Greater Brandywine Village
MARKET ANALYSIS

AUGUST 2006

prepared for
Greater Brandywine Village Revitalization, Inc.

by

Institute for Public Administration
College of Human Services, Education & Public Policy
University of Delaware

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This report was prepared by the Institute for Public Administration (IPA), a unit within the College of Human Services, Education & Public Policy at the University of Delaware. IPA links the research and resources of the University of Delaware with the management and information needs of local, state, and regional governments in the Delaware Valley. IPA provides assistance to agencies and local governments through direct staff assistance and research projects as well as training programs and policy forums.

Projects produced by IPA are a true team effort. Martin Wollaston manages the IPA Planning Services Team. Manoj Doss functioned as project coordinator and principal drafter of the Greater Brandywine Village Market Analysis. Jonathan Justice, an Associate Policy Scientist with IPA, provided project support and drafting assistance. IPA Graduate Research Assistant Lindsey Interlante provided valuable statistical analysis and drafting support to the project.

Institute Director
Jerome R. Lewis, Ph.D.

Planning Services
Martin Wollaston, Planning Services Manager

Brandywine Village Market Analysis Team
Manoj Doss, Project Coordinator
Jonathan Justice, Ph.D., Associate Policy Scientist
Lindsey Interlante, Graduate Research Assistant

Mapping and GIS Development
Andrew Homsey, GIS Research Analyst
Jonathan Barton, Graduate Research Assistant

Editorial Review
Mark Deshon, Assistant Policy Scientist
Troy Mix, Planner
B.J. DeCoursey, Planner

Cover Design
Mark Deshon, Assistant Policy Scientist

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Executive Summary

This report presents the findings of a market analysis for the commercial district of Greater Brandywine Village in Wilmington, Delaware. The report's recommendations, as well as the underlying analyses and data, constitute a major analytic component required for developing an effective economic restructuring strategy for Brandywine Village. The full report includes

- a technical analysis of the trade area from which the business district's customers are drawn and their consumer characteristics
- the findings from a survey of the district's customers concerning their consumer preferences, perceptions of the district and its constituent businesses, and desires for enhancements to the business district
- an inventory of existing businesses in the district
- the findings from a survey of the district's business people concerning their customers, their own businesses, and their suggestions for enhancements to the business district as a whole
- other information concerning the business district, its competitive situation, and its customer base

Taken together, those elements can be used by the Greater Brandywine Village Revitalization, Inc., (GBVR) and its Economic Restructuring Committee to devise many of the elements and priorities for an initial economic-restructuring strategy for the district and inform an ongoing, dynamic strategic planning process that will continuously incorporate responses to changing circumstances and community needs. It is worth pointing out here that this report represents a necessary and somewhat technically specialized task, but one that is, nevertheless, relatively quick and easy to complete, compared with the more substantive work the committee itself will do in devising and implementing its strategy over the coming years. The experience of many other successful Main Street programs, however, has demonstrated that economic restructuring can, with time and thoughtful identification of priorities, be accomplished. This executive summary presents key findings from the study, suggestions for possible ways those findings can be used to develop some elements of an initial strategy, and suggestions for using the more detailed findings to a full strategy and a planning process.

Key Findings

Although the commercial district of Brandywine Village suffers from somewhat unfavorable current perceptions of its safety and attractiveness, it is viewed by customers and business operators alike as being a conveniently located neighborhood business district, with adequate parking and very significant potential for new businesses, such as modestly priced restaurants, a supermarket, and a bank branch or other mainstream financial-services provider. Market analysis confirms the probable viability of the retail niches, identified by customer and merchant surveys, and points to significant potential for the community to support a good-sized supermarket and other businesses. Residents of the district's primary trade area currently make most of their purchases of convenience and necessity items away from the neighborhood, at least in part because many types of neighborhood retail outlets are not presently available in or adjacent to Brandywine Village. Recapture of as little as a fifth of the estimated "leakage" of residents' purchases of convenience and daily necessity items could support 60,000 square feet of retail space, equivalent to an average-size supermarket plus five to ten specialty shops and/or restaurants. New businesses should, if possible, be capable of drawing trade from both lower-income and middle- to upper-middle-income consumers, since the residents of the trade area include two distinct demographics.

Significant aggregate income and retail sales potential exist. The primary trade area for Brandywine Village—the area from which roughly 80 percent of the district's customers are drawn—is an area of slightly more than one square mile, no part of which is more than a mile from the intersection of Concord Avenue and North Market Street. It is inhabited by approximately 20,000 residents in more than 7,000 households, with an estimated total retail sales demand (adjusted to 2006 dollars from the 1999/2002 figures in the report) of more than $100 million annually in five key categories of goods and services commonly available in neighborhood- and community-level retail centers: food purchased for home consumption, food consumed away from home, housing supplies and furniture, health care, and clothing and accessories. We estimate that only about one-third of trade-area residents' overall demand for these goods is satisfied by purchases made in Brandywine Village, leading to a total "sales gap" or "retail leakage" of over $70 million per year. The negative "sales gap" for the sixth category (personal services) indicates that customers are drawn from outside the primary trade area, perhaps to the tax-preparation office on North Market Street.

This presents significant opportunities for creating and attracting new businesses to serve local consumers and expanding existing businesses to fill targeted market gaps. If as little 20 percent of the total estimated retail leakage can be recaptured, it could support as much as 60,000 square feet of new and re-occupied existing retail business space. (This does not include the leakage or potential for attracting additional trade from the existing secondary market area, other nearby residential communities, and the several thousand commuters passing through Brandywine Village each workday on their way to and from downtown Wilmington. Additional increases will be realized as new housing is constructed and existing vacant housing is restored and re-occupied, as well.)

GBVR Study Estimated Sales Gaps, inflated from 1999 and 2002 to August 2006 dollars

Table in Text	Category of Purchase	Estimated 2006 Actual Sales	Estimated 2006 Potential Sales	Estimated 2006 Sales Leakage
15	Food at home	$19,557,133	$28,970,086	$9,412,953
16	Food away from home	3,511,233	20,724,994	17,213,761
17	Housing supplies and furniture	1.945,857	19,881,387	17,935,529
18	Health care	3,623,637	22,129,239	18,505,602
19	Clothing and accessories	1,581,666	15,162,323	13,580,657
20	Personal services	6,758,453	4,871,801	(1,886,652)
	TOTALS	$36,977,980	$111,739,831	$74,761,850

Note. Dollar amounts in this table are adjusted from the figures in the body of the report, based on changes in the consumer price index (for all urban consumers, Philadelphia-Camden-Wilmington MSA) from 1999 (the reference year for income data reported by Census 2000) and 2002 (the reference year for sales data reported by the Economic Census 2002) to August 2006. The CPI figures are 171.9 for 1999 (annual basis), 185.3 for 2002, and 216.4 for August 2006 (not seasonally adjusted). CPI data were retrieved from http://www.bls.gov, September 18, 2006. Refer to the text for an explanation of how the base figures for the sales gaps were estimated.

Trade-area household characteristics reflect a diverse population. While average and median household-income levels are lower than the statewide average and median, they are slightly higher than household-income levels in the City of Wilmington as a whole. Households in the primary trade include a relatively large proportion of very-low-income households and a large share of family households. For purposes of consumer marketing, many of the trade area's households can be placed into one of two groups: low- to moderate-income black households and moderate- to upper-middle-income white households. Detailed examination of the income data also indicates, however, that there are a significant number of more affluent black households as well, particularly in the northern quadrant of the primary trade area.

Customers' and business owners' suggestions for additional business offerings are consistent with each other and with the demographic analysis. Several findings from the customer-intercept and merchant surveys stood out in particular:

- *Convenient location*
  Brandywine Village is a convenient location both for residents of the densely populated trade area and for its close proximity to downtown Wilmington. It rates highly for ease of access and ready availability of parking.

- *Neighborhood orientation*
  Brandywine Village is a neighborhood convenience-oriented commercial district, currently anchored by convenience stores, personal services providers, a tax-preparation office, and a pharmacy. After the two general categories of "running errands" (62% of respondents) and "shopping" (49%), the primary purposes of customers' visits to Brandywine Village's commercial area were professional services (presumably the tax-preparation office), dining, the pharmacy, and cleaning and laundry services, at 24, 13, 10, and 9 percent of customers' purposes, respectively.

- *Unfilled needs present retail opportunities*
  The current range of available retail offerings is very limited, leaving several niches unfilled. Particularly desired business offerings included banking/financial services; cafes, delis, diners, and other low-price, family-oriented restaurants; and a supermarket and/or chain convenience market. (Other niches with potential include social services and professional services providers complementary to the tax-preparation outlet on Market Street, and health and personal-care providers complementary to the pharmacy. Additional possibilities are identified in the body of the report.)

- *Perceived safety is a concern*
  Perceptions of safety and security in the district need improvement and could be enhanced to some degree through design and lighting improvements as well as more visible police presence.

- *Visual improvements are desired*
  The appearance of stores and buildings was also rated relatively unfavorably by customers and identified as a priority area for improvements by merchants.

Considerations for Restructuring Strategy

The following are some preliminary ideas the Committee may wish to consider as they work to formulate a restructuring strategy that is suited to the Brandywine Village community's needs and capabilities. They are not the only ideas stimulated by the detailed content of the report, nor are the ideas in the body of the report by any means exhaustive—committee members and other members of the

Greater Brandywine Village community will have additional, often better, ideas we have not thought of—but they can be used as a starting point for discussions about strategy and priorities. Our primary recommendations here are (1) to market Brandywine Village's convenient location to consumers and businesses, (2) to attract and develop new businesses to fill identified market gaps, (3) to work with other stakeholders to improve the perceived safety of the business district, and (4) to work with stakeholders to improve the appearance of existing storefronts. Location-marketing and business-development activities should also seek to attract or develop a retail "anchor" such as a supermarket or a restaurant with a recognized brand at the earliest opportunity. Anchor businesses serve to draw consumers and can form the nucleus for clusters of related businesses.

Market the convenient location. When recruiting businesses, or encouraging existing businesses to expand in Brandywine Village, take advantage of the convenient location. This commercial district has a large base of consumer-spending potential in the surrounding residential community, is close to downtown Wilmington with its large daytime population and growing residential population, and has plenty of convenient parking for visitors who prefer to drive. For new and expanding businesses, the demographic diversity of, and significant current sales leakage from, the surrounding neighborhood offers opportunities to match residential demand with downtown employees' and visitors' demand in a wide variety of taste- and income-targeted niche businesses. In developing a specific strategy for the retail mix, consider emphasizing neighborhood convenience-type goods and services rather than comparison goods, although there may be limited opportunities for select niche businesses drawing from residents, downtown workers, and visitors to the Brandywine Park and Zoo. This means, in part, emphasizing the role of the business district in serving the day-to-day needs of residents and employees.

Attract or grow at least one family restaurant. The market analysis indicates that opportunities exist for more than one moderately-priced restaurant, but it may be desirable to begin by attracting at least one recognized, possibly limited-service, chain or franchise. Chains offer brand recognition and signal quality to consumers in ways that may also influence their perception of the location. Franchises present opportunities to combine brand recognition with locally based ownership. Wilmington's office of the U.S. Small Business Administration, the Delaware Small Business Development Center, and a variety of Internet resources are available to assist in identifying franchise opportunities and aiding local entrepreneurs.

Work to attract or grow a provider of banking services. Do not expect it to locate in the abandoned bank building, however. Contemporary financial institutions do not require this type of space for retail banking offices. The Delaware Community Reinvestment Action Coalition may be able to suggest potential service providers and offer advice on opportunities to use the Community Reinvestment Act to encourage a bank to open a branch. A credit union or community bank may also be an option to consider. The dense residential neighborhood, with a significant proportion of homeowners, and its proximity to downtown Wilmington indicate that a large potential base of depositors and borrowers is available.

A supermarket can draw enough trade to prosper but may impact the existing convenience grocery stores. Based on data from the Food Marketing Institute, it is likely that an average or smaller-than-average supermarket can operate profitably in (or adjacent to) Brandywine Village. This would involve drawing a significant share of both the current $9.4 million in annual sales leakage lost to supermarkets outside the community and, in all likelihood, some share of the nearly $20 million in annual purchases made in existing neighborhood convenience stores.

Selected Supermarket Statistics in 2005

Annual sales level to qualify as a "supermarket"	$2,000,000
Approximate average annual sales per store	$15,470,000
"Median average" store size	48,058 Sq. ft.
Approximate average annual sales per square foot	$ 322 Sq. ft.
Approximate average annual sales per square foot of selling area	$ 571/ Sq. ft.

Source: Adapted from the Food Marketing Institute, "Supermarket Facts: Industry Overview 2005," retrieved September 8, 2006, from http://www.fmi.org/facts_figs/superfact.htm

Build on the retail gravity of the existing pharmacy and other popular existing businesses. The existing pharmacy draws a significant share of the business district's consumers and should be preserved as a continuously operating business, in the event its location is designated for redevelopment. The pharmacy might also serve as the nucleus for developing a small cluster of health- and personal-care-related businesses. Possibilities include vendors of optical goods (an independent or chain optician and/or optometrist) and nutritional supplements. Also consider social- or professional-services providers that might complement the tax-preparation office, which is the neighborhood's one "export" business that draws consumers from outside the business district's trade area.

Consider a variety store or dollar store. While a dedicated housing-supplies outlet may have difficulty competing with big-box chains in nearby highway strips, a variety store with a broader array of merchandise in addition to housewares and basic hardware and tools might serve the neighborhood's needs. If significant residential gentrification occurs in the future, a specialist hardware store might specialize in materials suitable to older houses, which is not generally stocked by the national chains.

Focus on improving perceived safety. The customer and merchants surveys confirm that perceptions of crime are a concern for the business district. The response should address *perceptions* of safety at the same time as the substance of safety. Thus, for example, visual enhancements to the business district and public information to counteract fears that may be disproportionate to the actual incidence and distribution of crime are important complements to crime-prevention and -reduction efforts. In addition to working with city officials to press for improved police and other public-safety services for the community, then, consider additional tactics for enhancing perceived safety.

Crime prevention through environmental design (CPTED). There is a large and growing body of research and practice on CPTED. Key practices include attention to urban design, the design of individual properties, maintenance of public and private property (the "broken windows" theory), and efforts to increase pedestrian usage of the district's sidewalks at all hours (human behavior is an important part of the "design" of an urban environment). Some guidelines include the following.

- Enhance both actual and apparent safety by encouraging "eyes on the street" in the evening as well as during the day. Complementary tactics include encouraging businesses to maintain coordinated evening hours (this can also be an effective marketing and promotional venture), attracting businesses that tend to keep evening hours (such as restaurants), encouraging residential (re)development with entrances and windows on the business streets, maintaining a pedestrian-friendly street wall, and avoiding surface parking unless it is concealed in the interior of blocks (the nearby Job Corps facility is a prime example in nearly every respect of what *not* to do in terms of site planning for urban neighborhoods—do not allow this to be repeated). In general, do not underestimate the importance of providing a pedestrian-friendly environment in enhancing perceived safety, not only from crime but also from speeding automobiles.

- Consider mounting additional lighting designed specifically to illuminate sidewalks. Such fixtures can be mounted on existing streetlamp poles, building facades, and/or separate poles. Conventional street lamps illuminate streets acceptably but do not create adequately illuminated pedestrian environments.

- Continue, and consider augmenting, supplemental maintenance efforts. Street and sidewalk cleaning, sidewalk maintenance, placement and frequent emptying of waste receptacles are among the commonly employed strategies for improving safety perceptions indirectly by improved actual as well perceived cleanliness and order of the physical environment.

Visual strategies for individual stores. Improvements to the appearance of building facades and businesses' window displays can complement efforts to enhance perceived safety in addition to serving as marketing tools for individual businesses. There are at least two elements to this: facade improvements, tactics for which can be developed in consultation with the Design Committee, and window-display and visual-merchandising practices by merchants, for which group and/or individual instruction by one of a number of specialist consultants is worth considering.

Moving Forward

As the Committee and staff have observed, even this reduced and tentative agenda points to a challenging, multi-year process of strategic planning and implementation. The Committee should be prepared to spend some time developing and refining (and adapting to changing circumstances) its complete strategy as well as a process for keeping that strategy up-to-date. Set priorities in order to avoid becoming overwhelmed by the scope of the effort, and include some opportunities for early and visible results to keep optimism up among committee members and other stakeholders. The final section of the report offers a recommended series of tasks for using the market analysis as a tool for recruiting and developing appropriate businesses, but the committee should not be afraid to work out of sequence when it is appropriate to take advantage of emerging opportunities, such as the current development interest in the 1900 block of North Market Street.

How to use this report. This executive summary and the detailed sections that follow are tools the committee can use to provide technical information to support its restructuring efforts and serve as a starting point for continuing strategy development. In particular, it can be used to target desirable business types for recruitment or development and tailor recruitment or business-plan presentations for targeted businesses or sectors. The report also identifies several implications from the survey data for the design and promotion components of GBVR's Main Street program, as well as areas that complement those elements and the restructuring work. Further, the report is a resource the committee can use to work with developers, merchants, property owners, and other stakeholders, to provide them with information that will enable them to both maximize their profits and serve the community's interests by matching their market offerings and behavior to local needs.

Natural allies. Existing business and property owners are a natural constituency for this effort. Take advantage of their motivation as well as the significant information they possess from their own business operations. Enlist them as sources of information and ideas and as active participants in the formulation and execution of restructuring strategies. Provide them with assistance and opportunities to upgrade their merchandising practices as well as the design of their buildings, including financial incentives and training programs. Local institutions such as the hospital, other major employers, and community organizations, will share GBVR's interest in improving the local supply of retail goods and services, and in improving the business district's safety and attractiveness. The developer of the 1900 block is another potential ally, who will share GBVR's interest in improving the perceived attractiveness and safety of the district and may seek to attract tenants and homebuyers from the labor forces of area employers.

Proposed redevelopment of 1900 block of North Market Street. Work with the developer to ensure *appropriate design* (see CPTED above and below) as well as a mutually beneficial *selection of commercial tenants*. Use the information in this report and what is available from other sources to provide the developer with guidance on tenant selection and design. The developer will have an incentive to design appropriately and target suitable tenants for his space early on, which can be an encouragement and a useful bit of marketing information for the rest of the recruiting effort. Thus, this is a matter of working proactively, early, and firmly to ensure that the developer recognizes the compatibility of his profit motivation with the needs of the business district and neighborhood residents, as identified through the strategic work of GBVR, Inc., and its committees. He will find it easier to design and recruit appropriately from the outset rather than trying to rework his business and architectural plans in midstream.

