17th Street Market Commercial Revitalization Plan

Appendix

VCU • Urban and Regional Planning • Urban Commercial Revitalization • Fall 2012

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BACKGROUND

Historical Background

Handed over to the City in 1742[1], the 17th Street Farmers Market, or colloquially *First Market House*[2] in Shockoe Bottom has served as one of the most important civic centers of the city since its beginnings in the 18th century. On any given day, the market would have had people from every ethnic enclave, coming to buy and sell trade and barter everything from muskrats and raccoons[3] to enslaved human beings and produce. The market has seen many changes over years as well as rebuilt three times. Today, the market sits, almost entirely vacant, with one or two vendors, operating per a weekly contractual agreement with the City, often selling local and second hand produce. The structure had Italianate Roofing and a long prominent colonnade, which gave the effect that the market went on indefinitely. The Market was significant to Shockoe Bottom for several reasons: it was an active venue for slave trading, it was the hub of commercial activity in and around Shockoe and it was, as it is today, close to many different transportation hubs, namely the James River and later, in 1901, the Train Station.

[1] Style weekly, *"How Resident Kathy Emerson is pushing the 17th Street Famers' Market into the 21st Century."* December 11, 2001
[2] 2012 Market Season Vendor Handbook. www.Richmond.Gov
[3] Valentine History Center

First Market Built 1854

It is no secret that Richmond was a key player in the global slave trade. In the 17th century, over 100,000 enslaved Africans were brought to Virginia[4]. Shockoe Bottom and the slave trail go hand in hand. Due to its close proximity to the James River, goods, along with enslaved Africans, typically from Benin, were unloaded and brought to public auction less

Picture 1 : First market square, Source: The Valentine Museum

[4] Slave Trade Reconciliation Triangle , www.hmdb.org/Marker.asp?Marker

than 300 meters from the water[5] .The Market was a place where rich and poor, young and old, and folks of all ethnic and racial minorities came. The First Market house, seen above, actually contained city council offices as well as whipping barracks, a "cage" for public humiliation, and a jail. It was a place where a myriad of activities were conducted.

Picture 2 the market as it appeared in 1913. Source: The Valentine Museum

The market's proximity to the railroad, the James River and even land routes like Williamsburg Road, gave it access to a strategic flow of people and goods. First Market was a place for locals to come and conduct business as well as interact. It was by all accounts, a social and civic center. The bell which once adorned a beautiful cupola on the roof seen above would have signaled to all those who could hear it that the market was open for business.

First Market flourished until the 1950s and the structure was eventually torn down in the 1960s. It was rebuilt for a final time in 1984. Since the mid 20th century, the market has seen sporadic periods of success. As of 2010, the city stopped allocating funds for the market.

Picture 3 ***First Market circa 1868, Source: The Valentine Museum***
In 1864, a Second Story edition bearing Italianate Detail was added atop the 1854 structure. Take notice of the markets sheer size. On the left hand side, one can see the original colonnade.

[5] Maps.google.com

Previous Plans

There are 10 previous plans for Shockoe Bottom that range from economic development and beautification to historical preservation. Not many plans focus on re-organization of the 17th Street Market venue as a focal point or anchor.

The Richmond Downtown Masters Plan for the Shockoe Bottom study area includes Shockoe Slip, Tobacco Row, north to Leigh Street, and west to 25th St .This plan calls for bringing back the trolley in Richmond with a loop around Shockoe Slip and Bottom and a connecting loop around VCU. The plan cites burying of utility lines, requiring compatible infill development, and providing affordable parking for residents and visitors as ways to help revitalize the area. Enhancing the pedestrian realm area is another major aspect of the Downtown Master Plan that affects Shockoe Bottom. By planting trees 30’ apart as well as using historic pedestrian scaled lampposts will help to improve the pedestrian landscape and make the area more inviting.

In 2011 and 2012, the City of Richmond completed a Richmond River Front Plan. While a majority of the plan does not apply to our study area, the plan mentions providing shuttle loops over the James River so more people can access the river and there is a noticeable absence of a coordinated parking authority so people are having trouble finding parking where they can leave their car for the day. There are a few

Table 1 : Previous Plans Matrix

	Design	Economic Development	Promotion	Organization
Richmond Downtown Masters Plan	X	X		
Richmond Riverfront Plan		X	X	
Shockoe Economic Revitalization Strategy	X	X		X
17th St. Farmers Market Plan		X	X	
10 Point Plan for Re-investment of Shockoe	X	X		
Shockoe Bottom Land Use Development Strategy		X		
Historical Preservation Plan by Frazier and Associates	X	X		
Richmond Connects: State of Transportation		X		
Arch 2020 Plan				
C.O.R.D. Plan		X		

parking lots in and near our study area that have been shown on a map in the River Front Plan that people are able to leave vehicles for the day. The plan also calls for improving the water quality so the river is healthier for humans and other plants and animals to live in.

In 2011 and 2012, a Shockoe Economic Revitalization Strategy was completed. Its study area is the same as the Richmond Downtown Masters Plan. In this plan, the Main Street Station Concourse will serve as an anchor in the revitalization strategy by having a new design as well as retail tenants to anchor the newly renovated concourse. It could also hold flexible office space. The redesigning of the 17th St. Farmers Market will help to create an urban square feel that is surrounded by restaurants and will become another anchor for the revitalization of Shockoe Bottom. In addition, a new indoor public market could potentially be located in the Main Street Station Concourse. The plan calls for a non-profit entity that has expertise in operations like this to manage the indoor market.

The previous VCU URSP 666 class in 2006 also completed a 17th Street Market revitalization plan. The study area is a little bit larger than this one by extending to 25th St. and Broad St. One of the plan's ideas for revitalizing the 17th Street Market is to increase the number of farmers who are selling their goods at the 17th Street Market. This plan asserts that by increasing the number of vendors and variety of goods sold at the market, the market day experience is more attractive to customers. The plan also calls for a specialty grocery store to be located near the farmers market to potentially complement market days as well as provide additional options for shoppers in the area. This plan also suggests introducing a community park between Franklin and Grace Streets near 17th St. This Park will help to bring people to the 17th Street Market areas well and will provide people with places to sit and eat and enjoy the outdoor environment

In 2005, a 10-point plan for reinvestment in Shockoe Bottom was completed. The plans goals are to beautify the area by planting more street trees, putting the overhead power-lines underground, strict ABC enforcement, better lighting, and an overall clean up of the area. The promotion of economic development is also a large part of the plan.

They City of Richmond completed a Shockoe Bottom Land Use and Development Strategy Plan with a study area, which appears to be mainly the commercial area of Shockoe Bottom. The plan says that vehicle- oriented development is not appropriate and should be discouraged. Mixed use with retail on the bottom and residential on the top floor should fit the human scale. In-fill development should be encouraged and off-street parking should be discouraged. Making the area more pedestrian friendly is the focus of this plan and this will hopefully spur economic development in the study area.

Frazier and Associates completed a Historical Preservation Plan for Tobacco Row as well as most of Shockoe Bottom. This plan illustrated district character, described historic designations, outlined issues and discussed design review options. An appendix included a checklist for design review and maps of historic resources, existing districts, historic classifications, and a proposed design overlay district.

In the Richmond Connects: State of Transportation, plan completed by the City of Richmond it discusses the 5 D's of multimodal mobility planning: density, diversity, design, distance and destinations. It mentions the Shockoe Bottom 2020 plan and its recommended street conversions that include 17th, 19th and Franklin Streets of our study area. This plan incorporates everything that deals with transportation including the Bottom and Back Bus that would provide transportation. The plan includes an on-street parking count including the parking supply and parking count. According to this plan, Shockoe Bottom has 694 spots and 721 cars need spots during peak occupancy times. Parking decks are also addressed in this plan and it points out how poorly designed parking decks ruin the landscape of street.

The focus of the Arch 2020 plan for refugees was to provide jobs and opportunities for refugees who have relocated to the Richmond area. This was accomplished by means of designing mobile lunch kiosks. These mobile carts served multiple platforms: (1) providing employment for the refugee citizen, (2) providing convenient lunches for workers in the downtown area, and (3) serving as a means of integration and interaction between the refugee and the local citizens. Urban renewal is also a focus of this plan to try to reconnect Shockoe Bottom and the Downtown area.

The final plan that has been completed was the C.O.R.D. plan. This plan identifies historical buildings and places as well as places to visit in the Shockoe Bottom area. It represents the collective ideas generated by citizens, business and property owners, and interested groups with a desire to preserve the unique architectural and historic character of Shockoe Bottom while encouraging sensitive infill development on vacant land and the adaptive reuse of vacant structures

Figure 1: Proposed Master Plan by CORD (Citizen's Organized for Responsible Development)

EXISTING CONDITIONS

Safety

The Shockoe Bottom neighborhood is composed of approximately 193 acres located adjacent to downtown Richmond, Virginia. The study area, especially the blocks surrounding the historic 17th Street Market, represent an area with diverse potentials, specifically in becoming an important tourist destination for the city as a whole. Aside from the neighborhood's historic significance, Shockoe Bottom is bordered to the west and northwest by I-95 along with industrial and commuter rail lines and to the southwest and east by the James River, allowing for easy access to this potentially important tourist destination.

This analysis examines the overall safety of the study 17th Street Market area and consists of two sections. The first is a quantitative analysis that breaks down the various criminal activities that occurred in the neighborhood over the past year and compares these crimes to other types of infractions occurring throughout other neighborhoods in Richmond. The second section is a qualitative analysis that features pictures, a testimonial from an initial site walk, and an interview with a commanding officer in the 1st Precinct.

Quantitative Analysis

Data was pulled from the City of Richmond Crime Incident Information System. Nine different crimes were analyzed for the Shockoe Bottom Neighborhood and then compared to the rates of those same crimes for the rest of the city.

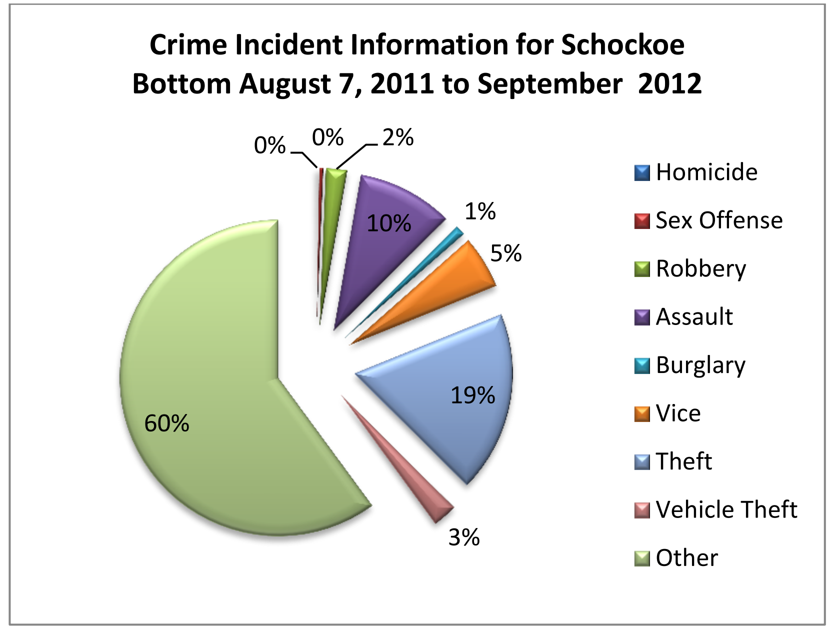

Figure 2

The nine crimes analyzed were homicide, sex offense, robbery, assault, burglary, vice, theft, vehicle theft, and other types of crimes. Last year, the overall incidents within the Shockoe Bottom neighborhood represent a very small proportion of the total crimes within the City's limits. 4.8% of all Richmond homicides happened in the Shockoe Bottom neighborhood in the last year. 2.5% of sex offenses, 2.5% of robberies, 1.5% of all assaults, 0.4% of burglaries, 1.8% of all vice, 2.3% of all theft, 2.0% of all vehicle theft and 23.3% of all other crimes occur in the Shockoe Bottom neighborhood as opposed to the rest of Richmond. Last year in total, Shockoe Bottom only represented 2.1% of all the crime that occurred throughout the city. The Fan neighborhood actually had the largest number of crimes, specifically burglaries and thefts within the last year followed by the Gilpin and Jeff Davis neighborhoods. The charts and table outline the number of crimes by type for the Shockoe Bottom neighborhood and the rest of Richmond.

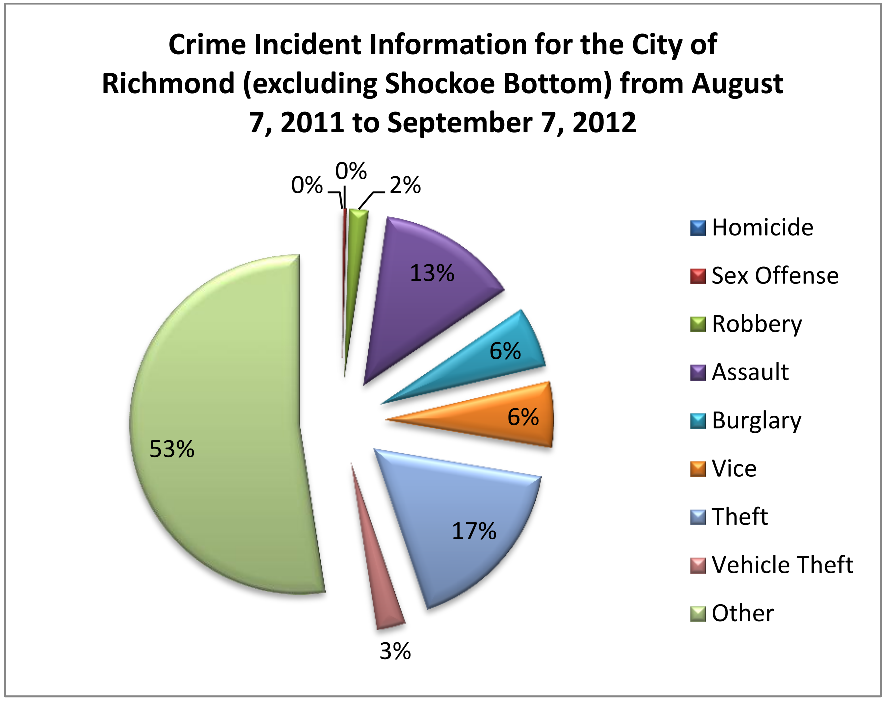

Figure 3

Table 2 Crime Incident Information for Shockoe Bottom August 7, 2011 to September 7, 2012

Crime Type	# Of Offenses
Homicide	2
Sex Offense	3
Robbery	17
Assault	78
Burglary	8
Vice	43
Theft	148
Vehicle Theft	20
Other	480
Crime Incident Information for the City of Richmond (excluding Shockoe Bottom) from August 7, 2011 to September 7, 2012	
Homicide	42
Sex Offense	120
Robbery	681
Assault	5082
Burglary	2216
Vice	2390
Theft	6565
Vehicle Theft	1030
Other	19976
Total	38102

According to Lt. Hudson's numbers, violent crime (murders, felonious assaults, robberies and rapes) throughout all of Sector 112 was on a decline of 6% for most of the year. This put Sector 112 with some of the lowest violent crime numbers the sector has seen in 5 years. Property crimes; however, were on the rise throughout the whole sector. Sector 112 experienced a 70% increase in property crime in the beginning of 2012. These increases were especially in burglaries of residences, theft from vehicles and theft from mopeds.

Qualitative Analysis

Outside of the perceived crime that happens throughout the Shockoe Bottom neighborhood, one of the main concerns for the overall safety of the area is the actual design of the 17th Street Market. The design is of concern because low-hanging awnings meant to "cover" the space and protect market-goers from the sun enclose almost the entire market. Unfortunately, these awnings also provide spaces for hiding and areas for hobos who hop off the trains and for criminal activities.

During the initial site walk on September 7, 2012 at 10:00 am, the overall study area, especially near the 17th Street Market felt safe. However, two homicides that occurred in the Shockoe Bottom neighborhood last year took place around the 17th Street Market. Walking west towards the train station, there were several abandoned cars, broken streetlights, buildings in disrepair, vacant lots and frequent homeless bystanders that definitely give the 17th Street Market area feeling of unease. An attempt at furthering safety for the 17th Street Market and the surrounding area is a police camera at the corner of 17th Street and Franklin Street that consists of outdated technology and no longer functions correctly. The camera is pictured below.

Picture 4

Lieutenant Jason Hudson is one of the commanding officers in the First Precinct. Shockoe Bottom is one of the 24 neighborhoods contained in this Precinct and is further broken down into Sector 112. Lt. Hudson is the commanding officer for Sector 112 and believes the most occurring crimes in the neighborhood are burglaries, residence robberies, miscellaneous types of larcenies, and theft from motor vehicles.

Lt. Hudson believes that violent crimes were on the decrease for most of the year because of active citizen participation throughout the neighborhood. So far, the only month that has seen a slight increase in violent crime is July. Whether being conscious of their surroundings to avoid becoming victims or calling the police department for tips and complaints, a large part of the decreasing crime rates can be attributed to Shockoe Bottom residents.

Lt. Hudson also took note of the abandoned insecure homes and vacant lots that can cause problems for the neighborhood in that they give people places to hang out, hide and participate in crimes and negative activities.

