

BIRMINGHAM AL

HISTORIC 4TH AVENUE BUSINESS DISTRICT



MARKET SNAPSHOT

Birmingham Historic 4th Avenue Business District business owners, community members and local government officials and staff are working together to create a vibrant and thriving district.

Revitalization efforts spearheaded by Urban Impact, Inc. and its partners, along with public and private sector investments, are working to heighten the appeal of the district among consumers, investors and entrepreneurs. Moving forward, it will be important to capitalize upon and leverage these investments and ongoing Urban Impact, Inc. business development and marketing efforts to position the district as a local and regional attraction, economic engine, and center for commerce.

This Market Snapshot, prepared as part of a more comprehensive market study project commissioned by Main Street Alabama, summarizes demographic, lifestyle and retail data, market characteristics and trends in the marketplace. The information, along with market insights to be explored during the project’s ensuing phases, provides groundwork, benchmarks and a basis for important decision-making processes that will help guide future Historic 4th Avenue Business District enhancement strategies.



Creating Jobs. Keeping Character.

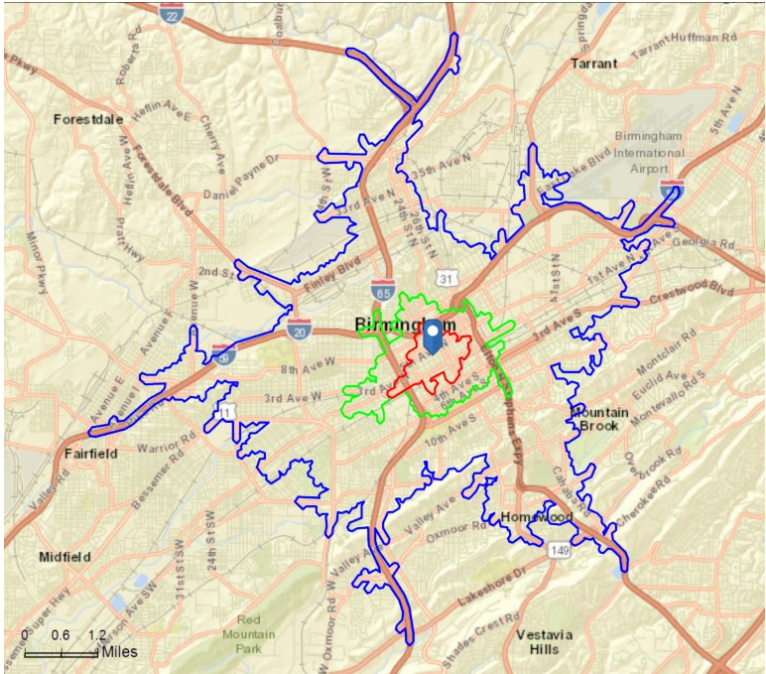
Birmingham’s Historic 4th Ave Business District is a Main Street Alabama community.

Main Street Alabama is focused on bringing jobs, dollars and people back to Alabama’s historic communities. Economic development is at the heart of this statewide organization’s efforts to revitalize downtowns and neighborhoods.

BIRMINGHAM 4TH AVENUE BUSINESS DISTRICT

DEMOGRAPHIC FAST FACTS

Esri 2019



POPULATION

1,703

3 MINUTE DRIVE TIME | 2019
2019—24 GROWTH: 8.9%

Population	3 Min	5 Min	10 Min
2019 Estimate	1,703	6,648	74,494
Growth (2019-24)	8.9%	4.6%	2.5%
<div> <div></div> <div>Est. State Pop Growth (2019-24)</div> </div>			
			2.2%



DAYTIME POP

27,117

3 MINUTE DRIVE TIME | 2019
DAYTIME CHANGE: 1,492.3%

Daytime Population	3 Min	5 Min	10 Min
Total Daytime Pop	27,117	69,726	186,309
Daytime Change	1,492.3%	948.8%	150.1%



HOUSEHOLDS

5,930

3 MINUTE DRIVE TIME | 2019
2019—24 GROWTH: 14.5%

Households	3 Min	5 Min	10 Min
2019 Estimate	857	2,962	33,142
HH Growth (2019-24)	14.5%	8.2%	3.3%
<div> <div></div> <div>Est. State HH Growth (2019-24)</div> </div>			
			2.2%



MEDIAN HH INCOME

\$26,015

3 MINUTE DRIVE TIME | 2019
2019—24 GROWTH: 10.5%

Median HH Income	3 Min	5 Min	10 Min
2019 Estimate	\$26,015	\$22,364	\$30,166
Growth (2019-24)	6.9%	15.4%	17.2%
<div> <div></div> <div>2019 State: \$49,186</div> </div>			
			2019-24 Growth: 9.9%

