



Glen Burnie Town Center Revitalization Market Study

Technical Memorandum I

07-02-2021



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Balto.- Annap. Blvd.

Anne Arundel Community College



NO TURN ON RED

ONLY

NORTH
3

ARC TEL CENTER NORTH

Shopper

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1. Introduction

This market study examines Glen Burnie’s existing market and identifies opportunities for future growth in the community overall and targets opportunities for the Glen Burnie Town Center understanding that it represents a small geographic portion of Glen Burnie as a whole. The study is informed by the 2019 Anne Arundel County Land Use Market Analysis completed by RKG. While that analysis looked at a larger geographic area, some key conclusions of the study are pertinent for this effort:

- The sub-market where Glen Burnie is located is the largest in Anne Arundel County. It also enjoyed the largest population growth in real numbers in the county during the study period that examined trends from 1980 to 2018.
- The sub-market where Glen Burnie is located is ripe for additional residential growth for several reasons: proximity to transit, proximity to road infrastructure, existing tolerance and trends of multi-family, housing, proximity to BWI Airport, and a more affordable housing stock.
- In fact, the RKG study indicates that the Glen Burnie sub-market is by far the most affordable in rents and housing unit costs. This makes it attractive for homebuyers and renters looking for affordable housing options but begs the question about “sense of place” for those living there.

This market study delves deeper into these conclusions in a number of areas including::

- Market Definition and Zip Code Survey and trade area definition for the Town Center area of Glen Burnie
- Demographics within this trade area using current numbers from both Claritas and the United States Census,
- Employment assessment and commuting patterns,
- Housing assessment to determine future demand, and
- A retail assessment that indicates specific uses that could be feasible in the Glen Burnie Town Center.

2. Market Definition

Zip Code Survey

The market research began with a zip code survey to determine local trade patterns and penetration into the larger regional market. The zip code survey informs the Primary Trade Area (PTA) for Glen Burnie Town Center and provides the baseline geographies for the demographic profile and market assessment.

The zip code survey was conducted from March 10th to March 19th 2021. Participating businesses were asked to record the zip code of each customer coming through their store. Survey results include:

- 4 Glen Burnie Town Center businesses participated,
- 785 total visits were recorded,
- 43 unique zip codes in 6 states were represented in these visits.

The zip code survey reflects what stakeholder interviews indicated – Glen Burnie Town Center primarily serves a localized market, with limited penetration into the larger regional market.

- 51% of customers were from Glen Burnie zip codes (26% from 21060 and 25% from 21061),
- 85% of customers were from Anne Arundel County,
- 99% of customers were from Maryland,
- Visitor traffic from outside of the Baltimore region to the town center is negligible which is verified by on-the-ground assessments of existing retail mix and interviews with local stakeholders.

The zip code survey provides a solid base for more detailed examination of the Town Center’s market.

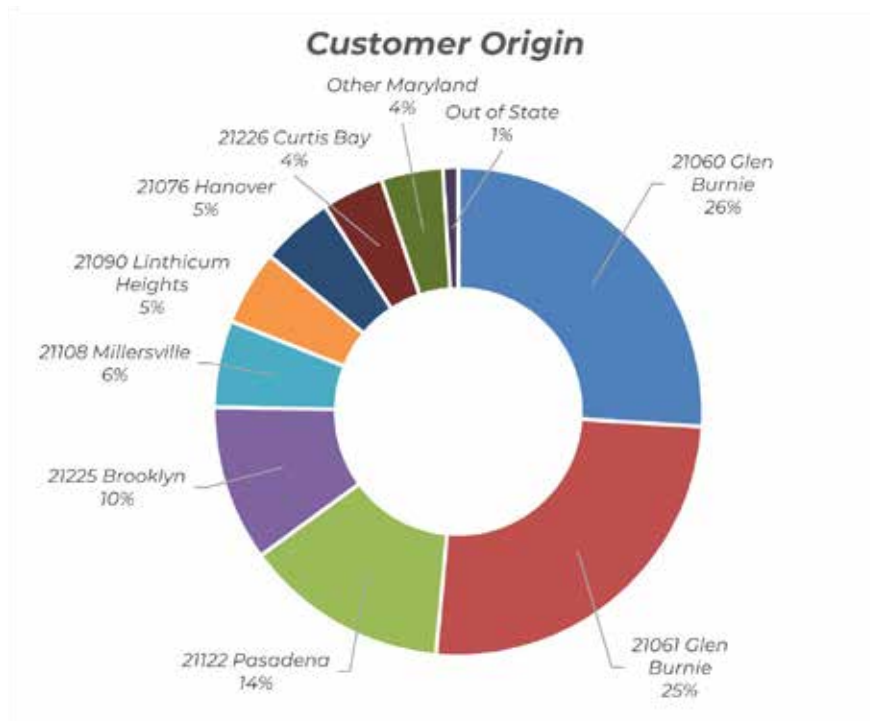


Figure 1: Customer Origin Results from the Glen Burnie Town Center Zip Code Survey

