Retail Market Analysis & Strategy

Woodlawn, MD

Security Woodlawn Business Association

June 2026

Acknowledgements

The Woodlawn Retail Market Analysis and Recruitment Plan would not have been possible without the thoughtful input of Woodlawn and Baltimore County partners.

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Funding for this initiative provided by Baltimore County.

Consulting services provided by Camoin Associates.

Thank you to the following individuals for their contributions to the Retail Market Analysis.

- William Barge, Chick-Fil-A
- Anthony Carpenter, Security Plus Credit Union
- Tucker Cavanagh, Baltimore County
- Katie Ciarrocchi, Baltimore County
- Ngone Seye Diop, Baltimore County
- Shronda Evans, Baltimore County
- Yolanda Gregory, Baltimore County
- John Griffith, Monoghan's Pub
- Katie Hearn, Redgate
- Gwen Harrison, Woodlawn Village Property Owner
- Richard Kole, Woodlawn Village Property Owner
- Melanie Komolafe, Baltimore County
- Steve Lafferty, Baltimore County
- Alex McCamey, WOLB 1010AM
- Amy Menzer, Baltimore County
- Jack Milani, Monoghan's Pub
- Terry Owens, Owens Media Group LLC
- Sheila Ruth, Maryland House of Delegates, District 44B
- Jonathan Sachs, Baltimore County
- Charles E. Sydnor III, Maryland Senate, District 44
- Anthony Taylor, Baltimore County
- Britney Victorine, Baltimore County

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Executive Summary

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Woodlawn's Retail Market Context

To support the next phase of reinvestment in Woodlawn, Maryland, the Security Woodlawn Business Association (SWBA), in partnership with Baltimore County, engaged Camoin Associates to complete a Retail Market Analysis and Strategy focused on strengthening the area's commercial areas, particularly Woodlawn Village.

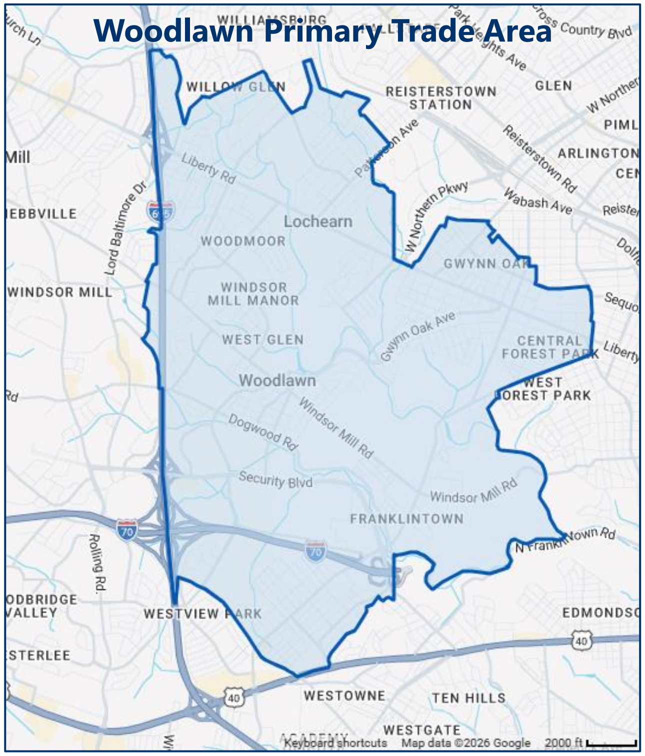
This effort is intended to better understand the current and emerging retail market, and to identify realistic, actionable opportunities to support existing businesses, reduce vacancies, and attract new, market-aligned uses over time. The analysis evaluates demographic and spending patterns, consumer preferences, retail real estate conditions, and competitive dynamics to define what the Woodlawn market can support today, and how that may evolve.

Woodlawn's retail environment reflects both stability and constraint. The market is anchored by a base of long-established neighborhoods and consistent, essentials-driven spending, but is also shaped by population decline, aging commercial space, and shifting consumer expectations. As a result, the opportunity is not centered on large-scale retail expansion, but on better capturing existing demand, improving the functionality and appeal of commercial areas, and strengthening the role of neighborhood-serving retail.

Within this context, Woodlawn Village plays a distinct and important role. As a small-scale, historic commercial node, it is well-positioned to function as a more intentional "main street" environment serving as a place for everyday needs provided by local businesses and an anchor for community gathering. Realizing that potential will require a coordinated approach that aligns business support, targeted recruitment, property-level reinvestment, and placemaking.

This strategy builds on and complements broader planning and investment efforts underway in the area, including Baltimore County's Northwest Gateways Sustainable Community Action Plan and the Reimagine Security Square initiative. While these initiatives establish a long-term vision for large-scale redevelopment and corridor transformation, this report focuses on near- to mid-term, place-based actions that SWBA and its partners can advance to stabilize and strengthen the existing retail environment.

Together, the findings and recommendations presented in this report provide a practical roadmap for reinforcing Woodlawn's commercial districts, supporting local businesses, improving market conditions, and positioning Woodlawn Village as a more active, visible, and connected hub within the community.



Key Market Trends in Woodlawn

The market analysis identified key trends shaping Woodlawn's retail landscape, highlighting the conditions retailers are navigating today, including population decline, aging commercial infrastructure, and shifting consumer expectations. These conditions define both the challenges and opportunities ahead for Woodlawn Village and the surrounding corridor.

1) Retail demand is softening as population and household levels decline. The Woodlawn market area has lost more than 3,000 people since 2010, a trend expected to continue through 2030. Fewer households, coupled with an aging population, dampen long-term demand for discretionary retail and limit growth potential for new store formats.

2) Older household profiles shape an essentials-driven retail market. With 28% of market area aged 60+, spending patterns skew toward groceries, pharmacies, personal services, and home goods. Seniors show a strong preference for in-store shopping, supporting convenience-oriented retail but limiting demand for lifestyle or destination retail.

3) Neighborhood centers remain affordable but struggle with vacancy and aging stock. Woodlawn's small-scale centers (Woodlawn Village, Woodlawn Drive) have lower rents and older buildings. Limited reinvestment and design constraints contribute to persistent vacancy in areas like Woodlawn Drive, where vacancy has exceeded 13% in recent years.

4) Commercial corridors outperform but face structural constraints. Liberty Road and Security Boulevard command higher rents and stronger demand, yet their auto-oriented design, heavy curb cuts, and poor pedestrian environment limit cross-shopping and hinder restaurants and convenience retail that rely on efficient site circulation.

5) Retail supply remains static, placing pressure on aging inventory. Woodlawn's market area added less than 20,000 square feet of new retail space since 2015, despite strong occupancy. Limited new development has helped keep vacancy low around 3%, but it also means most buildings predate modern tenant requirements such as drive-thrus, subdividable mid-boxes, and flexible pad sites.

Key Market Trends in Woodlawn

6) Restaurants show the strongest unmet demand. Retail gap analysis identifies food service as the market's largest opportunity: the market area could support up to 9 new limited-service restaurants and 4 full-service establishments. Parallel leakage in the region reinforces the broader regional undersupply of dining options.

7) Convenience and value-oriented retail present additional growth opportunities. The Woodlawn market area shows leakage in pharmacies, general merchandise (dollar-store formats), small-format grocery stores, gas/convenience stores, and snack/beverage shops, indicating room for 4–6 additional essential-service businesses if site conditions and visibility improve.

These trends reveal a market defined by reliable assets, including stable household spending, low vacancy, and strong corridor traffic. The resulting tension between Woodlawn's foundational strengths and its structural challenges points to a focused set of opportunities in dining, essential services, activation, and placemaking.

The Retail Strategy translates these opportunities into four strategic priorities. Priorities 1-3 are high-priority initiatives to be completed over the next 1-3 years, while Priority 4 is more aspirational and represents an outside-the-box approach to rethinking what is possible in the local economy.

Retail Strategy Priorities

Priority 1:

Strengthen and retain existing Woodlawn businesses

Priority 2:

Unlock sites for dining, grocery, and daily needs

Priority 3:

Position Woodlawn Village as a vibrant community hub for gathering and connection

Priority 4:

Activate underutilized space through maker and micro-production uses

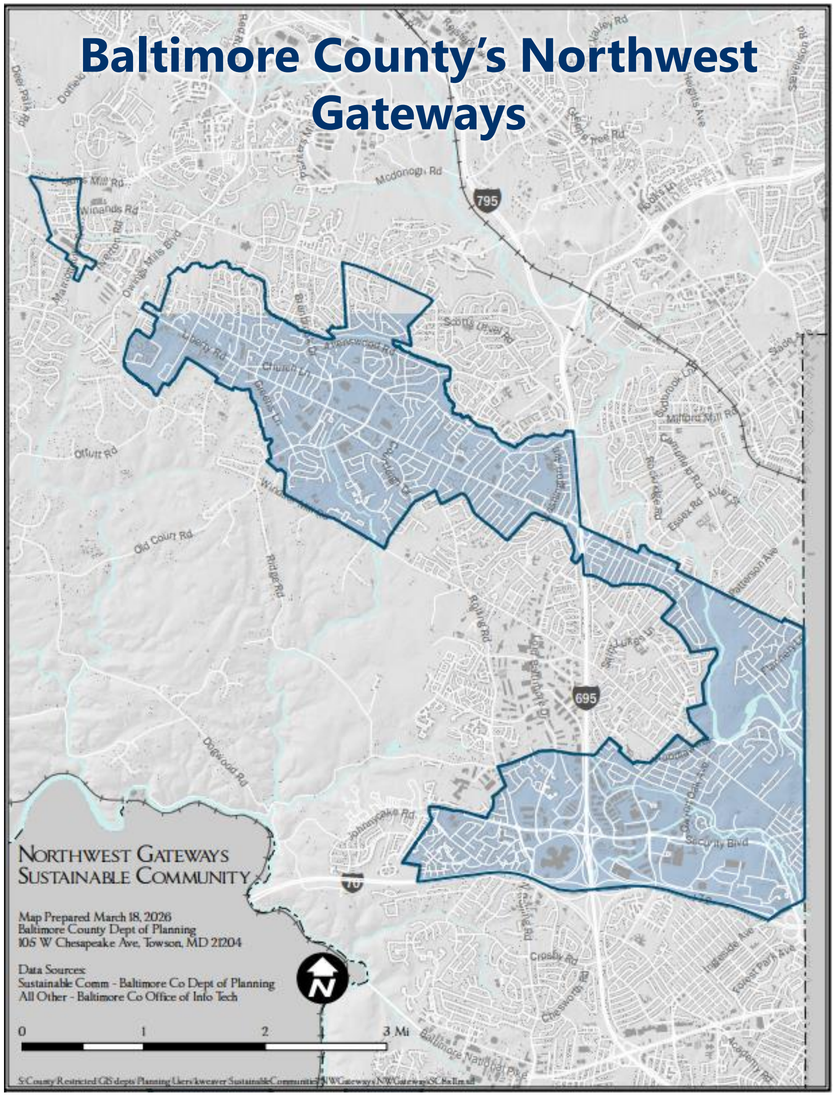
Northwest Gateways Sustainable Community Context

Baltimore County has established a clear and proactive framework for reinvestment in the northwest corridor through its Northwest Gateways Sustainable Community Action Plan, which sets the stage for coordinated revitalization across key commercial districts, including Woodlawn and Randallstown.

Building on this foundation, the consulting team prepared two retail market studies and corresponding strategies—one for the Security Woodlawn Business Association (SWBA) and the Greater Randallstown Community Development Organization (GRCDO)—to translate the County's vision into actionable, place-based strategies. Together, these efforts respond directly to the County's priorities: strengthening local business ecosystems, improving access to capital and technical resources, enhancing the physical environment, and positioning commercial areas to compete more effectively in a changing retail landscape.

Both Woodlawn and Randallstown are navigating similar market pressures, including evolving consumer behavior, increased competition, and the constraints of aging commercial space. At the same time, these conditions present opportunities to reposition each area in the market by strengthening day-to-day retail offerings, elevating the quality and visibility of storefronts, and aligning business recruitment with targeted placemaking investments that shape customer perception and experience.

While connected by shared challenges and opportunities, each corridor operates within a distinct market and organizational context. As a result, each study and strategy tailors its recommendations to reflect the unique assets, constraints, and near-term opportunities present, providing a practical roadmap for implementation that advances both local priorities and the County's broader revitalization goals.



Landscape Assessment

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Landscape Assessment

Government, public-private entities, and community organizations all play important roles in identifying business needs and developing resources to assist new and existing establishments. Woodlawn's Landscape Assessment takes inventory of public and nonprofit programs and other relevant initiatives that can support Woodlawn businesses. The entities included in the Landscape Assessment serve as a starting point for SWBA to think about as possible implementation partners for its Business Retention and Recruitment Plan.

Woodlawn, MD

Security Woodlawn Business Association (SWBA) — SWBA's mission is to support, promote, and revitalize the business community in the Security Woodlawn area of Gwynn Oak, MD and Woodlawn, MD. The organization is dedicated to enhancing the business and neighborhood communities in the area and offers networking, promotion, and resources for economic development.

Baltimore County Public Library: Woodlawn Branch — Serves small-business owners and aspiring entrepreneurs in the Woodlawn community by offering free access to business research databases, workshops, and drop-in sessions with advisors from the county's Economic & Workforce Development team right at the library's COLAB space. This includes one-on-one assistance with business planning, funding, and minority business enterprise certification.

Baltimore County

Baltimore County Department of Economic & Workforce Development — Serves new and existing businesses in Baltimore County by connecting them to site-selection help, finance programs, tax credits, workforce recruitment, and industry data. The department's Business Services and Workforce pages describe coaching for expansion, hiring support, and business-facing programs.

Small Business Resource Center (partnership of Baltimore County & Baltimore County Chamber of Commerce) — A local, county-funded center that serves small-business owners with no-cost technical assistance on business planning, marketing, and finance, plus one-on-one counseling through funded business counselors. The center is run in partnership with the County and the Chamber to deliver workshops and counseling to entrepreneurs across the county.

Baltimore County Chamber of Commerce — Serves businesses of all sizes in Baltimore County with networking, advocacy, membership benefits, and referral services; it also helps businesses navigate county resources and procurement opportunities. The Chamber operates programming and affinity services designed to connect businesses to county government and regional partners.

Maryland Small Business Development Center (SBDC): Baltimore Region / Baltimore Resource Partners — Serves entrepreneurs and established small businesses with free, confidential one-on-one consulting, low-cost training, market research, and help accessing capital. The Baltimore regional SBDC network works with university partners and local resource partners to provide statewide SBDC services in the Baltimore area.

Baltimore County Public Library — Entrepreneur & Small Business Resources — Serves local entrepreneurs and small-business owners with free access to business databases, market research, workshops, online learning (e.g., LinkedIn Learning), and librarian research support. The library runs seasonal programming (e.g., Small Business Month) and points users to county and state business resources.

Landscape Assessment

Community College of Baltimore County (CCBC) — Workforce & Entrepreneurship Programs — Serves prospective and current business owners, employees, and employers with credit and continuing-education courses in entrepreneurship, business management, and customized employer training. CCBC offers workforce certificates, entrepreneurship workshops, and applied programs (including consulting projects and short courses for small-business skills).

Maryland / Baltimore County American Job Centers (Maryland Department of Labor) — Serve employers and jobseekers by providing hiring/recruitment assistance, job posting and referral services, on-the-job training guidance, and workforce development supports. Employers can use these centers to source candidates, access workforce programs, and connect to training incentives.

Baltimore County Supplier Diversity & Purchasing (Office of Budget & Finance / Purchasing Division) — Serves minority-, women-, veteran-, and small-business owners seeking county contracting opportunities by offering MWBE/Supplier Diversity guidance, outreach events, procurement training, and information on County bidding processes. The office runs outreach and procurement workshops to help businesses understand and access public contracts.

SCORE Greater Baltimore (SCORE mentors) — Serves entrepreneurs across Baltimore County with free, volunteer-based mentoring, business-plan reviews, and low- or no-cost workshops on financing, marketing, and operations. SCORE connects small-business owners to experienced mentors and training resources (SBA-affiliated).

Greater Baltimore Committee (GBC) — A regional private-sector civic organization that serves growing businesses and regional economic initiatives by offering advocacy, research, capacity-building partnerships, and private–public coordination (including grant/relief partnerships during emergencies). GBC convenes business leaders and partners on regional policy and recovery efforts that affect Baltimore County companies.

Baltimore Community Foundation (BCF) — Serves community-focused small businesses and nonprofits by distributing local grant funding, coordinating special relief funds (e.g., small-business relief following local disruptions), and making philanthropic investments to strengthen neighborhood economies. BCF runs grant programs and worked with partners to provide direct emergency grants to impacted small businesses.

State of Maryland

Maryland Small Business Development Center (SBDC) — Statewide Network — Serves Maryland-based entrepreneurs and small-business owners by offering free, confidential one-on-one business consulting, low-cost training, access to market research, and assistance identifying funding opportunities. It is part of the national SBDC network and supports business planning, marketing, and financial management statewide.

Office of Small Business Regulatory Assistance (OSBRA) — Serves Maryland small-business owners encountering regulatory or permitting issues by providing guidance, problem-solving assistance, and helping businesses navigate state regulatory requirements. Its goal is to foster a cooperative regulatory environment that supports business success.

Maryland Business Express — Serves entrepreneurs planning or managing a business in Maryland with an online “one-stop” platform for business registration, licensing, permitting, tax setup, and insurance planning. Maryland Business Express streamlines steps to launch, operate, and grow your business in the state.

Landscape Assessment

Neighborhood BusinessWorks — Maryland Department of Housing and Community Development (DHCD) — Serves small businesses and nonprofits in designated Sustainable Communities or Priority Funding Areas by providing flexible loans (up to $5 million) for real estate acquisition, construction, equipment, working capital, and more. Aims to revitalize local commercial areas through inclusive financing.

Neighborhood BusinessWorks Grant & Loan Boost — DHCD (Key-Bridge Recovery Initiative) — Serves small businesses in affected areas by offering microgrants (up to $50,000) and no-interest loans (up to $500,000) as part of emergency recovery funding. Supports business continuity and re-investment in neighborhoods impacted by the Key Bridge collapse.

Port of Baltimore Emergency Business Assistance Program — Maryland Department of Commerce — Serves businesses statewide that rely on Port of Baltimore operations and experienced revenue loss or increased expenses due to port disruptions (e.g., Key Bridge collapse). Offers grants up to $100,000 per eligible business to offset operating losses.

Stakeholder Engagement Summary

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Stakeholder Engagement Summary

Stakeholder engagement activities included a joint SWBA–GRDCO Roundtable in September 2025, a business and community survey administered in Q4 2025, on-the-ground site observations and informal business touchpoints, and various interviews and partner conversations. Findings were presented to SWBA and partner organizations, including Baltimore County, in January 2026. A summary of key insights from the stakeholder engagement process is provided below.

Stakeholder Insights

1. Woodlawn is competitively located and accessible

Roundtable participants emphasized the area's access and connectivity, particularly proximity to I-695 and Baltimore City, as core market strengths that support local and regional investment interest. Stakeholders also noted that lower property taxes than in Baltimore City strengthen Woodlawn's relative competitiveness for businesses and real estate users.

