams, Massachusetts is sponsored by the Massachusetts College of the Liberal Arts.
- Support artists, by developing and strengthening the "creative infrastructure" that supports artists in producing their work, including artist-craft production facilities (i.e., glassmaking, ceramics, printmaking, etc.) to serve as anchors and centers providing support, development, and production assistance for artists (Baltimore Clayworks is an example for ceramics, the Washington Glass School in Mount Rainier is one example of a glassmaking studio, Pyramid Arts Center in Silver Spring is an example of a facility focused on paper-based arts, etc.).
- Expand and develop more collaborative and/or co-operative studio space opportunities along the lines of Gallery 447 and the teaching and studio facilities provided by the Dorchester Center for the Arts.
- Integrate an arts orientation into new businesses when appropriate and practical—such as how the Ave Spa and Chesapeake Classics decoy store and museum incorporate arts within their business concepts.
- Consider developing the boutique hotel proposed Downtown (a project being pursued by the principals of the Maris Elaine Gallery) as an Arts Hotel comparable to arts-themed lodging such as the 21C in Louisville, the Lancaster Arts Hotel in Pennsylvania, and the Charlotte Hotel in Onancock on the lower Chesapeake Peninsula;
- The creation of work lofts (not live-work spaces which can be more focused on housing and less on artists as producers) and production spaces for furniture, software and other media projects is a way to absorb vacant and/or underutilized space Downtown and in other areas within Cambridge.
- The Dorchester County School System, in conjunction with other stakeholders such as the regional community college, Chesapeake College, the Dorchester County Library, and other stakeholders could reposition its teaching program and curriculum around the needs of the creative rural economy.

A way to consider this is as an extension of the concept of the "Arts District" beyond the commercial

district and into the schools by refocusing the curriculum around visual (painting, drawing, ceramics, sculpture), performance (music, dance, theater), media and design (computer graphics, broadcasting, photography, graphic design, software development, engineering), and language (English, foreign language and culture, expository and creative writing, journalism) “arts.” Many school systems have arts programs or arts schools such as the High School for the Performing Arts in New York City, but no Arts District in the country has worked with the local school system to recreate a “community of creativity” starting with the entire system of local public schools.

The School System and the Arts District can work together on the joint development of artist in residence programs to strengthen the creative infrastructure in the community and generate multiplicative impact from what would otherwise be separate unlinked programs.

To emphasize the depth of this idea, it isn't merely about offering supplemental arts instruction in the schools, it is about a refocusing of the entire K-12 curriculum around the development of all of the skills and capacities required to fully participate in a knowledge-based economy.



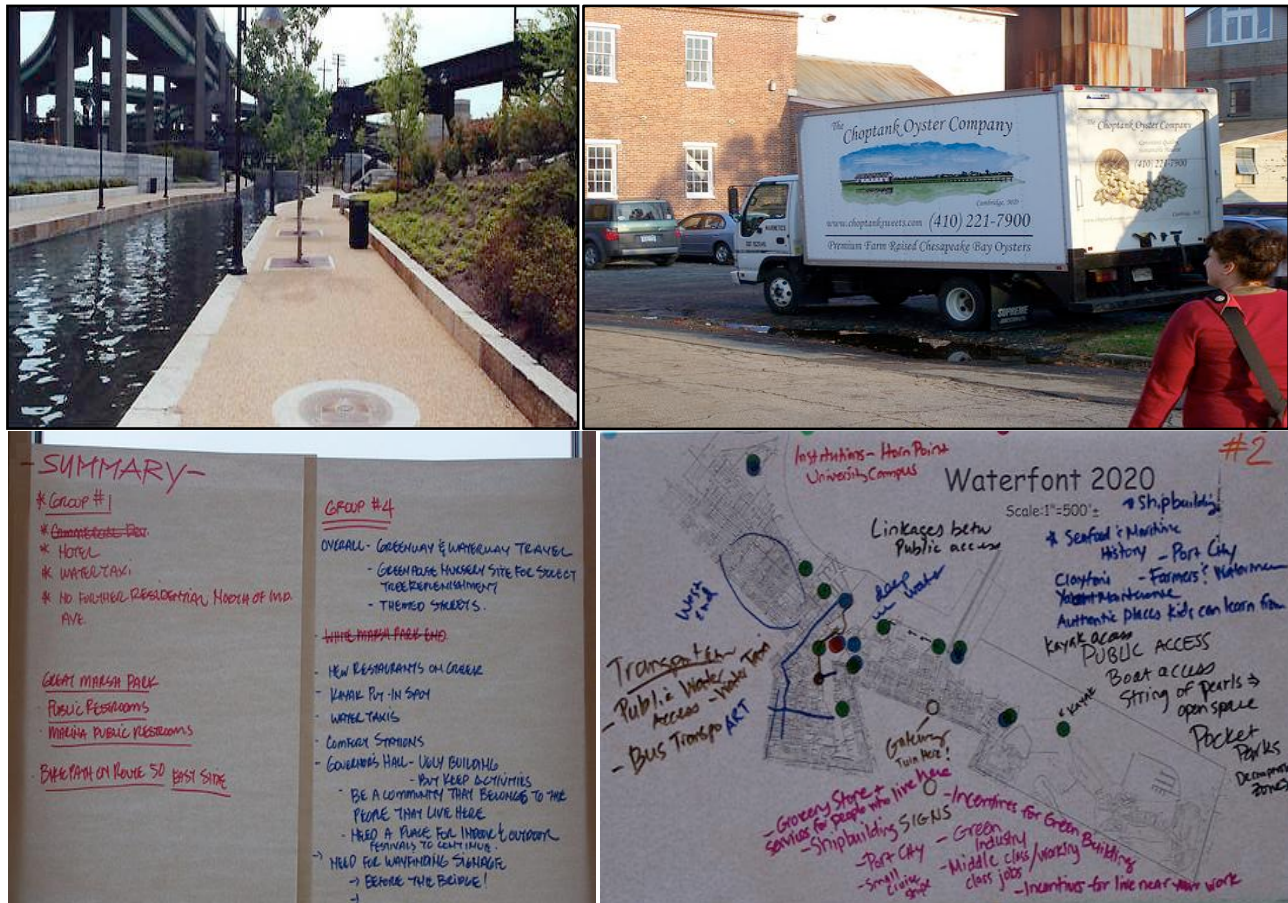
Top: Children engaged in arts activities. Bottom Left: Matthew Falls, a furniture maker residing in Cambridge, chooses to show his work in a gallery in Washington, DC. A stronger creative infrastructure within Cambridge would make it more profitable for artists and craftspeople to sell their work in Cambridge. Bottom Middle: A child violinist, the Art Fair at Adams-Morgan Day, Washington, DC. Bottom Right: Music technology course, Arlington High School, Massachusetts.

