

# Appendix C

## Retail Gap Analysis



A retail gap analysis was conducted to identify retail categories where there is currently unmet spending potential. The spending potential, based on the surveyed spending patterns of individual households within certain income brackets multiplied by the number of households within the study area, for a certain category of retail products or services provides an estimate of the demand for that category. When the demand for that retail category is greater than the observed actual sales within the same study area, that indicates that there is an opportunity for a new business to provide that particular good or service more locally. The retail gap analysis was performed for three levels of the Jenkintown Retail Trade Area: 1-mile radius, 3-mile radius, and 5-mile radius from the corner of Old York Road and West Avenue (see Map 14 on page #). See the Economic Development theme chapter for more information on retail gap analyses.

**Table 54: Retail Gap Analysis for Radius 1**

Radius 1: 405 York Road, Jenkintown, PA 19046, 0.00-1.00 miles, Total				
Retail Stores	Demand (Sales Potential)	Supply (Retail Sales)	# of Businesses	Retail Opportunity (Retail Surplus)
<b>Total Retail Sales Including Eating and Drinking Places</b>	<b>\$365,069,390</b>	<b>\$598,276,256</b>	<b>196</b>	<b>(\$233,206,866)</b>
<b>Motor Vehicle and Parts Dealers</b>	<b>\$72,634,418</b>	<b>\$283,313,991</b>	<b>13</b>	<b>(\$210,679,573)</b>
Automotive Dealers	\$60,507,942	\$282,626,731	12	(\$222,118,789)
Other Motor Vehicle Dealers	\$7,481,627	\$148,824	0	\$7,332,803
Automotive Parts/Accessories, Tire Stores	\$4,644,850	\$538,436	1	\$4,106,414
<b>Furniture and Home Furnishings Stores</b>	<b>\$9,950,287</b>	<b>\$12,496,640</b>	<b>9</b>	<b>(\$2,546,353)</b>
Furniture Stores	\$6,078,316	\$5,613,291	4	\$465,025
Home Furnishing Stores	\$3,871,971	\$6,883,350	4	(\$3,011,379)
<b>Electronics and Appliance Stores</b>	<b>\$18,038,379</b>	<b>\$24,227,315</b>	<b>9</b>	<b>(\$6,188,936)</b>
<b>Building Material, Garden Equipment Stores</b>	<b>\$17,213,530</b>	<b>\$2,950,289</b>	<b>6</b>	<b>\$14,263,241</b>
Building Material and Supply Dealers	\$15,246,598	\$2,950,289	6	\$12,296,309
Lawn, Garden Equipment, Supplies Stores	\$1,966,932	\$0	0	\$1,966,932