Summary

For the most part, the Shockoe Bottom neighborhood, especially near the 17th Street Market, has more perceived crime than actual crime. Due to the blight of vacant and abandoned properties as well as negative connotations from crime of the area's past, the area has been given a bad reputation when concerning overall safety.

Picture 5

The fact remains that overall crime throughout the entire Shockoe Bottom neighborhood is on the decline and actually represents only a very small proportion of the overall crime occurring throughout the City of Richmond. With minor improvements to safety and the overall aesthetic of Shockoe Bottom, the neighborhood definitely has the potential to be an important tourist destination for the City as a whole.

Traffic Circulation and Parking

There are an estimated 455 on street parking spots in our study area. Cars are not allowed to park on Main St. between the hours of 4 and 6 p.m. on weekdays so traffic can flow more easily. Most on-street parking has a two-hour limit that is enforced by a City of Richmond employee but after 6 p.m., there is no longer any parking limit. The on-street parking on Ambler Street does not have a time limit so it can become almost a car graveyard. This is something that is troubling and should be corrected.

There are an estimated 1,195 parking spots in monitored lots. However only about 560 parking spaces are open to the public and only about 440 of these are in viable parking lots. Two of the parking lots near the Enrichmond Foundation are rundown and I would not feel comfortable leaving my car there for any point of time. Two parking lots that are run by Amtrak can hold a total of 143 cars, which are also available to the general public to use. The parking lot across the street from the Main St. Station is free for the first hour and only 1$ more per hour after the first hour. VCU dominates the parking situation in Shockoe Bottom with their lot holding 498 cars. Another lot that is not open to the public is the 17th Street Market lot. This lot can hold 32 cars. However, the 17th Street Market is about to be re-done so presumably these 32 spots will be eliminated. The large parking deck located on 14th St. and Main St. is operated by the State of Virginia and can also be used for public events in Shockoe Bottom. No one working in the parking garage knew how many parking spots are in the garage itself but an educated guess indicates about 800 spots.

Table 3	Street	AADT
	Main St. BTW. 14th and 18th	17,000
	18th St. BTW Main and Grace	8,800
	17th St. BTW Main and Grace	5,000
	Total	30,800

The traffic count is a different story. VDOT does not maintain traffic counts for every road so there were very few roads that are included in our study area that have traffic counts. Main St. and 18th St. are considered Urban Other Principal Arterial roads that are major roads in the city and they carry heavy traffic. There are many access roads into the study area such as Dock St., Cary St., Franklin St. and 21st St. running north to Church Hill. While Broad Street does not intersect with the study area it carries approximately 22,000 daily between 14th and 18th streets and it take only one turn to enter the study area. Main St. is another way to enter the study. 17th Street Market carries 17,000 cars daily. Interstate 95 connects right into the Broad Street corridor via Exit 74C. This leads to an increase in traffic on Broad Street and if the 17th Street Market becomes more active, it could lead to increase in vehicle and foot traffic in the study area. VDOT included up to 21st from 14th St. in its traffic counts, excluding Cary St. This road moves approximately 6,600 hundred cars daily. 21st as well as Broad Street should both be taken into account in order to assess all of the traffic that could be moving through the 17th Street Market study area.

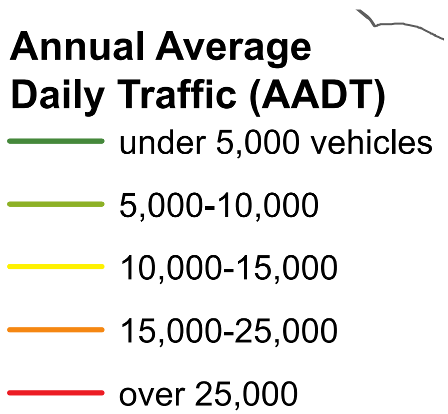

Figure 4

Transportation

The 17th Street Market area provides multimodal transportation services. The Main Street Train Station services Amtrak's Northeast Regional route that runs twice daily from Virginia Beach to Boston. Megabus, a double decker charter bus, has a stop located across the street from Main Street Station that services more than 3,000 customers weekly. In addition, there are over 20 bus stops in the area as illustrated by the map below, Figure 7. The location of the 17th market commercial district in relation to the multiple transportation sources provides a strength that can be utilized to build consumer traffic and eventually create a Transient Orient Development as recommended in previous city plans.

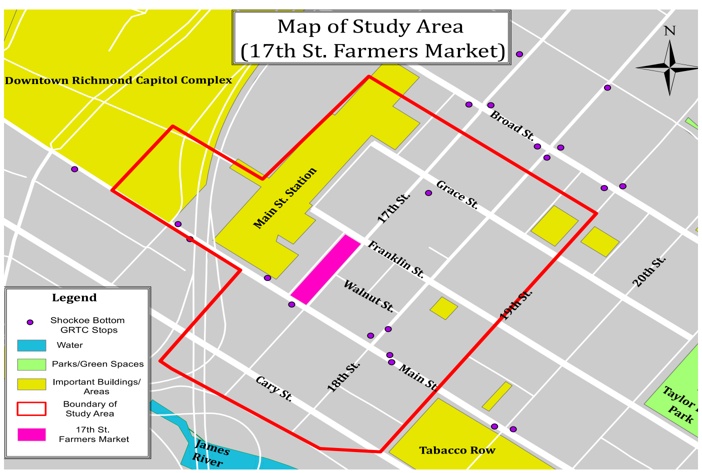

Figure 5 Map of study area showing bus stops and key buildings
Source: VCU, Urban Commercial Revitalization Class, 2012

Land Use

17th Street Market area is comprised of a mixture of land uses. The extent of these uses is shown on the Existing Land Use Map below. The city of Richmond in the Shockoe Bottom Land Use Plan laid out strategies for future land use. The strategies are intended to protect the architectural character of the area, provide for appropriate in-fill of currently undeveloped land, assure adequate accessible parking and vehicular and pedestrian circulation and promote the adaptive reuse of vacant and underutilized buildings in the area.

Figure 6 Existing Land Use Map
Source: City of Richmond Department of Economic Development

Urban Design Analysis

Shockoe Bottom is referred to as the birthplace of the City of Richmond[6]. It is a historic and urban neighborhood reflective of the "Old Richmond" character[7]. It is a transitional district on the east of the Central Business District and the west of the residential neighborhood of Church Hill[8].

In the heart of Shockoe Bottom is the 17th Street Market area. Structures of historic nature and distinct architectural character and style, most built during the 18th and early 19th centuries[9] located within the 17th Street Market area, serve as prominent landmarks, not just for the area but for the city as well. The 17th Street Market area currently generates the most pedestrian traffic in Shockoe Bottom. The grid street layout, walk able block sizes and different paving materials, like cobblestone in some streets and bricks or interlocking pavers in sidewalks, provide a change in texture, slow traffic down and make the area conducive for foot circulation. Streets in the 17th Street Market are mostly one-way, except for Main Street, which serves as a consistent two-way transport access. It is also the most predominantly mixed-use area in Shockoe Bottom[10].

The diversity of uses includes housing, entertainment and commercial activities[11]. Larger brick buildings mostly to the south of 17th Street Market area, once used for manufacturing and nonresidential purposes, are being

Picture 6

Picture 7

[6] Shockoe Bottom Land Use and Development Strategy p,I-1
[7] Shockoe Bottom Land Use and Development Strategy p, II-3
[8] Richmond Downtown Plan, 2009.p,1.17
[9] Shockoe Bottom Land Use and Development Strategy p,I-1
[10] Shockoe Bottom Land Use and Development Strategy p,III-7
[11] Downtown Plan, 2009.p,1.17

adaptively reused and utilized for revitalization[12]. Most of the two or three story brick structures typical in the area, especially visible along Main Street, were designed that the ground floor be used for commercial purposes – restaurants, offices, retail and personal services, while the upper levels were used as residences[13]. The diversity and eclectic mix of uses can be seen in the way restaurants and shops personalize and incorporate their unique theme on their signage and storefronts. In the area around the 17th Street Market venue, where restaurants are concentrated, wider sidewalks serve as the transition of the public streets to the private establishments as seen in their al fresco dining setup.

Picture 8

Picture 9

[12] Shockoe Bottom Land Use and Development Strategy p,III-7
[13] ibid

The 17th Street Market venue itself may have evolved in form but it remains to be a significant and identifiable center of gathering and festivities. Located along a major thoroughfare and its close proximity to the train station, the centrality and visibility of 17th Street Market district complements the image and identity of being a restaurant and entertainment destination.

On the other hand, the potential of the area is not fully attained and maximized. There is inconsistency in the material and landscaping treatment of the streets that could make the space more distinguishable. The lack of sufficient way finding indicators and attraction markers divert people's attention. Although currently a parking deck onsite, on-street parking and vacant properties turned to parking spaces are utilized, parking availability remains to be a recurring problem. There are hidden corners, places with deficient light fixtures and buildings that are unoccupied which can be deemed unsafe for pedestrians and users of the space. On top of the absence of public and green spaces, the area also lacks the connectivity to existing venues or attractions, which could complement the other uses in the area. For instance, linking the 17th Street Market area to the nearby slave trail and archaeological sites or further enhancing the canal trail and strengthening the relationship with the James River. Thus, there remains the untapped potential in the built environment to enhance the consistency, cohesion and identity of this place.

Building Uses

There are approximately 135 buildings in the Shockoe Bottom Study Area with a total square footage of 1,072,162. The largest percentages of building/parcel use per square foot is government/public facilities (30%), parking lots (18%), followed by residential (16%), retail (12%), and office (9%) which is shown on the right is the pie chart in Shockoe Bottom help determine how land-use components within the area conflict with or complement each other. Building conditions can improve or damage revitalization efforts and pedestrian circulation patterns as well as determine the urban scale of the neighborhood. All of these factors influence public perceptions about the area's safety, vibrancy and function.

Most buildings in the district are two to four stories in height and were originally constructed as mills, warehouses and wholesale outlets, with some serving light industry. The majority are of brick construction in a modified Italianate style, with cast iron detailing (some locally made) such as window lintels and storefronts. Most of the district's buildings have new adaptive uses. They now house restaurants, cafes, shops, offices and residences. The district retains a compact urban feeling and contrasts strongly with the cluster of tall modern bank buildings to the immediate west.

The largest buildings lie to the west and north of the Market, including Main Street Station and its vacant train shed as well as the Loving's Produce properties. Adaptive reuse and

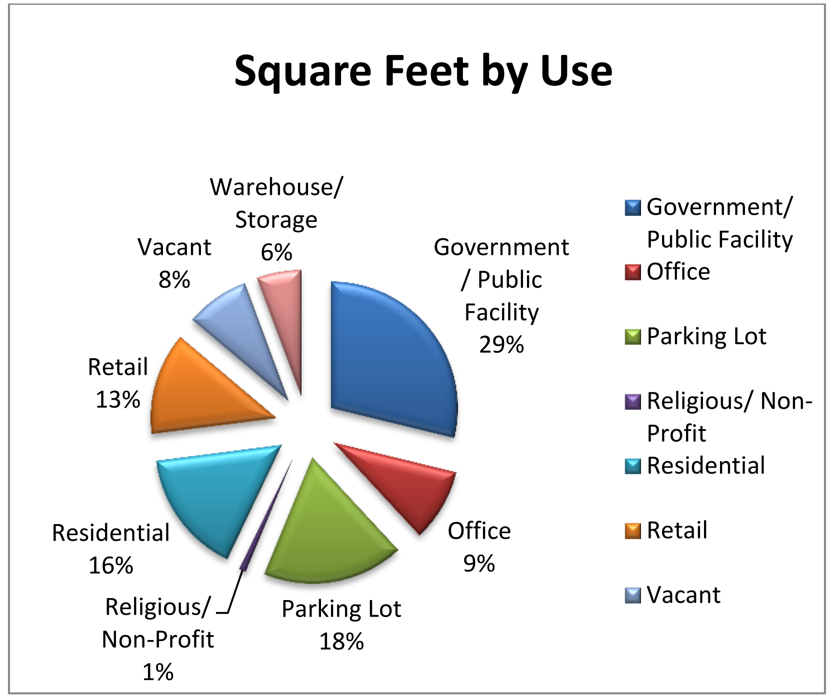

Figure 7

redevelopment of these parcels is currently in the planning stages by the City of Richmond. The plans call for an indoor market, outdoor theatre, retail, hospitality, and residential uses which could enhance the economic vitality of the area surrounding the Market.

The largest concentration of commercial vacancies exists along E Main Street between 18th and 19th street as seen in the picture below. Other major vacancies are located at the corner buildings of 17th and Franklin, 18th and Franklin, and 19th and Franklin.

Picture 10

Picture 11

Building Conditions

To analyze building condition, the Dunbar criteria was used. Buildings received a rating of sound, deteriorating or dilapidated. Buildings that received a rating of dilapidated have several structural problems such as cracked and/or sinking foundations, cracked and/or damaged walls, missing and/or loose material on the roof, and/or rotted trims. The buildings northwest of the Market are poorly maintained and in much need of repair and reuse, as evident by their

Picture 12

deteriorating or dilapidated rating. Other buildings fronting the Market on all other sides is in sound or deteriorating condition. Majority of the dilapidated buildings are corner buildings located in prime commercial space. Overall building conditions are sound, with most deficiencies, such as minor cracks or peeling paint, easily fixed and often located in the rear of buildings. However, there are multiple instances of deferred maintenance throughout the district and in general, public spaces are not as well kept as private areas, giving a perception of poor up-keep. Most of the parking lots in the area are deteriorating with aesthetic values that demonstrate little to no upkeep or attempts to make them better.

Picture 13

Competing Commercial Districts

Lease Markets and Competitors

The residential market in the Shockoe Bottom Area is growing. There are numerous residential locations for various income ranges. The majority of the residences in the area re old converted warehouse apartments, new converted warehouse apartments or 2nd and 3rd floor apartments over retail. The residential rental rates are slightly lower than Short Pump, Cary town and The Fan.

Picture 14

The office lease market in the Shockoe Bottom area is the strongest of all the rental markets in Shockoe Bottom. The prices for office space for 1705 and 1707 E Main Street (Picture below), which is in the heart of our study area is $15/sf/yr. The average for Shockoe Bottom area is $16/sf/yr. When you compare that, to other areas with strong office, markets like Inns brook ($18/sf/yr) and Far West End ($16 /sf/yr) the Shockoe market is similar. It also has higher rates than the Near West End ($15), Stony Point/Huguenot ($14) and numerous other commercial areas around the city. This shows there is a demand for office space in Shockoe Bottom area. People want to have uniquely adapted offices in a historic part of town.

The retail lease market in Shockoe Bottom is lower than most commercial areas. The average for retail space in Shockoe Bottom is $12/sf/yr. When compared to the price at Short Pump ($25.42) the market in Shockoe is much lower. This shows that the retail market in Shockoe Bottom is not in high demand, but with the low retail prices it has attracted lots of restaurants and weekend/late night clubs, which make up the majority of the retail market in Shockoe Bottom. Additionally, a space set up for a restaurant, as with 1704 E Main the rent is higher at $19/sf/yr. This difference in price represents the difference in what a space leases for that could be converted to a restaurant ($12) at the renters' expense, and a space that has already been converted ($19). The lack of traffic through Shockoe Bottom causes retailers to look elsewhere for space but the restaurant market still seems to attract customers.

Table 4: Competing Commercial Districts

Shopping Districts	No. Of Stores	GLA	Retail Rate	Office Rate	1 Bdr Apt	Total Parking Spaces	Street Parking	Parking Deck	Anchor Stores	Neighborhood Stores
17th Street Market	135 +	970,000	$13	$16.71	$800	1,650	■			■
Short Pump	200 +	1,100,000	$25.52	$16.09	$950	5,500		■	■	■
Carytown	300 +	650,000	$20	$15	$900	3,000	■	■	■	■
Laburnum	150 +	800,000	$17	$17	-	5,500			■	■
Willow Lawn	60 +	438,000	$17	$12	$850	2,409			■	■

Regional Commercial Districts

Carytown

Carytown is an urban retail district lining Cary Street at the southern end of the Museum District in Richmond. The district includes over 300 shops, restaurants and offices. The area has become a center for high-end, independent retail shops and boutiques, and is also home to the Byrd Theatre, a restored movie palace that has operated continuously since 1928 and shows second-run films for a $1.99 ticket price. Carytown provides a variety of unique goods and services in addition to three large grocery stores Carytown is also home to the annual Carytown Watermelon Festival, which is the biggest in the United States. Carytown has adequate public parking via street parking and parking decks. Carytown consists of over 650,000 square feet of commercial space with average rental rates ranging between $14 to $20 per square foot.

Short Pump Town Center

Short Pump Town Center is open-air mall that has over 200 stores, including names like Hecht's, JC Penny, Dillard's, Macy's and Nordstrom. Short Pump is spread out into three main sections, each with a fountain and a wide court area filled with benches, where shoppers can rest their feet. Some other stores include after Victoria's Secret, Abercrombie & Fitch, Williams-Sonoma and Pottery Barn. The Town Center has 27 restaurants, specialty food eateries, or quick-services at the food court including Applebee's, Chili', Chipotle and Red Robin. Short Pump is home to the Regal Short Pump 14 theaters and also offers a Summer Concert Series which has drawn thousands of people each year to hear rock, country, 80s, blues and jazz. Short pump mall has surface lot parking and areas surrounding has surface as well except for one section that is accompanied by a parking deck to accommodate residences and shoppers. There is 1,100,000 sq. feet Gross Leasable Area (GLA) and average rental rates are $25, and can go as high as $34 or more per square foot.