Trade Area Definition

Figure 2 provides customer visits per 1,000 residents for each of the highest represented zip codes. With an estimated 2021 population of 36,187 and 204 recorded customer visits, the 21060 Glen Burnie zip code had the highest visits per population.

Based on the zip code survey results, the area comprised by the two Glen Burnie zip codes (21060 and 21061) is determined to be the PTA for the Glen Burnie Town Center.

Zip Code	Area	2021 Population	Visits	Visits/1000 Pop
21060	Glen Burnie	36,187	204	5.64
21061	Glen Burnie	55,535	200	3.60
21122	Pasadena	63,634	106	1.67
21225	Brooklyn	32,563	81	2.49
21108	Millersville	18,394	45	2.45
21090	Linthicum Heights	9,805	39	3.98
21076	Hanover	18,371	38	2.07
21226	Curtis Bay	7,855	32	4.07

Figure 2: Customer Visits Per 1,000 Population

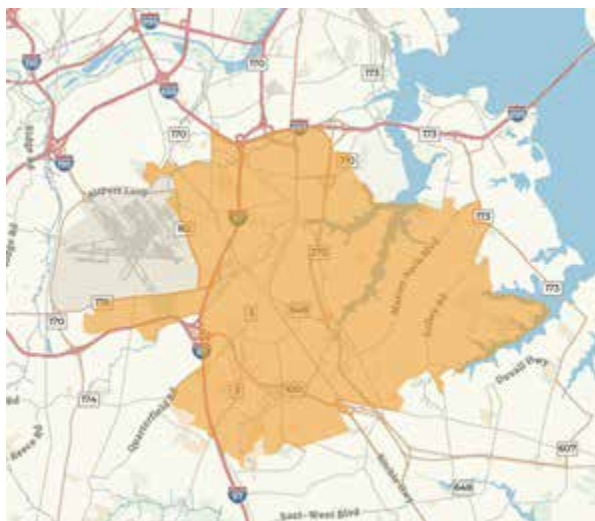


Figure 3: Map of PTA (21060 and 21061 Glen Burnie Zip Codes)

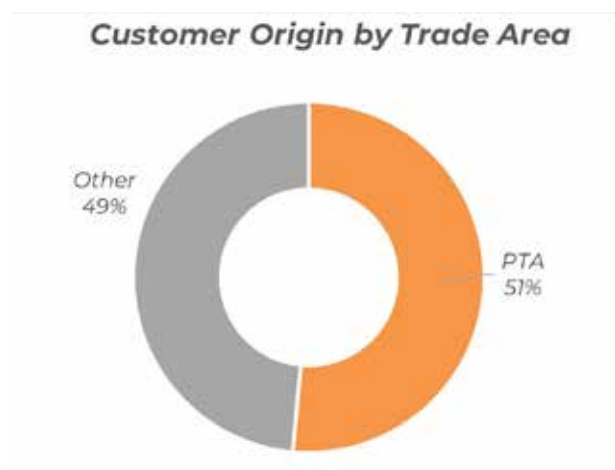


Figure 4: Customer Origin by Trade Area

3. Demographics

A demographic profile for Glen Burnie’s PTA and the surrounding region describes various indicators including population growth, income, age, educational attainment, and ethnicity. Data is provided for the Glen Burnie PTA (previously defined as the two Glen Burnie zip codes), as well as Anne Arundel County and the Baltimore-Columbia-Towson metro area.

Sources of data below come from 2018 US Census On the Map Data, the 2019 American Community Survey (ACS), and 2021 Claritas data. ACS data is the result of an ongoing survey of the US Census Bureau that updates the Census data on an annual basis for population, housing, income, employment and other indicators. Claritas is a leading national market research firm that provides demographic and market projections.

Population

Similar to Anne Arundel County at large, the Glen Burnie PTA has experienced sustained population growth over the past two decades. The estimated 2021 population of the Glen Burnie PTA is 91,722, an increase of 9.2% since 2010. Population growth

is projected to continue over the next five years, though at a slightly slower pace. The PTA population is projected to reach 94,282 by 2026, a 2.8% increase. This growth is projected to add 1,125 households to the PTA over the next 5 years.

