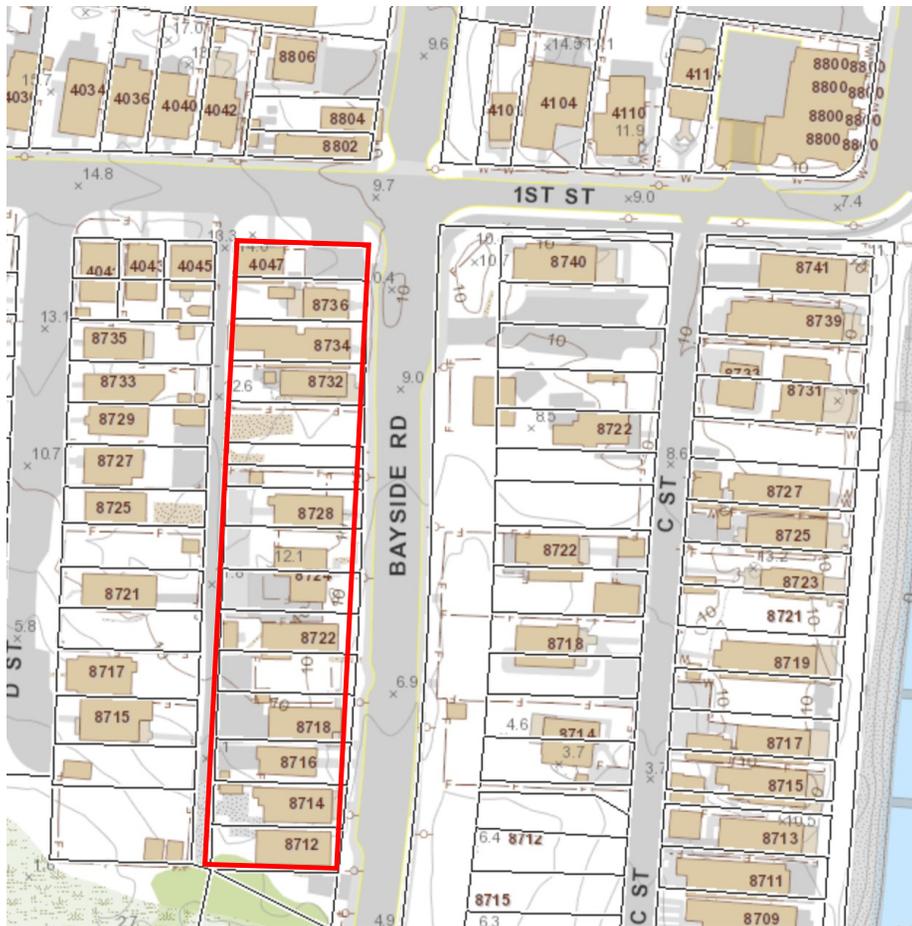


Economic Development Committee Meeting

January 22, 2018

The slides that follow were part of a presentation made by Town Planner Christopher Jakubiak at meeting of the Chesapeake Beach Economic Development Committee.