Sell, sell, sell. Selling is an important part of the process. Effective advocacy of Brandywine Village as a desirable location for business and property development requires the support of technical analysis such as that provided by this report, but at a basic level it begins and ends with pure advocacy. Work to ensure that all prospects—current business people and residents as well as potential new recruits—come to adopt your own enthusiastic appreciation of the community as a place to live and do business.

Introduction

Background and Purpose

To support the economic development goals of the Greater Brandywine Village Revitalization, Inc. (GBVR), the Institute for Public Administration conducted a market analysis for the business district of the Brandywine Village. The intended use is to support the activities of GBVR's committees, especially the Economic Development Committee. It may also be used by prospective business owners as well developers. Specific goals of the market analysis include

- Identifying new retail and service opportunities both for existing business owners and prospective entrepreneurs. New opportunities include potential business-recruitment prospects as well as opportunities to diversify or expand product lines and services.
- Examining the physical layout of the neighborhood business district and its potential impact on expanded economic opportunities.
- Determining other economic restructuring activities that could enhance the competitiveness of new and existing establishments in the Brandywine area. In particular, the market information in this report is intended to help existing businesses improve their profitability by better understanding their competition and customer base. The market information also will serve as a basis for co-existing with local competition and marketing Brandywine Village businesses.

The market analysis was conducted in the context of an ever-changing market environment. There are several anticipated changes that will impact local traffic and business demand. The most notable of these changes is the construction of a mixed-use residential/commercial building. The improved building design and increase in density may bring changes to Brandywine Village that will alter the size and composition of the community's consumer segments and business mix. While the market analysis attempts to reconcile some of these anticipated changes, the evolving nature of the marketplace will require regular reassessment of market opportunities. Updating and reassessment can employ a variety of data sources and estimating techniques, including detailed demographic and customer-intercept analyses such as this one, purchase of commercially available demographic reports for the Brandywine Village trade area(s), inferences drawn from realtors' and developers' information regarding local sales and leasing, observations by Brandywine Village retailers and professional service providers, and indexing for growth in household-income levels over time.

Study Components

The following sections examine opportunities for business expansion, recruitment, and retention. Each addresses various challenges and opportunities confronting the Brandywine Village market.

Current Conditions – This section summarizes issues facing Brandywine Village's business district and the broader community.

Size and Shape of Trade Area – The trade-area analysis examines customer patterns and market factors that impact the draw of Brandywine Village's business district. The trade area defined in this section will serve as a basis for further study of market conditions.

Demographic, Economic and Customer Characteristics – Provides an overview of resident demographic and psychographic information relevant to retail, restaurant, and housing potential.

Customer-Intercept Survey - Designed with the intention of surveying local pedestrian traffic in Brandywine Village to give researchers a better idea of the frequency, purpose, and perceptions these consumers have of the area. It includes questions about transportation, purpose for visiting, frequency of service utilization, consumer ratings and assessments, preferences regarding future expansion and redevelopment, and some basic demographic information to identify target markets.

Business Owner Survey - Designed with the intention of surveying local merchants in Brandywine Village, Del., to give researchers a better idea of the concerns, opinions, and perceptions these merchants have of the area. It includes questions about their business, parking, advertising, customer base, and assessments and preferences regarding future expansion and redevelopment.

Business Inventory - Provides a foundation for describing, understanding, and restructuring the economy of a business district. This database can help in the renting and selling of property. It can assist the realtors, developers, and new businesses in efficient site selection. The retail-mix analysis examines business categories and market niches that may be underserved in the Brandywine Village area.

Analysis of Business Opportunities and Mix – Provides a more detailed examination of market potential for selected business categories. While the analysis focuses on several specific retail categories and niches, the analysis approach can be replicated for other retail categories as opportunities develop.

Conclusions and Recommendation – Incorporates findings from each of the previous sections with the intent of developing a market-driven plan for the business district. The market-driven plan focuses on the activities of business expansion, niche development, space utilization, marketing, and business recruitment.

Current Situation

This section summarizes issues facing Brandywine Village's business district and the broader community. Furthermore, this section will help set the stage for a detailed data analysis in subsequent sections.

Current Conditions

Greater Brandywine Village Revitalization, Inc. (GBVR) has been working for over eight years in pursuing an improved economic development climate in Brandywine Village. GBVR has articulated its purpose in the form of the following mission statement:

> To improve the quality of life in the greater Brandywine Village area by developing and implementing a Comprehensive Master Plan for the improvement of safety, housing conditions, transportation, economic development, and historic preservation and to coordinate the effort of various civic and governmental organizations in revitalizing North Market Street and the Greater Brandywine Village area.

In 2000, a comprehensive master plan for GBVR, facilitated by Allison Platt & Associates and Randall Gross Development Economics, was adopted by Wilmington City Council and Mayor Baker. During the revitalization planning process, GBVR established community goals and objectives. In so doing, GBVR identified its community strengths and issues. These analyses were followed by a determination of the most fundamentally important issues facing Brandywine Village in regards to economic development. GBVR identified several issues to address that can generally be grouped into the categories of safety and aesthetics.

In addition, GBVR was the catalyst for several large-scale investment projects over the following years:

- Job Corps Building (investment $4 million)
- New Castle County Habitat for Humanity Headquarters (investment $875,000)
- Residential Renewal (investment $700,000)
- "Bright Lights" program (investment $1,200,000)
- Key Restoration Project (total investment $4,500,000)
- GBVR Converts Hi-Tech Gas Station to Landscaped Parking Area (investment $600,000)
- DAF Acquires Wilmington Trust Bank Building (investment $350,000)
- North Market Streetscape Enhancement Programs (investment $1.2 million)

National Downtown Trends

According to the 2001 National Main Street Trends survey, conducted by the National Main Street Center, there are a number of trends affecting retail and downtown development in communities such as Brandywine Village. The following list describes a number of factors to be considered as a context throughout the market analysis.

- Shifting demographics (aging baby boomers, single-parent households, etc.) will change retail spending patterns.
- Older commercial districts continue to nurture independent businesses.
- Older shopping malls and strip centers are declining.
- Nationally, super stores, referred to as category killers, are generating one third of all retail sales.
- As shoppers have less time to shop, convenience is becoming paramount in importance.
- More chain stores are considering downtown or neighborhood commercial-district locations in addition to traditional mall locations.
- Niche development is increasingly important for communities to differentiate themselves within the retail landscape.

Purpose of Study and Expected Outcomes

Given the current conditions in Brandywine Village as well as the national trends, IPA has identified several expected outcomes from this market analysis process that warrant special emphasis.

- Develop an analysis that not only involves community support and input but also has a solid research foundation.
- Determine an appropriate mix of businesses that will work in Brandywine Village.
- Update some of the existing business inventory work that has already been developed (vacant space, tax parcels and ownership, property for sale, etc.).
- Develop knowledge and information that will assist existing businesses in becoming more successful.
- Determine new and complementary businesses that can succeed in Brandywine Village.
- Develop a feasibility analysis of certain types of businesses (i.e., drug stores, restaurant types, office and other services). These analyses are general assessments and may not be as detailed as lenders would require. However, these numbers are useful in assessing possible areas for business recruitment and expansion.
- Create a base of information so that Brandywine Village can produce marketing materials for proactively selling the opportunities in the community to others.
- Provide the basis for the Economic Development (ED) Committee to develop a specific strategy for economic restructuring.

Size and Shape of the Trade Area

This section describes the size and shape of Greater Brandywine Village's primary trade area. The demographic information derived from the primary trade area will be the basis for further analysis in this report.

Defining the Trade Area

Brandywine Village primary trade area is the geographic area from which the majority of the retail and service business customers (and potential customers) reside. This analysis realizes that different business types will have different trade areas. That is, some businesses will draw customers from a greater distance than others. Nevertheless, for analytical purposes, one geographic area needs to be defined that reflects the overall market area for the community. This unique geographic area will be used as Brandywine's primary trade area. Local, year-round residents provide the majority of spending potential for most communities. For some convenience businesses, the primary trade area may represent 90 percent of the customers. For destination-shopping businesses, the primary trade area may represent less than 50 percent of the customers. For market analysis purposes, an overall average of 75 percent of all customers is used to establish a community's primary trade area. The secondary trade area will represent up to 95 percent of customers.

In addition to local residents, commuter employees who work at local businesses (such as downtown Wilmington) represent a sizable market segment for communities like Brandywine Village. While many of these employees live outside of the primary trade area, they need to be recognized as an important market segment, as they provide the potential to make purchases in Brandywine Village.

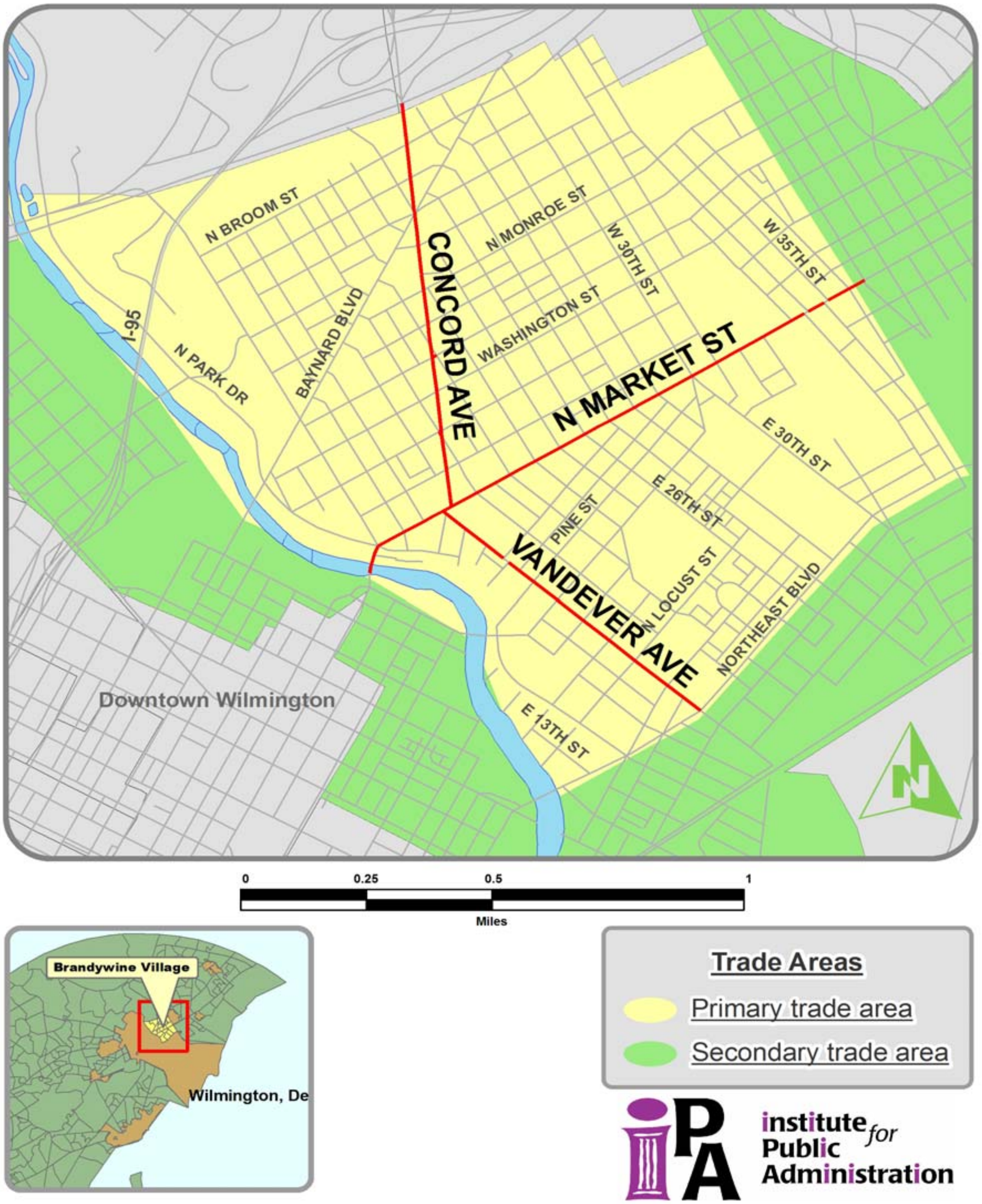
Customer Origins

Two methods for defining a trade area were applied. First, customer zip codes were gathered and analyzed. These zip codes were obtained from answers provided for the customer-intercept survey. The second method applied to defining the trade area was a theoretical approach based on natural and psychological boundaries. The methods were combined to delineate the primary and secondary trade areas.

Information from these businesses and customers were mapped and analyzed using Geographic Information Systems (GIS). Other people who do business in Brandywine Village—such as people visiting friends/relatives, traveling businessmen/women, tourists and some distant employees—represent important consumer markets that are not shown on these maps.

Mapping customer and employee zip codes provides one estimate of the "community" trade area. As previously mentioned, we must recognize that each business has a unique trade area. Furthermore, people residing in the trade area may purchase certain goods and services outside the area, while transient customers may purchase goods and services in Brandywine Village. However, this method does have distinct advantages, as it is based on actual data rather than relying entirely on a theoretical model. The following map depicts the results of the analysis.

Greater Brandywine Village Trade Area



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Conclusions

IPA studied the customer-origin data along with the GIS maps. As a result, the majority of the 19802 zip code area was chosen as the best approximation of Brandywine Village's overall trade area, based on the generation of a high percentage of customers and a separation from competing market areas. The subsequent primary trade area is shown on the preceeding map[1] and is used throughout the remainder of this analysis as the basis for data collection.

[1] Trade area defined by the Block Groups in the following Census Tracts: Census Tract 2 Block Groups 4,5,6; Census Tract 3; Census Tract 4; Census Tract 5; Census Tract 6.01; and Census Tract 6.02.

Trade-Area Characteristics

This section provides key economic, demographic, and lifestyle data for the Brandywine Village trade area defined in the previous section. This data, and the trends revealed, are important, as they have a direct impact on the potential sales of retail goods and services. This section also summarizes economic, employment, and highway data about Brandywine Village and its surrounding trade area.

Demographic and Economic Characteristics

Population and household data are the basis for quantifying the current market size and growth trends, both of which are necessary to determine consumer demand. Population is defined as all persons living in a geographic area. Households consist of one or more persons who live together in the same housing unit, regardless of their relationship to one another (including all occupied housing units). Growth trends in households or population may indicate future opportunities for business expansion and/or recruitment. Table 1 shows population and household data for 2000 and 1990. The figures indicate that Brandywine Village has declined in population and number of households over the previous decade.

Table 1. Population and Households

Brandywine Village Trade Area	1990	2000	Percent change
Population	20,219	18,743	-7.9
Households	7,669	7,267	-5.5

Source: U.S. Census Bureau 1990 and 2000, Summary File 1

Household composition is important in identifying various retail opportunities. Households can be composed of people living alone, families with or without children, single-parent households, or a number of unrelated people living together. For instance, households with children generally will spend more money on children's clothes and food, while married households without children will spend more on appliances and home furnishings. Accordingly, Table 2 describes the various types of household units within the Brandywine Village trade area.

The Brandywine Village trade area has a relatively large percentage of family households (63%). Married couples comprise 46 percent of all families and tend not to have any children under the age of 18. Female householders with no husband are another dominant group, which account for 44 percent of all families. Of these households, a vast majority have children under the age of 18. The larger percentage of family households is contrasted by a much smaller percentage of non-family households (37%). One-person households represent a smaller percentage of households in Brandywine Village than in the City of Wilmington.

Table 2. Households Composition

Household Composition	Number	Brandywine Village %	Wilmington %
Average household Size	2.58	N/A	N/A
Non-Family	**2,718**	**37.4**	**44.5**
1-person household	2,251	31.0	37.1
Family	**4,549**	**62.6**	**55.5**
with children under 18 yrs.	3,927	54.1	27.1
married couple family	2,110	29.1	26.6
No own children under 18 yrs.	1,252	17.2	89.0
female householder, no husband	2,022	27.8	23.8
with children under 18 yrs.	1,076	14.8	14.0
Average family size	3.25	N/A	N/A

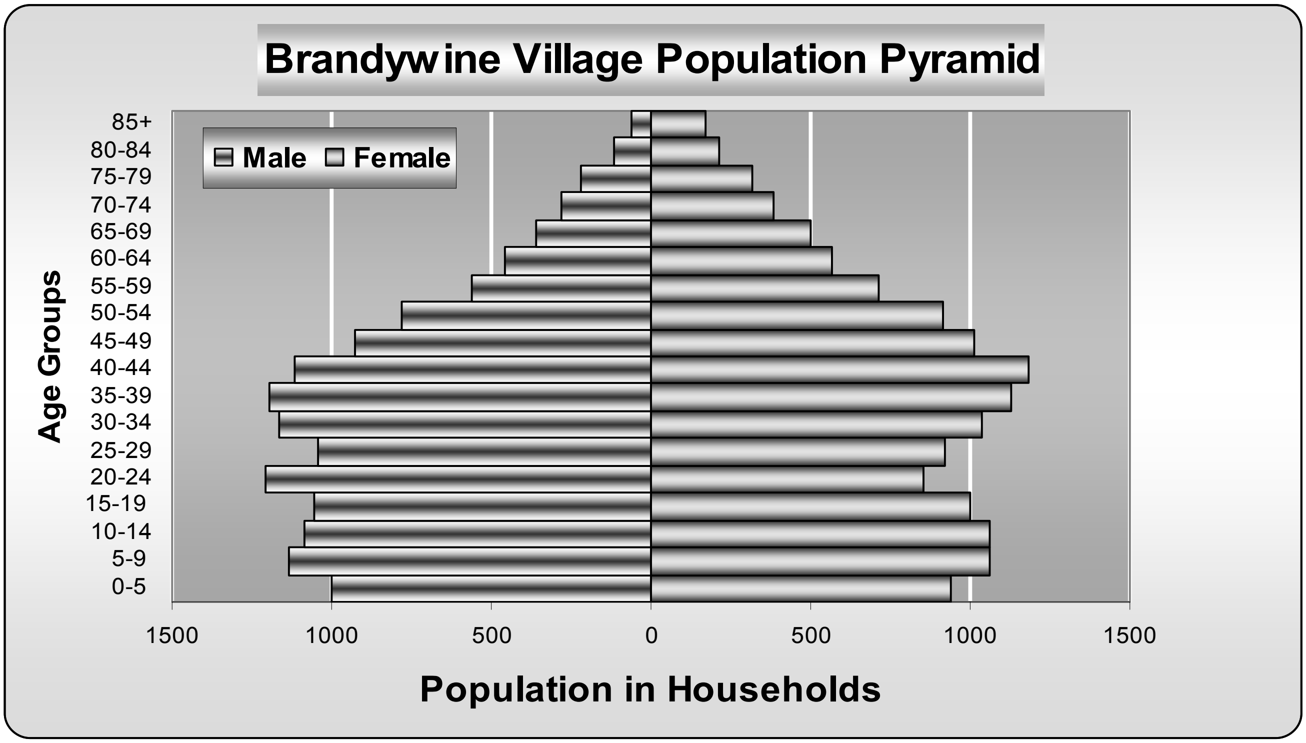
Source: U.S. Census 2000, Summary File 1

Expenditures and consumer preferences change with age. For instance, drug stores and assisted-care services often flourish in areas with a large elderly population. Toy stores, daycare centers, and stores with baby-care items are successful in areas with many children and infants. Clothing stores and fast-food establishments thrive in retail areas that contain a large concentration of adolescents. Likewise, specialized entertainment and recreation options have an opportunity to target certain age segments.