2. Local entrepreneurship is strong, with demand for pathways from home-based to commercial space

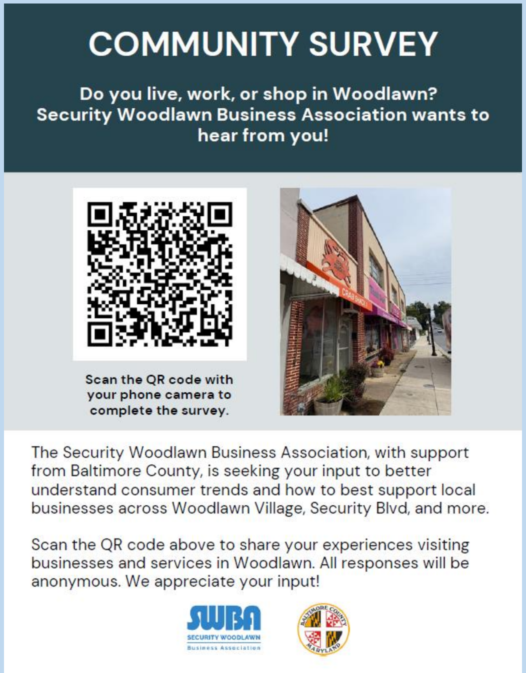
Stakeholders described a strong entrepreneurial drive among local business owners, including individuals operating multiple ventures or side businesses to grow income. Participants highlighted opportunities to pair this energy with incubator-style support and practical assistance that helps entrepreneurs transition into brick-and-mortar locations.

3. Businesses want practical support, especially digital marketing and capital improvements

In the business survey, respondents most frequently identified digital marketing support and funding for capital improvements as the resources that would most help their businesses. Roundtable feedback reinforced that, in addition to façade programs, businesses need financing options and guidance for interior improvements, as well as support navigating leases and other legal considerations.

4. Access to capital is primarily through traditional channels

When asked where they typically seek help accessing capital, business respondents most often pointed to traditional banks and personal savings, with fewer relying on SWBA or government sources. This pattern suggests a need to strengthen awareness of nontraditional and public-sector financing tools, and/or to align local supports with the ways businesses already seek funding.



SWBA distributed its Community Survey digitally and in person to local businesses and community hubs, which generated 68 responses.

Stakeholder Engagement Summary

5. **Businesses depend heavily on residents and workers**

Business survey respondents reported that residents are the primary customer base for Woodlawn businesses, with a large share also serving area workers. A smaller share of respondents indicated that visitors from outside Woodlawn represent a primary customer group, underscoring the current importance of neighborhood-serving retail and services.

6. **Businesses are experiencing shifting consumer behavior and price sensitivity**

Over the past 1–2 years, businesses reported that customers are spending less overall, alongside a noted shift toward higher-quality or premium products. Some businesses also observed increased demand for online ordering and pickup, indicating that operational flexibility and customer experience investments remain important.

7. **Respondents cite limited retail variety and an unappealing environment as key barriers to shopping locally**

In the community survey, respondents most frequently pointed to a limited variety of shops and services as the primary reason they do not visit Woodlawn more often. Respondents also cited an unappealing environment (including cleanliness and landscaping) as a major deterrent, alongside concerns such as parking availability and safety.

8. **Many residents shop outside Woodlawn for greater options and convenience**

Open-ended community survey responses indicate that often go to other commercial areas for shopping and dining, such as Catonsville, Columbia, and Towson. The most common reasons cited relate to having "more options" and "variety," suggesting that recapturing local spending will require both a stronger retail mix and a more compelling customer experience.

9. **Community identity and marketing are viewed as levers for revitalization**

Roundtable participants expressed interest in strengthening community pride and visibility through storytelling, events, and coordinated marketing that spotlights local businesses and youth. Community survey results further suggest that improving awareness of offerings and enhancing the area's overall "look and feel" could complement retail mix strategies and help increase local visitation.

10. **Streetscape, cleanup, and visible reinvestment are recurring priorities**

Stakeholders highlighted corridor cleanup and beautification as important near-term actions to improve perceptions and create a more inviting environment for customers and investors. Site observations reinforced the importance of targeted physical improvements—such as planned streetscape work near key intersections and façade needs on specific buildings—to support a stronger sense of place.

11. **Stakeholders see major redevelopment sites as catalysts, alongside smaller "destination points"**

Engagement emphasized the value of creating clear "destination points" that give residents and visitors reasons to come to Woodlawn and return more often. During the site visit, stakeholders discussed larger opportunity areas (including the Security Mall site) as well as smaller nodes where public-sector investments and property reinvestment could improve visibility, functionality, and long-term redevelopment readiness.

Stakeholder Insights: What this means for Woodlawn

The insights from the stakeholder engagement process suggest that Woodlawn is experiencing a disconnect between existing retail conditions and evolving market demand.

The survey results indicate that Woodlawn continues to play an important role in meeting day-to-day needs, but it is not currently positioned to capture a broader share of local spending. Residents are making deliberate choices to go elsewhere for dining, shopping, and social experiences, not because of distance or access, but because other locations offer a more complete, higher-quality, and more cohesive experience.

This dynamic has several important implications for the corridor:

- **Recapturing spending is achievable.** The consistent use of nearby districts such as Owings Mills, Columbia, and Catonsville demonstrates that demand is already present within Woodlawn's market area. The opportunity is not to create demand, but to better meet it locally.
- **Retail strategy must focus on mix and positioning**. Addressing vacancies alone will not shift market perception. The types of businesses, their quality, and how they cluster together will determine whether Woodlawn can evolve beyond a convenience-based corridor.
- **The physical environment is a core economic driver.** Conditions related to building quality, site maintenance, and overall aesthetics directly influence how people perceive and use the corridor. Improving these elements is essential to supporting both existing businesses and attracting new investment.
- **Woodlawn Village has an opportunity to function differently from the broader corridor.** While much of the corridor will continue to serve convenience needs, there is a clear opportunity to strengthen Woodlawn Village as a more concentrated, walkable hub with a distinct identity and a mix of uses that encourage longer visits and repeat activity.
- **Small shifts in perception can unlock larger behavior changes.** Many respondents indicated they would visit more often if conditions improved through better options, a more inviting and accessible environment, or clearer awareness of what exists. This suggests that targeted, visible improvements can have an outsized impact on visitation and spending.

Ultimately, the path forward is not about competing with every regional retail destination, but about defining a stronger, more intentional role for Woodlawn within the local market, one that builds on its existing customer base while creating new reasons for people to come and stay.

These implications directly inform the strategies, which focus on strengthening Woodlawn's retail mix, improving the quality and experience of the corridor, better supporting local businesses, and positioning key nodes as more vibrant and competitive centers of activity.

Retail Trade Areas

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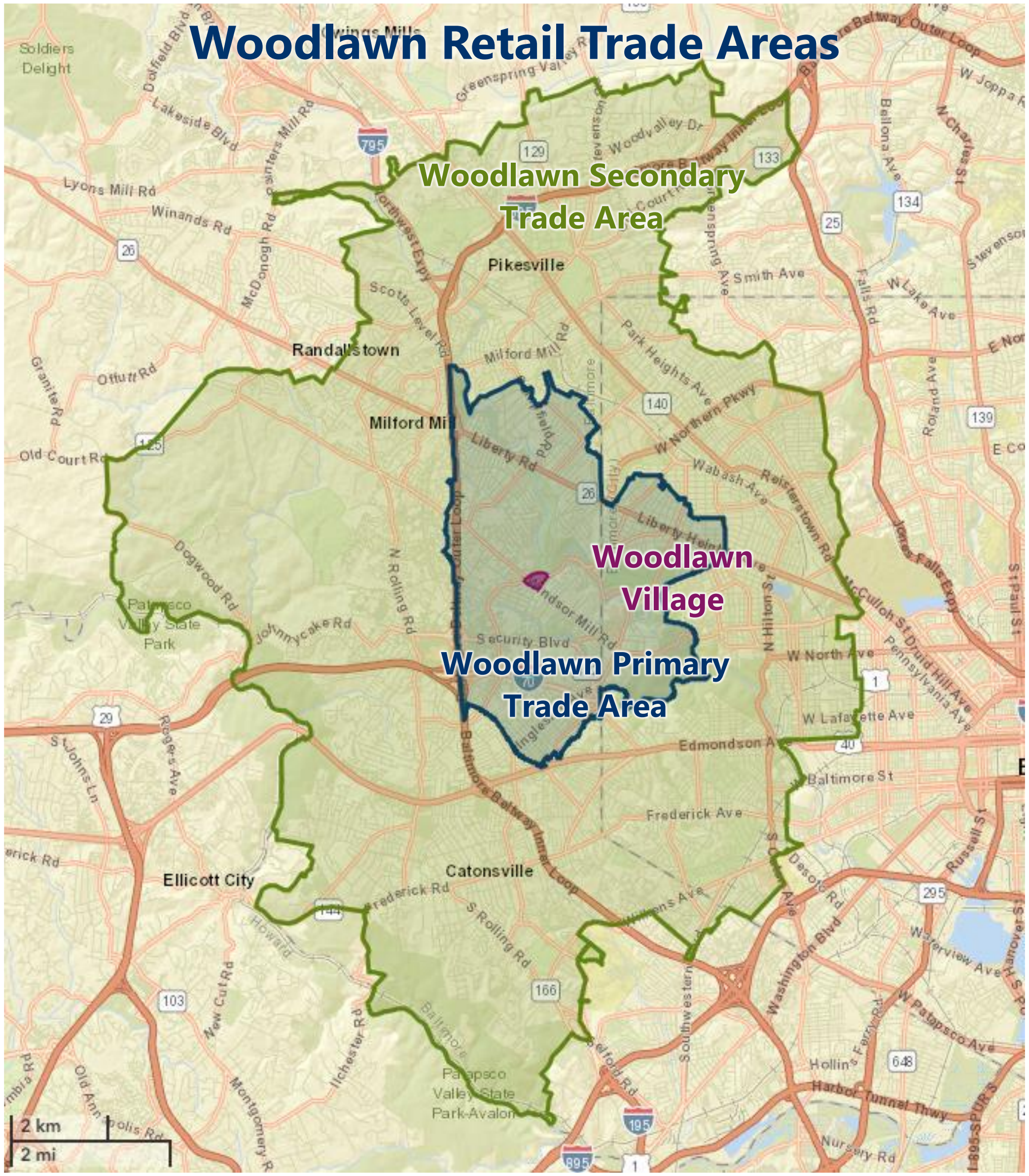
Retail Trade Areas

The **Primary Trade Area (PTA)** is defined as the Gwynn Oak ZIP Code 21207, which fully encompasses the Woodlawn Village and its immediate surroundings. Given the mix of retail offerings within the Woodlawn Village, the PTA represents a catchment area thar provides for daily retail needs such as restaurants and personal services, and goods that focus on the day-to-day needs of the nearby community and form the foundation of neighborhood commerce.

Beyond this local focus, there is an opportunity to extend the village's appeal to a broader customer base through development or expansion of certain types of retail in concert with appropriate promotional activities. This broader geography, identified as the **Secondary Trade Area (STA)** represents an aspirational market with consumers drawn to the character and distinctive, small-scale atmosphere of the village with a unique mix of retailers and restaurants. The STA includes the ZIP Codes shown in the accompanying table.



Note. The data required for this analysis are available only at the ZIP Code level.

Woodlawn Primary and Secondary Trade Areas

ZIP Code	Community
Primary Trade Area	
21207	Gwynn Oak
Secondary Trade Area	
21207	Gwynn Oak
21208	Pikesville
21215	Baltimore
21216	Baltimore
21228	Catonsville
21229	Baltimore
21244	Windsor Mill

Woodlawn Commercial Districts

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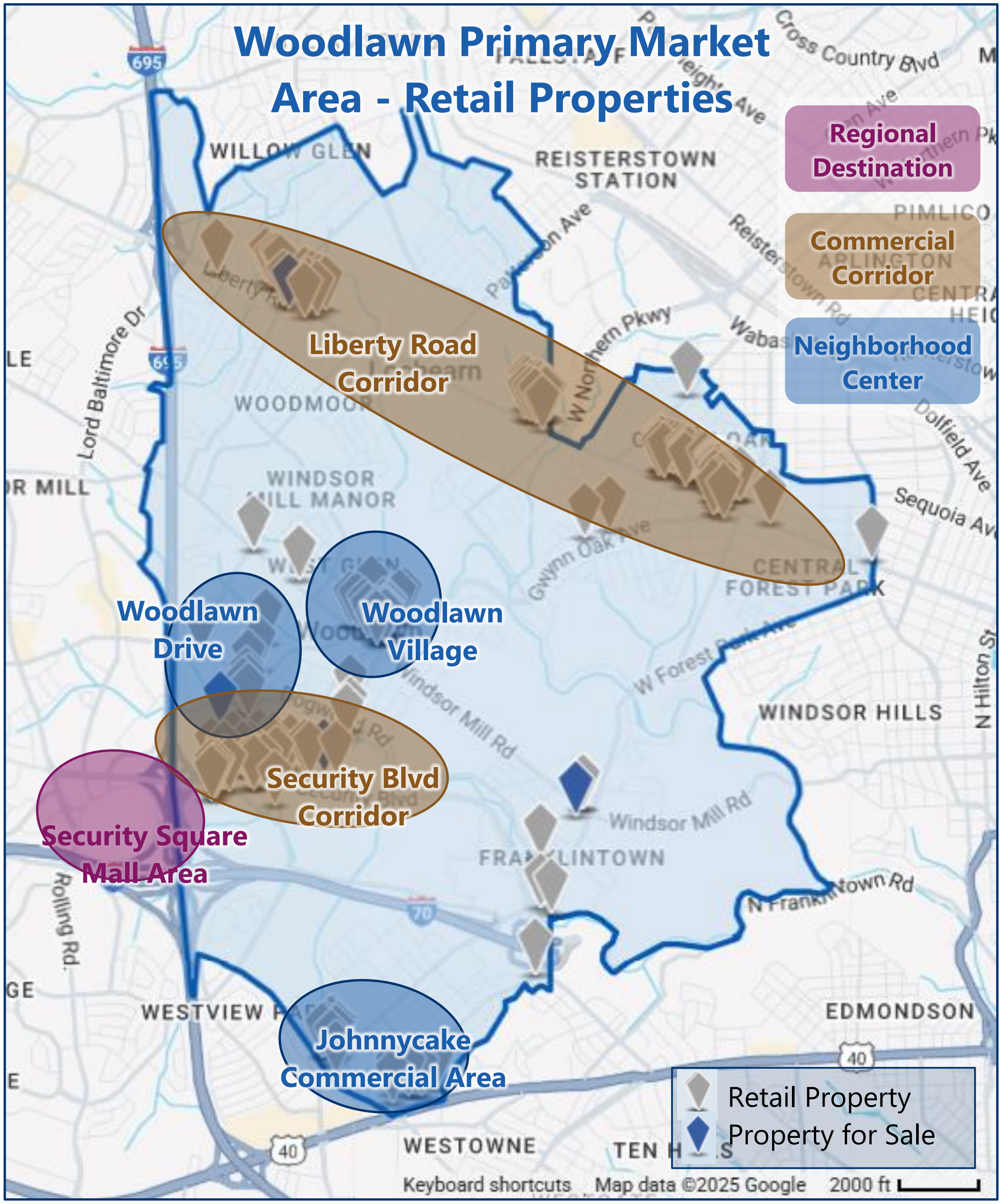
Retail Districts and Corridors: Key Definitions

Retail districts and commercial corridors come in a variety of forms, each serving a distinct role in a community's economic and placemaking ecosystem. Understanding these typologies is essential for evaluating performance, diagnosing challenges, and shaping strategies that align with local demand and development potential. The following definitions outline the primary retail formats.

Regional Destination – Large-scale retail and mixed-use districts that draw visitors from across Baltimore County and beyond. These areas typically feature lifestyle-oriented shopping, dining, and entertainment integrated with residential and office uses.

Commercial Corridor – Linear retail concentrations along major arterials, often auto-oriented with shopping centers, pads, and freestanding stores. These corridors provide both daily needs and destination retail but face challenges with older formats and parcel dimensions.

Neighborhood Center – Smaller-scale retail centers embedded in residential areas, typically grocery-anchored or convenience-oriented. They serve local households with daily needs, services, and limited dining options.



Retail Districts and Corridors of the Woodlawn PTA

The commercial districts within the Woodlawn PTA area illustrate the notable contrast between high-volume, high-rent corridors and smaller, more affordable neighborhood centers, reflecting diverse retail placement within the overall trade area.

- Among the identified commercial areas, the two Commercial Corridors (Liberty Road and Security Boulevard) present a notably larger portion of the overall PTA market, holding 784,000 square feet of commercial space, which is more than double the area of all three Neighborhood Centers combined. Among these, Woodlawn Village is the smallest district at 77,700 sf, confirming its role as a deeply localized convenience hub.
- The Commercial Corridors also command premium prices as compared to the Neighborhood Centers. Security Boulevard's average rent of $42.00/sf is more than twice the rate of the Woodlawn Drive area rate. Note that this makes the Neighborhood Centers like Woodlawn Drive ($15.00/sf) and Woodlawn Village ($16.00/sf) significantly more affordable, suitable for small, local service businesses.
- The Woodlawn Drive area also stands out for its difficulty in maintaining tenants. Over the past five years, this district saw negative net absorption, pushing vacancies up above 13%. It is likely this market weakness that, in part, holds rental rates at such a reduced level.
- Notably, there has been minimal new development activity over the past five years in any of the identified commercial districts.

Woodlawn PTA Commercial Districts

Market Area	Number of Buildings	Area (sf)	Average Rent*	Available Space (sf)	Vacancy Rate	Five-Year Net Absorption (sf)	Five-Year Leasing Activity (sf)
Liberty Road Corridor	68	407,709	$35.52	3,892	1.8%	6,158	12,700
Security Blvd Corridor	24	376,315	$42.00	39,963	0.5%	834	64,862
Woodlawn Drive Area	9	142,118	$15.00	19,387	13.6%	-12,087	15,260
Woodlawn Village	24	77,692	$16.00	NA	NA	0	3,000
Johnnycake Commercial Area	17	148,810	$30.00	NA	NA	0	2,835

***Note:** Average rental rate per square foot per year

Source: CoStar, Camoin Associates

Developable Sites

- Based on data provided by the real estate information service CoStar, seventeen developable sites are identified covering a total of roughly 43 acres.
- These sites are dispersed throughout the PTA with a concentration found along the study area's eastern and western borders.
- Larger parcels include three 5-6 acre properties along Security Blvd and a 7-acre site on West Northern Parkway at Liberty Road.

Woodlawn PTA - Developable Sites

Property Address	City	Land Area (AC)
4017 Chatham Rd	Baltimore	0.21
6700 Dogwood Rd	Baltimore	3.18
2700-2814 Hillsdale Rd	Baltimore	2.00
2701 Hillsdale Rd	Baltimore	1.04
1700 Ingleside Ave	Baltimore	0.75
4016 Liberty Heights Ave	Baltimore	0.14
5001 Liberty Heights Ave	Baltimore	0.11
5100 Liberty Heights Ave	Gwynn Oak	0.59
5000 W Northern Pky	Baltimore	7.70
5801 Security Blvd	Baltimore	6.38
6611-6633 Security Blvd	Baltimore	5.66
4927-33 W Forest Park	Baltimore	1.36
1658 Whitehead Ct	Baltimore	1.17
4825 Windsor Mill Rd	Gwynn Oak	5.25
6819 Windsor Mill Rd	Gwynn Oak	3.95
4017 B Rogers Ave	Gwynn Oak	0.13
6301-6327 Seton Ridge Dr	Baltimore	3.37

Source: CoStar

Woodlawn Village Profile

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Woodlawn Village Profile

Woodlawn Village is a small historic business district centered around Gwynn Oak Avenue and Windsor Mill Road. The village functions as a neighborhood-serving commercial node surrounded by stable, middle-income residential areas. Retail is a mix of small independent operators that provide everyday needs such as food, personal services, and convenience goods. The market draws from diverse, long-established neighborhoods with relatively high household density and above-average spending on beauty and personal care. Traffic volumes and nearby employment anchors, particularly Social Security Administration and regional office uses, create steady pass-by demand, providing opportunities to convert that demand into higher-value activity.