Source: [Esri Market Profile](#) | 01.20

MARKET TRAITS

ESRI 2019



HOUSING UNITS

2019 HOUSING UNITS SUMMARY

Housing Units	3 Min	5 Min	10 Min
2019 Estimate	1,092	3,632	42,491
- Owner Occupied	10.1%	10.2%	25.2%
- Renter Occupied	68.4%	71.3%	52.8%
- Vacant	21.5%	18.4%	22.0%

Estimated State Percent Vacant (2019) 14.4%

2024 HOUSING UNITS SUMMARY

Housing Units	3 Min	5 Min	10 Min
2024 Projection	1,224	3,898	43,931
- Owner Occupied	10.0%	10.2%	24.6%
- Renter Occupied	70.2%	72.0%	53.2%
- Vacant	19.9%	17.8%	22.1%

Estimated State Percent Vacant (2024) 15.1%



DIVERSITY

2019 DIVERSITY INDEX

Drive Time Households	3 Min	5 Min	10 Min
2019 Diversity Index	46.2	51.2	55.2

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).



\$22,274

PER CAPITA INCOME
3 MINUTES | 2019



43.2

MEDIAN AGE
3 MINUTES | 2019



89.6%

2019 EMPLOYED
3 MIN. CIVILIAN POP 16+

5 Minutes	\$19,715	5 Minutes	34.7	5 Minutes	89.5%
10 Minutes	\$25,363	10 Minutes	36.5	10 Minutes	92.2%
State	\$27,059	State	39.5	State	94.9%



2019 EMPLOYMENT BY OCCUPATION

2019 Employed 16+	3 Min	5 Min	10 Min
Total Estimate	511	2,295	32,489
- White Collar	88.2%	76.5%	60.1%
- Services	7.6%	16.1%	23.9%
- Blue Collar	4.3%	7.4%	16.0%

LIFESTYLE PROFILE

ESRI 2019

Esri's Community Tapestry is a geodemographic segmentation system that integrates consumer traits with residential characteristics to identify markets and classify U.S. neighborhoods. Tapestry Segmentation combines the "who" of lifestyle demography with the "where" of local geography to create a classification with 67 distinct behavioral market segments (Tapestry Segments), each belonging to one of fourteen LifeMode Groups.

Prevalent Esri Tapestry LifeMode Groups

Tapestry LifeMode groups represent markets that share a common experience—born in the same generation or immigration from another country—or a significant demographic trait, like affluence. The Senior Styles and Hometown LifeMode Groups are among those most prevalent in the defined drive time areas.



Senior Styles (LM9) | #1 in 3 and 5 Minute Drives

3 Minutes		5 Minutes		10 Minutes	
HHs	Percent	HHs	Percent	HHs	Percent
827	100%	1,563	52.8%	3,838	11.6%

- ▶ Senior lifestyles reveal the effects of saving for retirement
- ▶ Households are commonly married empty nesters or singles living alone; homes are single-family (including seasonal getaways), retirement communities, or high-rise apartments
- ▶ More affluent seniors travel and relocate to warmer climates; less affluent, settled seniors are still working toward retirement
- ▶ Cell phones are popular, but so are landlines
- ▶ Many still prefer print to digital media: Avid readers of newspapers, to stay current
- ▶ Subscribe to cable television to watch channels like Fox News, CNN, and The Weather Channel
- ▶ Residents prefer vitamins to increase their mileage and a regular exercise regimen



Hometown (LM12) | #1 in 10 Minute Drive

3 Minutes		5 Minutes		10 Minutes	
HHs	Percent	HHs	Percent	HHs	Percent
0	0.0%	364	12.3%	12,746	38.5%

- ▶ Growing up and staying close to home; single householders
- ▶ Close knit urban communities of young singles (many with children)
- ▶ Owners of old, single-family houses, or renters in small multi-unit buildings
- ▶ Religion is the cornerstone of many of these communities
- ▶ Visit discount stores and clip coupons, frequently play the lottery at convenience stores
- ▶ Canned, packaged and frozen foods help to make ends meet
- ▶ Purchase used vehicles to get them to and from nearby jobs

Information on Esri Tapestry methodology and applications, along with descriptions for Tapestry's 67 segments, are available from the Esri website at: <http://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation.htm>

RETAIL VIEW

CLARITAS 2020

The Retail Market Power (RMP) 2020 report from Claritas provides a direct comparison between retail sales and consumer spending by industry. To capture a snapshot of an area's retail market, a sales surplus or leakage—expressed in current dollars—is calculated to summarize the relationship between supply (sales by businesses) and demand (consumer spending). Deviations from potential sales, or demand, may reveal areas of opportunity in the trade area's retail sectors, keeping in mind any extenuating circumstances that may be driving the results.