Age Distribution

The following charts and tables illustrate the age distribution in the Brandywine Village trade area. On average, those residing in the trade area are younger than residents of the city and state. The trade area has 30 percent of its population age 18 and under, while the city has 28 percent and the state 21 percent. Again, this younger population is contrasted with the population age 65 or more (14%), which is slightly higher than the city (12%). Given the number of single-mother family households (shown in the previous table), the younger population distribution is not surprising.

Figure 1. Population Pyramid



Source: U.S. Census 2000, Summary File 1

Further analysis showed that 50 percent of the white population was between the ages of 25 and 59. In addition, only 22 percent of the white population was below the age of 24, compared to 28 percent above the age of 60. These statistics reflect a trend among the nation's downtown and neighborhood commercial districts.

Figure 2. Population Pyramid: White

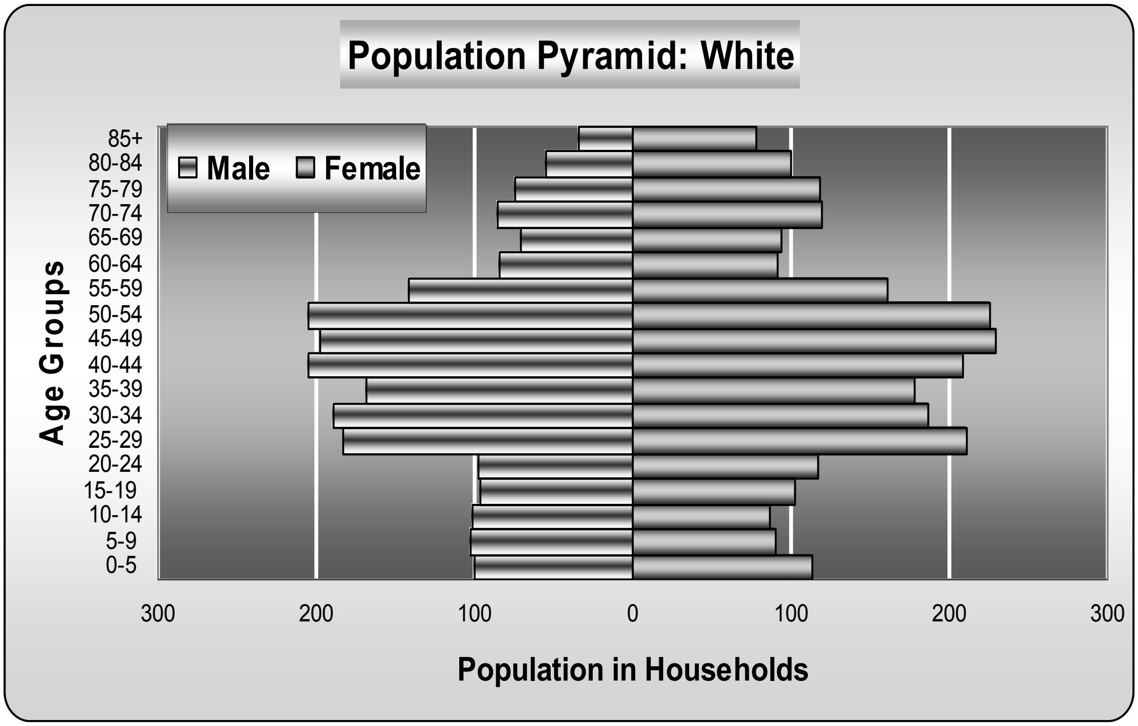


Table 3. Age Groups

	Brandywine Village		Wilmington	
Age Group	**Male %**	**Female %**	**Male %**	**Female %**
0-5	3.6	3.4	3.6	3.4
5-9	4.1	3.8	3.8	3.8
10-14	3.9	3.8	3.7	3.8
15-19	3.8	3.6	3.6	3.6
20-24	4.4	3.1	3.6	3.1
25-29	3.8	3.3	4.1	3.3
30-34	4.2	3.7	4.1	3.7
35-39	4.3	4.1	3.9	4.1
40-44	4.0	4.3	3.7	4.3
45-49	3.3	3.6	3.2	3.6
50-54	2.8	3.3	2.6	3.3
55-59	2.0	2.6	1.9	2.6
60-64	1.6	2.0	1.5	2.0
65-69	1.3	1.8	1.3	1.8
70-74	1.0	1.4	1.1	1.4
75-79	0.8	1.2	0.9	1.2
80-84	0.4	0.8	0.6	0.8
85+	0.2	0.6	0.4	0.6

Source: U.S. Census 2000, Summary File 1

Housing Tenure

Housing tenure refers to the number of owner-occupied and renter-occupied housing units. The occupancy rate relates the number of housing units that were occupied in 2000 and reveals the number of seasonal housing units. These statistics are valuable in analyzing the potential for a variety of products and services. For instance, home ownership directly correlates with expenditures for home furnishings and home equipment. Home improvement, furniture, appliances, hardware, paint/wallpaper, floor covering, garden centers, and other home products often prosper in active housing markets. The Brandywine Village trade area has a modest percentage of owner-occupied housing. Furthermore, the trade area also has a very small percentage of vacant housing for sale when compared to the state.

Table 4: Housing Tenure

Housing Units	Number	Percent
Total	8213	N/A
Occupied	**7267**	**88.5**
Owner	4166	57.3
Renter	3101	42.7
Vacant	**946**	**11.5**
for rent	359	37.9
for sale	101	10.7
rent/sale	95	10.0

Source: U.S. Census 2000, Summary File 1

Household Income

Household income is a good indicator for the spending power of residents. Household income positively correlates with retail expenditures in many product categories. Retailers may consider the median or average household income in a trade area or seek a minimum number of households within a certain income range. Another common practice is to analyze the distribution of household incomes. Discount stores avoid extreme high- or low-income areas. Traditional department stores often focus on markets with median incomes over $35,000, while some specialty fashion stores target incomes above $75,000. A few store categories, including auto parts, are more commonly found in areas with lower household incomes. It should be noted, however, that using income as the sole measure of a market’s taste preference can be deceptive. Other factors that should be included when determining taste preferences include education, ethnicity, and age. Therefore, these figures are presented as part of a series of data about the district’s population.

Table 5. Household Income in 1999, Primary Trade Area

Household Income	Number	Brandywine Village %	DE %	Difference %
Total Households	7,245	100	100	100
Less than $10,000	1,102	15.2	7.1	8.1
$10,000 to $14,999	520	7.2	5.1	2.1
$15,000 to $19,999	329	4.5	5.5	-1.0
$20,000 to $24,999	491	6.8	5.9	0.9
$25,000 to $29,999	479	6.6	6.0	0.6
$30,000 to $34,999	515	7.1	6.2	0.9
$35,000 to $39,999	411	5.7	5.7	0.0
$40,000 to $44,999	419	5.8	5.7	0.1
$45,000 to $49,999	430	5.9	5.5	0.4
$50,000 to $59,999	698	9.6	9.9	-0.3
$60,000 to $74,999	611	8.4	11.4	-3.0
$75,000 to $99,999	628	8.7	12.0	-3.3
$100,000 to $124,999	359	5.0	6.4	-1.4
$125,000 to $149,999	123	1.7	3.0	-1.3
$150,000 to $199,999	63	0.9	2.5	-1.6
$200,000 or more	67	0.9	2.1	8.1
Average HH Income	$45,800	N/A	N/A	N/A
Avg. HH Inc: White	$51,891	N/A	N/A	N/A
Avg. HH Inc: Black	$42,766	N/A	N/A	N/A

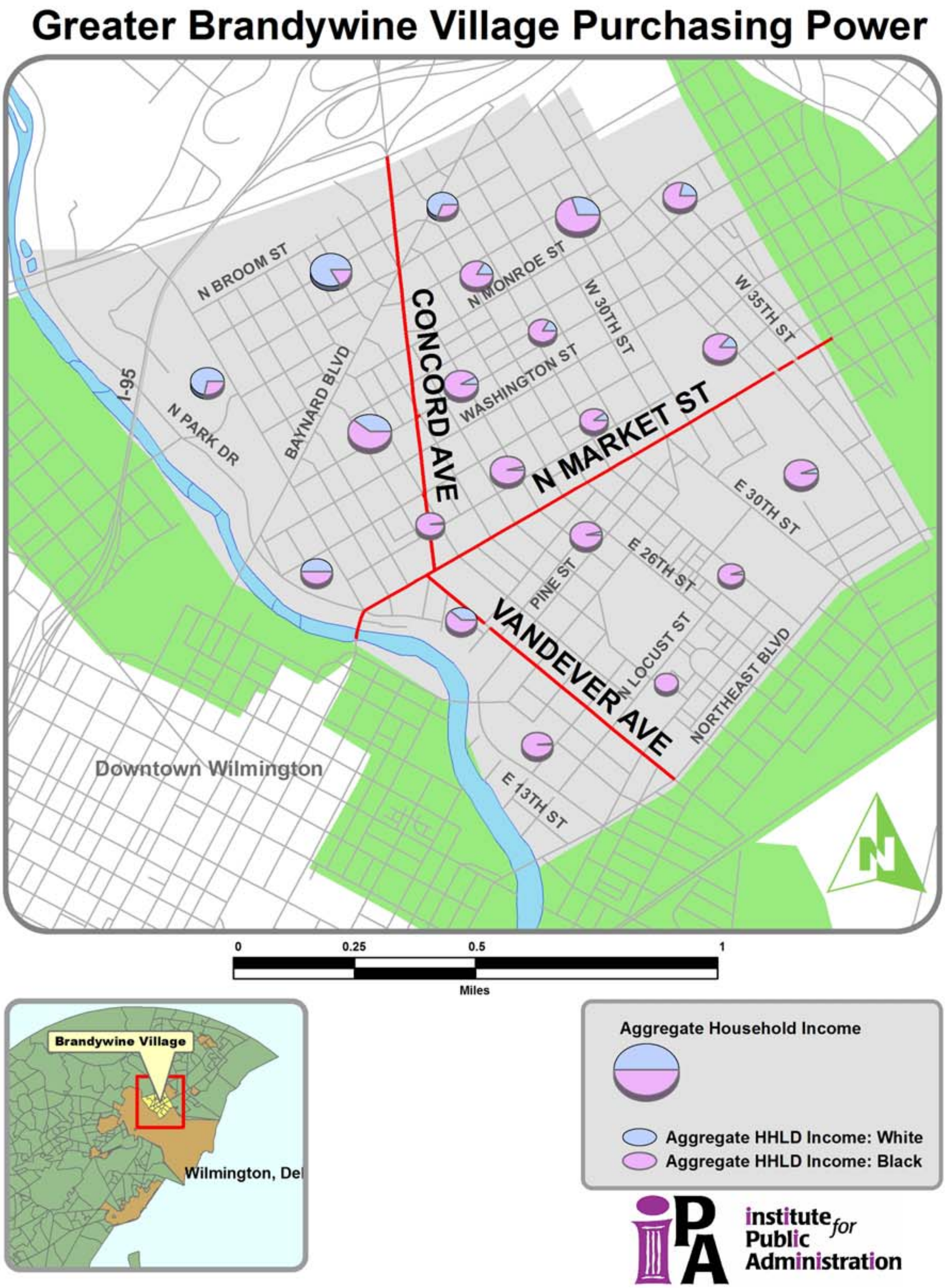
Source: U.S. Census 2000, Summary File 3
Note: Income figures are based on sample data. Totals estimated from the sample, such as the number of househods above, may not exactly match the full-count enumeration data in Summary File 1.

The income distribution among the primary trade area's census-block groups is worth noting. The two major racial groups that comprise Brandywine Village are whites (23% of households) and blacks (74%). While other racial and ethnic groups are present, they account for fewer than four percent of households and so do not represent a significant consumer base. As indicated in the chart above, the overall average 1999 household income in the primary trade area was approximately $46,000. Median household income was approximately $37,000. For comparison, Delaware's median household income was $47,381, and the U.S. figure was $41,994. However, prospective developers and businesses should acknowledge that two broad categories of households contribute to this average: (1) white, middle- to upper-middle income, and (2) black, lower-income to middle class. This is reflected in the primary trade area as white and black average (approximately $52,000 and $43,000, respectively) and median (approximately $45,000 and $34,000, respectively) incomes. Note, however, that there are limits to this marketing characterization: four of the five block groups with median household incomes of at least $50,000 each had a majority of black households.

Aggregate household income levels for the individual block groups in the primary trade area are represented on the map on page 22 by the size of the pie graphs for each block group, while the divisions within the pies indicate the relative shares for white and black households. Median household incomes for the block groups track aggregate incomes only very roughly, due to varying densities of occupied housing units among block groups in the trade area. With some exceptions, median household incomes increase as one moves from south to north, and the share of aggregate income represented by white households is greatest west of Concord and Vandever Avenues.

For the larger 19802 zip code tabulation area (ZCTA), most of which is taken up by the overall trade area (primary and secondary areas) for Brandywine Village, a total of 9,941 households had an average 1999 income of $45, 978. Median household income for the ZCTA was $36,057, with the median for households headed by householders at $42,116 and for black- or African-American-headed households at $32,808. These figures are slightly higher than those for the city as a whole ($35,116, $41,961, and $29,569, respectively). As in the primary trade area, the discrepancy between back- and white-headed households' median incomes was smaller in ZCTA 19802 (where black households' median income was 78% of white households') than it was in the City of Wilmington (70%) or New Castle County (67%).

Figure 3. Household Purchasing Power of Brandywine Village



Educational Attainment

Educational attainment is another way to determine the socioeconomic status of an area. Because income increases with educational attainment, many retailers focus on income levels rather than education. One exception is bookstores, which are often sited by developers based on the number of college-educated individuals in the trade area. Similarly, computer and software stores are often located in areas with high levels of education.

While the Brandywine Village trade area does share many similar values in education levels with the City of Wilmington overall, there are a few telling differences. The most notable is that Brandywine Village (21%) has a smaller percentage of people with college degrees compared to the city (26%). Another difference is in the percentage of residents with associate degrees. Likely, this difference is representative of the number of office support jobs in the area considering the percentage of residents that also work in the 19801 and 19802 zip codes. Among the degree-holding categories, the percentage with professional-school degrees in Brandywine Village is very similar to that of Wilmington. According to the 1990 U.S. Census, 4.5 percent of Brandywine Village residents had at least a graduate degree. By the year 2000, the percentage had climbed to just over six. This could be an indication of gentrification that has been driven by the movement of those aged 45 and above into the city.

Further analysis revealed that about 42 percent of white householders 25 years and older had at least a bachelor's degree. In contrast, over 36 percent of the black population 25 years and older had a high school diploma, and almost 29 percent had not reached that level. The income differential between black and white residents of the trade area is paralleled by a difference in levels of education. More than two-fifths of whites over 25 earned a bachelor's degree or greater compared to only nine percent of blacks. Among black residents, 86 percent had no more than a high school diploma, compared to 52 percent of white residents.

Behind the low education levels of black residents, there may be an opportunity. Approximately 22 percent of blacks in Brandywine Village have some college experience, three percent more than their counterparts in Wilmington. An organization devoted toward aiding the continued education of minorities may be able to break down the barriers that obstruct the obtainment of a degree.

Table 6. Educational Attainment

Educational Attainment	BV Total	BV %	Wilmington %
25 years and over	12,198	N/A	N/A
No diploma	3,152	25.8	25.6
High school graduate (includes equivalency)	4,028	33.0	30.1
Some college: less than 1 year	829	6.8	6.5
Some college: 1 or more years, no degree	1,649	13.5	12.1
Associate degree	611	5.0	4.3
Bachelor's degree	1,171	9.6	12.9
Master's degree	466	3.8	5.2
Professional-school degree	217	1.8	2.1
Doctorate degree	75	0.6	1.2

Source: U.S. Census 2000, Summary File 3

Many retailers use the concentration of white or blue-collar workers as another gauge of a market's taste preferences. Specialty apparel stores thrive in middle- to upper-income areas and areas with above average white-collar employment levels. Second-hand clothing stores and used-car dealerships are successful in areas with a higher concentration of blue-collar workers. Office supply stores, large music, and video stores are especially sensitive to the occupational profile. These retailers target growth areas with a majority of white-collar workers.

Employment Characteristics

Table 7 presents the breakdown of the trade-area residents' occupations by industry. It should be noted that this distribution reflects workers living within the trade area but not necessarily working in Wilmington. There is a large percentage of people working in the educational industry. This indicates that the employees of Wilmington Hospital, the local nonprofit agencies, and the local schools have a large influence on the Brandywine Village housing market. Retail trade is represented at a higher rate in Brandywine Village than in the city, meaning that local retailers live close to their stores. However, these differences are offset by a higher percentage in traditionally white-collar sectors such as finance, insurance and real estate and professional services.

