

long branch

RETAIL ANALYSIS

retail sales

Retailers in the Long Branch study area sold \$118.2 million in goods and services in 2009. With \$33.9 million in sales, *Food and Beverage* stores accounted for the largest share (29 percent) of total 2009 sales. The next two largest sources of retail sales in Long Branch were *Gasoline Stations* (23 percent) and *Building Material/Garden Equipment* stores (21 percent).

MAJOR RETAIL CATEGORIES (2009)	consumer spending	retail sales	capture rate
Total Retail Sales	\$320,021,364	\$118,147,685	37%
Building Material, Garden Equip Stores	29,458,155	25,044,078	85%
Clothing and Clothing Accessories Stores	17,318,838	4,855,616	28%
Electronics and Appliance Stores	8,302,564	806,997	10%
Food and Beverage Stores	43,575,306	33,905,122	78%
Foodservice and Drinking Places	36,255,848	9,270,328	26%
Furniture and Home Furnishings Stores	6,865,100	46,681	1%
Gasoline Stations	35,275,172	27,031,412	77%
General Merchandise Stores	45,396,756	1,203,229	3%
Health and Personal Care Stores	19,050,275	3,159,105	17%
Miscellaneous Store Retailers	7,064,246	230,362	3%
Motor Vehicle and Parts Dealers	43,736,295	12,336,844	28%
Non Store Retailers	21,124,861	0	0%
Sporting Goods, Hobby, Book, Music Stores	6,597,949	257,911	4%

consumer spending

Retail spending by Long Branch residents totaled \$320.0 million in 2009. At \$45.4 million, the top consumer spending category was *General Merchandise* (which includes department and warehouse stores), at 14 percent. *Food and Beverages* and *Motor Vehicles and Parts* categories both accounted for 13.5 percent of total spending.

retail opportunity

There is considerable leakage of potential retail sales in Long Branch. None of the major retail categories showed a surplus of sales over spending by area residents.

Two retail subcategories did show a surplus, which indicates that they attract customers from a wider market area. *Other Building Materials Dealers* (which includes suppliers such as Miles Glass) had sales of \$25 million, \$12.3 million over and above spending by area residents for these products. *Convenience Stores* had \$11 million in sales, of which \$9.2 million came from non-residents.

MAJOR RETAIL CATEGORIES (2009)	retail leakage	retail surplus
Building Material, Garden Equip Stores	4,414,077	-
Clothing and Clothing Accessories Stores	12,463,222	-
Electronics and Appliance Stores	7,495,567	-
Food and Beverage Stores	9,670,184	-
Foodservice and Drinking Places	26,985,520	-
Furniture and Home Furnishings Stores	6,818,419	-
Gasoline Stations	8,243,760	-
General Merchandise Stores	44,193,527	-
Health and Personal Care Stores	15,891,170	-
Miscellaneous Store Retailers	6,833,884	-
Motor Vehicle and Parts Dealers	31,399,451	-
Non Store Retailers	21,124,861	-
Sporting Goods, Hobby, Book, Music Stores	6,340,038	-

Retail capture rates (i.e., the ratio of local sales to spending by area residents) were highest in *Building Material/Garden Equipment*, with Long Branch stores capturing 85 percent of the \$29.5 million that residents spent in this category.

Retail capture rates were lowest in *Non-Store Retailers* (i.e., online sales), *Furniture and Home Furnishings*, *General Merchandise* and *Miscellaneous Store Retailers* (which includes office suppliers, gift shops, florists and used merchandise stores), none of which attracted more than 3 percent of spending by Long Branch residents.

retail analysis (2009)