- Within the entrepreneurship development program that will be created as part of this overall study, develop a set of ongoing training programs focused on the business and entrepreneurship side of arts and crafts production.
- Consider developing a artist attraction program (i.e., Paducah) as a way to attract more artists to Cambridge, and to build demand for housing in particular neighborhoods (this could be a strategy implemented by the City's Maple Street program) where objectives support adding new residents.
- Include historic preservation and cultural interpretation programs and signage systems within the Arts District Management Plan (this is discussed further, below), and a sub-plan for public art.

LINKING DOWNTOWN RETAIL REVITALIZATION WITH WATERFRONT REVITALIZATION

There are many examples of successful waterfront-based revitalization efforts. In Lowell, Massachusetts, the plan centered on restoring mill buildings and leveraging access to the canals and riverfront—recognizing the opportunities inherent in the industrial heritage of the community. Providence, Rhode Island’s Waterfire festival, waterfront park, and related activities is another example. So are efforts in Savannah and Augusta, Georgia.

But Cambridge does not have to look outside of the Chesapeake Bay region for examples on how a waterfront can be harnessed for community revitalization. Baltimore’s Inner Harbor, St. Michaels in Talbot County, and Richmond’s Canal Walk are examples of how differently sized communities have been able to leverage their waterfronts as a way to strengthen community pride, highlight local heritage, and improve the local economy.



Top left: Richmond Canal Walk. Top right: A Choptank Oyster Company truck. The aquaculture firm cultivates about 5 million oysters on 3,000 floats in a river near Cambridge. The business, founded by a husband-and-wife team interested in oyster recovery, raises disease-free oysters — a rarity in the troubled Chesapeake Bay watershed. Bottom left and right: tear sheets, recommendations from the Cambridge Choptank Riverfront Revitalization Charrette, November 14, 2008.

Cambridge has begun this process by creating of Sailwinds Park, adding housing in the waterfront area, the opening of the Hyatt Regency Chesapeake Bay Resort on the banks of the Choptank River, and maintaining Cambridge’s deep-water port as a place for business—including marinas and boat repair operations, and retention of remaining seafood production operations such as J.M. Clayton on the Choptank waterfront and Kool Ice & Seafood located on Cambridge Creek.

Plans for developing the Waterfront should be continued and updated, with careful attention to the urban design

qualities of the projects that are proposed, maintaining the working port aspects, while simultaneously leveraging the presence of those assets, particularly around the working waterfront, to enhance the destination aspects of Cambridge, and the ability to maintain and strengthen public access to the Choptank River. To this end, it must be recognized that as currently programmed, with the exception of Visitors Center and the public boating landings, Sailwinds Park is configured more as a community park, and not as a regional attraction.

It is unfortunate that the Malkus Bridge where Route 50 crosses over the Choptank River is not tall enough for sailboats to sail under without dropping sail. Even so, the Cambridge port is the second deepest in the state after Baltimore, and offers significant opportunity. Waterfront projects in Augusta, Georgia, and Richmond, Virginia should be studied particularly closely for best practice examples in development, programming, and funding.

Recommendation Nine: That the revitalization efforts for Downtown and the Waterfront be integrated and synchronized.

The Waterfront and the Downtown are the two most significant defining elements within Cambridge (the third is High Street and the West End historic neighborhood). The opportunities will be best realized through consolidated planning. In order to integrate the two areas, special attention must be paid to the paths between Downtown and the Riverfront, particularly the areas along Trenton Street, Market Street, and Academy Street.

The Waterfront area needs a master plan, and ideally long term, the Dorchester General Hospital could relocate to Route 50, or elsewhere within Cambridge. Other redevelopment efforts are likely required, especially of the parking fronted shopping center on Academy Street. Currently this shopping center contributes to the separation of Downtown from the Waterfront, when instead the two areas need to be connected and integrated. It is important to look at other obstacles which may separate the two areas and look instead for ways in which these two currently separate districts can be further integrated and connected.

Recommendation 10: That any design and planning efforts for the waterfront on the Choptank River and Cambridge Creek maintain a commitment to public waterfront access.

A goodly amount of housing has been constructed along Cambridge Creek without ensuring that public access to the waterfront edge is maintained. Within the Chesapeake Bay region, what distinguishes Cambridge's Choptank River waterfront is the amount of publicly-owned space. This civic asset must be cherished and protected, not diminished by a piecemeal approach. Revitalization planning, and the resulting zoning and land use regulations must ensure that the civic qualities of the waterfront are maintained, enhanced, and protected.

Recommendation 11: The Cambridge Waterfront needs a District Management Plan comparable to the management plan developed for the Heritage Area. This plan should be coordinated with Downtown and Arts District planning efforts.

Below are a number of suggested areas to consider in expanding the place of the Choptank River Waterfront as an economic and cultural resource within Cambridge revitalization planning efforts:

- To better connect the Waterfront and the Downtown, the old railroad depot could be recaptured as a civic asset and used to house the Cambridge operations of the Harriet Tubman Museum and Education Center, currently located on Race Street. A railroad depot is a natural symbol from which to interpret the Underground Railroad;
- It should be of utmost priority that the Richardson Maritime Museum's development of a waterside museum be achieved, with a pier for the Skipjack Nathan on the waterfront;

- The development of a river tour attraction embarking from the Choptank River/Long Wharf should be pursued, perhaps in conjunction with the Choptank River Boat Company. Ideally, at least one boat could be based at Long Wharf, with regular stops between Long Wharf, a proposed Cabela's, the Hyatt Resort, and the Suicide Bridge Restaurant;
- If a hotel and conference center is developed on the Cambridge city waterfront, it should employ a maritime theme, in keeping with its location and the history of the waterfront;
- The visitor attraction aspects of the J.M. Clayton Seafood Company (and similar businesses) should be extended if at all possible;
- Support for aquaculture as an economic development strategy should be maintained (based on the example of Marinetics, Inc., and their successful cultivation of oysters) and extended.

Recommendation 12: In association with Chesapeake College, the University of Maryland, the University of Maryland Center for Environmental Sciences at Horn Point, the Chesapeake Bay Foundation, the Chesapeake Bay Gateways Network, the Chesapeake Bay Maritime Museum, the Richardson Maritime Museum, and other stakeholders, a one- and/or two-semester college level maritime education program could be developed, focused on the Chesapeake Bay, and based on Cambridge's Choptank River waterfront.

There are many programs devoted to the Chesapeake Bay, yet it is a surprise to discover that there are no coordinated college educational programs focused on the Bay, its history, sciences, and marine policy in a manner comparable to the Williams College-Mystic Seaport one-semester program offering courses on maritime history, literature, policy, and sciences. (The University of Maryland Center for Environmental Sciences program at Horn Point is a high-level graduate research program.) Why not mount such a program in Cambridge, which would allow easy access to other maritime assets in the region? Organizations such as Ocean Classroom, Semester at Sea, and programs of Baltimore's Living Classrooms Foundation are other organizations that could be approached to assist in the development of such a program.



