

College Park Business Inventory & Analysis for 2011

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Background Information:

- The initial data used to conduct this analysis is from the City of College Park's Public Services Department. The department provided a list of all businesses with current permits, which they supplemented by conducting a field study to find any businesses operating without a license.
- The permit data was generated through a report run on December 5, 2011.
- The Department of Planning, Community, and Economic Development edited the list by checking for duplicate businesses, as well as calling an assortment of businesses to verify their status.
- The Department of Planning, Community, and Economic Development created a map of the various business districts, located on Page 4, to help analyze the business inventory in different parts of the city.
- The University of Maryland business district is a general label and includes property owned by parties other than the University.
- Each business was given a label for their business sector and ownership structure, which are defined below.

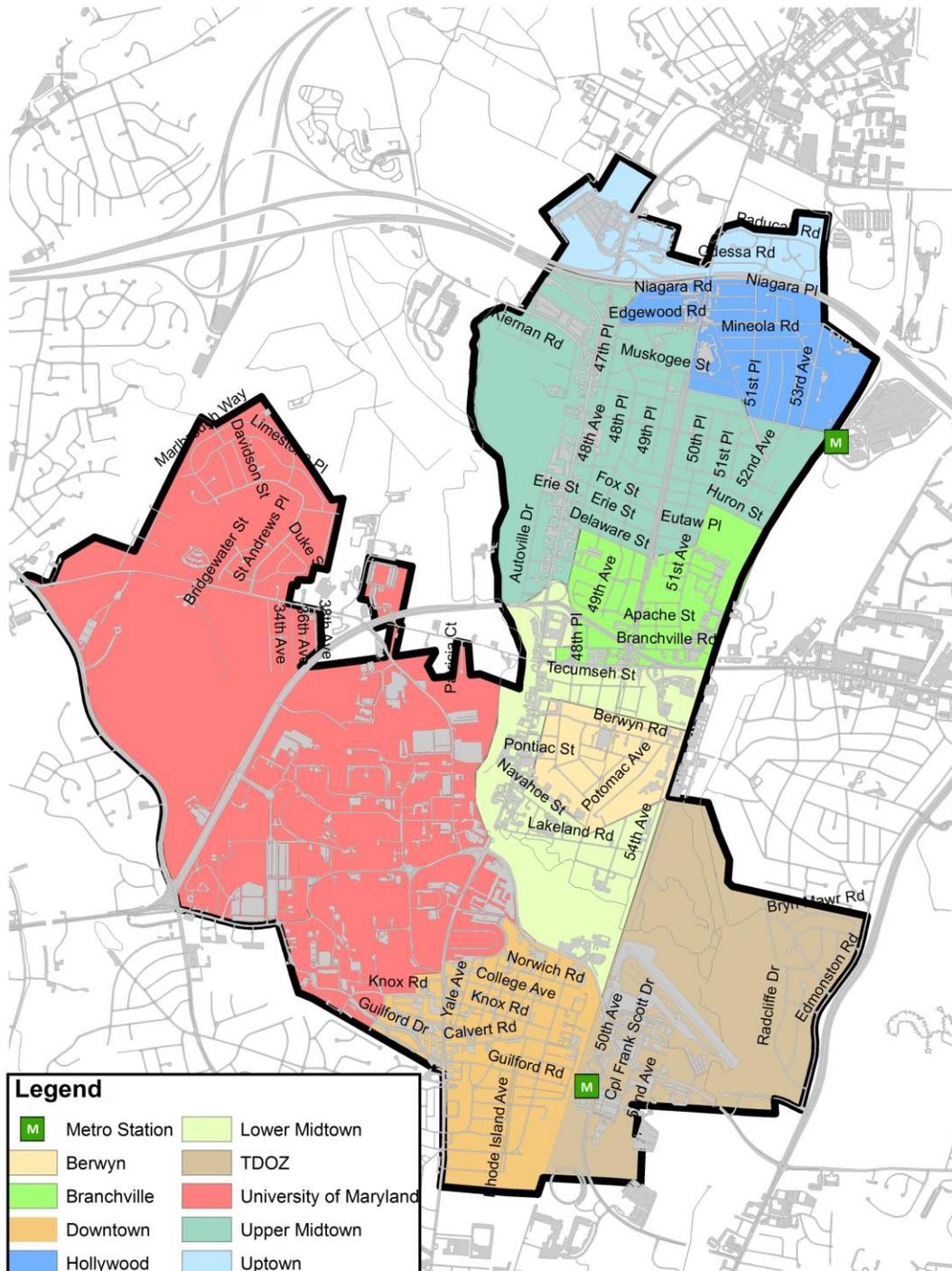
Business Sector Methodology:

- "Automotive" includes all businesses that relate to automotive repair and maintenance, as well as new and used car dealerships.
- "Bank" includes all banking branches and ATM business locations.
- "Cleaner" include all dry cleaning and laundry facilities.
- "Entertainment" includes recreational facilities, such as the bowling alley or tennis center.
- "Food Take-Out" includes food providers that are predominately take-out, carryout, or fast food with an in-store dining option.
- "Food Sit-Down" includes food providers that are predominately sit-down style dining.
- "Grocery/Convenience" includes all grocery, convenience, and beverage/liquor stores.
- "Light Industrial/Warehouse" includes several small scale manufacturing businesses such as cabinetry, window framing, and towing.
- "Office" includes businesses without a storefront presence, which include, but are not limited to, medical, insurance, law, engineering, architecture, computer, and accounting firms.
- "Retail" includes all ground level retail stores.
- "Salon" includes all beauty, nail, tanning, and hair salons.
- "Services" includes ground-level retail services such as printing and mailing supplies, tattoo parlors, pharmacies, etc.
- "Other/Undefined" includes miscellaneous uses such as daycare providers, public/university property, city government property, veterans' organizations (American Legion and VFM), etc.

Ownership Structure Methodology:

- "Local or Unique" includes businesses whose primary or sole business location resides in College Park. This includes businesses that we believe are privately held and the owner, or the majority of the owners, are DC, Maryland, or Virginia residents and live within 50 miles of College Park at least half of the year. This includes employee- and cooperatively-owned businesses, as well as nonprofits, but not government units.
- "Regional" includes businesses with additional locations inside the Baltimore-Washington or Mid-Atlantic region only.
- "National Franchise" includes businesses with a national presence owned by an outside investor.
- "National Chain" includes businesses with a national presence owned by the parent corporation.
- "Other/Undefined" includes businesses that have unclear ownership structure and/or have a potential presence at the national level. This category includes businesses related to the University of Maryland.

City of College Park Business Districts - January 2012



Business District Comparison

For this analysis there are a total of nine business districts in the City of College Park. Table 1 below summarizes the total number of businesses in the city by their business sector and district. Overall, there are approximately 491 active businesses in the City of College Park with the largest sector being Office, which has 129 businesses. Food Take-Out and Retail are next with 75 and 45 businesses, respectively. The majority of businesses are located in the Downtown, Hollywood, and Upper Midtown districts, as they contain 56.9% of all businesses.

Business Sector \ Business District	Berwyn	Branchville	Downtown	Hollywood	Lower Midtown	TDOZ	UMD	Upper Midtown	Uptown	Total	Percentage of Business Total
Automotive	4	10	0	5	5	6	0	11	0	41	8.4%
Bank	0	0	3	0	0	0	2	2	2	9	1.8%
Cleaner	0	0	3	1	0	0	0	0	1	5	1.0%
Entertainment	1	0	0	1	1	1	0	0	0	4	0.8%
Food: Take-Out	1	1	22	3	11	0	28	6	3	75	15.3%
Food: Sit-Down	1	0	9	1	10	0	4	6	3	34	6.9%
Gas Station	0	0	1	0	2	0	0	1	0	4	0.8%
Grocery/Convenience	0	3	3	5	6	0	5	1	0	23	4.7%
Hospitality	0	1	1	0	2	0	1	6	1	12	2.4%
Light Ind. Warehouse	11	23	0	0	0	10	0	0	0	44	9.0%
Office	7	12	45	40	3	1	0	20	1	129	26.3%
Retail	3	0	13	10	2	1	2	12	2	45	9.2%
Salon	1	2	7	6	3	0	0	6	3	28	5.7%
Services	1	2	6	1	2	1	0	11	2	26	5.3%
Other/Undefined	2	2	1	4	0	0	0	3	0	12	2.4%
Total	32	56	114	77	47	20	42	85	18	491	
District Percentage of Total Businesses	6.5%	11.4%	23.2%	15.7%	9.6%	4.1%	8.6%	17.3%	3.7%		

