



# Site Photos



- 1 Leonardtown Square Enhancements (“The Square”)
- 2 Streetscape Enhancements (Shade Tree Easements, Lighting, Sidewalks, Crosswalks, Outdoor Dining, and/or Wayfinding Signs)
- 3 Alley Enhancements
- 4 The IceHouse at the Wharf (Waterfront Food Hall and Carousel)
- 5 Waterfront Gateway
- 6 Downtown Gateway
- 7 Potential Camalier Drive Overlook
- 8 Future Trail Connections
- 9 Potential Parking Deck
- 10 Potential Infill Mixed-Use (Oriented to Street Edges)
- 11 Potential Reorganization Of Parking Lot to Allow For Future Infill Mixed-Use if Leonardtown Volunteer Fire Department Relocates
- 12 Reorganized Parking
- 13 Fenwick Street Parking Deck (Location 1)
- 14 Potential Multi-Family/Townhouse Infill Development
- 15 Potential Hotel Expansion
- 16 Hotel and Conference Center (“The Lodge at Tudor Hall Farm”)
- 17 Amphitheater (“The Overlook”)
- 18 Shepherd’s Old Field Market Expansion
- 19 New Park with Multi-Purpose Lawn, Dog Park, Playground, Pickleball, and Walking Paths (“Fenwick Lawn”)
- 20 McIntosh Park and Greenway Trailhead
- 21 Future Tudor Hall Farm Residential Development
- 22 Potential Tudor Hall Farm Mixed-Use Development and Fenwick Street Parking Deck (Location 2)
- 23 Meadow
- 24 Gibson Market Place



**LEONARDTOWN DOWNTOWN STRATEGIC PLAN**  
Phase 3 Illustrative Plan



**Leonardtwn**  
*A most exceptional place!*



# Leonardtwn

## AN INTRODUCTION

Leonardtwn, Maryland is a richly historic community that has maintained its character and charm through thoughtful planning and curated economic development efforts. Its location in Southern Maryland offers waterfront access, proximity to Washington and Baltimore, and an excellent location near the cluster of defense resources associated with PAX Naval Air Station.

Investing in Leonardtown holds great potential for several reasons. Firstly, the town's strategic location provides easy access to major markets nearby, making it an attractive location for entrepreneurs seeking a serene and close-knit community with access to metropolitan Washington/Baltimore. Second, Leonardtown has experienced steady population growth with high median household income levels, resulting in an increased demand for housing, retail, and services. This presents a lucrative opportunity for real estate development and small business ventures. Moreover, the Town has made significant investments in infrastructure and amenities, including downtown revitalization, development of the Wharf District along the Breton Bay waterfront, abundant recreational facilities, and excellent public facilities, further enhancing its appeal for residents and potential investors alike.

Leonardtwn's commitment to preserving its historic character while embracing modern development makes it a superb place to invest in and enjoy long-term economic stability. This marketing package is designed to share some of the market opportunities in Leonardtown, plans currently underway for ongoing improvements, and a profile of the partners who are working together to keep Leonardtown a welcoming place for business.

*A Most Exceptional Place*



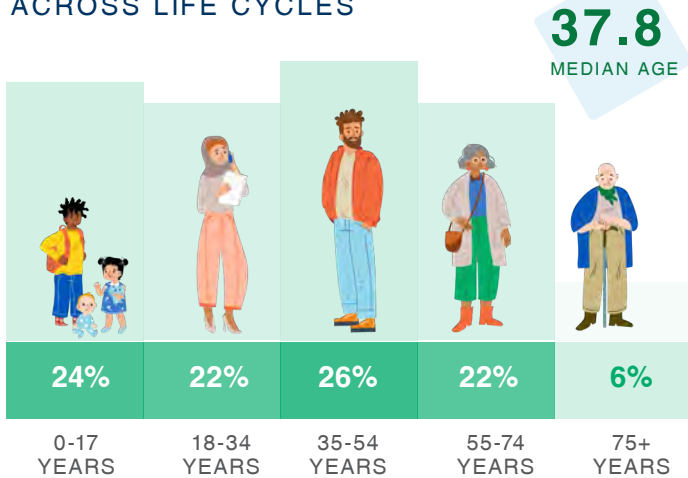


# THE MARKET Leonardtwn

Leonardtwn is a robust and growing community. Approximately 63,000 people live within a 20-minute drive of downtown Leonardtwn. This drivetime area serves as the primary market base for Leonardtwn businesses. From 2010 to 2020, the area has experienced 16% population growth, and growth is projected to continue over the next five years, adding another 2,400 people and nearly 1,000 households by the year 2028.

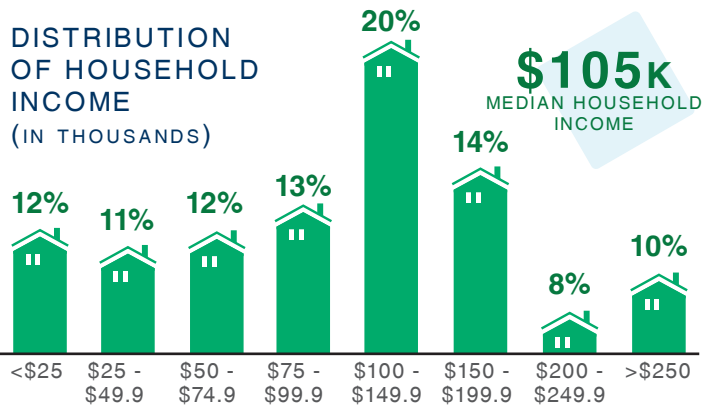
The market area serves a balanced mix of age groups, with a median age of 37.8. Approximately 71% of households in the market area are family households, and the average household size is 2.66.

## AGE DISTRIBUTION OF RESIDENTS ACROSS LIFE CYCLES



On average, residents in the market area are well-educated and have relatively high incomes. Over a third of the population age 25 years or older has at least a Bachelor's Degree and the median household income is \$105,000.

## DISTRIBUTION OF HOUSEHOLD INCOME (IN THOUSANDS)



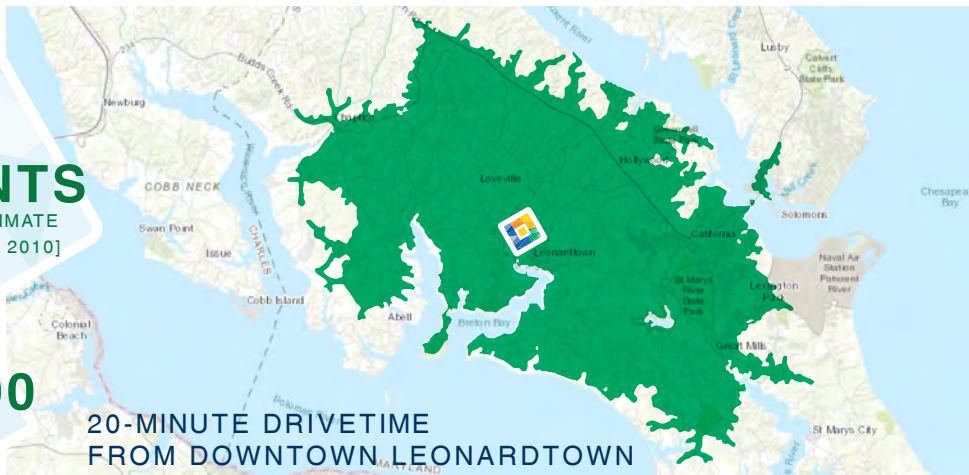
Housing is predominantly single-family detached (70%) complemented by townhomes (11%), multifamily units (16%), and mobile homes (3%). The age of the housing stock reflects the community's population growth: nearly 40% of housing was built in or after 2000. Housing is 68% owner-occupied, with a median value of owner-occupied homes of \$409,000. The February 2023 Zillow Home Value Index for the Leonardtwn 20650 ZIP code is \$452,000, an increase of 2.4% over the past year and a 23% increase since February 2020.

**63,000**  
**RESIDENTS**

2023 POPULATION ESTIMATE  
[16.6% GROWTH SINCE 2010]

**+2,400**  
BY 2028

20-MINUTE DRIVETIME  
FROM DOWNTOWN LEONARDTWN



**35%**  
HAVE A  
BACHELOR'S  
DEGREE  
OR HIGHER

**\$409k**  
MEDIAN VALUE OF  
OWNER-OCCUPIED  
HOUSING





# Leonardtwn

## Clothing & Accessories

Market  
Potential

Leonardtwn's downtown has emerged as a specialty shopping and dining destination for the region. One of the key opportunities for business expansion in the area is the clothing and accessories market. Clothing and accessories stores sell a variety of clothing, as well as shoes, jewelry, and leather goods. Existing clothing and accessories stores in the area sold \$31.1 million in goods in 2023 while local demand equaled \$50.9 million, indicating unmet demand of \$19.8 million.

Key retail opportunities include:

- > Women's clothing (\$5.4 million in retail leakage)
- > Family clothing (\$3.5 million in retail leakage)
- > Jewelry stores (\$1.2 million in retail leakage)
- > Luggage and leather goods stores (\$3.4 million in retail leakage).

The 23,000 households within a 20-minute drive of downtown are projected to grow by over 200 households per year for the next five years. Over those five years, clothing and accessories store demand is projected to grow by \$2.1 million.

Using a capture rate of both 30% of existing sales leaking to other markets and future demand growth, and sales per square foot of \$300, Leonardtwn could support an additional 21,800 square feet in clothing and accessories.



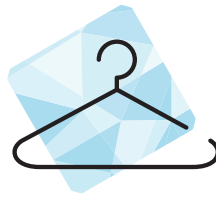
**\$50.9  
MILLION**

2023 RETAIL DEMAND FOR  
CLOTHING & ACCESSORIES



**\$31.1  
MILLION**

LOCAL SALES OF CLOTHING  
& ACCESSORIES IN 2023



**\$19.8  
MILLION**

UNMET DEMAND FOR  
CLOTHING & ACCESSORIES



**21,800  
SQUARE FEET**

ADDITIONAL POTENTIAL  
FOR CLOTHING &  
ACCESSORIES

*A Most Exceptional Place  
for Specialty Shopping*

MARKET SOURCE DATA: Claritas 2023 Spotlight Report for market data;  
Arnett Muldrow & Associates for capture rate and sales per square foot data.





# Leonardtwn

## Gifts & Antiques

Market  
Potential

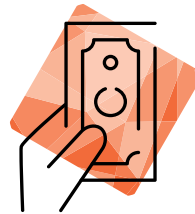
Downtown Leonardtown has emerged as the single greatest concentration of specialty shopping in southern Maryland. With dozens of shops, creative spaces for cooperative marketing, and low barriers to entry, downtown offers abundant choices to the entrepreneur interested in specialty retail.

The local market indicates strong opportunities to expand offerings in specialty retail, including gift and novelty stores, used merchandise stores, and art dealers. Existing stores in the area sold \$5.7 million in these specialty retail categories in 2023, while local demand equaled \$8 million, indicating an unmet demand of \$2.3 million. Demand in these categories is projected to grow by \$790 thousand over the next five years.

A reasonable capture scenario for these miscellaneous retail categories assumes a capture rate of 50% of both existing sales leaking to other markets and future demand growth, and sales per square foot of \$300. This scenario indicates that the community could support an additional 5,200 square feet in miscellaneous retail stores by 2028. Within this category, the largest opportunity exists for gift and novelty stores, which represent an opportunity to capture \$731 thousand in retail sales with 2,400 square feet of additional retail space.