Building conditions and property investment remain a key challenge in the district. A significant share of the existing building stock shows signs of prolonged underinvestment, with elevated vacancy and aging façades contributing to a perception of disinvestment in parts of the corridor. In many cases, properties are owned by non-local landlords, which can complicate reinvestment and coordinated improvement efforts. At the same time, SWBA has taken proactive steps to address these conditions through a façade improvement program and targeted aesthetic upgrades, resulting in visible improvements to several storefronts and helping to strengthen the overall appearance of the business community.

Woodlawn Village Retailers and Other Businesses

Source: CoStar

Commercial and Community Legacy

Woodlawn's commercial center also holds an important place in the area's social and cultural history. Established in the early–mid 20th century as the surrounding neighborhoods grew, the district functioned as a key community-serving hub at a time when access to goods, services, and recreation was shaped by segregation and exclusion elsewhere in the region. Its proximity to Gwynn Oak Amusement Park, an epicenter of local civil rights activism during the 1960s, underscores Woodlawn's role within a broader history of Black community life, resilience, and advocacy in western Baltimore County. For decades, the village center supported everyday needs and served as a gathering place for residents who built strong social and economic ties despite systemic barriers. Reinvestment in the district's building stock and vitality represents an opportunity not only to address current market challenges, but to honor and sustain Woodlawn's long-standing role as a vital neighborhood center for the community it has historically served.

Today's Business Mix

Of those commercial properties identified in the area, the greatest representation comes from personal and laundry service (primarily beauty salons) with five establishments occupying 18,000 sf of retail space.

Much of the building stock is older, with a median age of 72 years, one property dates back to 1904.

Types of Businesses - Woodlawn Village Area

Type of Business and NAICS Code	Number of Businesses	Total Area (sf)
Specialty Trade Contractors (238)	1	NA
Motor Vehicle and Parts Dealers (441)	1	5,613
Clothing and Clothing Accessories Stores (448)	1	6,395
Miscellaneous Store Retailers (453)	3	11,871
Sporting Goods, Hobby, Musical Instrument,and Other Misc Retailers (459)	2	5,609
Professional, Scientific, and Technical Services (541)	2	4,008
Amusement, Gambling, and Recreation Industries (713)	2	10,667
Food Services and Drinking Places (722)	5	7,940
Repair and Maintenance (811)	1	4,541
Personal and Laundry Services (812)	5	18,089
Religious, Grantmaking, Civic, and Similar Organizations (813)	1	2,960
Total	**24**	**77,692**

Source: CoStar, Camoin Associates

Woodlawn Village Business Inventory

The Woodlawn Village commercial area hosts a strong base of personal service and local retail businesses, supplemented by a significant footprint of activity and event spaces, and a variety of quick-serve and full-service food options. Identified properties and businesses are listed below.

Woodlawn Village Properties

Property Address	Business Title	NAICS* Industry Classification and Code	Bldg Class	Area (sf)
2105 Gwynn Oak Ave	Legacy Awards	Gift, Novelty, and Souvenir Stores (453220)	C	2,532
2107-2109 Gwynn Oak Ave	Le Décor Boutique	Le Décor Boutique (448120)	C	6,395
2108 Gwynn Oak Ave	Carson & Gray Masonry	Masonry Contractors (238140)	NA	N/A
2110 Gwynn Oak Ave	J&B Auto Sales	Used Car Dealers (441120)	C	5,613
2113 Gwynn Oak Ave	KR Hair Studio	Beauty Salon (812112)	C	1,148
2115 Gwynn Oak Ave	Income Tax/Real Estate Service	Tax Preparation Services (541213)	B	2,256
2121 Gwynn Oak Ave	Monaghan's Pub	Drinking Places (Alcoholic Beverages) (722410)	NA	2,183
2125 Gwynn Oak Ave	Apostolic Church Ministry	Religious Organizations (813110)	C	2,960
2135-2137 Gwynn Oak Ave	Peace and Blessings Florist	Florists (453110)	C	4,672
6320 Windsor Mill Rd	Smoking Tree	Tobacco and Other Smoking Supplies (459991)	C	4,667
6322 Windsor Mill Rd	Fantasy Fitness & Body Sculpting	Fitness and Recreational Sports Center (713940)	NA	4,667
6324 1/2 Windsor Mill Rd	Crab Shack II Restaurant	Full-Service Restaurants (722511)	C	1,016
6324 Windsor Mill Rd	Charlotte B Closet Thrift Store	Used Merchandise Stores (453310)	NA	4,667
6325 Windsor Mill Rd	Da Shop	Barber Shops (812111)	C	3,062
6328 Windsor Mill Rd	Joy Joy Land Event Space	Other Amusement/Recreation (713990)	B	6,000
6403 Windsor Mill Rd	Island Quizine	Limited-Service Restaurants) (722513)	NA	1,346
6405 Windsor Mill Rd	Arundel Cleaners/Tailor	Drycleaning and Laundry Services (812320)	NA	9,395
6411 Windsor Mill Rd	N/A - 7 Salon Tenants	Beauty Salon (812112)	NA	3,194
6413 Windsor Mill Rd	B.More Tobacco Outlet	Tobacco and Other Smoking Supplies (459991)	NA	942
6415 Windsor Mill Rd	Unlimited Designs Hair Salon	Beauty Salon (812112)	NA	1,290
6417 Windsor Mill Rd	MJ's Tags and Title Service	Title Abstract and Settlement Offices (541191)	C	1,752
6423 Windsor Mill Rd	Woodlawn Auto Repair	General Automotive Repair (811111)	B	4,541

***Note:** North American Industry Classification System (NAICS)

Source: CoStar, Camoin Associates

Market Area Demographics

7

Population

From 2010 to 2020, the Woodlawn PTA witnessed significant declines in population, losing nearly 3,100 residents (-3.4%). This drove a similar reduction in households, which fell by 0.6% over the same time frame. This pattern of contraction then strengthened over the subsequent five years, as the PTA saw even more rapid declines in both population and households from 2020 to 2025. These recent trends have, in turn, dampened demand at local retailers.

Looking forward, prospects remain muted, with continued reductions in households anticipated for both the Woodlawn PTA and for the STA. This reflects the broader Baltimore County/City pattern with expectations of further declines in population and only the slightest prospects for gains in the number of households for the overall region through 2030.

This overall demographic environment portends little in the way of demand growth for area retailers.

Population Trends by Geography, 2010-2030

	PTA	STA	Baltimore County/City	Maryland
Population				
2010	47,681	303,636	1,425,990	5,773,552
2020	46,056	295,742	1,440,243	6,177,224
2025	44,600	287,850	1,417,975	6,270,068
2030 (Proj.)	44,045	284,456	1,412,443	6,367,035
Population Change (Pct. Change)				
2010-2020	-3.4%	-2.6%	1.0%	7.0%
2020-2025	-3.2%	-2.7%	-1.5%	1.5%
2025-2030	-1.2%	-1.2%	-0.4%	1.5%
Annualized Population Change				
2010-2020	-0.3%	-0.3%	0.1%	0.7%
2020-2025	-0.6%	-0.5%	-0.3%	0.3%
2025-2030	-0.3%	-0.2%	-0.1%	0.3%

Source: Decennial Census; Esri

Household Trends by Geography, 2010-2030

	PTA	STA	Baltimore County/City	Maryland
Households				
2010	18,525	119,806	566,618	2,156,411
2020	18,416	118,349	581,443	2,321,208
2025	18,237	117,803	585,185	2,380,700
2030 (Proj.)	18,162	117,513	589,540	2,431,169
Household Change (Pct. Change)				
2010-2020	-0.6%	-1.2%	2.6%	7.6%
2020-2025	-1.0%	-0.5%	0.6%	2.6%
2025-2030	-0.4%	-0.2%	0.7%	2.1%
Annualized Household Change				
2010-2020	-0.1%	-0.1%	0.3%	0.7%
2020-2025	-0.2%	-0.1%	0.1%	0.5%
2025-2030	-0.1%	0.0%	0.1%	0.4%

Source: Decennial Census; Esri

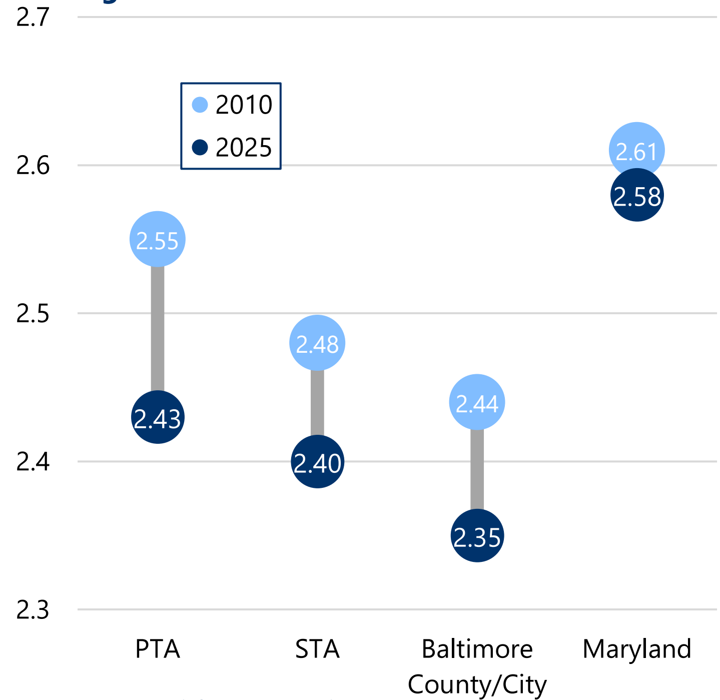
Households

Average household size has shown steady declines nationally and this overall pattern of change has been reflected in the study area. The Woodlawn PTA, specifically, posted a notable shift from 2010 to 2025, as this measure fell by over 0.1 persons per household over the past fifteen years.

Declines in population seen throughout the region are, in part, offset, as falling household size buffers the steepness of losses in households throughout the PTA and STA. For Baltimore County/City, this effect was sufficient to allow an increase in households, despite a net loss in population.

In large part, declining household size comes as a result of the overall aging of the population. Communities are increasingly made up of empty-nesters and of seniors — many of whom live alone. This changing household profile, in turn, has implications for retailers who must focus their offerings to reflect shifting demographic trends.

Average Household Size



Source: Decennial Census; Esri

Population and Households

	Population			Households			Average Household Size		
Geography	**2010**	**2020**	**2025**	**2010**	**2020**	**2025**	**2010**	**2020**	**2025**
PTA	47,681	46,056	44,600	18,525	18,416	18,237	2.55	2.48	2.43
STA	303,636	295,742	287,850	119,806	118,349	117,803	2.48	2.45	2.40
Baltimore County/City	1,425,990	1,440,243	1,417,975	566,618	581,443	585,185	2.44	2.41	2.35
Maryland	5,773,552	6,177,224	6,270,068	2,156,411	2,321,208	2,380,700	2.61	2.61	2.58

Source: Decennial Census, Esri

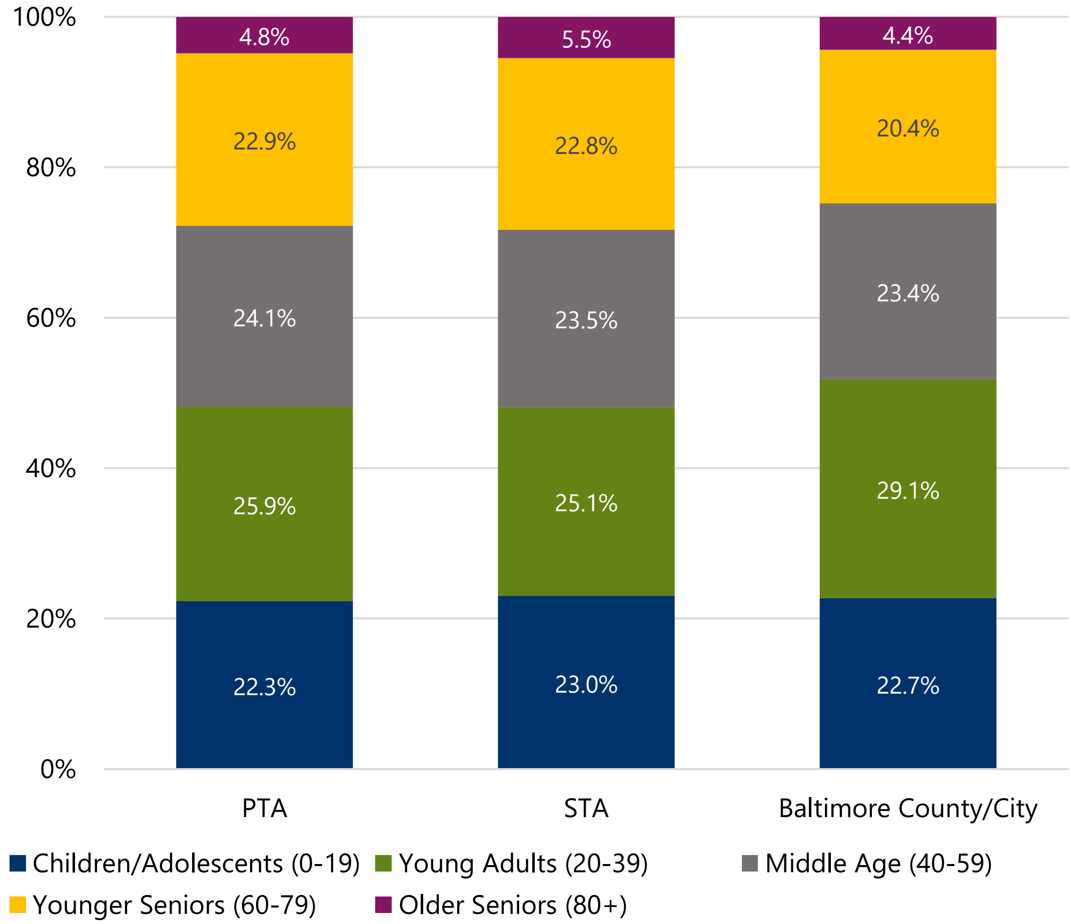
Population by Age

The Woodlawn PTA and, more generally, the STA are home to an older population than the larger region. The median age is nearly one and a half years higher in the PTA than in the broader Baltimore County/City area.

The PTA shows over one-quarter (28%) of all residents aged 60 years and over. Conversely, the Baltimore County/City more closely mirrors the overall state, with 25% of residents falling into these categories.

These older households tend to favor health and wellness products to a greater extent than do the younger cohorts. They also show a greater degree of spending on home goods and prefer in-store shopping rather than through e-commerce channels.

Population by Age Cohort, 2025



Source: Esri

Median Age by Geography and Year

Geography	2010	2025	Increase
PTA	38.5	41.5	3.0
STA	39.5	41.5	2.0
Baltimore County/City	37.0	38.7	1.7
Maryland	37.8	39.8	2.0

Source: Decennial Census, Esri

Household Income Distribution

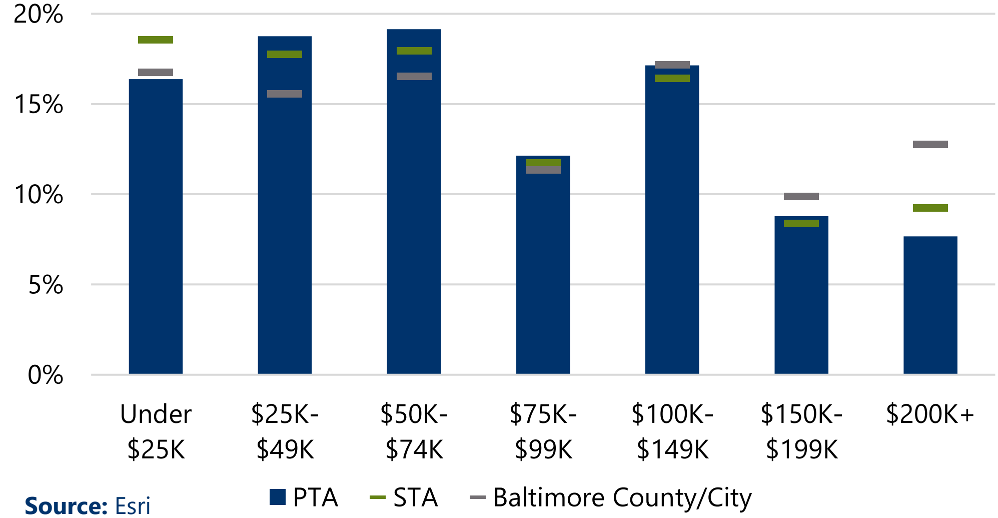
The PTA and STA have income levels notably lower than in the broader Baltimore County/City region, diminishing their ability to support as robust an overall retail environment.

Differences among these geographies are evident in the distribution of households by income bracket. The PTA shows a distribution more tightly clustered around the middle incomes, with a notably strong share of households in the $25,000 to $49,000 and the $50,000 to $74,000 ranges (about 19% for each), compared to more modest shares seen in the broader area (about 18% for each income bracket in the PTA and 16% for the County/City).

In a related fashion, households in the PTA show notably lesser shares in the lowest (under $25,000) and highest ($200,000 and above) ranges.

This middle-weighted income profile indicates that retailers serving the PTA will be most competitive when they focus on goods and services aligned with the spending patterns of middle-income households, particularly convenience-oriented retail, essential services, and value-driven dining options.

Household Income Distribution, 2025



Source: Esri

Households by Income Group, 2025

Income Bracket	PTA	STA	Baltimore County/City	Maryland
Under $25K	16.4%	18.6%	16.8%	11.2%
$25K-$49K	18.8%	17.8%	15.6%	11.9%
$50K-$74K	19.1%	17.9%	16.5%	13.4%
$75K-$99K	12.1%	11.7%	11.3%	11.7%
$100K-$149K	17.1%	16.4%	17.2%	19.1%
$150K-$199K	8.8%	8.4%	9.9%	12.1%
$200K+	7.7%	9.2%	12.8%	20.7%
Income	$67,339	$67,728	$76,998	$103,503

Source: Esri

Households by Race and Ethnicity

The Woodlawn PTA is home to a predominantly Black/African American community, with this group making up about 80% of local residents. Smaller shares of the population identify as White or Hispanic, each representing roughly 7% of the PTA.

Looking beyond the immediate area, the community becomes more diverse. In the Secondary Trade Area (STA), Black/African American residents continue to make up the largest share of the population (64%), alongside a growing White population that accounts for just over one-fifth (22%) of the population. Across Baltimore County and Baltimore City as a whole, the population is more evenly balanced, with Black/African American and White residents each representing about 40% of the total population.

At the state level, Maryland reflects even broader diversity. Hispanic residents account for 13% of the population statewide, and Asian residents make up 7%. These groups are present in Woodlawn as well, though in smaller proportions, reflecting the distinct demographic makeup of the immediate community compared to the broader region.

Population Composition by Race/Ethnicity, 2025

Race/Ethnicity	PTA	STA	Baltimore County/City	Maryland
White	7%	22%	40%	45%
Black/African American	80%	64%	41%	29%
American Indian/Alaska Native	0%	0%	0%	0%
Asian	2%	5%	6%	7%
Pacific Islander	0%	0%	0%	0%
Other	1%	1%	1%	1%
Two or More Races	3%	3%	4%	5%
Hispanic	7%	6%	8%	13%
Total	**100%**	**100%**	**100%**	**100%**

Source: Esri

Households by Age and Income

The 35–64 age cohorts of the Woodlawn PTA present a strong mid-career presence with solid incomes. These households form the largest share and are concentrated in middle to upper-middle income ranges. These households anchor predictable retail demand, especially for groceries, dining, home improvement, and personal services.

