

DOWNTOWN ENTERPRISE

ENTERPRISE, ALABAMA



MARKET SNAPSHOT

Enterprise Main Street and community partners are taking a proactive approach to planning for the future prosperity of the community's traditional downtown business district.

The efforts of Enterprise Main Street and its partners, along with public and private sector investments, are working to heighten the appeal of the downtown business district among consumers, investors and entrepreneurs. Moving forward, it will be important to capitalize upon and leverage these investments and ongoing Enterprise Main Street business development and marketing efforts to position downtown Enterprise 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, highlights and 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 Enterprise Main Street downtown enhancement strategies.



Creating Jobs. Keeping Character.

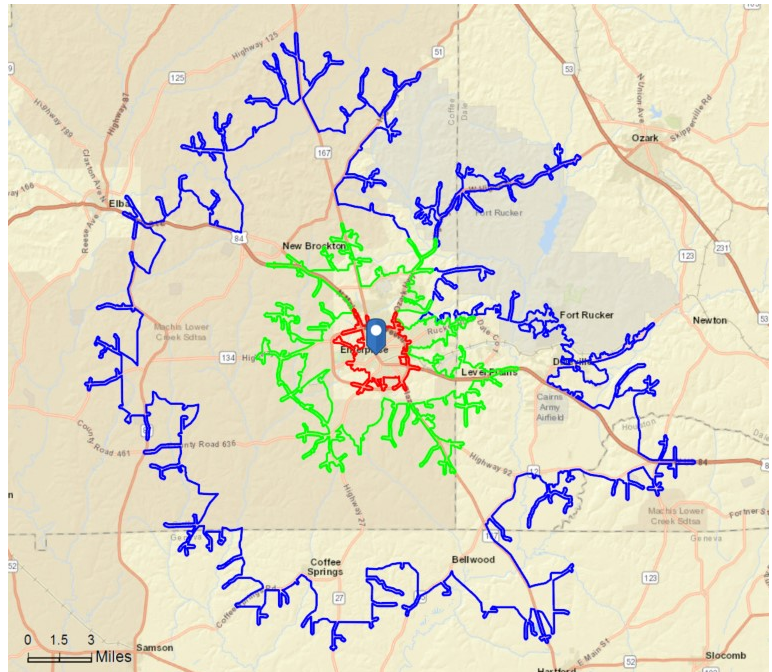
Enterprise is a Main Street Alabama community.

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.

DOWNTOWN ENTERPRISE DRIVE TIME MARKET

DEMOGRAPHIC FAST FACTS

Esri 2019



POPULATION

28,285

10 MINUTE DRIVE TIME | 2019
2019—24 GROWTH: 3.1%

| Population | 5 Min | 10 Min | 20 Min |
|------------------|-------|--------|--------|
| 2019 Estimate | 8,158 | 28,285 | 54,242 |
| Growth (2019-24) | 2.6% | 3.1% | 2.4% |

i Est. State Pop Growth (2019-24) 2.2%



DAYTIME POP

9,865

5 MINUTE DRIVE TIME | 2019
DAYTIME CHANGE: 20.9%

| Daytime Population | 5 Min | 10 Min | 20 Min |
|--------------------|-------|--------|--------|
| Total Daytime Pop | 9,865 | 26,631 | 49,408 |
| Daytime Change | 20.9% | -5.8% | -8.9% |



HOUSEHOLDS

10,988

10 MINUTE DRIVE TIME | 2019
2019—24 GROWTH: 2.6%

| Households | 5 Min | 10 Min | 20 Min |
|---------------------|-------|--------|--------|
| 2019 Estimate | 3,237 | 10,988 | 21,108 |
| HH Growth (2019-24) | 2.4% | 2.6% | 2.0% |

i Est. State HH Growth (2019-24) 2.2%



MEDIAN HH INCOME

\$52,337

10 MINUTE DRIVE TIME | 2019
2019—24 GROWTH: 4.9%

| Median HH Income | 5 Min | 10 Min | 20 Min |
|------------------|----------|----------|----------|
| 2019 Estimate | \$39,240 | \$52,337 | \$52,115 |
| Growth (2018-23) | 7.4% | 4.9% | 5.0% |

i 2019 State: \$49,186 2019-24 Growth: 9.9%

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

MARKET TRAITS

ESRI 2019



HOUSING UNITS

2019 HOUSING UNITS SUMMARY

| Housing Units | 5 Min | 10 Min | 20 Min |
|---------------------------------------|-------|--------|--------|
| 2019 Estimate | 3,756 | 12,198 | 23,774 |
| - Owner Occupied | 42.4% | 50.5% | 52.5% |
| - Renter Occupied | 43.8% | 39.6% | 36.3% |
| - Vacant | 13.8% | 9.9% | 11.2% |
| Estimated State Percent Vacant (2019) | | | 14.4% |



TENURE AND MORTGAGE

HOUSEHOLDS BY TENURE AND MORTGAGE STATUS

| 2010 Tenure/Status | 5 Min | 10 Min | 20 Min |
|--------------------|-------|--------|--------|
| Owner Occupied | 55.1% | 60.6% | 62.6% |
| — With Mortgage | 33.4% | 41.9% | 40.9% |
| — Free and Clear | 21.7% | 18.7% | 21.7% |
| Renter Occupied | 44.9% | 39.4% | 37.4% |



DIVERSITY

2019 DIVERSITY INDEX

| Drive Time Households | 5 Min | 10 Min | 20 Min |
|-----------------------|-------|--------|--------|
| 2019 Diversity Index | 63.6 | 63.0 | 56.5 |

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).