Table 5 Shopping Destinations

Shopping Destination	Food at/ Away from Home	Alcohol/ Tobacco	Household Operations	Housekeeping Supplies	Housekeeping Furnishings/ Equipment	Apparel
Short Pump	■	■	■	■	■	■
Carytown	■	■		■	■	■
17th Street Market	■	■				
Willow Lawn	■			■	■	■

Neighborhood Commercial Districts

Willow Lawn

Willow Lawn, Richmond's first shopping center, underwent a $9 million renovation in 2011, creating a open air lifestyle center with new amenities including a community-gathering place with a central stage, a children's play area, new retail storefronts, sidewalks with improved property circulation, central parking and enhanced landscaping. Located at the intersection of Broad Street and Staples Mill Road, Federal Realty, based out of Rockville, Md., owns and manages the property. The parking consists of surface parking with 2,409 spaces. The Shops at Willow Lawn has more than 60 shops and restaurants across 438,000 square feet of retail and office space. The average rental rate is $17 per square foot.

White Oak Village

Approximately 5 miles from 17th Street Market, White Oak Village is located at the intersection of Interstate 64 and Laburnum Avenue in Richmond. Situated on 136 acres, White Oak Village is a destination with 800,000 square feet of shopping and leisure space. White Oak Village features national, regional and local retailers that include anchors like JC Penney's, Lowe's, Sam's Club, Ukrop's, Target, OfficeMax and Pet Smart. Other stores include Ashley Stewart, Dress Barn, Five Below and Kay Jewelers. Dining and specialty food options include Red Lobster, T.G.I. Friday's, Cracker Barrel, Qdoba and Tropical Smoothie. The parking consists of surface parking lots and the rental rate is approximately $17 per square foot.

Venue Characteristics

Many of the vendors at the Market have expressed a need for improved on-site infrastructure in order to better their businesses as a whole. For many of the vendors this includes places for both water and electricity access. Access to these elements would improve vendor offerings, which in turn would serve to boost income generation and improve the 17th Street Market as an overall tourist destination. Parking is also an important aspect of the Market infrastructure. Shoppers and vendors alike have expressed a need for a higher quality and quantity of parking not only for the Market, but also for the neighborhood as a whole. Adding more and better parking will improve the overall user-friendliness of the venue.

Layout and aesthetics are extremely important logistics for a venue as a whole. Many vendors and shoppers alike have expressed a need for improved layout and structures through the 17th Street Market. The creation of a visually striking entrance is necessary to encourage people either driving or walking past the Market to actually stop in, and visit the attraction. It is also necessary to improve the structures within the Market. The development of efficient kiosks or vendor stands is integral to boosting revenue-earning potential. These kiosks or units should not only have access to the newly installed infrastructure within the market for the vendors, but should also be situated in ways that cater to the likes and needs of shoppers visiting the venue.

Maintenance and safety are also very important for the 17th Street Market. There is a need to protect the market-goers from on-site traffic as well as surrounding neighborhood conditions. Currently, the Market has negative connotations associated with the area because of past events and other negative surrounding neighborhood influences. Improved safety and security efforts for the Market as well as the surrounding neighborhood will help to improve the overall feeling of the venue especially when promoting the Market as a tourist attraction.

Another sentiment expressed by market shoppers and vendors alike is a need for more events and entertainment at the venue. Many of the events, though limited, seem to bring temporary success not only for vendors at the Market but also for surrounding businesses throughout the Shockoe Bottom neighborhood. Events and entertainment are also important to bring in new shoppers and keeping the regulars intrigued. The more entertainment and events provided at the Market will help to promote the 17th Street Market as an overall tourist attraction.

Table 6	***Regional Shopping Districts***			***Neighborhood Shopping Districts***	
Retail Category	Short Pump	Carytown	17th Street Market	Willow Lawn	Laburnum
Apparel - Children	■	■		■	■
Apparel - Women	■	■		■	■
Apparel - Men	■	■		■	■
Banking	■	■	■	■	■
Department Stores	■	■		■	■
Electronics, Music, Photography	■	■		■	■
Entertainment	■	■	■	■	·
Food – At/Away From Home	■	■	■	■	■
Health and Beauty	■	■	■	■	■
Home Furnishings	■	■	■	■	■
Hotels	■		■		■
Jewelry	■	■	■	■	■
Shoes	■	■		■	■
Sporting Goods	■	■			■
Toys	■	■		■	■

STAKEHOLDER ATTITUDES

Shopper Intercept Survey

Total Number of Respondents = **90**

1. What is your age range?
Responded = 90

25-34	36.7%	(33)
20-24	21.1%	(19)
55-64	14.4%	(13)
45-54	13.3%	(12)
35-44	10.0%	(9)
Under 19	3.3%	(3)
Over 65	1.1%	(1)

2. What is your zip code?
Responded = 87 (96.7%)
Skipped = 3 (13.3%)

Other	40.2%	(35)
23223	32.2%	(28)
23220	10.3%	(9)
23224	3.4%	(3)
23225	3.4%	(3)
23111	3.4%	(3)
23112	2.3%	(2)
23188	1.1%	(1)
23222	1.1%	(1)
23231	1.1%	(1)
23238	1.1%	(1)

3. What neighborhood do you live in?
Respondent count (N) = 90

Other	43.3%	(39)
Bottom	25.6%	(23)
Fan/ West end	14.4%	(13)
Church Hill	7.8%	(7)
Southside	4.4%	(4)
Swift Creek	1.1%	(1)
Westover Heights	1.1%	(1)
Union Hill	1.1%	(1)
MAYMONT	1.1%	(1)

4. How often do you come to the area?
Respondent count (N) = 90

Daily	46.7%	(42)
Weekly	18.9%	(17)
Monthly	14.4%	(13)
Every Few Months	8.9%	(8)
First Time	7.8%	(7)
Rarely (every six months or more)	3.3%	(3)

5. How do you travel to the area?
Respondent count (N) = 90
Note: respondents may have listed modes of travel

Car	63.3%	(57)
Walk	44.4%	(40)
Bus	11.1%	(10)
Bike	8.9%	(8)
Scooter/Motorcycle	0.0%	(0)

6. On a scale of 1 to 5 how would you rate parking availability? (5 being the best)
Respondent count (N) = 86 (95.6%)

3	38.4%	(33)
2	33.7%	(29)
1	10.5%	(9)
4	9.3%	(8)
5	8.1%	(7)

7. What other districts do you usually shop in?
Respondent count (N) = 90
Note: respondents may have listed several shopping districts

Carytown/The Fan	44.4%	(40)
Other	43.3%	(39)
Short Pump	24.4%	(22)
Broad Street/Willow Lawn	15.6%	(14)
Downtown	8.9%	(8)
Chesterfield Co.	5.6%	(5)
Church Hill	4.4%	(4)
Forest Hills	2.2%	(2)
Williamsburg	1.1%	(1)

8. Do you live in Shockoe Bottom?
Respondent count (N) = 89 (98.9%)

No	71.9%	(64)
Yes	28.1%	(25)

9. Do you work in Shockoe Bottom?
Respondent count (N) = 90

No	73.0%	(65)
Yes	28.1%	(25)

10. Which types of Businesses do you go to most often in the neighborhood?
Respondent count (N) = 90
Note: respondents may have listed several businesses

Restaurants	83.3%	(75)
Farmer's Market	53.3%	(48)
Convenience Stores	30.0%	(27)
Gas Station	23.3%	(21)
Pharmacy	14.4%	(13)
Banking	13.3%	(12)
Other	13.3%	(12)
Art Gallery	7.8%	(7)
Health Care	7.8%	(7)

Beauty/ Personal Care	7.8%	(7)
Automotive	1.1%	(1)

11. How many stops do you typically make when you visit the neighborhood?

Respondent count (N) = 82 (91.1%)

1-2	59.8%	(49)
3	18.3%	(15)
5 or more	11.0%	(9)
4	7.3%	(6)
0	3.7%	(3)

12. Do you ever visit:

Respondent count (N) = 84 (93.3%)

Note: respondents may have listed several attractions

The Canal Walk	73.8%	(62)
17th Street Market	70.2%	(59)
Main Street Station	51.2%	(43)
Slave Trail Sites	22.6%	(19)
Other	15.5%	(13)
None	4.8%	(4)

13. What 3 improvements that you like to see in the neighborhood?

Respondent count (N) = 90

Note: respondents listed several points for improvement

Parking	52.2%	(47)
Safety	35.6%	(32)
Sidewalks	34.4%	(31)
Visual Appeal	33.3%	(30)
Landscaping	27.8%	(25)
Roadways	25.6%	(23)
Lighting	23.3%	(21)
Trees/ Nature	23.3%	(21)
Other	17.8%	(16)
Signage	10.0%	(9)

14. What type of goods do you purchase at the Farmers' Market?

Respondent count (N) = 78 (86.7%)

Note: respondents may have listed several goods

Produce	74.4%	(58)
Crafts	28.2%	(22)
Prepared Foods	14.1%	(11)
Meat and Dairy	6.4%	(5)
None	3.8%	(3)
Other	5.1%	(4)

15. What are your reasons for coming to the 17th Street Market?

Respondent count (N) = 84 (93.3%)

Note: respondents may have listed several reasons

Purchasing Food	39.3%	(33)
Browsing	36.9%	(31)
Just Passing Through	35.7%	(30)
To Get Outside	23.8%	(20)
Relaxing/ People Watching	15.5%	(13)

Other	13.1%	(11)
Touring	8.3%	(7)

16. Have you been to an event or activity at 17th Street market in the past 2-3 years?

Respondent count (N) = 86 (95.6%)

Yes	59.3%	(51)
No	40.7%	(35)

17. How much money do you think you spent at that event/market day?

Respondent count (N) = 81 (90%)

$21+	35.8%	(29)
$11-$20	34.6%	(28)
$0-$5	18.5%	(15)
$6-$10	11.1%	(9)

18. What would you have purchased had it been available?

Respondent count (N) = 67 (74.4%)

Note: respondents may have listed several goods

Fresh Fruits/Vegetables	40.3%	(27)
Other	37.3%	(25)
Crafts	17.9%	(12)
Prepared Food	16.4%	(11)
Meat or Dairy	7.5%	(5)

19. What three improvements would you like to see in the 17th Street Market?

Respondent count (N) = 84 (93.3%)

Note: respondents may have listed several points for improvement

More Vendors	63.1%	(53)
Visual Appeal	39.3%	(33)
Clearly Scheduled Events	33.3%	(28)
Landscaping/Trees/ Nature	32.1%	(27)
Layout Improvement	28.6%	(24)
More People	25.0%	(21)
Safety	19.0%	(16)
Sidewalks	16.7%	(14)
Signage	15.5%	(13)
Other	15.5%	(13)
Lighting	11.9%	(10)

20. What kinds of events or activities would you like to see at this venue?

Respondent count (N) = 73 (81.1%)

Note: respondents may have listed several events/activities

music	61.6%	(45)
Cultural festivals	23.3%	(17)
More People and Vendors	20.5%	(15)
Children’s Activities	9.6%	(7)
Others	9.6%	(7)
Wine and beer tasting	8.2%	(6)
Restaurant Showcase / FOOD RELATED	6.8%	(5)

Arts and CRAFTS	5.5%	(4)
Street Performances	5.5%	(4)
Dance	4.1%	(3)
Play ground	2.7%	(2)
Jobs	1.4%	(1)
Theater	1.4%	(1)
Block Party	1.4%	(1)

Respondents' Characteristics

1. Gender

Count (N) = 83 (92.2%)

Female	59.0%	(49)
Male	41.0%	(34)

2. Race/Ethnicity

Count (N) = 84 (93.3%)

White	70.2%	(59)
Black	25.0%	(21)
Asian	2.4%	(2)
Hispanic	2.4%	(2)
Native American	0.0%	(0)
Pacific Islander	0.0%	(0)
Other	0.0%	(0)

3. Is the interviewee a new immigrant

Count (N) = 76 (84.4%)

No	97.4%	(74)
Yes	2.6%	(2)

4. Time of Day

Count (N) = 84 (93.3%)

12noon-2pm	33.3%	(28)
4pm-6pm	27.4%	(23)
2pm-4pm	19.0%	(16)
10am-12noon	13.1%	(11)
6pm-8pm	7.1%	(6)

5. Location of Survey

Count (N) = 71 (78.9%)

Farmers Market/Main	73.2%	(52)
18th/Main	9.9%	(7)
Farmers Market/Franklin	8.5%	(6)
18th/ Franklin	5.6%	(4)
19th/Franklin	2.8%	(2)
19th/Main	0.0%	(0)

Merchant Survey

1. How long has your business been located in Shockoe Bottom?

10 - 20 years	19%
> 20 years	16%
< 1 year	13%
5 - 10 years	13%
1 year	10%
2 years	10%
3 years	6%
4 years	6%
5 years	0%
n= 0	

2. Age of Customer Base?

35-44	52%
20-34	45%
45-54	29%
All	19%
18+	19%
55-64	16%
Under 18	0%
Over 65	0%
n=0	

3. Gender of Customer Base?

Mixed	71%
Male	13%
Female	6%
n=0	

4. Race of Customer Base?

Mixed	68%
White > 50%	18%
Asian	7%
Black >50%	7%
n=3	

5. Income of Customer Base?

All	23%
30 - 80K	23%
80 – 150K	23%
N/A	19%
> 150 K	19%
10 - 30 K	16%
<10,000	10%
n=2	

6. What is the Customer Proximity to your business?

< 5 miles	19%
n/a	16%
< 10 miles	16%
< 1 mile	13%
< 60 Miles	10%
Global	10%
<30 Miles	6%
n=1	

7. Have sales gone up, down, or stayed the same over the past year?

Up > 10%	35%
Stayed the Same	26%
Up < 10%	10%
Don't Know	10%
Down	6%
Refuse to Answer	6%

n=0

8. What do you plan to do with your business in the next five years?

Stay the Same	48%
Expand	45%
No Response	3%
Relocate	0%
Retire	0%
Close	0%

n=1

9. Do you believe there is good customer circulation through Shockoe Bottom Business District?

Yes	42%
Somewhat	27%
No	23%
N/A	8%

n=5

10. How receptive is your surrounding community towards your business?

Very Receptive	48%
Receptive	29%
Unknown	6%
Not Receptive	0%

n=2

11. Biggest Strengths of Business District?

Historic Buildings/Adaptive Reuse	24%
Location to Downtown and Transit	24%
Good Restaurants	20%
Community Base	16%
Increasing Residential	16%
Other	12%
Farmer's Market	8%
Night Life	8%
Festivals	4%
Mixed Uses	4%

12. Biggest Weakness of Business District?

Parking Conditions	44%
Crime	36%
Late Night Clubs	24%
Infrastructure	16%
Perception Problem	12%
Aesthetics	4%
Noise	4%
Diversity of Business	4%

Slow During the week	4%
n=6	

13. Biggest Strength of Shockoe Bottom Neighborhood?

Historic Buildings	36%
Location	36%
Mixed Uses	21%
Good Restaurants	14%
Increase In Residential	14%
Returning Customers	7%
Potential	7%
Tourist	7%
n=17	

14. Biggest Weakness of Shockoe Bottom Neighborhood?

Crime	36%
Parking	27%
Vacant Building Conditions	23%
Infrastructure	23%
Perception Problem	9%
Cleanliness	9%
Late Night Clubs	9%
Noise	5%
Other	0%
n=9	

15. What is the Vitality of the neighborhood compared to 10 years ago?

More Vitality	38%
Less Vitality	35%
Don't Know	19%
Same	8%
Refuse	0%
n=5	

16. Suggestion on how to improve the business district as a whole

Renovate 17th Street Market	28%
Improve Parking	20%
Baseball Park	16%
Attract Stable Businesses	16%
Improve Security	16%
Keep Public Areas Clean	12%
Restore Streets and Sidewalks	12%
Lower Taxes/ Incentives	12%
Better Advertising	12%
Improve Walk ability	8%
Target College Students	4%
Increase Residential	4%
Create Identity	4%
Renovate Vacant Building	4%
n=6	

17. How would you rate the activity level of the Merchant's Association?

Very active	8%
Active	23%

Neither Active nor Inactive	38%
Not very active	15%
No activity at all	15%
n=5	

18. What are the Benefits of the Merchant's Association?

Unknown	65%
Unified Voice	15%
Event Organization	12%
Support	8%
Improve Night Club Safety	4%
Stop Plan to Eliminate on street parking	4%
Lobbying 17th Street Market Improvement	4%
n=5	

19. How would you rate the success impact of the 17th Street Market venue on the vitality of the business district?

Neither Successful nor Unsuccessful	38%
Successful	31%
Unsuccessful	19%
Very Unsuccessful	12%
Very Successful	0%
n=5	

20. Has the location of 17th Street Market helped, hurt or had no impact at all?

Helped	37%
Hurt	0%
No Impact	52%
Don't Know	7%
Refuse	0%
n=4	

21. How have events at the 17th Street market affected vitality?

Increased Sales	31%
No Impact	27%
Some Help, Some have not	23%
More Foot traffic	19%
Take Away from Parking	8%
n=5	

22. Which events have been better than others?

Shamrock The Block	61%
Shockoe on Half shell	17%
Food Cart Events	11%
Brunswick Stew Festival	11%
Jazz Fest	6%
Italian Festival	17%
Oktoberfest	6%
BBQ	6%
RVA Fest	6%
Cinco De Mayo	0%
n=13	

23. Do you have any suggestions of events that might

benefit both the venue and the business district?