Race & Ethnicity

Approximately 56% of the population of Glen Burnie’s PTA identifies as white, 24% identify as Black or African American, and 11% identify as Hispanic or Latino.

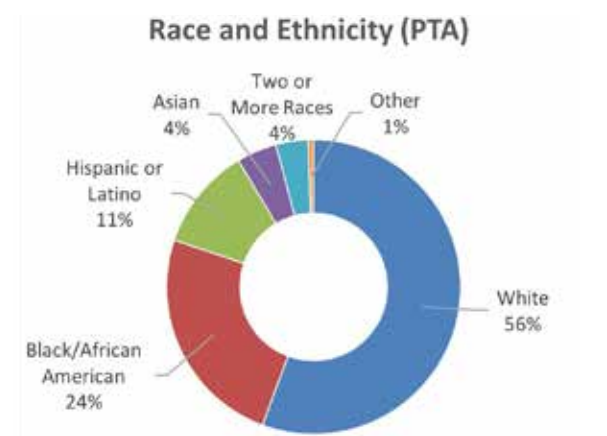


Figure 6: Race and Ethnicity in the PTA (Source: Claritas)

	Population				Households			
	2000 Census	2010 Census	2021 Estimate	2026 Projection	2000 Census	2010 Census	2021 Estimate	2026 Projection
PTA	78,547	84,016	91,722	94,282	30,905	32,831	36,237	37,362
Anne Arundel County	489,658	537,656	585,055	603,525	178,675	199,378	218,756	226,098
Baltimore-Columbia-Towson Metro	2,552,997	2,710,489	2,805,047	2,845,148	974,077	1,038,765	1,076,565	1,092,378
		Population Change 2000-2010	Population Change 2010-2021	Population Change 2021-2026		Population Change 2000-2010	Population Change 2010-2021	Population Change 2021-2026
PTA		7.0%	9.2%	2.8%		6.2%	10.4%	3.1%
Anne Arundel County		9.8%	8.8%	3.2%		11.6%	9.7%	3.4%
Baltimore-Columbia-Towson Metro		6.2%	3.5%	1.4%		6.6%	3.6%	1.5%

Figure 5: Population and Household Growth 2000-2026 (Source: Claritas)

Age

The median age in the PTA is 38.37, slightly younger than the median age in Anne Arundel County (39.22) and the Baltimore-Columbia-Towson metro area (39.31). Figure 6 provides the age distribution of residents in the PTA. Nearly 23% of the PTA residents are children aged 0-17. Millennials and Gen Z (age 25-44) make up about 29% of the population.

Education

Approximately 23% of the population in the PTA have a Bachelor's Degree or Higher compared to 41% in Anne Arundel County and 40% in the Baltimore-Columbia-Towson metro area.

Income

The median household income in the Glen Burnie PTA is \$75,706, compared to \$105,255 in Anne Arundel County and \$86,817 in the Baltimore-Columbia-Towson metro area. Numbers are according to Claritas 2021 data and are validated by 2019 US Census ACS data.

Figure 9 shows the distribution of household incomes across the PTA. The households can roughly be broken down into thirds:

- 30% of households in the PTA have annual incomes of less than \$50k,
- 35% of households in the PTA have annual incomes between \$50k and \$100k,
- 35% of households in the PTA have annual incomes of \$100k or greater.

Approximately 6.32% of families in the PTA are living below poverty level. The federal poverty level (FPL), also known as the "poverty line," is the amount of annualized income earned by a household, below which they would be eligible to receive certain welfare benefits.

Demographic Observations

Key observations from the demographic analysis include:

- The Glen Burnie Town Center PTA has an estimated population of 91,722. If Glen Burnie's PTA were a city, it would rank third in Maryland between Columbia and Germantown. Glen Burnie is a large consumer market.
- Population growth in the Glen Burnie PTA has been robust (9.2% growth between 2010 and 2021) and is projected to continue to be strong (2.8% growth over next 5 years). This growth positions Glen Burnie to benefit from additional spending power, a more diverse population, and changing demands brought about as new people move into the area.
- Median age in the PTA (38.37) is slightly older than the national median age but younger than that of Anne Arundel County. It is likely that this median age will decrease as younger families move into the area.
- Median household income in the PTA (\$75,706) is high compared to the United States and validated by US Census data as well. This income level is lower than Maryland and Ann Arundel County though presenting unique opportunities to fill a more affordable niche within the County.