**\$8  
MILLION**  
2023 RETAIL DEMAND  
FOR GIFTS & ANTIQUES  
SPECIALTY RETAIL



**\$5.7  
MILLION**  
LOCAL SPECIALTY RETAIL  
SALES IN 2023



**\$2.3  
MILLION**  
UNMET DEMAND FOR  
SPECIALTY RETAIL



**5,200  
SQUARE FEET**  
POTENTIAL FOR ADDITIONAL  
SPECIALTY RETAIL

*A Most Exceptional Place  
for Specialty Shopping*

MARKET SOURCE DATA: Claritas 2023 Spotlight Report for market data; Arnett Muldrow & Associates for capture rate and sales per square foot data.







# Leonardtwn

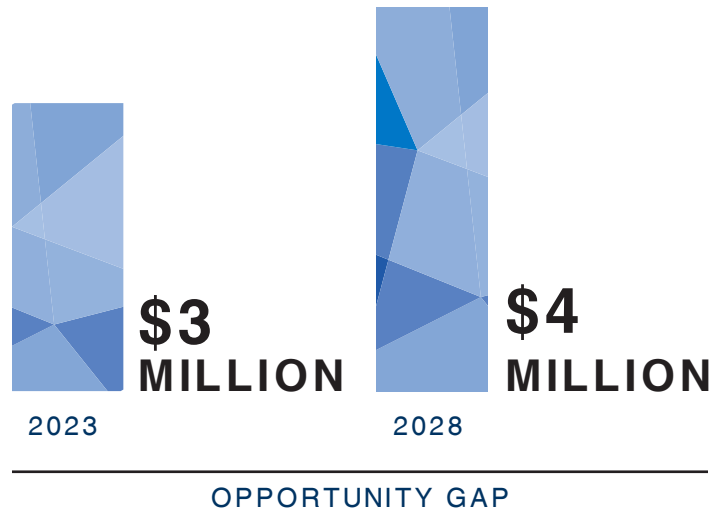
## Health & Personal Care

Market  
Potential

Health and personal care stores cover a wide array of store types, including pharmacies, skin care, men's grooming, hair care, body care, color cosmetics, bath and shower, and fragrance stores. These store types often combine with personal care services, such as day spas, salons, and barber shops.

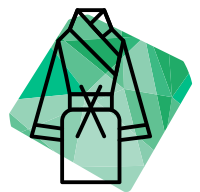
The opportunity for downtown Leonardtown excludes the demand for pharmacies and instead focuses exclusively on the highly specialized stores and services that are leaking sales within the 20-minute drive time. In this geography these health and personal care stores have sales totaling \$7.2 million while consumer demand is \$11.0 million. (The \$4.2 million sales-to-demand gap only accounts for retail sales and not for the associated services that may be part of a business model.)

Grand View Research cites personal care stores as an \$80 billion industry nationally that is forecasted to grow at a compound rate of 7.7% by 2030. Leonardtown's collection of specialty shopping is an ideal setting to capitalize on this trend with demand growth locally expected to increase by \$1.7 million by 2028.



**\$7.2  
MILLION**

2023 RETAIL DEMAND FOR  
HEALTH & PERSONAL CARE



**\$4.2  
MILLION**

LOCAL HEALTH & PERSONAL  
CARE SALES IN 2023

Using a capture rate of 50% of lost sales to other markets and sales per square foot in this store type at \$400, the community could support another 4,000 square feet of this retail type by 2028.

*A Most Exceptional  
Place for Pampering*

MARKET SOURCE DATA: Claritas 2023 Spotlight Report for market data; Arnett Muldrow & Associates for capture rate and sales per square foot data.





# Leonardtwn

## Home Furnishings

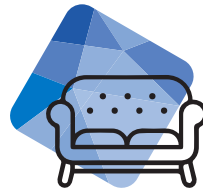
Market  
Potential

Home furnishing stores sell the “moveable items” within a home, including accessories, art, lighting, rugs, and other décor.

Existing home furnishings stores in Leonardtown sold \$6.5 million in goods in 2023, while local demand equaled \$10.5 million with a compound annual growth rate in demand of 4.5% over the next five years.

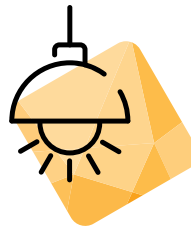
- › Leonardtown has 23,000 households within a twenty-minute drive time of Downtown.
- › The community will experience growth of over 200 households per year for the next five years.
- › Median home prices in Leonardtown itself were \$548,000 in March of 2023 an increase of \$52,000 per home over 2022 year sales.
- › The twenty-minute drivetime household income of \$105,000 per year represents a relatively affluent population.

Using a conservative capture rate of 33% of lost sales to other markets and sales per square foot in home furnishings at \$450, the community could support another 8,250 square feet by 2028.



**\$6.5  
MILLION**

2023 RETAIL DEMAND FOR  
HOME FURNISHINGS



**\$10.5  
MILLION**

LOCAL HOME FURNISHINGS  
SALES IN 2023



**\$4  
MILLION**

UNMET DEMAND FOR HOME  
FURNISHINGS



**8,250  
SQUARE FEET**

POTENTIAL FOR ADDITIONAL  
HOME FURNISHINGS RETAIL

*A Most Exceptional  
Place to Decorate*



MARKET SOURCE DATA: Claritas 2023 Spotlight Report for market data; Arnett Muldrow & Associates for capture rate and sales per square foot data.



Leonardtwn  
MARYLAND



# Leonardtwn

## Hobby, Toy, Game, & Books

Existing stores in the area sold \$4.2 million in hobby, toy, game and books in 2023 while local demand equaled \$6.5 million, indicating unmet demand of \$2.3 million in the category. Demand in the category is projected to grow by \$1.2 million over the next five years.

A reasonable capture scenario for this category assumes a capture rate of 30% of existing sales leaking to other markets, 30% capture of future demand growth, and sales per square foot of \$300. This scenario indicates that the community could support an additional 3,500 square feet in hobby, toy, game and book stores by 2028.



**\$6.5  
MILLION**

2023 DEMAND FOR HOBBY,  
TOY, GAME, & BOOK RETAIL



**\$4.2  
MILLION**

LOCAL HOBBY, TOY, GAME, &  
BOOK SALES IN 2023



**\$2.3  
MILLION**

UNMET DEMAND FOR HOBBY,  
TOY, GAME, & BOOK RETAIL



**3,500  
SQUARE FEET**

POTENTIAL FOR ADDITIONAL  
HOBBY, TOY, GAME, & BOOK  
RETAIL

*A Most Exceptional  
Place for Play*

MARKET SOURCE DATA: Claritas 2023 Spotlight Report for market data;  
Arnett Muldrow & Associates for capture rate and sales per square foot data.





# Leonardtwn

## Restaurant & Beverage

Market  
Potential

Leonardtwn is home to an exceptional collection of locally-owned restaurants that make the area a hub for dining opportunities. Downtown's walkable environment and The Leonardtwn Wharf offer opportunities for continued development of this dining cluster that will continue to build upon this strength.

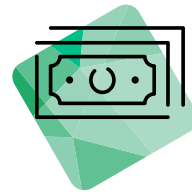
Leonardtwn has a population of over 63,000 residents within a 20-minute drive time of Downtown. This affluent area has a **2023 median household income of \$105,000**—exceeding that of Maryland by over \$12,000 per household per year. In this area, **residents spend \$131 million dining at restaurants each year.** While quick-service restaurants that cluster along Route-235 in Lexington Park and California represent a significant portion of sales in the market area, full-service dining in the same area is still under-represented, with a sales gap of \$9.2 million. By 2028 this sales gap will increase to over \$22 million.

With this high-income level, a projected growth of over 200 households per year, the strategic location in a charming historic downtown, and events that pull in visitors, Leonardtwn is well positioned to support another 55,000 square feet of dining by 2028 if it only captures 50% of the market share of growth.



**\$64.3  
MILLION**

2023 RETAIL DEMAND FOR  
FULL SERVICE DINING



**\$55.1  
MILLION**

LOCAL FULL SERVICE DINING  
SALES IN 2023



**\$9.2  
MILLION**

UNMET DEMAND FOR FULL  
SERVICE DINING



**55,000  
SQUARE FEET**

POTENTIAL FOR ADDITIONAL  
FULL SERVICE DINING

*A Most Exceptional  
Place for Dining*

MARKET SOURCE DATA: Claritas 2023 Spotlight Report for market data;  
Arnett Muldrow & Associates for capture rate and sales per square foot data.





# Leonardtwn

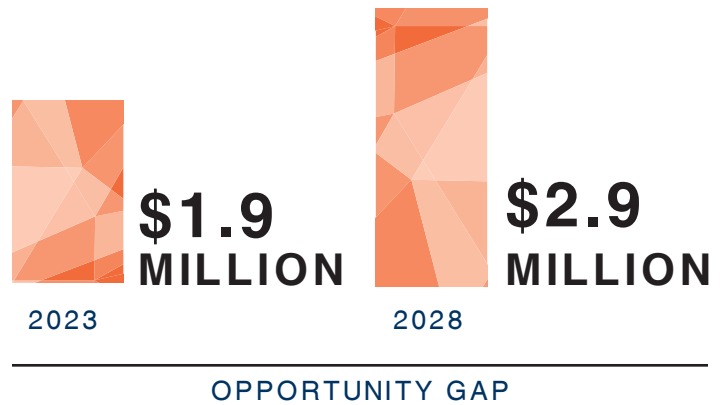
## Specialty Food Market

Market  
Potential

Specialty Food stores are enjoying a national renaissance as consumers seek out butchers, bakeries, cheese stores, pasta makers, fresh fruit and vegetables as well as hybrid cafés and food stores. Leonardtown is already home to several specialty food stores including a chocolate shop, a natural food store, and food items at Shepherd's Old Field.

This existing cluster presents opportunities for existing store expansion and new retail offerings. Within a 20-minute drivetime of downtown, consumers spend \$4.5 million in specialty food stores while sales in the same geography are \$2.6 million per year. By 2028 growth in the market demand will increase by another \$1 million which represents 4% compound growth.

Specialty food is a category that relies on discretionary spending. The median household income of the Leonardtown market is \$105,000 per year which is 15% higher than that of Maryland and 31% higher than the United States.



**\$4.5  
MILLION**

2023 DEMAND FOR  
SPECIALTY FOOD RETAIL



**\$2.6  
MILLION**

LOCAL SPECIALTY FOOD  
SALES IN 2023

Using a capture rate of 50% of lost sales to other markets and sales per square foot in specialty food at \$450, the community could support another 3,000 square feet of this retail type by 2028. This gap is likely to be conservative as specialty food clusters attract visitor traffic and can reinforce a specialty shopping destination.