Table 7. Employment by Industry (Percent of respective population)

Industry	Brandywine Village %	Wilmington %
Employed civilian population 16 years and over		
Agriculture, forestry, fishing and hunting, mining	**0.5**	**0.2**
Construction	**4.1**	**4.2**
Manufacturing	**8.7**	**9.6**
Wholesale trade	**1.4**	**2.2**
Retail trade	**11.1**	**9.4**
Transportation and warehousing, utilities	**4.6**	**3.8**
Information	**2.0**	**2.3**
Finance, insurance, real estate and rental, leasing	**14.5**	**14.9**
Finance and insurance	12.7	13.1
Professional, scientific, management, administrative, waste management services	**10.8**	**12.4**
Professional, scientific, technical services	5.0	6.9
Administrative and support, waste management services	5.6	5.4
Educational, health, social services	**23.8**	**21.1**
Educational services	9.0	6.7
Health care and social assistance	14.8	14.4
Arts, entertainment, recreation, accommodation, food services	**7.2**	**8.5**
Other services (except public administration)	**5.0**	**5.3**
Public administration	**6.2**	**6.5**

Source: U.S. Census 2000, Summary File 3

Analysis of employment by job category reveals that management, professional, and related occupations account for nearly a third of the workforce. Of that group, about 13 percent reported to work in the financial operations field, which indicates a strong relationship between Wilmington downtown jobs and employed Brandywine Village residents. The prevalence of administrative support staff also reflects this relationship. Note the high percentage of professional employees despite the modest median and average household income levels, which were largely attributable to the significant share of housholds reporting incomes under $10,000. The primary trade area's labor force–participation rate of 63.2 percent is similar to the national average (63.9%) and better than that for Wilmington as a whole. The trade area's unemployment rate was nine percent, better than Wilmington's overall (9.6%), although nigher than the national rate (5.8%), as reported by the 2000 U.S. Census.

Table 8. Employment by Job Category

Job Category	Brandywine Village %	Wilmington %
Management, professional, and related occupations	**31.0**	**33.0**
Management, business, and financial operations	12.6	14.1
Management occupations excluding farms	7.4	8.8
Business and financial operations	5.1	5.3
Business operations specialists	2.8	2.6
Financial specialists	2.3	2.7
Professional and related occupations	18.4	19.0
Computer and mathematical	1.8	1.8
Community and social services	2.8	2.6
Legal occupations	1.4	2.3
Education, training, library	5.0	1.9
Healthcare practitioners and technical	3.7	3.2
Service occupations	**21.8**	**21.6**
Healthcare support occupations	3.3	3.0
Protective service occupations	3.4	3.4
Food preparation and serving occupations	5.7	6.3
Building and grounds cleaning/maintenance occupations	5.4	5.3
Personal care and service occupations	4.0	3.7
Sales and office occupations	**28.3**	**27.2**
Sales and related occupations	8.6	8.5
Office and administrative support occupations	19.6	18.8
Construction, extraction, and maintenance occupations	**6.5**	**5.9**
Production, transportation, and material moving	**12.2**	**12.1**

Source: U.S. Census 2000, Summary File 3

Commuter Patterns

Small communities with large employers often have a significant daytime population comprising commuters. With large employers such as Bank of America, this is a reality for Brandywine Village. These in-commuters offer the retail and service businesses in a community an additional market opportunity to generate sales. According to year 2000 data from the U.S. Census Bureau, Wilmington had a net inflow of 41,696 employees from surrounding communities, representing approximately 57 percent of all employees working in Wilmington. Furthermore, the most logical route for those commuting from the Brandywine Census County Division (CCD), Philadelphia, Pa., Delaware County, Pa., and New Jersey into the city is through Brandywine Village via Concord Avenue (U.S. Rt. 202) or N. Market St. (U.S. Rt. 13). Although it is impossible to be exact, commuters from these areas may account for nearly a quarter of all daily commuters into downtown Wilmington.

Table 9. Daily Commuter Patterns by Planning District

New Castle County Commuting Patterns												
CCD to CCD	***Workplace***	Wilmington	Brandywine	Lower Christina	Piedmont	Pike Creek	Greater Newark	Upper Christina	New Castle	Cent. Pencadr	Red Lion	MOT
Residence												
Wilmington		12,597	3,546	1,517	1,063	598	1,738	1,438	3,096	285	60	161
Brandywine		7,027	12,704	1,713	1,227	454	1,435	1,338	2,663	254	96	110
Lower Christina		3,894	1,596	3,504	739	1,046	1,271	1,131	2,276	219	64	177
Piedmont		2,594	1,629	1,227	2,689	749	1,094	880	1,076	138	55	59
Pike Creek		4,014	1,774	2,545	1,104	2,917	2,260	1,877	2,233	940	173	162
Greater Newark		3,931	2,066	1,787	1,021	1,643	11,617	3,201	2,932	834	252	292
Upper Christina		1,750	1,053	1,003	298	519	2,236	2,209	1,940	333	78	123
New Castle		6,742	2,926	2,792	931	1,130	4,331	3,641	10,883	1,022	478	407
Cent. Pencader		2,164	1,356	1,079	342	451	2,953	1,889	2,515	1,440	50	232
Red Lion		287	223	145	31	94	314	260	515	71	280	71
MOT		1,553	825	831	207	310	1,551	1,170	1,789	461	299	2,655
County to CCD												
Kent (Del.)		488	487	47	74	236	733	422	1,212	248	262	934
Sussex (Del.)		181	59	141	24	14	124	104	274	73	24	111
Chester (Pa.)		2,587	2,887	1,261	423	365	1,698	1,048	1,033	318	44	144
Delaware (Pa.)		1,943	3,004	589	344	188	496	716	940	68	68	82
Phila (Pa.)		590	498	80	22	4	103	145	246	19	15	0
Cecil (Md.)		1,633	880	1,194	446	425	4,842	1,319	1,738	1,010	140	278
Camden (N.J.)		293	274	108	8	0	84	95	254	26	18	10

Source: WILMAPCO Data Report #3, 2000

Traffic Counts

Based on a statistical analysis conducted by DelDOT, eight groups have been established to represent the traffic characteristics of all roads on the road inventory network. These traffic-pattern groups (TPG), ranging from TPG 1 through TPG 8, were assigned to all roads in the state of Delaware. The Traffic Group associated with North Market Street and Concord Avenue has been identified as TPG 2; its patterns are described in the table below. On weekdays, approximately 30 percent of the daily traffic passes through Brandywine Village between 3 p.m. and 7 p.m., compared to approximately 22 percent from 6 a.m. to 10 a.m. This is of particular interest because it suggests that many daily commuters take an alternative route into the city in the morning. A reason for the dissimilarity could be that some commuters prefer a different route to obtain goods or services not available through Brandywine Village, such as coffee and doughnuts. More than half of the daily traffic passes through the district in the late morning and afternoon on the weekends. The following section discusses factors that will capture the spending of the "rush" traffic.

Table 10. Daily Traffic Summary

Hourly Distribution of Average Annual Daily Traffic (AADT)			
Hour Beginning	Average Weekday %	Average Weekend %	Average Traffic - All Days %
24:00	0.7	1.6	0.9
1:00	0.4	1.1	0.6
2:00	0.3	0.7	0.4
3:00	0.3	0.5	0.4
4:00	0.6	0.5	0.5
5:00	1.5	0.7	1.2
6:00	3.8	1.3	3.1
7:00	6.4	2.2	5.2
8:00	5.8	3.3	5.1
9:00	4.9	4.7	4.8
10:00	5.1	6.1	5.3
11:00	5.8	7.2	6.2
12:00	6.4	7.9	6.8
13:00	6.3	8.0	6.7
14:00	6.5	8.0	6.9
15:00	7.2	7.8	7.3
16:00	7.9	7.6	7.7
17:00	8.1	6.9	7.7
18:00	6.5	6.3	6.4
19:00	5.0	5.3	5.2
20:00	4.1	4.4	4.2
21:00	3.2	3.7	3.4
22:00	2.0	2.7	2.3
23:00	1.3	1.8	1.5

Beginning/Breaking Point on N. Market St.	**2004 AADT**
18th Street	12,363
Concord Ave., Rd. 4	14,031
N. Wilmington Limits	11,509

Source: Delaware Dept. of Transportation Traffic Summary 2004

Commuter Spending

Commuter expenditures will vary based on commuter characteristics and their travel time to places of employment. In general, commuters are inclined to spend a significant amount on gasoline, maintenance and repairs, groceries, food from restaurants, and other retail purchases away from home. These expenditures point to significant expenditure leakage from a commuter's home community.

Often commuter expenditures are made in establishments not traditionally associated with commuting. Commuters have a positive impact on furniture stores, general-merchandise stores, apparel stores, auto-parts stores, building-material stores, grocery stores, and other miscellaneous retailers. While the overall impact will vary by community, it is vital for Brandywine Village to develop strategies for capturing commuter dollars.

The magnitude of spending that a community can capture from in-commuters depends on whether commuters are prone to spend their money near their place of work or near their residence. For many products and services, the factors that influence a commuter's decision on where to shop are based on convenience and minimizing drive time. Influential factors include the following[2]:

- Availability of specific retail and service businesses in the host community that may not be available in the commuter's home community
- Location along key commuting routes and on the appropriate side of road during drive time
- Clear visibility of the business
- Traffic speed, traffic lights and dedicated turn lanes that help the commuter access a site
- Open hours during primary commuting time (early morning, late afternoon)
- Drive-through windows (banks, dry cleaners, take-out food, pharmacies, etc.)
- Chain affiliation that has an appeal and is recognized by out-of-town commuters
- Convenient parking that allows commuters to park in sight of the door
- A critical mass of other businesses that make a stop more convenient for the commuter

It is important to remember that not all commuters are the same. The demographics and lifestyles of in-commuters will dictate what they will buy. As with any consumer segment, business operators must always pay attention to their building's appearance, management and personnel, and overall service.

Finally, expansion or development of retail and services for commuters does not necessarily require highway strip development on the edge of town. In the case of Brandywine Village, unused retail

[2] *Source: Martin Shields and Steven C. Deller, "Commuting's Effect on Local Retail Market Performance." Reveiw of Regional Studies 28(2), 1998: 71-79*

locations within walking distance to places of employment, such as the Job Corps, offer commuters the opportunity to make their purchases before (or after) they embark on their commute.

Consumer Lifestyle Characteristics

An analysis of demographics can provide basic information about consumers in the trade area. However, the trade-area residents can be assessed in detail by examining lifestyle segmentation information. Lifestyle segmentation systems reveal the buying habits and preferences of consumers in the trade area. One specific lifestyle segmentation system, ACORN (A Classification of Residential Neighborhoods), was acquired from the Environmental Systems Research Institute's (ESRI) Business Information Solutions to provide useful information about households in the trade area. Consumers are classified into 43 demographic and behaviorally distinct clusters. The clusters are based on the type of neighborhood (urban, suburban, rural), the residents' socioeconomic status (age, income, occupation, type and value of residence), and their buying behaviors and preferences. ACORN data is updated annually using various national and local data sources.

In the Brandywine Village trade area, the overwhelmingly predominant consumer classification is "Urban Row". This ACORN segment, along with "Main Street USA," and "Old and Newcomers," comprises the majority of the trade area. These three segments are described below.

Characteristics of Segment 54: "Urban Row"

Row houses are characteristic of "Urban Row" neighborhoods, which are found in large cities in the mid-Atlantic region. Built decades ago, few of these homes have undergone gentrification. The median home value is $62,600, and most of the homes are owner-occupied. Vacancies are above average. The median occupant age is 33. Because many homes have been in the family for generations, only a small proportion of households have a mortgage. Major improvements need to be made on many homes; however, "Urban Row" residents generally can afford minor or critical repair work only. They rarely eat out. Although cable television service is available in most of these neighborhoods, many residents do not subscribe. When "Urban Row" residents watch TV, news and game shows are the most popular programs. They enjoy reading the tabloids and listening to news radio stations. Basketball is the most commonly played sport.

Characteristics of Segment 24: "Main Street, USA"

"Main Street USA" residents typify the American population. They are families and a growing mix of single-person households. They have a median age of 36 years and a comfortable income with a median of $50,000. Most are homeowners (64%) living in older, single-family homes with a market value of $165,000. They are suburbanites who live in smaller metropolitan cities. Active members of the community, "Main Street USA" residents participate in fund-raising and volunteer programs. They enjoy taking day trips to the beach, visiting a park or the zoo, or occasionally taking a domestic vacation. They invest in tools bought at Home Depot or Lowe's to complete small home-improvement and remodeling projects. They rely on the Yellow Pages or the Internet for information about restaurants, stores, and contractors. Therefore, maintaining and publicizing an informative website is an essential tool.

Characteristics of Segment 36: "Old and Newcomers"

"Old and Newcomers" neighborhoods are in transition, populated by renters who are starting their careers or retiring. Many householders are either in their twenties or above the age of 75. The median age of 36 years simply splits this age difference. Spread throughout U.S. metropolitan areas, "Old and Newcomers" neighborhoods have more single-person and shared households than families. Many residents have moved recently. Mid- or high-rise apartment buildings constructed in the 1970s dominate the housing market. The purchase choices of "Old and Newcomers" residents reflect their unencumbered lifestyles as singles and renters. Compact cars are preferred by these non-family households. Cats are the preferred pets because of apartment living. Among markets with median household income below the U.S. level, this segment has the highest readership of books. Depending on their age, they play sports such as racquetball and golf in addition to jogging or walking.

Their social group consists of a mix of old and young, homeowners and renters, families and singles who have settled in the nation's satellite cities. They share a middle-class status and a lifestyle heavy on leisure and recreation. Some have college educations. The members of "Old and Newcomers" tend to be big fans of home-centered activities: computer surfing, video renting, TV viewing, and playing games and musical instruments. Outside their homes, they go to movies, museums, and bowling alleys frequently. At home they enjoy gardening, reading books, watching public television, and entertaining neighbors over barbecues. When they go out, it's often to a local museum, the theater, or a casual-dining restaurant.

Customer-Intercept Survey

In order to gauge patron opinions of Brandywine Village, a customer-intercept survey was conducted. Survey work began on December 11, 2005, and lasted until March 1, 2006. Customers were randomly chosen and surveyed at all hours of the day, the earliest at 9 a.m. and the latest at 8 p.m. This broad range of dates and times was selected in order to gain the most diverse sample possible. The survey was designed with the intention of surveying local pedestrian traffic in Brandywine Village to give researchers a better idea of the frequency, purpose, and perceptions these consumers have of the area. It included questions about transportation, purpose for visiting, frequency of service utilization, consumer ratings and assessments, preferences regarding future expansion and redevelopment, and some basic demographic information to identify target markets. Overall, 135 individuals participated in the survey.

Timing and Purpose of Visits

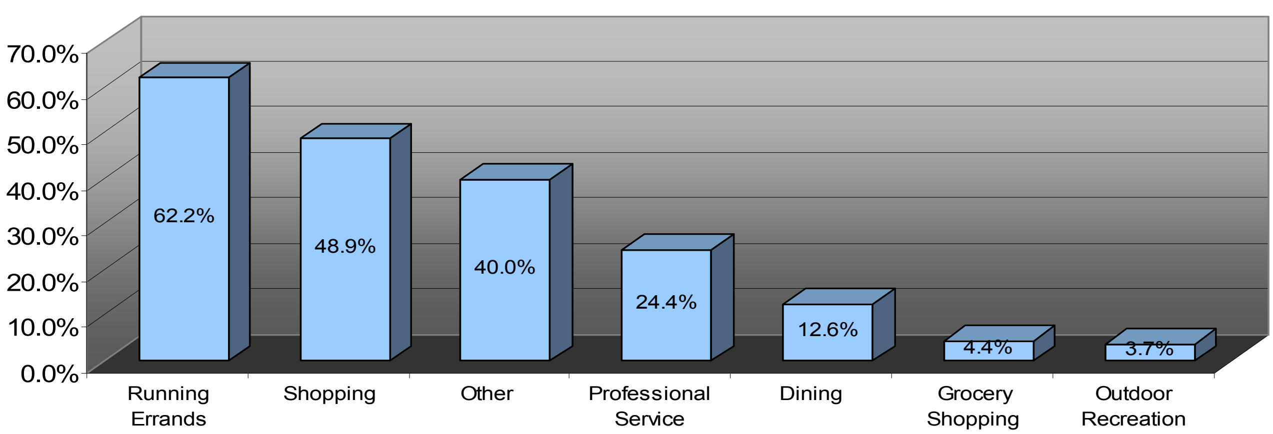
Transportation

Analysis of survey results indicated that 45 percent of respondents drove to Brandywine Village, 27.5 percent walked, 21.7 percent took the bus, and 5.8 percent had other means of transportation.

Purpose of Visit

The survey offered respondents six stipulated choices plus a seventh, "other—please specify" category. Of those who revealed the purpose of their visit to Brandywine Village on the day they were surveyed, the majority (62.2 %) indicated that they had come to run errands. Another 48.9 percent came to shop, 24.4 percent for professional services, and 12.6 percent for dining. Only 4.4 percent shopped for groceries in Brandywine Village, and just 3.7 percent pursued outdoor recreation activities. Forty percent of respondents selected "other," and the most commonly specified of these other purposes were utilizing the pharmacy (10.4%), the dry cleaner or Laundromat (8.9%), traveling to work (8.2%), and visiting the senior center (5.9%). Note that the purpose of visit question allowed for multiple responses, so that the totals here add to more than 100 percent. Figure 4 illustrates these findings.

Figure 4. Purpose of Visit



Frequency of Visits

Of those respondents who identified their frequency and reasons for visiting Brandywine Village, 78.5 percent indicated that they never shop for groceries in Brandywine Village. Many respondents utilize Brandywine Village one or two times a week for running errands (52.6%) and shopping (45.2%). Just over seven percent of respondents utilize professional services in Brandywine Village three to four times per week.