long branch

study area: traffic zones 48, 49, 51-53

source: Claritas

DETAILED RETAIL CATEGORIES	consumer spending	retail sales	capture rate	retail gap	retail surplus
Total Retail Sales Incl Eating and Drinking Places	\$320,021,364	\$118,147,685	37%	\$201,873,679	
Appliances, TVs, Electronics Stores	6,118,872	806,997	13%	5,311,875	
Automotive Parts/Accsrs, Tire Stores	3,955,726	569,293	14%	3,386,433	
Beer, Wine and Liquor Stores	2,729,858	0	0%	2,729,858	
Book Stores and News Dealers	1,374,837	0	0%	1,374,837	
Camera and Photographic Equipment Stores	369,718	0	0%	369,718	
Childrens, Infants Clothing Stores	707,186	0	0%	707,186	
Clothing Accessories Stores	298,640	93,315	31%	205,325	
Computer and Software Stores	1,813,974	0	0%	1,813,974	
Convenience Stores	1,852,562	11,036,016	596%		9,183,454
Cosmetics, Beauty Supplies, Perfume Stores	691,495	0	0%	691,495	
Department Stores	22,665,737	1,203,229	5%	21,462,508	
Drinking Places Alcoholic Beverages	1,841,234	0	0%	1,841,234	
Family Clothing Stores	6,680,073	2,577,572	39%	4,102,501	
Florists	533,321	0	0%	533,321	
Full Service Restaurants	16,340,558	6,066,342	37%	10,274,216	
Furniture Stores	3,867,792	46,681	1%	3,821,111	
Gasoline Stations	35,275,172	27,031,412	77%	8,243,760	
Gift, Novelty and Souvenir Stores	1,404,801	146,410	10%	1,258,391	
Hardware Stores	2,333,849	0	0%	2,333,849	
Hobby, Toys and Games Stores	1,457,690	70,182	5%	1,387,508	
Home Centers	11,299,363	0	0%	11,299,363	
Home Furnishing Stores	2,997,308	0	0%	2,997,308	
Jewelry Stores	2,226,275	1,495,467	67%	730,808	
Limited Service Eating Places	15,041,966	3,203,986	21%	11,837,980	
Luggage and Leather Goods Stores	165,645	0	0%	165,645	
Men's Clothing Stores	782,119	0	0%	782,119	
Motor Vehicle Dealers-Automotive	37,365,893	11,767,551	31%	25,598,342	
Motor Vehicle Dealers-Other	2,414,676	0	0%	2,414,676	
Music Stores	683,186	0	0%	683,186	
Musical Instrument and Supplies Stores	483,208	0	0%	483,208	
Non Store/Online Retailers	21,124,861	0	0%	21,124,861	
Nursery and Garden Centers	2,090,211	0	0%	2,090,211	
Office Supplies and Stationery Stores	1,833,845	0	0%	1,833,845	
Optical Goods Stores	712,624	0	0%	712,624	
Other Building Materials Dealers	12,796,300	25,044,078	196%		12,247,778
Other Clothing Stores	826,805	0	0%	826,805	
Other General Merchandise Stores	22,731,019	0	0%	22,731,019	
Other Health and Personal Care Stores	1,224,837	0	0%	1,224,837	
Other Miscellaneous Store Retailers	2,540,630	0	0%	2,540,630	
Outdoor Power Equipment Stores	363,145	0	0%	363,145	
Paint and Wallpaper Stores	575,286	0	0%	575,286	
Pharmacies and Drug Stores	16,421,319	3,159,105	19%	13,262,214	
Sew/Needlework/Piece Goods Stores	329,481	187,729	57%	141,752	
Shoe Stores	2,485,358	689,262	28%	1,796,096	
Special Foodservices	3,032,090	0	0%	3,032,090	
Specialty Food Stores	1,181,239	262,362	22%	918,877	
Sporting Goods Stores	2,269,547	0	0%	2,269,547	
Supermarkets, Grocery Stores	37,811,648	22,606,744	60%	15,204,904	
Used Merchandise Stores	751,649	83,951	11%	667,698	
Women's Clothing Stores	3,146,737	0	0%	3,146,737	

Supportable New Retail Analysis – Long Branch 2012

The retail trade area is defined as households and retail stores within a two-mile radius of Piney Road and Garland Avenue. The retail trade area includes retail centers in Silver Spring and Langley Park as well as Long Branch. The trade area is defined as such to capture the households that are in close driving or public transportation distance to Long Branch, likewise it includes areas where current residents of Long Branch will travel to shop.

Consumer expenditure (retail demand) in the retail trade area is \$1.5 billion and sales for stores within the trade area are \$1 billion. Consumer expenditure (retail demand) is \$532 million more than the retail sales in the trade area, which indicates that households are spending their money outside of the trade area.