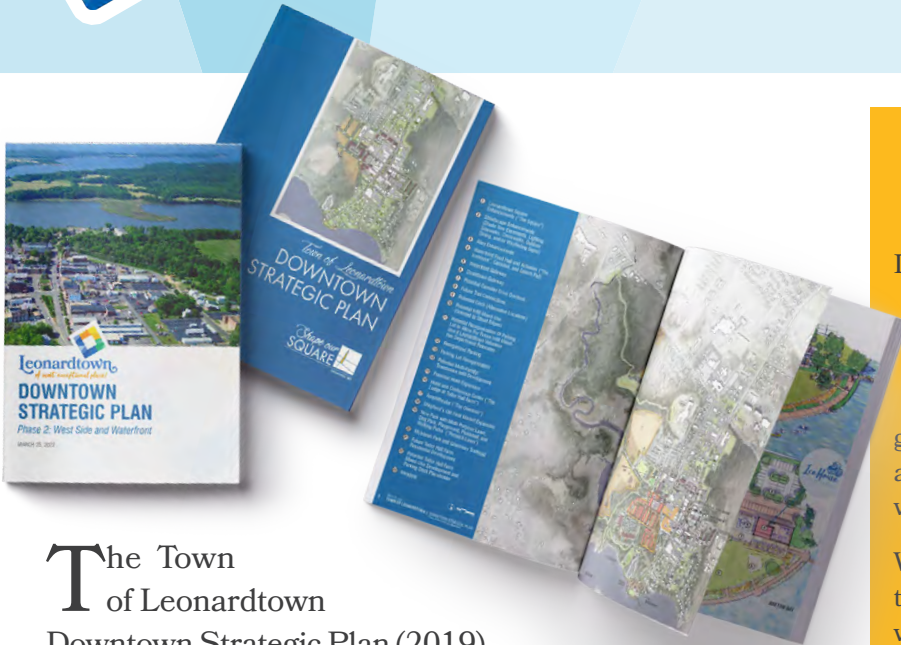
*A Most Exceptional Place  
for Gourmet Shopping*

MARKET SOURCE DATA: Claritas 2023 Spotlight Report for market data; Arnett Muldrow & Associates for capture rate and sales per square foot data.





# Leonardtwn's STRATEGIC PLANS



## The Town of Leonardtwn

Downtown Strategic Plan (2019) and the Phase II Strategic Plan (2022), being grounded in market analysis and extensive community participation, present practical solutions to guide investment (by both public and private partners), while allowing for long-term growth and improved connectivity within the community and between planned neighborhoods, existing neighborhoods, and downtown.

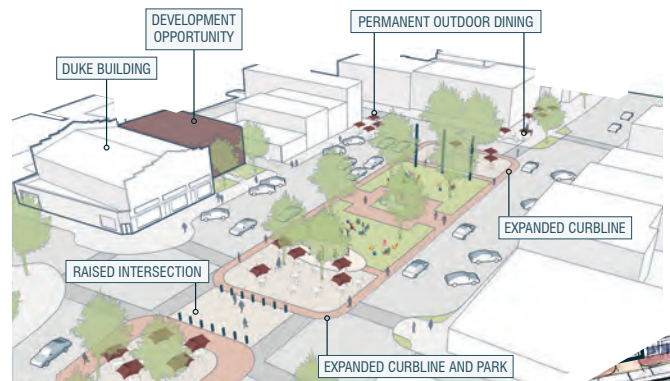
Early implementation successes—including façade improvements, public space enhancements, a new community brand, and branded wayfinding—have enabled the Town to continue building support while pursuing the longer-term vision. As a direct result of the Strategic Plan's recommendations, increased activity on The Square and within downtown has leveraged new and expanded businesses and continues to generate interest for ongoing private investment.

## A VISION FOR LEONARDTOWN

Downtown Leonardtwn is the seat of St. Mary's County, a richly historic community where the relationship between downtown and the water is part of the history and will remain significant into the future. Downtown is home to the region's greatest collection of independently-owned shops and restaurants—a place where residents can live within walking distance of our historic Square.

We endeavor to continue to foster this place as a downtown connected to the neighborhoods around us, a place where entrepreneurs can thrive in a vibrant location, where residents have lifestyle options unlike anywhere else in the county, and where the spirit of progress is represented in the charm and feel of a small town.

ORIGINALLY PUBLISHED IN THE 2019 DOWNTOWN STRATEGIC PLAN



LONG-TERM CONCEPT FOR THE SQUARE





# Leonardtwn

## Investor Resources



The Town of Leonardtown, Maryland, stands ready with our partners to help with your new or expanded business ideas. The Town of Leonardtown has professional and personal staff that actively works with businesses on a regular basis, an annual façade improvement program that provides grant funding for building improvements, and ongoing planning and investment in Downtown Leonardtown is a priority for the Mayor and Town Council.



Learn more about business resources in Leonardtown  
<https://leonardtwn.somd.com/business/index.htm>



The Leonardtown Business Association (LBA) is a member organization formed for the purpose of advancing the economic, professional, cultural, and civic welfare of Leonardtown, Maryland. The LBA encourages growth of existing businesses and offers assistance to new businesses. Services include monthly meetings, regular events and programs, branding and marketing assistance, and a comprehensive web guide to Leonardtown.



Find out more and join the LBA  
[www.visitleonardtwnmd.com/lba](http://www.visitleonardtwnmd.com/lba)



St. Mary's County Economic Development is committed to building an innovation driven economy, offering economic development services including business start-up resources, site selection, guidance navigating local permit and licensing, information on incentives and financing, workforce development, demographic and statistics resources, and partnerships and networking.



View St. Mary's County services  
[www.yesstmarysmd.com](http://www.yesstmarysmd.com)



Visit St. Mary's MD is a nonprofit organization responsible for developing and supporting travel and tourism in St. Mary's county. Visit St. Mary's serves both locals and visitors alike by highlighting local businesses, supporting regional events, and promoting St. Mary's on social media and the web.



Explore Visit St. Mary's  
[www.visitstmarysmd.com](http://www.visitstmarysmd.com)



*A Most Exceptional Place to Invest*

## Population

Leonardtown’s population has shown a consistent upward trend over the decades. In 1930, the population stood at just 697 and grew to 1,896 by the year 2000. From 2000 to 2020, the town’s population more than doubled, increasing by 140.7% over the twenty-year period. According to the Maryland Department of Planning, the estimated 2022 population for Leonardtown is 4,905.

Population			Percent Change in Population		
Year	Town of Leonardtown	St. Mary's County	Years	Town of Leonardtown	St. Mary's County
1930	697	15,819	-	-	-
1940	668	14,626	1930-1940	-4.2%	-7.5%
1950	1,017	29,111	1940-1950	52.2%	99.0%
1960	1,281	38,915	1950-1960	26.0%	33.7%
1970	1,406	47,388	1960-1970	9.8%	21.8%
1980	1,448	59,895	1970-1980	3.0%	26.4%
1990	1,475	75,974	1980-1990	1.9%	26.8%
2000	1,896	86,211	1990-2000	28.5%	13.5%
2010	2,930	105,151	2000-2010	54.5%	22.0%
2020	4,563	113,777	2010-2020	55.7%	8.2%
2022	4,905	114,877	2020-2022	7.5%	1.0%

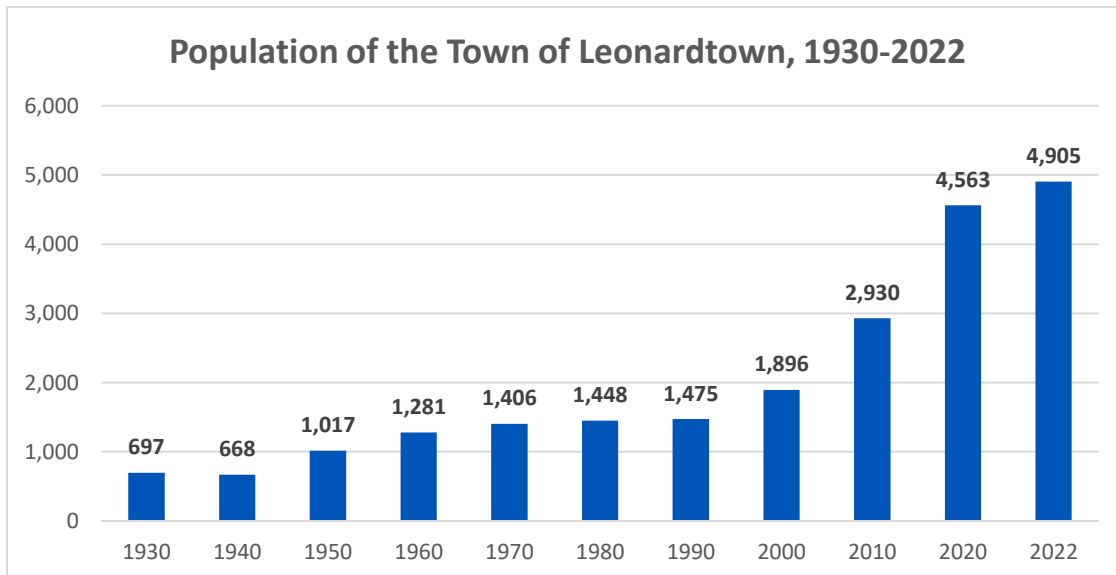
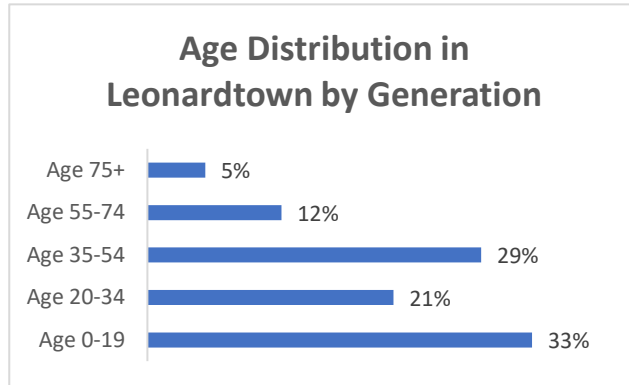


Figure 1: Population in Leonardtown and St. Mary's County, 1930-2022 (Source: US Census 1930-2020; Maryland Department of Planning 2022 Population Estimates)



## Age

Leonardtown's population trends younger relative to the county and state. The median age of Leonardtown's population is 32.3 years, lower than St. Mary's County at 36.7. Children aged 19 years and younger make up a third of the town's population and residents aged 35-54 account for 29% of the town's population.



Age	Town of Leonardtown		St. Mary's County	
	Number	Percent	Number	Percent
Total population	4,445	100.0%	113,209	100.0%
Under 5 years	304	6.8%	7,049	6.2%
5 to 9 years	336	7.6%	7,563	6.7%
10 to 14 years	514	11.6%	8,080	7.1%
15 to 19 years	324	7.3%	8,191	7.2%
20 to 24 years	405	9.1%	7,086	6.3%
25 to 29 years	189	4.3%	7,757	6.9%
30 to 34 years	351	7.9%	7,781	6.9%
35 to 39 years	261	5.9%	7,982	7.1%
40 to 44 years	474	10.7%	6,841	6.0%
45 to 49 years	218	4.9%	6,958	6.1%
50 to 54 years	328	7.4%	8,153	7.2%
55 to 59 years	188	4.2%	8,325	7.4%
60 to 64 years	94	2.1%	6,912	6.1%
65 to 69 years	151	3.4%	4,771	4.2%
70 to 74 years	84	1.9%	4,087	3.6%
75 to 79 years	44	1.0%	2,427	2.1%
80 to 84 years	68	1.5%	1,644	1.5%
85 years and over	112	2.5%	1,602	1.4%
<b>Median age (years)</b>	<b>32.3</b>		<b>36.7</b>	

Figure 2: Age Distribution of the Population in Leonardtown and St. Mary's County, 2021 (Source: 2017-2021 American Community Survey 5-Year Estimates)

## Race and Ethnicity

The racial and ethnic makeup of Leonardtown's 4,445 residents in 2021 was 69.7% White, 14% Hispanic or Latino, 6.1% Black or African American, 5.9% Asian, 1.1% Some Other Race, and 3.2% Two or More Races.