Table 11. Frequency of Visits by Purpose

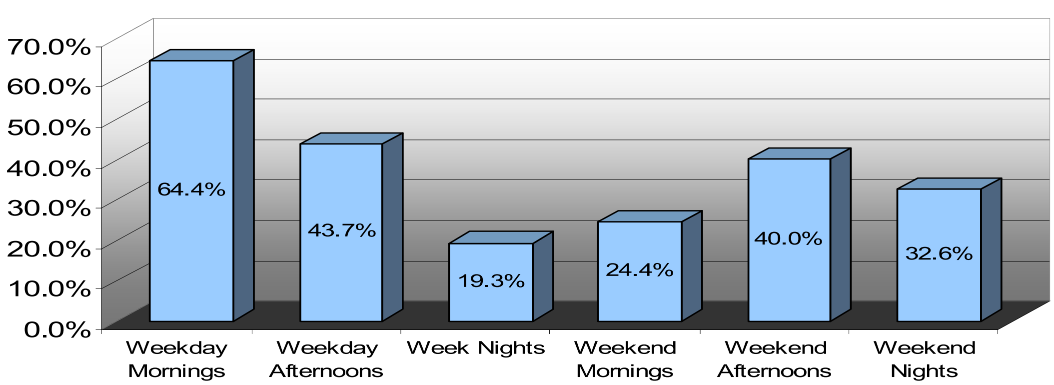
How often do you come to Brandywine Village for the following?						
	3-4 times per week	**1-2 times per week**	**2-3 times per month**	**Once a month**	**Less than once a month**	**Never**
Grocery Shopping	3.0%	9.6%	4.4%	3.0%	1.5%	78.5%
Shopping	3.7%	45.2%	16.3%	2.2%	2.2%	30.4%
Professional Services	7.4%	8.9%	24.4%	5.2%	0.0%	54.1%
Dining	5.2%	24.4%	7.4%	3.7%	3.0%	56.3%
Running Errands	5.9%	52.6%	10.4%	0.7%	3.0%	27.4%
Outdoor Recreation	2.2%	8.9%	0.7%	0.7%	3.7%	83.7%
Other (specify)	3.0%	3.7%	2.2%	0.7%	0.0%	90.4%

Source: IPA Customer Intercept Survey, 2005

Convenient Times to Visit

A majority of respondents (64.4%) identified weekday mornings as the most convenient time to visit Brandywine Village. Weekday afternoons were convenient for 43.7 percent of those surveyed. Generally, fewer respondents preferred to visit Brandywine Village during the weekend.

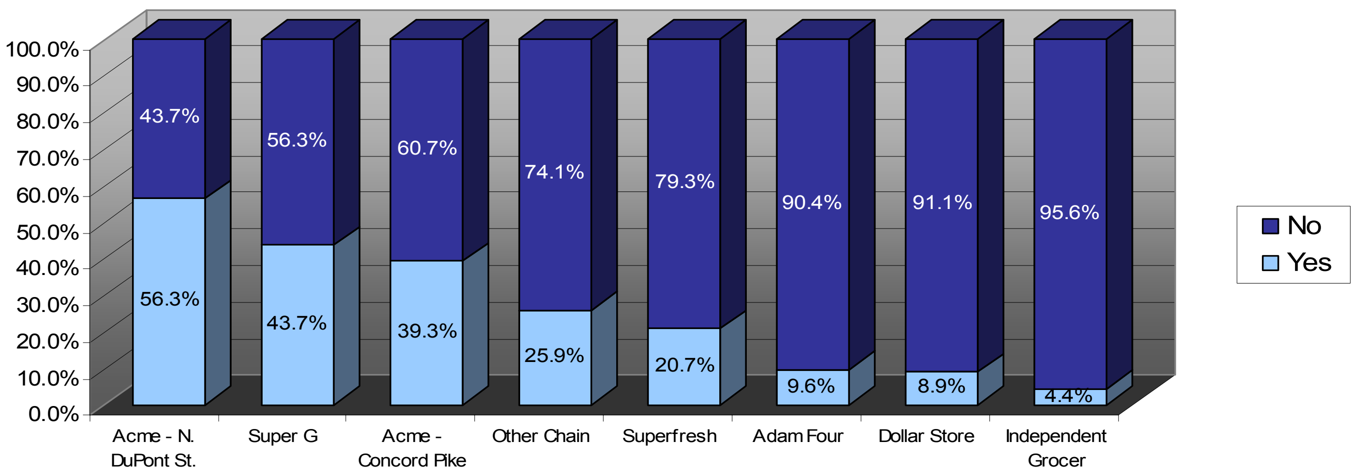
Figure 5. Convenient Times to Visit



Grocery Shopping

Of those who responded, 56.3 percent indicated that they shop for groceries at the Acme on North DuPont Street, approximately two miles away from Brandywine Village. Super G was the second most frequently utilized store. It is located over five miles away from Brandywine Village. Acme on Concord Pike is frequented by 39.3 percent of respondents and is located just over three miles away.

Figure 6. Grocery Stores Utilized by Brandywine Village Patrons



One important factor to note regarding Figure 6 is that both Adam Four and Dollar Store were identified by respondents in either the “Other Chain” or “Independent Grocer” category. However, because a significant number of respondents explicitly wrote in these stores, they were both included in the graph. It is very possible that additional respondents also shop at these stores and did not note them because they were not included in the options.

Customer Ratings

Respondents were asked to rate various characteristics of Brandywine Village on a scale from one to five, one being the lowest ranking and five being the highest. Analysis of these ratings indicated low overall scores, most of which were between two (bad) and three (okay). The areas that received the highest ratings were cleanliness and store hours. Safety and security ranked very poorly, as did the variety of stores and places to eat.

Table 12. Brandywine Village Ratings[3]

Feature	Average Rating
Cleanliness	3.26
Store hours	2.99
Sidewalks	2.95
Parking availability	2.94
Traffic congestion	2.91
Lighting	2.87
Merchandise quality	2.76
Appearance of stores and buildings	2.75
Store variety	2.46
Safety and security	2.33
Variety of places to eat	2.19

Influences on Shopping Decisions

Of those respondents who indicated what influenced their utilization of Brandywine Village, an overwhelming majority (80.7%) indicated that they were patrons because of the location. An additional 63 percent indicated that parking convenience influenced their shopping. Only 12.6 percent said that they shop in Brandywine Village because of the quality. Store sales, retail mix, and special events ranked very low (all below 4%) and were not designated as shopping influences.

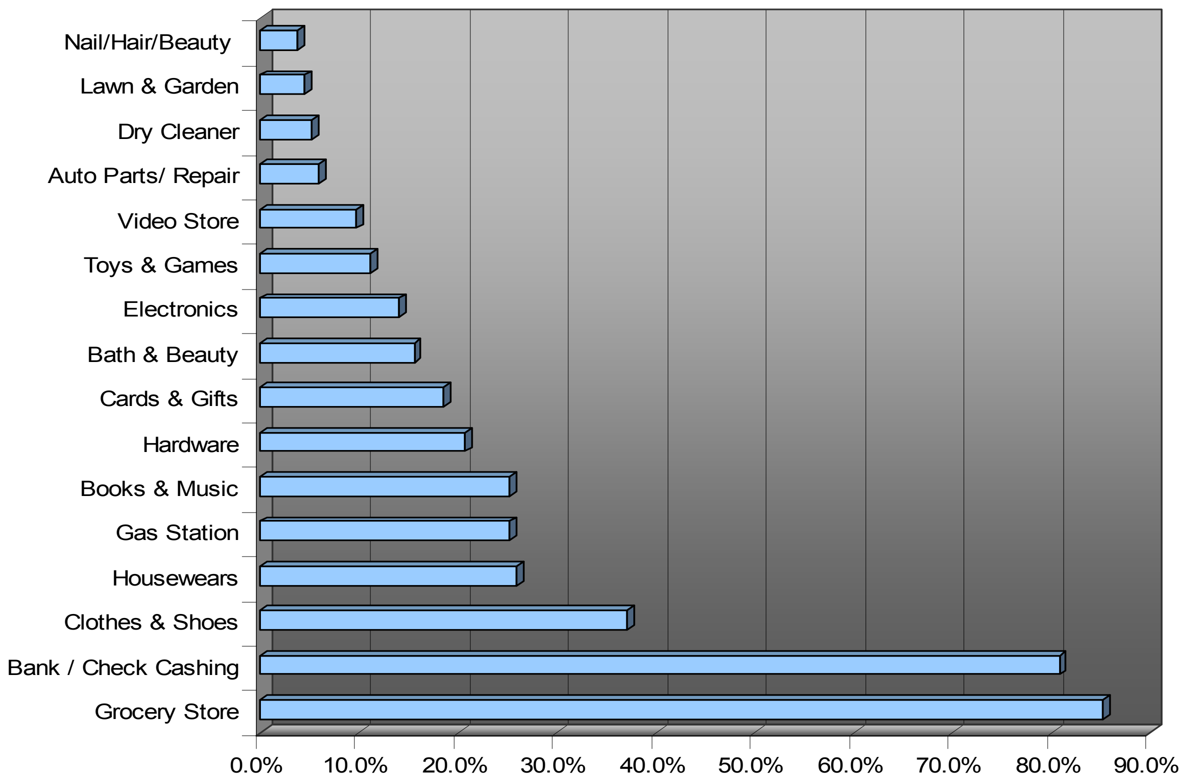
[3] Based on a scale of 1 to 5, where 1 is "Very Bad" and 5 is "Very Good."

Additional Destinations Desired

Additional Stores Desired

Over 80 percent of respondents specified the need for both a grocery store and banking services in Brandywine Village, as the area is currently deficient in these services. Other categories received some support, such as clothing and shoes, but it was very clear that such additional businesses were not a main priority for residents and potential patrons.

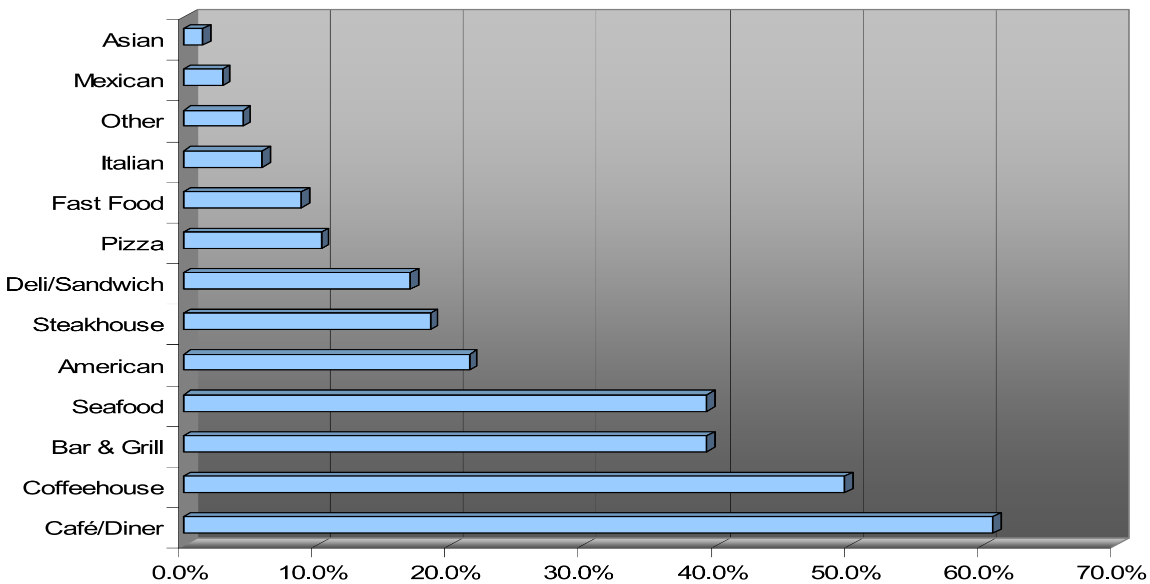
Figure 7. Additional Stores Desired



Additional Restaurants Desired

Respondents generally advocated the addition of either a café/diner or coffeehouse to the Brandywine Village neighborhood. Both a bar and grill and seafood restaurant were also listed as desirable to almost 40 percent of respondents. Most respondents also indicated that they would prefer to have a sit down restaurant in the Brandywine Village area and were opposed to another take-out food establishment.

Figure 8. Additional Restaurants Desired



Conclusions

Brandywine Village's Best Characteristics

A majority of respondents indicated that the best thing about Brandywine Village is its location. Specifically, respondents cited convenience, proximity to downtown, and the fact that it is easily accessible from their homes and their work. Over half of the respondents have lived in the area for five or more years. Many of these respondents cited this as being advantageous, as they are familiar with the people in the area and the local merchants.

Brandywine Village's Worst Characteristics

Respondents generally indicated dissatisfaction with the lack of variety in Brandywine Village, particularly in terms of shopping and restaurants. A large majority of respondents indicated that they were extremely dissatisfied with the lack of grocery and banking services in Brandywine Village. Approximately 18 percent of respondents are very unhappy with safety and security, and many specifically cited problems with drinking and drug use on the streets. The physical appearance of the neighborhood was cited by others as being problematic. One respondent described the problem as being "the physical appearance of some older, delinquent homes and abandoned buildings."

Business-Owner Survey

A key ingredient in local economic revitalization is a commitment to and support of existing businesses. An understanding of these businesses must go beyond the information collected in the business inventory. This section summarizes the results of the Brandywine Village business-owner survey. The survey was conducted during the winter of 2006 with the goal of identifying issues facing business operators in the community.

Key Findings

The business-owner survey was designed by IPA at the onset of the market-analysis process. The survey was distributed to all businesses in Brandywine Village with a response rate of about 50 percent. The goal of the survey was to identify issues and red flags facing businesses in Brandywine Village. The survey examined issues including daily operations, business climate, labor issues, and new opportunities for Brandywine Village. The responses are summarized below.

- Almost 80 percent of respondents stated that their current customers were local residents.
- Approximately 40 percent of respondents indicated that their business has increased over the past five years, while about 60 percent noted that business had either stayed the same (30%) or declined (30%) during the same period. A few reasons respondents gave for the increase in business were the addition of more services, remaining open more hours, and an increase in the elderly population (pharmacy). Some noted causes of business decline or stagnation were: increased competition, the economy, and 9/11 (Brandywine Village Market).
- Most respondents (85%) indicated that they have mostly had the same customers over the past five years.
- Nearly 70 percent of respondents indicated that parking was not a problem for their customers, and 100 percent specified that it was not an issue for their employees.
- Business owners were asked to rate the effectiveness of various advertising methods. The following table displays those results.

Table 13. Advertising Effectiveness

Effectiveness of Advertising Methods [4]	
newspaper advertising	2.86
radio advertising	2.71
group promotions	2.71
window displays	3.38
word-of-mouth	4.75
yellow pages	2.88

[4] Based on a scale of 1 to 5, where 1 is "Very Bad" and 5 is "Very Good."

- Businesses owners were asked to provide reasons why consumers currently shop in Brandywine Village. Some responses given were
  - Convenience (close proximity to office, church, or daycare)
  - Close to home
  - Close to work
  - Convenience, proximity to the Brandywine Park
  - Food, to get their hair done, for prescriptions
  - People live here, people work here, it's close to where they live and work
  - Local business for local workers and residents, also attract thrift shoppers from the area
- Businesses owners were asked to provide reasons why consumers would not shop in Brandywine Village. Some responses given were
  - Fear of crime, open drug usage
  - Dangerous after 5 p.m., not clean, too many churches and no stores
  - High prices, lack of variety, parking
  - They don't know the businesses are here
  - Fear of area, crime reported in paper
  - Not enough merchants, unappealing businesses
  - Crime, unattractive, no good shops
  - Crime, early shutdown of the village area itself, not enough advertising of Brandywine
  - Location and parking, lack of variety of stores, vacant businesses
- Businesses owners were asked what kinds of new businesses they would like to see open in Brandywine Village. Some responses given were
  - Upscale restaurant
  - Local bank
  - A supermarket
  - Cafe or deli style dining with nice decorating and ambiance
  - General store
  - Gourmet deli
  - Wawa (nice food market)
  - Fast food
  - Clothing store
  - Sporting goods
  - Coffee shop
  - Office supply store
- Improvements that local business owners would like to see include
  - Increased visibility of police/roving security
  - New sidewalks and lights

  - Parking, street lights, cut crime
  - Improve the East side of 1900 block of N. Market St. and the Concord/Market/Vandever intersection
  - More beautification projects with community input, more police presence
  - Refurbished buildings
  - More lighting
  - Cut down on hold-ups and robberies, more crime prevention
  - Corner store (at 20th street) cleaned up, cut down on loud music on street
  - Additional trashcans along street

- Almost 40 percent of the respondents stated that they would not be interested in low-interest loans to make improvements to their establishments. When merchants were asked what factors limited the expansion or improvement of their businesses, the most cited reason was financial resources.
- Businesses in the upper district, east of 23rd Street, were less willing to coordinate efforts with other businesses to spruce up the area by improving building interiors, exteriors, signs, etc., than businesses from the lower district between the Brandywine Creek and 23rd Street. Similarly, lower district businesses were less willing to volunteer time, services, and/or products to the revitalization effort.
- Only ten percent of the respondents thought that Brandywine Village had a good or excellent selection of goods. Similarly, most business owners felt that there were inadequate places to eat. Business owners also felt that Brandywine Village could use more employment opportunities and additional community promotions. However, Brandywine Village rated very low in business owners' perceptions of customer service and safety.
- The three areas that business owners felt needed the most improvement were police service, places to eat, and the appearance of buildings. However, only 25 percent of the respondents thought that their own storefront needed improvement.
- Many of the businesses thought the City of Wilmington needed renewed energy and a more proactive approach toward marketing Brandywine Village's business district.

Business Inventory

This section presents the analysis of the mix of retail and service businesses in Brandywine Village. The analysis was used in the creation of a plan for business expansion and recruitment opportunities.

Examining the business mix of a downtown or business district provides a useful snapshot of the types and amounts of establishments located in the area. The data were collected on the types of businesses by visiting and walking the streets of the Brandywine Village business district. While doing so, the number and type of businesses (by U.S. Economic Census categories) was recorded. It is important to note that each business was placed into only one category. The category used was based on the primary type of goods or services provided by the business. For instance, a take-out restaurant may sell some grocery items, but should be categorized as a restaurant if that is its primary line of business.

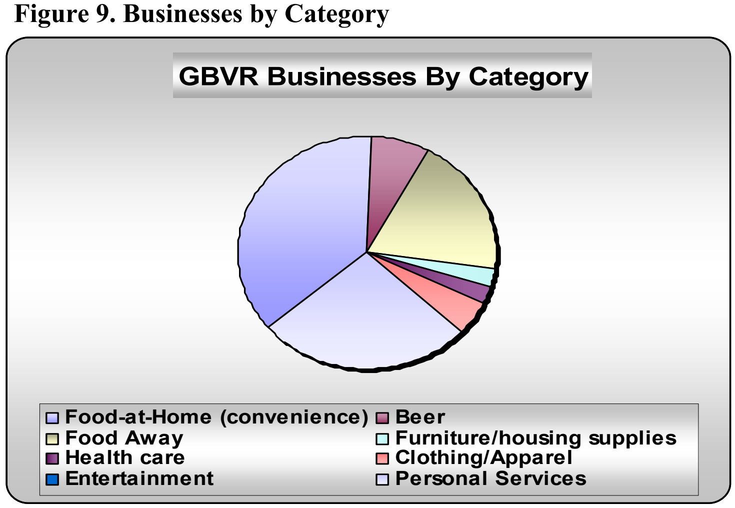
Data were collected for all retail and service businesses that exist within the district's limits along North Market Street, Concord Avenue, and Vandever Avenue. Businesses were divided into eight categories: Food at Home, Food Away from Home, Furniture/Housing Supplies, Health Care, Apparel, Beer and Liquor, Entertainment, and Personal Services. For Brandywine Village, the district is split into two portions, referred to as the upper and lower districts. The lower district contains mostly a mix of nonprofits and professional services, while the upper district is composed of businesses that cater mostly to the "Urban Row" consumer segment.