Calculating Sales Surplus/(Leakage) Estimates

Estimated Actual Sales — Potential Sales = Surplus/(Leakage)

Example: Food Services and Drinking Places (NAICS 722)	
Estimated Sales (Supply)	\$33,903,779
— Potential Sales (Demand)	\$3,369,787
= Surplus or (Leakage)	\$30,533,992

Retailers and real estate analysts use RMP to understand the difference between supply and demand in existing and potential new trade areas. In areas where demand exceeds supply, an opportunity gap—or leakage—exists that can attract new retail operations or inform what changes need to be made to a store's product mix to increase market share. In areas where supply exceeds demand, a surplus exists, which can signal that new marketing strategies may be needed to attract new customers, or that the area is attractive to niche retailers, or it may prompt a store network re-alignment. The following table displays the total amount of estimated sales surplus or leakage for the three drive time geographies.

HISTORIC BIRMINGHAM 4TH AVENUE BUSINESS DISTRICT DRIVE TIME AREAS
SALES SURPLUS AND LEAKAGE ESTIMATES | (\$MM)

Sales Surplus & Leakage (\$MM)	3 Minutes	5 Minutes	10 Minutes
	Surplus/ (Leakage)	Surplus/ (Leakage)	Surplus/ (Leakage)
Total Retail Trade (NAICS 44 – 45)	\$150.2	\$235.6	\$474.2
Total Food and Drink (NAICS 722)	\$30.5	\$42.4	\$57.4
Total (NAICS 44 – 45, 722)	\$180.7	\$278.0	\$531.6

Source: [Claritas Market Power® 2020](#) | Retail Stores Gap.

Data Note: The polarity of surplus/leakage estimates shown in this document (as compared to those shown in source Claritas reports) have been reversed to show surplus as a positive value, and to show leakage as a negative value. The Retail Gap (Sales Surplus/Leakage) represents the difference between Retail Potential (Demand) and Retail Sales (Supply). A positive value represents a surplus in sales, often indicating a market where customers are drawn in from outside the defined area.

RMP focuses on Retail Trade NAICS codes 44 and 45, as well as the Food Services industry NAICS code 722. Once national and county level CRT tables are retrieved from the U.S. Census Bureau, all establishments are coded using 2012 North American Industrial Classification System (NAICS) codes to match the data source. The 2012 NAICS codes are then matched with the latest release of NAICS codes from 2017 to reflect any changes in codes.

PERFORMANCE BY CATEGORY

Sales gap factors provide an at-a-glance means of assessing the relative strength of various retail categories within a defined geography. The factor is a measure of the relationship between supply and demand that ranges from +100 (total surplus) to -100 (total leakage). A positive value represents a surplus of retail sales and can be indicative of a market where customers are drawn from outside the trade area. Categories showing the highest surplus factors may signal possible opportunities for expansion or the introduction of complementary product and service lines to build on market strengths or existing and evolving niche markets. Likewise, categories with negative value factors might offer an initial indication of gaps in the business mix and potential targets for re-positioning, expansion or recruitment.

SALES GAP FACTORS | BIRMINGHAM 4TH AVENUE BUSINESS DISTRICT

Category—Factor	3 Minutes	5 Minutes	10 Minutes
Motor Vehicle and Parts Dealers	83.8	69.0	40.9
Furniture and Home Furnishings Stores	82.6	75.2	27.7
Electronics and Appliance Stores	46.7	38.8	(7.2)
Building Materials, Garden & Supply	80.2	67.8	25.8
Food and Beverage Stores	52.0	32.8	6.6
Health and Personal Care Stores	76.1	58.9	8.9
Gasoline Stations	72.9	56.1	17.1
Clothing and Clothing Accessories	53.3	32.0	(0.3)
Sporting Goods, Hobby, Book, Music	88.4	75.1	35.5
General Merchandise Stores	75.4	60.3	42.3
Miscellaneous Store Retailers	72.3	53.1	8.3
Nonstore Retailers	31.0	(20.2)	(59.5)
Food Services and Drinking Places	81.9	63.6	20.4

Source: Claritas Market Power® 2020 | Retail Stores Gap; [Calculations by DPN](#)

Limitations and Disclaimers

Retail market analyses, their components (such as retail sales gap analyses) and derivative business development plans provide important guidance on how a commercial area should, theoretically, be able to perform and on the sales levels businesses should be able to achieve. However, many factors affect the actual performance of businesses and commercial areas, including the skills of the business operator, level of business capitalization, the quality of the physical environment, changes in overall economic conditions, the effectiveness of business and district marketing programs, and many other variables. The information in this document is intended to provide a foundation of information for making business development decisions, but it does not and cannot ensure business success.