Table 1: Comparing Business Districts through Business Sectors

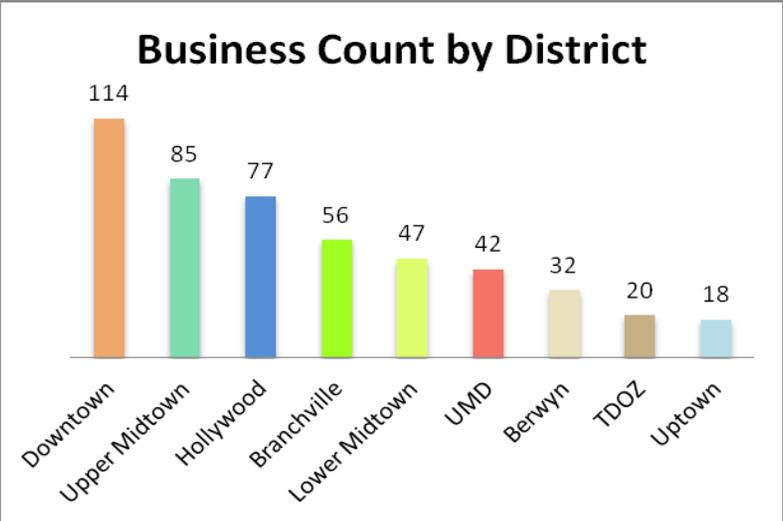
Table 2 summarizes the number of businesses in College Park by their ownership structure and business district. The criteria for the different ownership structures such as local/unique, regional, and national level businesses can be found in the Background Information and Methodology section on Page 3.

According to our assessment, over 300 businesses are local or unique to the City of College Park, which accounts for 62.1% of all of businesses located in the city. The majority of these businesses are located in Downtown, Upper Midtown, Hollywood, and Branchville as those districts contain 75.4% of all local businesses. In addition to local businesses, there is also a substantial presence from national chains and franchises, which are primarily found on the Route 1 corridor and the University of Maryland campus.

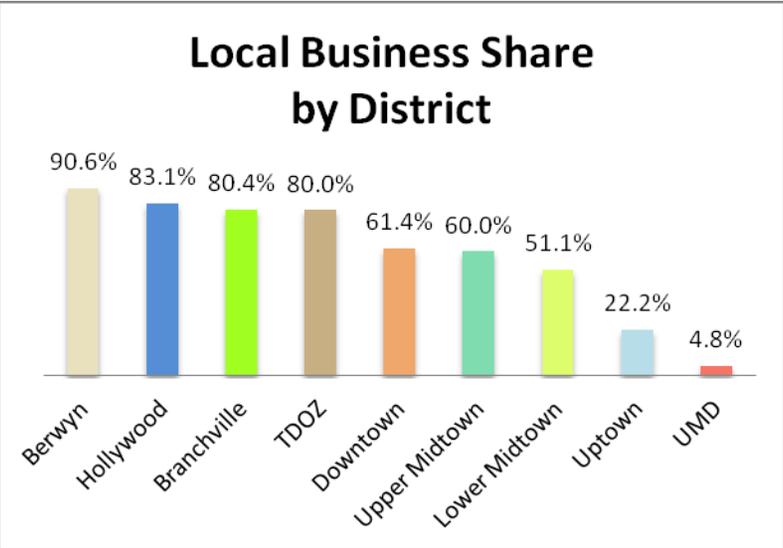
Business District Ownership Structure	Berwyn	Branchville	Downtown	Hollywood	Lower Midtown	TDOZ	UMD	Upper Midtown	Uptown	Total	Ownership Structure Percentage of Total Businesses
Local or Unique	29	45	70	64	24	16	2	51	4	305	62.1%
Regional	1	2	5	3	3	0	0	10	0	24	4.9%
National Franchise	0	5	9	6	8	1	2	11	5	47	9.6%
National Chain	2	3	27	2	12	1	12	11	8	77	15.7%
Other	0	1	3	2	1	2	26	2	1	38	7.7%
Total	32	56	114	77	47	20	42	85	18	491	
District Percentage of Total Businesses	6.5%	11.4%	23.2%	15.7%	9.6%	4.1%	8.6%	17.3%	3.7%		

Table 2: Comparing Business Districts through Ownership Structures

In addition to the preceding tables, the following graphs further illustrate some facts about these business districts. Graph 1 displays the total number of businesses by district as Downtown leads the way with 114 businesses, while Uptown has the lowest number with 18 businesses. Graph 2 displays the share of local businesses in each of the nine business districts with Berwyn having the largest share at 90.6%, while Uptown and UMD feature the lowest percentage of local businesses at 22.2% and 4.8%, respectively.