The area also includes a large and aging senior population with more modest incomes. Nearly 6,000 households are age 65 or older, with a large proportion earning under $50,000 annually. This group sustains year-round demand for essentials but contributes less to discretionary or specialty retail spending.

Younger adults represent a smaller but rising segment of the Woodlawn PTA population. These households, aged under 35 years, enjoy early-career income growth. Their spending is now more value-driven, but it will expand as they earn more.

Retail demand in this market is shaped by stability rather than volatility. The mix of mid-career earners and seniors supports steady, necessity-oriented retail activity. Those retail categories tied to daily needs, such as health and home services, are best positioned.

Opportunities lie in balanced, convenience-oriented retail offerings of grocery, pharmacy, general merchandise, and health services. These will likely see the strongest baseline demand. Selective specialty retail and dining can succeed by appealing to the spending capacity of mid-career households while maintaining accessible price points for the area's large senior population.

2025 Households by Income and Age of Householder, PTA

	<25	25-34	35-44	45-54	55-64	65-74	75+	Total
<$50,000	220	650	765	659	1,068	1,526	1,518	**6,406**
$50,000-$74,999	91	494	581	585	712	625	403	**3,491**
$75,000-$99,999	47	336	378	384	465	371	232	**2,213**
$100,000-$149,999	40	451	571	697	742	388	237	**3,126**
$150,000-$199,999	13	202	331	311	352	297	96	**1,602**
$200,000+	5	136	369	283	313	170	123	**1,399**
Total Change	**416**	**2,269**	**2,995**	**2,919**	**3,652**	**3,377**	**2,609**	**18,237**
Median HH Income	**$46,687**	**$74,301**	**$83,427**	**$87,325**	**$76,904**	**$54,733**	**$42,423**	**$67,339**

Source: Esri BAO

Households by Age and Income

The PTA is expected to decline by approximately 75 households over the coming five years. Losses will be most heavily concentrated among the 25-34 and 55-64 age groups, leading to a potential softening of demand for goods associated with young families and active pre-retiree spending (e.g., starter furniture, fast fashion, high-tech gadgets).

Conversely, a significant growth in the 75+ cohort (+470 households) points to increased demand for services and products that support aging in place, including medical supplies, accessible pharmacies, and healthcare providers. These older households will likely also be increasingly inclined towards a greater reliance on grocery and food delivery, and attracted to businesses with easy accessibility, parking, and in-store navigation. Demand will also grow for home maintenance, security systems, and services targeting fixed-income or limited-mobility customers. This shift towards an older population suggests retailers in the Woodlawn PTA will need to adapt their offerings, marketing, and services to cater to the needs and spending habits of senior and mature consumers.

Some retailers may also find success targeting mid-career , as a rise in the 35-44 and 45-54 cohorts suggests continued stability and potential growth in demand for established family goods, home improvement, and personal services (e.g., salons, dry cleaners, or home furnishings for established residences).

In targeting these growth segments, retailers will need to prioritize highlighting value, convenience, service, and quality (appealing to older, financially mature consumers).

Growth in Households by Age of Householder in the PTA - 2025 to 2030

	<25	25-34	35-44	45-54	55-64	65-74	75+	Total
2025	416	2,269	2,995	2,919	3,652	3,377	2,609	18,237
2030	396	2,068	3,042	3,002	3,237	3,338	3,079	18,162
Five Year Change	-20	-201	47	83	-415	-39	470	-75

Source: Esri

Consumer Segments & Indices

8

Consumer Segments & Indices

Understanding consumer segments and indices helps clarify how households in the market area spend, shop, and engage with retail. For this analysis, we reviewed several sources of consumer data, including spending indices, market potential indicators, and lifestyle segmentation. These sources are widely used in retail market studies because they offer insights into purchasing patterns, product preferences, and common types of retail experiences. These indices simply aggregate behavioral data that retailers, developers, and planners nationwide use to understand demand. By examining these patterns, we can better identify which types of stores, services, and dining options are most likely to succeed, and which are less aligned with local spending habits.

Tapestry Segmentation

ESRI's Tapestry Segmentation is a widely used market research tool that groups households into categories based on a combination of demographic, socioeconomic, housing, and lifestyle characteristics. Rather than focusing on any single factor—such as income, age, or household size — Tapestry segments reflect patterns in how households live, work, and spend.

In retail and market analysis, Tapestry data is used to help describe the types of consumers present in a given area and to understand how consumer profiles may differ across geographies. For the two market areas, this tool has identified the segments most prominent within the primary and secondary market areas. Definitions are provided on the following page.

Primary Tapestry Household Profiles - Most Common for PTA and STA

	Typical Household	Share of Households		Median Age	Median Income	Completed College Degree	Median Home Value	Homeownership Rate	Rent Burdened Households	Labor Force Participation Rate
		PTA	STA							
Stable Suburban Families	Married couples, singles living alone or with relatives	30.3%	20.7%	41.0	$58,100	23.2%	$183,000	65.6%	42.0%	58.9%
Young Urban Achievers	Married couples, singles living alone or with relatives	15.4%	7.1%	38.5	$76,900	29.3%	$575,000	43.7%	44.9%	63.6%
Affluent Suburban Professionals	Married couples	13.8%	9.7%	41.5	$94,800	33.9%	$451,000	75.8%	39.6%	64.9%
Classic Comfort	Married couples	6.9%	2.3%	40.2	$88,900	32.6%	$263,000	80.5%	29.6%	68.6%
Cityscapes	Singles living alone, roommates	5.5%	4.8%	39.3	$26,600	16.1%	$152,000	23.6%	44.1%	46.7%
Kids and Kin	Singles living alone, married couples	5.2%	7.0%	33.3	$51,000	20.6%	$201,000	39.2%	45.2%	65.8%
Modest Income Homes	Singles living alone, married couples	0.0%	9.1%	37.1	$35,100	12.4%	$81,000	46.9%	46.1%	50.6%

Note: Figures represent national averages

Source: Esri, Camoin Associates

Consumer Tapestry Segment Definitions

- **Stable Suburban Families:** These established households are concentrated in suburban areas, featuring a mix of single-person, multigenerational, and married-couple families, often with adult children at home. They earn moderate incomes, work in government, health care, or retail, and favor practical spending, traditional media, and strong community ties.
- **Young Urban Achievers:** Young, diverse, and densely urban, these communities are characterized by upwardly mobile households with middle-tier incomes and high labor force participation. They live in rental or moderately priced homes, use digital payments and ride-sharing apps, and maintain active, connected lifestyles.
- **Affluent Suburban Professionals:** Mature suburban families, mainly married or partnered couples, live in established neighborhoods with stable employment and moderate incomes. They are practical, value-oriented consumers who prioritize home and financial stability, favor trusted brands, and enjoy a comfortably rooted suburban lifestyle.
- **Classic Comfort:** Established, middle-aged suburban households exhibiting long residential tenure and stable dual incomes. Their consumer behavior tends toward predictable, brand-loyal purchasing patterns, with a strong emphasis on home maintenance and practical goods. They value routine, reliability, and traditional retail formats rather than emerging or trend-centric concepts.
- **Cityscapes:** Diverse, mobile renters living in more dense neighborhoods with smaller housing footprints. Their daily needs are met through convenience-oriented retail, transit-accessible services, and limited-service dining options. Spending patterns reflect price sensitivity, flexibility, and a preference for walkable or close-in commercial environments.
- **Kids and Kin:** Family-oriented suburban households managing the financial demands of raising school-age children on moderate incomes. Retail spending is centered on groceries, children's goods, quick-service dining, and recreation, all of which align with family schedules. They respond strongly to convenience and value.
- **Modest Income Homes:** This group includes economically constrained households — often older adults or single-person — in older, lower-cost housing. Their purchasing power is limited, resulting in highly budget-conscious and essentials-focused retail behavior. Discount, dollar-store, and value-driven formats are their primary shopping destinations, with minimal discretionary spending.
- **Other:** The primary consumer profiles above capture the majority of households found in the PTA, with the balance made up of several differing but similar household types. Generally, profiles of these additional households are characterized as capturing a mix of working- and middle-income , varied family structures, and housing types, unified by practical spending habits, strong local ties, and everyday routines shaped by the blend of suburban stability and urban dynamism.

Trade Area Consumer Profiles

Households in the PTA tend to exhibit broader discretionary spending patterns and a stronger orientation toward quality, convenience, and experience. ESRI profiles indicate interest in:

- Dining out, including fast-casual, sit-down, and global or specialty cuisines
- Personal and professional services, such as fitness, wellness, personal care, and financial services
- Home-related spending, including furnishings, décor, improvement, and maintenance
- Apparel, household goods, and specialty retail that balances quality and value
- Leisure activities tied to family outings, socializing, and personal enrichment

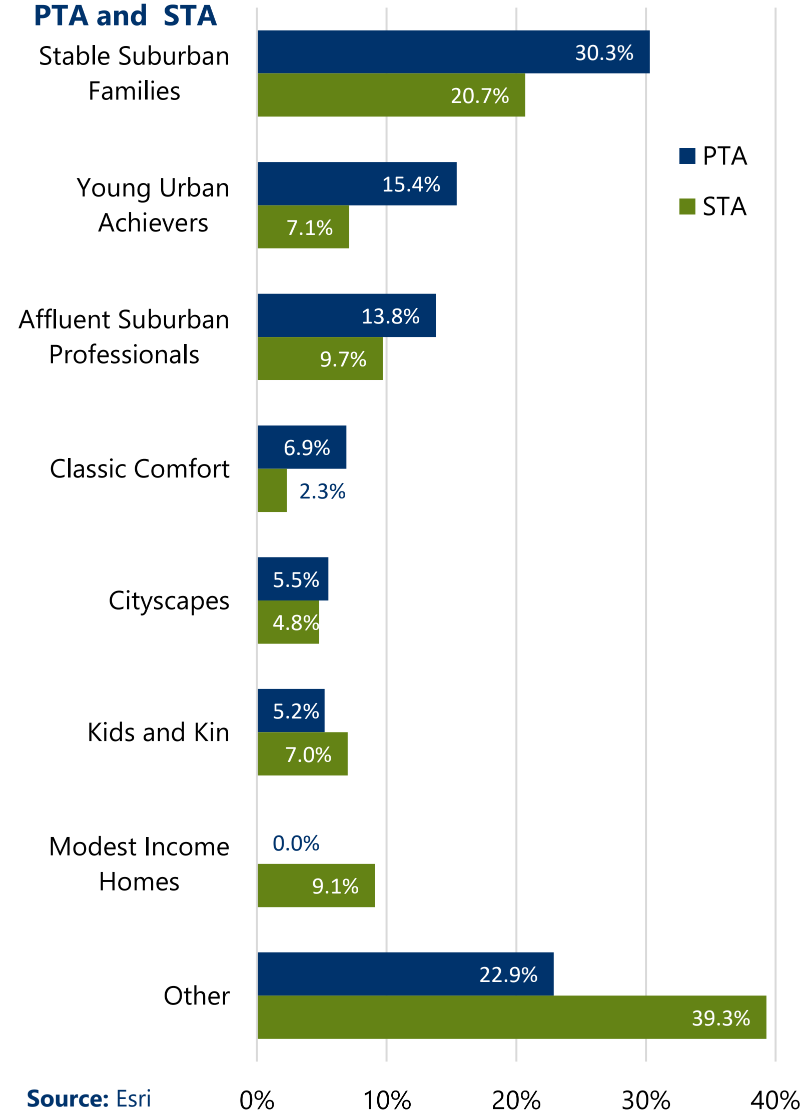
Many PTA households are active in the workforce, maintain busy schedules, and value time-saving services, reliable brands, and environments that feel curated or well-maintained. Even among family-oriented segments, spending extends beyond basic needs to include occasional discretionary purchases tied to lifestyle, comfort, and convenience.

STA includes a more diverse mix of household types, that share a greater emphasis on necessity-based and value-conscious spending. Common spending patterns and interests across STA segments include:

- Everyday retail focused on essentials, staples, and frequently purchased goods
- Price-sensitive dining options, including quick-service and takeout
- Family-oriented and practical services, such as childcare-related needs, basic health services, and auto-related services
- Entertainment and leisure activities that are low-cost, local, or home-centered
- Limited discretionary spending

Both trade areas include households with families, working adults, and renters and homeowners. However, the key distinction lies in the balance between discretionary and necessity-driven spending. PTA consumers, on average, demonstrate greater flexibility in how and where they spend, with interests extending into lifestyle-oriented goods and services. STA consumers, by contrast, reflect more constrained spending patterns, with a stronger emphasis on value, practicality, and routine purchases.

Tapestry Segments - Greatest Proportions for PTA and STA



Source: Esri

"Tapestry" – Esri's Tapestry Segmentation classifies neighborhood into a wide array of market segments based on demographic, socioeconomic, and behavioral characteristics. The system is intended to facilitate highly targeted analysis and decision-making for planning and community development.

Market Potential Index

The Market Potential Index (MPI) represents how households within the PTA typically spend their money as compared to national patterns.

Notably, among the highest values of this index are oriented around types of home-based entertainment and dining delivered through gaming (130), delivered fast food (117), and take-out food (110).

Households in the PTA area are also more likely to own a single car (114), buy on credit, and have taken a modestly priced foreign trip (109).

The Index also points out how households in the PTA are quite unlikely to make more expensive spending decisions, such as purchasing an Apple computer, or holding stocks and mutual funds. They are also less likely to own a dog or a cat.

Market Potential Index

The **Market Potential Index (MPI)** Measures the likelihood that of an area will participate in a given activity or consumer behavior compared to **the U.S. average (index = 100), based on survey-derived consumer habits.**

This index measures *propensity* — how likely people say they are to do something (e.g., go to a movie, buy organic food, use rideshare apps).

The index increases for those items where spending by households within that community register especially high compared to the US patterns. Conversely, if few households spend in a way similar to the overall national average, a lower index value is derived.

Twelve Select Spending Categories with Highest MPI - PTA

Product/Consumer Behavior	MPI
HHld Purchased Video Game System/12 Mo	130
Ordered Home Delivery Fast Food/6 Mo	117
HHld Has Single Vehicle Covered w/Auto Insurance	114
Will Pay More for Env Safe Prods	114
HHld Subscribes to Cable TV	113
Bought Watch/12 Mo	112
Buy Based on Quality Not Price	112
Bought Fine Jewelry/12 Mo	111
Ordered Take-Out/Walk-In Fast Food/6 Mo	110
Drank Non-Diet (Regular) Cola/6 Mo	109
Buy on Credit Rather Than Wait	109
Spent $1K-2999 on Foreign Vacations/12 Mo	109

Source: Esri

Twelve Select Spending Categories with Lowest MPI - PTA

Product/Consumer Behavior	MPI
Ordered Eat-In Fast Food/6 Mo	87
HHld Owns Apple/Mac Brand Computer	85
Member of Frequent Flyer Program	85
Went to Live Theater/12 Mo	84
Have 401(k) Retirement Savings Plan	84
Own E-Reader	84
Took 3+ Domestic Non-Business Trips/12 Mo	82
HHld Bought or Leased New Vehicle/12 Mo	80
HHld Owns Dog/Cat	80
HHld Spent $1K or more on Most Recent Home Computer	77
HHld Has 3+ Vehicles Covered w/Auto Insurance	75
Own Any Stock/Mutual Funds	70

Source: Esri

Spending Potential Index

Households in the PTA show clear essentials-driven, at-home–oriented spending patterns. Higher SPI levels for food items, prescription drugs, apparel, smoking products, and basic electronics indicate households that prioritize routine necessities and items that support daily living. Stronger spending on cable, televisions, and software also points to a community that relies heavily on in-home entertainment.

Lower SPI values for childcare, air travel, recreational vehicles, cultural activities, and sports or exercise equipment reflect below-average levels of discretionary spending and limited emphasis on travel, recreation, or lifestyle-oriented purchases. Similarly, reduced spending on home remodeling suggests fewer resources available for major improvements.

Overall, these patterns are consistent with modest- to middle-income households that direct a larger share of their budgets toward core needs and affordable at-home activities, while spending less on experiences, travel, and large home or leisure investments.

<u>Spending Potential Index</u>

The **Spending Potential Index (SPI)** measures the relative amount of money households in an area are likely to spend on specific goods or services compared to the national average (index = 100) and **is <u>based on consumer spending data.</u>**

Values reflect actual expenditure levels — how much households spend (e.g., total dollars on groceries, furniture, recreation, etc.) as compared to national averages.

With income levels below the US average, SPI measures in the PTA are reduced overall**. Local values for the index center around 77**, representing a general level of spending per household about 23% below the national average.

Twelve Select Spending Categories with Highest SPI - PTA

Product/Consumer Behavior	SPI
Snacks and Other Food at Home	112
Dating Services	97
Smoking Products	85
Rental and Repair of TV/Radio/Sound Equip	84
Prescription Drugs	84
Cable and Satellite Television Services	82
Women's Apparel and Services	81
Installation of Televisions	81
Telephones and Accessories	81
Computer Software	80
Televisions	80
Bakery and Cereal Products	80

Source: Esri

Twelve Select Spending Categories with Lowest SPI - PTA

Product/Consumer Behavior	SPI
Computer Accessories	74
Recreational Vehicles and Fees	74
Reading Materials	74
Child Care	74
Airline Fares	74
Mortgage Payment and Basics	72
Fees for Recreational Lessons	71
Tickets to Parks or Museums	69
Sports/Recreation/Exercise Equipment	69
Maintenance and Remodeling Materials/Svcs	70
Miscellaneous Video Equipment	66
Catered Affairs	64

Source: Esri

Retail Real Estate Market Setting

9

Retail Real Estate: National Market Trends

A snapshot of national-level market trends provides a point of comparison for Woodlawn. While the COVID-19 pandemic's immediate effects have normalized, structural shifts driven by continued e-commerce growth, evolving consumer preferences, and economic pressures continue to shape retail real estate dynamics.

Market Dynamics

- **Vacancy and Rent Trends:** Retail vacancy rates remain historically low, averaging 4.7%–5.8% nationally, despite recent store closures and bankruptcies. Limited new construction and constrained supply have kept availability tight, pushing rents higher in prime locations. Asking rents grew modestly in 2024 and early 2025, with open-air and grocery-anchored centers outperforming enclosed malls. Urban retail remains challenged, while suburban and Sun Belt markets show strong absorption.
- **E-commerce Impact:** Online sales continue to gain share, accounting for 16% of retail sales growth in 2024 and projected to exceed 30% of total retail sales by 2030. Retailers are shrinking footprints by ~2% annually and prioritizing omnichannel strategies, such as click-and-collect and curbside pickup. Vacant big-box spaces are increasingly repurposed for fulfillment centers or experiential concepts.
- **Consumer Preferences:** Experience-driven retail remains critical. Shoppers favor interactive environments, dining, and wellness offerings over traditional transactional spaces. Experiential retail and "retailtainment" concepts—integrating entertainment, fitness, and technology—are driving foot traffic and brand loyalty.

Emerging Trends

- **Mixed-Use Development:** Demand for live-work-play environments continues to rise. Underperforming malls are being redeveloped into mixed-use projects combining residential, retail, and entertainment. These projects cater to hybrid work lifestyles and community engagement.
- **Shift in Tenant Mix:** Non-traditional tenants account for an increasing share of retail leasing, including medical ("medtail"), wellness, education, and personal services. Quick-service restaurants and health/wellness brands dominate new leases, often in smaller-format spaces with drive-thru and curbside capabilities.
- **Grocery-Anchored Strength:** Grocery and discount retailers remain resilient, driving leasing velocity in open-air centers. Chains like Aldi and Dollar General continue aggressive expansion, reinforcing demand for necessity-based retail.
- **Investment Climate:** Retail property investment has rebounded, with cap rates stabilizing after prior volatility. Grocery-anchored centers and single-tenant net-leased assets remain investor favorites, commanding strong pricing.