As is true of all demographic, economic and market studies, our analysis' reliability is limited to the reliability and quality of the data available. Our research assumes that all data made available by and procured from federal, state, county, city, primary and third party sources is accurate and reliable.

Because market conditions change rapidly and sometimes without warning, the information and opinions expressed here represent a snapshot in time and cannot predict or gauge future changes or results.

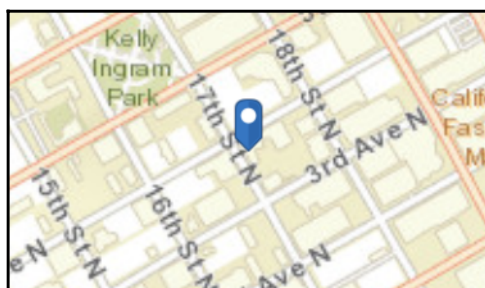
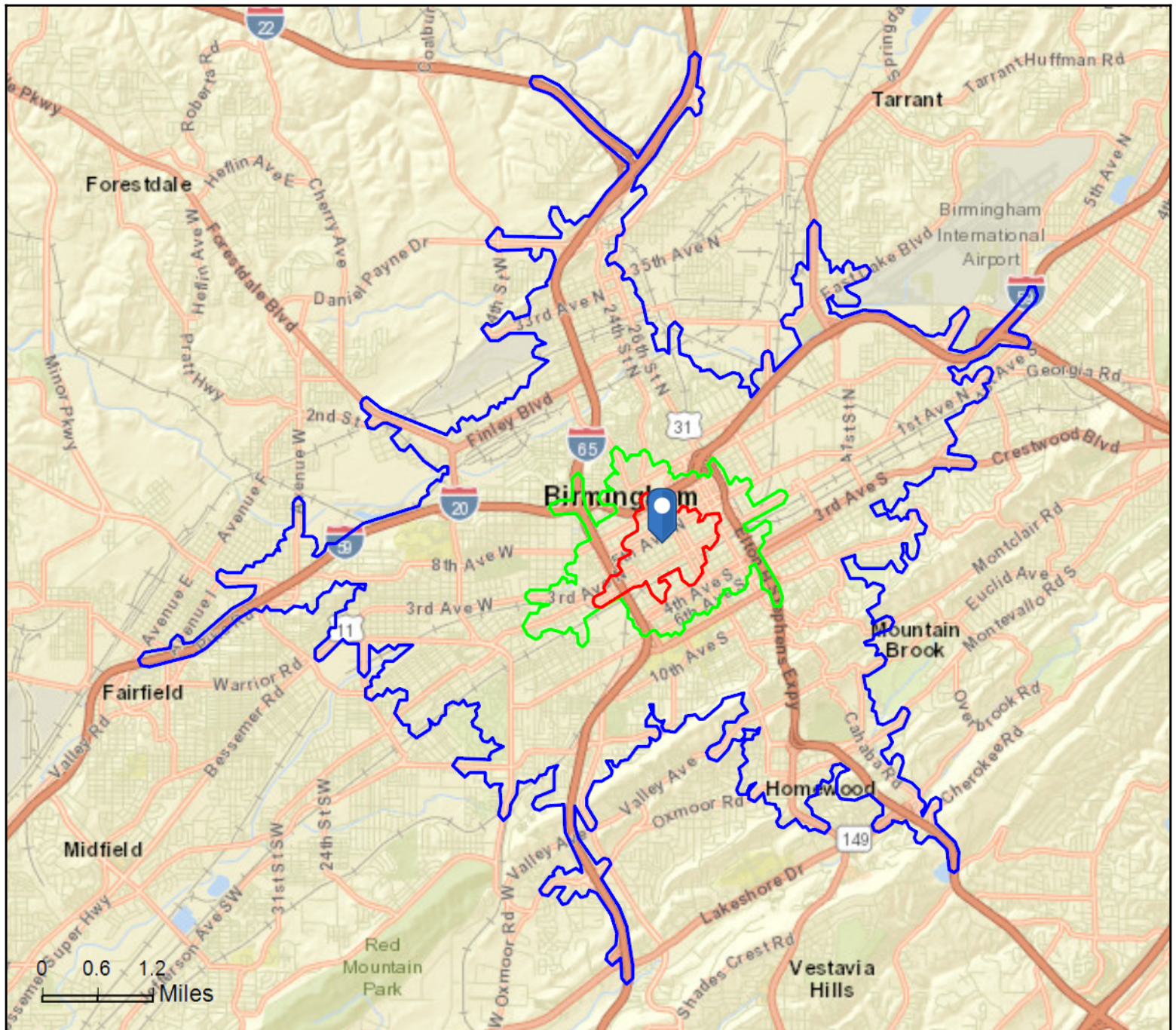
1701 4th Ave N, Birmingham, Alabama, 35203