Only those businesses with a visible street-front or signage were included. Certain businesses, including home-based businesses, may not be included in the tallies. A total of 41 businesses were tallied in Brandywine Village. Detailed data describing the mix of businesses are presented in the tables on the next two pages. A companion CD provided to GBVR contains a GIS interactive map that shows business and building information linked to their respective tax parcels.

Table 14. Number of Businesses

Category	No. of Businesses
Food at Home	15
Personal services	11
Food Away	8
Beer/Liquor	3
Clothing/Apparel	2
Furniture/Housing Supplies	1
Health Care	1
Entertainment	0

Figure 9. Businesses by Category



Retail Analysis

The section provides detailed information on consumer demand for specific retail business categories. The purpose is to identify potential market opportunities for business expansion or recruitment. Note that the figures presented below for household expenditure potentials are based on 1999 household incomes in the trade area, as reported by the 2000 U.S. Census. They could therefore reasonably be adjusted upward by about 26 percent to account for the effects of inflation to mid-2006. Estimates of actual retail sales are based on the 2002 Economic Census and can be adjusted upward by approximately 17 percent. The combined effect of these adjustments would increase the nominal sales gap by nearly 31 percent from the figures presented in the tables below.[5]

The retail categories selected for analysis in this section were based on local research findings, professional knowledge of IPA staff, and preliminary conclusions drawn from local demographic and lifestyle data. Market conditions are assessed quantitatively using a comparison of actual and potential retail dollars as the measure. Market conditions are also assessed spatially to measure the proximity of existing demand within the trade area. Finally, other more qualitative considerations are discussed that help describe market potential for a specific store category.

In this section, supply and demand are measured by store type so that the results are more useful in business expansion and recruitment efforts. Specific store categories are used to add precision to the analysis. Standardized categories, i.e., those defined by the U.S. Economic Census, are used. Supply refers to the actual square footage of retail space, sometimes called gross leasable area (GLA), that exists in the trade area. Demand refers to the amount of retail space that could be supported by consumers residing in the trade area based on estimates of their spending potential. A comparison of supply and demand by store type can help identify gaps where demand clearly exceeds supply. After considering other market factors, including how and where local residents shop, conclusions should be drawn regarding potential business categories worthy of further market research. However, the analyses performed here are not substitutes for a complete feasibility study.

Food at Home

This category comprises establishments generally known as supermarkets and grocery stores, primarily engaged in retailing a general line of food, such as canned and frozen foods, fresh fruits and vegetables, and fresh and prepared meats, fish, and poultry. Included in this industry are delicatessen-type establishments primarily engaged in retailing a general line of food. A grocery store may be able to fill the role of an anchor store, which Brandywine Village currently lacks. In

[5] These inflation adjustments are based on the Conusmer Price Index (CPI) for all urban consumers in the Philadelphia-Camden-Wilmington Metropolitan Statistical Area, as reported by the Bureau of Labor Statistics via http://www.bls.gov, retrieved September 18, 2006. Reported figures for the index were 171.9 for the year 1999, 184.9 for the year 2002, and 216.4 for August 2006. These figures are not seasonally adjusted, and the base for the current index series is 1982-1984 = 100. The effect of the inflation adjustments on the sales *surplus* in the personal services category is to reduce it from the $1.90 million reported in Table 20 below to $1.89 million.

particular, the rise of urban markets is a current trend in inner-city commercial districts that appears to be a good match with the neighborhood's immediate needs. Also, urban markets that offer personal shopper services will be appealing to the elderly residents of Brandywine Village and could easily capture sales from downtown Wilmington workers and residents.

Table 15. Food-at-Home Sales Gap

	Actual Sales	Potential Sales	Gap
Food at Home	$16,710,323	23,012,744	$6,302,421

Food Away from Home

Businesses in the Food Services and Drinking Places subsector prepare meals, snacks, and beverages to customer order for immediate, on- and off-premises consumption. There is a wide range of establishments in these industries. Some provide food and drink only, while others provide various combinations of seating space, waiter/waitress services, and incidental amenities, such as limited entertainment. The industries in the subsector are grouped based on the type and level of services provided. The industry groups are full-service restaurants, limited-service eating places, special food services (such as food service contractors, caterers, and mobile food services), and drinking places. Residents in Brandywine spend very little of their disposable income at restaurants in the Village.

They most likely spend these dollars at the restaurants on U.S. Rt. 202, downtown, or the waterfront. The introduction of a fast-food restaurant signals that a neighborhood is "good." If it were not, the chain store would most likely not be there. A fast-food chain could aid in changing perceptions while also being a neighborhood anchor and providing local employment. Other limited-service restaurants could work very well in Brandywine Village and could easily draw lunch sales from local workers at the Job Corps, Social Services, nonprofits, and other businesses.

Table 16. Food-Away-from-Home Sales Gap

	Actual Sales	Potential Sales	Gap
Food Away	$3,000,125	$16,463,154	$13,463,029

Housing Supplies and Furniture

Businesses in the Furniture and Home Furnishings Stores subsector retail new furniture and home furnishings from fixed point-of-sale locations. The big-box establishments in this subsector usually operate from showrooms and have substantial areas for the presentation of their products. Floor covering establishments are primarily engaged in retailing new floor coverings, such as rugs and carpets, vinyl floor coverings, and floor tile (except ceramic or wood only), or retailing new floor coverings in combination with installation and repair services. Window treatment stores are primarily engaged in retailing new window treatments, such as curtains, drapes, blinds, and shades. Many offer interior decorating services in addition to the sale of products.

Brandywine Village fails to capture most of these sales due to outside competition from the big-box retailers on U.S. Rt. 202. A niche market in the category such as a used furniture store, specialty houseware, or glassware could possibly survive given the characteristics of local consumers. However, a local outlet for conventional housing goods would most likely fail due to the heavy comparison shopping available on U.S. Rt. 202 and the lack of disposable income for these goods from the “Urban Row” consumer segment.

Table 17. Housing Supplies Sales Gap

	Actual Sales	Potential Sales	Gap
Housing Supplies	$1,662,611	15,793,024	$14,130,413

Health and Personal Care

Businesses in the Health and Personal Care subsector are characterized principally by the products they retail. Often they have specialized staff trained in dealing with the products. Staff may include pharmacists, opticians, and other professionals engaged in retailing, advising customers, and/or fitting the product sold to the customer’s needs. Cosmetic, perfume, and beauty-supply shops are primarily engaged in retailing cosmetics, perfumes, toiletries, and personal grooming products. Optical goods stores are primarily engaged in one or more of the following: (1) retailing and fitting prescription eyeglasses and contact lenses, (2) retailing prescription eyeglasses in combination with the grinding of lenses to order on the premises, and (3) selling nonprescription eyeglasses. Food-supplement stores are primarily engaged in retailing food-supplement products, such as vitamins, nutrition supplements, and body enhancing supplements.

This market is sure to grow with the impending elderly housing development and as the current population ages. The district may be able to support another pharmacy considering that the Market Street Pharmacy is currently the only one in the area. An optical goods store that emphasizes value would also have a market in Brandywine.

Table 18. Health and Personal Care Sales Gap

	Actual Sales	Potential Sales	Gap
Health Care	$3,096,167	17,578,633	$14,482,466

Clothing and Clothing Accessories

Businesses in the Clothing and Clothing Accessories Stores subsector retail new clothing and clothing-accessories merchandise, shoes, and jewelry from fixed point-of-sale locations. Establishments in this subsector have similar display equipment and staff that is knowledgeable regarding fashion trends and the proper match of styles, colors, and combinations of clothing and accessories to the characteristics and tastes of the customer.

Currently, the largest clothing retailer sells apparel that caters to the "Urban Row" consumer segment. There is sufficient demand to expand this segment, especially in the family clothing sub-category that offers a general line of new clothing without specializing in sales for an individual gender or age group. Clothing is a good for which most consumers are willing to travel. Therefore, the clothing sales in the other consumer segments may be more difficult to capture. Shoes have a sales potential of just over $2 million, while actual sales are most likely much lower, considering the limited channels to purchase these goods.

Table 19. Clothing and Clothing Accessories Gap

	Actual Sales	Potential Sales	Gap
Clothing and Clothing Accessories	$1,351,433	12,044,378	$10,692,945

Personal Services

Businesses in the Personal Services subsector group are establishments that provide personal and laundry services to individuals, households, and businesses. Services performed include personal-care services, death-care services, laundry and dry-cleaning services, and a wide range of other personal services. Pet-care (except veterinary) services, photofinishing services, tax-preparation services, temporary parking services, and dating services are typical examples.

The Personal Services subsector is by no means all-inclusive of the services that could be termed personal services (i.e., those provided to individuals rather than businesses). There are many other subsectors, as well as sectors, that provide services to persons. Establishments providing legal, accounting, tax-preparation, architectural, portrait photography, and similar professional services are classified in Professional Services. Those providing health and social services are classified in Health Care and Social Assistance. Those providing educational instruction are classified in, Educational Services.

Currently, there seems to be a sales surplus, which suggests that consumers from outside the trade area patronize these stores. The local tax-preparation providers are most likely the main reason for the surplus, since they are the only business in this category that is capable of drawing sales from outside of this district.

Table 20. Personal Services Sales Gap

	Actual Sales	Potential Sales	Gap
Personal Services	$5,774,667	3,869,975	-$1,904,693

Clusters

Clusters are groups of companies and related organizations that collaborate to grow their businesses. There are no clusters of any particular retail category on which GBVR can build. However, there are many nonprofit organizations as well as the State Social Service office that are located in the district. Brandywine Village offers these nonprofits affordable office space that is conveniently located close to their client base. Types of social assistance organizations that could be supported in Brandywine Village are illustrated in Table 21 below.

Table 21. Prospective Social Assistance Organizations

Social Assistance
Alcoholism counseling (except medical treatment), nonresidential
Community action service agencies
Crisis intervention centers
Drug addiction self-help organizations
Exoffender rehabilitation agencies
Family social service agencies
Mediation, social service, family, agencies
Offender self-help organizations
Parenting support services
Educational support

The location of Brandywine Village could also be attractive to companies that support businesses in downtown Wilmington. Examples of complementary subsectors are shown in table 22.

Table 22. Complementary Businesses

Business Support Services	Computer Systems Design Services
Document Preparation Services	Computer Facilities Management Services
Employment Services	Graphic Design Services
Employment Placement Agencies	**Management Consulting Services**
Temporary Help Services	Administrative Management and General Management Consulting Services
Services to Buildings and Dwellings	
Exterminating and Pest Control Services	Human Resources and Executive Search Consulting Services
Janitorial Services	
Landscaping Services	Marketing Consulting Services
Carpet and Upholstery Cleaning Services	Process, Physical Distribution, and Logistics Consulting Services
Legal Services	**Advertising**
Offices of Notaries	Advertising and Related Services
Title Abstract and Settlement Offices	Advertising Agencies
Accounting	Public Relations Agencies
Tax Preparation Services	Media Buying Agencies
Payroll Services	Media Representatives
Computer Systems Design	Display Advertising
Custom Computer Programming Services	Advertising Material Distribution Services

Available building space, especially in the lower district, should be marketed as professional office space if a retailer cannot be placed there. The increase in local workers will thereby add to the demand of local goods and services described above.

Figure 10. Sales Gaps

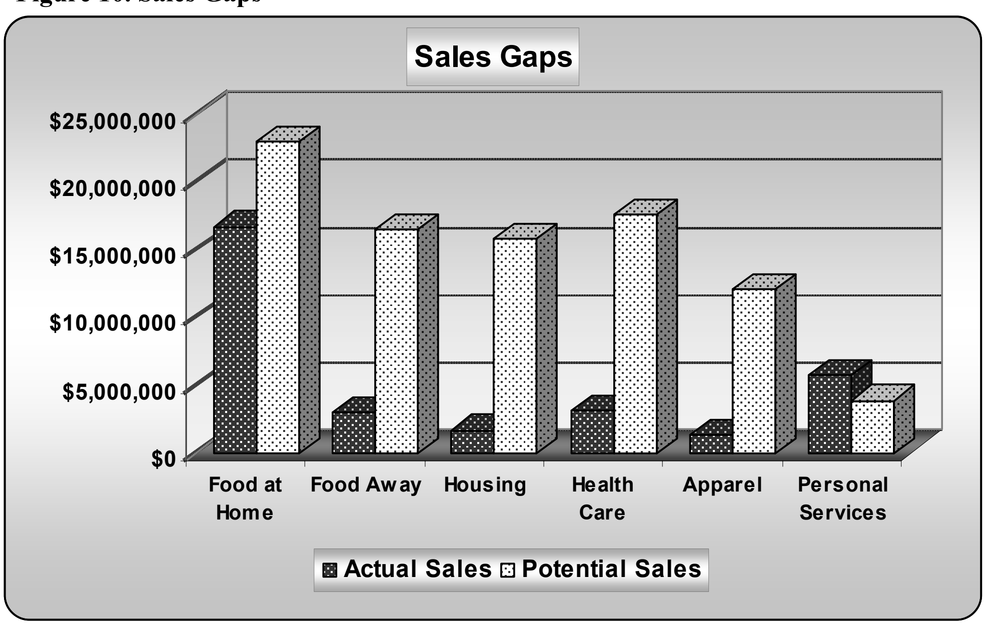


Table 23. Sales Potential by Retail Sub-Categories

HHLD Income	<$10K	$10-15K	$15-20K	$20-25K	$25-30K	$30-35K	$35-40K	$40-45K
Food at Home	**$2,152,206**	**$1,261,000**	**$815,591**	**$1,402,296**	**$1,368,024**	**$1,569,720**	**$1,252,728**	**$1,355,046**
Cereals and bakery products	$322,886	$189,800	$119,756	$197,873	$193,037	$213,725	$170,565	$196,092
Meats, poultry, fish, and eggs	$538,327	$329,160	$207,928	$392,800	$383,200	$403,760	$322,224	$343,999
Dairy products	$219,849	$131,040	$89,488	$148,282	$144,658	$165,315	$131,931	$153,773
Fruits and vegetables	$372,476	$222,560	$147,392	$244,518	$238,542	$283,250	$226,050	$219,556
Other food at home	$697,566	$387,920	$250,698	$418,332	$408,108	$503,670	$401,958	$441,207
Food Away from Home	**$1,260,688**	**$518,440**	**$408,618**	**$728,153**	**$710,357**	**$1,001,675**	**$799,395**	**$943,588**
Housing	**$878,845**	**$471,120**	**$338,212**	**$679,544**	**$662,936**	**$842,540**	**$672,396**	**$834,648**
Housekeeping supplies	$285,404	$180,960	$134,890	$209,166	$204,054	$254,410	$203,034	$227,098
Household furnishings and equip	$593,441	$290,160	$203,322	$470,378	$458,882	$588,130	$469,362	$607,550
Apparel	**$1,005,575**	**$518,440**	**$351,701**	**$545,992**	**$532,648**	**$774,045**	**$617,733**	**$634,785**
Men and Boys	$238,373	$77,880	$66,129	$100,164	$97,716	$186,945	$149,193	$143,298
Women and Girls	$353,192	$233,071	$136,864	$218,495	$213,155	$307,970	$245,778	$252,238
Children under 2	$39,123	$26,149	$22,372	$32,406	$31,614	$43,775	$34,935	$35,615
Footwear	$265,032	$122,788	$86,856	$120,295	$117,355	$138,020	$110,148	$110,197
Other Apparel	$109,651	$57,983	$39,809	$74,632	$72,808	$96,820	$77,268	$93,437
Automotive Fuel & Repairs	**$1,542,800**	**$834,080**	**$741,895**	**$1,344,849**	**$1,311,981**	**$1,778,810**	**$1,419,594**	**$1,667,620**
gas and motor oil	$650,180	$339,040	$298,074	$517,023	$504,387	$674,135	$537,999	$625,986
maintenance and repairs	$892,620	$495,040	$443,821	$827,826	$807,594	$1,104,675	$881,595	$1,041,634
Health Care	**$1,244,709**	**$953,680**	**$662,935**	**$1,122,426**	**$1,094,994**	**$1,266,900**	**$1,011,060**	**$1,101,551**
Drugs	$331,152	$237,120	$178,647	$262,685	$256,265	$252,350	$201,390	$216,204
Medical Supplies	$55,653	$33,280	$26,649	$54,501	$53,169	$56,650	$45,210	$41,481
Entertainment	**$773,053**	**$372,320**	**$311,234**	**$744,847**	**$726,643**	**$897,130**	**$715,962**	**$806,575**
Television & radios, sound equip	$389,558	$206,440	$153,972	$282,325	$275,425	$332,175	$265,095	$326,820
Pets, toys, playground	$128,384	$81,120	$71,064	$216,531	$211,239	$153,985	$122,889	$183,522
Other supplies, equip., services	$87,611	$30,160	$40,796	$134,043	$130,767	$260,590	$207,966	$135,756
Personal Care products/services	**$289,826**	**$174,200**	**$119,098**	**$188,544**	**$183,936**	**$232,780**	**$185,772**	**$223,327**

Table 23. Sales Potential by Retail Sub-Categories (continued)