Outlook

The outlook for retail real estate remains **cautiously optimistic:**

- Tight supply and low vacancy will support rent growth, especially in suburban and mixed-use formats.
- E-commerce will continue pressuring traditional formats, but omnichannel strategies and experiential retail will sustain physical store relevance.
- Non-traditional tenants and wellness concepts will expand, while discretionary categories (apparel, electronics) face headwinds.
- Markets with strong population growth and infrastructure investment—particularly in the Sun Belt and Midwest—will outperform.

Outlook for the Security Square Mall

A 2023 study by Baltimore County presents a community-driven roadmap for revitalizing Security Square Mall, featuring sustainable design, improved mobility, and enhanced public amenities. The aim is to transform the aging, underutilized 88-acre site into a vibrant, walkable, mixed-use community. The plan is to emphasize extensive community engagement through surveys, workshops, and meetings with over 1,000 and stakeholders. Key findings and recommendations include:

- **Existing Conditions:** The mall, built in 1972, has suffered from decades of underinvestment, resulting in significant vacancies and deteriorating infrastructure. The site is car-dominated, with poor pedestrian and bicycle access, limited green space, and a lack of inviting public amenities. Ownership is fragmented among six entities, complicating redevelopment efforts.
- **Community & Market Analysis**: The surrounding Woodlawn area is diverse, with strong middle-class demographics and significant regional employment centers. Market analysis projects robust demand for mixed-use development over the next decade, including residential, office, retail, and hotel uses.
- **Vision Plan:** The long-term framework centers on three elements.
  - A greenway network for recreation and environmental benefits.
  - Mixed-use development with residential, retail, office, and civic spaces.
  - Entertainment and activity nodes to anchor community life.

  The plan envisions more than 2,000 residential units, 98,000 sf of civic space, 210,000 sf of office, and 390,000 sf of active ground floor uses at full build-out. Flexibility is emphasized to adapt to changing market and community needs.
- **Implementation:** Redevelopment is divided into the phases below.
  - Phase One: Focuses on infrastructure, pedestrian networks, open spaces, and initial site activation.
  - Phase Two: Introduces new mixed-use development, structured parking, and a central plaza.
  - Long-Term Scenarios: Options include retaining or demolishing the existing mall, with expanded residential, office, retail, and civic uses.

Source: Baltimore County Reimagine Security Square Final Report 2023

Retail Market Area: Real Estate Trends

The real estate market for retail along the PTA has held steady over the past decade, with slightly stronger overall demand and a diminished amount of unoccupied space. The upshot has been a notable decline in vacancies, now standing at 2.6% — down 2% over the past decade.

Overall inventory has held at a steady 1.1 msf since 2015 with essentially no growth in the stock of retail space. Similarly, total square footage in the STA has also held essentially unchanged.

Market conditions for the STA, on the other hand, have been more challenging, brought on by an overall decline in demand. Since 2015 the amount of vacant space available in the STA has increased nearly threefold. This, in turn, brought a notable rise in vacancy rates, which climbed steadily from a healthy 4% to an uncomfortably high 11% in 2025.

The limited amount of vacant space within the PTA has allowed property owners to negotiate higher rental rates, which have jumped 40% over the past decade — a much stronger rise than has been seen within the STA or broader Baltimore County/City.

Regional Retail Real Estate Dynamics

Inventory Bldgs	PTA	STA	Baltimore City and County
2015	147	1,088	8,560
2025	146	1,098	8,575
10 Year Growth	**-0.7%**	**0.9%**	**0.2%**
Inventory Area (sf)			
2015	1,108,126	12,433,957	74,636,848
2025	1,102,527	12,429,999	74,975,080
10 Year Growth	**-0.5%**	**0.0%**	**0.5%**
Vacant Area (sf)			
2015	49,759	530,428	3,810,049
2025	29,022	1,309,133	4,632,738
10 Year Growth	**-41.7%**	**146.8%**	**21.6%**
Vacancy Rate			
2015	4.5%	4.3%	5.1%
2025	2.6%	10.5%	6.2%
10 Year Change	**-1.9%**	**6.2%**	**1.1%**
Occupied Area (sf)			
2015	1,058,367	11,903,529	70,826,799
2025	1,073,505	11,120,866	70,342,342
Net Absorption	**15,138**	**-782,663**	**-484,457**
10 Year Growth	**1.4%**	**-6.6%**	**-0.7%**
Rental Rates ($/sf/yr)			
2015	$14.46	$16.56	$15.51
2025	$20.33	$20.02	$18.99
10 Year Change	**$5.87**	**$3.46**	**$3.48**
10 Year Growth	**40.6%**	**20.9%**	**22.4%**

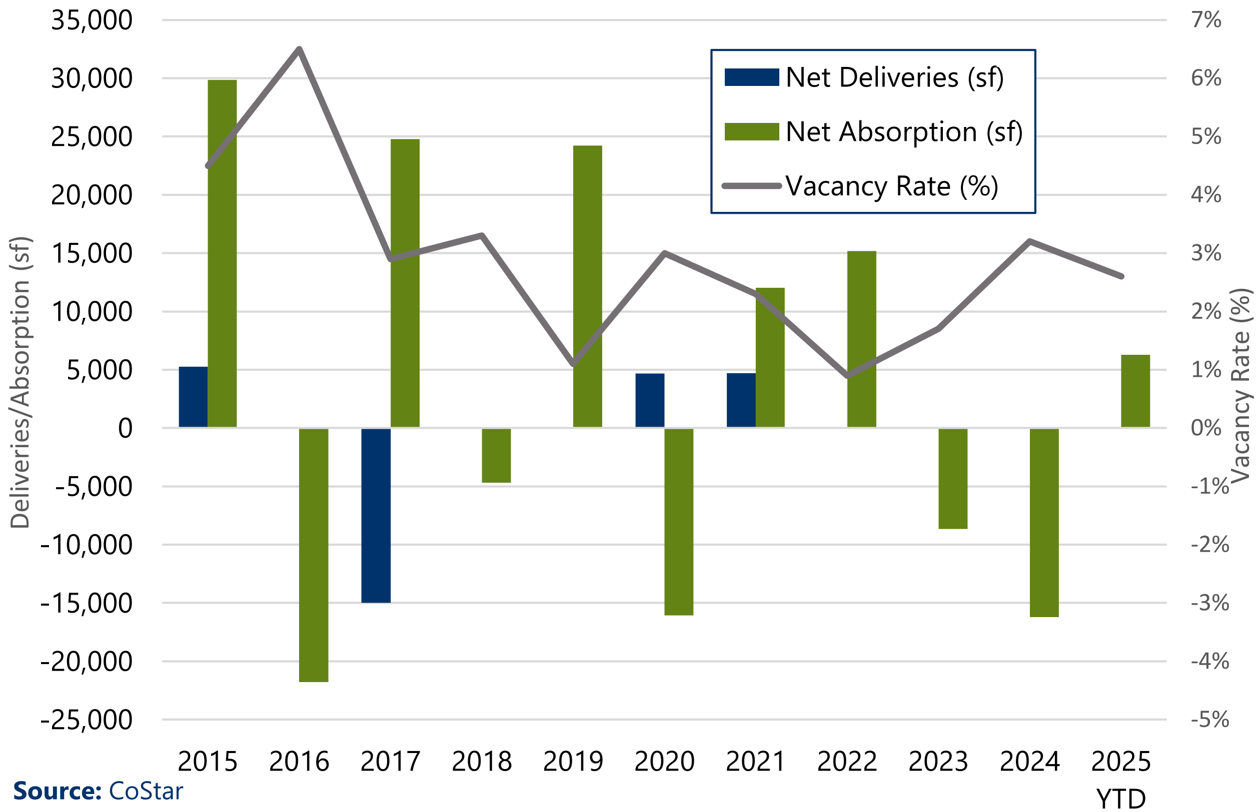
Source: CoStar

Retail Market Dynamics in the PTA

The retail market experienced fluctuating demand growth since 2015, with brief times of modest positive absorption followed by years declining occupancies. On balance, however, the market area has managed to provide sufficient demand to hold vacancy rates at or below the 3% for most of the past decade.

Restrained levels of new construction throughout this period also proved helpful. With only a modest amount of additional space delivered, the area has avoided the challenges of excess space that can come with limited demand growth.

Primary Trade Area Retail Market Performance - 2015 to 2025



Source: CoStar

Characteristics of Retail Real Estate

Four-fifths (83%) of the 146 retail properties found within the Woodlawn PTA measure less than 10,000 sf. By cumulative area, however, these smaller properties account for just over one-third (39%) of total retail floor space in the market.

A handful of much larger properties measuring over 50,000 sf each account for more than one-fifth (21%) of total retail space. Among these larger properties are the Security/Meadows Plaza and the ShopRite of Howard Park.

Despite the relatively healthy market environment for retail real estate, only a modest degree of new construction activity has occurred over the past five years including development of a Royal Farms in North Forest Park Avenue, and an AutoZone on Liberty Heights Ave.

Notably, the 150,000 sf of new construction activity over the 2000 to 2019 timeframe was the lowest level seen since the mid-1900s and with that, the median age of retail properties in the Woodlawn PTA stands at 65 years (median construction date is 1960).

This limited new development is helpful to existing properties as the introduction of any new space would likely boost vacancies even higher.

Retail Properties by Size Class - 2025

	Structures		Total Square Footage	
Area Bracket (sf)	**Number**	**Share**	**Area**	**Share**
Less than 5,000	94	64.4%	239,409	21.7%
5,000 to 9,999	27	18.5%	185,502	16.8%
10,000 to 14,999	11	7.5%	130,212	11.8%
15,000 to 24,999	5	3.4%	97,458	8.8%
25,000 to 49,999	6	4.1%	217,627	19.7%
50,000 or greater	3	2.1%	232,320	21.1%
Total	**146**	**100.0%**	**1,102,528**	**100.0%**

Source: CoStar

Retail Properties by Year of Construction/Renovation - 2025

	Structures		Total Square Footage	
Year	**Number**	**Share**	**Area**	**Share**
1929 or earlier	16	11.0%	68,559	6.2%
1930 to 1944	33	22.6%	122,616	11.1%
1945 to 1959	20	13.7%	129,499	11.7%
1960 to 1979	33	22.6%	307,897	27.9%
1980 to 1999	24	16.4%	267,605	24.3%
2000 to 2019	11	7.5%	151,200	13.7%
2020 or later	2	1.4%	14,684	1.3%
Not Known	7	4.8%	40,468	3.7%
Total	**146**	**100.0%**	**1,102,528**	**100.0%**

Source: CoStar

Recent Development Activity

The Woodlawn PTA includes 1.1 msf of total retail stock which has seen only the most modest degree of new construction activity over the past decade — less than 20,000 sf in total since 2015.

As recently as 2022, vacancies for the PTA's retail market dipped below 1% - an exceptionally tight measure. Two subsequent years of negative absorption, however, drove an overall reduction in demand for space by 19,000 sf over the past three years. This in turn pushed vacancy rates up to a still somewhat tight 3% by 2025.

Despite the prevailing market health, rental rates have shown a degree of volatility over the past decade, with prices dropping below $17/sf per year in 2024. Preliminary figures for 2025, however, point to a significant rebound to over $20/sf — a 23% jump from the year prior.

Retail market Metrics - Woodlawn PMA

	Area (sf)			Vacancy	
Year	Inventory	Vacant	Absorption	Rate	Rental Rate
2015	1,108,126	49,759	29,863	4.5%	$14.46
2016	1,108,126	71,537	-21,778	6.5%	$13.60
2017	1,093,126	31,744	24,793	2.9%	$15.76
2018	1,093,126	36,424	-4,680	3.3%	$14.77
2019	1,093,126	12,184	24,240	1.1%	$13.26
2020	1,097,810	32,935	-16,067	3.0%	$16.30
2021	1,102,527	25,613	12,039	2.3%	$19.26
2022	1,102,527	10,435	15,178	0.9%	$23.89
2023	1,102,527	19,101	-8,666	1.7%	$21.32
2024	1,102,527	35,310	-16,209	3.2%	$16.59
2025	1,102,527	29,022	6,288	2.6%	$20.33

Source: CoStar

Most Recent Retail Construction Activity - Woodlawn PTA

Property Address	Property Name	Area (sf)	Year Built
4601 Liberty Heights Ave	ShopRite	68,000	2014
1658 Whitehead Ct	Dunkin', Grocery, & Hair Salon	5,250	2015
2000 N Forest Park Ave	Royal Farms	4,684	2020
4904 Liberty Heights Ave	AutoZone	10,000	2021

Source: CoStar

Retail Gap Analysis

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Retail Gap Analysis

A retail gap analysis is a tool used to understand whether a community's retail base is meeting the spending needs of its population. At its core, it compares what local households spend on goods and services to what local businesses actually sell. When local shoppers spend more than local stores provide, the difference represents a positive retail gap — often called "sales leakage." In these cases, unmet demand is effectively flowing to businesses outside the area. When the opposite occurs — in other words, when local sales exceed the spending power of local households — the area shows a negative retail gap, or "sales surplus," signaling that non-residents are coming into the community to shop.

The analysis evaluates leakage or surplus across dozens of retail and service categories, benchmarking each against average annual sales per establishment for the region. This allows analysts to identify which industries show meaningful leakage and could potentially support additional local businesses. As a conservative rule of thumb, only about 25% of leaked sales is realistically recapturable. If that 25% exceeds the average sales volume of a typical business in that category, it suggests the market may be strong enough to support a new storefront.

To develop these insights, retail demand and supply were compiled for 89 industries (based on 6-digit NAICS codes) within the Primary Trade Area. Using 2024 data, the difference between local spending and local sales was calculated, adjusted by the 25% recapture assumption, and compared to the Baltimore County/City average sales per establishment.

Both leakage and surplus can emerge for a variety of reasons. Leakage may reflect missing store types, inconvenient locations, or competition from larger regional centers. Surpluses can arise when an area attracts tourists or out-of-area shoppers, when specialty clusters draw regional demand, or when the market is simply saturated with a particular type of business. Overall, a retail gap analysis provides a structured way to understand these dynamics and pinpoint potential new retail opportunities.

Example of the Retail Leakage Calculations

Consumer spending at full-service restaurants within the PTA totaled $63.5M in 2024. Sales by local establishments, however, came to only $23.4M, resulting in a retail leakage of $40.1M.

If new businesses within the PTA were to capture 25% of those lost dollars, it would provide $10.0M in increased local sales.

Average sales per establishment for restaurants is $2.2M annually, meaning that the capture of twenty-five percent of lost sales could support 4+ additional restaurants in the PTA.

Example - Retail Leakage of Full Service Restaurants

Spending by Local Population	$63,463,000
Local Sales	$23,397,000
Retail Leakage	$40,066,000
25% Recapture	$10,016,000
Average Sales per Business	$2,177,000
Supportable Businesses	**4.6**

Source: Lightcast, Camoin Associates

Retail Gap Analysis – Sales Leakage (PTA)

The customer base for most PTA retailers include primarily local households who look to the area for day-to-day consumer items found at grocery stores, pharmacies, and quick-service restaurants.

Depending on the strength of offerings and overall environment, the PTA can capture unmet demand, or leakage, from across the market area. With targeted business attraction, placemaking, and improved visibility, the PTA can strengthen its role for everyday purchases, dining, and discretionary shopping, drawing both local residents and visitors who now spend elsewhere.

The retail gap analysis measures consumer spending to show how much occurs locally within the PTA, and how much goes to vendors outside the area or online. Findings highlight segments where demand exceeds supply, signaling opportunity for new investment, and where offerings already surpass demand, pointing to saturation.

Serving the most local of needs, the Retail Gap Analysis identifies several sectors within the PTA with notably strong growth potential, particularly in food service. Both full-service and limited-service restaurants show significant unmet demand within the PTA, with the area's capacity to support as many as 9 and 4 new establishments, respectively, across the broader market area. Snack and beverage bars also demonstrate expansion potential; another example of unmet demand in the food-service category. Beyond dining, opportunities exist for an additional pharmacy and general merchandise retailer (e.g., dollar-store format type of retailer).

Supportable Retail Businesses, Primary Trade Area

NAICS	Description	2024 Total Demand	2024 Total Sales	Retail Leakage (Surplus)	25% Recapture	Average Sales per Business*	Supportable Businesses
722513	Limited-Service Restaurants	$70,570,335	$10,384,720	$60,185,616	$15,046,404	$1,666,443	9.0
722511	Full-Service Restaurants	$63,462,513	$23,396,926	$40,065,587	$10,016,397	$2,176,536	4.6
722515	Snack and Nonalcoholic Beverage Bars	$5,408,719	$22,193	$5,386,526	$1,346,631	$618,518	2.2
457110	Gasoline Stations with Convenience Stores	$20,718,244	$7,922,402	$12,795,843	$3,198,961	$1,624,029	2.0
456110	Pharmacies and Drug Retailers	$19,881,213	$2,113,085	$17,768,128	$4,442,032	$2,367,115	1.9
455219	All Other General Merchandise Retailers	$9,382,631	$2,862,407	$6,520,223	$1,630,056	$1,155,234	1.4
445110	Supermarkets and Other Grocery (except Convenience) Stores	$36,427,465	$22,016,858	$14,410,607	$3,602,652	$3,830,832	0.9
713940	Fitness and Recreational Sports Centers	$6,439,015	$994,662	$5,444,353	$1,361,088	$1,502,866	0.9

*Average sales for businesses in Baltimore City and County

Source: Lightcast

Retail Gap Analysis – Sales Leakage (STA)

A Retail Gap Analysis was also performed for the broader STA, showing some similar results as found in the PTA-based figures. Note that, due to the significantly larger geography, the factor used in calculating the potential capture of leaked spending is reduced to just 5%.

As seen in the PTA, dining remains the strongest opportunity, with both limited-service and full-service restaurants showing large, regionwide leakage. Even with a conservative 5% capture rate, the market could support 8+ new quick-service and 6 new full-service establishments — a powerful indicator of unmet regional demand.

Convenience-oriented categories also show room for growth, including gasoline stations with convenience stores and snack/beverage shops. These findings reflect the broader region's tendency to leave the area for quick, routine purchases.

Alcoholic drinking places emerge as an additional niche, showing enough unmet demand to support at least one more establishment. This aligns with the broader pattern of strong food-and-beverage spending leaking to other corridors.

General merchandise remains under-supplied, with leakage suggesting capacity for another value-oriented or small-format discount.

Taken together, the STA results reinforce the PTA findings, indicating that Woodlawn's opportunity is not just local but sub-regional, especially in food service, strengthening the case for targeted restaurant recruitment and placemaking-focused reinvestment.