Drive Time: 3, 5, 10 minute radii

DPN

Latitude: 33.51501

Longitude: -86.81144



Retail Market Power® 2020 | Retail Stores Opportunity Gap

Birmingham Historic 4th Avenue Business District	BHAM 4th Ave - 3 MIN		BHAM 4th Ave - 5 MIN		BHAM 4th Ave - 10 MIN	
	Surplus/(Leakage)	Factor	Surplus/(Leakage)	Factor	Surplus/(Leakage)	Factor
TOTALS						
Total retail trade including food and drink (NAICS 44, 45 and 722)	180,689,461	75.7	278,034,590	57.5	531,602,707	22.2
- Total retail trade (NAICS 44 and 45)	150,155,470	74.6	235,652,962	56.5	474,230,502	22.4
Motor Vehicle and Parts Dealers						
Motor vehicle and parts dealers (NAICS 441)	63,369,191	83.8	96,868,943	69.0	281,268,284	40.9
- Automobile dealers (NAICS 4411)	58,498,194	84.5	86,959,972	69.6	235,991,644	40.0
- - New car dealers (NAICS 44111)	56,672,188	85.6	77,914,264	69.7	161,989,397	33.9
- - Used car dealers (NAICS 44112)	1,826,006	61.4	9,045,707	68.9	74,002,247	66.0
- Other motor vehicle dealers (NAICS 4412)	3,759,414	83.0	7,546,126	73.6	38,605,953	60.0
- - Recreational vehicle dealers (NAICS 44121)	152,524	41.0	1,977,696	72.1	7,680,967	51.0
- - Motorcycle, boat, and other motor vehicle dealers (NAICS 44122)	3,606,890	86.8	5,568,431	74.2	30,924,986	62.7
- - - Boat dealers (NAICS 441222)	(71,506)	(77.4)	(259,527)	(83.3)	(1,236,337)	(28.9)
- - - Motorcycle, ATV, and all other motor vehicle dealers (NAICS 441228)	3,678,395	90.5	5,827,957	81.0	32,161,323	71.4
- Automotive parts, accessories, and tire stores (NAICS 4413)	1,111,584	57.5	2,362,844	45.0	6,670,687	20.5
- - Automotive parts and accessories stores (NAICS 44131)	938,333	65.9	2,102,343	55.2	2,677,480	14.9
- - Tire dealers (NAICS 44132)	173,251	34.0	260,501	18.1	3,993,207	27.4
Furniture and Home Furnishings Stores						
Furniture and home furnishings stores (NAICS 442)	4,108,385	82.6	9,580,099	75.2	11,535,527	27.7
- Furniture stores (NAICS 4421)	2,081,239	80.3	5,772,971	75.5	4,555,911	20.2
- Home furnishings stores (NAICS 4422)	2,027,146	85.0	3,807,128	74.7	6,979,615	36.7
- - Floor covering stores (NAICS 44221)	(29,152)	(99.9)	554,249	73.2	1,980,694	50.5
- - Other home furnishings stores (NAICS 44229)	2,056,298	87.3	3,252,879	75.0	4,998,921	33.1
- - - Window treatment stores (NAICS 442291)	(19,189)	(99.2)	(67,243)	(98.2)	(602,015)	(99.2)
- - - All other home furnishings stores (NAICS 442299)	2,075,487	88.8	3,320,122	77.8	5,600,936	38.7
Electronics and Appliance Stores						
Electronics and appliance stores (NAICS 443)	730,964	46.7	1,883,568	38.8	(1,808,109)	(7.2)
- Household appliance stores (NAICS 443141)	(69,730)	(99.7)	(224,866)	(87.4)	(2,110,607)	(93.6)
- Electronics stores (NAICS 443142)	800,694	53.6	2,108,434	45.9	302,498	1.3
Building Material and Garden Equipment and Supplies Dealers						
Building material and garden equipment and supplies dealers (NAICS 444)	16,687,742	80.2	28,569,604	67.8	42,472,153	25.8
- Building material and supplies dealers (NAICS 4441)	16,202,391	81.7	27,453,790	69.7	47,025,517	30.4
- - Home centers (NAICS 44411)	13,496,337	87.1	19,820,967	75.0	31,239,676	34.4
- - Paint and wallpaper stores (NAICS 44412)	(66,821)	(100.0)	(219,869)	(100.0)	(1,674,418)	(73.1)
- - Hardware stores (NAICS 44413)	(152,765)	(100.0)	(401,584)	(66.4)	(2,975,253)	(48.9)
- - Other building material dealers (NAICS 44419)	2,925,641	71.2	8,254,275	68.0	20,435,511	36.9
- Lawn and garden equipment and supplies stores (NAICS 4442)	485,351	49.6	1,115,815	40.7	(4,553,364)	(45.4)