Race	Town of Leonardtown		St. Mary's County	
	Number	Percent	Number	Percent
White	3,098	69.7%	82,313	72.7%
Hispanic or Latino	621	14.0%	6186	5.5%
Black or African American	272	6.1%	15806	14.0%
Asian	262	5.9%	2825	2.5%
American Indian and Alaska Native	2	0.0%	45	0.0%
Native Hawaiian and Other Pacific Islander	0	0.0%	22	0.0%
Some Other Race	47	1.1%	390	0.3%
Two Or More Races	143	3.2%	5622	5.0%
Total Population	4,445	100.0%	113,209	100.0%

Figure 3: Race and Ethnicity in Leonardtown and St. Mary's County, 2021 (Source: 2017-2021 American Community Survey 5-Year Estimates)

## Households and Families

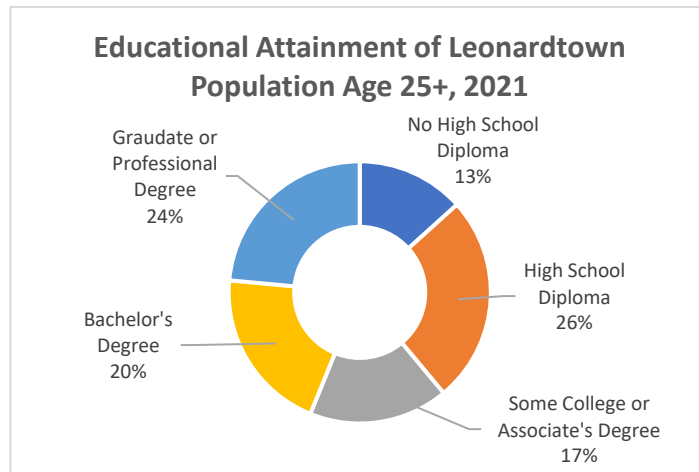
In 2021, there were 1,457 households in Leonardtown, 837 of which were family households. The average household size in Leonardtown is 2.75 people and the average family size is 3.76 people.

Households and Families		
	Town of Leonardtown	St. Mary's County
Total households	1,457	40,236
Average household size	2.75	2.75
Total family households	837	28,825
Average family size	3.76	3.25

Figure 4: Households and Families in Leonardtown and St. Mary's County, 2021 (Source: 2017-2021 American Community Survey 5-Year Estimates)

## School Enrollment & Educational Attainment

In 2021, there were 1,302 Leonardtown residents aged 3 years or older enrolled in school, 77% of which were enrolled in K-12 schools. Leonardtown has a highly educated population relative to the county. 43.8% of Leonardtown's population age 25 years or older has a Bachelor's degree or higher compared to 33% in St. Mary's County. 86.7% of Leonardtown's population age 25 years or older is a high school graduate.



School Enrollment	Town of Leonardtown		St. Mary's County	
	Number	Percent	Number	Percent
Population 3 years and over enrolled in school	1,302	100.0%	29,712	100.0%
Nursery school, preschool	88	6.8%	1,930	6.5%
Kindergarten to 12th grade	1,003	77.0%	20,260	68.2%
Kindergarten	73	5.6%	1,563	5.3%
Elementary: grade 1 to grade 4	300	23.0%	5,944	20.0%
Elementary: grade 5 to grade 8	322	24.7%	6,085	20.5%
High school: grade 9 to grade 12	308	23.7%	6,668	22.4%
College, undergraduate	102	7.8%	5,660	19.0%
Graduate, professional school	109	8.4%	1,862	6.3%
Educational Attainment	Town of Leonardtown		St. Mary's County	
	Number	Percent	Number	Percent
Population 25 years and over	2,562	100.0%	75,240	100.0%
Less than 9th grade	97	3.8%	2,138	2.8%
9th to 12th grade, no diploma	244	9.5%	4,130	5.5%
High school graduate (includes equivalency)	657	25.6%	23,515	31.3%
Some college, no degree	335	13.1%	14,709	19.5%
Associate's degree	106	4.1%	5,894	7.8%
Bachelor's degree	521	20.3%	14,303	19.0%
Graduate or professional degree	602	23.5%	10,551	14.0%
High school graduate or higher	2,221	86.7%	68,972	91.7%
Bachelor's degree or higher	1,123	43.8%	24,854	33.0%

Figure 5: School Enrollment and Educational Attainment in Leonardtown and St. Mary's County, 2021 (Source: 2017-2021 American Community Survey 5-Year Estimates)

## Income

The median household income in Leonardtown is \$126,474, higher than the median household income in St. Mary's County at \$102,859. The distribution of household incomes shows that 63% of Leonardtown households have annual incomes greater than \$100,000 while 17% have annual incomes below \$25,000.

Distribution of Household Incomes, 2021		
	Town of Leonardtown	St. Mary's County
Less than \$10,000	5.5%	3.2%
\$10,000 to \$14,999	4.5%	2.0%
\$15,000 to \$24,999	7.4%	5.2%
\$25,000 to \$34,999	7.4%	4.2%
\$35,000 to \$49,999	2.3%	7.8%
\$50,000 to \$74,999	5.4%	12.9%
\$75,000 to \$99,999	4.1%	12.6%
\$100,000 to \$149,999	28.0%	23.2%
\$150,000 to \$199,999	25.1%	14.6%
\$200,000 or more	10.3%	14.3%
Median income (dollars)	\$126,472	\$102,859
Mean income (dollars)	\$125,151	\$120,986

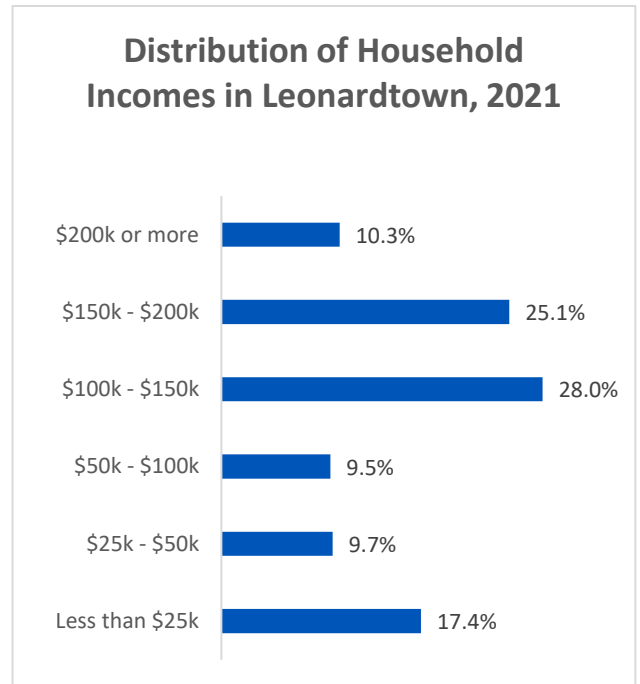


Figure 6: Distribution of Household Incomes, Median Income, and Mean Income in Leonardtown and St. Mary's County, 2021  
(Source: 2017-2021 American Community Survey 5-Year Estimates)

## Employment

In 2019, there were 5,874 jobs in Leonardtown. The healthcare and social assistance sector accounted for just over a third of the jobs in the town at 34.8%. Other large employment sectors in the town include public administration (24.9% of jobs), educational services (13.1% of jobs), retail trade (7.5% of jobs), and accommodation and food services (6.2% of jobs).

Employment by NAICS Sector	Town of Leonardtown		St. Mary's County	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing and Hunting	0	0.0%	80	0.2%
Mining, Quarrying, and Oil and Gas Extraction	0	0.0%	0	0.0%
Utilities	76	1.3%	90	0.3%
Construction	128	2.2%	2,072	6.0%
Manufacturing	50	0.9%	406	1.2%
Wholesale Trade	18	0.3%	298	0.9%
Retail Trade	441	7.5%	3,949	11.4%
Transportation and Warehousing	0	0.0%	1,865	5.4%
Information	47	0.8%	201	0.6%
Finance and Insurance	55	0.9%	503	1.5%
Real Estate and Rental and Leasing	0	0.0%	216	0.6%
Professional, Scientific, and Technical Services	189	3.2%	9,131	26.4%
Management of Companies and Enterprises	32	0.5%	164	0.5%
Administration & Support, Waste Mgmt & Remediation	36	0.6%	1,304	3.8%
Educational Services	767	13.1%	3,571	10.3%
Health Care and Social Assistance	2,046	34.8%	4,323	12.5%
Arts, Entertainment, and Recreation	23	0.4%	417	1.2%
Accommodation and Food Services	367	6.2%	3,558	10.3%
Other Services (excluding Public Administration)	138	2.3%	831	2.4%
Public Administration	1,461	24.9%	1,572	4.5%
<b>Total Jobs</b>	<b>5,874</b>		<b>34,551</b>	

Figure 7: Employment by NAICS Sector in Leonardtown and St. Mary's County, 2019 (US Census On the Map, 2019)

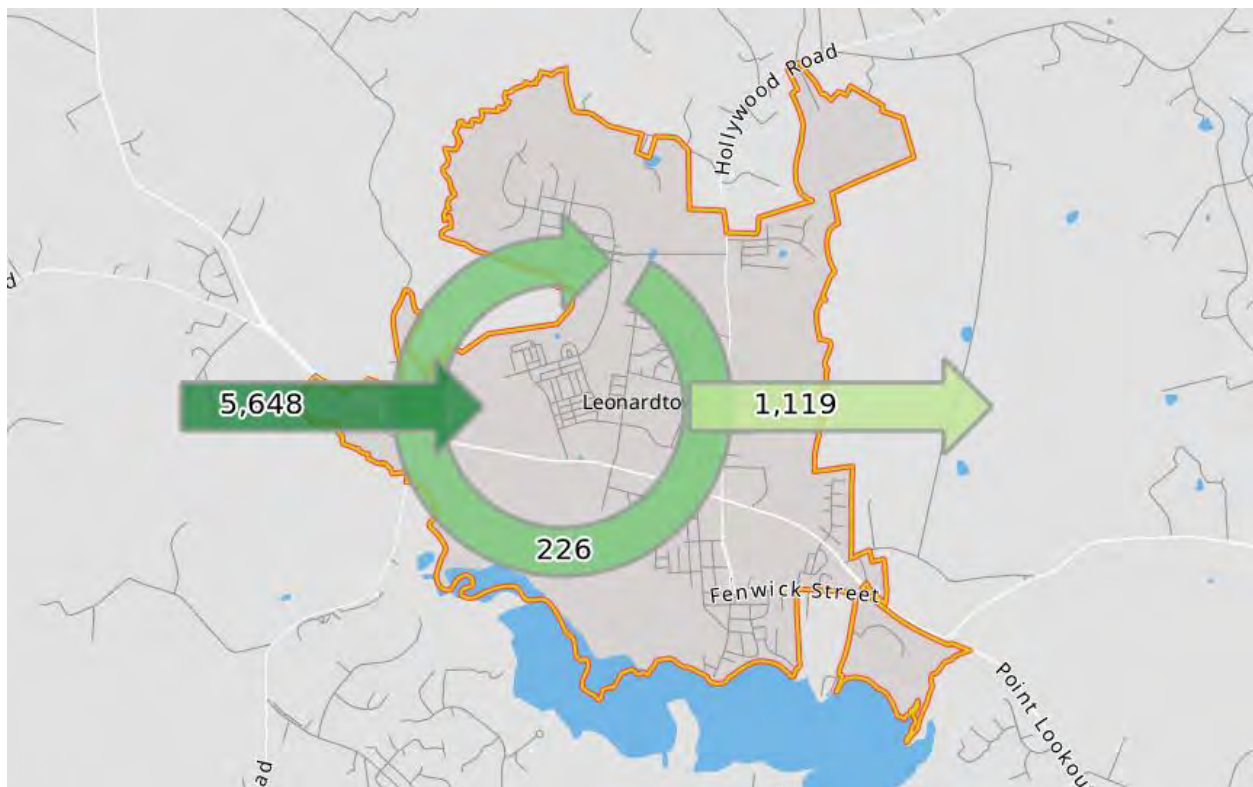
Leonardtown is a net importer of jobs, meaning that more people commute into Leonardtown for employment than the number of Leonardtown residents commuting out for employment. In 2019:

- 226 Leonardtown residents also worked in the town;
- 1,119 Leonardtown residents commuted outside of the town for employment; and
- 5,648 people from outside commuted to Leonardtown for employment.