Left: Billboard on Route 50 promoting the Waterside housing development. Middle: duck hunters returning to shore at the boat landing in Sailwinds Park. Right: Old Cambridge railroad depot on Trenton Street.

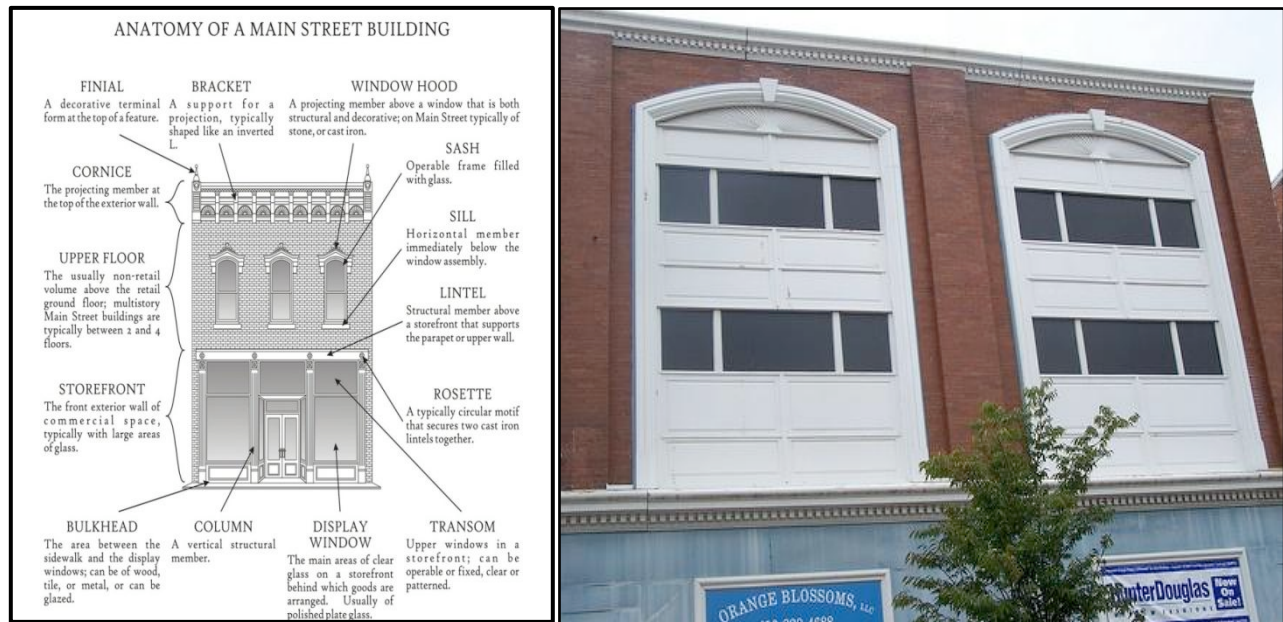


Left: Dorothy Megan paddleboat at Long Wharf, Choptank River Boat Company. Right: The Malkus Bridge on Route 50.

URBAN DESIGN ISSUES DOWNTOWN

Historic architecture, history, and authenticity are the defining characteristics of the core of Cambridge and comprise Downtown's competitive advantage compared to other retail centers located along Maryland's Route 50. Currently, Easton is a more successful commercial district, but Cambridge seemingly has better assets—more, larger and better buildings, direct water access fronting the Choptank River and Long Wharf, with marinas and a park on the waterfront.

Brick buildings dating from the 1880s to the 1920s typify the building stock in Downtown Cambridge. Historic buildings tend to have smaller footprints when compared to the kinds of sites occupied by today's national chain retailers. However, because of its historic role as the retail center for the county, and its proximity to an industrial area and former industrial uses, Cambridge possesses some large retail spaces (and infill opportunities), making it possible to secure larger footprints or expand.



Left: Image from the Illinois Main Street program. New retail construction and changes to historic buildings should follow traditional “retail anatomy” to achieve the best shopping experience in a commercial district, whether the district is oriented to “walk and shop” or “park and shop.” Right: covered upper story windows and overly simple signage on Race Street.

Focusing on culture and history is the core strategy for both the Main Street model of commercial district revitalization and cultural heritage tourism promotion efforts. Both strategies, which are reciprocal and the core of the approach employed by the study team, focus on the unique and authentic experiences within traditional towns, cities, and commercial districts, as a way to position distinctively a community in what is otherwise a brutally competitive and homogenized retail environment.

In order to capture the opportunities presented by the historic architecture of Downtown Cambridge, it is important that the buildings and architectural styles typical of the era of significance (1880-1920) be preserved, maintained, and extended when appropriate via infill construction, that signage is of uniformly high quality, and that new construction is compatible, complementary, and context-appropriate. This will extend the economic vitality and livability of the city, and strengthen Cambridge's competitive position within the region.

Recommendation 13: Ensure that historic preservation guidelines are adequately interpreted and enforced to ensure that building facades, setbacks, and signage, are architecturally accurate and strengthen the overall visual identity of the Downtown.

Business Signage. Business signs are key architectural elements and have a significant impact on the quality of the visual environment. Signs oriented to attracting the attention of drivers tend to be large, often of jarring colors. A great number of inappropriate signs quickly turn into visual pollution. At the same time, signs market businesses and are important to business success.

Signage in walking-based districts should be sized appropriately towards pedestrians, balancing business promotion objectives while at the same time enhancing visual interest and the quality of the built environment. This is especially true in historic commercial districts, where past sign technology and aesthetic standards were significantly different compared to today. Because signs have such significant impact, the study team recommends that high standards for signage be developed and included within the City’s zoning code and planning processes.

Recommendation 14: Create a common set of business signage standards for the entire City. Requirements should balance aesthetic concerns with the needs of businesses to best promote and market their goods and services.

Perception surveys indicate that crime or the fear of it shades attitudes about the shopping environment in Cambridge. In the past few years, historic lighting was installed Downtown, which has added a significant amount of lighting to the street. However, on a recent site visit to Cambridge during an evening Second Saturday event, one member of the study team observed how dark the streets can be at night, especially because many of the storefronts are currently empty.

Some communities have programs where images are projected onto buildings at night as part of temporary art exhibits. This is another type of program that could be included within the Arts District plan, as another way to deepen the way that people experience the arts and creativity within the city.

Also, as more retail businesses open, and as more establishments operate later into the evening, an increase in the number of lighted storefronts will reduce the perception of nighttime darkness. This should help achieve the balance of “just enough” light, rather than having too much or too little.

Recommendation 15: Greater efforts need to be directed towards improving street, sidewalk, and building lighting within Downtown Cambridge. One possibility would be for the Arts District program to develop a program for the architectural lighting of buildings, to add both beauty and light to the district.



Left: architectural lighting at the Arkansas Capital Building in Little Rock. Right: Holiday lighting of Anderson Hall at the University of the Arts in Philadelphia.