Supportable Retail Businesses, Secondary Trade Area

NAICS	Description	2024 Total Demand	2024 Total Sales	Retail Leakage (Surplus)	5% Recapture	Average Sales per Business*	Supportable Businesses
722513	Limited-Service Restaurants	$504,260,433	$230,019,239	$274,241,194	$13,712,060	$1,666,443	8.2
722511	Full-Service Restaurants	$475,561,129	$218,766,035	$256,795,094	$12,839,755	$2,176,536	5.9
457110	Gasoline Stations with Convenience Stores	$148,838,941	$65,890,994	$82,947,947	$4,147,397	$1,624,029	2.6
722515	Snack and Nonalcoholic Beverage Bars	$47,362,310	$19,568,698	$27,793,611	$1,389,681	$618,518	2.2
455219	All Other General Merchandise Retailers	$65,789,137	$32,405,662	$33,383,475	$1,669,174	$1,155,234	1.4
722410	Drinking Places (Alcoholic Beverages)	$24,734,383	$10,596,375	$14,138,008	$706,900	$618,612	1.1

*Average sales for businesses in Baltimore City and County

Source: Lightcast

Retail Gap Analysis

The fact that the PTA and STA analyses independently identify the same areas of unmet demand — particularly in dining and convenience-oriented retail — indicates that these gaps are not isolated to a single neighborhood but are embedded in the broader regional market. When both trade areas show parallel leakage patterns, it suggests that households throughout the trade areas behave similarly: they routinely leave the PTA and STA to meet everyday needs that, in a more balanced retail environment, would be satisfied locally. This alignment across geographies confirms the primary findings, identifying deficiencies in local retail supply rather than anomalies in data boundaries or household spending estimates.

From a market-structure perspective, the consistency of dining-related leakage is especially notable. Restaurant spending typically diffuses across many nodes, and strong leakage in both trade areas suggests that Woodlawn's current offerings are less competitive or visible than they might be. are choosing alternative destinations with stronger clusters or more contemporary formats, a pattern that often reflects the condition, design, or offerings of local providers rather than a lack of underlying demand. The opportunity, therefore, goes beyond simply adding more restaurants and suggests creating an environment where dining fits coherently into daily travel patterns and feels like a natural stop for both local and pass-through households.

With unmet demand emerging at the regional scale, the Woodlawn PTA has the potential to capture more of its own residents and increase its share of discretionary and convenience-driven trips from nearby communities. Addressing these gaps will take more than bringing in new tenants. It requires improving the layout of Woodlawn's retail areas, how stores relate to one another, and how easy it is for people to move between them. Strengthening clusters and fixing site issues that discourage people from staying longer or visiting multiple businesses are practical steps that matter as much as the tenant mix itself.

In this context, placemaking is not about image or branding; it is about creating a functional retail environment that supports routine consumer behavior. The data shows clear demand, but it also shows that current conditions are not sufficient for the area to capture it. Improving organization, visibility, and basic site design can move Woodlawn towards becoming a place where everyday shopping and dining happen more naturally and more often.

Supportable Additional Retail Businesses by Trade Area

	PTA	STA
445110 Supermarkets/Other Grocery Stores	0.9	
455219 Other General Merchandise Retailers	1.4	1.4
456110 Pharmacies and Drug Retailers	1.9	
457110 Gas Stations with Convenience Stores	2.0	2.6
713940 Fitness/Recreational Sports Centers	0.9	0.7
722410 Drinking Places (Alcoholic Beverages)		1.1
722511 Full-Service Restaurants	4.6	5.9
722513 Limited-Service Restaurants	9.0	8.2
722515 Snack and Nonalcoholic Beverage Bars	2.2	2.2

Source: Lightcast, Camoin Associates

Market Supportable Categories

The supportable retail mix for Woodlawn reinforces a clear and important takeaway: the market's near-term strength is in neighborhood-serving, food-driven, and convenience-oriented uses. The strongest opportunities include limited-service restaurants, coffee, and quick dining, which align with short-term absorption, signaling that the market is currently under-serving everyday needs rather than lacking demand altogether.

This is a critical distinction: Woodlawn does not need to "create" demand, but rather better capture and retain it.

The scale of these opportunities also matters. Most supportable uses fall within smaller footprints, reinforcing that incremental, site-by-site reinvestment focused on filling vacancies, repositioning existing spaces, and supporting local operators will be more effective than pursuing large, ground-up retail development in the near term. This aligns with existing conditions, where aging centers and fragmented parcels make large-format redevelopment challenging without significant intervention.

At the same time, several categories with longer absorption timelines, such as grocery, pharmacy, general merchandise and fitness, point to strategic, longer-term plays tied to corridor repositioning and anchor reinvestment, particularly around major sites like Security Square Mall. These uses are less about immediate recruitment and more about shaping a future vision that can support larger tenants.

Importantly, the presence of both national and local operator potential suggests a dual-track strategy. While national brands can help stabilize and signal market confidence, many of the near-term opportunities can be captured by regional and independent businesses if supported with the right tools (capital access, technical assistance, and proactive leasing partnerships).

Overall, this analysis underscores that Woodlawn's retail strategy should focus on winning back everyday spending, improving the experience of its core corridors, and building toward larger-scale reinvestment over time.

Market-Supportable Retail Categories

Retail Category	Supportable Businesses	Typical SF Range (per business)	Absorption Outlook	Example: National Retailers
Limited-Service Restaurants	9	1,200–2,000 sf	Immediate–3 yrs	Fast Casual, QSR, Coffee - Chipotle, Wingstop, Panera, Dunkin, Starbucks
Full-Service Restaurants	4	3,000–5,000 sf	2–5 yrs	Family, Casual, Cultural Dining - IHOP, First Watch
Snack / Beverage Shops	2	800–1,800 sf	Immediate–2 yrs	Smoothie King, Crumbl, bubble tea concepts
Pharmacy / Drugstore	1–2	10,000–14,000 sf	2–5 yrs	CVS, Walgreens
Grocery (small-format)	1	30,000–50,000 sf	3–7 yrs	Aldi, Lidl, neighborhood grocer
General Merchandise / Dollar	1–2	8,000–15,000 sf	1–4 yrs	Dollar Tree, DG Market, Five Below
Gas + Convenience	1–2	2,500–5,000 sf	Immediate–3 yrs	Royal Farms, Wawa, 7-Eleven
Fitness / Wellness	1	15,000–30,000 sf	2–5 yrs	Planet Fitness, Crunch

Source: Lightcast, Camoin Associates

Summary of Market Assets, Challenges, and Opportunities

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Assets

Woodlawn's retail landscape rests on a solid base of middle-income, senior, and longtime households whose essentials-driven spending provides a reliable foundation for neighborhood retail. The district benefits from concentrated corridors (Liberty Road, Security Boulevard) that retain strong pass-by traffic and from anchors that continue to draw daily shoppers, including ShopRite/Howard Park, Security and Meadows plazas, and several well-located convenience nodes. Vacancy levels remain low relative to regional peers, and rents in select segments remain healthy, which signals that portions of the market still function effectively when visibility, access, and site quality are aligned. These fundamentals, combined with strategic adjacency to major employers and employment centers, position Woodlawn well for targeted reinvestment and gradual strengthening of its retail core.

Challenges

A notable hurdle remains the market area's slower demographic momentum, with population and household declines limiting the upside for more discretionary, lifestyle-oriented retail. Spending patterns lean heavily toward groceries, drugstores, quick dining, and personal services; few households support categories with higher margins or destination-driven formats. Aging inventory further constrains performance with many buildings dating to the 1960s–1980s. These older properties were not designed for the modern national tenants who seek drive-thru capability, subdividable mid-box footprints, or pad-site configurations that improve visibility and circulation. Although the broader corridor maintains low vacancy, churn among small tenants, inconsistent site conditions, and limited placemaking may dampen cross-shopping and shorten customer dwell time.

Constraints

Infrastructure and site design remain major limiting factors. Woodlawn's auto-oriented corridors have multiple curb cuts, constrained turning movements, and poor pedestrian environment, all of which limit the performance of restaurants and convenience retail that depend on efficient circulation. Parcels may be fragmented, and large parking areas are not easily reconfigured. Aesthetic conditions, including aging façades, inconsistent signage, minimal landscaping, and visibly dated centers, feed a narrative of stagnation that can deter investment. The long-term redevelopment of Security Square Mall presents both opportunity and uncertainty; without clear phasing and a stabilizing concept, some tenants and investors may delay decisions, slowing leasing activity in adjacent centers.

Opportunities

Even within these constraints, the retail gap analysis identifies strong opportunities, especially in food and beverage, value-oriented retail, and essential services. The market can support additional quick-service and fast-casual restaurants, several full-service family and culturally focused dining options, new snack and beverage shops, a pharmacy, a small-format grocery, and one or two value general-merchandise tenants. Gas/convenience formats have near-term viability at high-traffic intersections, while fitness concepts present a modest but achievable mid-term opportunity. Opportunities will materialize fastest where centers can accommodate pad-site development, reconfigured parking lots, modernized façades, and clearer identity. In practice, this means leveraging visible corners and functioning plazas for restaurant-forward growth while preparing anchor spaces to absorb mid-box general merchandise and wellness tenants as repositioning occurs. Together, these targeted investments can recapture leakage, extend dwell time, and position the district to benefit from the eventual lift created by long-term redevelopment at Security Square.

Business Retention and Recruitment Plan

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Business Retention and Recruitment Plan

From Analysis to Action

The Woodlawn retail market is defined by a gap between what the market can support and what the district is currently able to deliver.

The analysis shows that local households generate consistent demand for dining, convenience retail, and neighborhood-serving services. At the same time, a significant share of that spending continues to occur outside of the immediate area, reflecting ongoing retail leakage.

This gap is driven by the following primary constraints:

- A limited supply of ready-to-occupy retail space
- Aging buildings that do not meet modern tenant requirements
- A lack of coordinated strategy connecting business needs, property conditions, and market opportunity
- Underutilized village center with high vacancy and limited activation

As a result, Woodlawn is not fully capturing the economic activity that already exists within its trade area.

The Business Retention and Recruitment Plan focuses on closing that gap by building the systems and investing in the infrastructure needed to convert demand into real businesses and sustained economic activity.

Strategy Framework

Addressing Woodlawn's retail challenges requires a focused, implementation-oriented approach. The strategy is organized around four priorities that directly respond to the conditions identified in the market analysis.

- **Priority 1:** Strengthen and retain existing Woodlawn businesses
- **Priority 2:** Unlock sites for dining, grocery, and daily needs
- **Priority 3:** Position Woodlawn Village as a vibrant community hub for gathering and connection
- **Priority 4:** Activate underutilized space through maker and micro-production uses

Together, these priorities will shift Woodlawn from a reactive posture to a more intentional, market-driven approach to retail development.

PRIORITY 1

Strengthen and retain existing Woodlawn businesses.

Woodlawn would benefit from a more coordinated system to track business conditions, monitor vacancies, and align available space with evolving market demand. Establishing this kind of shared framework would allow the district to move from reacting to change, such as business turnover, vacancies, or new investment, to shaping it in a more intentional and strategic way.

Additionally, there is an opportunity to strengthen connections between property owners and business operators through a common understanding of needs, opportunities, and available space. A more aligned approach would help reduce friction in the market, support business expansion, and position the district to attract new businesses that better match market demand.

This translates into a clear next step: a proactive, place-based Business Retention and Expansion (BRE) program. This initiative is listed as the first priority because it serves as a foundation for the rest of the plan's recommendations.

A. Build a Proactive, Place-Based Business Retention & Expansion Program

1) Build the foundation (data and program)

- Develop and maintain a centralized inventory of businesses and properties using a CRM or similar tool
- Track key information, including ownership, location, availability, and space conditions
- Conduct regular outreach supported by:
  - Annual business and property owner survey
  - In-person business visits
  - Direct outreach to property owners
- Produce a concise annual "State of the District" summary to track progress and inform action

2) Identify risks and opportunities

- Track business and property information through engagement/outreach
- Provide support to businesses/property owners: Targeted marketing and digital support, as well as referrals, business planning from home-based to brick-and-mortar
- Identify parcels and properties that are suitable for key uses (i.e., limited or full-service restaurants)
- Track Business churn and transitions

3) Activate and influence outcomes

- Actively connect businesses with resources and support programs
- Work directly with property owners to align tenants with available space and bring new businesses into vacant storefronts
- Use business turnover as an opportunity to strengthen the overall tenant mix and elevate the district

4) Produce an annual "State of the Village" Report

- Target Audience: Business Community and business support providers/partners
- Include a 1-page summary of activity for skimming, keep total report to no more than 10-pages
- Include metrics collected through the BRE outreach and other sources: New Businesses Opened, Net Jobs Created, Private Investment, Building Rehabs, etc.

PRIORITY 2

Unlock sites for dining, grocery, and daily needs.

Woodlawn has a clear opportunity to translate market demand into tangible development outcomes by unlocking sites that can accommodate high-demand uses.

Market analysis and stakeholder input consistently point to dining and neighborhood-serving retail as the most significant unmet demand in the district. The primary constraint is the limited inventory of suitable, ready-to-occupy spaces. As a result, the district is currently unable to fully capture existing market demand or support the types of businesses that could strengthen its retail environment.

Addressing this challenge will require a more intentional, site-based strategy that prepares and positions a targeted set of properties for reinvestment and occupancy.

Monaghan's Pub, located in Woodlawn Village.

Strategies in this section:

A. Curate the Retail Mix

B. Identify and Prepare Viable Sites

C. Build a Recruitment Pipeline and Process

D. Aspirational Initiative: Catalyze a Signature Food Anchor

Priority Site Identification Criteria

Woodlawn should focus on a small number of sites that meet *several* of the following criteria, recognizing that not every site will meet all conditions but should demonstrate overall feasibility and potential:

- ✓ **Willing ownership:** Engaged property owners open to leasing, upgrades, and realistic deal terms
- ✓ **Strong location**: Visible sites along key corridors or nodes with access to and daytime activity
- ✓ **Right-sized, flexible space**: Ground-floor spaces that can accommodate food, retail, or daily needs uses
- ✓ **Infrastructure readiness**: Ability to support key requirements (venting, utilities, ADA, code compliance)
- ✓ **Access and functionality**: Adequate parking, pedestrian access, and service/loading capacity
- ✓ **Market alignment**: Fit for priority uses (dining, grab-and-go, small-format grocery)
- ✓ **Near-term readiness**: Vacant or available soon with a clear path to occupancy
- ✓ **Catalytic potential**: Ability to activate a node, reduce vacancy, or spur additional investment

PRIORITY 2

Unlock sites for dining, grocery, and daily needs.

A. Curate the Retail Mix

To strengthen Woodlawn's retail mix and better serve both and daytime populations, efforts should prioritize:

- Limited-service, takeout-friendly, and culturally relevant food concepts that can anchor retail clusters and generate consistent foot traffic
- Neighborhood-serving grocery, fresh food, and grab-and-go options that meet daily needs and capture workforce demand
- Clearly defined space and location requirements for each use, ensuring alignment between operator needs and available sites

These uses respond to pent-up demand and desired uses in the market area.

B. Identify and Prepare Viable Sites

To begin, concentrate efforts on a small number of priority sites with engaged and willing property owners. This targeted strategy allows for more meaningful progress and visible early wins.

Key actions include:

- Identify priority properties that are well-positioned for reinvestment or repositioning
- Work directly with property owners to address common barriers, present them with market opportunities, connect them to resources, and track progress as part of the Priority 1 BRE Program

By proactively addressing these constraints, Woodlawn can create a pipeline of "ready" sites that are more competitive and attractive to prospective tenants.

C. Build a Recruitment Pipeline and Process

With viable sites identified and prepared, the next step is to establish a more structured and proactive recruitment approach. This shifts the district from passively waiting for tenants to actively shaping its business mix. Recommended actions include:

- Package and market "ready" sites to targeted operators, supported by clear market data and demand insights
- Support local entrepreneurs—particularly those operating home-based or informal food businesses—in transitioning to brick-and-mortar spaces
- Encourage clustering of complementary uses (e.g., multiple food-related businesses in close proximity) to create stronger destinations and shared foot traffic

This approach not only attracts new businesses but also builds on existing local capacity and entrepreneurial activity.

PRIORITY 2

Unlock sites for dining, grocery, and daily needs.

D. Aspirational Initiative: Catalyze a Signature Food Anchor

As a longer-term opportunity, Woodlawn may consider pursuing a catalytic food-focused development that can serve as a destination anchor. This could include:

- Exploring the feasibility of a small-scale food hall or shared commercial kitchen concept
- Identifying development partners and potential sites
- Conducting preliminary financial analysis (pro forma) to assess viability
- Supporting interior build-out and infrastructure needed to accommodate multiple operators

Such an initiative could provide a platform for local entrepreneurs, activate underutilized space, and establish a recognizable identity for the district.

Implementation Considerations

As these strategies advance, several considerations should guide execution:

- Focus on concepts that can operate with smaller footprints and limited staffing, increasing feasibility in existing spaces
- Capture daytime population demand by aligning offerings with worker and commuter needs
- Leverage existing home-based and informal businesses as a pipeline for future tenants
- Consider interim activation strategies, such as food trucks or pop-ups, to test demand and build momentum
- Use events, open houses, and temporary activations to showcase available spaces and demonstrate “what could be,” helping both property owners and prospective tenants visualize opportunities

Together, these actions represent a shift from a passive, property-by-property leasing approach to a more coordinated, market-driven strategy. By aligning sites, operators, and demand, Woodlawn can unlock new investment, strengthen its business mix, and create a more vibrant, resilient district.

PRIORITY 3

Position Woodlawn Village as a vibrant community hub for gathering and connection.

Findings from the Woodlawn engagement process underscore the important role that retail experience, storefront conditions, and the overall physical environment play in shaping how and why people visit the area. Today, these factors contribute to a pattern of primarily single-purpose trips, rather than longer visits that combine shopping, dining, and time spent in the district.

This dynamic is particularly relevant for Woodlawn Village. With its more compact, pedestrian-friendly form, the Village is well-positioned to serve as Woodlawn's primary gathering place if supported by the right mix of businesses, coordinated infrastructure improvements, strategic marketing and branding, and intentional activation.

Positioning Woodlawn Village as a walkable, active, and visually cohesive Main Street directly addresses the barriers limiting retail spending and visitation. Beyond strengthening retail performance, this approach also creates an opportunity to establish a stronger sense of place and identity, helping the Village function as both a commercial center for local businesses and a focal point for the community.

Strategies in this section:

A. Improve the Physical Environment
B. Create Reasons to Stay
C. Activate Underutilized Space
D. Build Woodlawn Village's Identity as a Gathering Place

PRIORITY 3

Position Woodlawn Village as a vibrant community hub for gathering and connection.

A. Improve the Physical Environment

1) Continue the façade improvement program

Continuing the façade improvement program is critical to sustaining visible momentum in Woodlawn Village. Prior investments have already addressed some of the most apparent signs of disinvestment, signaling that the area is making a positive turn.

While façade grants cannot resolve all building challenges, they remain one of the most feasible and impactful entry points for improvement, particularly given aging structures and limited access to capital. SWBA's hands-on outreach and administration of the program helps property owners overcome logistical barriers and move projects from concept to completion.

Maintaining this program will ideally reinforce community support among business owners, , and potential tenants, and create a stronger physical baseline upon which other improvements can build.

2) Invest in low-cost placemaking and activation

Low-cost placemaking and activation tools offer an immediate way to improve how Woodlawn Village feels and functions while the County and other partners are planning larger investments. Visible interventions such as lighting, murals, seasonal décor, planters and landscaping, signage, or modest outdoor seating can help make the public realm feel more welcoming and encourage people to spend more time in the Village.

These tools support Woodlawn's strongest retail categories, particularly dining and personal services, by making the area more comfortable and intuitive for everyday use. Small-scale changes can reinforce the sense that Woodlawn Village is a place to spend time, not just pass through.

Importantly, temporary placemaking initiatives can allow SWBA to test ideas before committing to permanent changes. Observing how people respond provides valuable insight that can inform future streetscape, safety, and capital investments.

3) Create a small area plan for Woodlawn Village

A small area plan for Woodlawn Village would provide a framework for improving walkability, traffic circulation, and the physical relationship between businesses, streets, and nearby parks and neighborhoods. Just as importantly, it would define how people move through and experience the Village, shaping how customers arrive, where they go, and how long they stay.