North End



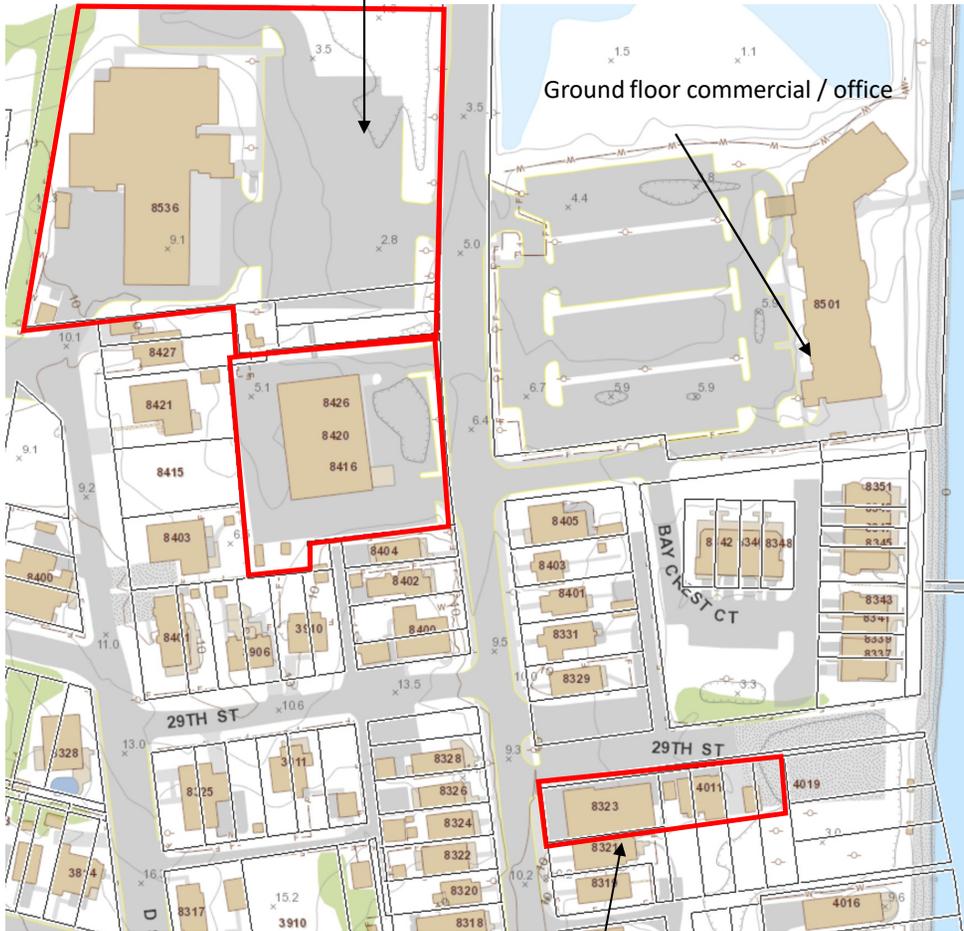
- Primary Character: Residential, small lot
- Parking: One side of street only
- Development: Requires demolition and lot consolidation
- Positioned best for: Small office, coffee shop, live/work, artisan
- Considerations:
 - Connect alley to street
 - Parking lot
 - Commercial use on east side
 - Development of vacant parcels at 31st would support commercial potential

Beach Gateway



Primary Character:	Commercial, pad site,
Parking:	On-site
Development:	Demolition & rebuild or intensification
Positioned for:	Community retail and services, medical/dental urgent care, restaurant, mix-use
Considerations:	Prime for redevelopment Target area for streetscape improvements: sidewalk, landscaping and street trees to create sense of place Highly accessible

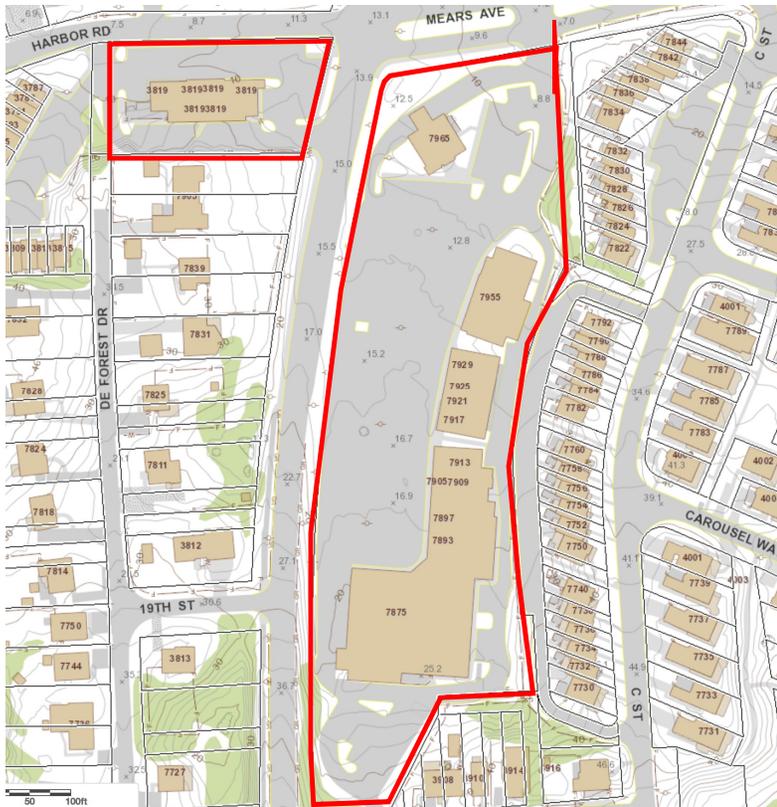
Commercial District, but in use as fire station