Therefore, Leonardtown has a net inflow of 4,529 jobs.

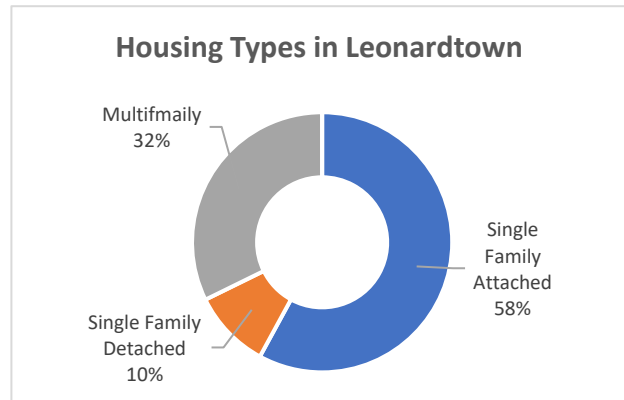
Inflow and Outflow of Jobs	Town of Leonardtown
Employed and Living in the Selection Area	1,119
Living in the Selection Area but Employed Outside	226
Employed in the Selection Area but Living Outside	5,648
Net Inflow of Jobs	4,529

Figure 8: Inflow and Outflow of Jobs in Leonardtown, 2019 (Source: US Census On the Map, 2019)



## Housing

As of 2021, there are 1,610 housing units in Leonardtown, 90.5% occupied and 9.5% vacant. 52.7% of Leonardtown’s occupied housing units are owner-occupied and 47.3% are renter-occupied. Leonardtown offers a variety of housing types: 58% are single-family attached, 9.8% are single-family detached, and 32.3% of the housing units are multifamily. The majority of the multifamily housing units are in structures with 20 or more units.



Housing Units	Town of Leonardtown		St. Mary's County	
	Number	Percent	Number	Percent
Total housing units	1,610		45,138	
Occupied housing units	1,457	90.5%	40,236	89.1%
Vacant housing units	153	9.5%	4,902	10.9%

Figure 9: Housing Units by Occupancy Status in Leonardtown and St. Mary's County, 2021 (Source: 2017-2021 American Community Survey 5-Year Estimates)

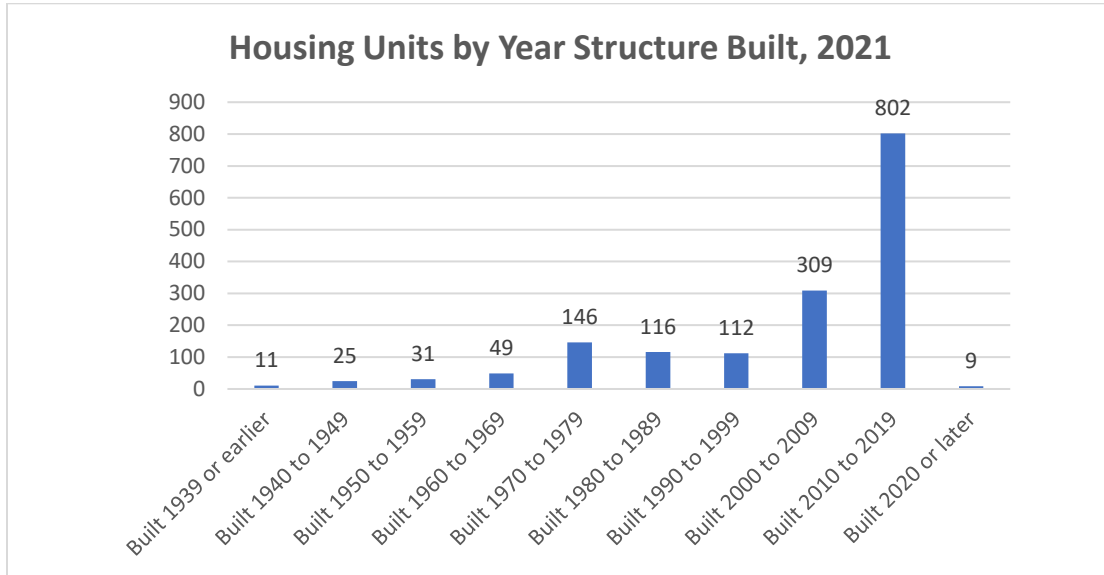
Housing Tenure	Town of Leonardtown		St. Mary's County	
	Number	Percent	Number	Percent
Owner-occupied	768	52.7%	28,846	71.7%
Renter-occupied	689	47.3%	11,390	28.3%

Figure 10: Housing Tenure in Leonardtown and St. Mary's County, 2021 (Source: 2017-2021 American Community Survey 5-Year Estimates)

Housing Types by Units in Structure	Town of Leonardtown		St. Mary's County	
	Number	Percent	Number	Percent
Total housing units	1,610		45,138	
1-unit, detached	934	58.0%	32,650	72.3%
1-unit, attached	157	9.8%	4,268	9.5%
2 units	6	0.4%	238	0.5%
3 or 4 units	19	1.2%	576	1.3%
5 to 9 units	46	2.9%	1,123	2.5%
10 to 19 units	69	4.3%	2,657	5.9%
20 or more units	379	23.5%	1,823	4.0%
Mobile home	0	0.0%	1,785	4.0%
Boat, RV, van, etc.	0	0.0%	18	0.0%

Figure 11: Housing Types in Leonardtown and St. Mary's County (Source: 2017-2021 American Community Survey 5-Year Estimates)

The age of Leonardtown’s housing stock is reflective of the population growth experienced in the first two decades of the 21<sup>st</sup> century. 69% of the town’s housing stock was built between 2000 and 2019.



Housing Units by Year Structure Built	Town of Leonardtown		St. Mary's County	
	Number	Percent	Number	Percent
Total housing units	1,610		45,138	
Built 2020 or later	9	0.6%	91	0.2%
Built 2010 to 2019	802	49.8%	5,937	13.2%
Built 2000 to 2009	309	19.2%	8,920	19.8%
Built 1990 to 1999	112	7.0%	8,605	19.1%
Built 1980 to 1989	116	7.2%	7,217	16.0%
Built 1970 to 1979	146	9.1%	6,778	15.0%
Built 1960 to 1969	49	3.0%	2,344	5.2%
Built 1950 to 1959	31	1.9%	1,890	4.2%
Built 1940 to 1949	25	1.6%	1,602	3.5%
Built 1939 or earlier	11	0.7%	1,754	3.9%

Figure 12: Housing Units by Year Structure Built in Leonardtown and St. Mary's County, 2021 (Source: 2017-2021 American Community Survey 5-Year Estimates)



The median value of owner-occupied housing in Leonardtown is \$417,700, significantly higher than the median value in St. Mary's County at \$326,800. Approximately 78% of owner-occupied housing units in the town are valued between \$300,000 and \$500,000.

Value of Owner-Occupied Units	Town of Leonardtown		St. Mary's County	
	Number	Percent	Number	Percent
Owner-occupied units	768		28,846	
Less than \$50,000	3	0.4%	1,189	4.1%
\$50,000 to \$99,999	0	0.0%	337	1.2%
\$100,000 to \$149,999	0	0.0%	1,297	4.5%
\$150,000 to \$199,999	9	1.2%	1,273	4.4%
\$200,000 to \$299,999	85	11.1%	8,307	28.8%
\$300,000 to \$499,999	598	77.9%	12,430	43.1%
\$500,000 to \$999,999	73	9.5%	3,638	12.6%
\$1,000,000 or more	0	0.0%	375	1.3%
Median (dollars)	\$417,700		\$326,800	

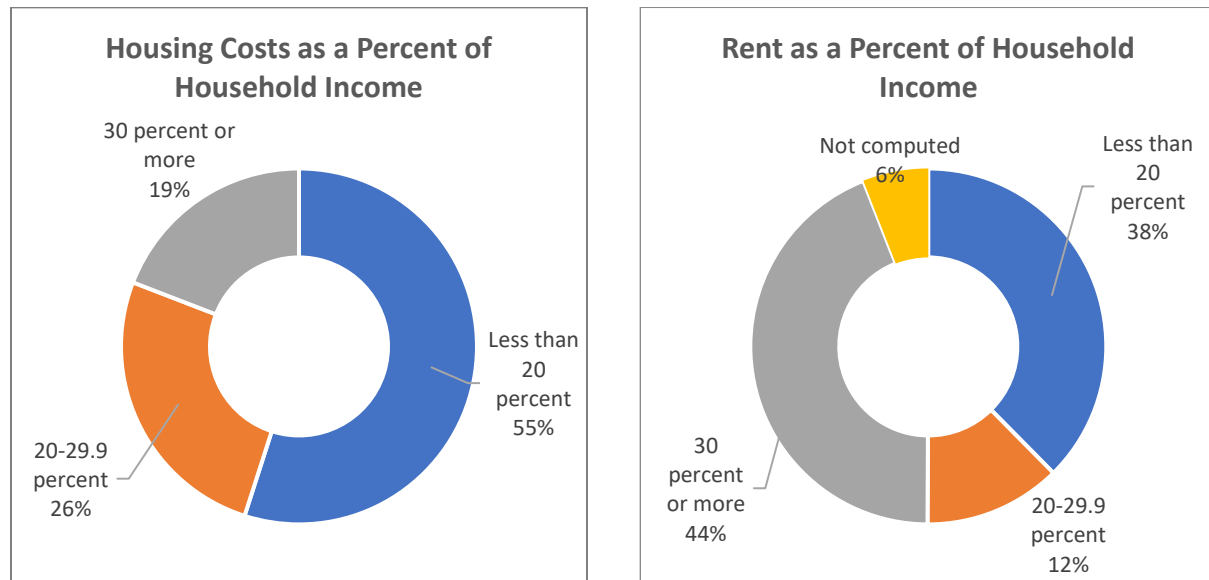
Figure 13: Value of Owner-Occupied Housing in Leonardtown and St. Mary's County (Source: 2017-2021 American Community Survey 5-Year Estimates)

Then median gross rent in Leonardtown in 2021 was \$1,283 compared to \$1,492 in St. Mary's County. Approximately 38% of Leonardtown renters pay more than \$2,000 a month in rent.