The plan should translate market findings into a realistic spatial strategy that prioritizes the human experience at the ground level. This includes identifying where activity should be concentrated, how storefronts engage the street, and how the public realm supports a more comfortable and connected environment.

Within this framework, businesses function as part of a cohesive place, where uses cluster and reinforce one another to encourage movement between destinations rather than single-purpose trips. By aligning physical design with how people actually use the area, Woodlawn Village can evolve into a hub of community and economic activity.

PRIORITY 3 Position Woodlawn Village as a vibrant community hub for gathering and connection.

The small area plan also serves as a coordination tool, helping align future County-led infrastructure, safety, and redevelopment efforts with retail goals. Establishing this shared vision positions Woodlawn Village to capture the benefits of incremental investment over time.

B. Create Reasons to Stay

1) Advance Woodlawn Village as a gathering place for events and programming

Even modest, recurring programming such as food-focused events, craft fairs, seasonal activities, or community celebrations can support dining and personal-service businesses by encouraging longer stays and multi-stop visits. Increasing these activities will help elevate Woodlawn Village from a pass-through corridor to a place people intentionally choose to spend time.

Importantly, events generate near-term momentum without requiring physical redevelopment. When coordinated with other improvement efforts, additional programming will reinforce Woodlawn Village's role as a neighborhood-serving center and social focal point.

2) Meaningfully engage the local maker and artist community

Engaging the local maker and artist community offers a way to showcase businesses and talent that may not already know, including home-based enterprises or Woodlawn-based entrepreneurs operating elsewhere in the Baltimore area. This approach expands the visibility of local entrepreneurship while strengthening ties between and local creatives.

markets, pop-ups, and festivals coordinated by SWBA can lower barriers to participation and diversify what encounter locally. These opportunities allow makers to test demand, build customer relationships, and explore future brick-and-mortar possibilities in a low-risk setting.

Over time, consistent engagement can help establish Woodlawn Village as a place that actively supports local talent, culture, innovation, and small business growth. Linking makers and artists to existing businesses and events strengthens the Village's small business ecosystem and reinforces its identity as a community-rooted destination.

3) Focus business attraction and development on third places

Focusing business attraction on "third places" will support Woodlawn Village's role as a social hub. Third places are informal gathering environments distinct from a person's first place (home) and second place (work), where people can spend time, interact, and build everyday social connections.

Retail formats such as coffee shops, ice cream shops, juice bars, bakeries, and casual eateries are especially well-suited to this role. These uses align with Woodlawn's strongest demand for dining and everyday services while creating welcoming, repeat-visit destinations that encourage to linger.

PRIORITY 3

Position Woodlawn Village as a vibrant community hub for gathering and connection.

Importantly, these spaces should be designed to support multi-generational use, creating environments where children, parents, and grandparents can comfortably gather, interact, and spend time together. This may include flexible seating, safe and accessible layouts, family-friendly amenities, and a mix of activities that appeal to people of all ages.

By prioritizing third-place uses, Woodlawn Village can strengthen its identity as a place to convene with friends or meet a colleague. Over time, a concentration of these businesses can increase dwell time, support surrounding retailers, and anchor the Village as a natural center of community life.

C. Activate Underutilized Space

1) Establish the County-owned parking lot as Woodlawn's "village green"

The parking lot at Windsor Mill Road and Gwynn Oak Ave has potential to be a flexible gathering space that can support short-term efforts to create a more vibrant community life. Regular use of the space for events and informal activity is helping to reframe an underutilized asset as a shared community resource and, considering its high visibility, build awareness of Woodlawn Village.

Over time, light-touch investments such as movable seating, shade elements, landscaping, lighting, or basic utility access would increase the lot's usability and comfort for events. Occasional food trucks or small-scale vendors can further activate the space, support local businesses, and encourage to come and stay longer in the Village.

By gradually layering activity and infrastructure, the village green can evolve into a reliable event and overflow space that complements surrounding retail while remaining adaptable to future redevelopment scenarios.

2) Proactively engage property owners to address vacancy

Addressing entrenched vacancy requires consistent engagement with Woodlawn Village property owners. Conduct annual outreach to underutilized and vacant property owners to discuss site conditions, leasing challenges, longer-term ownership goals, market opportunities, etc. These conversations can help identify near-term opportunities for reuse, temporary activation, or coordinated improvements, while also surfacing barriers such as capital needs or permitting challenges. Regular engagement will position SWBA as a trusted intermediary and keep lines of communication open as market conditions evolve.

Over time, this approach will support more intentional reuse of underutilized storefronts and parcels, reduce prolonged vacancy, and align private property decisions with the broader vision for Woodlawn Village.

PRIORITY 3

Position Woodlawn Village as a vibrant community hub for gathering and connection.

3) Build Woodlawn Village's identity as a gathering place

This step focuses on consistently reinforcing Woodlawn Village as *the* place where expect events, informal gatherings, and community life to occur.

Clear, repeated cues such as consistent messaging, recognizable event locations, and coordinated communications through print ads and social media will help associate the Village with connection and shared experience over time. When people know where activity "happens," participation becomes habitual rather than episodic, strengthening the Village's role as a default gathering point.

By intentionally reinforcing this identity across spaces, events, and partnerships, Woodlawn Village can shift perceptions from a collection of individual sites to a cohesive center of community life. Establishing this shared identity supports long-term momentum by making activity feel anchored, predictable, and rooted in place.

SWBA is off to a great start with programming centered on Woodlawn Village, such as its 2025 Eco-Friendly Gardening Workshop Series.

PRIORITY 4

Activate underutilized space through maker and micro-production uses.

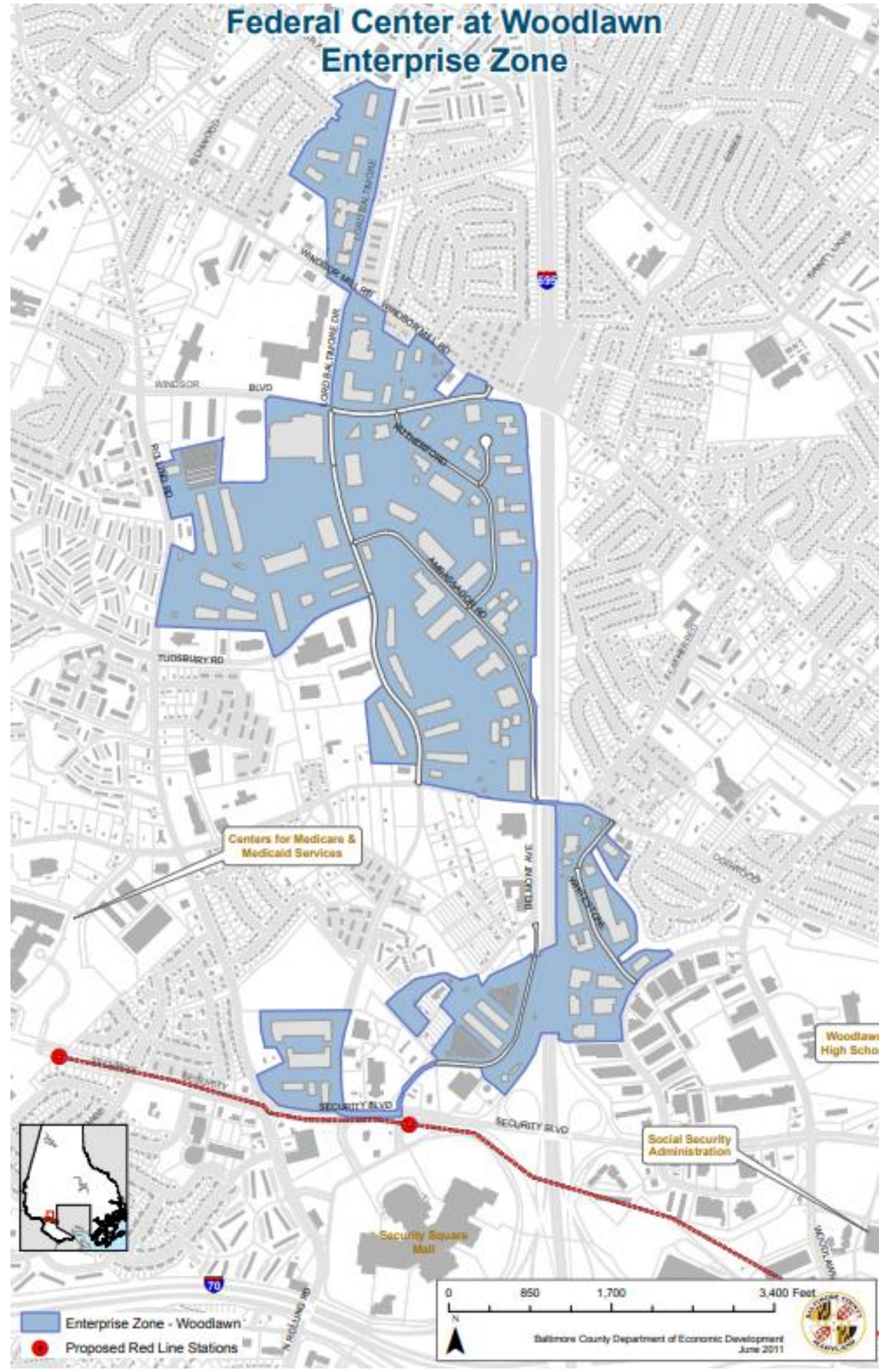
Not all spaces in Woodlawn are viable for traditional retail uses due to size, configuration, or location (which includes factors like parking and zoning constraints). As a result, some properties, particularly in or adjacent to residential areas, remain underutilized or difficult to lease. Fortunately, there are useful models of communities rethinking how to position aging infrastructure for new uses.

As an important local coordinator of business support, SWBA can help its members and prospective businesses—especially makers and micro-producers—think creatively about how to expand and repurpose underutilized spaces for new uses. For instance, Woodlawn businesses have access to tools such as tax credits through Baltimore County's Enterprise Zones to help redevelop older industrial and office areas. Expanding the range of viable building uses, particularly small-scale production, maker, and artisan businesses, creates an opportunity to reinvigorate Woodlawn with new types of business activity and strengthen the district's overall economic resilience.

Strategies in this section:

A. Identify and Prepare Maker-Ready Spaces
B. Create On-Ramps for Local Entrepreneurs
C. Integrate Small-Scale Production with the Northwest Gateways Area

Woodlawn is one of Baltimore County's three Enterprise Zones to support redevelopment of older industrial and office areas. A portion of Woodlawn's Enterprise Zone abuts one of the proposed Red Line stations near Security Square Mall, which is a promising location for businesses interested in locating near transit hubs.



PRIORITY 4

Activate underutilized space through maker and micro-production uses.

A. Identify and Prepare Maker-Ready Spaces

1) Take inventory of underutilized or hard-to-lease properties

Partner with the West Baltimore Redevelopment Authority to identify vacant or underused buildings and assess their suitability for small-scale production. Targeting these spaces taps into existing local revitalization funding streams and avoids duplicative effort. For Woodlawn, this can activate struggling commercial nodes while advancing shared revitalization goals under Northwest Gateways.

2) Match space characteristics with suitable non-retail and micro-production uses

Create a matrix of building attributes (size, utilities, access, zoning) and match them with compatible uses like woodworking, crafts, or small-batch food production. This ensures potential tenants are well-matched to available spaces, reducing turnover and vacancy periods. In Woodlawn, this approach helps local property owners and entrepreneurs make informed, practical decisions for adaptive reuse.

3) Develop a "Ready-to-Activate" building roster with basic feasibility screening

Screen 5–10 priority properties for code, utility, and zoning readiness, and produce short summary fact sheets marketing each to prospective makers. This step makes new uses feel attainable and lowers the barrier to investment. While this step can be resource-intensive, it can provide Woodlawn with a visible portfolio of opportunity-ready sites.

B. Create On-Ramps for Local Entrepreneurs

1) Support pop-ups, temporary activations, and pilot concepts

Coordinate rotating pop-up maker markets or seasonal activations in vacant storefronts or public spaces. Temporary uses allow entrepreneurs to test products, build followings, and bring energy to underused areas. In Woodlawn, this builds momentum and community familiarity with emerging local brands.

2) Explore shared or flexible spaces (e.g., commercial kitchens, maker spaces)

Assess demand for cooperative workspaces with equipment sharing, especially around food and craft production. These spaces can anchor underused sites and create ecosystems that attract steady user traffic. While complex to launch, they can become long-term assets that serve start-ups and expand job opportunities.

3) Maintain a database of artisans and micro-producers and engage through BRE program

Regularly update SWBA's business data with information on local makers and connect them with technical assistance, grants, and space opportunities. Having a structured business database strengthens your ability to respond quickly when new spaces or programs become available. For both communities, it fosters ongoing relationships and a cohesive support system for local entrepreneurs.

PRIORITY 4

Activate underutilized space through maker and micro-production uses.

4) Host "hobby to business" workshops for emerging makers

Partner with local small business support organizations to help hobbyists formalize operations, understand permitting, and access shared resources. Many already have home-based creative enterprises, but lack access to small commercial space or business guidance. This bridges that gap and prepares a pipeline of future tenants for maker-ready sites.

C. Integrate Small-Scale Production with the Northwest Gateways Area

1) Connect maker and production businesses to Woodlawn Village events and retail activity

Ensure that local makers have booths or demonstration spaces at community and retail events. This introduces to new local products and gives makers early exposure to customers. It also visually connects micro-production with the growing retail and cultural identity of both areas.

2) Position small-scale production as complementary to, not competitive with, traditional retail

Highlight the differences between retail and production users—makers enhance retail areas by offering products crafted locally, often sold via partner storefronts or co-ops. Communicating this synergy helps property owners and retailers see the shared benefit. In Woodlawn, this encourages diverse tenancy without diluting retail vibrancy.

Gwynn Oak Ave at Windsor Mill Road in Woodlawn Village is home to aging buildings that could potentially be repurposed into small-scale makers spaces.

Appendix: Additional Data

Supportable Retail Businesses, Primary Trade Area

NAICS	Description	2024 Total Demand	2024 Total Sales	Retail Leakage (Surplus)	25% Recapture	Average Sales per Business*	Supportable Businesses
Food & Beverage Stores							
445110	Supermarkets and Other Grocery (except Convenience) Stores	$36,427,465	$22,016,858	$14,410,607	$3,602,652	$3,830,832	0.9
445131	Convenience Retailers	$3,052,280	$4,857,250	($1,804,971)	($451,243)	$753,909	(0.6)
445230	Fruit and Vegetable Retailers	$738,864	$155,897	$582,967	$145,742	$1,991,522	0.1
445240	Meat Retailers	$1,063,159	$28,060	$1,035,099	$258,775	$924,851	0.3
445250	Fish and Seafood Retailers	$284,081	$0	$284,081	$71,020	$833,376	0.1
445291	Baked Goods Retailers	$479,255	$185,963	$293,292	$73,323	$1,037,436	0.1
445292	Confectionery and Nut Retailers	$416,829	$31,169	$385,660	$96,415	$1,066,729	0.1
445298	All Other Specialty Food Retailers	$2,413,949	$2,645,712	($231,764)	($57,941)	$1,634,939	(0.0)
445320	Beer, Wine, and Liquor Retailers	$2,668,314	$3,510,247	($841,934)	($210,483)	$434,857	(0.5)
311811	Retail Bakeries	$2,082,723	$234,818	$1,847,905	$461,976	$1,987,391	0.2
312120	Breweries	$4,831,584	$70,499	$4,761,085	$1,190,271	$3,886,792	0.3
312130	Wineries	$2,957,039	$0	$2,957,039	$739,260	$1,686,704	0.4
312140	Distilleries	$2,274,022	$0	$2,274,022	$568,506	$26,330,694	0.0
Health & Personal Care Stores							
456110	Pharmacies and Drug Retailers	$19,881,213	$2,113,085	$17,768,128	$4,442,032	$2,367,115	1.9
456120	Cosmetics, Beauty Supplies, and Perfume Retailers	$4,125,787	$0	$4,125,787	$1,031,447	$1,229,597	0.8
456130	Optical Goods Retailers	$1,874,449	$0	$1,874,449	$468,612	$1,696,520	0.3
456191	Food (Health) Supplement Retailers	$1,631,889	$0	$1,631,889	$407,972	$1,737,402	0.2
456199	All Other Health and Personal Care Retailers	$3,039,966	$0	$3,039,966	$759,992	$2,182,911	0.3
812111	Barber Shops	$1,458,783	$1,610,285	($151,502)	($37,875)	$1,020,678	(0.0)
812112	Beauty Salons	$10,570,066	$21,737,378	($11,167,312)	($2,791,828)	$1,109,043	(2.5)
812113	Nail Salons	$4,181,499	$7,083,574	($2,902,075)	($725,519)	$1,513,823	(0.5)
812191	Diet and Weight Reducing Centers	$308,354	$281,979	$26,375	$6,594	$737,414	0.0
812199	Other Personal Care Services	$3,477,394	$187,961	$3,289,432	$822,358	$962,114	0.9
Clothing and Accessories Stores							
458110	Clothing and Clothing Accessories Retailers	$21,016,356	$6,479,113	$14,537,243	$3,634,311	$1,452,081	2.5
458210	Shoe Retailers	$3,706,230	$3,402,378	$303,852	$75,963	$1,992,608	0.0
458310	Jewelry Retailers	$5,078,313	$854,016	$4,224,297	$1,056,074	$1,835,644	0.6
458320	Luggage and Leather Goods Retailers	$552,795	$16,765	$536,030	$134,008	$564,098	0.2