Non-Conforming commercial in RV District C.N. Jakubiak, Jan. 22, 2018



- Primary Character: Commercial shopping plaza and non-conforming sit-down restaurant
- Parking: On-site
- Considerations: New restaurant demonstrated strength in the area for dining out



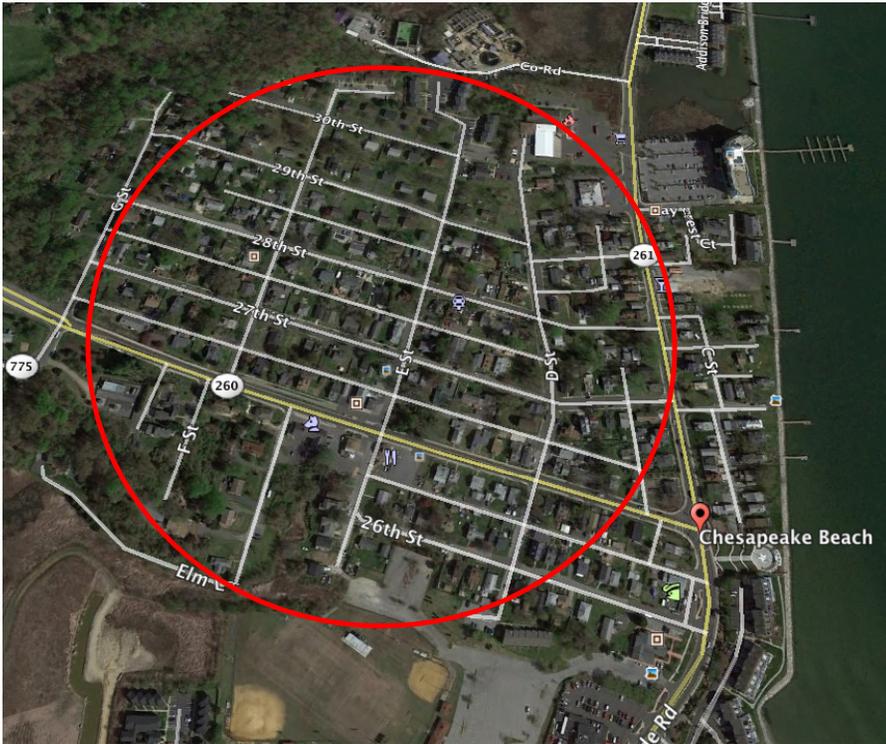
- Primary Character: Shopping Center
- Parking: On-site but limited
- Development: Existing use, possible intensification
- Positioned for: Community shopping center
- Considerations: Grocery is anchor

The Hill / Uptown



Primary Character:	Disoriented, lacks unified character
Parking:	On-site
Development:	Existing use, redevelopment, infill intensification, lot consolidation
Positioned for:	Specialized district, mixed use
Considerations:	Gateway from south Needs unifying character elements and streetscape Potential for Mix with residential Uniquely positioned to benefit from views to Bay

Residential Village District



Primary Character: Residential Neighborhood

Zoning Ordinance allows for certain commercial uses including:

- Day Care centers, nursing homes, assisted living
- Studios for art, music, dance, similar
- Art galleries
- Professional and business offices
- Medical/dental office or clinic
- Retail shops: bookstores, florists, gifts (Lots w/ frontage on MD 261 only)
- Personal services: barbershops, salons, (Lots w/ frontage on MD 261 only)
- Bed and breakfasts