URBAN DESIGN ISSUES ON ROUTE 50

Before people travel further into the city or into Downtown, the perception of Cambridge is shaped by the aesthetic qualities of the built environment of the city—by the gateways and entryways into the City, and along the streets that bring people into Downtown.

These elements include buildings, business signs, parking lots, utility poles, streetlights, stoplights, street signs, plantings, grasses, and landscaped areas, and the maintenance of these elements (including the picking up of litter). Individual elements may be attractive or unattractive, but all contribute to the overall perception of the city. For the most part, the sum of these elements is unattractive, so that getting to Downtown is not a pleasing experience.

Adopting urban design standards for entryways into the Downtown. Traditional zoning regulations for new commercial construction stress orienting buildings to the automobile, putting the automobile front and center, with requirements for a great number of parking spaces and parking in front of the buildings.

A newer approach is that of the form-based code, which focuses upon character and aesthetic quality of areas and context—transcending the previous focus on minimum requirements for constructing particular kinds of building for particular uses on particular lots.

Downtown buildings were constructed during a different time period, when buildings were placed on lots in a manner that maximized lot coverage and oriented the building toward sidewalks and to pedestrians.



Left: A CVS store in Baltimore was constructed to the lot line, with parking in the rear. Although a front door was constructed, it is not in use, and main access to the building is from the rear of the building. Right: a typical shopping center with parking fronting the buildings and the street.

If zoning regulations were to be (re)created around the principle of creating quality experiences (for pedestrians), and to support transit, requirements likely would be much different from what they are today.

Downtown's design guidelines, based on the development principles of commercial districts from the late 1800s, are a good example to follow. These guidelines focus on producing a people-pleasing experience instead of accommodating automobiles, even though for the most part people drive to the Downtown. These guidelines include zero lot line building footprints and limits on requirements for on-site parking.

The cumulative effect of historic building practices produces the sense of being in an enclosed but outdoor room, with high quality sidewalks, street furniture, and public spaces, instead of a set of small buildings surrounded by large parking lots. This creates a place where people can walk instead of a sea of parking, yielding an experience

that is far more aesthetically pleasing. This produces a much different feel when compared to buildings fronted by large parking lots.

Recommendation 16: Ensure that the urban design code for Route 50 is focused on developing a better visual experience and environment, more comparable to how design requirements (zero setbacks, development to the lot line, permeable ground floors, parking in the back) in the commercial section of the Downtown have yielded a more attractive, pedestrian-friendly, experience.

Recommendation 17: For sites fronting Route 50, it is worth considering placement of utility infrastructure at the rear of buildings, installing historic replica streetlights, and upgrading street sign pole standards, in order to raise the quality of the aesthetic experience as people enter and travel through the City of Cambridge on this route, which is the primary entryway into the city and therefore the key touch point of Cambridge that is most likely to be experienced by people traveling through Cambridge to and from Washington and Baltimore.

Business Signage. Business signs are key architectural elements and have a significant impact on the quality of the visual environment. Signs oriented to attracting the attention of drivers tend to be large, with jarring colors. This is true of the signage on Route 50. A more attractive signage environment on Route 50 will improve the visual environment that is presented there, and would complement rather than detract from the “Cambridge experience” presented by this gateway and entryway corridor. Recommendation 14 above, recommends that a common set of business signage standards, based on signage standards for the historic district, should be developed for the entire city.

WAYFINDING AND CULTURAL HERITAGE INTERPRETATION SYSTEMS

Directional Signage

Many communities employ a hierarchy of signage types to provide information about places and history and commercial districts. Signage systems should serve multiple audiences—drivers as well as pedestrians. Signage for pedestrians orients visitors and assists their movement around and within a particular area. As shown in some images below, Washington, DC has an extensive and expanding system of signage explaining local history. The Anacostia Trails Heritage Area (ATHA) in Prince George's County Maryland has a similar system, using smaller signs and stanchions. ATHA and the City of Lancaster, Pennsylvania provide map-oriented signs which provide guidance for particular sub-districts, whereas Washington, DC does not offer a similar type of signage system for sub-districts and commercial districts.

A community should develop wayfinding systems that address three types of trips, “to; through; and around”:

1. How people get to communities;
2. How people pass through communities on their way to and from other places; and
3. How people get around your community, once they have arrived at their initial destination.

These systems should provide coordinated but different types of signage that are appropriate to the requirements of particular transportation modes: walking; bicycling; driving; and transit. For example, drivers need larger signs with larger type in order to be able to react in advance of turns and stops, while signage oriented to people on foot should be more appropriately sized for the built and street environment, and directed toward moving people to and from points of interest within a downtown or neighborhood and other places of interest.

A wayfinding signage program should help people get to: (1) the city from Route 50 and other places in the region; (2) Downtown; and (3) back and forth from places and destinations within the city, especially to and from Downtown. The latter is assisted by the provision of map signs to orient people to the city (and region).

Recommendation 18: That the City of Cambridge, with the participation of the Heart of Chesapeake Country Heritage Area and County and State transportation officials, develop a wayfinding signage program, for the purpose of improving the visitor experience, to assist people in getting to and around the City of Cambridge, with a special focus on Downtown, the Waterfront, and routes to and from the Hyatt Regency Chesapeake Bay Resort.



Left: Capitol Hill in Washington, DC. Middle: An Anacostia Trails Heritage Area sign in Hyattsville, Maryland. Right: Baltimore.



Left: A type of map sign in Alexandria, Virginia. Right: A map sign in Petersburg, Virginia incorporates heritage information.

Conditions for walking in Cambridge—sidewalks—are excellent, although block by block directory signage would be helpful. Without such signage, walking to multiple destinations in a single trip may be discouraged. The downtown kiosk is a missed opportunity for the inclusion of directory signage, which could also be posted throughout the Downtown.

Recommendation 19: That a more focused directional signage program be created for Downtown Cambridge, including the Waterfront.



Left and center: directional and interpretational signage (design proofs) created by a member of the study team for a commercial district in Washington, DC. Right: information kiosk, Downtown Cambridge.

Parking Signage

The network of regional and local roads serving Downtown is excellent and there is an ample inventory of free street parking. Roaming taxi service and taxi stands aren't present Downtown, but taxi service is made available by dispatch.

Likely there is a more than adequate inventory of on-street parking spaces and there appears to be a fair amount of off-street parking as well. Still, surveys and interviews with consumers and stakeholders indicate that there is the perception that parking availability is an issue, although the study team would argue that respondents more accustomed to automobile-oriented shopping options feel that anything less than a sea of parking lots is insufficient. This could also be reaction to having to parallel park, compared to a traditional shopping center parking configuration. One advantage of municipal and/or shared commercial off-street parking lots Downtown is that they help meet the demands of people who are more comfortable parking in a lot rather than on the street.

While information about parking options is already included in promotional brochures produced by Cambridge Main Street, the study team believes that expanding the amount and usefulness of signage indicating where to park

will better manage people's perceptions and expectations about parking availability.