- - Outdoor power equipment stores (NAICS 44421)	534,876	87.8	1,336,970	84.6	716,279	24.7
- - Nursery, garden center, and farm supply stores (NAICS 44422)	(49,525)	(13.4)	(221,155)	(19.1)	(5,269,644)	(73.8)
Food and Beverage Stores						
Food and beverage stores (NAICS 445)	7,506,732	52.0	12,086,226	32.8	15,414,752	6.6
- Grocery stores (NAICS 4451)	7,104,998	53.4	11,388,501	33.9	19,194,850	8.9
- - Supermarkets and other grocery (except convenience) stores (NAICS 44511)	6,465,056	52.1	9,155,595	30.1	14,308,618	7.1
- - Convenience stores (NAICS 44512)	639,942	71.4	2,232,906	70.8	4,886,231	37.9
- Specialty food stores (NAICS 4452)	(108,201)	(100.0)	(389,898)	(100.0)	(3,221,152)	(88.5)
- - Meat markets (NAICS 44521)	(35,714)	(100.0)	(128,742)	(100.0)	(1,110,421)	(96.3)
- - Fish and seafood markets (NAICS 44522)	(12,965)	(100.0)	(46,742)	(100.0)	(395,691)	(92.8)
- - Fruit and vegetable markets (NAICS 44523)	(22,173)	(100.0)	(79,683)	(100.0)	(683,597)	(95.1)
- - Other specialty food stores (NAICS 44529)	(37,349)	(100.0)	(134,731)	(100.0)	(1,031,443)	(76.9)
- - - Baked goods stores and confectionery and nut stores (NAICS 445291 + 445292)	(20,342)	(100.0)	(73,405)	(100.0)	(579,704)	(81.4)
- - - All other specialty food stores (NAICS 445299)	(17,007)	(100.0)	(61,326)	(100.0)	(451,739)	(71.9)
- Beer, wine, and liquor stores (NAICS 4453)	509,934	49.7	1,087,623	37.4	(558,945)	(3.4)
Health and Personal Care Stores						
Health and personal care stores (NAICS 446)	11,089,499	76.1	17,415,796	58.9	10,542,231	8.9
- Pharmacies and drug stores (NAICS 44611)	11,392,057	79.8	18,460,764	64.7	19,138,494	17.6
- Cosmetics, beauty supplies, and perfume stores (NAICS 44612)	(110,254)	(100.0)	(383,604)	(100.0)	(3,044,177)	(80.4)
- Optical goods stores (NAICS 44613)	(70,060)	(100.0)	(235,274)	(100.0)	(2,130,748)	(100.0)
- Other health and personal care stores (NAICS 44619)	(122,245)	(100.0)	(426,090)	(100.0)	(3,421,337)	(82.2)
- - Food (health) supplement stores (NAICS 446191)	(43,108)	(99.9)	(150,729)	(100.0)	(1,340,306)	(100.0)
- - All other health and personal care stores (NAICS 446199)	(79,136)	(100.0)	(275,362)	(100.0)	(2,081,030)	(73.8)
Gasoline Stations						
Gasoline stations (NAICS 447)	13,460,012	72.9	22,857,510	56.1	31,788,962	17.1
Clothing and Clothing Accessories Stores						
Clothing and clothing accessories stores (NAICS 448)	2,676,385	53.3	4,043,216	32.0	(268,294)	(0.3)
- Clothing stores (NAICS 4481)	3,022,868	64.7	5,208,653	46.2	6,225,280	9.9
- - Men's clothing stores (NAICS 44811)	193,276	69.5	238,005	43.9	4,023,906	58.6
- - Women's clothing stores (NAICS 44812)	1,095,838	75.4	2,563,648	66.6	5,612,583	31.8
- - Children's and infants' clothing stores (NAICS 44813)	82,935	59.5	41,945	14.2	416,853	14.4
- - Family clothing stores (NAICS 44814)	833,512	46.6	1,235,957	26.1	(5,465,558)	(19.9)
- - Clothing accessories stores (NAICS 44815)	284,999	79.1	353,410	56.7	494,984	16.4
- - Other clothing stores (NAICS 44819)	532,309	81.2	775,688	63.7	1,142,514	21.6
- Shoe stores (NAICS 4482)	(164,321)	(99.9)	(539,030)	(76.8)	(1,955,878)	(20.8)
- Jewelry, luggage, and leather goods stores (NAICS 4483)	(182,161)	(99.9)	(626,407)	(90.8)	(4,537,698)	(59.4)
- - Jewelry stores (NAICS 44831)	(164,498)	(99.9)	(562,101)	(89.9)	(3,939,612)	(55.9)
- - Luggage and leather goods stores (NAICS 44832)	(17,663)	(99.8)	(64,306)	(99.9)	(598,085)	(99.9)