Supportable Retail Businesses, Primary Trade Area

NAICS	Description	2024 Total Demand	2024 Total Sales	Retail Leakage (Surplus)	25% Recapture	Average Sales per Business*	Supportable Businesses
Home Improvement and Furnishings Stores							
444110	Home Centers	$10,980,001	$2,450,994	$8,529,007	$2,132,252	$17,720,786	0.1
444120	Paint and Wallpaper Retailers	$1,032,709	$425,426	$607,284	$151,821	$1,978,426	0.1
444140	Hardware Retailers	$3,280,451	$995,555	$2,284,897	$571,224	$2,459,980	0.2
444180	Other Building Material Dealers	$8,345,605	$638,265	$7,707,341	$1,926,835	$4,515,089	0.4
444230	Outdoor Power Equipment Retailers	$823,380	$130,519	$692,861	$173,215	$2,657,475	0.1
444240	Nursery, Garden Center, and Farm Supply Retailers	$2,764,021	$1,652,088	$1,111,932	$277,983	$2,634,451	0.1
449110	Furniture Retailers	$5,473,065	$1,766,148	$3,706,917	$926,729	$2,428,780	0.4
449121	Floor Covering Retailers	$2,322,433	$136,621	$2,185,812	$546,453	$5,117,052	0.1
449122	Window Treatment Retailers	$465,283	$0	$465,283	$116,321	$1,082,441	0.1
449129	All Other Home Furnishings Retailers	$2,646,211	$412,273	$2,233,938	$558,485	$1,090,646	0.5
449210	Electronics and Appliance Retailers	$12,068,283	$3,207,158	$8,861,125	$2,215,281	$1,811,580	1.2
Sporting Goods, Hobby, Book & Music Stores							
459110	Sporting Goods Retailers	$5,341,915	$1,349,912	$3,992,003	$998,001	$1,914,108	0.5
459120	Hobby, Toy, and Game Retailers	$2,347,952	$34,003	$2,313,950	$578,487	$1,081,855	0.5
459130	Sewing, Needlework, and Piece Goods Retailers	$605,303	$235,824	$369,479	$92,370	$1,052,838	0.1
459140	Musical Instrument and Supplies Retailers	$838,809	$303,432	$535,376	$133,844	$1,375,119	0.1
459210	Book Retailers and News Dealers	$1,357,609	$57,047	$1,300,562	$325,141	$2,216,652	0.1
General Merchandise Stores							
455110	Department Stores	$13,356,163	$1,235,251	$12,120,912	$3,030,228	$10,558,091	0.3
455211	Warehouse Clubs and Supercenters	$27,673,218	$9,556,348	$18,116,870	$4,529,217	$35,054,062	0.1
455219	All Other General Merchandise Retailers	$9,382,631	$2,862,407	$6,520,223	$1,630,056	$1,155,234	1.4
Gasoline Stations & Fuel Dealers							
457110	Gasoline Stations with Convenience Stores	$20,718,244	$7,922,402	$12,795,843	$3,198,961	$1,624,029	2.0
457120	Other Gasoline Stations	$2,815,647	$379,485	$2,436,162	$609,041	$1,220,676	0.5
Motor Vehicle & Parts Dealers							
441110	New Car Dealers	$41,520,839	$41,983,460	($462,621)	($115,655)	$19,364,795	(0.0)
441120	Used Car Dealers	$7,482,901	$7,101,371	$381,530	$95,383	$3,322,450	0.0
441210	Recreational Vehicle Dealers	$1,739,646	$0	$1,739,646	$434,912	$2,493,349	0.2
441222	Boat Dealers	$1,281,643	$0	$1,281,643	$320,411	$2,234,139	0.1
441227	Motorcycle, ATV, and All Other Motor Vehicle Dealers	$2,590,985	$621	$2,590,364	$647,591	$7,156,048	0.1
441330	Automotive Parts and Accessories Retailers	$8,977,605	$6,769,682	$2,207,923	$551,981	$1,830,089	0.3
441340	Tire Dealers	$5,601,843	$801,626	$4,800,217	$1,200,054	$1,982,902	0.6

Supportable Retail Businesses, Primary Trade Area

NAICS	Description	2024 Total Demand	2024 Total Sales	Retail Leakage (Surplus)	25% Recapture	Average Sales per Business*	Supportable Businesses
Miscellaneous Store Retailers							
459310	Florists	$1,180,420	$1,470,305	($289,885)	($72,471)	$1,467,790	(0.0)
459991	Tobacco, Electronic Cigarette, and Other Smoking Supplies Retailers	$3,810,977	$4,837,677	($1,026,700)	($256,675)	$1,934,068	(0.1)
459410	Office Supplies and Stationery Retailers	$1,608,782	$103,950	$1,504,832	$376,208	$5,179,570	0.1
459420	Gift, Novelty, and Souvenir Retailers	$3,066,859	$222,646	$2,844,213	$711,053	$1,567,817	0.5
459510	Used Merchandise Retailers	$4,387,648	$2,465,139	$1,922,509	$480,627	$4,609,539	0.1
459910	Pet and Pet Supplies Retailers	$2,897,937	$51,234	$2,846,704	$711,676	$1,990,539	0.4
459920	Art Dealers	$869,950	$25,167	$844,783	$211,196	$1,006,916	0.2
459999	All Other Miscellaneous Retailers	$8,907,229	$10,559,459	($1,652,230)	($413,058)	$2,386,576	(0.2)
Food Services & Drinking Places							
722310	Food Service Contractors	$6,270,730	$10,844,105	($4,573,375)	($1,143,344)	$2,410,499	(0.5)
722320	Caterers	$2,158,697	$5,388,276	($3,229,579)	($807,395)	$1,448,079	(0.6)
722330	Mobile Food Services	$996,630	$15	$996,615	$249,154	$683,217	0.4
722410	Drinking Places (Alcoholic Beverages)	$2,829,887	$3,074,917	($245,030)	($61,257)	$618,612	(0.1)
722511	Full-Service Restaurants	$63,462,513	$23,396,926	$40,065,587	$10,016,397	$2,176,536	4.6
722513	Limited-Service Restaurants	$70,570,335	$10,384,720	$60,185,616	$15,046,404	$1,666,443	9.0
722514	Cafeterias, Grill Buffets, and Buffets	$581,564	$95,822	$485,741	$121,435	$523,115	0.2
722515	Snack and Nonalcoholic Beverage Bars	$5,408,719	$22,193	$5,386,526	$1,346,631	$618,518	2.2
Recreation Establishments							
512131	Motion Picture Theaters (except Drive-Ins)	$605,569	$1,482	$604,087	$151,022	$2,957,910	0.1
512132	Drive-In Motion Picture Theaters	$19,120	$0	$19,120	$4,780	$3,215,212	0.0
713120	Amusement Arcades	$556,604	$125,104	$431,500	$107,875	$2,338,442	0.0
713940	Fitness and Recreational Sports Centers	$6,439,015	$994,662	$5,444,353	$1,361,088	$1,502,866	0.9
713950	Bowling Centers	$710,066	$605,286	$104,780	$26,195	$1,150,541	0.0

Supportable Retail Businesses, Primary Trade Area

NAICS	Description	2024 Total Demand	2024 Total Sales	Retail Leakage (Surplus)	25% Recapture	Average Sales per Business*	Supportable Businesses
Miscellaneous Services							
532210	Consumer Electronics and Appliances Rental	$285,644	$0	$285,644	$71,411	$1,521,683	0.0
532281	Formal Wear and Costume Rental	$131,163	$7,807	$123,355	$30,839	$1,007,557	0.0
532282	Video Tape and Disc Rental	$221,250	$0	$221,250	$55,312	$764,922	0.1
532283	Home Health Equipment Rental	$914,859	$5,772	$909,087	$227,272	$4,023,375	0.1
532284	Recreational Goods Rental	$498,737	$0	$498,737	$124,684	$1,071,411	0.1
532289	All Other Consumer Goods Rental	$1,692,004	$113,150	$1,578,854	$394,713	$3,030,658	0.1
541921	Photography Studios, Portrait	$1,264,184	$4,132,562	($2,868,378)	($717,094)	$1,218,701	(0.6)
812310	Coin-Operated Laundries and Drycleaners	$613,814	$2,521,805	($1,907,991)	($476,998)	$546,005	(0.9)
812320	Drycleaning and Laundry Services (except Coin-Operated)	$1,404,457	$1,987,135	($582,678)	($145,669)	$1,121,536	(0.1)
812910	Pet Care (except Veterinary) Services	$3,050,404	$118,896	$2,931,508	$732,877	$797,879	0.9
812921	Photofinishing Laboratories (except One-Hour)	$136,975	$195,713	($58,738)	($14,685)	$3,928,460	(0.0)
812922	One-Hour Photofinishing	$11,719	$0	$11,719	$2,930	$295,848	0.0

*Average sales for businesses in Baltimore City and County

Source: Lightcast

Supportable Retail Businesses, Secondary Trade Area

NAICS	Description	2024 Total Demand	2024 Total Sales	Retail Leakage (Surplus)	5% Recapture	Average Sales per Business*	Supportable Businesses
Food & Beverage Stores							
445110	Supermarkets and Other Grocery (except Convenience) Stores	$255,749,965	$251,724,541	$4,025,424	$201,271	$3,830,832	0.1
445131	Convenience Retailers	$21,467,970	$38,220,160	($16,752,191)	($837,610)	$753,909	(1.1)
445230	Fruit and Vegetable Retailers	$5,194,440	$8,830,678	($3,636,238)	($181,812)	$1,991,522	(0.1)
445240	Meat Retailers	$7,473,704	$2,291,271	$5,182,433	$259,122	$924,851	0.3
445250	Fish and Seafood Retailers	$1,994,675	$1,945,766	$48,909	$2,445	$833,376	0.0
445291	Baked Goods Retailers	$3,364,386	$5,025,750	($1,661,364)	($83,068)	$1,037,436	(0.1)
445292	Confectionery and Nut Retailers	$2,925,038	$2,077,273	$847,766	$42,388	$1,066,729	0.0
445298	All Other Specialty Food Retailers	$16,970,215	$11,158,502	$5,811,713	$290,586	$1,634,939	0.2
445320	Beer, Wine, and Liquor Retailers	$18,768,359	$23,382,329	($4,613,970)	($230,699)	$434,857	(0.5)
311811	Retail Bakeries	$14,541,384	$2,715,227	$11,826,156	$591,308	$1,987,391	0.3
312120	Breweries	$35,194,479	$5,981,758	$29,212,720	$1,460,636	$3,886,792	0.4
312130	Wineries	$21,053,302	$1,496,984	$19,556,318	$977,816	$1,686,704	0.6
312140	Distilleries	$18,964,187	$20,991,485	($2,027,298)	($101,365)	$26,330,694	(0.0)
Health & Personal Care Stores							
456110	Pharmacies and Drug Retailers	$137,015,753	$126,218,661	$10,797,092	$539,855	$2,367,115	0.2
456120	Cosmetics, Beauty Supplies, and Perfume Retailers	$28,924,078	$8,903,915	$20,020,163	$1,001,008	$1,229,597	0.8
456130	Optical Goods Retailers	$13,140,059	$12,244,907	$895,151	$44,758	$1,696,520	0.0
456191	Food (Health) Supplement Retailers	$11,440,545	$6,136,640	$5,303,905	$265,195	$1,737,402	0.2
456199	All Other Health and Personal Care Retailers	$21,139,559	$20,870,793	$268,766	$13,438	$2,182,911	0.0
812111	Barber Shops	$10,146,639	$7,088,094	$3,058,546	$152,927	$1,020,678	0.1
812112	Beauty Salons	$73,523,605	$79,202,650	($5,679,045)	($283,952)	$1,109,043	(0.3)
812113	Nail Salons	$29,085,689	$31,593,018	($2,507,329)	($125,366)	$1,513,823	(0.1)
812191	Diet and Weight Reducing Centers	$2,145,372	$491,432	$1,653,940	$82,697	$737,414	0.1
812199	Other Personal Care Services	$24,201,295	$11,766,857	$12,434,438	$621,722	$962,114	0.6
Clothing and Accessories Stores							
458110	Clothing and Clothing Accessories Retailers	$147,410,549	$80,760,436	$66,650,113	$3,332,506	$1,452,081	2.3
458210	Shoe Retailers	$26,097,633	$25,722,402	$375,231	$18,762	$1,992,608	0.0
458310	Jewelry Retailers	$35,583,375	$18,489,672	$17,093,703	$854,685	$1,835,644	0.5
458320	Luggage and Leather Goods Retailers	$3,865,835	$214,258	$3,651,577	$182,579	$564,098	0.3

Supportable Retail Businesses, Secondary Trade Area

NAICS	Description	2024 Total Demand	2024 Total Sales	Retail Leakage (Surplus)	5% Recapture	Average Sales per Business*	Supportable Businesses
Home Improvement and Furnishings Stores							
444110	Home Centers	$77,423,670	$73,685,608	$3,738,062	$186,903	$17,720,786	0.0
444120	Paint and Wallpaper Retailers	$7,259,913	$6,042,270	$1,217,643	$60,882	$1,978,426	0.0
444140	Hardware Retailers	$23,107,480	$9,216,129	$13,891,351	$694,568	$2,459,980	0.3
444180	Other Building Material Dealers	$58,846,437	$43,773,601	$15,072,837	$753,642	$4,515,089	0.2
444230	Outdoor Power Equipment Retailers	$5,789,934	$522,092	$5,267,842	$263,392	$2,657,475	0.1
444240	Nursery, Garden Center, and Farm Supply Retailers	$19,460,112	$5,386,017	$14,074,094	$703,705	$2,634,451	0.3
449110	Furniture Retailers	$38,724,683	$34,903,316	$3,821,367	$191,068	$2,428,780	0.1
449121	Floor Covering Retailers	$16,359,478	$24,137,259	($7,777,780)	($388,889)	$5,117,052	(0.1)
449122	Window Treatment Retailers	$3,241,943	$290,125	$2,951,817	$147,591	$1,082,441	0.1
449129	All Other Home Furnishings Retailers	$18,673,295	$2,690,803	$15,982,492	$799,125	$1,090,646	0.7
449210	Electronics and Appliance Retailers	$85,120,088	$53,162,198	$31,957,890	$1,597,894	$1,811,580	0.9
Sporting Goods, Hobby, Book & Music Stores							
459110	Sporting Goods Retailers	$37,708,901	$10,474,448	$27,234,453	$1,361,723	$1,914,108	0.7
459120	Hobby, Toy, and Game Retailers	$16,727,753	$4,965,081	$11,762,672	$588,134	$1,081,855	0.5
459130	Sewing, Needlework, and Piece Goods Retailers	$4,216,903	$3,947,159	$269,744	$13,487	$1,052,838	0.0
459140	Musical Instrument and Supplies Retailers	$5,924,774	$3,889,320	$2,035,454	$101,773	$1,375,119	0.1
459210	Book Retailers and News Dealers	$9,579,372	$20,089,986	($10,510,614)	($525,531)	$2,216,652	(0.2)
General Merchandise Stores							
455110	Department Stores	$93,961,896	$56,845,158	$37,116,738	$1,855,837	$10,558,091	0.2
455211	Warehouse Clubs and Supercenters	$194,721,171	$72,510,518	$122,210,653	$6,110,533	$35,054,062	0.2
455219	All Other General Merchandise Retailers	$65,789,137	$32,405,662	$33,383,475	$1,669,174	$1,155,234	1.4
Gasoline Stations & Fuel Dealers							
457110	Gasoline Stations with Convenience Stores	$148,838,941	$65,890,994	$82,947,947	$4,147,397	$1,624,029	2.6
457120	Other Gasoline Stations	$20,232,919	$12,103,966	$8,128,952	$406,448	$1,220,676	0.3
Motor Vehicle & Parts Dealers							
441110	New Car Dealers	$288,966,802	$286,146,405	$2,820,398	$141,020	$19,364,795	0.0
441120	Used Car Dealers	$52,611,433	$41,634,594	$10,976,839	$548,842	$3,322,450	0.2
441210	Recreational Vehicle Dealers	$12,141,027	$1,554,491	$10,586,536	$529,327	$2,493,349	0.2
441222	Boat Dealers	$8,940,424	$2,763,906	$6,176,519	$308,826	$2,234,139	0.1
441227	Motorcycle, ATV, and All Other Motor Vehicle Dealers	$18,078,456	$6,369,696	$11,708,760	$585,438	$7,156,048	0.1
441330	Automotive Parts and Accessories Retailers	$62,540,571	$29,927,654	$32,612,917	$1,630,646	$1,830,089	0.9
441340	Tire Dealers	$39,114,648	$17,307,042	$21,807,606	$1,090,380	$1,982,902	0.5

Supportable Retail Businesses, Secondary Trade Area

NAICS	Description	2024 Total Demand	2024 Total Sales	Retail Leakage (Surplus)	5% Recapture	Average Sales per Business*	Supportable Businesses
Miscellaneous Store Retailers							
459310	Florists	$8,343,461	$9,852,731	($1,509,270)	($75,464)	$1,467,790	(0.1)
459991	Tobacco, Electronic Cigarette, and Other Smoking Supplies Retailers	$26,834,791	$17,979,371	$8,855,420	$442,771	$1,934,068	0.2
459410	Office Supplies and Stationery Retailers	$11,325,682	$27,933,904	($16,608,221)	($830,411)	$5,179,570	(0.2)
459420	Gift, Novelty, and Souvenir Retailers	$21,676,207	$15,477,963	$6,198,244	$309,912	$1,567,817	0.2
459510	Used Merchandise Retailers	$31,047,189	$28,514,242	$2,532,947	$126,647	$4,609,539	0.0
459910	Pet and Pet Supplies Retailers	$20,392,554	$4,915,499	$15,477,055	$773,853	$1,990,539	0.4
459920	Art Dealers	$6,145,924	$1,481,154	$4,664,769	$233,238	$1,006,916	0.2
459999	All Other Miscellaneous Retailers	$62,716,402	$28,401,688	$34,314,715	$1,715,736	$2,386,576	0.7
Food Services & Drinking Places							
722310	Food Service Contractors	$54,935,520	$35,982,864	$18,952,655	$947,633	$2,410,499	0.4
722320	Caterers	$18,917,897	$16,067,748	$2,850,149	$142,507	$1,448,079	0.1
722330	Mobile Food Services	$8,735,002	$679,443	$8,055,558	$402,778	$683,217	0.6
722410	Drinking Places (Alcoholic Beverages)	$24,734,383	$10,596,375	$14,138,008	$706,900	$618,612	1.1
722511	Full-Service Restaurants	$475,561,129	$218,766,035	$256,795,094	$12,839,755	$2,176,536	5.9
722513	Limited-Service Restaurants	$504,260,433	$230,019,239	$274,241,194	$13,712,060	$1,666,443	8.2
722514	Cafeterias, Grill Buffets, and Buffets	$5,100,220	$773,601	$4,326,619	$216,331	$523,115	0.4
722515	Snack and Nonalcoholic Beverage Bars	$47,362,310	$19,568,698	$27,793,611	$1,389,681	$618,518	2.2
Recreation Establishments							
512131	Motion Picture Theaters (except Drive-Ins)	$5,135,047	$770,353	$4,364,694	$218,235	$2,957,910	0.1
512132	Drive-In Motion Picture Theaters	$160,116	$334,884	($174,768)	($8,738)	$3,215,212	(0.0)
713120	Amusement Arcades	$3,904,194	$385,591	$3,518,603	$175,930	$2,338,442	0.1
713940	Fitness and Recreational Sports Centers	$46,064,748	$25,683,645	$20,381,103	$1,019,055	$1,502,866	0.7
713950	Bowling Centers	$5,082,787	$2,429,709	$2,653,078	$132,654	$1,150,541	0.1

Supportable Retail Businesses, Secondary Trade Area

NAICS	Description	2024 Total Demand	2024 Total Sales	Retail Leakage (Surplus)	5% Recapture	Average Sales per Business*	Supportable Businesses
Miscellaneous Services							
532210	Consumer Electronics and Appliances Rental	$2,044,799	$112,961	$1,931,838	$96,592	$1,521,683	0.1
532281	Formal Wear and Costume Rental	$940,790	$24,572	$916,219	$45,811	$1,007,557	0.0
532282	Video Tape and Disc Rental	$1,585,961	$418,241	$1,167,719	$58,386	$764,922	0.1
532283	Home Health Equipment Rental	$6,523,172	$9,542,172	($3,018,999)	($150,950)	$4,023,375	(0.0)
532284	Recreational Goods Rental	$3,576,334	$35,501	$3,540,832	$177,042	$1,071,411	0.2
532289	All Other Consumer Goods Rental	$12,129,406	$767,739	$11,361,667	$568,083	$3,030,658	0.2
541921	Photography Studios, Portrait	$8,783,820	$12,135,086	($3,351,266)	($167,563)	$1,218,701	(0.1)
812310	Coin-Operated Laundries and Drycleaners	$4,516,484	$5,165,002	($648,518)	($32,426)	$546,005	(0.1)
812320	Drycleaning and Laundry Services (except Coin-Operated)	$10,349,422	$8,204,847	$2,144,574	$107,229	$1,121,536	0.1
812910	Pet Care (except Veterinary) Services	$21,434,283	$370,316	$21,063,967	$1,053,198	$797,879	1.3
812921	Photofinishing Laboratories (except One-Hour)	$965,024	$868,199	$96,825	$4,841	$3,928,460	0.0
812922	One-Hour Photofinishing	$83,737	$69,333	$14,404	$720	$295,848	0.0

*Average sales for businesses in Baltimore City and County

Source: Lightcast

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Business Association