Gross Rent	Town of Leonardtown		St. Mary's County	
	Number	Percent	Number	Percent
Occupied units paying rent	648		11,028	
Less than \$500	116	17.9%	738	6.7%
\$500 to \$999	153	23.6%	1,178	10.7%
\$1,000 to \$1,499	68	10.5%	3,672	33.3%
\$1,500 to \$1,999	65	10.0%	3,852	34.9%
\$2,000 to \$2,499	156	24.1%	1,211	11.0%
\$2,500 to \$2,999	0	0.0%	231	2.1%
\$3,000 or more	90	13.9%	146	1.3%
Median (dollars)	\$1,283		\$1,492	
No rent paid	41		362	

Figure 14: Gross Rent in Leonardtown and St. Mary's County (Source: 2017-2021 American Community Survey 5-Year Estimates)

Housing affordability is a concern for Leonardtown residents, particularly for renters. 19.1% of owners and 44% of renters spend 30% or more of their household income on housing.

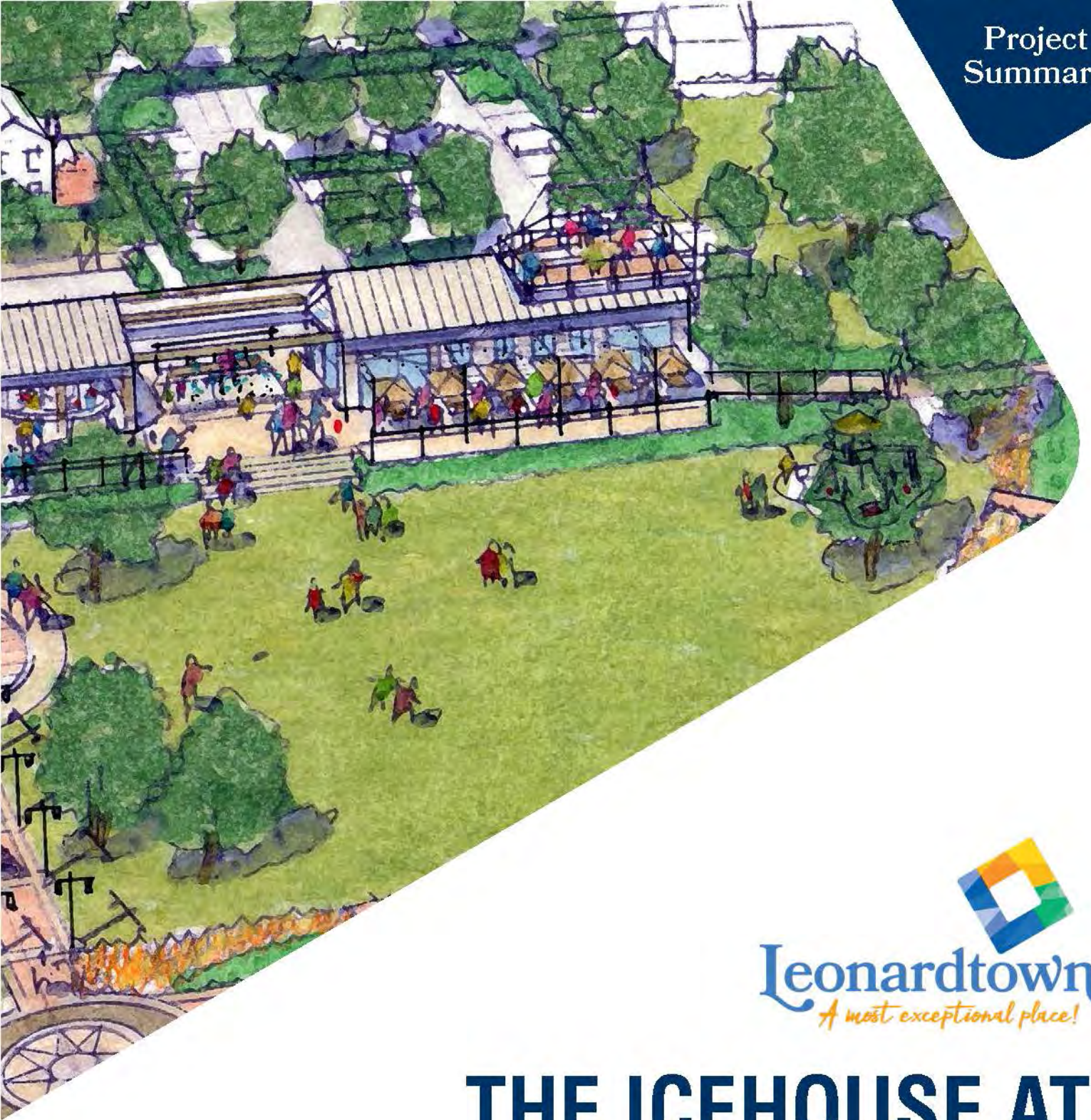


SELECTED MONTHLY OWNER COSTS AS A PERCENTAGE OF HOUSEHOLD INCOME	Town of Leonardtown		St. Mary's County	
	Number	Percent	Number	Percent
Less than 20 percent	422	54.9%	17,439	60.5%
20-29.9 percent	199	25.9%	5,867	20.3%
30 percent or more	147	19.1%	5,452	18.9%
Not computed	-	0.0%	88	0.3%
Total Owner-Occupied Units	768	100.0%	28,846	100.0%

Figure 15: Monthly Owner Costs as a Percentage of Household Income in Leonardtown and St. Mary's County, 2021 (Source: 2017-2021 American Community Survey 5-Year Estimates)

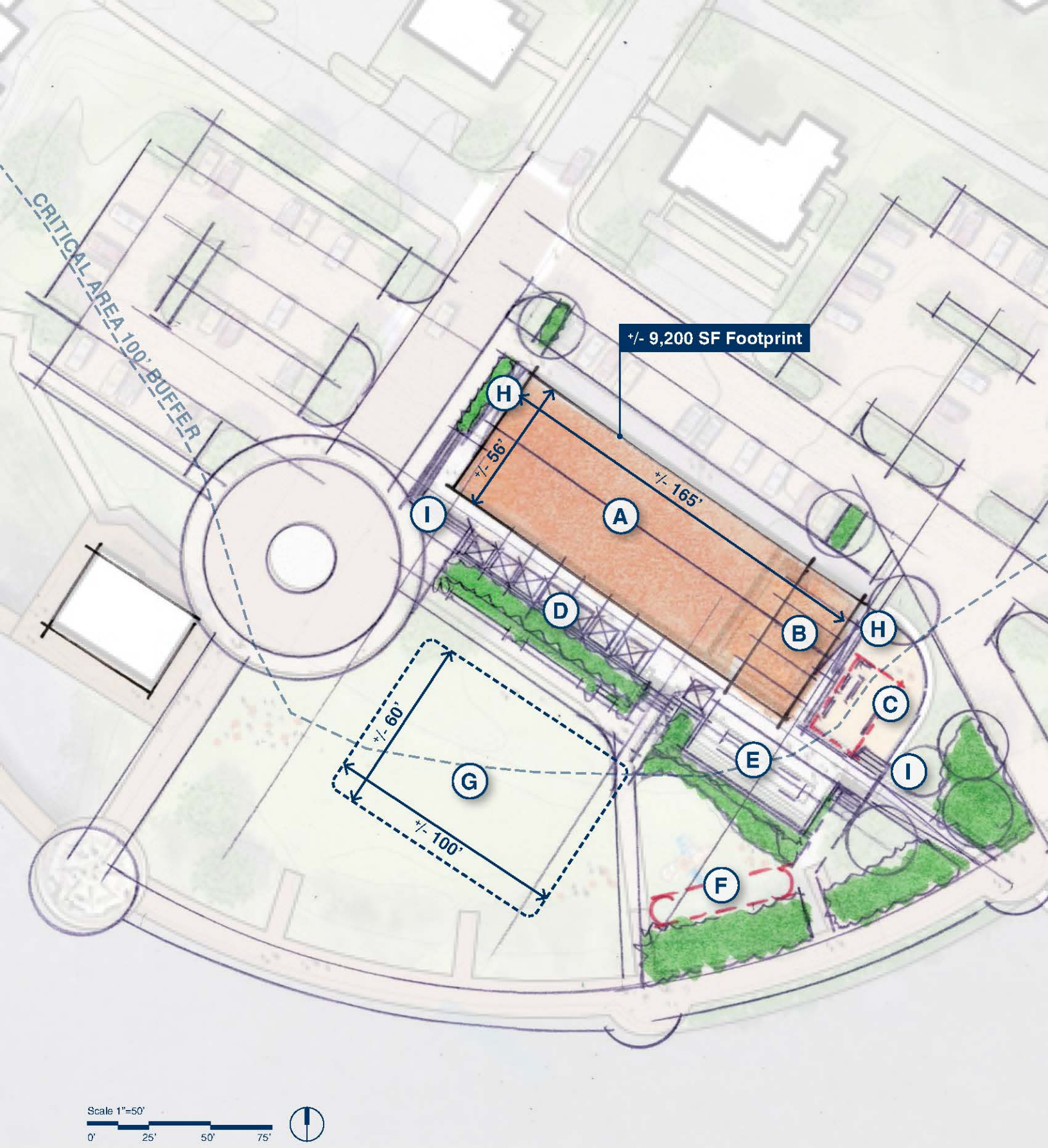
GROSS RENT AS A PERCENTAGE OF HOUSEHOLD INCOME	Town of Leonardtown		St. Mary's County	
	Number	Percent	Number	Percent
Less than 20 percent	259	37.6%	3,439	30.2%
20-29.9 percent	86	12.5%	2,992	26.3%
30 percent or more	303	44.0%	4,421	38.8%
Not computed	41	6.0%	538	4.7%
Total Owner-Occupied Units	689	100.0%	11,390	100.0%

Figure 16: Gross Rent as a Percentage of Household Income in Leonardtown and St. Mary's County, 2021 (Source: 2017-2021 American Community Survey 5-Year Estimates)



# THE ICEHOUSE AT THE WHARF

JULY 2023  
Leonardtwn Downtown Strategic Plan  
PHASE 3



# ICEHOUSE AT THE WHARF

## Option A

- A** Food Hall & Carousel
- B** Optional Roof Deck
- C** Wall Remnants—Outdoor Gathering Space
- D** Outdoor Dining Deck
- E** Splash Pad/Interactive Water Feature
- F** Existing Playground
- G** Flexible Use Lawn Area & Ice Rink Space
- H** Ramp—Grade Transition
- I** Stairs—Grade Transition