Recommendation 20: Coordinate and expand the signage denoting parking options available downtown.



Left: Parking sign using the familiar “blue” color denoting “services” for the Virginia Museum of the Fine Arts in Richmond. Middle: Central Market Parking sign, Lancaster, Pennsylvania. Right: Parking sign in Cambridge.



Left: directional signage on Market Street, Cambridge. Middle: tourist information computer kiosk on Race Street. Right: Underground Railroad interpretational sign at the Dorchester County Courthouse.

Cultural Heritage Interpretation

It is the opinion of the study team that the historic preservation and cultural heritage qualities of Cambridge should be more strongly emphasized to better promote those qualities that identify the City—Cambridge has a distinguished history going back to the late 1600s—from typical homogeneous retail shopping centers, and to increase the awareness and respect of Downtown Cambridge on the part of County residents and visitors who may otherwise be unfamiliar with the historic district.

Furthermore, millions of people travel through the City of Cambridge each year on their way to and from Ocean City, without knowing much about where they are when they go through Cambridge.

There are a variety of signage systems being developed within the region, involving various stakeholders including the Heart of Chesapeake Country Heritage Area, the National Park Service, local organizations, and the State Highway Administration. The study team suggests that these programs be better coordinated and integrated.

By marking and providing information about important sites, people will be informed in a direct fashion that Cambridge is replete with valuable cultural assets that are worth knowing about, and they will have a better sense for the importance and value of what is present downtown and throughout the city, making them more comfortable and aware, and interested in spending more time exploring the city.

Recommendation 21: A more coordinated heritage interpretation and wayfinding signage system should be developed, linking Downtown, neighborhoods, the waterfront, the Choptank River, the Hyatt Resort, and other regional cultural and natural assets.

Washington DC has created a history trails signage program that is a good model for any community. The trail signs are produced by a local heritage organization through a contract with the DC Department of Transportation, utilizing federal highway funds. The creation of each trail includes the development of a high quality brochure using the same design scheme, with information from all of the signs. This supports the trail while providing another way to consume the same information and leverage the work performed to create the trail.

Heritage interpretation sign systems can codify and interpret cultural heritage for new and nontraditional audiences. This is particularly important because if important places and events aren't highlighted and explained, then people will not be alerted to what is important and why.

Among others, Portland, Oregon, Vancouver, BC, Pittsburgh, and Petersburg, Virginia utilize street signage to identify neighborhoods and historic districts. This is an excellent way to identify sub-areas within a city, or of areas that are important to a community's history and culture. It is an especially effective technique for identifying and communicating the value of place(s) to people who are unfamiliar with a community.

The addition of a street sign marking system that distinguishes neighborhoods could help orient visitors and would be consistent with the goal of defining and highlighting community character areas within the City of Cambridge Comprehensive Plan.



Left: Anacostia Trails Heritage Area narrative sign in Hyattsville. Middle: This kiosk in Downtown Petersburg, Virginia has 8 panels covering various aspects of the City's story, complemented by additional interpretative panels mounted on the stoop surrounding the kiosk. Right: historical marker in front of Petersburg's City Hall.

A communications plan should be developed that better organizes the delivery of information about the heritage and cultural resources of Cambridge. The creation of this plan should be coordinated with other stakeholders and partners including the City of Cambridge, the Heart of Chesapeake Country Heritage Area, the West End Civic Association, the Dorchester County Historical Society, and Dorchester County.

Stakeholders should endeavor to develop a coordinated system of cultural resources interpretation throughout Dorchester County.

Deliverables should include various media and finished pieces, including:

- a set of "history trail" markers for installation Downtown (and elsewhere in the City and County) to highlight and communicate the history of this area for current and new audiences, without people having to make an extraordinary effort to obtain the information;
- in conjunction with the creation of a history trail, the Downtown Walking Tour brochure should be revised and reprinted (with higher production values);
- companion information should be made available on the Internet in multiple forms including photo-based tours, printable documents, podcasts, etc.;
- local historic markers attached to important buildings;
- narrative boards and a portable display/booth, for use at special events and other venues;
- building tours that include stops at buildings in the commercial district, and when house tours occur, Downtown upper story housing should be included and ideally, an end of the day reception could be held Downtown, with foods provided by Downtown restaurants.



Left: Street sign in Portland, Oregon is topped with an identifying sign for the Alphabet Historic District. Middle: distinctive street signage and street lights recognize Chinese heritage in Vancouver, BC. Right: In historic districts, Petersburg's street signs have distinctive pole standards and surrounds and are colored differently (red, blue, green, maroon, etc.) depending on the historic district in which they are located.



Left and center: interpretational signs in Washington, DC. Right: The Brunswick Landmarks Foundation (Georgia) produces a Driving Tour publication, guiding people around the Old Town Historic District, with signs marking each stop on the tour.

Maritime Heritage Interpretation

As discussed above, the Waterfront is a key revitalization opportunity for the city, and the eventual relocation of the Richardson Maritime Museum to the waterfront will help realize this opportunity. Consideration of extending the museum conceptually to include exhibits on local and marine history as part of a wider range of waterfront improvements should be a keystone of the Waterfront Revitalization agenda. (As suggested above, the Richardson Museum could serve as the presenting institution for a Chesapeake Bay themed academic program.)

Dorchester County is known for its rivers, coastal wetlands, and shorelines, and the history of the Chesapeake shapes the county, city, and region. Furthermore, sustainability, climate change and global warming are high interest issues today. An interpretive program focused on the environment, waterfront, and marine life issues may have wider appeal beyond Cambridge, and the development of such a program could be considered as part of a more detailed study in the future. Some of this kind of interpretation is already provided within Sailwinds Park.

The interpretation of this story could be told along the entire Cambridge waterfront, as the way to position and connect the waterfront and Downtown. Richmond's Canal Walk and the Riverwalk in Augusta, Georgia provide examples of how this can be done.

Among others, Maine, the Cayman Islands, New Jersey, and the Florida Gulf Coast offer maritime heritage trail programs, linking up a great number and variety of cultural resources, ranging from lighthouses to ports and communities. The Captain John Smith Water Trail in Maryland and Virginia is another example of this concept.

The creation of a land-based Maritime Heritage Trail is an opportunity that could in fact be extended far beyond Cambridge and Dorchester County, as part of a broader program focusing on the heritage of the Eastern Shore and the Chesapeake Bay region, comparable to how Maryland and Virginia have developed Civil War history trails that extend across and connect each state around their shared history concerning the Civil War.



Regional-state heritage trail directional signage from New Jersey, Virginia, and Maryland.

Recommendation 22: To tie together activities on the Waterfront, a Maritime Heritage Trail could be created, as a way to link and interpret three of the Heritage Area's interpretative themes: Chesapeake Landscapes and Outdoor Adventure; Maritime Life; and History, Architecture, and Artifacts. This signage system could be extended throughout the Heart of Chesapeake Country Historic Area and Dorchester County.