Maritime District

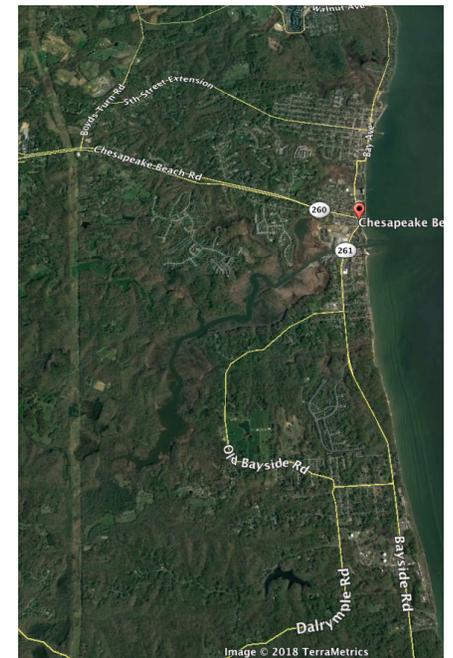


Primary Character: Tourism, Recreation, Waterfront

Zoning Ordinance allows for a broad set of commercial uses, restaurants, working waterfront and marina uses, hotels, dense residential development

“Twin Beaches” + Summer City & Environs Population

	Population	Households
Twin Beaches:	7,900	3,170
Plus Summer City & Environs:	850 – 1,000	300-350
Estimated Primary Market Area:	8,850	3,500
Median Household Income:	\$97,200 (Calvert County)	
Aggregate Annual Income:	\$305,000,000	



Estimating Market Demand for Primary Market Area

Category	Income Potential	% HH Exp	Supportable Sales	Sales / sf	Supportable Space
Food Away From Home	\$305,252,500	5.5%	\$16,788,888	350	47,968
Alcoholic Beverages	\$305,252,500	0.8%	\$2,442,020	400	6,105
Food at Home	\$305,252,500	7.1%	\$21,672,928	490	44,230
Other Speciality Retail	\$305,252,500	2.0%	\$6,105,050	500	12,210
Entertainment (admissions, toys, hobbies)	\$305,252,500	5.1%	\$15,567,878	400	38,920
Personal Care Products and Services	\$305,252,500	1.2%	\$3,663,030	500	7,326
Household Furnishing, Equipment	\$305,252,500	3.2%	\$9,768,080	400	24,420

Source of expenditure data is U.S. Bureau of Labor Statistics, Consumer Expenditure Survey, June 2015 - April 2016.

Retailing: 12 Establishments in Chesapeake Beach

- Convenience: Gifts: 2
- Beer & Wine: 2
- Grocery
- Gas Station with Convenience store
- Convenience Store
- Pharmacy
- Pet Supply
- Tackle
- Wireless devices and accessories
- Antiques

Plus: Hair salon, Nail salon

North Beach: wine and spirits, candy, pet grooming, gifts, art gallery, ice cream parlor (2), antiques, apparel, appliances, salons.

Boys Turn: Hardware

Dunkirk. General merchandize, grocery, home goods, (paint, carpet, mattress), jewelry, auto parts, cards, gifts, flowers, vapes, pet supplies, liquors, salons, convenience, gas.

Note: Dunkirk has become a center of medical, dental and vision professional services.

Thoughts on Retail Demand

- Retail Leakage in “Food at Home” category; about ½ of potential sales leak to Dunkirk or elsewhere
- Retail Leakage in “Household Furnishings, Equipment” to Dunkirk and elsewhere. (Can assume same for apparel).
- \$15.5 million annual expenditure potential for entertainment...
- Demand for “Specialized Retail” largely satisfied in the local market area
- Demand for “Food Away from Home” and “Alcoholic Beverages” largely met in local market area
- Demand for “Personal Care Products and Services” largely met through CVS and local salons

Tourism

- Visitor spending adds to local retail demand.
- Visitors to Calvert County (2013): 245.9 Overnights and 297.4 Day
- Annual Visitor Spending in Calvert County (2013) in \$millions

Lodging	Food & Bev.	Retail	Recreation	Transpot.	Second Hom	Total
17.9	29.5	16.3	18.6	21.9	23.4	127.7

Thoughts on Overall Commercial Character of Chesapeake Beach

- Dominant in marina use, hotel, and restaurant, room to grow # of boats in marina use
- Most basic retail expenditure categories are covered
- Outside of marina, commercial land use is too fragmented and missing agglomeration economies
- Little room to grow retail at current zoned sites, with a couple redevelopment opportunities
- Little professional office space
- Missing a concentration in professional services generally
- Surprisingly little outdoor / recreational retailing and services
- Missing medical and dental, urgent care
- Missing specialty made products that serve tourism and local area such as brew pub, bakery, coffee shop, ice cream, artisan shops

Practical Goals for Economic Development

C.N. Jakubiak, Jan. 22, 2018