No	40%
Events that don't close the Street	7%
Baseball Stadium/Entertainment Stadium	13%
More Concerts/Events	33%
n=16	

24. How would you rate the overall success of the 17th Street Farmers' Market?

Neither Successful nor Unsuccessful	44%
Unsuccessful	32%
Successful	12%
Very Unsuccessful	8%
Very Successful	4%
n=6	

Vendor Survey

Open Ended Questions Results

I. What other markets do you sell your products at?

1. Festivals and events in Henrico
2. Short Pump Whole foods, Cork's Festival, Riverfront Plaza, and some products in retail stores
3. Richmond Raceway, Downtown lunch crowds, and baseball games
4. South of the James Market, the Great Big Greenhouse in Chesterfield, and some events

II. Where is your workspace/farm located?

1. Hanover
2. Hanover
3. Hanover
4. Hanover
5. Hanover
6. Wherever they set up the truck
7. McKinney, VA
8. Henrico

III. What do you like most about 17th Street Market?

1. Meeting people and getting exercise
2. The historic environment and atmosphere
3. Life
4. Happy and healthy food
5. Convenience, access from interstate, George, low vendor fee, lots of parking, and surrounding restaurants and retail
6. Good sized events
7. George and the facility
8. People, returning customers, and making money

IV. What do you like least about 17th Street Market?

1. Take away Thursday killed the market, George doesn't have enough help
2. Lack of public convenience
3. No problems
4. Not enough people
5. Not many vendors

6. George won't let them run their generator, which they need to operate
7. There are no people there
8. Lack of city support, no contracts

V. What would help you to increase sales at 17th Street Market?

1. Advertisement – The market used to be booming
2. Parking availability – maybe more free parking. Making it convenient for people to come
3. More advertising
4. More advertising
5. Get more vendors and plan more events.
6. They currently cannot sell at the market due to the generator issue- being able to sell there would be the first step.
7. There need to be more people there in order to get Mrs. Yoder's to want to come regularly
8. More city support, market renovation preferably with some enclosed area

VI. How do you feel about proposed changes to 17th Street Market?

1. Hope it will be better, and come with more advertisement and help for George
2. Great. This is long past due, it is encouraging that revitalization is happening. The competition is great for getting people to the area
3. George has no other help, advertising is most needed
4. Needs better management, and more advertising
5. Feel good about making changes, but it is hard to comment, as they do not have the details
6. Food truck court opportunity would be great. They and other vendors they know would support such a venue
7. Feels crowded getting set up in the space. The new plan seems like a step in the right direction
8. Enclosed market area would be nice, wants to keep party nightlife, don't want it to just cater to families and kids, would be nice if the market was 24 hours

VII. Other Comments?

1. George needs more help, especially with cleaning up after festivals. People go to restaurants at night and then party in the market
2. They have had a positive experience with the market so far
3. Advertise the market
4. Private entities → Larger budget, higher cost. Love the urban setting and feel to the market. The structure is in good shape. Homeless people stay in the market
5. Generators make noise→ Having electrical outlet hook ups so vendors do not need to bring their generators. Water is needed by everyone in the food truck community to pass health inspections and they need to have access. RIR has a water and electrical hook up infrastructure.
6. Market needs to have more visibility. More advertisement is needed to draw more people to the market.
7. Upset that GRTC takes people from public housing to Wal-Mart and not to local markets

Foodie Survey

Foodie Survey Overview

An online survey through Survey Monkey was used to acquire valuable information from Richmond (self-identified) Foodies regarding restaurant and fresh market experiences. For the duration of the survey, 206 responses were compiled.

Table 7 Restaurant District	Number of Responses	Percentage
French Quarter New Orleans	15	8.93%
Historic Charleston South Carolina	12	7.14%
Carytown Richmond Virginia	7	4.17%
Georgetown Washington DC	6	3.57%
River District Savannah, Georgia	6	3.57%
North End Boston Massachusetts	5	2.98%
West Village/Greenwich New York City	5	2.98%
The Fan Richmond Virginia	5	2.98%
The Strip in Las Vegas	5	2.98%
Gaslamp / Gas Light Quarter in San Diego California	4	2.38%
Old Town Alexandria Virginia	4	2.38%

Table 8 Reasons	Number of Respondents	Percentage
Variety of Restaurants	63	38.89%
Good Atmosphere	36	22.22%
Quality Food	35	21.60%
Walkability	27	16.67%
Outdoor/Sidewalk Dining	23	14.20%
History/Culture	16	9.88%
Safe	16	9.88%
Vibrant Neighborhood	15	9.26%
Parking/Accessibility	14	8.64%
Variety of Prices	13	8.02%
Authentic	13	8.02%
Original/Unique	11	6.79%
Great Service	9	5.56%
Local Food/Products	9	5.56%

Restaurant Districts Richmond Foodies provided an extensive and diverse list of places they consider as standout restaurant districts. 157 unique locations were tallied and filtered to come up with the top 11restaurant districts. The French Quarters in New Orleans Louisiana and Historic Charleston South Carolina top the list. There are also three Virginia places in the top11. These are Carytown and the Fan, both in Richmond, and Old Town in Alexandria.

The follow up question as to “What made these places special” provided an insight to the top reasons why there are restaurant districts that standout. Of the 162 respondents, the majority at about 40% said Variety of restaurants and food offerings is the number one reason why they identified a restaurant district as special. The responses range from atmosphere of a place to its culture and history to sighting celebrities and presence of trees. There are 14 main reasons after the responses were filtered and tallied.

Dining in Shockoe Bottom

31% of Richmond Foodies who participated in the survey indicated that they dine in restaurants in the Shockoe Bottom area monthly. This was closely followed by 30% who said they dine there quarterly. The Shockoe Bottom restaurants serve as a regular destination for the Foodies in the area.

Great Restaurant Experience

Eight factors for a great restaurant experience were listed for rating. Of these, the most notable factor was Food Quality, in which approximately 69% of the respondents rated it as number one most important thing. Given the overall rating, the other factors that Foodies ranked were Service, Price and Atmosphere. These responses correlate to the top reasons why certain places are considered special restaurant districts. Quality food, Great service, Good atmosphere and Variety of prices are in the top 14 reasons for a restaurant district to be memorable.

Restaurant/Entertainment District around the 17th Street Market

When asked how to describe the restaurant/entertainment district around the 17th Street Market, almost 50% said the place is okay. Another approximately 30% gave it a below average score. Only about 15% considered the area good or great. This indicates potential for the estaurant/entertainment district to be improved.

Farmers' Markets

South of the James is the notable Farmers' Market in the area that foodies frequent. About 76% identified it from a list of Farmers' Markets in or around Richmond as the one, they most often visit. The distant second and third were the Byrd House Market with approximately 14% and Carytown Farmers' Market with approximately 13% of the 148 respondents to this question.

Foodies were also asked to rank the elements they deem as important factors for being a great farmers' market. About 59% selected Fresh Homegrown Food as the most important element. It was the overall rated top factor, followed by Variety of Vendors and Consistency of Vendors. The rating indicates that the products and vendors are the main factors and reasons for a farmers' market to be great and successful. The atmosphere and venue came in at the 4th and 5th place respectively.

Suggested Events or Programs

The 17th Street Market has been a venue for festival and events in the past. When asked to suggest which food / beverage / cultural events and programs could make the Market a regional draw, about 76% wanted more Special Food events. A couple examples of this are the Tomato Festival and the Brunswick Stew Festival. It was followed closely by Music events where locally made beverages are made available (about 64%). Tied in third are Exclusive Market days for locally grown or made products and the Food Cart Derby, both with 54%. About 35% selected Culture-specific events as a possibility.

There were several recommendations of programs or events the Foodies provided. The main program was to strengthen the Market. Many mentioned a consistent market, the market vibe of offering homegrown and hand made products are necessary. Other events suggested to be held in the market are nighttime events, art shows, ghost tours/attractions and food tastings. This offers variety of activities that can be hosted in the Market. The Total Number of Respondents is 206

1. **What are one or two standout restaurant districts - anywhere in the world - that you have experienced? (please refer to open ended results tally)**

Responded = 168 (81.6%)
Skipped = 38 (18.4%)

Reason	Number of Responses	Percentage
French Quarter New Orleans	15	8.93%
Historic Charleston South Carolina	12	7.14%
Cary town Richmond Virginia	7	4.17%
Georgetown Washington DC	6	3.57%
River District Savannah, Georgia	6	3.57%
North End Boston Massachusetts	5	2.98%
West Village/Greenwich New York City	5	2.98%
The Fan Richmond Virginia	5	2.98%
The Strip in Las Vegas	5	2.98%
Gas lamp / Gas Light Quarter in San Diego	4	2.38%
Old Town Alexandria Virginia	4	2.38%

2. **What made those places special to you? (Please refer to open ended results tally)**

Responded = 162 (78.6%)

Skipped or No Answer = 44 (21.4%)

Reason	Number of Responses	Percentage
Variety of Restaurants	63	38.89%
Good Atmosphere	36	22.22%
Quality Food	35	21.60%
Walkability	27	16.67%
Outdoor/Sidewalk Dining	23	14.20%
History/Culture	16	9.88%
Safe	16	9.88%
Vibrant Neighborhood	15	9.26%
Parking/Accessibility	14	8.64%
Variety of Prices	13	8.02%
Authentic	13	8.02%
Original/Unique	11	6.79%
Great Service	9	5.56%
Local Food/Products	9	5.56%

3. **Generally, how often do you eat at restaurants in Shockoe Bottom?**

Respondent count (N) = 203

Top Restaurant District	Percentage	Number
Monthly	31.0%	63
Quarterly	30.0%	61
Weekly	18.7%	38
Annually	15.3%	31
Never	4.9%	10

4. What are the top three most important things for a great restaurant experience (1=MOST important)

Respondent count (N) = 203

Top Restaurant District	Percentage	Number
(Ranked as number 1)		
Food Quality	68.5%	139
Service	10.8%	22
Atmosphere	9.4%	19
Location/Accessibility	4.4%	9
Price	3.4%	7
Food Variety	2.0%	4
Reputation	0.5%	1
Portion Size	0.5%	1
Other	0.5%	1

(Overall rating)	
Food Quality	1.62
Service	3.07
Price	3.65
Atmosphere	3.67
Food Variety	5.03
Location/Accessibility	5.06
Reputation	6.63
Portion Size	7.52
Other	8.70

* Food Quality, Service, Price and Atmosphere topped the list

5. As a restaurant/entertainment district, how would you describe the area surrounding the 17th Street Market in Shockoe Bottom?

Respondent count (N) = 202

Top Restaurant District	Percentage	Number
Okay	48.5%	98
Below Average	28.7%	58
Good	14.4%	29
Bad	7.4%	15
Great	1.09%	2

6. Which farmers' markets do you visit most often?

Respondent count (N) = 148
Note: respondents may have listed several farmers' markets

Top Restaurant District	Percentage	Number
South of the James	76.4%	113
Byrd House Market	14.2%	21
Carytown Farmers' Market	12.8%	19
Monument Market	8.1%	12
Lakeside	8.1%	12
None or they do not shop at Farmers' market	7.4%	11
St Stephens - Libbie Grove	6.8%	10
17th street	4.7%	7
The Market at 1st Fridays	4.1%	6
Huguenot-Robious Road Farmers' Market	3.4%	5
Ashland Farmers' Market	2.7%	4

Other Farmers' Market noted:
Relay Foods (2)
Williamsburg Farmers Market (2)
CSA member
Tricycle Garden Farm Stand at Jefferson Avenue/Marshall St and 21st Streets in Church Hill.
Oregon Hill Market
Gayton Road Farmers Market
Farmer's Market at Turning Basin this past spring
St. John's
North side
Powhatan
The truck that comes to the corner of Patterson and Libbie in the West End.
Chesterfield Town Center Mall
Chesterfield Berry Farm market at Brandermill
Church Hill
Dale City

7. **Please rank the following elements of a great farmers' market in order of importance with 1 being MOST important and 7 being LEAST important?**

Respondent count (N) = 201

Top Restaurant District	Number	Percentage
(Ranked as number 1)		
Fresh Homegrown Food	119	(59.2%)
Variety of Vendors	44	(21.9%)
Venue/Location	15	(7.46%)
Great Atmosphere	14	(6.97%)
Other	5	(2.49%)
Consistency of Vendors	3	(1.49%)
Connection to Vendors	1	(0.5%)
Entertainment	0	(0%)

(Overall rating)	
Fresh Homegrown Food	1.78
Variety of Vendors	2.50
Consistency of Vendors	3.71
Great Atmosphere	4.16
Venue/Location	4.60
Connection to Vendors	5.84
Entertainment	5.71
Other	7.72

* Fresh Homegrown Food, Variety of Vendors and Consistency of vendors were listed as most important elements of a Farmers' market

8. **What other food-beverage-culture events or programs would make 17th street Market a strong regional draw for the food scene?**

Respondent count (N) = 197

Top Restaurant District	Percentage	Number
Special food events (Tomato Festival, Brunswick Stew Festival, etc.)	75.6%	149
Music event(s) that serve locally made beverages	63.5%	125
Locally-grown/made exclusive market days	54.8%	108

Food cart derby	54.3%	107
Immigrant/culture-specific market days	34.5%	68
Other (please specify)		42

Other events/programs listed:

Consistent market:

- Being a consistent market with fresh items and items people actually want to buy
- Why not make it a consistent ACTUAL farmer's market? Like in San Francisco! C'mon!
- Venders-only market would change the game completely.
- support a farmers market vibe
- Locally grown should be the base that your farmers market grows from. Anything else should support that aim, and be tailored for the environment/venue. Over-capacity events can turn people off just as much as under-attended ones.
- A well-stocked consistent market with quality items/foods and well-known GOOD festivals.
- my two cents is that the downtown market is very well suited more for festivals/events to differentiate from SOJ or Byrd House which are much more vendor/local food focused

Products sold:

- Virginia focused. Crafts, local products, arts, culture, musicians, artists, breweries, history!
- Ample parking, clean atmosphere, focused mission (either food or thrift clothing, not both).
- If it's going to be a farmers market, then exclude flea market-type vendors or other that don't
- Revoke the (seemingly) year round/standing merchant permits for some of the vendors who constantly sell the same kitsch/crap on 17th Street. They are doing a disservice to the themed festivals lately. Who wants to buy cowboy hats and antique jewelry during the BBQ Festival or Italian Festival? No one. They are taking up vendor space for others who could make some meaningful themed vendor contributions to festivals.
- 17th St. Market is NOT a farmer's market, it is a flea market. The produce vendors get their produce from a supplier, it is a joke.
- Using actual food producers, farmers, not people who buy from warehouses and try to pass things off as their own. Having artisans that make their own products. Engaging with non-profits to have themed market days, and allowing for a permanent ABC zone where guests can drink, and take beverages out from neighboring restaurants. Encouraging bakeries, butchers, cheese shops, actual food shops to take up residence in the area.
- More vegetarian/vegan options for the love of god!
- I think a variety of cultural foods at one big market would do better. Focus on fresh and local.

Addressing the club issues:

- Removing the clubs that draw scantily clad and/or violent patrons.
- How about cleaning up the nasty clubs and the trash, they leave all over the adjacent streets.
- Clean up the sketchy nightclubs that draw in folks looking to fight and shoot guns on weekend nights.

Activates/Events

- Nighttime events
- All good, as of now, there are not enough events period.
- Food Cart Derby with adequate seating at night...well lit...Italian wedding lights; perfect. Oh, and fix the streets, the violence, the police state, etc.
- I enjoy the ghost tour attraction that departs the farmers market on weekend nights, more cultural attractions like that would be nice.
- Oyster festival (Shockoe on the Half Shell) was so disappointing this year. Should have greater number and variety of vendors selling oysters - oh, and no band was playing
- More things to do in the area besides EAT
- Art shows
- Music event detract from the market area (unless you consider non-rock music) and attract the rough crowds that make the market area non-desirable.
- More prepared foods & tastings

Parking concerns:

- Parking
- Parking, parking, parking!!!!
- Figuring out the parking situation would not hurt, either.
- Make parking easier- there are plenty of vacant lots in the Grace-Franklin area near the farmer's market... make an arrangement for parking validation or free parking!

Market structure issues:

- Take down the awning covering it, not easy to navigate because of it. Also, cleaner sidewalks and better signage for parking
- A permanent market similar to North Market in Columbus
- A permanent structure where you can reliably get lunch or an early dinner.
- Tables for area restaurants to use for al fresco dining a la Charlottesville Downtown Mall

Baseball:

- BASEBALL!!!!
- baseball park
- Having a Mixed Use Baseball Stadium right next door!!!
- People do not dine in the bottom because they think it is dangerous not because the food is not good.
- A way to more completely incorporate the adjacent restaurants at the market. Currently, they are generally just next on the festivals, not part of it.
- I (regretfully) do not think a downtown farmers' market is viable any longer as a central draw.
- it has to be worth the added price compared to what I can get at Fresh Market or Whole Foods
- I mean, you do most of these. Not the probs w/ 17th St.