Graph 1



Graph 2

Business Sector & Ownership Structure Analysis

For this analysis there are a total of sixteen business sectors and five ownership structures, all of which are defined in the Background Information and Methodology section on Page 3.

Table 3 below summarizes the ownership structure of College Park businesses by business sector. The table can be used to identify the percentage of each business sector with a certain ownership structure. For example, there are a total of 41 automotive-related businesses in College Park, with 32, or 78%, of those being local or unique businesses.

Business Sector \ Ownership Structure	Local or Unique	Local or Unique Percentage of Sector	Regional	Regional Percentage of Sector	National Franchise	National Franchise Percentage Of Sector	National Chain	National Chain Percentage of Sector	Other	Other Percentage of Sector	Total
Automotive	32	78.0%	5	12.2%	1	2.4%	3	7.3%	-	-	41
Bank	-	-	2	22.2%	-	-	7	77.8%	-	-	9
Cleaner	4	80.0%	-	-	1	20.0%	-	-	-	-	5
Entertainment	1	25.0%	1	25.0%	-	-	1	25.0%	1	25.0%	4
Food: Take-Out	23	30.7%	-	-	8	10.7%	28	37.3%	16	21.3%	75
Food: Sit-Down	16	47.1%	4	11.8%	2	5.9%	7	20.6%	5	14.7%	34
Gas Station	-	-	-	-	4	100.0%	-	-	-	-	4
Grocery/Convenience	9	39.1%	1	4.3%	5	21.7%	3	13.0%	5	21.7%	23
Hospitality	-	-	-	-	11	91.7%	1	8.3%	-	-	12
Light Ind. Warehouse	39	88.6%	1	2.3%	1	2.3%	3	6.8%	-	-	44
Office	103	79.8%	5	3.9%	9	7.0%	5	3.9%	7	5.4%	129
Retail	26	57.8%	3	6.7%	3	6.7%	12	26.7%	1	-	45
Salon	24	85.7%	2	7.1%	1	3.6%	1	3.6%	-	-	28
Services	19	73.1%	-	-	1	3.6%	6	23.1%	-	-	26
Other/Undefined	9	75.0%	-	-	-	-	-	-	3	25.0%	12
Total	305	-	24	-	47	-	77	-	38	-	491

Table 3: Analysis of Ownership Structures by Business Sector in Relation to Same Sector

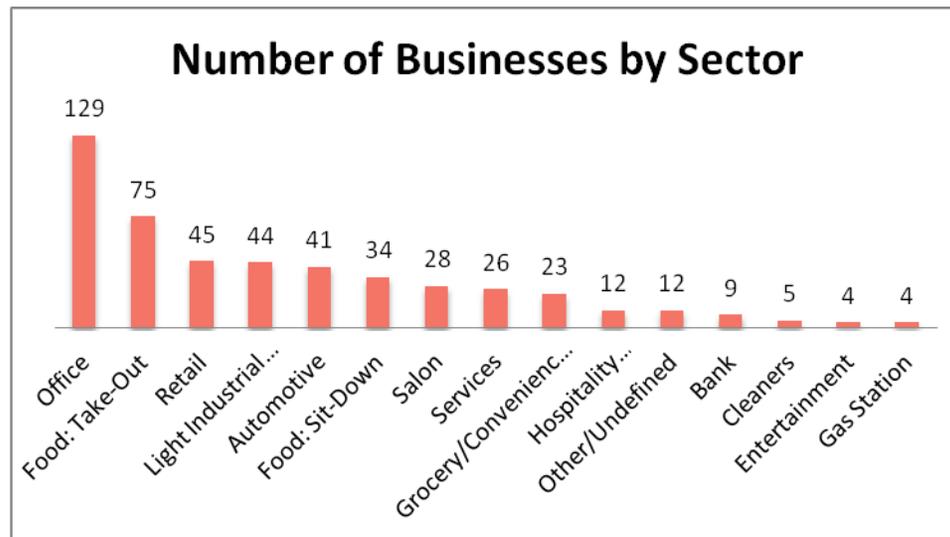
Table 4 below also summarizes the ownership structure of businesses in the City of College Park as it relates to their sector. However, it can also be used to identify the overall significance of a particular combination of business sector and ownership structure within the City of College Park. For example, out of the 491 businesses in College Park, 32 are local automotive-related businesses, which accounts for 6.5% of all businesses.