LODGING AND ACCOMMODATIONS

Addressing the provision of accommodations in Cambridge and Dorchester County was outside of the scope of this study. Still, questions could not help but come up during the course of the study, during site visits and interviews. At this time, the study team believes that there is a goodly supply of rooms at present, although as the perception and quality of the experience provided by Cambridge improves, this will increase demand for a wider variety of types of lodging experiences.

Hotels and Motels. The provision of accommodations within a community has nuances that are not always considered. The type and quality of the hotel brands that are present says things about the market and how the community is perceived. This was shown jokingly in the movie *Total Recall* when a Best Western brand was displayed on a hotel located in a low income area, while Hilton Hotels was the brand pictured in the more upscale precincts of the Planet Mars.

Dorchester County has a number of hotel and motel properties and most are in the mid-price to budget category, with the exception of the Hyatt Regency Chesapeake Bay Resort. However, the lower cost properties are most visible along Route 50, which is the major gateway into and through the city, contributing to a perception that Cambridge offers a limited array of hotel-motel accommodations, making it more difficult to market to travelers seeking different quality points. The City Economic Development Department needs to consider this issue in terms of how it shapes perceptions of the city. Partly, it may be able to be addressed by developing more prominent (but still tasteful) signage and marketing at the entryway of the Hyatt Resort.

Waterfront Hotel and Conference Center: The Waterfront charrette raised the idea of a waterfront hotel and conference center, which has long been desired. At the present time, irrespective of current market conditions for real estate and hotel development, demand for a large lodging property at this location is limited, especially given the close proximity and level of public investment made in the nearby Hyatt Resort although quality community conference facilities in the Downtown area are probably a desirable and needed amenity.

Boutique Waterfront Inn. It is the sense of the study team that a Boutique Inn, with a theme focused around the maritime history of Cambridge, the Choptank River, and the Chesapeake Bay (oystering and crabbing, marine archaeology, etc.) would be a complementary offering on the Waterfront and attractive to those interested in staying Downtown, without being unreasonably competitive with the Hyatt property. Such an inn would likely be small, and would also serve guests of the marinas, and like many distinctive inn properties around the country, the quality and uniqueness of the experience at such an Inn would generate a market and revenue stream that would not likely be identified when conducting a traditional market study for a hotel property.

Boutique Inn Downtown, Focused on the Arts. As discussed above, the study team believes (although a feasibility study was not conducted) that demand for a boutique inn downtown can be sustained, if the property is designed and marketed as a key anchor of the Arts, Culture, and Entertainment District.

Bed and Breakfast Facilities. There are three bed and breakfasts operating in Downtown Cambridge at present, running at relatively high occupancy rates. As the destination qualities of Cambridge improve, particularly in the retail and waterfront districts, there will be more capacity for B&B properties. Furthermore, operation as a B&B is an ingenious way to adaptively reuse some of the extremely large historic Victorian houses located in the West End.

APPENDIX A — MARINA ECONOMIC IMPACT DATA

Analysis conducted using the on-line Boating Economic Impact Model developed by
Recreation Marine Research Center
Michigan State University

The On-line Boating Economic Impact Model is sponsored by the Association of Marina Industries, Great Lakes Commission, U.S. Coast Guard and the National Marine Manufacturers Association.

Executive Summary

This report provides estimates of the economic impacts of the Generations III, Municipal Yacht Basin, and Hyatt Regency Chesapeake Bay Resort marinas located in CAMBRIDGE, MARYLAND. (It does not include estimates based on private slips located at houses and condominiums located within the city.) The marinas produce direct and indirect revenues for many different types of businesses (e.g., retail, restaurants) in the local area. It also contributes to the visual character of the waterfront and contributes to the community's quality of life. Unfortunately, the economic contributions of marinas like this often go unrecognized or are undervalued. This report provides estimates of the direct and indirect economic impacts associated with the spending by the owners of boats that rent seasonal and annual slips, and the direct spending by transient boaters (tourists) staying at the various marinas in Cambridge.

Economic impacts are estimated using a boater spending and impact model. Boater spending averages on a per day basis for trip spending and per boat basis for annual craft spending are adapted from spending profiles developed from two different national boater surveys conducted by the Recreation Marine Research Center (RMRC) at Michigan State University in 2005. Estimates of annual craft spending for boats kept at marinas are taken from a national survey of more than 12,500 boaters conducted in 2005 and 2006.

Annual craft spending averages were price adjusted to 2007 using consumer price indices for each spending category. Annual craft spending includes storage (during the boat season), insurance, taxes, replacement outboard motors, trailers, fuel, repairs & marine services and accessories. Loan payments for the year are included, but purchases of new boats are not. Since most boats, trailers, motors and other equipment purchased by boaters are not manufactured in the local area, only the retail and wholesale margins on these purchases are included as local impacts.

Trip spending estimates, including what boaters spend on groceries, lodging, entertainment and restaurants, came from a 2006 national survey of more than 6,000 boaters that gathered information about more than 13,000 boating trips. Trip spending includes what boaters spend on boating trips for fuel, groceries, lodging, entertainment, and restaurants. Spending averages were price inflated to 2007. Spending profiles were developed for different size and type boats in different regions of the country. The craft and trip spending averages used here are for boats kept at marinas in the Mid Atlantic Region of the United States.

The spending averages are applied to the number of slip renters and transient boaters. Distinct spending averages are used for power and sail boats divided into two size classes. Spending is divided into 12 trip spending categories and eight craft spending categories.

Total spending by these boaters who rent slips seasonally or annually or are transient renters is applied to a set of economic ratios and multipliers that reflect the local economy. The impact region is defined to include roughly a 30 mile radius of the marina. Economic ratios and multipliers were estimated with the IMPLAN input-output modeling system. Because the size of multipliers differ depending on the size and nature (e.g., types of businesses) of the local economy distinct sets of multipliers were developed for rural (population less than 100,000), small metro (populations 100,000-500,000), and larger metro regions (population over 500,000). Multipliers representing "Rural Area" were selected for this analysis. Economic ratios translate the spending into wages and salaries and jobs supported by the boater spending. Multipliers estimate the secondary effects as the spending flows through the local economy. Total effects include the (1) direct sales, jobs and income in firms selling directly to boaters, (2) indirect effects in firms that supply goods and services to boating businesses, and (3) induced effects resulting from household spending of income earned directly or indirectly from boater spending.

A total of 305 boats were kept at the marinas in 2007. This includes 210 power boats ranging from 16' to more than 40' and 95 sailboats. It is estimated that the 305 seasonal/annual slip renters will take their boats out on the water a total of 10,294 days in 2007. The average number of boating days per boat is 29 days. The marina rented slips to transient boaters a total of 1,400 nights in 2007.