Retail Market Power® 2020 | Retail Stores Opportunity Gap

Birmingham Historic 4th Avenue Business District	BHAM 4th Ave - 3 MIN		BHAM 4th Ave - 5 MIN		BHAM 4th Ave - 10 MIN	
	Surplus/(Leakage)	Factor	Surplus/(Leakage)	Factor	Surplus/(Leakage)	Factor
Sporting Goods, Hobby, Musical Instrument, and Book Stores						
Sporting goods, hobby, musical instrument, and book stores (NAICS 451)	4,283,028	88.4	6,313,972	75.1	10,903,973	35.5
- Sporting goods, hobby, and musical instrument stores (NAICS 4511)	4,323,169	89.9	6,375,952	78.0	11,675,484	40.7
- - Sporting goods stores (NAICS 45111)	1,845,207	86.3	3,299,310	75.1	9,442,439	47.1
- - Hobby, toy, and game stores (NAICS 45112)	2,520,702	95.9	3,225,037	88.9	3,266,100	45.9
- - Sewing, needlework, and piece goods stores (NAICS 45113)	(17,515)	(99.6)	(59,370)	(99.8)	(276,692)	(35.1)
- - Musical instrument and supplies stores (NAICS 45114)	(25,224)	(99.8)	(89,025)	(99.9)	(756,364)	(99.9)
- Book stores and news dealers (NAICS 4512)	(40,142)	(99.8)	(61,980)	(25.9)	(771,511)	(37.7)
- - Book stores (NAICS 451211)	(35,585)	(99.7)	(45,422)	(20.4)	(623,017)	(32.8)
- - News dealers and newsstands (NAICS 451212)	(4,557)	(100.0)	(16,558)	(100.0)	(148,494)	(100.0)
General Merchandise Stores						
General merchandise stores (NAICS 452)	20,096,431	75.4	35,576,627	60.3	153,702,356	42.3
- Department stores (NAICS 4522)	807,452	39.3	1,314,030	22.6	(1,478,688)	(3.7)
- Other general merchandise stores (NAICS 4523)	19,288,980	78.5	34,262,597	64.4	155,181,044	47.9
- - Warehouse clubs and supercenters (NAICS 452311)	11,689,830	72.3	20,638,918	56.3	86,025,673	37.7
- - All other general merchandise stores (NAICS 452319)	(7,599,150)	(90.3)	13,623,679	82.4	69,155,370	72.5
Miscellaneous Store Retailers						
Miscellaneous store retailers (NAICS 453)	3,005,083	72.3	4,651,323	53.1	3,384,432	8.3
- Florists (NAICS 4531)	(37,658)	(99.9)	(74,293)	(43.0)	(301,115)	(15.6)
- Office supplies, stationery, and gift stores (NAICS 4532)	941,379	80.8	2,462,230	74.9	3,137,918	28.9
- - Office supplies and stationery stores (NAICS 45321)	795,098	90.3	2,024,703	86.7	2,595,483	46.8
- - Gift, novelty, and souvenir stores (NAICS 45322)	146,281	51.5	437,528	46.1	542,435	10.2
- Used merchandise stores (NAICS 4533)	1,287,917	88.9	1,659,463	73.8	3,861,964	41.4
- Other miscellaneous store retailers (NAICS 4539)	813,445	54.1	603,923	19.8	(3,314,336)	(18.0)
- - Pet and pet supplies stores (NAICS 45391)	123,246	37.9	351,573	33.9	159,361	2.6
- - Art dealers (NAICS 45392)	(45,481)	(99.9)	(165,656)	(100.0)	(1,555,111)	(100.0)
- - Manufactured (mobile) home dealers (NAICS 45393)	444,784	89.9	503,573	74.5	1,399,221	45.9
- - All other miscellaneous store retailers (NAICS 45399)	290,894	45.6	(85,566)	(7.3)	(3,317,806)	(43.6)
- - - Tobacco stores (NAICS 453991)	9,925	6.4	(171,106)	(47.0)	(1,166,166)	(37.6)
- - - All other miscellaneous store retailers (except tobacco stores) (NAICS 453998)	280,969	58.2	85,539	10.6	(2,151,640)	(47.7)
Non-store Retailers						
Non-store retailers (NAICS 454)	3,142,018	31.0	(4,193,921)	(20.2)	(84,705,763)	(59.5)
- Electronic shopping and mail-order houses (NAICS 4541)	1,008,093	13.6	(5,970,685)	(35.7)	(78,175,430)	(60.5)
- Vending machine operators (NAICS 4542)	752,184	88.7	765,323	69.0	(513,731)	(20.2)
- Direct selling establishments (NAICS 4543)	1,381,741	72.2	1,011,441	35.3	(6,016,602)	(57.4)