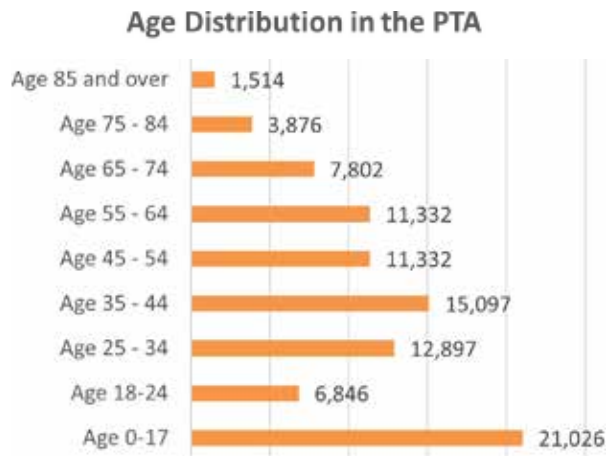


Figure 7: Age Distribution of the PTA Population, 2021 (Source: Claritas)

Educational Attainment in the PTA



Figure 8: Educational Attainment of the Population Age 25+ in the PTA (Source: Claritas)

Distribution of Household Incomes in the PTA

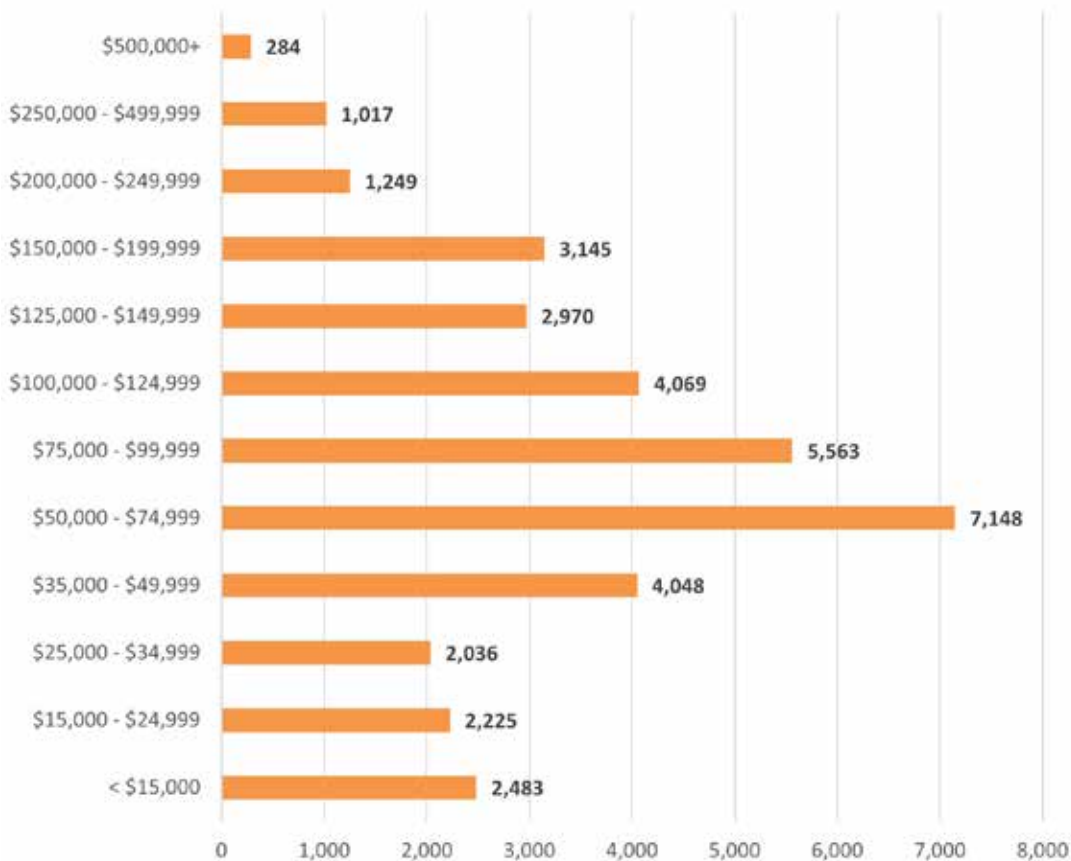


Figure 9: Distribution of Annual Household Incomes in the PTA (Source: Claritas)

4. Employment Assessment

Employment

Employment data was examined for the Glen Burnie PTA (21060 and 21061 zip codes). According to the most recent Census data (2018), there are 36,470 people employed in the PTA. The largest employment sectors in the PTA are:

- Retail (20% of jobs);
- Healthcare (19%); and
- Accommodation and food services (10%).