Retail Stores	Demand (Sales Potential)	Supply (Retail Sales)	# of Businesses	Retail Opportunity (Retail Surplus)
<b>Food and Beverage Stores</b>	<b>\$65,711,041</b>	<b>\$144,009,189</b>	<b>12</b>	<b>(\$78,298,148)</b>
Grocery Stores	\$55,558,036	\$137,080,947	5	(\$81,522,911)
Specialty Food Stores	\$3,992,984	\$3,722,280	6	\$270,704
Beer, Wine, and Liquor Stores	\$6,160,021	\$3,205,963	1	\$2,954,058
<b>Health and Personal Care Stores</b>	<b>\$15,251,988</b>	<b>\$30,071,899</b>	<b>19</b>	<b>(\$14,819,911)</b>
<b>Gasoline Stations</b>	<b>\$21,135,836</b>	<b>\$3,584,919</b>	<b>2</b>	<b>\$17,550,917</b>
<b>Clothing and Clothing Accessories Stores</b>	<b>\$16,851,722</b>	<b>\$14,331,547</b>	<b>25</b>	<b>\$2,520,175</b>
Clothing Stores	\$12,275,790	\$8,254,535	16	\$4,021,255
Shoe Stores	\$2,436,350	\$0	0	\$2,436,350
Jewelry, Luggage, Leather Goods Stores	\$2,139,583	\$6,077,013	9	(\$3,937,430)
<b>Sporting Goods, Hobby, Book, Music Stores</b>	<b>\$10,341,483</b>	<b>\$4,628,163</b>	<b>7</b>	<b>\$5,713,320</b>
Sporting Goods, Hobby, Musical Instrument Stores	\$8,277,781	\$2,824,144	5	\$5,453,637
Book, Periodical, and Music Stores	\$2,063,702	\$1,804,019	2	\$259,683
<b>General Merchandise Stores</b>	<b>\$54,934,733</b>	<b>\$24,549,075</b>	<b>4</b>	<b>\$30,385,658</b>
Department Stores Excluding Leased Departments	\$42,708,836	\$22,737,286	2	\$19,971,550
Other General Merchandise Stores	\$12,225,896	\$1,811,789	2	\$10,414,107
<b>Miscellaneous Store Retailers</b>	<b>\$15,822,117</b>	<b>\$18,112,074</b>	<b>36</b>	<b>(\$2,289,957)</b>
Florists	\$817,599	\$572,693	2	\$244,906
Office Supplies, Stationery, Gift Stores	\$3,305,993	\$1,091,854	7	\$2,214,139
Used Merchandise Stores	\$1,211,892	\$640,832	7	\$571,060
Other Miscellaneous Store Retailers	\$10,486,633	\$15,806,695	20	(\$5,320,062)
<b>Non-Store Retailers</b>	<b>\$11,574,914</b>	<b>\$2,693,283</b>	<b>2</b>	<b>\$8,881,631</b>
Electronic Shopping, Mail-Order Houses	\$9,111,851	\$2,693,283	2	\$6,418,568
Vending Machine Operators	\$342,829	\$0	0	\$342,829
Direct Selling Establishments	\$2,120,235	\$0	0	\$2,120,235
<b>Food Service and Drinking Places</b>	<b>\$35,608,943</b>	<b>\$33,307,872</b>	<b>53</b>	<b>\$2,301,071</b>
Full-Service Restaurants	\$18,894,333	\$18,676,527	31	\$217,806
Limited-Service Eating Establishments	\$13,996,097	\$14,082,338	18	(\$86,241)
Special Food Services	\$743,862	\$60,124	1	\$683,738
Drinking Places - Alcoholic Beverages	\$1,974,651	\$488,882	2	\$1,485,769

**Table 55: Retail Gap Analysis for Radius 2**

<b>Radius 2: 405 York Road, Jenkintown, PA 19046, 0.00-3.00 miles, Total</b>				
<b>Retail Stores</b>	<b>Demand (Sales Potential)</b>	<b>Supply (Retail Sales)</b>	<b># of Businesses</b>	<b>Retail Opportunity (Retail Surplus)</b>
Total Retail Sales Including Eating and Drinking Places	\$2,622,687,930	\$2,056,293,020	1,012	\$566,394,910
<b>Motor Vehicle and Parts Dealers</b>	<b>\$523,910,494</b>	<b>\$649,101,780</b>	<b>63</b>	<b>(\$125,191,286)</b>
Automotive Dealers	\$437,582,771	\$632,100,666	47	(\$194,517,895)
Other Motor Vehicle Dealers	\$52,961,803	\$2,111,735	2	\$50,850,068
Automotive Parts/Accessories, Tire Stores	\$33,365,920	\$14,889,379	14	\$18,476,541
<b>Furniture and Home Furnishings Stores</b>	<b>\$71,306,340</b>	<b>\$40,688,586</b>	<b>34</b>	<b>\$30,617,754</b>
Furniture Stores	\$43,750,970	\$19,960,191	13	\$23,790,779
Home Furnishing Stores	\$27,555,370	\$20,728,395	21	\$6,826,975
<b>Electronics and Appliance Stores</b>	<b>\$130,034,037</b>	<b>\$83,553,342</b>	<b>45</b>	<b>\$46,480,695</b>
<b>Building Material, Garden Equipment Stores</b>	<b>\$119,741,922</b>	<b>\$57,413,452</b>	<b>36</b>	<b>\$62,328,470</b>
Building Material and Supply Dealers	\$105,855,247	\$48,675,541	30	\$57,179,706
Lawn, Garden Equipment, Supplies Stores	\$13,886,675	\$8,737,911	6	\$5,148,764
<b>Food and Beverage Stores</b>	<b>\$472,729,363</b>	<b>\$548,329,965</b>	<b>81</b>	<b>(\$75,600,602)</b>
Grocery Stores	\$399,937,298	\$518,862,770	50	(\$118,925,472)
Specialty Food Stores	\$28,748,767	\$17,191,067	22	\$11,557,700
Beer, Wine, and Liquor Stores	\$44,043,299	\$12,276,129	9	\$31,767,170
<b>Health and Personal Care Stores</b>	<b>\$107,765,188</b>	<b>\$126,737,701</b>	<b>88</b>	<b>(\$18,972,513)</b>
<b>Gasoline Stations</b>	<b>\$154,175,941</b>	<b>\$74,561,506</b>	<b>29</b>	<b>\$79,614,435</b>
<b>Clothing and Clothing Accessories Stores</b>	<b>\$121,503,003</b>	<b>\$76,624,751</b>	<b>124</b>	<b>\$44,878,252</b>
Clothing Stores	\$88,554,284	\$50,264,335	81	\$38,289,949
Shoe Stores	\$17,773,189	\$11,915,839	15	\$5,857,350
Jewelry, Luggage, Leather Goods Stores	\$15,175,530	\$14,444,578	27	\$730,952
<b>Sporting Goods, Hobby, Book, Music Stores</b>	<b>\$74,330,137</b>	<b>\$23,546,468</b>	<b>40</b>	<b>\$50,783,669</b>
Sporting Goods, Hobby, Musical Instrument Stores	\$59,513,571	\$16,154,256	26	\$43,359,315
Book, Periodical, and Music Stores	\$14,816,565	\$7,392,212	14	\$7,424,353