<u>**Foodie Survey Open Ended Questions**</u>

1. **What are one or two standout restaurant districts - anywhere in the world - that you have experienced?** (respondents listed several restaurant districts)

Top Restaurant District	Number of Responses	Percentage
French Quarter New Orleans	15	8.93%
Historic Charleston South Carolina	12	7.14%
Carytown Richmond Virginia	7	4.17%
Georgetown Washington DC	6	3.57%
River District Savannah, Georgia	6	3.57%
North End Boston Massachusetts	5	2.98%
West Village/Greenwich New York City	5	2.98%
The Fan Richmond Virginia	5	2.98%
The Strip in Las Vegas	5	2.98%
Gas lamp / Gas Light Quarter in San Diego	4	2.38%
Old Town Alexandria Virginia	4	2.38%
Mission District, San Francisco City	3	1.79%
Fisherman's Wharf, San Francisco City	2	1.19%
Ferry Building Marketplace, San Francisco City		1.19%
Chinatown, San Francisco City	1	0.60%
North beach, San Francisco City	1	0.60%
River Walk, San Antonio	3	1.79%
South Congress, Austin	1	0.60
2nd Street District, Austin	1	0.60%
McKinney Avenue District, Dallas	1	0.60%
Gas lamp / Gas Light Quarter, San Diego	**4**	**2.38%**
Arts District / Warehouse District LA	1	0.60%
North End, Boston	**5**	**2.98%**
Quincy Market Square, Boston	1	0.60%
East Side, Boston	1	0.60%
Historic Victorian Area, Cape May	1	0.60%
West Village/Greenwich, New York City	**5**	**2.98%**
Meatpacking District, New York City	3	1.79%
SOHO, New York City	3	1.79%
Little Italy, New York	3	1.79%
Restaurant Row, New York City	2	1.19%
Upper West Side, New York City	1	0.6%
Hell's Kitchen, New York City	1	0.60%
Chinatown, New York City	1	0.60%
Carroll Gardens, Brooklyn New York City	1	0.60%
Upper East Side, Manhattan New York City	1	0.60%
East Village, Manhattan New York City	1	0.60%
Midtown Manhattan, New York City	1	0.60%
Little China, Yokohama (Japan)	1	0.60%
Shilling Night Market, Taiwan	1	0.60%
The Bund in Shanghai, China	1	0.60%
Las Rambles, Barcelona Spain	2	1.19%
Piazzas, Rome	2	1.19%
Madrid Plaza Mercado Cadiz, Spain	1	0.60%
The Strip Brussels Germany	1	0.60%
Left bank, Paris	2	1.19%
Waterfront Cannes France	1	0.60%
Latin Quarters Paris France	1	0.60%
16th Arrondissement Paris	1	0.60%
Town square in Apt, France	1	0.60%
The Plaka in Athens Greece	1	0.60%
River District Dublin Ireland	1	0.60%
Downtown pubs in London (UK)	1	0.60%
Theater District London	1	0.60%
Bloor Street Toronto Canada	1	0.60%
Bloor-Yorkville Neighborhood Toronto Canada	1	0.60%
Duluth Street in Montreal Canada	1	0.60%
Lygon Street Melbourne Australia	1	0.60%
Grand Case St. Martin	1	0.60%
Calle Fortaleza San Juan Purto Rico	1	0.60%
Old Town San Juan Puerto Rico	1	0.60%

Barrio Norte Buenos Aires	1	0.60%
French Quarter New Orleans	**15**	**8.93%**
Garden District, New Orleans	1	0.60%
Pioneer Square Seattle Washington	1	0.60%
Pike Place Market Seattle Washington	1	0.60%
Carytown, Richmond	**7**	**4.17%**
The Fan, Richmond	**5**	**2.98%**
Old Town, Alexandria	**4**	**2.38%**
Shockoe Slip Richmond, Virginia	2	1.19%
Shockoe Bottom Richmond Virginia	2	1.19%
Merchant's Square, Williamsburg	1	0.60%
Ghent/Colley Avenue, Norfolk	1	0.60%
Belmont, Charlottesville	1	0.60%
Pedestrian Mall, Charlottesville	1	0.60%
Church Street Richmond Virginia	1	0.60%
Old Town Manassas Virginia	1	0.60%
Downtown Orlando	1	0.60%
Harbor Area, Key West	1	0.60%
Lincoln Avenue, Miami	1	0.60%
Midtown Chicago	1	0.60%
Greektown, Chicago	1	0.60%
Reading Market, Chicago	1	0.60%
State and Rush Streets, Chicago	1	0.60%
Michigan Avenue, Chicago	1	0.60%
West Loop, Chicago	1	0.60%
Greektown, Detroit	1	0.60%
Georgetown Washington DC	**6**	**3.57%**
Adams Morgan, Washington DC	2	1.19%
U Street Corridor, Washington DC	1	0.60%
Little Italy, Baltimore	2	1.19%
Inner Harbor, Baltimore	1	0.60%
Fell's Point, Baltimore	1	0.60%
Historic Charleston South Carolina	**12**	**7.14%**
Grand Strand Boardwalk Myrtle Beach	2	1.19%
East Bay Street Charleston South Carolina	1	0.60%
River Street or River District Savannah	**6**	**3.57%**
The Plaza, Kansas City	1	0.60%
Westport, Kansas City	1	0.60%
The Strip, Las Vegas	**5**	**2.98%**
Warehouse District in Minneapolis, Minnesotta	1	0.60%
North Market Columbus Ohio	2	1.19%
Germantown Columbus Ohio	1	0.60%
NW 23rd Ave Portland Oregon	1	0.60%
Anguilla Downtown Philadelphia Pennsylvania	1	0.60%
Old City Philadelphia, Pennsylvania	1	0.60%
Strip District Pittsburgh Pennsylvania	1	0.60%
Five Forks in Birmingham Alabama	1	0.60%
I have never heard of a restaurant district anywhere in the world. Regions, cities & neighborhoods become known for their restaurants, but also for the supporting culture and & infrastructure behind them. Please do not make up terms, and then force the concept on the city, organic growth SUPPORTED by government incentives has been shown as the key to success.	1	0.60%
San Francisco	7	4.17%
San Antonio Texas	3	1.79%
Austin food cart pods	1	0.60%
Santa Monica California	1	0.60%

Los Angeles California	1	0.60%
California	1	0.60%
Boston Massachusetts	2	1.19%
New York City	18	10.71%
Manhattan, New York City	3	1.79%
David Burke Town House in New York City	1	0.60%
Dubai	1	0.60%
Mumbai India	1	0.60%
Barcelona Spain	2	1.19%
Spanish Cities	2	1.19%
Venice Italy	2	1.19%
Cinque Terre, Italy	1	0.60%
Florence, Italy	1	0.60%
Tuscany, Italy	1	0.60%
Capri, Italy	1	0.60%
cities in Italy	1	0.60%
Vienna Austria	1	0.60%
Brussels Germany	1	0.60%
Paris France	5	2.98%
Cities in France	1	0.60%
South of France	1	0.60%
Mykonos Greece	1	0.60%
Athens Greece	1	0.60%
Seljuk, Turkey	1	0.60%
Lugano, Switzerland Alsace	1	0.60%
Cork Ireland	1	0.60%
London	1	0.60%
Chelsea London	1	0.60%
Old town squares in Western Europe	1	0.60%
Toronto, Canada	1	0.60%
Seattle, Washington	5	2.98%
Richmond, Virginia	3	1.79%
Charlottesville Virginia	1	0.60%
Bottoms Up Richmond Virginia	1	0.60%
Black Sheep in Richmond Virginia	1	0.60%
The Jefferson Richmond Virginia	1	0.60%
Miami Florida	1	0.60%
St. Augustine Florida	1	0.60%
Tampa Florida	1	0.60%
Chicago Illinois	4	2.38%
Washington DC	3	1.79%
Founding Farmers, Washington DC	1	0.60%
Good Stuff at Capitol Hill, Washington DC	1	0.60%
Baltimore Maryland	2	1.19%
Ashville North Carolina	2	1.19%
Atlanta Georgia	1	0.60%
Madison Wisconsin	1	0.60%
Durango, Colorado	1	0.60%
Columbus Ohio	1	0.60%
Memphis Mississippi	2	1.19%
Philadelphia Pennsylvania	2	1.19%
Pittsburgh Pennsylvania	1	0.60%
Fayetteville West Virginia	1	0.60%
Burlington Vermont	1	0.60%
Portland, Oregon	1	0.60%

2. **What made those places special to you?** (respondents may have listed several reasons)

Top Reasons	Number of Responders	Percentage
Variety of Restaurants	**63**	**38.89%**

- Insanely large range of options (ethnicity, price, atmosphere) easily accessible from anywhere in the city.
- Many people; variety of restaurants; atmosphere...water, nightlife, etc.
- Variety of food/venues. Atmosphere.
- Many food options, walkability, charm
- Variety of non-chain choices
- Number and proximity of restaurants, atmosphere,
- A lot of choices in an easy walking distance. Nightlife, good energy.
- variety
- Richmond has great variety and I live here! San Antonio is the in-laws hometown. It has has a lot of energy and the riverwalk area makes it all accessible.
- High activity, plenty of options and diverse retail and restaurant selection
- Diverse shopping and many eating options
- Lots of options close together
- Ambience, convenience, diversity and integrated into the city
- Diversity and quality of food and types of restaurants
- Many choices of authentic food, with restaurants at all price points surrounded by local residents who were first, second or third generation and provided a great cultural base.
- The amount of street vendors, variety, and freshness The history and quality of the Italian food.
- The variety, atmosphere and price are [mostly] right! Step it up, Shockoe!
- Great variety of restaurants and most within walking distance of each other.
- Great Buffets, Great Variety in Vegas Great Variety, Fresh Ingredients, Lots of new and interesting ideas in San Francisco
- The busy feeling, lots of people around you, lots of restaurants in close proximity
- There were restaurants on every corner. While all of the food was Chinese, there was variety in the type of eating establishment; two story restaurants, to-go only, full menus, or dim sum. I enjoyed the variety of options.
- variety of places/types of food
- The diversity in cuisine and overall appealing appearance of those cities.
- Variety and convenience
- Variety
- Variety of food and pedestrian friendly
- Lots of ethnic variety and all restaurants have free bring your own wine policies.
- Diverse selection of restaurants, many within walking distance of each other, and integral to a thriving and diverse neighborhood.
- East Bay Street in Charleston, SC offers a great selection of restaurants - pubs, cafes, international, romantic, seafood, Italian, rooftop eateries and bars, classy, expensive, inexpensive, tapas... you name it, they have it. Aside from the food choices, the street is lined with great boutiques, specialty shops and galleries to fill your time while waiting for a table. From the bustling crowd, historical buildings, safe environment and cleanliness to the historic lanterns

casting a glow on the sidewalks, this place makes you believe it is one of kind and makes it soo hard to pick a place to eat because you want to try them all.
- Variety of small, local/chef owned restaurants with simple menus and phenomenal food
- Lots of choices for food, atmosphere and entertainment.
- An abundance of very good restaurants very close to each other (5 minutes to 30 minute walk)
- variety of the restaurants
- Variety Energy Felt safe Clean
- Abundance of great restaurants within small geographic 17th Street Market and the history & charm of the respective areas
- Variety (a bakery next to Mexican, next to casual American), LOTS of outdoor seating - even cooler climates.
- Good selection of upscale restaurants serving great food in a walk able area
- Not really districts but within those cities I have found various pockets (districts) of areas which I love to eat. I love the variety of choices. Many of the restaurants are fairly cheap and offer decent sized portions. The restaurants are also vegan-friendly. Along with that, entertainment is very close by!
- large choices in great food and casual ambiance
- Variety, parking, social scene, shopping/eating within walking, outdoor seating, landscaping, safety
- the variety available, the abundance of local products
- Variety of offerings, convenience to get to, parking, public transportation.
- Great restaurants, excellent use and reuse of industrial buildings, artisanal shops and local feel.
- Activity, lots of light, mixture of shopping & restos

Top Reasons	Number of Responders	Percentage
Good Atmosphere	**36**	**22.22%**

- scenery
- I liked Vegas for the restaurants, chefs and atmosphere. The others while different from Vegas had local fare and international fare
- Wonderful surroundings, many choices and good food and beverages
- The Atmosphere. Large, well lit sidewalks. Restaurants with open doors, live music, bistro tables outside.
- Ambience
- It was so home-like feeling yet had the atmosphere of the city. Boston in general is good for that.
- Old South feel. Walking distance to nearby attractions. Took advantage of rivers in both cases.
- The intimacy. Often you can find world-class chefs that still conduct business as if they were not yet famous.
- The 'kicked-back' atmosphere, mature shade trees, wide sidewalks, outdoor dining, lots of pedestrian activity
- The scenery was incredible and everything was clean.
- Ambience, refined cooking, no dumbed-down menus. Good wine lists.
- Great restaurants and atmosphere.
- Clean, friendly, southern charm, oh and clean
- Award winning chefs, young crowd and beautiful setting, public transportation within the corridor
- Southern Comfort food and location near the water
- Both had great atmosphere on the street for pedestrians and lots of outdoor diners spilling on to the sidewalks. The smells of the restaurants were everywhere, and both places had a sense of authenticity and uniqueness.

- Sights, Smells, Sounds - the atmosphere as a whole, using all of the senses to experience. Beautiful scenery, interesting things to look at it, a variety of things to do, delightful smells, relaxing sounds. Ambiance at its finest. I am much more likely to go to a restaurant with really great ambiance or a really cool, fun, different vibe and maybe mediocre/nothing-special food than go to a boring place with delicious, excellent tasting food. I am always up for eating local as opposed to eating at a chain restaurant and I love having the opportunity to take out-of-town guests to some place really cool and different that they could not see or experience elsewhere. For example, some of my favorites: Boathouse, Tobacco Company, Arcadia, Charles City Tavern, even Nacho Mama's in Carytown simply because it's a fun place to be.
- The atmosphere and distinct memory of the visit.
- The overall feel of the space coupled with the quality of the restaurants.
- The options and the overall feel of the area. It was comfortable, yet still intriguing enough to walk around in and look through the windows of restaurants.
- They have a sense of their own identity, and know how to use it. In addition, I like that they are near the water.
- Ambience

Top Reasons	Number of Responders	Percentage
Quality Food	**35**	**21.60%**

- Great food and great atmosphere- not only in the restaurants, but also outside.
- Great food, cool cozy dives yet fancy places too, good music
- Fresh food and variety.
- Lack of chains, focus on quality food. Bar scene is secondary
- Excellent, high-end, exceptional food. Cozy street environment; you felt safe walking to and from your car.
- great food - fresh ingredients - good service
- The level of competition is so high that restaurants must provide super high quality food just to survive.
- The quality of food and not having to pay a lot and the atmosphere
- quality of ingredients, variety of restaurants, intimate dining
- Food and Service
- quality of food
- The food and the settings.
- Good Stuff featured a menu that was small, but done well, with unique dishes and drinks that still has me talking. The look of the place was nice, but not really the appeal. David Burke was all around amazing--the food, the service, the look, I felt like a princess there and my food was perfect and imaginative.
- Combines entertainment, food and spectacle in a concentrated area. I realize that Shockoe Bottom and The Strip have little in common.

Top Reasons	Number of Responders	Percentage
Walkability	**27**	**16.67%**

- Easy to walk around, award-winning restaurants, celebrity sightings
- The water that we have and the area blocked off to be able to walk around without dodging cars.
- Walkability, district was cohesive yet had unique features, quality restaurants
- The ability to walk a few blocks and see so many restaurants/bars that seem to appeal to every interest, and not really competing with each other.
- Being able to walk safely through the clean streets.