These three sectors account for approximately half of the jobs in the PTA.

Unemployment Rate

Although unemployment data specific to the PTA is not available it appears that the Unemployment Rate for Glen Burnie is roughly the same as Anne Arundel County at 4.9% in July of 2021. An examination of unemployment rates in Anne Arundel County suggest that employment is rapidly rebounding from the impacts of the pandemic. Overall, unemployment rates in Anne Arundel County follow the same trends as the state, but tend to be lower than the state as a whole.

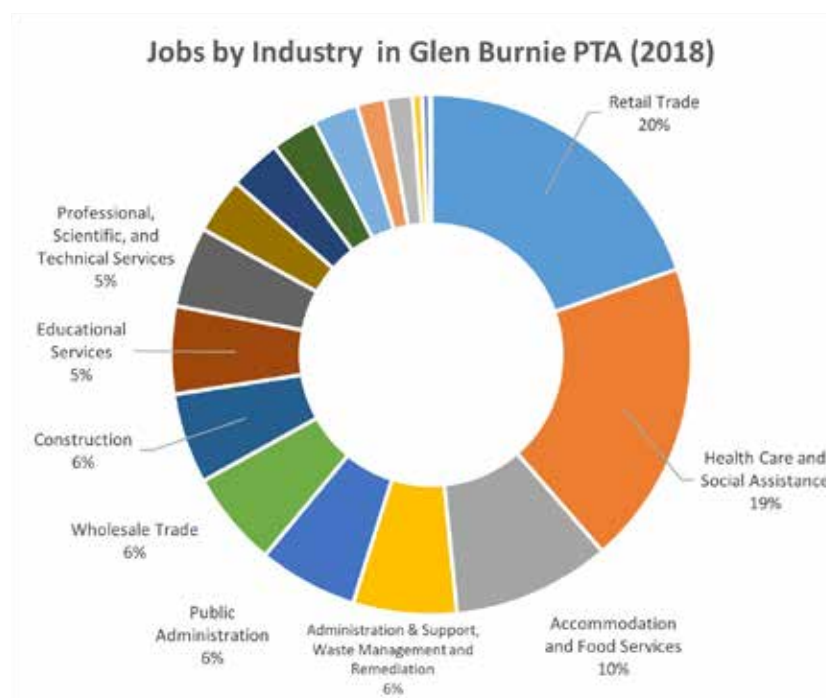


Figure 10: Jobs by NAICS Industry Sector in the Glen Burnie PTA, 2018 (Source: US Census)

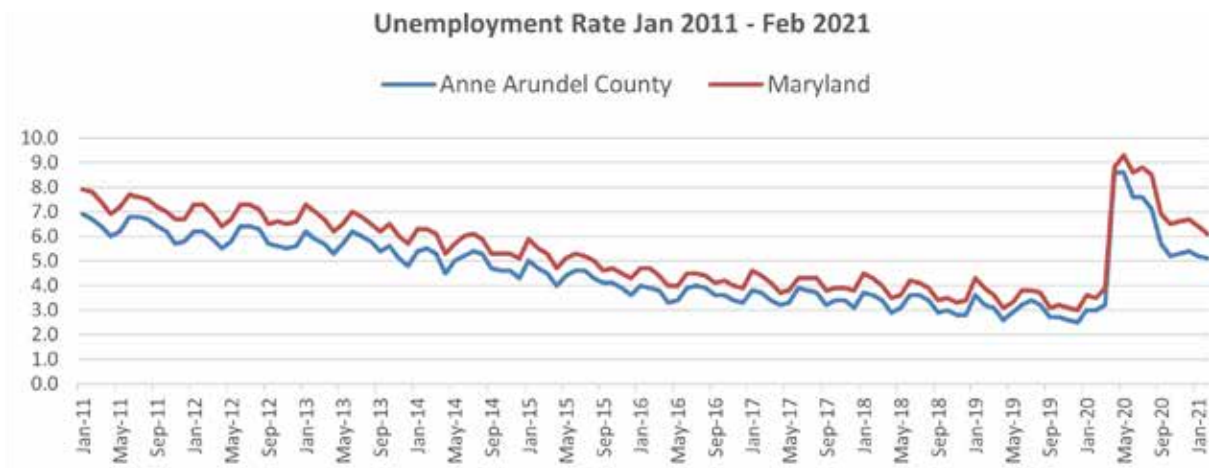


Figure 11: Historical Unemployment Rates 2011-2021 in Anne Arundel County and Maryland (Source: BLS)