The boaters who rent slips either for the season or annually contribute to the local and state economies through spending on the upkeep and maintenance of their craft and also spending on their boating trips. Boaters who keep their boats in slips will spend about \$2,522 annually on craft upkeep and maintenance not counting fuel. This spending is broken down as follows: 25% on slip/storage fees, 30% to loan payments including principal and interest, 21% for repairs, 7% for insurance, and 14% for accessories. Combining trip and craft spending, a typical boat spends \$713 per year on boating trips and \$1,479 per year on craft-related expenses.

Total trip spending by these boats kept at the marina is estimated to be \$1 million, with 16% spent on marina services, 22% on restaurants and bars, 18% groceries, 7% auto fuel and 27% boat fuel.

The direct economic effects on the local economy of this spending are 37 jobs⁷, \$0.7 million in labor income and \$1.1 million in value added⁸. The marina's non-labor operating costs such as purchases of supplies and services from other

⁷ Jobs are not full time equivalents, but include full time and part time jobs. Seasonal positions are adjusted to an annual basis, e.g., two jobs for six months equates to one job on an annual basis. Labor income includes wages and salaries, payroll benefits and income of sole proprietors. Value added includes labor income as well as profits and rents and sales taxes and other indirect business taxes.

⁸ Value added is the income accruing to households in the region plus rents and profits of businesses and indirect business taxes. As the name implies, it is the net value added to the region's economy. For example, the value added by a marina includes wages and salaries paid to employees, their payroll benefits, profits of the marina, and sales and other indirect business taxes.

firms are not included as value added by the marina. Direct effects cover the impacts in businesses selling goods and services directly to these boaters. This includes 18 jobs in marina services, 7 jobs in restaurants and bars, and 6 jobs in retail stores.

Including secondary effects, the total impact on the local economy is 45 jobs, \$0.9 million in labor income and \$1.4 million in value added.

Table 1 - Number of Boats Kept at the Marina and Their Estimated Number of Boating Days

Boat Type and Size	Number of Boats	Average Days Per Boat	Total Boat Days
Power <40'	200	28	5,688
Power 40'+	10	30	305
Sail <40'	75	28	2,125
Sail 40'+	20	39	776
Transient Power	-	-	1,000
Transient Sail	-	-	400
Total	305	29	10,294

Table 2 - Total Spending on Boat Trips by Boats Kept at the Marina (\$ Thousands)

Category	Total	Percentage
Lodging	16.2	1.3%
Marina services	194.5	16.0%
Restaurant	266.2	21.9%
Groceries	215.9	17.7%
Boat fuel	329.3	27.1%
Auto fuel	84.0	6.9%
Repair & Maintenance	-	-
Marine supplies	-	-
Recreation & Entertainment	43.0	3.5%
Shopping	46.2	3.8%
Other services	-	-
Other goods	21.3	1.7%
Total	1,216.4	100%

Table 3 – Total Annual Craft Spending by Boats Kept at the Marina (\$ Thousands)

Category	Total	Percentage
Slip	624.5	24.8%
Loan Payments	746.5	29.6%
Motors	7.3	0.3%
Trailers	3.2	0.1%
Insurance	181.6	7.2%
Repairs	518.9	20.6%
Accessories	355.8	14.1%
Taxes	84.4	3.3%
Total	2,522.2	100%

Table 4 – Economic Impacts of Trips Spending and Annual Craft Spending by Boats Kept at the Marina

	Trip Spending	Annual Craft Spending	Total
Direct Effects			
Sales (\$ Thousands)	689.7	1,311.4	2,001.1
Jobs	15.4	21.5	36.9
Labor Income (\$ Thousands)	262.7	404.9	667.6
Value Added (\$ Thousands)	359.9	721.6	1,081.6
Total Effects			
Sales (\$ Thousands)	932.5	1,718.8	2,651.3
Jobs	18.6	26.9	45.5
Labor Income (\$ Thousands)	334.9	530.6	865.5
Value Added (\$ Thousands)	488.6	939.7	1,428.4

Table 5 - Economic Impact of both Craft and Trips Spending by Boats Kept at the Marina

Sector/Spending category	Sales (\$ Thousands)	Jobs	Labor Income (\$ Thousands)	Value Added (\$ Thousands)
Direct Effects				
Lodging	16.2	0.4	7.1	11.5
Marina Services	819.0	17.9	297.3	497.1
Restaurant	266.2	6.9	102.5	115.5
Recreation & Entertainment	43.0	0.9	15.6	26.1
Repair & Maintenance	518.9	3.7	99.6	228.3
Insurance & Credit	23.0	0.3	10.7	19.6
Gas Service	92.1	1.2	34.6	44.9
Other Retail Trade	222.7	5.6	100.2	138.5
Wholesale Trade	-	-	-	-
Other Local Production of Goods	-	-	-	-
Total Direct Effects	2,001.1	36.9	667.6	1,081.6
Secondary Effects	650.2	8.5	197.9	346.8
Total Effects	2,651.3	45.5	865.5	1,428.4

Spending Profiles by Boats Kept at the Marina

Table 1 - Average Spending on Boat Trips by Boats Kept at the Marina (\$ Per Boat Day)

Category	Boat Type and Size					
	Power <40'	Power 40'+	Sail <40'	Sail 40'+	Transient Power	Transient Sail
Lodging	0.9	0.3	1.5	2.2	4.4	4.3
Marina services	17.3	25.6	10.3	18.3	40.8	28.5
Restaurant	24.4	36.7	16.4	30.7	44.1	33.6
Groceries	19.9	32.6	14.7	24.6	31.5	27.4
Boat fuel	41.1	61.6	3.6	8.0	59.5	8.4
Auto fuel	9.2	8.6	5.8	6.6	9.2	5.9
Repair & Maintenance	-	-	-	-	-	-
Marine supplies	-	-	-	-	-	-
Recreation & Entertainment	3.7	4.4	2.0	6.6	8.6	6.5
Shopping	2.9	6.3	2.9	5.2	12.9	11.6
Other services	-	-	-	-	-	-
Other goods	2.5	1.8	2.0	2.9	-	-
Total	121.9	177.9	59.2	105.1	211.0	126.2

**Table 2 - Average Spending on Annual Craft Spending by Boats Kept at the Marina
(\$ Per Boat Per Year)**

Category	Boat Type and Size			
	Power <40'	Power 40'+	Sail <40'	Sail 40'+
Slip	1,654.7	4,699.8	2,262.0	3,845.1
Loan Payments	1,987.6	11,972.9	1,480.5	5,908.9
Motors	28.9	38.9	11.3	13.8
Trailers	12.6	8.6	6.7	6.1
Insurance	490.1	2,192.2	462.4	1,349.6
Repairs	1,365.5	5,374.7	1,619.0	3,530.9
Accessories	820.4	4,292.2	1,331.6	2,447.7
Taxes	236.4	1,875.7	85.5	596.2
Total	6,596.2	30,455.0	7,259.0	17,698.3