Business Sector \ Ownership Structure	Local or Unique	Percentage of All Businesses	Regional	Percentage of All Businesses	National Franchise	Percentage of All Businesses	National Chain	Percentage of All Businesses	Other	Percentage of All Businesses	Total
Automotive	32	6.5%	5	1.0%	1	0.2%	3	0.6%	-	-	41
Bank	-	-	2	0.4%	-	-	7	1.4%	-	-	9
Cleaner	4	0.8%	-	-	1	0.2%	-	-	-	-	5
Entertainment	1	0.2%	1	0.2%	-	-	1	0.2%	1	0.2%	4
Food: Take-Out	23	4.7%	-	-	8	1.6%	28	5.7%	16	3.3%	75
Food: Sit-Down	16	3.3%	4	0.8%	2	0.4%	7	1.4%	5	1.0%	34
Gas Station	-	-	-	-	4	0.8%	-	-	-	-	4
Grocery/Convenience	9	1.8%	1	0.2%	5	1.0%	3	0.6%	5	1.0%	23
Hospitality	-	-	-	-	11	2.2%	1	0.2%	-	-	12
Light Ind. Warehouse	39	7.9%	1	0.2%	1	0.2%	3	0.6%	-	-	44
Office	103	21.0%	5	1.0%	9	1.8%	5	1.0%	7	1.4%	129
Retail	26	5.3%	3	0.6%	3	0.6%	12	2.4%	1	0.2%	45
Salon	24	4.9%	2	0.4%	1	0.2%	1	0.2%	-	-	28
Services	19	3.9%	-	-	1	0.2%	6	1.2%	-	-	26
Other/Undefined	9	1.8%	-	-	-	-	-	-	3	0.6%	12
Total	305	-	24	-	47	-	77	-	38	-	491

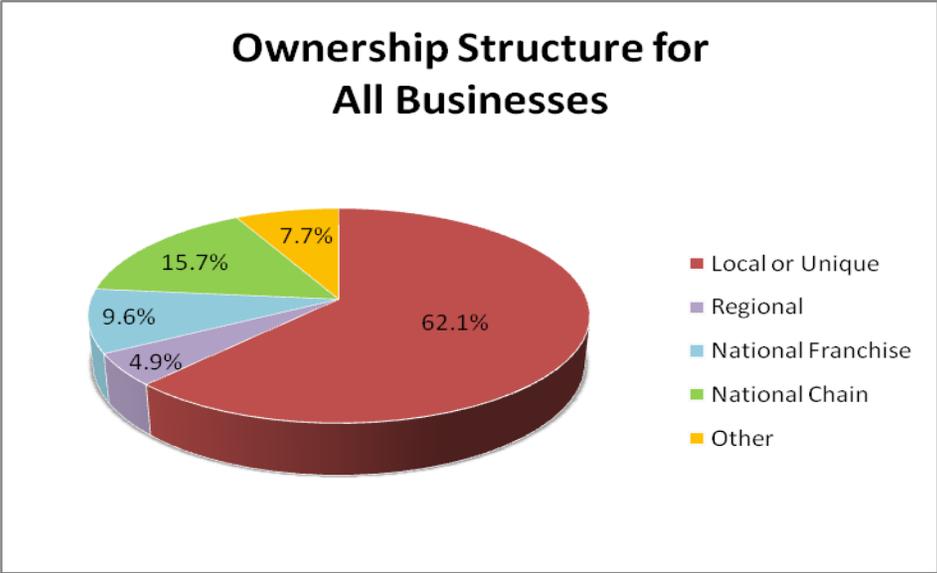
Table 4: Analysis of Ownership Structure by Business Sector in Relation to All Businesses

The following graphs depict additional information from the preceding tables regarding the business sectors and ownership structures. Graph 3 displays the total number of businesses by sector with Office as the clear leader with 129 businesses, while Food: Take-Out and Retail trail significantly with 75 and 45 businesses, respectively. On the other end of the spectrum, Entertainment and Gas Station only account for four businesses each.