- - Fuel dealers (NAICS 45431)	(93,748)	(99.9)	(317,141)	(100.0)	(2,729,996)	(100.0)
- - Other direct selling establishments (NAICS 45439)	1,475,489	81.1	1,328,583	52.1	(3,286,606)	(42.4)
Food Services and Drinking Places						
Food services and drinking places (NAICS 722)	30,533,992	81.9	42,381,628	63.6	57,372,204	20.4
- Special food services (NAICS 7223)	2,848,053	83.7	4,031,972	66.9	6,859,438	27.2
- - Food service contractors (NAICS 72231)	1,899,682	80.7	2,316,398	58.7	2,520,518	14.4
- - Caterers (NAICS 72232)	952,455	91.1	1,730,281	83.7	4,473,565	59.2
- - Mobile food services (NAICS 72233)	(4,084)	(100.0)	(14,708)	(100.0)	(134,646)	(100.0)
- Drinking places (alcoholic beverages) (NAICS 7224)	(123,609)	(100.0)	(296,229)	(51.7)	(1,591,546)	(23.2)
- Restaurants and other eating places (NAICS 7225)	27,809,548	82.4	38,645,885	64.4	52,104,313	21.0
- - Full-service restaurants (NAICS 722511)	12,153,577	81.1	11,666,059	53.5	12,801,798	12.0
- - Limited-service restaurants (NAICS 722513)	14,162,955	84.6	25,878,920	73.6	44,775,918	34.4
- - Cafeterias, grill buffets, and buffets (NAICS 722514)	1,386,810	93.7	1,502,770	81.7	1,224,614	28.4
- - Snack and non-alcoholic beverage bars (NAICS 722515)	106,206	19.8	(401,866)	(34.9)	(6,698,017)	(89.1)
- - - Ice cream, soft serve and frozen yogurt shops (NAICS 7225151C + 7225152)	127,888	66.0	68,968	22.5	(862,354)	(66.0)
- - - Doughnut shops (NAICS 7225153)	(14,823)	(28.0)	(99,983)	(69.2)	(1,095,777)	(96.1)
- - - Bagel shops (NAICS 7225154)	(9,527)	(94.3)	(35,035)	(98.1)	(323,307)	(99.8)
- - - Coffee shops (NAICS 7225155)	41,239	18.3	(176,762)	(36.2)	(2,882,484)	(90.2)
- - - Cookie shops (NAICS 7225156)	(1,375)	(85.1)	(5,250)	(95.0)	(49,177)	(99.4)
- - - Other snack and non-alcoholic beverage bars (NAICS 7225157)	(37,195)	(69.6)	(153,805)	(89.0)	(1,484,918)	(98.7)

Data Note: The polarity of surplus/leakage estimates shown in this document (as compared to those shown in source Claritas/EA reports) have been reversed to show surplus as a positive value, and leakage as a negative value. The Retail Gap (Sales Surplus/Leakage) represents the difference between Retail Potential (Demand) and Retail Sales (Supply). A positive value represents a surplus in sales, often indicating a market where customers are drawn in from outside the defined area. In areas where demand exceeds supply, an opportunity gap - or leakage - exists that can attract new retail operations or inform what changes need to be made to a store's product mix to increase market share.

Factors: Sales gap factors (sometimes referred to as Pull Factors) provide an at-a-glance means of assessing the relative strength of various retail categories within a defined geography. The factor displayed in this instance is a measure of the relationship between supply and demand that ranges from +100 (total surplus) to -100 (total leakage). A positive value represents a surplus of retail sales and can be indicative of a market where customers are drawn from outside the trade area. Categories showing the highest surplus factors may signal possible opportunities for expansion or the introduction of complementary product and service lines to build on market strengths or existing and evolving niche markets. Likewise, categories with negative value factors might offer an initial indication of gaps in the business mix and potential targets for re-positioning, expansion or recruitment.