*Photo by NewOrleans.com*



*Photo from Hospitality Habits*



*Photo from St Roch Market*

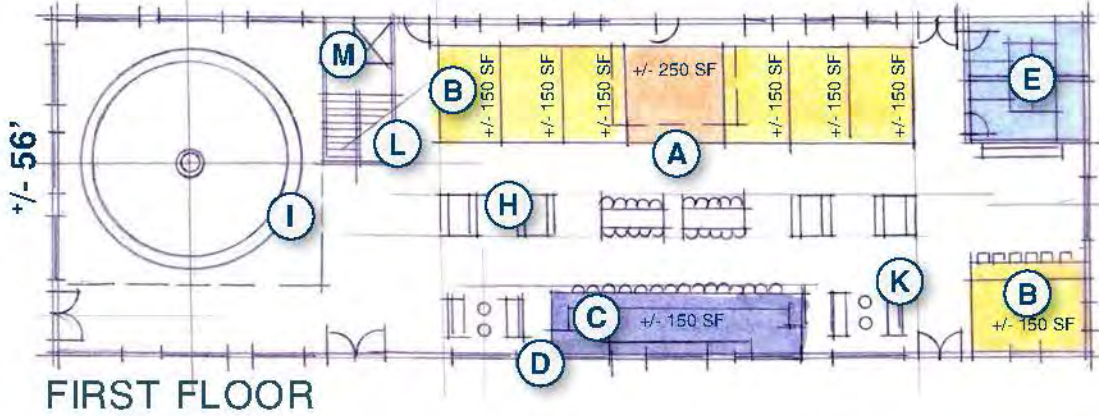


*Photo from D32 Architects*

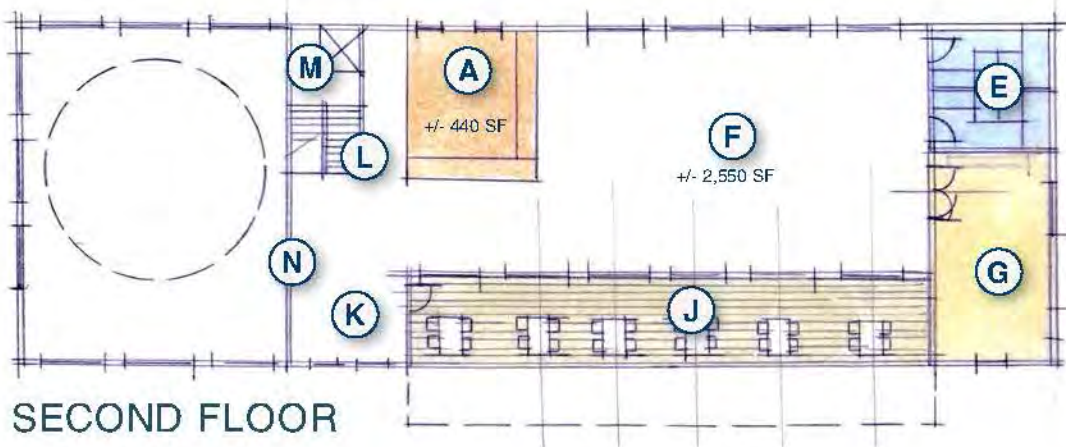


# CONCEPTUAL FLOOR PLANS

+/- 165'



FIRST FLOOR



SECOND FLOOR

- |  |  |
|--|--|
| <b>(A)</b> Shared Kitchen/Staging Area | <b>(H)</b> Indoor Tables/Seating         |
| <b>(B)</b> Tenant Spaces               | <b>(I)</b> Carousel (Ground Floor)       |
| <b>(C)</b> Indoor Bar                  | <b>(J)</b> Outdoor Covered Dining        |
| <b>(D)</b> Outdoor Bar                 | <b>(K)</b> Lounge Seating                |
| <b>(E)</b> Restrooms                   | <b>(L)</b> Stairs                        |
| <b>(F)</b> Event Space                 | <b>(M)</b> Elevator                      |
| <b>(G)</b> Storage/Flexible Use Space  | <b>(N)</b> Balcony with View to Carousel |



# ICEHOUSE AT THE WHARF

## Option A Floorplans

# PRECEDENT STUDIES

## SAINT ROCHE MARKET | New Orleans, LA



Photo from strochemarket.com



Photo from neworleans.com



Photos from eater.com

## CARTWRIGHT FOOD HALL Greer, SC

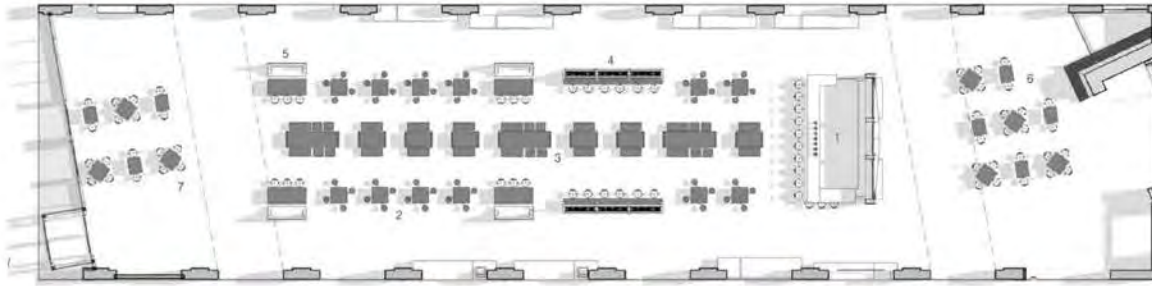


All photos from DP3Architects.com



# PRECEDENT STUDIES

## THE FORKS | Winnipeg, MB



All photos from theforks.com

## NORTH LOOP GALLEY Minneapolis, MN



All photos from hospitalitysnapshots.com





# ELEVATIONS

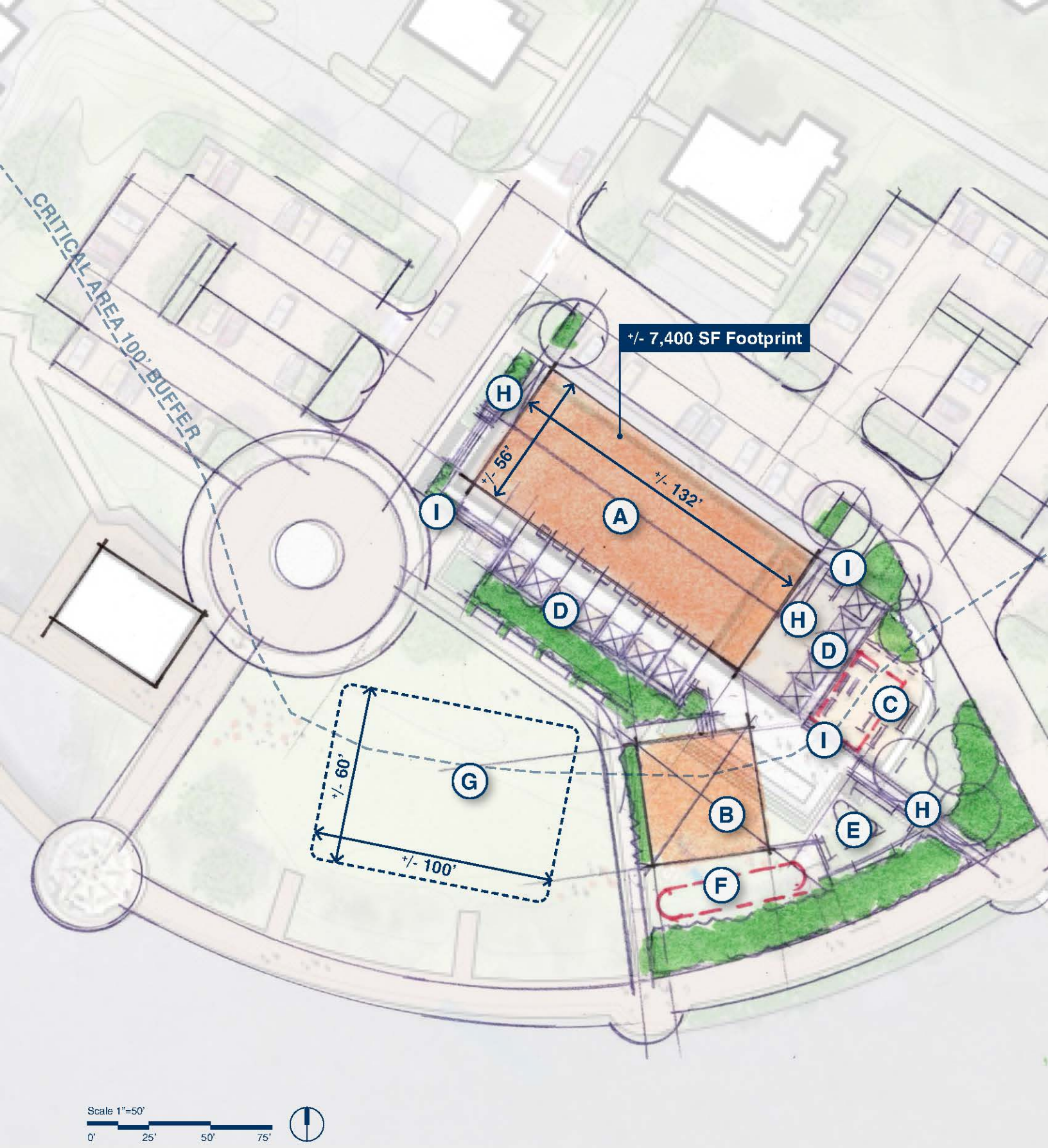


SOUTH—FACING THE WATER



WEST—FACING WASHINGTON STREET





# ICEHOUSE AT THE WHARF

## Option B1

- A** Food Hall
- B** Carousel
- C** Wall Remnants—Outdoor Gathering Space
- D** Outdoor Dining Deck
- E** Splash Pad/Interactive Water Feature
- F** Existing Playground
- G** Flexible Use Lawn Area & Ice Rink Space
- H** Ramp—Grade Transition
- I** Stairs—Grade Transition