Commuting Patterns

The Glen Burnie PTA is a net exporter of jobs, meaning that more people commute out of Glen Burnie for work than commute into Glen Burnie for work. According to the 2018 US Census employment data:

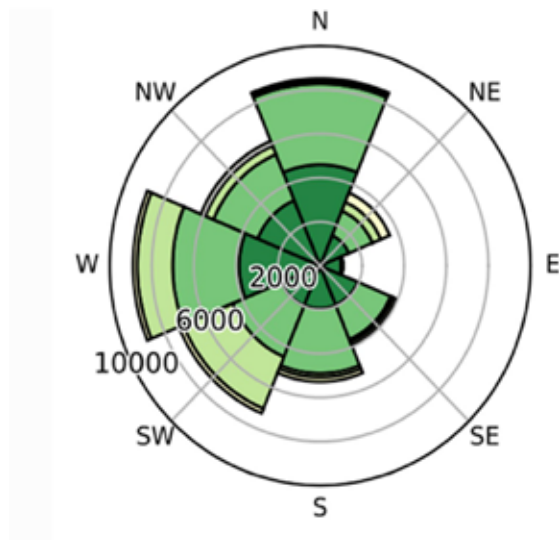
- 4,864 people live AND work in the Glen Burnie zip codes;
- 31,606 people live outside of Glen Burnie and commute into the Glen Burnie zip codes for work; and
- 39,819 people live in the Glen Burnie zip codes and commute outside for work.

The radar maps on the following page show the influence of Baltimore City and BWI Airport on the outflow of work. Conversely, inflow patterns are more equal across the region.



Figure 12: Inflow and Outflow of Jobs from the Glen Burnie Zip Codes, 2018 (Source: US Census On the Map)

Home to Work Commuting out from Glen



Work to Home Commuting into Glen

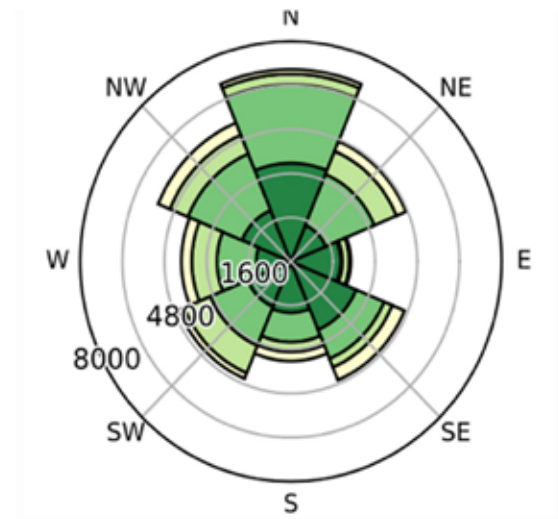


Figure 13: Direction of Commute Into and Out of Glen Burnie Zip Codes, 2018 (Source: US Census On the Map)

Employment Observations

- Glen Burnie's major employment sectors include retail, healthcare and accommodation and food services.
- Glen Burnie is a net exporter of jobs, with residents commuting toward both Baltimore City and BWI Airport.
- Importation of jobs are from around the area with a large amount from Baltimore City.
- Those that commute out from Glen Burnie to other places earn higher wages than those commuting into Glen Burnie. This is a factor of the predominance of retail, food service, and other service oriented jobs in the community itself.
- Unemployment rates are recovering rapidly within the region.

5. Housing Assessment

The market study examines housing in Glen Burnie's PTA including indicators such as tenure, type and value. The housing assessment also examines these indicators in relation to the surrounding region.

Type

The PTA has a mix of housing types in both the single-family and multi-family realm. Just over half (53%) of the housing stock in the PTA is comprised of single-family detached homes and another 13% consists of single-family attached homes such as townhomes. Glen Burnie has a wide array of multi-family housing, but the largest multi-family type are buildings with 5 to 19 units.

Tenure

Approximately 61% of occupied housing units in the Glen Burnie PTA are owner-occupied and 39% are renter-occupied. The PTA has a lower percentage of owner-occupied housing compared to Anne Arundel County (74%) and the Baltimore-Columbia-Towson metro area (67%).