$45-50K	$50-60K	$60-75K	$75-100K	$100-125K	$125-150K	$150-200K	$200K+	TOTAL
$1,390,620	**$2,582,600**	**$2,460,497**	**$2,597,408**	**$1,545,136**	**$606,882**	**$316,449**	**$336,541**	**$23,012,744**
$201,240	$356,678	$376,987	$396,896	$217,554	$76,137	$42,210	$44,890	$3,316,326
$353,030	$705,678	$670,267	$607,276	$374,078	$155,472	$80,262	$85,358	$5,952,819
$157,810	$268,032	$284,115	$286,996	$156,883	$65,190	$33,264	$35,376	$2,472,002
$225,320	$408,330	$477,497	$442,112	$266,019	$112,668	$54,243	$57,687	$3,998,220
$452,790	$843,882	$887,172	$889,876	$530,602	$197,415	$106,470	$113,230	$7,530,896
$968,360	**$1,962,078**	**$1,834,833**	**$2,325,484**	**$1,583,190**	**$584,865**	**$403,893**	**$429,537**	**$16,463,154**
$856,560	**$1,718,476**	**$1,614,873**	**$3,261,832**	**$1,525,391**	**$565,431**	**$421,722**	**$448,498**	**$15,793,024**
$233,060	$438,344	$426,784	$732,381	$384,848	$133,209	$87,570	$93,130	$4,228,342
$623,500	$1,280,132	$1,188,090	$2,529,451	$1,140,543	$431,853	$334,152	$355,368	$11,564,313
$651,450	**$1,372,966**	**$1,379,638**	**$1,598,888**	**$967,505**	**$432,222**	**$320,229**	**$340,561**	**$12,044,378**
$147,060	$317,590	$318,165	$416,996	$203,197	$91,547	$71,505	$76,045	$2,701,802
$258,860	$538,158	$564,844	$607,278	$406,032	$164,419	$132,552	$140,968	$4,773,874
$36,550	$58,632	$63,172	$81,015	$44,875	$24,292	$9,765	$10,385	$594,675
$113,090	$276,408	$262,836	$249,943	$152,213	$66,035	$28,665	$30,485	$2,250,366
$95,890	$181,479	$170,254	$243,663	$161,188	$85,933	$77,742	$82,678	$1,721,235
$1,711,400	**$3,361,568**	**$3,118,544**	**$3,692,640**	**$2,245,186**	**$837,261**	**$457,569**	**$486,621**	**$26,552,418**
$642,420	$1,194,976	$869,453	$1,279,864	$740,617	$269,985	$134,379	$142,911	$9,421,429
$1,068,980	$2,166,592	$2,026,993	$2,412,776	$1,504,569	$567,276	$323,190	$343,710	$16,908,891
$1,130,470	**$1,962,078**	**$1,683,611**	**$2,094,380**	**$1,243,935**	**$427,794**	**$280,161**	**$297,949**	**$17,578,633**
$221,880	$354,585	$298,639	$348,540	$223,296	$83,393	$40,068	$42,612	$3,548,826
$42,570	$87,249	$77,271	$107,385	$72,879	$23,617	$14,238	$15,142	$806,943
$827,750	**$1,649,374**	**$1,712,633**	**$2,265,196**	**$1,367,790**	**$538,986**	**$450,261**	**$478,849**	**$14,638,603**
$335,400	$603,072	$595,202	$680,754	$418,235	$158,055	$106,407	$113,163	$5,242,098
$188,340	$327,363	$323,189	$409,457	$255,252	$90,527	$59,798	$63,595	$2,886,255
$139,320	$332,946	$399,376	$641,185	$290,428	$129,396	$85,474	$90,901	$3,136,714
$229,190	**$444,626**	**$415,175**	**$546,988**	**$313,766**	**$140,097**	**$88,515**	**$94,135**	**$3,869,975**

Table 24. Sales Potential and Supportable Square Footage by Category

Hhld inc	Food at Home	Food Away	Housing	Apparel	Automotive	Health Care	Entertainment	Personal Services
<$10,000	$2,152,206	$1,260,688	$878,845	$1,005,575	$1,542,800	$1,244,709	$773,053	$289,826
$10,000-$14,999	$1,261,000	$518,440	$471,120	$518,440	$834,080	$953,680	$372,320	$174,200
$15,000-$19,999	$815,591	$408,618	$338,212	$351,701	$741,895	$662,935	$311,234	$119,098
$20,000-$24,999	$1,402,296	$728,153	$679,544	$545,992	$1,344,849	$1,122,426	$744,847	$188,544
$25,000-$29,999	$1,368,024	$710,357	$662,936	$532,648	$1,311,981	$1,094,994	$726,643	$183,936
$30,000-$34,999	$1,569,720	$1,001,675	$842,540	$774,045	$1,778,810	$1,266,900	$897,130	$232,780
$35,000-$39,999	$1,252,728	$799,395	$672,396	$617,733	$1,419,594	$1,011,060	$715,962	$185,772
$40,000-$44,999	$1,355,046	$943,588	$834,648	$634,785	$1,667,620	$1,101,551	$806,575	$223,327
$45,000-$49,999	$1,390,620	$968,360	$856,560	$651,450	$1,711,400	$1,130,470	$827,750	$229,190
$50,000-$59,999	$2,582,600	$1,962,078	$1,718,476	$1,372,966	$3,361,568	$1,962,078	$1,649,374	$444,626
$60,000-$74,999	$2,460,497	$1,834,833	$1,614,873	$1,379,638	$3,118,544	$1,683,611	$1,712,633	$415,175
$75,000-$99,999	$2,597,408	$2,325,484	$3,261,832	$1,598,888	$3,692,640	$2,094,380	$2,265,196	$546,988
$100,000-$124,999	$1,545,136	$1,583,190	$1,525,391	$967,505	$2,245,186	$1,243,935	$1,367,790	$313,766
$125,000-$149,999	$606,882	$584,865	$565,431	$432,222	$837,261	$427,794	$538,986	$140,097
$150,000-$199,999	$316,449	$403,893	$421,722	$320,229	$457,569	$280,161	$450,261	$88,515
$200,000+	$336,541	$429,537	$448,498	$340,561	$486,621	$297,949	$478,849	$94,135
TOTAL	**$23,012,744**	**$16,463,154**	**$15,793,024**	**$12,044,378**	**$26,552,418**	**$17,578,633**	**$14,638,603**	**$3,869,975**
Supportable Sq. Ft	**70,103**	**63,937**	**68,967**	**32,352**	**58,338**	**46,162**	**190,038**	**17,375**

Conclusions and Recommendations

Economic Development Committee Plan of Action

The Economic Development (ED) Committee can act as the facilitator for business recruitment. In order for GBVR to effectively produce change, the ED Committee must be actively involved with the revitalization process. Listed below are tasks that GBVR's ED Committee can complete by using this market analysis and other community assets.

TASK #1: Create a business-retention strategy.

- Determine which current businesses are vital to Brandywine Village and to its vision and goals (not just those in trouble).
- Determine which businesses will work with the Committee.
- Determine which businesses the Committee will assist.
- Determine how the Committee will assist these businesses with assistance from the local office of the U.S. Small Business Administration (SBA), and the Delaware Small Business Development Center (SBDC):
    - Monthly workshops
    - One-on-one business mentoring program
    - Expanding product line
    - Cooperative marketing

TASK #2: Determine to what extent to build upon the existing businesses or recruit new businesses to fill the sales gaps.

TASK #3: Review the list of targeted retail categories from the market analysis.

TASK #4: Identify the information prospective business owners need to help them make decisions about moving to Brandywine Village.

- Identify the information in this market analysis that franchises want to know about Brandywine Village.
- Determine whether or not GBVR wants, or has the proper location for, a franchise in Brandywine Village by using the business inventory, and if so, determine how to pursue said franchise.

TASK #5: Create a business-recruitment packet that should include

- An easy-to-grasp digest of key Brandywine Village market demographics
- A digest of sales information, highlighting targeted-market opportunities
- Concise, enticing description of Brandywine Village (marketing position statement)
- Profiles of available spaces (may include copy of Business Inventory CD)
- List of current incentives and financing sources

TASK #6: Meet with property owners to present the market analysis, business-recruitment plan, and discuss possible incentives. Provide them with an opportunity to participate.

TASK #7: Implement actual recruitment of businesses.

- Identify businesses in the region fitting the targeted retail categories. These should include a mix of national chains, regional enterprises, and small businesses ready to expand. Resources for identifying potential candidates include the websites *www.franchise.org* and *www.minorityfranchising.com.*
- Create and maintain a list of businesses to visit.
- Recruit, train, assign, and send out volunteer scouts.
- Review and prioritize profiled businesses on an ongoing basis.
- Match available, appropriately sized locations with particular business. Keep in mind the distinction made between the Upper and Lower District. It may be difficult to recruit some retailers or professional service providers to the Upper District.
- Send letters of introduction/interest to prospect and follow up with phone call.
- Invite prospect to visit Brandywine Village for a tour, lunch, and meeting with a team of notable neighborhood leaders and professionals from the ED Committee.
- Follow up with information that will meet the particular retailer's needs.

Clean-up

To make Brandywine Village more attractive, creating and maintaining cleanliness is an essential step. This is the first impression of your downtown that visitors who are passing through will get. To look good, public and private spaces must be clear of debris. Regular maintenance is a must. Possible actions in a local clean-up program include

- Identify problem areas.
- Define a public space-maintenance plan.
- Honor merchants who clean up their own spaces.
- Research government façade-rebate programs.
- Declare a community pride day with organized clean-up efforts completed by volunteers.
- Install garbage cans and recycling bins in strategic locations throughout downtown; volunteer groups can be rewarded by reaping the benefits of recycled goods.
- Offer incentives such as scholarships and trophies to individuals who display leadership and commitment to the effort.
- Design an "adoption" plan for maintaining the cleanliness of public areas. Target groups may include scout troops, community clubs, entire schools or individual grades, religious organizations, businesses, and so forth.

Store Windows and Building Facades

There are many tactics for making buildings look lively, whether occupied or vacant. Several are low cost but require the cooperation of the property owner.

- Decorate and light the windows of vacant buildings while they are waiting to attract new tenants. Display a visual that illustrates local attractions or documents the ongoing rejuvenation process.
- Have volunteer organizations adopt windows and stores for holiday decorating. Encourage local retailers to donate materials for display.
- Showcase the neighborhood art scene in otherwise vacant windows; this can be the work of professionals, amateurs, or beginners of any age.
- Encourage physical improvements such as planters, flower boxes, benches, and awnings. Seek donations from local nurseries, gardeners, carpenters, banks, etc. Reward contributors with a plaque (placed on a bench, sidewalk, or planter) or even a reciprocal favor.

Beautification and Pedestrian Safety

Spaces between buildings, along streets, and specific design features can be improved to make your neighborhood visually dramatic, convenient, and safe. Once again, the cooperation of a variety of community members through the donation of goods or volunteer activities may be essential to the success of any number of these projects. Keep in mind that many of these suggestions can be costly.

- Plant trees to enhance beauty and shelter pedestrians; consider both low cost and low maintenance.
- Install and use exterior lighting. Antique lampposts, trees decorated with white lights, or a lighted water fountain can create a beautifully dramatic, yet safe, atmosphere.
- Raise crosswalks as speed bumps for safety and to keep walking areas dry; paint lines bright colors to increase the safety of both pedestrians and motorists.
- Plan greater density to minimize travel.
- Offer seating by providing benches and picnic tables where appropriate.

Crime and Public Safety

Until people feel safe, consumers will be reluctant to shop in the district, entrepreneurs will be unwilling to open new businesses, and property owners will defer investment for fear that property values will decline. According to the 2005 Evaluation of Operation Weed and Seed in Wilmington, Del., the two neighborhoods that comprise Brandywine Village account for about 21 percent of the city's drug crime complaints and about 23 percent of its violent crime complaints from 1995 to 2003. Among the eleven features rated in the customer-intercept survey, "safety & security" rated as the second lowest and was also cited as one of the worst characteristics of Brandywine Village. Clearly, the perception of a high crime rate is supported by an accurate reality. That is why reducing crime and the perception of crime is a precondition for revitalizing this urban commercial district. Since the four-point Main Street model does not explicitly address public safety, urban practitioners must add crime and public safety initiatives to their agenda. There are four approaches that urban Main Street programs commonly use to prevent crime and improve public safety.

- Building relationships and communication between the business community and the police department. To build good communication and working relationships with local police, GBVR should
    - Hold regular joint meetings with the local police officers to discuss crime issues and how to address them.

  - Introduce businesses and police officers to one another and encourage business owners and employees to report crime matters to the police.
  - Establish direct communication between the district's business community and police officers through cell phones, beepers, and other means.
- Educating businesses and other concerned parties about public safety issues and crime-prevention techniques. GBVR should include the following activities in their public safety education work:
  - Learning about police operations, available resources, and effective responses to crime. Disseminate this information to the commercial district.
  - Training property owners, tenants, employees, and residents to prevent crime.
  - Monitoring and promoting recognition of changes in crime activity and safety perceptions.
- Applying crime-prevention design principles to building and public-space improvements. Crime Prevention Through Environmental Design (CPTED) offers ways of reducing the opportunities for neighborhood crime. CPTED assesses physical conditions and design features that may contribute to crime, such as vacant lots that house criminal activities, poor lighting, poorly maintained or supervised spaces, and poor visibility into buildings. CPTED principles include improving visibility so there is less opportunity to conduct crime outside of public view and eliminating or improving the control and management of spaces that can become magnets for criminal activity. Resources for detailed information include *Crime Prevention Through Environmental Design* (2nd edition, Butterworth-Heinman, Boston) by Tim Crowe, www.cpted-watch.com, and work by W.H. Whyte in New York and other cities. A few CPTED methods that GBVR could implement are to
  - Complete a CPTED assessment and use it to set a public safety, design, and economic-restructuring agenda.
  - Incorporate CPTED principles in design guidelines as well as in the education and technical assistance provided for building and façade improvements.
  - Use financial incentive programs to encourage property owners to carry out CPTED improvements, such as removing storefront grates that block visibility into stores.
  - Set priorities for real-estate development and public improvement projects that will create visual reassurance and provide "eyes on the street" to discourage criminal activity and encourage other activities, including residential development on and near Market Street and building designs that connect building occupants with the sidewalk (this includes avoiding suburban-type designs such as the Job Corps building with its large surface parking lot in front of the building).
  - Advocate for better city enforcement of code violations that contribute to crime.
- Other approaches include installing intercom or radio systems, which allow merchants to communicate with each other and/or the police to report problems in or near their establishments, and the more expensive options of establishing supplemental security services or a closed-circuit television system. In commercial districts without beat officers or other forms of community policing, these services provide a visible presence on the street that helps prevent crime and improve public safety perceptions. Many business-improvement districts (BIDs) hire their own staff to walk the streets, defuse potential problems, and alert police to criminal activity. An alternative approach employed by some BIDs is to use police officers, either by hiring off-duty police or by securing funds for police department beat patrols.

Appendices

Appendix A. Maps

Map 1. Customer Origin by Home Zip Code

Map 2. Customer Origin by Work Zip Code

Appendix B. Sales Estimation

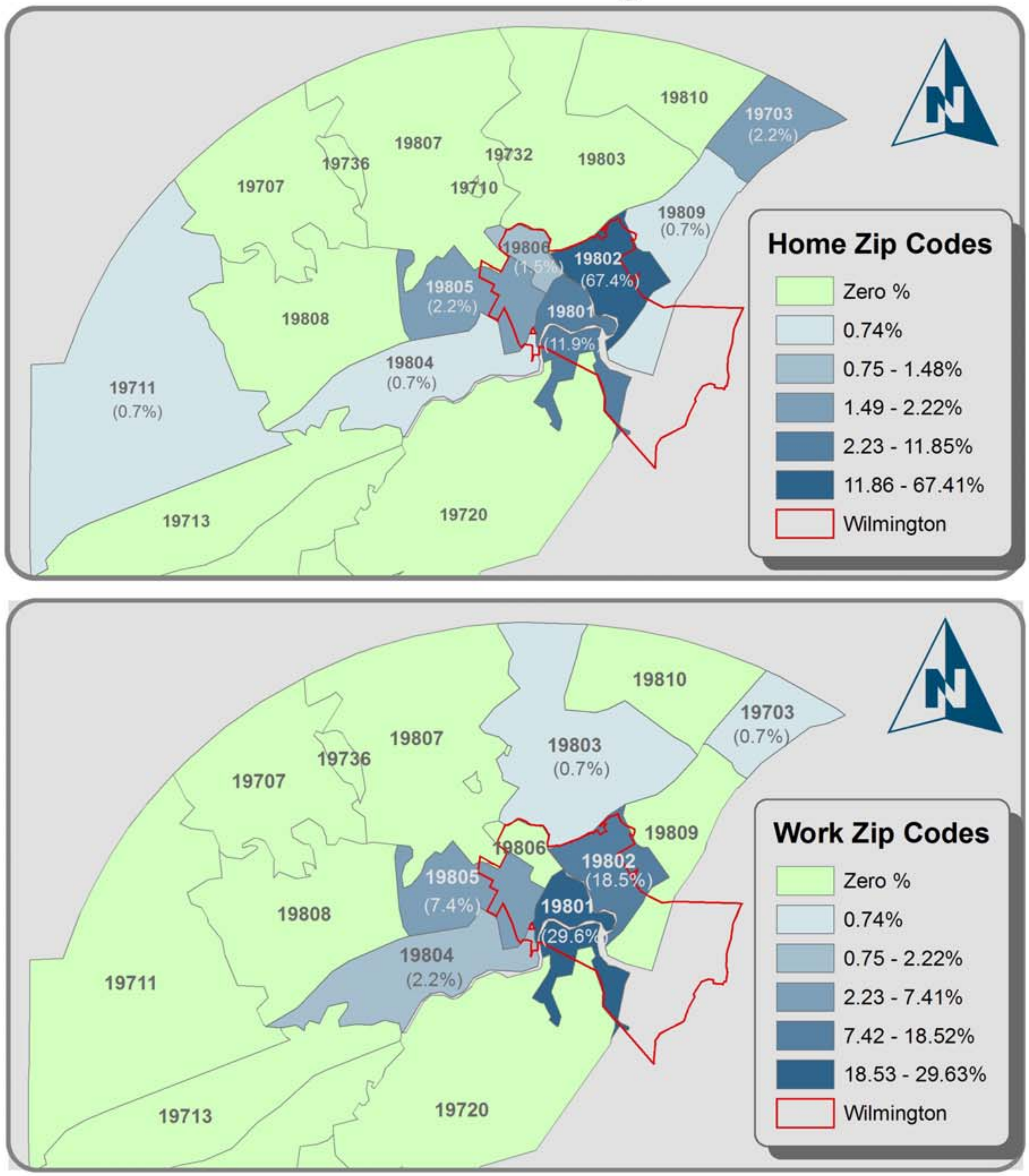
1. Actual Sales Estimation Process
2. Potential Sales Estimation Process

Appendix C. Surveys

1. Customer-Intercept Survey
2. Business Owner Survey

Appendix A. Maps

Customer Origins



Brandywine Village's primary trade area is contained in 19802

0 1.25 2.5 5 7.5 10

Miles

institute for Public Administration

Appendix B. Sales Estimation

Actual Sales Estimation

Since Delaware does not charge a retail sales tax, actual sales needs to be estimated. First, information from the Census of Retail Trade, published by the U.S. Bureau of the Census every five years, was acquired. There is not any information on actual sales in Brandywine Village, so the average sales per business was calculated, by business type, for Wilmington, then multiplied by the number of businesses, by business type, in the district.