Retail Stores	Demand (Sales Potential)	Supply (Retail Sales)	# of Businesses	Retail Opportunity (Retail Surplus)
<b>General Merchandise Stores</b>	<b>\$395,870,995</b>	<b>\$168,572,129</b>	<b>26</b>	<b>\$227,298,866</b>
Department Stores Excluding Leased Departments	\$307,887,272	\$156,202,139	11	\$151,685,133
Other General Merchandise Stores	\$87,983,723	\$12,369,991	15	\$75,613,732
<b>Miscellaneous Store Retailers</b>	<b>\$112,899,735</b>	<b>\$50,544,525</b>	<b>131</b>	<b>\$62,355,210</b>
Florists	\$5,739,185	\$8,872,100	17	(\$3,132,915)
Office Supplies, Stationery, Gift Stores	\$23,433,216	\$7,176,326	39	\$16,256,890
Used Merchandise Stores	\$8,692,771	\$3,877,263	26	\$4,815,508
Other Miscellaneous Store Retailers	\$75,034,562	\$30,618,837	49	\$44,415,725
<b>Non-Store Retailers</b>	<b>\$82,831,530</b>	<b>\$17,752,965</b>	<b>16</b>	<b>\$65,078,565</b>
Electronic Shopping, Mail-Order Houses	\$64,937,589	\$16,519,798	11	\$48,417,791
Vending Machine Operators	\$2,468,128	\$0	0	\$2,468,128
Direct Selling Establishments	\$15,425,813	\$1,233,167	4	\$14,192,646
<b>Food Service and Drinking Places</b>	<b>\$255,589,246</b>	<b>\$138,865,849</b>	<b>299</b>	<b>\$116,723,397</b>
Full-Service Restaurants	\$135,571,928	\$73,541,453	177	\$62,030,475
Limited-Service Eating Establishments	\$100,550,612	\$55,050,677	90	\$45,499,935
Special Food Services	\$5,426,099	\$4,300,011	15	\$1,126,088
Drinking Places - Alcoholic Beverages	\$14,040,606	\$5,973,708	18	\$8,066,898