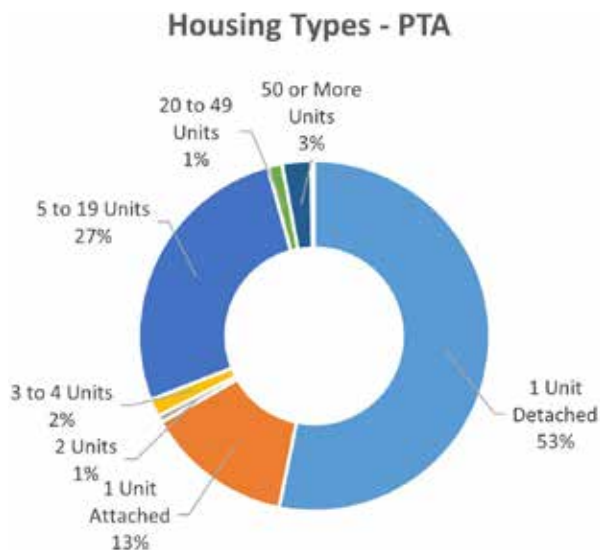


Figure 14: Housing Types in the PTA (Source: Claritas)

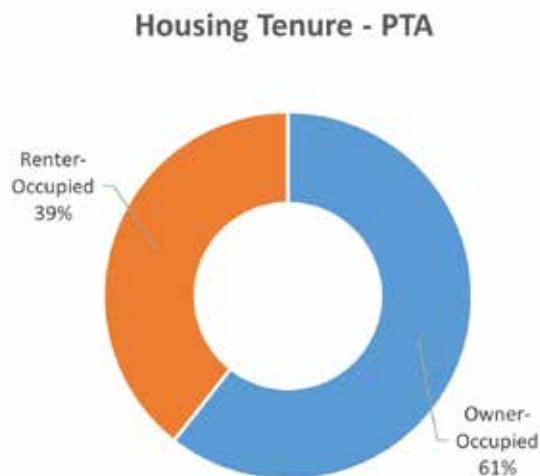


Figure 15: Housing Tenure in the PTA (Source: Claritas)

Housing Value

Housing values in Glen Burnie are more affordable compared to the surrounding county and region. The median value of owner-occupied housing in the PTA is \$287,000, compared to \$337,000 in the Baltimore-Columbia-Towson metropolitan area and \$403,000 in Anne Arundel County. The housing stock in the PTA is concentrated in the \$200k to \$400k range with 39% of the housing valued between \$200k and \$300k.



Figure 16: Distribution of Value of Owner-Occupied Housing in the Glen Burnie PTA, 2021 (Source: Claritas)

Age of Housing

Overall, Glen Burnie has experienced steady construction of housing over the past 70 years. Similar to other communities across the nation, Glen Burnie experienced a dip in housing construction in the early 2000s, but new construction has picked back up since 2010.

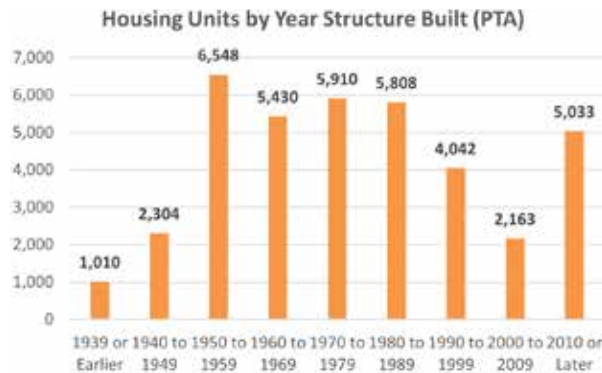


Figure 17: Housing Units by Year Built in the PTA, 2021 (Source: Claritas)

Housing Observations

- The PTA remains predominately single-family housing with an emergence of more multi-family development in recent years.
- Likewise, owner-occupied housing predominates, though the Glen Burnie PTA has a higher percentage of renter-occupied housing than Anne Arundel County and the Baltimore metro area.
- The median housing value in the trade area is considerably more affordable than the Metropolitan Statistical Area and Anne Arundel County.
- Housing construction has remained robust through recent years while observations and anecdotal evidence shows renovation of aging housing stock that is both single family and multi-family.
- The housing market is strong enough to support multi-family place-based housing that is either for rent, owner occupied, or a combination thereof. The potential for housing in the Glen Burnie Town Center is strong as it need only capture a portion of the potential growth in the area over the next five to ten years.

6. Retail Market Assessment

Retail Leakage

The retail market assessment begins with a retail leakage study that identifies potential opportunities for retail growth based on demand within the local market. “Retail Leakage” is a supply and demand study that refers to the difference between the retail expenditures of residents living in a particular geography and the sales produced by stores located in the same area. If residents are purchasing more than stores are selling, dollars are leaking outside the trade areas to other locations. Leakage translates directly to demand. This study examines retail leakage in the Glen Burnie PTA as well as the Glen Burnie Census Designated Place (CDP) and Anne Arundel County.