Step 1: Total store sales in the city	÷	# stores in the city	=	Average sales/store
Step 2: Average sales/store	×	# stores in the district	=	Estimated sales for district stores

Potential Sales Estimation

Potential Sales for each retail category and subcategory were calculated using the following method. The typical sales per households by income category and retail category were found in the *Consumer Expenditure Survey*, a document produced by the
U.S. Bureau of Labor Statistics to track the way Americans spend money.

Income Category	No. of Households	×	Typical sales per income & retail category	=	Potential Sales
<$10,000					
$10,000-$14,999					
$15,000-$19,999					
$20,000-$24,999					
$25,000-$29,999					
$30,000-$34,999					
$35,000-$3,9999					
$40,000-$44,999					
$45,000-$49,999					
$50,000-$59,999					
$60,000-$74,999					
$75,000-$99,999					
$100,000-$124,999					
$125,000-$149,999					
$150,000-$199,999					
$200000+					

Appendix C. Surveys

March 6, 2006
Dear Resident:

Please take a moment to complete the following survey. Greater Brandywine Village Revitalization, Inc. and Habitat for Humanity are working to improve the services that you have access to in and around your neighborhood. We have contracted with the University of Delaware to develop an economic stimulation package and they need your response.

The results of the survey could mean a new grocery store and/or bank for northeast residents! However, we can't do anything until we hear from residents so please complete the form and mail it so that your voice can be heard!

If you have any questions about the survey please call Karen Marshall at 571-9050.

Thank you,

Karen Marshall, GBVR — Kevin Smith, Habitat for Humanity of New Castle County

Please tell us about your experiences in and around the Brandywine Village area.

1. **How often do you come to Brandywine Village (N. Market Street from 18th to 23rd Street) for the following?**

	3-4 times per week	1-2 times per week	2-3 times per month	Once a month	Less than once a month	Never
Grocery Shopping						
Shopping						
Personal Services						
Dining						
Running Errands						
Other (specify)						

2. **If you answered "Never" in Question 1, please specify why you do not shop in Brandywine Village for these goods and services.**

____

3. **If you answered "Never" in Question 1, please indicate where you shop for these goods & services.**

Shopping (not including groceries)	
Personal Services (laundry, hair styling, etc)	
Dining	
Other (specify)	

4. **Where do you do most of your shopping for grocery items?**

- ❑ Acme (Concord Pike)
- ❑ Acme (N. Du Pont St.)
- ❑ Superfresh (Marsh & Silverside)
- ❑ Super G (Concord Mall)
- ❑ Adams Four (Super G)
- ❑ Other (specify:____________________________)

5. **What are the most convenient times for you to shop for goods and services? (check all that apply)**

- ❑ Weekdays – morning
- ❑ Weekdays – afternoon
- ❑ Weekdays - night

❑ Weekends – morning ❑ Weekends – afternoon ❑ Weekends – night

6. **How do you travel to shop for goods and services?**

❑ Walk ❑ Drive ❑ Bus ❑ Other (specify: _________________)

7. **What influences your shopping the most? (Choose TWO).**

❑ Location ❑ Quality ❑ Store sales and discounts

❑ Parking ❑ Retail mix

8. **Please rate the Brandywine Village on each of the following factors:**

	Very Bad	Bad	OK	Good	Very Good
Parking availability	1	2	3	4	5
Variety of stores	1	2	3	4	5
Merchandise quality	1	2	3	4	5
Traffic congestion	1	2	3	4	5
Variety of places to eat	1	2	3	4	5
Store hours	1	2	3	4	5
Safety & security	1	2	3	4	5
Cleanliness	1	2	3	4	5
Lighting	1	2	3	4	5
Sidewalks	1	2	3	4	5
Appearance of stores & buildings	1	2	3	4	5

9. **What additional stores would encourage you to shop in Brandywine Village? (Choose THREE).**

❑ Grocery
❑ Houseware
❑ Hardware
❑ Electronics
❑ Gas Station
❑ Cards & Gifts
❑ Toys & Games
❑ Lawn & Garden
❑ Beauty & Bath
❑ Clothing & Shoes
❑ Auto Parts / Repair
❑ Books & Music
❑ Banking / Check Cashing
❑ Dry Cleaning
❑ Video Rental
❑ Hair, Beauty, Nail Salon

10. **What restaurants would encourage you to dine in Brandywine Village? (Choose THREE).**

❑ American
❑ Asian
❑ Bar & Grill
❑ Café/Diner
❑ Coffeehouse
❑ Deli/Sandwich
❑ Fast food
❑ Italian
❑ Mexican
❑ Pizza
❑ Seafood
❑ Steakhouse
❑ Other (specify:) ________________

11. **What do you like BEST/LEAST about Brandywine Village?**

Please tell us about yourself and your household:

Which age group do you belong to?

❑ 15 – 24
❑ 25 – 44
❑ 45 – 64
❑ 65 +

What is your gender?

❑ Female ❑ Male

Zip code at WORK _______

Are you retired?

❑ Yes ❑ No

What is your race/ethnicity?

- ❑ African-American
- ❑ Asian-American
- ❑ Latino
- ❑ White
- ❑ Other

How long have you lived in this area?

____ Years _____ Months

How many people live in your household?

____Children ____Adults

Which income range most closely describes your household's income?

- ❑ Less than $10,000
- ❑ $10,000 - $19,999
- ❑ $20,000 - $34,999
- ❑ $35,000 - $49,999
- ❑ $50,000 - $74,999
- ❑ $75,000 - $100,000
- ❑ $100,000 +

Brandywine Village Business Owner Survey

Date: ________________ Time:________________

Please tell us a little bit about your business.

1. Name of Business:_______________________________________.
2. Business Address:_______________________________________.
3. Your name and title:_______________________________________.
4. Business Phone: (____)_______________.
5. In regards to your current location, do you: ❒ rent your space ❒ own your space
6. What is the approximate square footage of your business?:________________.
7. How old is your business?:________________________.
8. How many years have you been at this location?:________________________.
9. How many full-time and part-time workers do you employ? Full-time:___ Part-time:___

Please tell us a little bit about your patrons.

10. Please respond to the following:

Hours of operation:	Busiest day of week:	Busiest time of day:	# of patrons per day:

11. Who are your customers? (Please check all that apply)

❒ Out-of-towners ❒ Retirees ❒ Rural Residents ❒ Other:_________________

12. Over the last five years, your business has:

❒ Decreased ❒ Stayed the same ❒ Increased

Why?:____

13. Do you have the same customers you had five years ago? ❒ Yes ❒ No

If no, why?:____

14. Is parking a problem for your customers? ❒ Yes ❒ No

15. Is parking a problem for your employees? ❒ Yes ❒ No

16. Please rank the following methods of advertising based on their effectiveness:

	Very Bad	Bad	OK	Good	Very Good
Newspaper ads	1	2	3	4	5
Radio ads	1	2	3	4	5
Group promotions	1	2	3	4	5
Window displays	1	2	3	4	5
Word of mouth	1	2	3	4	5
Yellow pages	1	2	3	4	5

(Continued on reverse side)

17. List three reasons why people shop in Brandywine businesses:

____

____

____

18. List three reasons why people don't shop in Brandywine businesses:

____

____

____

19. What kinds of new businesses would you like to see open in your area?

____

____

20. What kind of improvements would you like to see made to your area?

____

____

21. Would you make business improvements to your establishment if low-interest loans were available? ❒ Yes ❒ No

22. Would you be willing to coordinate efforts with other businesses to spruce up your area by improving your buildings interior, exterior signs, etc. ❒ Yes ❒ No

23. Are you willing to volunteer your time, services, and/or products to the revitalization of downtown? ❒ Yes ❒ No

24. If you were able, what changes, improvements, and expansions would you make to your business?

____

____

____

25. What factors do you feel limit your expansion?

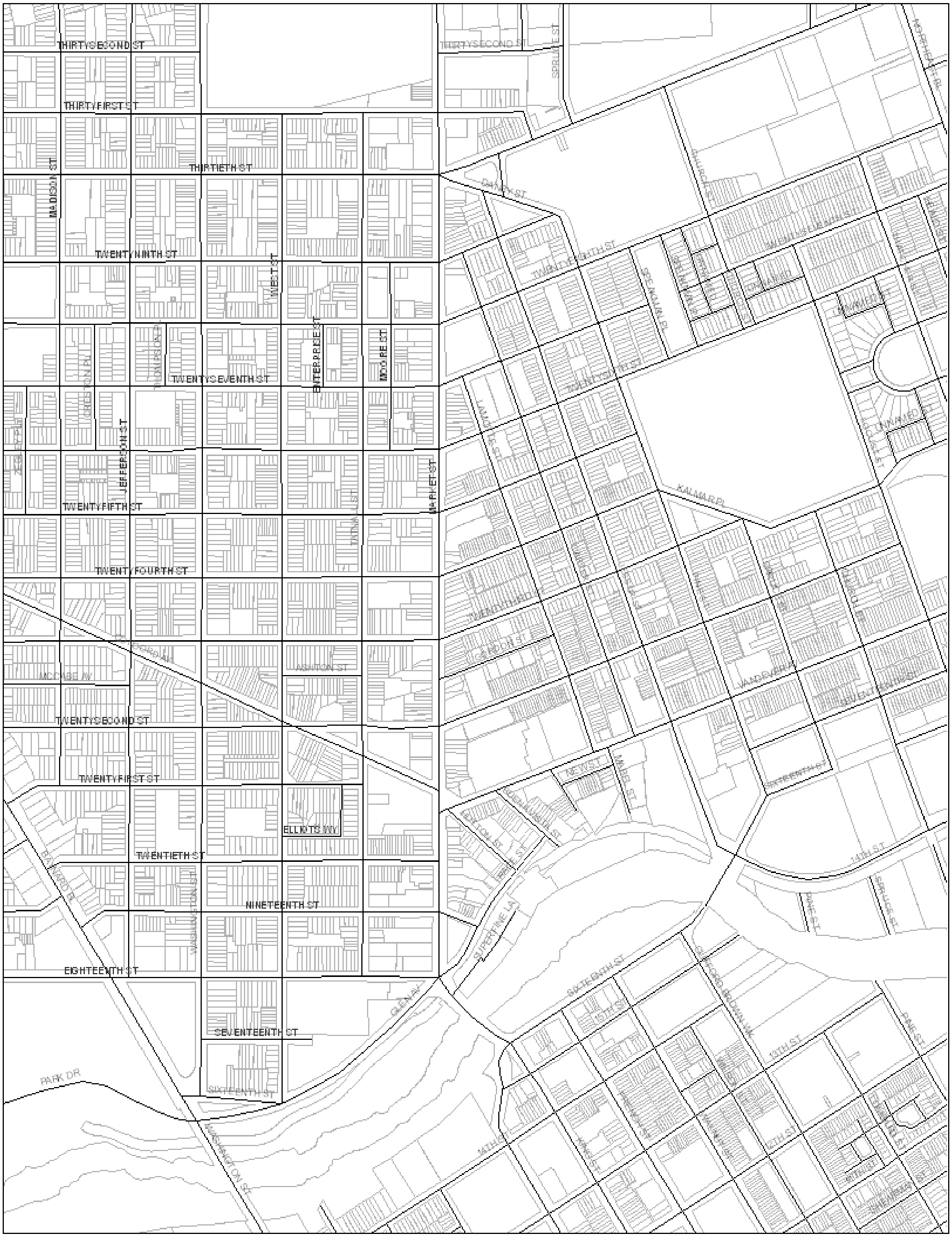
____

____

____

(Continued on next page)

Your participation in this survey is greatly appreciated. Thank you & have a great day!



Please Draw an area on the map that represents where most of your customers (about 75%) come frrom.
If the map is not applicable please explain on the back.

Brandywine Village Customer Intercept Survey

The University of Delaware is surveying local pedestrian traffic in Brandywine Village to give researchers a better idea of the frequency, purpose, and perceptions these consumers have of the area. It includes questions about transportation, purpose for visiting, frequency of service utilization, consumer ratings and assessments, preferences regarding future expansion and redevelopment, and some basic demographic information to identify target markets. You have been chosen at random from the customers in Brandywine Village. Overall, 280 + persons will be included in the survey. The survey will take approximately 4-6 minutes of your time.

Your answers will be kept confidential and your response will not be linked to you personally; they will be reported as a group. You can refuse to answer any question or to stop the interview at any time. If you complete the survey we will presume informed consent.

If you have any questions about the project you may contact Tony Doss at 302-831-6372. If you have any questions regarding your rights as a participant, you may contact the Chair, Human Subjects Review Board, University of Delaware at 302-831-2136.

Thank you for your participation!

Brandywine Village Customer Intercept Survey

This survey is confidential! You will not be asked to reveal your name or address.

Date: _________________ **Time:** _________________

Please tell us about your experiences in and around the Brandywine Village area.

1. **Today, how did you get to Brandywine Village?** ❑ walk ❑ drive ❑ bus ❑ other

2. **What is the purpose of your visit to Brandywine Village today?**

❑ Grocery shopping ❑ Shopping ❑ Professional Service
❑ Dining ❑ Running Errands ❑ Outdoor Recreation
❑ Other (specify) ________________________

3. **How often do you come downtown for the following? (Check all boxes that apply).**

	3-4 times per week	1-2 times per week	2-3 times per month	Once a month	<Once a month	Never
Grocery Shopping						
Shopping						
Professional Service						
Dining						
Running Errands						
Outdoor Recreation						
Other (specify)						

4. **What are the most convenient times for you to visit Brandywine Village?** (check all that apply)

❑ Weekdays – morning ❑ Weekdays – afternoon ❑ Weekdays - night
❑ Weekends – morning ❑ Weekends – afternoon ❑ Weekends – night

5. **Where do you do most of your shopping for grocery items?**

❑ Acme (Concord Pike) ❑ Super G (Concord Mall)
❑ Acme (N. Du Pont St.) ❑ Other Chain (specify:______________________________)
❑ Superfresh (Marsh & Silverside) ❑ Independent grocer (specify:_______________________)

6. **Please rate the Brandywine Village on each of the following factors (circle one):**

	Very Bad	Bad	OK	Good	Very Good
Parking availability	1	2	3	4	5
Variety of stores	1	2	3	4	5
Merchandise quality	1	2	3	4	5
Traffic congestion	1	2	3	4	5
Variety of places to eat	1	2	3	4	5
Store hours	1	2	3	4	5
Safety & security	1	2	3	4	5
Cleanliness	1	2	3	4	5
Lighting	1	2	3	4	5
Sidewalks	1	2	3	4	5
Appearance of stores & buildings	1	2	3	4	5

(Continued on reverse side)

7. What influences your shopping in Brandywine Village the most? (Choose one).

- ❑ Location
- ❑ Quality
- ❑ Retail mix
- ❑ Parking
- ❑ Special events
- ❑ Store sales and discounts

8. **What <u>additional</u> stores would you like to see in Brandywine Village? (Choose three).**

- ❑ Grocery
- ❑ Houseware
- ❑ Hardware
- ❑ Electronics
- ❑ Gas Station
- ❑ Cards & Gifts
- ❑ Toys & Games
- ❑ Lawn & Garden
- ❑ Beauty & Bath
- ❑ Clothing & Shoes
- ❑ Auto Parts / Repair
- ❑ Books & Music
- ❑ Banking / Check Cashing
- ❑ Dry Cleaning
- ❑ Video Rental
- ❑ Hair, Beauty, Nail Salon

9. What <u>additional</u> restaurants would you like to see in Brandywine Village? (Choose three).

- ❑ American
- ❑ Asian
- ❑ Bar & Grill
- ❑ Café/Diner
- ❑ Coffeehouse
- ❑ Deli/Sandwich
- ❑ Fast food
- ❑ Italian
- ❑ Mexican
- ❑ Pizza
- ❑ Seafood
- ❑ Steakhouse
- ❑ Other (specify:) ________________

10. **What do you like <u>BEST</u> about Brandywine Village?**

____

____

11. **What do you like <u>LEAST</u> about Brandywine Village?**

____

____

Please tell us about yourself and your family:

Which age group do you belong to?
- ❑ 15 – 19
- ❑ 20 – 24
- ❑ 25 – 34
- ❑ 35 – 44
- ❑ 45 – 54
- ❑ 55 – 64
- ❑ 65 +

What is your race/ethnicity?
- ❑ African-American
- ❑ Asian-American
- ❑ Latino
- ❑ White
- ❑ Other

If you live in the area, how long have you resided here?
_____ Years ______ Months

How many people live in your household?
_____Children _____Adults

Zip code at WORK ________

Zip code at HOME ________

Which income range most closely describes your household's income?
- ❑ Less than $10,000
- ❑ $10,000 - $19,999
- ❑ $20,000 - $34,999
- ❑ $35,000 - $49,999
- ❑ $50,000 - $74,999
- ❑ $75,000 - $100,000
- ❑ $100,000 +

What is your gender?
❑ Female ❑ Male

Are you retired?
❑ Yes ❑ No

Your participation in this survey is greatly appreciated. Thank you & have a great day!

Institute for Public Administration
College of Human Services, Education & Public Policy
University of Delaware
180 Graham Hall
Newark, DE 19716-7380

phone: ***302-831-8971*** *e-mail:* ***ipa@udel.edu*** *fax:* ***302-831-3488***

www.ipa.udel.edu

The Institute for Public Administration (IPA) is a public service, education and research center that links the resource capacities of the University of Delaware with the complex public policy and management needs of governments and related nonprofit and private organizations. IPA provides direct staff assistance, research, policy analysis, training, and forums while contributing to the scholarly body of knowledge. Program areas include civic education, conflict resolution, healthcare policy, land use planning, organizational development, school leadership, state and local management, water resources planning, and women's leadership. IPA supports and enhances the educational experiences of students through the effective integration of applied research, professional development opportunities, and internships. Jerome Lewis is the director of the Institute and can be reached at 302-831-8971.