**Table 56: Retail Gap Analysis for Radius 3**

Radius 3: 405 York Road, Jenkintown, PA 19046, 0.00-5.00 miles, Total				
Retail Stores	Demand (Sales Potential)	Supply (Retail Sales)	# of Businesses	Retail Opportunity (Retail Surplus)
<b>Total Retail Sales Including Eating and Drinking Places</b>	<b>\$7,358,358,972</b>	<b>\$6,449,932,363</b>	<b>3,514</b>	<b>\$908,426,609</b>
<b>Motor Vehicle and Parts Dealers</b>	<b>\$1,617,582,630</b>	<b>\$1,451,436,324</b>	<b>167</b>	<b>\$166,146,306</b>
Automotive Dealers	\$1,215,173,596	\$1,097,140,516	109	\$118,033,080
Other Motor Vehicle Dealers	\$143,146,310	\$451,678,007	5	(\$308,531,697)
Automotive Parts/Accessories, Tire Stores	\$93,116,418	\$68,764,108	54	\$24,352,310
<b>Furniture and Home Furnishings Stores</b>	<b>\$198,606,369</b>	<b>\$129,035,249</b>	<b>101</b>	<b>\$69,571,120</b>
Furniture Stores	\$122,561,598	\$51,571,209	42	\$70,990,389
Home Furnishing Stores	\$76,044,771	\$77,464,040	59	(\$1,419,269)
<b>Electronics and Appliance Stores</b>	<b>\$363,407,658</b>	<b>\$250,681,256</b>	<b>143</b>	<b>\$112,726,402</b>
<b>Building Material, Garden Equipment Stores</b>	<b>\$323,114,988</b>	<b>\$168,954,437</b>	<b>120</b>	<b>\$154,160,551</b>
Building Material and Supply Dealers	\$285,675,365	\$153,408,418	104	\$132,266,947
Lawn, Garden Equipment, Supplies Stores	\$37,439,623	\$15,546,020	15	\$21,893,603
<b>Food and Beverage Stores</b>	<b>\$1,345,979,502</b>	<b>\$1,523,321,501</b>	<b>399</b>	<b>(\$177,341,999)</b>
Grocery Stores	\$1,141,399,157	\$1,425,215,565	279	(\$283,816,408)
Specialty Food Stores	\$82,071,515	\$63,042,664	95	\$19,028,851
Beer, Wine, and Liquor Stores	\$122,508,830	\$35,063,272	26	\$87,445,558
<b>Health and Personal Care Stores</b>	<b>\$301,496,001</b>	<b>\$425,606,291</b>	<b>300</b>	<b>(\$124,110,290)</b>
<b>Gasoline Stations</b>	<b>\$436,002,131</b>	<b>\$244,668,443</b>	<b>100</b>	<b>\$191,333,688</b>
<b>Clothing and Clothing Accessories Stores</b>	<b>\$344,872,846</b>	<b>\$354,554,554</b>	<b>396</b>	<b>(\$9,681,708)</b>
Clothing Stores	\$251,473,878	\$271,564,591	277	(\$20,090,713)
Shoe Stores	\$51,577,330	\$42,845,503	49	\$8,731,827
Jewelry, Luggage, Leather Goods Stores	\$41,821,637	\$40,144,460	69	\$1,677,177
<b>Sporting Goods, Hobby, Book, Music Stores</b>	<b>\$207,827,120</b>	<b>\$105,483,870</b>	<b>130</b>	<b>\$102,343,250</b>
Sporting Goods, Hobby, Musical Instrument Stores	\$165,876,992	\$83,815,965	92	\$82,061,027
Book, Periodical, and Music Stores	\$41,950,128	\$21,667,906	38	\$20,282,222
<b>General Merchandise Stores</b>	<b>\$1,118,732,763</b>	<b>\$860,426,588</b>	<b>129</b>	<b>\$258,306,175</b>
Department Stores Excluding Leased Departments	\$869,042,264	\$583,419,934	44	\$285,622,330
Other General Merchandise Stores	\$249,690,498	\$277,006,653	84	(\$27,316,155)

Retail Stores	Demand (Sales Potential)	Supply (Retail Sales)	# of Businesses	Retail Opportunity (Retail Surplus)
<b>Miscellaneous Store Retailers</b>	<b>\$317,070,905</b>	<b>\$171,474,285</b>	<b>344</b>	<b>\$145,596,620</b>
Florists	\$15,380,672	\$21,686,471	37	(\$6,305,799)
Office Supplies, Stationery, Gift Stores	\$65,374,510	\$32,675,828	100	\$32,698,682
Used Merchandise Stores	\$24,421,870	\$9,811,234	71	\$14,610,636
Other Miscellaneous Store Retailers	\$211,893,853	\$107,300,752	137	\$104,593,101

<b>Non-Store Retailers</b>	<b>\$231,260,285</b>	<b>\$68,021,131</b>	<b>47</b>	<b>\$163,239,154</b>
Electronic Shopping, Mail-Order Houses	\$182,040,336	\$57,212,597	28	\$124,827,739
Vending Machine Operators	\$7,042,350	\$2,034,355	5	\$5,007,995
Direct Selling Establishments	\$42,177,599	\$8,774,180	15	\$33,403,419

<b>Food Service and Drinking Places</b>	<b>\$718,552,081</b>	<b>\$530,122,127</b>	<b>1,138</b>	<b>\$188,429,954</b>
Full-Service Restaurants	\$381,144,258	\$272,075,642	707	\$109,068,616
Limited-Service Eating Establishments	\$283,280,286	\$210,128,410	323	\$73,151,876
Special Food Services	\$15,144,512	\$25,581,036	44	(\$10,436,524)
Drinking Places - Alcoholic Beverages	\$38,983,025	\$22,337,039	64	\$16,645,986