- Walkability, multiple options, public transportation, combination of high-end and fast food (5 star restaurants next to a pizza place), late night bars and clubs in vicinity, historical/tourist options in walking distance, heterogeneity of clientele
- Well lit, great crowds, easy to walk around, you park one place and walk to where you want to go, no parking at the door,
- Walkability, historic value to the area, variety of restaurants, art galleries, vibrant culture - both places made you want to stay in the area before, during and after the meal
- Big city is just a part, but proximity to other cool tourism features plus the obvious fine dining.
- Atmosphere, variety, walk ability

Top Reasons	Number of Responders	Percentage
Outdoor/Sidewalk Dining	**23**	**14.20%**

- Eating outdoors and the quality for the price. The prawns in Dubai were almost as big as a lobster tail. I like seafood. Richmond does not seem to be a seafood town.
- I like how they are right next to the street and have large glass doors that open onto the street, like the restaurant Can-Can in Richmond.
- The Plaka has lots of outdoor dining, on the sidewalks and on the rooftop terraces. In Seljuk, Turkey (near Ephasus,) all the restaurants use the common square for their outdoor dining. Greenwich Village in NYC also uses sidewalks for diners when the weather is nice.
- Grand Case, amazing chefs at the time collected together, NYC Little Italy, because it had a great outdoor dining experience.
- All have sidewalk dining, so many options.
- I think one of the most amazing things about the restaurant culture in Paris were the amount of people sitting and dining on the sidewalks. This was a huge draw to want to go inside and experience what these establishments had to offer. It also created a lively streetscape that you wanted to be a part of.
- Soho- outside/sidewalk seating SouthFrance- outside seating in traffic free street.
- Outdoor dining that was integrated into the cityscape.
- Busy hub of culturally diverse people, reasonable pricing, great people-watching, outdoor and indoor restaurant seating, music and entertainment.
-

Top Reasons	Number of Responders	Percentage
History/Culture	**16**	**9.88%**

- Intertwining local points of interest and historical significance with general entertainment
- The culture and the amazing amount of vegetarian choices.
- The history and the integration of the restaurants overlooking the river (complete with cobbled stone streets) is just perfect.
- Cultural heritage, Liberal alcohol policies, architecture
- New Orleans - eclectic mix, history, cultural landmark, relatively security (surrounded by tourists), seafood and it does not shy away from its own identiy. Latin Quarter, Paris - history, love the diversity (bistros and nice restaurants), architecture.
- Unique culture and great food/atmosphere
- Historic architecture, live music (even panhandling music is amusing), narrow pedestrian oriented streets, delicious gumbo, trees, that smelly smell that surrounds you (yeah that one on bourbon).
- Culture
- Both have a distinct mix of cultures being cultural border regions.
- The cohesive neighborhood feel. The history behind it.

Top Reasons	Number of Responders	Percentage
Safe	**16**	**9.88%**

- Safe, people, music, lights
- These places are simple, safe and full of experimentation. The districts are not afraid to try new things, and that allows the patrons the freedom to dream. Dreams drive these districts. An Anniversary is celebrated, a birthday, weddings are held. Dreams drive the districts, into building memories.
- Great restaurants walk ability, safety, and the water.
- excitement, vibrancy, safety
- I love an area of town that is safe and has other stuff going on around the restaurants- shops that are open, a movie theater, etc. Atmosphere is also key.
- Clean, Tidy, Cohesive, Safe, Beautiful
- friendly safe environment with art district

Top Reasons	Number of Responders	Percentage
Vibrant Neighborhood	**15**	**9.26%**

- I could walk to them from our apartment! In addition, there were many options available, the neighborhood was vibrant and the food was good.
- I like Carytown because it feels busy and the window display is mildly entertaining to walk past as you go back to your car.
- Vibrant, pulsing excitement. Variety, great service, style.
- The vibrancy. The way they embraced pedestrians. Their history and beauty. Sidewalks. Trees. Benches. They are clean and free of trash. Well lit. Doors are open. People are dining outside. They feel safe yet interesting.

Top Reasons	Number of Responders	Percentage
Parking/Accessibility	**14**	**8.64%**

- Ease of parking and/or ease of accessibility (public transportation)
- Ample parking in the fringes of the area; no car traffic within the district, which gives people convenient access to the area while encouraging foot traffic. Interesting architecture. A good mix of businesses.
- You can park and walk around comfortably, and go in and out of shops. It is convenient and I feel safe, even when I am alone.
- Church St is closed to vehicle traffic, but has plenty of parking and is very accessible for cyclist and pedestrians. It encourages you to walk around and explore the options. Carytown has a lot of diversity in food type and restaurant type.
- See above. Accessibility to a wide variety of restaurant options, ease of access, other non-dining things to do in the area.
- Accessibility. Inviting. Charming. A lot of options in walking distance.

Top Reasons	Number of Responders	Percentage
Variety of Prices	**13**	**8.02%**

- Quality of food, variety of price points ($ to $$$)
- Lots of authentic variety and price points
- They were family friendly, NO CLUBS, just nice bars and restaurants that had a wide range and elegant feel.
- So many high cost establishments still in business, all next to each other
- lots of variety, inexpensive and interesting dishes
- Value of food vs. price

Top Reasons	Number of Responders	Percentage
Authentic	**13**	**8.02%**

- Unique, authentic places that synced up with the vibe of the city.
- Authentic food from all around the world- being able to try new things.
- In addition to what I noted above, I think what made those places really special was the authentic interplay between people and place. These were spaces that people wanted to be in; they felt alive, welcoming and unique. Attractive places, much like people, exude confidence in the attributes that make them unlike any other place. The landscaping from Vienna transplanted to Boston would have ruined the experience rather than enriched it. So it is not just a matter of plopping down discrete elements, but really identifying the underlying threads of the urban fabric that connect us to a place.
- Authenticity

Top Reasons	Number of Responders	Percentage
Original/Unique	**11**	**6.79%**

- Unique (non-chain) restaurants, great atmosphere, many with outdoor seating, non-smoking, easy access by car or foot (including easy parking)
- originality, boutique feel, convenience
- A unique environment with many dining options. Also a vibrant area that is well kept, well lit and safe.
- Unique, historic, easy to walk, small business.
- Unique, local cuisine made with fresh, local ingredients Thriving night/bar scene
- Original and personal restaurants surrounded by a cohesive, safe, and clean neighborhood. Exciting, unique and local-heavy food vendors mixed with controlled traffic and interesting shops.
- They recognized exactly what and who they were, and that is what they offered their guests. And in the case of the latter, their additional appeal as public gathering places for all the right, socially positive reasons.
- Environment, local culture, unique well presented services and the food was incredible. But it is the atmosphere that plays the biggest role I think. A lot of people can cook really good food.

Top Reasons	Number of Responders	Percentage
Great Service	**9**	**5.56%**

- diversity of ethnic foods, excellent service
- Diversity, great chefs, outstanding service.
- Great service Great food with fresh ingredients
- Many choices for top notch food & service in a popular area that I felt comfortable walking around in
- The ambience, the service and the variety.

Top Reasons	Number of Responders	Percentage
Local Food/Products	**9**	**5.56%**

- The options are local and simple yet innovative. You can dine casually or grab items to take home and make a meal out of them. It is an indoor/outdoor marketplace in a busy area with a beautiful view that also hosts a farmer's market and special community events.
- local food, beer and liquor welcoming atmosphere
- Tons of small locally owned restaurants where the dining rooms opened right out onto the sidewalk. On a pleasant evening, it was like a big food parties.

- Eclectic mix of places with varied prices and locally based (local produce and meats) ingredients
- It is a central location that houses a farmer's market on the weekends but also is an old warehouse that has SEVERAL local vendors permanently there providing food and retail choices. It is a great place for lunch, a great place to find local foods, and a fantastic place to find locally made goods. It highlights the best that central Ohio has to offer and promotes the local food movement. The other thing I enjoy is that it is always open and never looks dead, which is what the 17th Street Farmer's Market looks like whenever I drive by. I also like the fact that you can enjoy the North Market any time of the year because it is a standalone building with the ability to open its doors wide open (garage style) in the spring and summer months. This makes it very inviting, drawing you in with the great smells and wonderful produce inside. I also like the fact that they took a previously dull space and an empty parking lot and made it into the foodie hub of Columbus, Ohio. When you want something special, that is the place to go. Richmond really does not have that all in one place. You can go to Carytown, but it is not what I would consider a foodie hub. I think a place like the North Market that consolidates the offerings of foodie life in a city, makes a place unique; gives it a special feeling. As one of the oldest public market in the nation, the 17th Street Farmer's Market should do that, but it does not.
- Local fish and bustling atmosphere.
- Energy, options and great local food. Both had true markets that catered to locals and tourists alike with lots of prepared food to eat at tables there and nearby restaurants and vendors with fresh food.

Other Reasons	Number of Responders	Percentage
Charming	6	3.70%
Clean	6	3.70%
Lots of People	6	3.70%
City - Restaurant Match	5	3.09%
Entertainment	5	3.09%
Good Music	5	3.09%
Trees	5	3.09%
Well Lit	5	3.09%
Great Chefs	3	1.85%

Other Reasons	Number of Responders	Percentage
Nightlife	3	1.85%
Award Winning Restaurants	2	1.23%
Intimate	2	1.23%
Simple	2	1.23%
Celebrity Sightings	1	0.62%
Liberal Alcohol Policies	1	0.62%
Vegetarian Choices	1	0.62%
Window Displays	1	0.62%

- Trees, urban environment with other attractions (cinema, bookstores, etc.) in addition to restaurants.
- Really? It is NYC and Vegas!
- They did not focus on the Restaurants.
- Attention to detail in the food. Willing to experiment. BUT! It is still recognizable as food.
- The cutthroat nature of the NY restaurant crowd means those restaurants that survive are exceptional. The problem with small-scale restaurant "districts" is too many bad options will appear to fill in a gap, and that will sink the good restaurants as well. That said, many would not consider the Bottom a restaurant district at all. It is more of a gritty, gang-style nightclub district that is only slightly palatable during daylight hours and not at all at night. Any hope of developing a

restaurant district in the Bottom hinges on using zoning and alcohol laws to starve out the nightclubs that plague the 17th Street Market and keep chefs and patrons from considering this a viable option for food. I predict you will see a more vital restaurant district emerge naturally in the 21st to 28th / Marshall to Main corridor because those streets are far friendlier and lack the nightclub atmosphere and nightly required police presence.

- The downtown area, is blocked off on weekend nights with entertainment up and down the street, the city runs several concession stands for beverages.
- I lived there

Business Interviews

Open and Closed Ended Questions

I. Do you plan to expand?

- Yes 56%
  - Yes: Online 20% of Total Yes's
  - Yes: in Richmond 30% of Total Yes's
- No* 39%
- Maybe * 6%

1. **Common Responses:** Business Paid Off, New Business, Already Have Several Stores, Current Store Has Private Parking Lot in Carytown (Desirable), Trying To Survive & Enjoy Current Location.
2. **Maybe:** If there was more certainty about future property tax rates*

II. Describe your customer base?

Common Responses

Lawyers, Doctors, College Students, Baby Boomers, Contractors, Hospitals, Public Schools, "Mom and Pop" Shop's, Walk-Ins, Out-of-Towner's, High School Students, Families, People Who Are "too busy", Ethnic Minorities, Pet Owners, Large Corporations, Buyers Seeking an Educated Salesperson, A Buyer Seeking 1-on-1 Interaction, Handmade Gift Seekers, the Upper Class, The Erudite, Generation X-er's, and Retirees

III. Would you do business in Shockoe Bottom?

- Yes 11%
- Only If* 17%
- No* 56%
- Not Sure 11%
- Other* 6%

1. **Only If:** Rent was cheap, building was proper size, & If Competing Were Retail Present.
2. **Other:** Currently In Shockoe Bottom
3. **Common responses for "No":** Parking is Bad, No Foot Traffic, Do not want two stores in Richmond, Needs Funding (501(3) c.), and Location is "Bad".

IV. What do you like most about Shockoe Bottom?
Common Responses

- Architecture 17%
- Historical 28%

- No Comment 11%
- The Market 11%

Other Poignant Responses:
Fast growing, Neat Area, People Want Things to Happen There, Close to Church Hill and Lots of Families, The Canal, Good Night Life, The Train Station, Good Restaurants, High Density Development, Adaptive Reuse of Buildings and “No Comment”.

IV. What do you like least about Shockoe Bottom?

- Clubs are Chaotic at Night 22%
- The Perception of Crime 39%
- Parking 22%
- Traffic 17%

Poor Lighting, Too Many Police, Bad Reputation, Low Foot Traffic During Day, The Homeless, Trash, Wishes It Felt More Like Georgetown, Feels Dangerous, Alcohol Laws Too Strict (Should Be More Like New Orleans/Savannah) Dense Concentration of Graffiti, Not Family Friendly, No Retail and Lack of Business Anchors.

MARKET ANALYSIS

Neighborhood Market Analysis

Market Area Demographics

There are eight census tracts comprising the Market Analysis’ primary study area for Shockoe Bottom’s Farmers’ Market (17th Street Market area). These are Tract 203, Tract 204, Tract 205, Tract 206, Tract 207, Tract 208, Tract 302 and Tract 305[1]. These tracts are within a 5-minute drive time around 17th Street Market area. The study area’s demographics can provide an insight on the characteristics and capacity of potential shoppers living in the area. Using the Decennial Census numbers, the population percent change for 17th Street Market area was found to be relatively similar to that of the city for the period of 1990 to 2000. It had a slight decline in population at -3.04%, compared to the -2.59% for the City of Richmond. 5 out of 8 Census Tracts experienced population loss. Census Tract 305 cited the highest rate of decline at -18.67% while Tract 205 showed the highest rate of growth at 28.23%.

However, for the following decade (2000 to 2010), the growth of the study area has been greater than the city’s population percent change. 17th Street Market area saw a 14.69% growth, compared to the city’s 3.25%. Growth was primarily observable in Census Tract 305 and Census Tract 205, with 73.89% and 70.25% population gain respectively. Census Tract

208 cited the greatest decline at -17.74%. At the same time, Census tracts 203, 204 and 207 also experienced slight decrease in population. While Census tracts 203 and 302 had a population increase. In general, for the period between 1990 and 2010, the percent of population change in the Farmers' Market Area saw greater rate of increase than the whole of Richmond City. The table below (Table 1: Population Trends, 1990-2010) cites the population trend comparing the City of Richmond and the census tracts the study area covers.

Population by Census Tract

Of the 8 census tracts within the primary study area, Census Tract 204 cites the largest population. It accounts for 24.60% of the study area's population. It is followed by Census Tract 305 with 19.38% and Census Tract 205 with 18.52%. Census Tracts 204 and 205 are centrally located in the study area, while Tract 305 is at the southwest portion, bordering Tract 205. On the other hand, the census tract with the smallest population is Census Tract 207 with 5.56%. This is situated at the eastern portion of the primary study area.

Population by Age

The Primary Study Area's population distribution by age is mostly deviated from the City's. The study area's age distribution shows that it is mainly composed of 20 to 24 and 25 to 34 years old inhabitants, making up 43.63% of the study area's entire population. It is also in these age groups that the study area has a greater percentage than the city. For age group 20 to 24, the city has 13.17% versus the study area's 19.78%. For age group 25 to 34, the city has 17.25% versus the study area's 23.85%. In all other age groups, the study area has fewer population numbers or lower percentages than the city, particularly in the age groups accounting for children (below 19 years old: City 23.51% versus Study Area 18.16%) and elderly (above 65 years old: City 11.08% versus Study Area 6.72%).

Table 9: Population Trends by census tract, 1990-2010

	POPULATION			**PERCENTAGE CHANGE**		
Census Tract Number	1990	2000	2010	1990 to 2000	2000 to 2010	1990 to 2010
203	2,013	1,889	1,630	-6.16%	-13.71%	-19.03%
204	5,311	5,520	5,115	3.94%	-7.34%	-3.69%
205	1,764	2,262	3,851	28.23%	70.25%	118.31%
206	1,519	1,540	1,544	1.38%	0.26%	1.65%
207	1,471	1,276	1,155	-13.26%	-9.48%	-21.48%
208	1,823	1,714	1,410	-5.98%	-17.74%	-22.65%
302	1,946	1,609	2,055	-17.32%	27.72%	5.60%
305	2,849	2,317	4,029	-18.67%	73.89%	41.42%

Significantly, the census tracts where the 20 to 24 and 25 to 34 populace reside are either in Tract 205 or Tract 305. These are the south central and southwestern portions of the study area. Census tract 204 or the north central portion on the other hand, houses the majority of the rest of the population, specifically those below 19 years old. The said tract accounts for 41.90% of the study area's population below 19 years old. The census tracts where the elderly resides are in Tracts 203 and 204 or at the northeastern and north central portion of the study area.

The majority of the primary study area's population is college students, newly graduates and young professionals. It also shows an area pocket where a high percentage of children reside, suggesting that there are also young families living within the study area.

Household by Income

The biggest percentage of household population in the primary study area, at 19.10%, earns less than $10,000. This is slightly higher than the City of Richmond's 12.92% who earns the same amount. On the other hand, 11.09% of the study area's household population is earning $50,000 to $59,999, compared to just 7.84% for the city. For the rest of the income breakdown, the percentage of household population for the city and the study 17th Street Market are relatively similar.

The average household income for the primary study area is $33,434.27, which is slightly lower than the average household income for the City at $38,366.00. It is observable that across the study area, there is significant disparity in household income. Census Tracts situated at the south central and southeastern portions of the study area have the highest median income, particularly Tract 208 represents 142.96% of the Richmond median household income. Whereas, Census Tract 204, in the north, and Census Tract 207, in the east, have the lowest median income at approximately 38% of the City average.

Table 10
Median Household Income

City of Richmond	$38,266
Study Area	$33,434
Census Tract 203	$27,431
Census Tract 204	$14,318
Census Tract 205	$50,258
Census Tract 206	$50,116
Census Tract 207	$14,891
Census Tract 208	$54,706
Census Tract 302	$39,722
Census Tract 305	$21,134

Table 11
Median Household Income as a Percent of City's Median Income

Census Tract 203	71.69%
Census Tract 204	37.42%
Census Tract 205	131.34%
Census Tract 206	130.97%
Census Tract 207	38.91%
Census Tract 208	142.96%
Census Tract 302	103.80%
Census Tract 305	55.23%

The population in the study area who is eligible to work (population 16 years and over) is approximately 86% (16,672) of the area's population. Approximately 61% of the potential worker population is in the civilian labor force and 87% (8,812) of the civilian labor force is employed.