*Photo by NewOrleans.com*



*Photo from Hospitality Hub/Robt*

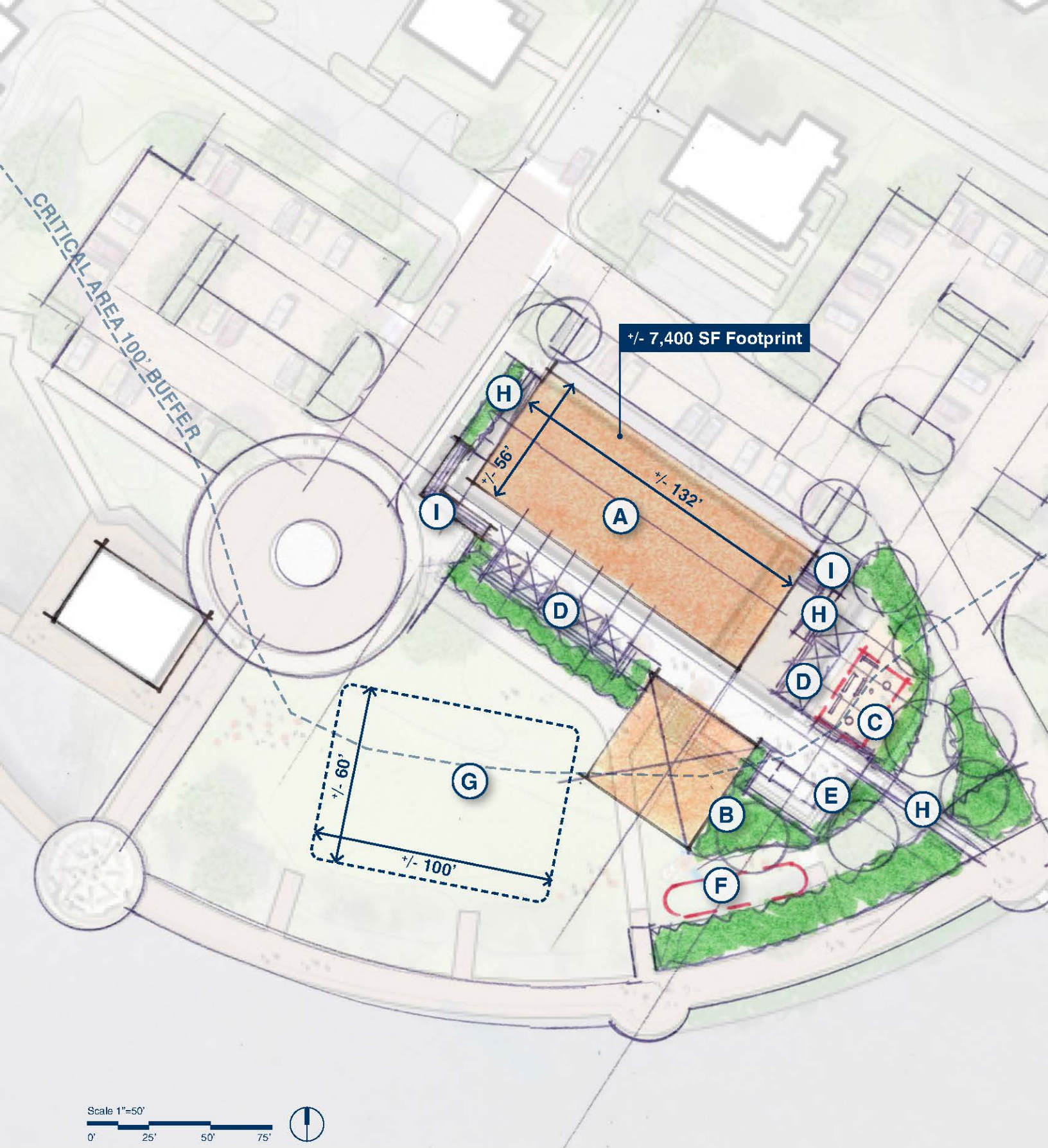


*Photo from St Roch Market*



*Photo from D32 Architects*





# ICEHOUSE AT THE WHARF

## Option B2

- A** Food Hall
- B** Carousel
- C** Wall Remnants—Outdoor Gathering Space
- D** Outdoor Dining Deck
- E** Splash Pad/Interactive Water Feature
- F** Existing Playground
- G** Flexible Use Lawn Area & Ice Rink Space
- H** Ramp—Grade Transition
- I** Stairs—Grade Transition



Photo by NewOrleans.com



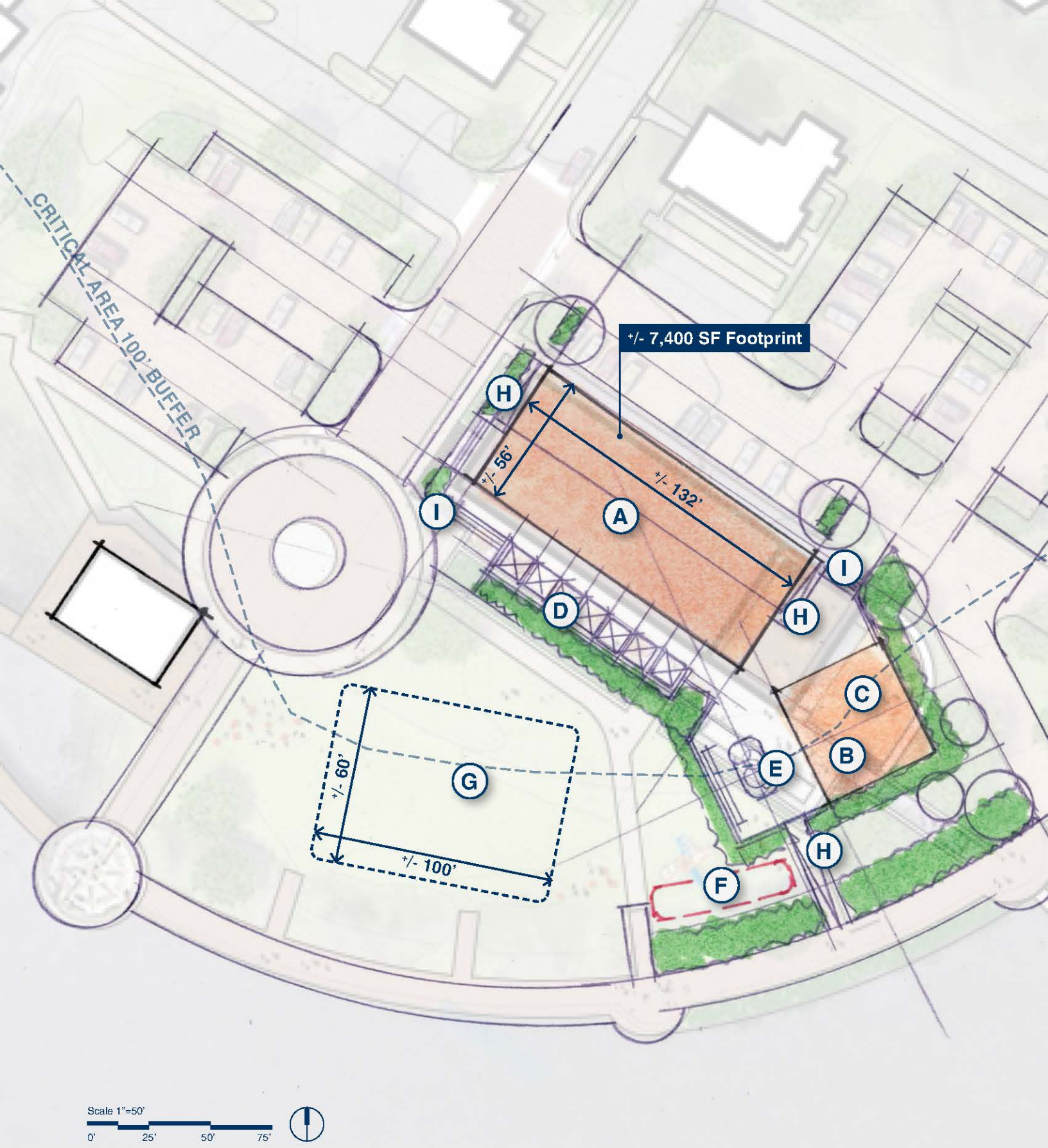
Photo from Hospitality Horizons



Photo from D33 Architects

Photo from St. Poulos Market





# ICEHOUSE AT THE WHARF

## Option B3

- A** Food Hall
- B** Carousel
- C** Remove Wall Remnants
- D** Outdoor Dining Deck
- E** Splash Pad/Interactive Water Feature
- F** Existing Playground
- G** Flexible Use Lawn Area & Ice Rink Space
- H** Ramp—Grade Transition
- I** Stairs—Grade Transition



*Photo by NewOrleans.com*



*Photo from Hospitality Hub/Robt*



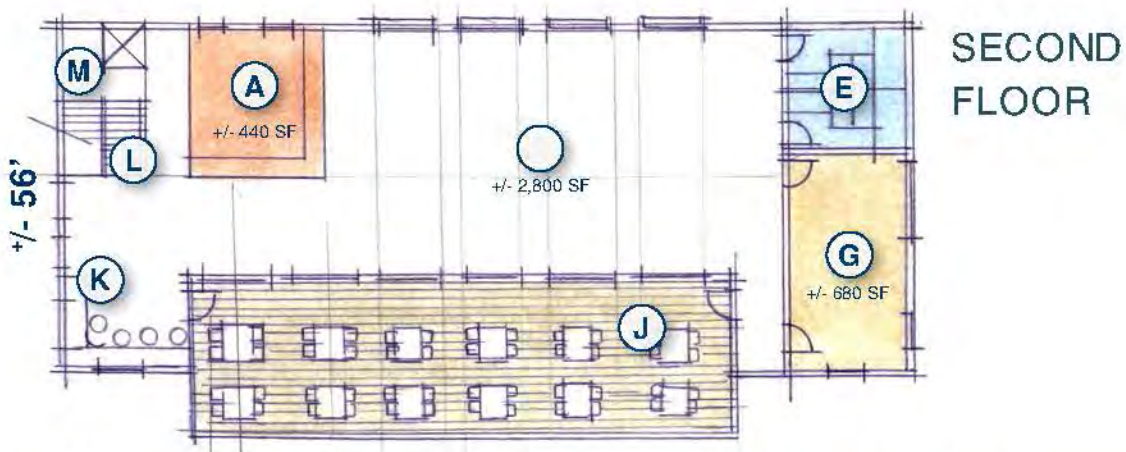
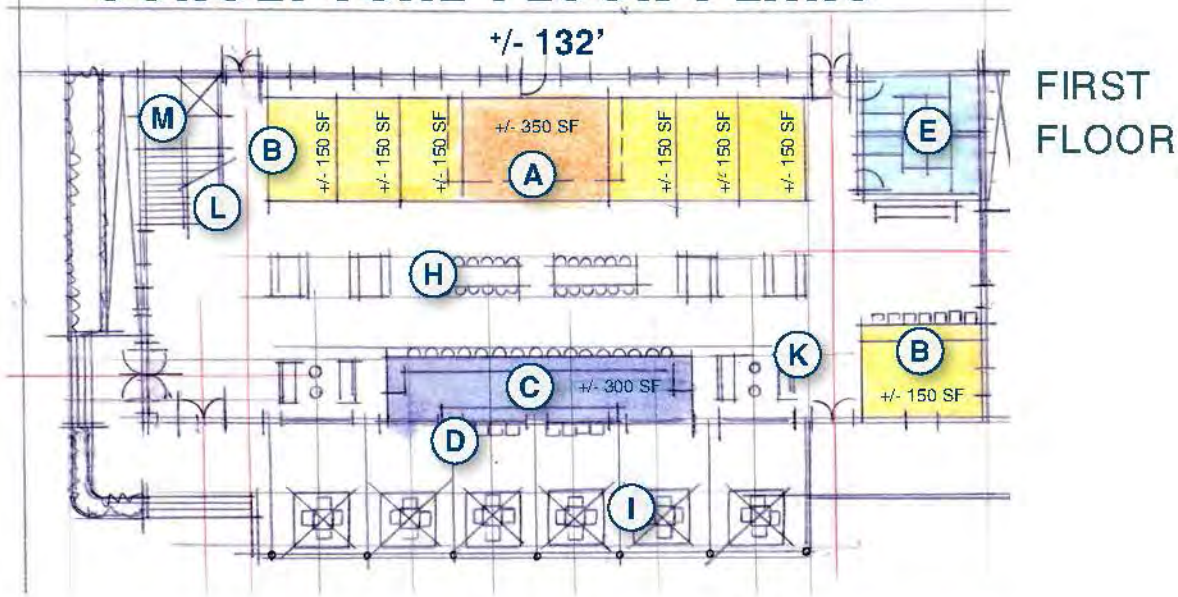
*Photo from St. Roch Market*



*Photo from D32 Architects*



# CONCEPTUAL FLOOR PLANS



- (A)** Shared Kitchen/Staging Area
- (B)** Tenant Spaces
- (C)** Indoor Bar
- (D)** Outdoor Bar
- (E)** Restrooms
- (F)** Event Space
- (G)** Storage/Flexible Use Space
- (H)** Indoor Tables/Seating
- (I)** Outdoor Seating
- (J)** Outdoor Covered Dining
- (K)** Lounge Seating
- (L)** Stairs
- (M)** Elevator



# ICEHOUSE AT THE WHARF

## Option B Floorplans





**The Town of Leonardtown, Maryland  
Request for Interest (RFI)  
Waterfront Parcel “The IceHouse”**

Please complete and return to:  
Commissioners of Leonardtown  
22670 Washington Street  
PO Box 1  
Leonardtown, MD 20650

Or send to:

[Laschelle.McKay@leonardtownmd.gov](mailto:Laschelle.McKay@leonardtownmd.gov) by January 8<sup>th</sup>, 2024

**Proposer Information:**

Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_

**Partner Information:**

Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_