The data presented in this section comes from Environics Analytics, a national retail marketing service used by town planners, retail & restaurant site planners, and national chains for their market research. Environics Analytics gets its data from a number of sources including: Census of Retail Trade;

Annual Survey of Retail Trade; Census of Employment and Wages, Sales Tax Reports, and various trade associations.

The retail leakage analysis indicates that both the Glen Burnie CDP and the Glen Burnie PTA experienced a retail gain over the past year, meaning that stores sold more than consumers living in the area spent. Stores in the Glen Burnie PTA had retail sales of \$2.26 billion while consumers living in the PTA spent \$1.73 billion, resulting in a market gain of \$532 million. This indicates that Glen Burnie remains a major retail center in the region.

The leakage of sales in Anne Arundel County as a whole is likely a factor of its location between Baltimore and Washington where a large retail base exists.

	<i>Glen Burnie CDP</i>	<i>Glen Burnie PTA (21060 and 21061)</i>	<i>Anne Arundel County</i>
<i>Stores Sell</i>	\$1.81 billion	\$2.26 billion	\$11.83 billion
<i>Consumers Buy</i>	\$1.32 billion	\$1.73 billion	\$13.58 billion
<i>Market Leaks / Gains</i>	\$485 million gain	\$532 million gain	\$1.75 billion leakage

Figure 18: Retail Leakage Analysis for the Glen Burnie CDP, PTA and Anne Arundel County (Source: Claritas/Environics Analytics)

Retail Opportunities in Glen Burnie Town Center

The detailed look at retail sales, consumer expenditures and leakage by retail category provide insight into opportunities within the market. A significant amount of the market gain in Glen Burnie’s PTA occurs within a few retail sectors including automobile dealerships, grocery, and general merchandise. Meanwhile, other retail categories experience leakage in the PTA, indicating an opportunity for growth. Figure 19 shows retail leakage in select categories in the PTA. While some of these opportunities are not suited for the Town Center (Automotive uses and Lawn and Garden), opportunities do exist for Glen Burnie’s town center to capture some of this leakage in these areas, particularly in specialty retail categories.

Retail Demand Growth

In addition to capturing retail leakage in the existing market, opportunities exist to leverage projected growth across retail sectors. Projections indicate that retail demand in the PTA is expected to grow from \$1.73 billion in 2021 to \$1.99 billion in 2026, a growth of \$266 million in the five-year period, or a 2.9% compound annual growth rate. Key growth categories include:

- Restaurants + Eating Places (\$32.3 mil. growth)
- General Merchandise (\$20.1 mil. growth)
- Building Material + Supplies (\$19.7 mil. growth)
- Pharmacy + Drug Stores (\$15.8 mil. growth)
- Food + Beverage Stores (\$15.4 mil. growth)
- Sporting Goods Stores (\$2.7 mil. growth)



Figure 19: Retail Leakage in Select Categories in the PTA (Source: Claritas / Environics Analytics)

Retail Market Observations

- Both the PTA and the Glen Burnie CDP are retail gain markets. This means that retail and restaurant establishments within the geographies sell more than local consumers buy.
- This is to be expected as Glen Burnie remains a major center of shopping for the larger portion of the metro area even in light of new shopping options nearby.
- Much of the market gain in Glen Burnie occurs with Auto Dealerships, Groceries, and General “Big Box” Retailers.
- Specialty retail generally lags with leakage in both the immediate trade area and in Anne Arundel County at large.
- Retail opportunities for the Town Center area concentrate on specialty dining, entertainment, and highly specialized retail and services.
- The relatively small footprint of available retail space makes this area ripe for creative retail spaces that allow for flexibility, small shop formats, and pop-up creative retail and dining experiences.
- The success of these opportunities hinges on a residential population and a more walkable setting.

Overall Market Conclusions

The Glen Burnie town center represents a central location in the community with easy access to the greater Baltimore market. The small size of the target study area coupled with the robust growth in the region allow the site to position itself as a place where amenity rich living options can thrive. New housing types not yet in the Glen Burnie market are key opportunities and these include townhouses, stacked townhouses, stacked flats, and mixed-use apartments.

What makes the Glen Burnie Town Center location even more appealing is the potential to be the community’s true gathering place where open spaces, civic institutions like Anne Arundel Community College, public amenities like the Baltimore and Annapolis Trail, and a historic fabric make this ideally suited for specialty retail, entrepreneurial space, and independent restaurants that cater to a growing population of young families and empty-nesters wanting to live within walking distance of these amenities.