The potential retail opportunity is translated into square feet using a standard metric of sales per square foot by retail category. The square feet of retail by category is adjusted by 14 percent to account for non-retail use (i.e. back-offices or storage space) and by five percent for vacancies.

The retail trade area can support an additional 2.9 million square feet of retail. Because Long Branch is a small portion of the two-mile trade area, a realistic capture rate should be applied to each retail category that considers existing retail centers of Silver Spring and Langley Park and the character of Long Branch. As an example, this analysis indicates high demand for “motor vehicle and parts dealers” in the retail trade area but, given its urban character, it is unlikely a car dealership will locate in Long Branch. The proposed Purple Line Station and expected density increases in Long Branch will help the area capture a larger share of the 2.9 million supportable square feet and additional households will create more demand for retail space.

SUPPORTABLE NEW RETAIL SPACE (2012) - summary by major retail category

Long Branch retail trade area (RTA)

NOTE: The Long Branch retail trade area (RTA) is defined as households and retail stores within a 2-mile radius of Piney Branch Road and Garland Avenue.

Retail category	Retail gap in Long Branch 2-mile retail trade area			Base estimate of demand for new retail space		Adjustments to base estimate					Estimated retail space need	
	Retail demand	Retail sales	Potential retail opportunity	Typical sales per SF \1	Base estimate	Retail SF	Non-retail SF	Revised SF estimate (1)	Occupied SF	Vacant SF		Revised SF estimate (2)
Motor Vehicle and Parts Dealers	\$257,706,997	\$16,141,008	\$241,565,989	\$278	868,358	868,358	121,570	989,928	989,928	49,496	1,039,425	1,039,425
Furniture and Home Furnishings Stores	\$36,251,724	\$15,538,134	\$20,713,590	\$225	92,192	92,192	12,907	105,098	105,098	5,255	110,353	110,353
Electronics and Appliance Stores	\$39,982,578	\$30,730,973	\$9,251,605	\$357	25,909	25,909	3,627	29,536	29,536	1,477	31,013	31,013
Building Material, Garden Equip Stores	\$147,931,274	\$77,837,153	\$70,094,121	\$285	245,687	245,687	34,396	280,083	280,083	14,004	294,087	294,087
Food and Beverage Stores	\$218,015,828	\$311,033,863	(\$93,018,035)	\$408	(228,245)	(228,245)	(31,954)	(260,199)	(260,199)	(13,010)	(273,209)	(273,209)
Health and Personal Care Stores	\$104,714,647	\$81,933,906	\$22,780,741	\$422	53,964	53,964	7,555	61,518	61,518	3,076	64,594	64,594
Gasoline Stations	\$151,853,809	\$115,940,103	\$35,913,706	\$3,246	11,063	11,063	1,549	12,612	12,612	631	13,243	13,243
Clothing and Clothing Accessories Stores	\$92,501,631	\$82,862,661	\$9,638,970	\$322	29,976	29,976	4,197	34,172	34,172	1,709	35,881	35,881
Sporting Goods, Hobby, Book, Music Stores	\$35,250,259	\$20,417,284	\$14,832,975	\$253	58,650	58,650	8,211	66,861	66,861	3,343	70,204	70,204
General Merchandise Stores	\$235,790,057	\$36,340,311	\$199,449,746	\$159	1,250,788	1,250,788	175,110	1,425,898	1,425,898	71,295	1,497,193	1,497,193
Miscellaneous Store Retailers	\$41,984,631	\$29,885,424	\$12,099,207	\$275	44,016	44,016	6,162	50,179	50,179	2,509	52,688	52,688
Foodservice and Drinking Places	\$187,221,502	\$198,255,189	(\$11,033,687)	\$306	(36,014)	(36,014)	(5,042)	(41,056)	(41,056)	(2,053)	(43,109)	(43,109)
ALL RETAIL STORE CATEGORIES	\$1,549,204,937	\$1,016,916,009	\$532,288,928		2,416,343	2,416,343	338,288	2,754,632	2,754,632	137,732	2,892,363	2,892,363

\1 Based on CRIS analysis of data from Urban Land Institute's Dollars and Cents of Shopping Centers ; adjusted to 2012 dollars.
Source: Tabulated by the Center for Research & Information Systems, November 2012.