Gender, Race and Ethnicity

The total population of the study area is 20,789 or about 10% of the City of Richmond's population. The study area is composed of approximately 53% male (11,061) and approximately 47% female (9,728). It is primarily comprised of African American (54.10%) and White (35.80%). Compared to the city's racial population distribution, the percentage of African American in the study area is higher (City: 50.60%) while its White population is lower (City: 40.78%). The primary study 17th Street Market is also cites a higher percentage of Asians at 6.31% compared to the 2.33% of the City. Across the census tracts, there are notable differentiations. Both Tracts 203 and 204 are more than 93% African American, closely followed by Tract 207 with more than 80%. Tracts 205, 206 and 208 are more than 58% White. Tract 305 cites the highest concentration of Asians in the primary study 17th Street Market area almost 22%. Lastly, Tract 302 presents a more balanced number between African American and White (at more than 40%) and Asians and Other races (at almost 6% each).

Persons of Hispanic origin represent approximately 3% of the population in the area, half of the city's 6%. Census tracts in the western portion of the primary study area cite a slightly higher percentage of persons of Hispanic origin, representing 4.04% in Tract 302 and 4.37% in Tract 305. Census Tracts 203 and 207, at the northeast portion of the primary study area, cites the least percentage of Hispanic population at 0.74% and 1.56% respectively.

Tenure

Majority of the households in the primary study area is renter-occupied. The study area's 76.69% is significantly higher than the City's 56.86% renter-occupied housing. Most of the renter-occupied housing is located in the center (Tracts 204: 83.37% and 205: 88.61%) and the southwest (Tract 305: 93.74%) portion of the study area. On the other hand, there are two census tracts reflecting higher percentage of owner- occupied housing compared to the city's 43.14%. These are Census Tract 203 (59.79%) and Census Tract 208 (53.28%) located at the northeast and southeast portions of the study area respectively.

Educational Attainment

The 5 census tracts located at the west and south of the study area cite higher percentages of population 25 years and older possessing Bachelor's Degree or higher in comparison to the city's 34.1%. Tracts 205, 206, 208, 302 and 305 present percentages ranging from 38.5% to 62.4%. It is to be noted that the highest population of ages 25 to 34 are also living within these tracts (205 and 305). However, the overall educational attainment in the study area, at 31.8% with Bachelor's degree or higher, is slightly lower than the city's. This may be attributed to the low percentages cited by Census Tracts 203, 204 and 207, all located in the study area's north and northeast.

Market Supply and Demand

The market analysis is performed to identify unmet demand in the market for retail goods and services. These goods and services are the ones demanded by customers and will be the basis of recommended business types in the said study or trade area. These recommendations of potential new businesses will complement the existing business in the Farmers' Market Area.

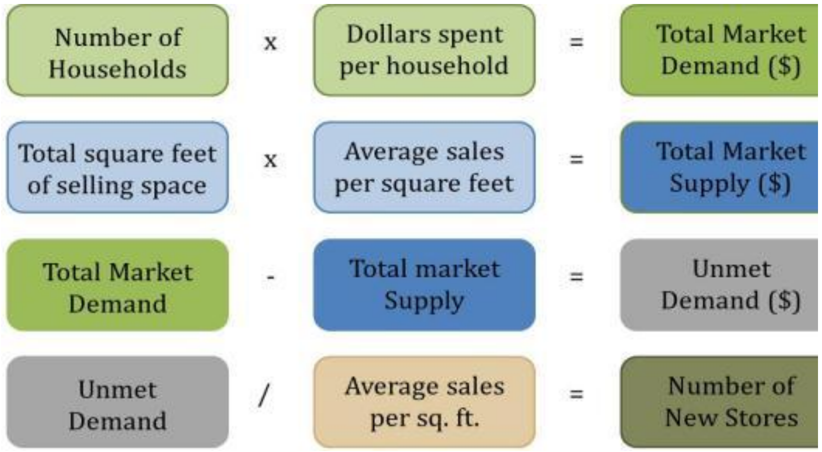

Figure 8 Market Analysis Calculation Method

In order to determine the unmet demand, the first step is to calculate the total spending power of the primary study area using the 2010 Consumer Expenditure Survey[7]. Percentages of expenditure on different categories of goods and services were cross-referenced with the household numbers in the study area from the 2010 U.S. Census Data. The potential expenditure or the total dollar amount of demand in the Farmers' Market primary study area totals to $332,441,661.

Table 12

Five Minute Drivetime: Estimated Annual Expenditures, Shockoe Bottom Farmers' Market (Primary Area), 2010											
	Household Income Range		$5000 to $9,999	$10,000 to $14,999	$15,000 to $19,999	$20,000 to $29,999	$30000 to $39,000	$40,000 to 49,999	$50,000 to 69,999[1]	$70,000 and over[1]	Potential Expenditure without New Housing Units
Category	Average Annual Expenditures		$18,297	$19,909	$24,935	$29,158	$35,556	$40,616	$47,966	$80,708	$297,145
	Number of Households 2010		1,614	907	504	1,007	882	736	1,358	1,444	8,452
	Total Expenditures		$29,531,358	$18,057,463	$12,567,240	$29,362,106	$31,360,392	$29,893,376	$65,153,143	$116,516,583	$332,441,661
Item											
Food at Home			$7,925,454	$3,214,417	$1,819,349	$3,284,901	$2,738,915	$2,267,363	$4,057,433	$2,583,909	$27,891,741
Grocery		65%	$5,151,545	$2,089,371	$1,182,577	$2,135,186	$1,780,295	$1,473,786	$2,637,332	$1,679,541	$18,129,632
Conveniece		25%	$1,981,363	$803,604	$454,837	$821,225	$684,729	$566,841	$1,014,358	$645,977	$6,972,935
Specialty (Deli, Bakery, Open Air Market...)		10%	$792,545	$321,442	$181,935	$328,490	$273,891	$226,736	$405,743	$258,391	$2,789,174
Food away from home			$3,303,186	$1,273,448	$833,838	$1,422,244	$1,666,263	$1,418,021	$2,874,290	$2,184,366	$14,975,656
Sit Down Resturants		50%	$1,651,593	$636,724	$416,919	$711,122	$833,132	$709,010	$1,437,145	$1,092,183	$7,487,828
Fast Food		50%	$1,651,593	$636,724	$416,919	$711,122	$833,132	$709,010	$1,437,145	$1,092,183	$7,487,828
Alchoholic beverages			$482,324	$183,354	$114,293	$204,352	$274,252	$220,522	$500,307	$367,256	$2,346,659
Household Operations			$1,037,727	$541,466	$328,504	$571,951	$553,918	$476,460	$1,020,406	$958,498	$5,488,929
Personal services		65%	$674,522	$351,953	$213,527	$371,768	$360,046	$309,699	$663,264	$623,024	$3,567,804
Other household expenses			$760,025	$406,816	$260,215	$442,763	$424,911	$350,830	$711,425	$586,197	$3,943,182
Laundry		25%	$190,006	$101,704	$65,054	$110,691	$106,228	$87,707	$177,856	$146,549	$985,795
Dry Cleaners		10%	$76,003	$40,682	$26,022	$44,276	$42,491	$35,083	$71,143	$58,620	$394,318
Housekeeping supplies											
Laundry and cleaning supplies			$390,974	$144,677	$70,445	$137,409	$109,160	$96,896	$166,036	$104,930	$1,220,528
Other household products			$482,324	$250,679	$139,452	$267,772	$205,689	$194,460	$352,964	$269,388	$2,162,728
Postage and stationary			$347,127	$97,407	$53,193	$95,129	$81,193	$73,507	$134,148	$111,993	$993,697
Housekeeping furnishings and equipment											
Household textiles[4]			$241,162	$70,190	$41,692	$70,466	$50,520	$48,782	$92,364	$95,850	$711,026
Furniture			$515,209	$161,867	$139,452	$221,969	$193,961	$184,436	$370,557	$324,880	$2,112,332
Floor coverings			$18,270	$5,730	$7,907	$11,744	$9,021	$22,052	$37,386	$38,844	$150,955
Major appliances			$149,813	$88,812	$80,509	$108,048	$160,582	$112,266	$267,197	$180,601	$1,147,827
Small appliances, miscellaneous housewares			$168,082	$57,298	$41,692	$63,420	$110,964	$49,450	$117,655	$87,274	$695,835
Miscellaneous household equipment			$957,339	$316,571	$193,364	$399,309	$391,531	$326,773	$635,555	$619,997	$3,840,439
General Hardware		20%	$191,468	$63,314	$38,673	$79,862	$78,306	$65,355	$127,111	$123,999	$768,088
Garden/Florist		10%	$95,734	$31,657	$19,336	$39,931	$39,153	$32,677	$63,555	$62,000	$384,044
Apparel and services											
Men and boys			$602,904	$368,656	$102,683	$298,945	$314,846	$188,446	$355,163	$356,662	$2,588,306
Women and girls			$1,571,206	$960,741	$223,311	$537,429	$519,307	$355,508	$768,603	$546,848	$5,482,954
Children under 2			$255,778	$156,400	$49,846	$100,768	$86,551	$58,806	$94,563	$64,068	$866,780
Footware			$778,295	$475,902	$139,570	$314,060	$349,968	$207,157	$305,682	$218,437	$2,789,070
Other Apparel Prod. & Services[5]			$343,473	$127,488	$115,012	$149,154	$125,398	$112,266	$183,629	$269,893	$1,426,312
Alterations/Shoe Repair		15%	$51,521	$19,123	$17,252	$22,373	$18,810	$16,840	$27,544	$40,484	$213,947
Jewerly/Watches		85%	$291,952	$108,365	$97,760	$126,781	$106,589	$95,426	$156,085	$229,409	$1,212,366

Five Minute Drivetime: Estimated Annual Expenditures, Meadowbrook Area, 2006 (continued)	Household Income Range		$5000 to $9,999	$10,000 to $14,999	$15,000 to $19,999	$20,000 to $29,999	$30000 to $39,000	$40,000 to 49,999	$50,000 to 69,999[1]	$70,000 and over[1]	Potential Expenditure without New Housing Units
Category	Average Annual Expenditures		$18,297	$19,909	$24,935	$29,158	$35,556	$40,616	$47,966	$80,708	$297,145
	Number of Households 2000		1,614	907	504	1,007	882	736	1,358	1,444	8,452
	Total Expenditures		$29,531,358	$18,057,463	$12,567,240	$29,362,106	$31,360,392	$29,893,376	$65,153,143	$116,516,583	$332,441,661
Transportation											
Maintenance and repairs			$1,059,650	$826,953	$898,626	$602,416	$538,602	$503,038	$373,796	$287,194	$5,090,275
Auto Repairs		60%	$635,790	$496,172	$539,176	$361,449	$323,161	$301,823	$224,277	$172,316	$3,054,165
Tires		30%	$317,895	$248,086	$269,588	$180,725	$161,581	$150,911	$112,139	$86,158	$1,527,082
Parts		10%	$105,965	$82,695	$89,863	$60,242	$53,860	$50,304	$37,380	$28,719	$509,027
Public transportation			$537,133	$184,786	$132,264	$259,551	$245,384	$191,787	$446,428	$509,517	$2,506,849
Health care											
Medical services			$453,092	$330,896	$239,369	$655,336	$531,364	$371,546	$809,288	$597,296	$3,988,185
Nursing home		15%	$67,964	$49,634	$35,905	$98,300	$79,705	$55,732	$121,393	$89,594	$598,228
Medical facility		85%	$385,128	$281,262	$203,464	$557,036	$451,659	$315,814	$687,894	$507,701	$3,389,958
Presciptions & Drugs			$591,943	$591,602	$309,095	$505,008	$422,204	$330,114	$542,091	$310,251	$3,602,307
Non-prescription		50%	$295,971	$295,801	$154,548	$252,504	$211,102	$165,057	$271,045	$155,125	$1,801,154
Prescription		50%	$295,971	$295,801	$154,548	$252,504	$211,102	$165,057	$271,045	$155,125	$1,801,154
Medical supplies			$138,851	$78,785	$52,474	$103,350	$101,040	$64,152	$111,057	$97,363	$747,073
Entertainment											
Fees and admissions[6]			$401,936	$156,137	$97,760	$191,433	$263,427	$230,545	$549,788	$637,149	$2,528,176
Video rental		50%	$200,968	$78,069	$48,880	$95,717	$131,713	$115,273	$274,894	$318,574	$1,264,088
Sports/Recreation		25%	$100,484	$39,034	$24,440	$47,858	$65,857	$57,636	$137,447	$159,287	$632,044
Clubs/Community Center		25%	$100,484	$39,034	$24,440	$47,858	$65,857	$57,636	$137,447	$159,287	$632,044
Television, radios, sound equipment			$1,662,555	$753,469	$462,924	$809,187	$724,423	$606,769	$1,143,558	$691,632	$6,854,517
Electronics		60%	$997,533	$452,081	$277,754	$485,512	$434,654	$364,061	$686,135	$414,979	$4,112,710
Music Products		40%	$665,022	$301,387	$185,170	$323,675	$289,769	$242,707	$457,423	$276,653	$2,741,807
Other Entertainment, Equipment & Srevices			$281,355	$163,299	$52,474	$173,817	$150,658	$100,905	$354,063	$399,542	$1,676,115
Pets, toys, and playground equipment			$774,641	$332,328	$244,401	$448,635	$398,748	$342,143	$665,243	$510,022	$3,716,161
Reading/Bookstore			$109,619	$60,163	$38,098	$77,513	$70,367	$52,123	$103,360	$84,247	$595,490
Personal care products[7]			$990,225	$355,248	$241,526	$459,205	$374,391	$323,432	$621,260	$486,312	$3,851,597
Beauty		60%	$594,135	$213,149	$144,915	$275,523	$224,634	$194,059	$372,756	$291,787	$2,310,958
Barber		30%	$297,067	$106,574	$72,458	$137,761	$112,317	$97,030	$186,378	$145,893	$1,155,479
Products		10%	$99,022	$35,525	$24,153	$45,920	$37,439	$32,343	$62,126	$48,631	$385,160
Education			$3,189,913	$678,981	$274,592	$463,903	$405,063	$319,422	$705,927	$1,133,550	$7,171,352
Tobacco products and smoking supplies			$1,220,425	$449,789	$247,276	$440,414	$362,663	$288,683	$453,025	$162,945	$3,625,220

1 The number of households for the income groups of $50,000-69,999 and $70,000 & over was derived using a weighted average multiplied with the Census Bureaus's income range groupings in order to reconcile the different income range groupings between the Census and BLS Consumer Expenditure Survey

2 New Housing Units are gathered from Chesterfield County's Planning Department. Figures assume median income of all census 2000 block groups included in the five minute driving time area.

3 The number of commuters is derived from VDOT traffic counts of Hopkins Road between Chippenham Parkway and Monza Drive. A capture rate of 0.5% was used to determine the number of commuters who shop in the area. Income level

4 Household textiles includes towels, sheets, curtains, etc.

5 Other apparel products and services includes material, notions, and patterns used to make clothes, apparel alteration and repair, clothing rental, watches, jewelry, and watch/jewelry repair, laundry and dry cleaning services, and clothing storage.

6 Fees and Admissions includes fee for participant sports; admissions to sporting events, movies, concerts, plays, health, swimming, tennis, and country club organizations; recreational and fraternal organizations;

7 Personal care products and services include products for the hair, oral hygiene products, shaving needs, cosmetics and bath products, eletric personal care appliances, other personal care products personal care services for males and females.