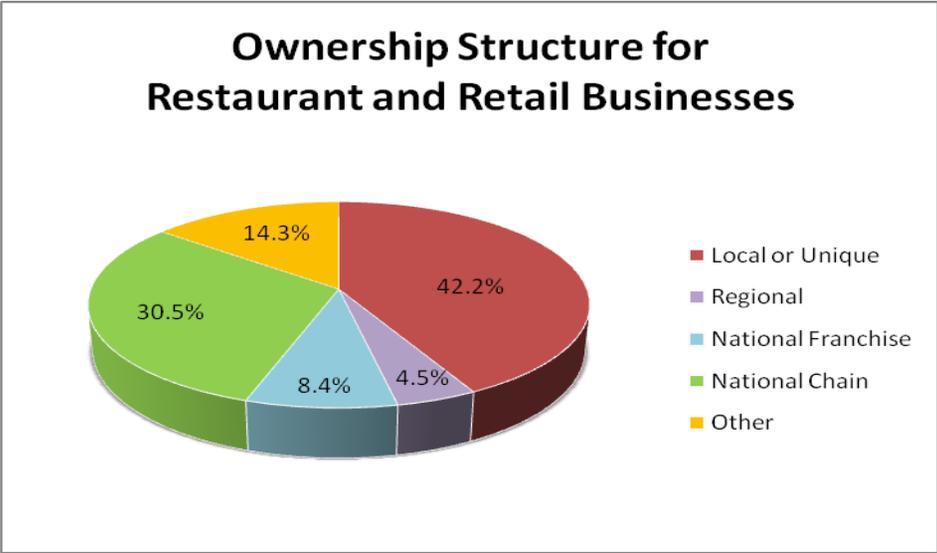
Graph 4 and Graph 5 focus on the ownership structure of College Park businesses, a particularly relevant topic given the national push to increase patronage of local businesses. Graph 4 depicts the ownership structure share for all businesses by percentage, which shows that College Park has a strong local business sector with 62.1% of all businesses having their sole or primary operation in the city. Graph 5 focuses solely on the ownership structure of the restaurant and retail sectors with the results showing a nearly even mix between local options, 42.2%, and national chains/franchises, 38.9%. Finally, Graph 6 displays the share of local businesses by each sector. The sector with the largest share of local businesses is Office with 33.8%, while Light Industrial Warehouse, Automotive, and Retail trail with 12.8%, 10.5%, and 8.5%, respectively.



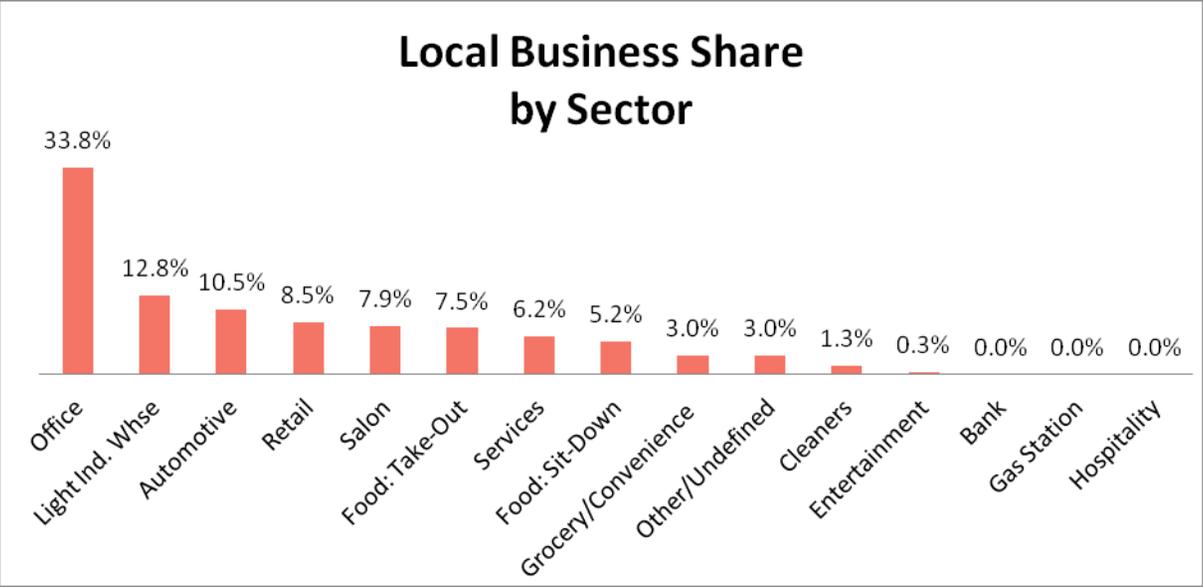
Graph 3



Graph 4



Graph 5



Graph 6