Estimates of Total Spending by Boats Kept at the Marina

Table 1 - Total Spending on Boat Trip by Boats Kept at the Marina (\$ Thousands)

Category	Boat Type and Size						Total	Percentage
	Power <40'	Power 40'+	Sail <40'	Sail 40'+	Transient Power	Transient Sail		
Lodging	5.1	0.1	3.2	1.7	4.4	1.7	16.2	1%
Marina services	98.4	7.8	21.9	14.2	40.8	11.4	194.5	16%
Restaurant	138.8	11.2	34.9	23.8	44.1	13.4	266.2	22%
Groceries	113.2	9.9	31.2	19.1	31.5	11.0	215.9	18%
Boat fuel	233.8	18.8	7.7	6.2	59.5	3.4	329.3	27%
Auto fuel	52.3	2.6	12.3	5.1	9.2	2.4	84.0	7%
Repair & Maintenance	-	-	-	-	-	-	-	-
Marine supplies	-	-	-	-	-	-	-	-
Recreation & Entertainment	21.0	1.3	4.3	5.1	8.6	2.6	43.0	4%
Shopping	16.5	1.9	6.2	4.0	12.9	4.6	46.2	4%
Other services	-	-	-	-	-	-	-	-
Other goods	14.2	0.5	4.3	2.3	-	-	21.3	2%
Total	693.3	54.2	125.8	81.5	211.0	50.5	1,216.4	100%

**Table 2 - Total Spending on Average Annual Craft Spending by Boats Kept at the Marina
(\$ Thousands)**

Category	Boat Type and Size				Total	Percentage
	Power <40'	Power 40'+	Sail <40'	Sail 40'+		
Slip	330.9	47.0	169.7	76.9	624.5	25%
Loan Payments	397.5	119.7	111.0	118.2	746.5	30%
Motors	5.8	0.4	0.8	0.3	7.3	0%
Trailers	2.5	0.1	0.5	0.1	3.2	0%
Insurance	98.0	21.9	34.7	27.0	181.6	7%
Repairs	273.1	53.7	121.4	70.6	518.9	21%
Accessories	164.1	42.9	99.9	49.0	355.8	14%
Taxes	47.3	18.8	6.4	11.9	84.4	3%
Total	1,386.7	108.5	251.6	163.1	2,522.2	100%

Table 3 - Numbers of Boats, Boating Days and Craft and Trip Spending by Different Size and Type Boats Kept at the Marina

Category	Boat Type and Size						Total
	Power <40'	Power 40'+	Sail <40'	Sail 40'+	Transient Power	Transient Sail	
Number of boats	200	10	75	20	-	-	305
Annual craft spending per boat	\$6,596	\$30,455	\$7,259	\$17,698	-	-	\$1,479
Total craft spending (\$ Thousands)	\$1,319	\$305	\$544	\$354	-	-	\$2,522
Average days per boat	28	30	28	39	-	-	29
Total boat days	5,688	305	2,125	776	1,000	400	10,294
Average trip spending per boat day	\$122	\$178	\$59	\$105	\$211	\$126	\$118
Total trip spending per boat per year	\$3,467	\$5,423	\$1,677	\$4,077	\$211	\$126	\$713
Total trip spending (\$ Thousands)	\$693	\$54	\$126	\$82	\$211	\$50	\$1,216
Total craft & trip spending per boat per year	\$10,063	\$35,878	\$8,936	\$21,775	\$211	\$126	\$2,193
Total craft & trip spending (\$ Thousands)	\$2,013	\$359	\$670	\$436	\$211	\$50	\$3,739
Pct of spending by boats	54%	10%	18%	12%	6%	1%	100%
Pct of boats	12%	1%	4%	1%	59%	23%	100%
Pct of boat days by boats	55%	3%	21%	8%	10%	4%	100%
Pct of spending on trips by boats	34%	15%	19%	19%	100%	100%	33%

Economic Impact Result/Tables

Table 1 - Economic Impact of Trips Spending by Boats Kept at the Marina

Sector/Spending category	Sales (\$ Thousands)	Jobs	Labor Income (\$ Thousands)	Value Added (\$ Thousands)
Direct Effects				
Lodging	16.2	0.4	7.1	11.5
Marina Services	194.5	4.2	70.6	118.1
Restaurant	266.2	6.9	102.5	115.5
Recreation & Entertainment	43.0	0.9	15.6	26.1
Repair & Maintenance	-	-	-	-
Grocery Stores (Margin & Sales)	54.6	1.2	21.6	28.8
Gas Service Stations (Margin & Sales)	92.1	1.2	34.6	44.9
Sporting Goods/Equipment Retail Margins	-	-	-	-
Other Retail Trade (Margins & Sales)	23.1	0.6	10.8	15.1
Wholesale Trade (Margins & Sales)	-	-	-	-
Local Production of Goods	-	-	-	-
Total Direct Effects	689.7	15.4	262.7	359.9
Secondary Effects	242.7	3.2	72.2	128.7
Total Effects	932.5	18.6	334.9	488.6

Table 2 - Economic Impact of Annual Craft Spending by Boats Kept at the Marina

Sector/Spending category	Sales (\$ Thousands)	Jobs	Labor Income (\$ Thousands)	Value Added (\$ Thousands)
Direct Effects				
Boat Manufacture	-	-	-	-
Slip	624.5	13.6	226.7	379.1
Repairs	518.9	3.7	99.6	228.3
Insurance	18.2	0.3	8.7	15.8
Credit Intermediaries	4.9	0.0	2.0	3.8
Retail Margins	145.0	3.8	67.8	94.6
Wholesale Trade	-	-	-	-
Manufacture: Motors, Trailers, Accessories	-	-	-	-
Total Direct Effects	1,311.4	21.5	404.9	721.6
Secondary Effects	407.5	5.4	125.8	218.1
Total Effects	1,718.8	26.9	530.6	939.7

Table 3 - Economic Impact of both Trip and Annual Craft Spending by Boats Kept at the Marina

Sector/Spending category	Sales (\$ Thousands)	Jobs	Labor Income (\$ Thousands)	Value Added (\$ Thousands)
Direct Effects				
Lodging	16.2	0.4	7.1	11.5
Marina Services	819.0	17.9	297.3	497.1
Restaurant	266.2	6.9	102.5	115.5
Recreation & Entertainment	43.0	0.9	15.6	26.1
Repair & Maintenance	518.9	3.7	99.6	228.3
Insurance & Credit	23.0	0.3	10.7	19.6
Gas Service	92.1	1.2	34.6	44.9
Other Retail Trade	222.7	5.6	100.2	138.5
Wholesale Trade	-	-	-	-
Other Local Production of Goods	-	-	-	-
Total Direct Effects	2,001.1	36.9	667.6	1,081.6
Secondary Effects	650.2	8.5	197.9	346.8
Total Effects	2,651.3	45.5	865.5	1,428.4