Estimated Expenditures and Development Potential: Five Minute Drive Time, Shockoe Bottom Farmers' Market (Primary Area), 2010

Category										
Primary Level	**Secondary Level**	**Tertiary Level**	**Potential Expenditure (Real Total Market)(1)**	**Median Sales per Square Foot(2)**	**Number of Supportable Square Feet(3)**	**Existing Stores(4)**	**Existing Square Feet(5)**	**Unmet Demand in Square Feet(6)**	**Median GLA(7)**	**Potential New Units(8)**
Food at Home			$27,891,741.29							
	Grocery (11)		$18,129,631.84	$353.64	51,266	1	34,187	17,079	34,187	0.5
	Conveniece		$6,972,935.32	$264.60	26,353	15	30,345	-3,992	2,023	-2.0
	Specialty (Deli, Bakery, Open Air Market…)		$2,789,174.13	$189.00	14,758	3	4,950	9,808	1,650	5.9
Food away from home			$14,975,656.46							
	Sit Down Resturants		$7,487,828.23	$233.74	32,035	70	199,500	-167,465	2,850	-58.8
	Fast Food		$7,487,828.23	$248.12	30,178	18	36,270	-6,092	2,015	-3.0
Alchoholic beverages			$2,346,659.46	$254.10	9,235	3	7,200	2,035	2,400	0.8
Household Operations			$5,488,928.95							
	Personal services		$3,567,803.82	$220.31	16,194	1	1,785	14,409	1,785	8.1
	Other household expenses		$3,943,181.78							
		Laundry	$985,795.44	$47.52	20,745	2	3,838	16,907	1,919	8.8
		Dry Cleaners	$394,318.18	$130.17	3,029	2	2,900	129	1,450	0.1
Housekeeping supplies										
	Laundry and cleaning supplies(9)		$1,220,527.70							
	Other household products(9)		$2,162,727.62	$130.17	16,615	2	2,480	14,135	1,240	11.4
	Postage and stationary		$993,697.43	$211.78	4,692	1	9,433	-4,741	9,433	-0.5
Housekeeping furnishings and equipment										
	Household textiles (9)		$711,026.35	$101.93	6,976	1	11,576	-4,600	11,576	-0.4
	Furniture		$2,112,331.96	$161.44	13,084	1	4,000	9,084	4,000	2.3
	Floor coverings		$150,954.67	$75.00	2,013	1	2,556	-543	2,556	-0.2
	Major appliances		$1,147,826.82	$46.00	24,953	0	0	24,953	1,396	17.9
	Small appliances, miscellaneous housewares		$695,834.56	$97.00	7,174	0	0	7,174	1,749	4.1
	Miscellaneous household equipment		$3,840,439.27				0			
		General Hardware	$768,087.85	$180.00	4,267	0	0	4,267	8,328	0.5
		Garden/Florist	$384,043.93	$163.43	2,350	2	2,800	-450	1,400	-0.3
Apparel and services										
	Men and boys		$2,588,305.70	$220.00	11,765	3	5,457	6,308	1,819	3.5
	Women and girls		$5,482,953.53	$426.52	12,855	4	7,504	5,351	1,876	2.9
	Children under 2		$866,780.09	$115.00	7,537	0	0	7,537	1,782	4.2
	Footware		$2,789,069.80	$122.96	22,683	1	3,000	19,683	3,000	6.6
	Other Apparel Prod. & Service		$1,426,312.40							
		Alterations/Shoe Repair	$213,946.86	$32.50	6,583	1	1,020	5,563	1,020	5.5
		Jewerly/Watches	$1,212,365.54	$280.09	4,328	3	3,600	728	1,200	0.6

(1) Potential Expenditure values is equal to the Real Total Market values; both account for the year 2010

(2) Market average sales per square foot as indicated by ULI

(3) Supportable sqaure feet calculated by real market total divided by median sales per square foot

(4) Existing stores were inventoried thorugh a visual survey of the area within a five-minute drive and business liscenses were also consulted and georeferenced.

(5) Existing square feet was visually estimated for each building unit

(6) Unmet demand in square feet was calculated by subtracting existing square footage for each item from the number of supportable square feet

(7) Median Gross Leasable Area indicated by ULI

(8) Potenial new units=Unmet demand in square footage divded by median GLA

(9) Potential Expenditures for laundry and cleaning supplies were inputed into grocery(50%), Prescription and drugs (25%) and Other Household Products(25%)

Estimated Expenditures and Development Potential: Five Minute Drive Time, Shockoe Bottom Farmers' Market (Primary Area), 2010

Category

Primary Level	Secondary Level	Tertiary Level	Potential Expenditure (Real Total Market)(1)	Median Sales per Square Foot(2)	Number of Supportable Square Feet(3)	Existing Stores(4)	Existing Square Feet(5)	Unmet Demand in Square Feet(6)	Median GLA(7)	Potential New Units(8)
Transportation										
	Maintenance and repairs		$5,090,274.61							
		Auto Repairs	$3,054,164.77	$1,390.00	2,197	2	13,306	-11,109	6,653	-1.7
		Tires	$1,527,082.38	$1,390.00	1,099	2	13,306	-12,207	6,653	-1.8
		Parts	$509,027.46	$1,390.00	366	1	6,653	-6,287	6,653	-0.9
Public transportation			$2,506,849.40			1				
Health care										
	Medical services		$3,988,185.40							
		Nursing home	$598,227.81		#DIV/0!					
		Medical facility	$3,389,957.59	$390.00	8,692	5	8,875	-183	1,775	-0.1
	Presciptions & Drugs(9)		$3,602,307.47							
		Non-prescription	$1,801,153.73	$408.40	4,410	1	8,993	-4,583	8,993	-0.5
		Prescription	$1,801,153.73	$408.40	4,410	4	35,972	-31,562	8,993	-3.5
	Medical supplies		$747,072.68	$408.40	1,829	0	0	1,829	8,993	0.2
Entertainment										
	Fees and admissions		$2,528,175.54							
		Video rental	$1,264,087.77	$105.65	11,965	0	0	11,965	3,992	3.0
		Sports/Recreation	$632,043.88	$214.63	2,945	3	15,255	-12,310	5,085	-2.4
		Clubs/Community Center	$632,043.88	$105.65	5,982	8	18,880	-12,898	2,360	-5.5
	Television, radios, sound equipment		$6,854,516.88				0			
		Electronics	$4,112,710.13	$172.90	23,787	1	2,442	21,345	2,442	8.7
		Music Products	$2,741,806.75	$50.00	54,836	1	3,668	51,168	3,668	13.9
	Other Entertainment, Equipment & Services		$1,676,115.04	$108.43	15,458	2	11,846	3,612	5,923	0.6
	Pets, toys, and playground equipment		$3,716,161.28	$156.46	23,752	1	2,726	21,026	2,726	7.7
	Reading/Bookstore		$595,490.23	$156.00	3,817	2	4,892	-1,075	2,446	-0.4
Personal care products			$3,851,597.05							
	Beauty		$2,310,958.23	$138.86	16,642	14	20,034	-3,392	1,431	-2.4
	Barber		$1,155,479.11	$157.67	7,328	8	5,968	1,360	746	1.8
	Products		$385,159.70	$294.16	1,309	0	0	1,309	1,807	0.7
Education			$7,171,351.51	$207.42	34,574	1	4,800	29,774	4,800	6.2
Tobacco products and smoking supplies			$3,625,219.50	$280.00	12,947	2	2,800	10,147	1,400	7.2

(1) Potential Expenditure values is equal to the Real Total Market values; both account for the year 2010
(2) Market average sales per square foot as indicated by ULI
(3) Supportable sqaure feet calculated by real market total divided by median sales per square foot
(4) Existing stores were inventoried thorugh a visual survey of the area within a five-minute drive and business liscenses were also consulted and georeferenced.
(5) Existing square feet was visually estimated for each building unit
(6) Unmet demand in square feet was calculated by subtracting existing square footage for each item from the number of supportable square feet
(7) Median Gross Leasable Area indicated by ULI
(8) Potenial new units=Unmet demand in square footage divded by median GLA
(9) Potential Expenditures for laundry and cleaning supplies were inputed into grocery(50%), Prescription and drugs (25%) and Other Household Products(25%)

Table 13

17th Street Market UNMET DEMAND				
High Level of Unmet Demand			**Moderate Level of Unmet Demand**	
Category	**Potential New Units**		**Category**	**Potential New Units**
Major Appliances	17.9		Specialty (Deli, Bakery)	5.9
Music Products	13.9		Alterations/Shoe Repair	5.5
Other Household Products	11.4		Apparel - Children under 2	4.2
Laundry	8.8		Small appliances, miscellaneous house wares	4.1
Electronics	8.7		Apparel - Men and boys	3.5
Personal Services	8.1		Video Rental	3.0
Pets, Toys, and Playground Equip.	7.7		Apparel - Women and girls	2.9
Tobacco Products and Smoking Supplies	7.2		Furniture	2.3
Apparel - Footwear	6.6		Barber	1.8
Education	6.2		Other Entertainment, Equipment & Services	0.6
			General Hardware	0.5

The second step is the inventory of existing businesses in the Primary Study Area. This represents the current and available supply of goods and services or the total dollar amount of supply. This can be computed by multiplying the total square footage of selling space by the median sales per square feet for each type of good or service[8]. The computed total supply is $171,696,201.82. The difference between the Supply and This is converted to potential businesses or potential new units by dividing it with the average sales per square foot for every commercial activity type. This then produces the potential businesses currently underserved in the primary study area

Potential Business Opportunities

Based on the unmet demand calculated in the market analysis and the existing establishments in the 17th Street Market, some of the new supportable uses include Major Appliances, Music Products, Other Household Products, Laundry and Cleaning Supplies, Electronics, and Apparel. The table shows the number of potential new units the study area can support.

Major appliances have the largest quantitative unmet demand based on the market analysis. With the trend toward more residential development in the area, more people are going to need appliances, large and small, in the immediate area. An appliance dealer can provide support to the many surrounding neighborhoods as well. If the business selling appliances could also sell small appliances and general hardware then that would fill other needs of unmet demand, especially in the immediate Shockoe Bottom area.

Music products have the second highest quantitative unmet demand based on the market analysis. Music and entertainment was also mentioned several times in the qualitative analysis. A music or instrument store meets these unmet demands in addition to the demand for additional personal services and education if the store offers music lesson services. Guitar Works was interviewed as a potential business addition for the area but are reluctant to move due to parking issues as well as the company concentrating on online sales.

Other Household Products is the third highest quantitative unmet demand based on market analysis. With the historical context of the area in mind, an antique store or a store that sells rustic chic household items could greatly improve the nostalgia and diversity of the area. There are many existing vacancies that could accommodate the retail space required.

Electronics have a large amount of quantitative unmet demand. In the immediate Shockoe area there is no place to buy a TV, MP3 player, Cell Phone, etc… There area could benefit from a electronics store that sold smaller handheld electronics as well as repair items.

Pet care is identified as insufficient in the quantitative unmet demand. I am sure a large reason people do not move to Shockoe Bottom is because of lack of pet facilities. With so many residents in close proximity, and more moving, the area could benefit from a dog facility that provided day care, boarding, grooming and training. The training would also compliment the educational unmet demand.

Education has a high quantity of unmet demand based on the market analysis. Historical buildings and location was pointed out as a major strength to the area in the qualitative analysis. A historical tour of Shockoe Bottom and possible the surrounding areas would help fill the educational unmet demand while also providing for more family activities in the area. Tours could take place on Segways, Horse and Carriage, or Bus and run during events and/or weekends.

Apparel, including men's, women's, children's, and footwear have been identified as sufficient unmet demand based on the market analysis. A second hand consignment shop that sells apparel and footwear will fit well within the area. It works well with the unmet demand as well as the demographics of the young professionals that are filling in the residences. Other potential apparel stores could include uniform stores to accommodate the VCU medical services.

Destination Market Characteristics

Between its eclectic mix of historical landmarks, scenic river views and overall culture, Richmond, Virginia remains one of the top most frequented cities in Virginia. A study conducted by the Research Department of the U.S. Travel Association for the ***Virginia Tourism Corporation*** presents the 2011 domestic travel and economic impact in Virginia. All estimates are the product of the U.S. Travel Association's Travel Economic Impact Model (TEIM).

The Total Travel Expenditures examined includes travelers' spending on goods and services during their trips. TEIM covers 18 categories of activities. In 2011, **$588,700,000** was spent in Richmond or an overall growth of **9.3%** from 2010. This is **2.9%** of the overall travel expenditures spent throughout various destinations within the entire state. TEIM also estimated that in 2011, the City drew **$131,800,000** for payroll or a **4.3%** growth from 2010. It is 2.9% of the overall payroll distribution for travel in Virginia. In the same year, Richmond grossed about **$1,987,000** in local tax receipts, which is a **4.2%** increase from 2010. Between expenditures, payroll, employment, state and local tax receipts, the City of Richmond experienced an overall increase across the board, which indicates a rise in tourism throughout the area.

Table 14 Local area travel estimates

Expenditures ($ Millions)	Payroll ($Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($Millions)
588.7	131.8	6.22	21.51	19.87

2011 Domestic Travel Impact on Richmond (Percent Distribution)				
Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
2.9%	2.9%	3.0%	2.8%	3.6%

2011 Domestic Travel Impact on Richmond (Percent Change from 2010)				
Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
9.3%	4.3%	2.9%	4.3%	4.2%

Destination Market can be grouped in two major categories: **Heritage Tourism** (centering on the overall History and Culture of the place) and **Food Tourism** (focusing on the mix of Restaurants, Market days and Special Events and Activities with food and beverages in the spotlight).

SWOT ANALYSIS

Organization

Strengths

- George Bolos is the clear leader no matter how effective or ineffective he is.
- Special events
- Enrichmond 6y recent success with fund raising
- People want to see market succeed
- Vendor commitment

Weaknesses

- No clear benchmarking data
- Restrictions and hassles around contracts that doesn't allow for the engagement of more members
- George is spread too thin
- Operating budget too low along with restrictions on fund raising

- Venue under-utilized as a resource
- No successful brand

Opportunities

- Be relevant again
- City showing renewed commitment for improving area and market
- Enrichment foundation commitment and proximity
- Vibrant community of foodies (source of volunteers)
- Non-profit operator to help with contract restrictions
- Outdo South of the James Farmers Market

Threats

- Other, better organized, farmers markets at peak market teams compete for visitors and local vendors
- Transients/transcontinental vagrants'
- Perceived crime
- Specialty grocery stores?
- Weakness in wider economy

Economic Development

Strengths

- Historic Culture
- Close Proximity to Major Transportation Hubs (Bolt Bus, Amtrak, Bottom and Back, Future Trolley, GRTC)
- Strong Anchors: VCU, downtown, historic neighborhoods
- Low lease rates
- Unique/Adaptive/ Historical buildings
- Restaurant Cluster
- Fastest growing neighborhood in the city – Increased Residential
- Dedicated city funds for redevelopment
- There is a merchant association
- Current businesses plan to stay or expand

Weakness

- Lack of retail (not including restaurants)
- Not family friendly
- Parking
- Night oriented businesses appear vacant during the day.
- Perception of crime
- Vacancies/blight reinforce the perception of inactivity/crime
- Dilapidated buildings
- Business market relationship: vendors and business not in cooperation
- Lack of merchant association involvement
- Government stake in the area

Opportunities

- The Ballpark
- Potential for pets dog friendly
- Increase in Richmond tourism
- Large tax base and expendable income of residents
- Many categories with positive unmet demand
- Connections between market and surrounding influences
- Expanding restaurant diversity
- Create a business district that supports neighborhood residents as well as visitors from outside areas
- Business involvement in Farmers Market
- More Music
- TIF for business improvements

Threats

- The neighborhood businesses were reluctant to answer surveys and participate in merchant association
- Public still reluctant to "trust this area again"/ Perception of Crime
- Tax Rates (Property and Meal)
- Continued neglect of public areas
- Flood Insurance
- Poor city implementation and monitoring of plan for area
- Competing business districts attracting businesses and customers
- Poor economy

Promotions

Strengths

- Location
- Name Brand
    - Everyone knows where it is and what part of the city it is in
    - Established brand with locals and some tourist
    - Name has a place in Richmond history

Weaknesses

- No real signage
- Lack of existing promotion
    - Excludes Festivals
- Sometimes get a bad rep because of the area it is in
    - May deter consumers away when they hear the name
    - Name is brought up when location of crimes are trying to be explained
- When it does get publicity on the radio or television it is because it is used for parking
- A lot of the clubs in the area used its name in the form of location which could hurt its appeal with non club goers

Opportunities

- There is a chance to rebrand the market in a way that removes the negative stigmatism

- Kind of, peel away from being the "place identifier" in the area and become "the place" in the area.

- Make better use of the website and keep people informed of new vendors and events that may be taking place on market days.
- Because it has it place in Richmond history, there will always be a following from those that are interested in the historic element
  - This good for promotion because this will lead to better word of mouth promotion through those that share this common interest.
- Making better use of the local tabloids like Style Weekly and Richmond.com.
  - This would be great for because of the general direction that the market is going in (food and restaurant based), it would get notoriety with the magazine/newspaper's circulation

Threats

- Staying the same and not taping into some of the resources available
  - Not using thing such as the website to reach out to residents
- Not taking an opportunity to rebrand itself
  - Continuing to let the clubs and other bad influences in the area bring down its name.
- Continuing to not promote the vendors that come to the market
  - Could prevent new grower to choose the market and drive the other out of the market

Design

Strengths

- Historic structures and identifiable landmarks
- Existing building stock
- Mixed and diverse land uses
- Walkable grid blocks
- Access to public transportation
- Centrality and visibility of location

Weaknesses

- Vacant structures, most in poor condition; Unoccupied lots
- Concealed corners and hiding places (safety)
- Insufficient parking
- Inconsistent streetscape and overall appearance
- Lack of connectivity among points of interest (attractions, trails, transport stops)
- Lack of way-finding indicators

Opportunities

- Converging venue for events / festivals
- Face of Food or Heritage Tourism
- Infill development
- Maintenance of unoccupied properties
- Additional parking - decks with retail fronts
- Multi-modal transit hub (ex. trolley system)

Threats

- Construction of developments without regard or not blending with existing surroundings
- Demolition of prominent structures
- Government not pushing through or following up on Infrastructure projects
- Lack of funding to proceed with development
- Public not accepting or cooperating with overall neighborhood design

CONSOLIDATED SWOT ANALYSIS

Strengths

- History
- Location (proximity to transportation)
- Identity
- Commitment/Loyalty
- Restaurant Clustering
- Special events

Weaknesses

- Parking
- Perception of Crime
- Under-utilized Venue
- Constraints on contract and funding
- Lack of Comprehensive marketing (promotion)
- Vacancies

Opportunities

- Increased diversity in retail (unmet demand)
- Utilization of Venue (different kinds of events, night market, music)
- Baseball stadium
- New management (Non-Profit operators)
- Connectivity and Circulation

Threats

- Poor implementation
- Economy
- Competing districts
- Baseball Stadium
- Vendor disconnect
- Flooding