\$21,042

PER CAPITA INCOME
5 MINUTES | 2019



38.7

MEDIAN AGE
5 MINUTES | 2019



94.4%

2019 EMPLOYED
5 MIN. CIVILIAN POP 16+

| | | | | | |
|------------|----------|------------|------|------------|-------|
| 10 Minutes | \$26,130 | 10 Minutes | 36.8 | 10 Minutes | 96.1% |
| 20 Minutes | \$26,451 | 20 Minutes | 36.9 | 20 Minutes | 95.5% |
| State | \$27,059 | State | 39.5 | State | 94.9% |



2019 EMPLOYMENT BY OCCUPATION

| 2019 Employed 16+ | 5 Min | 10 Min | 20 Min |
|-------------------|-------|--------|--------|
| Total Estimate | 3,082 | 12,053 | 22,489 |
| - White Collar | 45.5% | 54.1% | 51.7% |
| - Services | 20.1% | 18.0% | 17.9% |
| - Blue Collar | 34.4% | 27.8% | 30.4% |

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 GenXurban and Rustic Outposts LifeMode Groups are among those most prevalent in the Enterprise drive time areas.



GenXurban (LM5) | #1 in 10 Minute Drive Time

| 5 Minutes | | 10 Minutes | | 20 Minutes | |
|-----------|---------|------------|---------|------------|---------|
| HHs | Percent | HHs | Percent | HHs | Percent |
| 883 | 27.3% | 2,895 | 26.3% | 2,895 | 13.7% |

- ▶ Gen X in middle age; families with fewer kids and a mortgage
- ▶ Second largest Tapestry group, comprised of Gen X married couples, and a growing population of retirees
- ▶ About a fifth of residents are 65 or older; about a fourth of households have retirement income
- ▶ Own older single-family homes in urban areas, with 1 or 2 vehicles
- ▶ Live and work in the same county, creating shorter commute times
- ▶ Invest wisely, well-insured, comfortable banking online or in person
- ▶ News junkies (read a daily newspaper, watch news on TV, and go online for news)
- ▶ Enjoy reading, photo album/scrapbooking, playing board games and cards, doing crossword puzzles, going to museums and rock concerts, dining out, and walking for exercise



Rustic Outposts (LM10) | #1 in 20 Minute Drive

| 5 Minutes | | 10 Minutes | | 20 Minutes | |
|-----------|---------|------------|---------|------------|---------|
| HHs | Percent | HHs | Percent | HHs | Percent |
| 170 | 5.2% | 962 | 8.8% | 5,601 | 26.5% |

- ▶ Country life with older families in older homes
- ▶ Rustic Outposts depend on manufacturing, retail and healthcare, with pockets of mining and agricultural jobs
- ▶ Low labor force participation in skilled and service occupations
- ▶ Own affordable, older single-family or mobile homes; vehicle ownership, a must
- ▶ Residents live within their means, shop at discount stores and maintain their own vehicles (purchased used) and homes
- ▶ Outdoor enthusiasts, who grow their own vegetables, love their pets and enjoy hunting and fishing
- ▶ Technology is cost prohibitive and complicated. Pay bills in person, use the yellow pages, read newspapers, magazines, and mail-order books

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) | \$33,593,446 |
| — Potential Sales (Demand) | \$13,644,011 |
| = Surplus or (Leakage) | \$19,949,435 |

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.

DOWNTOWN ENTERPRISE DRIVE TIME AREAS
SALES SURPLUS AND LEAKAGE ESTIMATES | (\$MM)

| Sales Surplus & Leakage (\$MM) | 5 Minutes | 10 Minutes | 20 Minutes |
|------------------------------------|-----------------------|-----------------------|-----------------------|
| | Surplus/ (Leakage) | Surplus/ (Leakage) | Surplus/ (Leakage) |
| Total Retail Trade (NAICS 44 – 45) | \$212.0 | \$207.0 | (\$18.8) |
| Total Food and Drink (NAICS 722) | \$20.0 | \$16.8 | (\$11.9) |
| Total (NAICS 44 – 45, 722) | \$232.0 | \$223.8 | (\$30.7) |

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 | DOWNTOWN ENTERPRISE DRIVE TIME AREAS

| Category—Factor | 5 Minutes | 10 Minutes | 20 Minutes |
|---------------------------------------|---------------|---------------|---------------|
| Motor Vehicle and Parts Dealers | 60.6 | 40.3 | 11.3 |
| Furniture and Home Furnishings Stores | 68.8 | 47.3 | 19.0 |
| Electronics and Appliance Stores | 41.7 | (7.4) | (42.6) |
| Building Materials, Garden & Supply | 75.5 | 52.9 | 22.4 |
| Food and Beverage Stores | 33.2 | (1.0) | (25.4) |
| Health and Personal Care Stores | 64.1 | 38.7 | 12.0 |
| Gasoline Stations | 33.5 | 16.6 | (3.4) |
| Clothing and Clothing Accessories | 41.7 | 7.0 | (16.1) |
| Sporting Goods, Hobby, Book, Music | 61.3 | 25.7 | (1.8) |
| General Merchandise Stores | 37.5 | 14.3 | 14.4 |
| Miscellaneous Store Retailers | 53.9 | 20.6 | (6.2) |
| Nonstore Retailers | (66.8) | (68.5) | (71.5) |
| Food Services and Drinking Places | 42.2 | 16.0 | (6.1) |

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

Limitations and Disclaimers

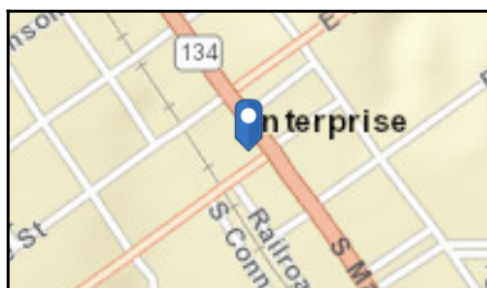
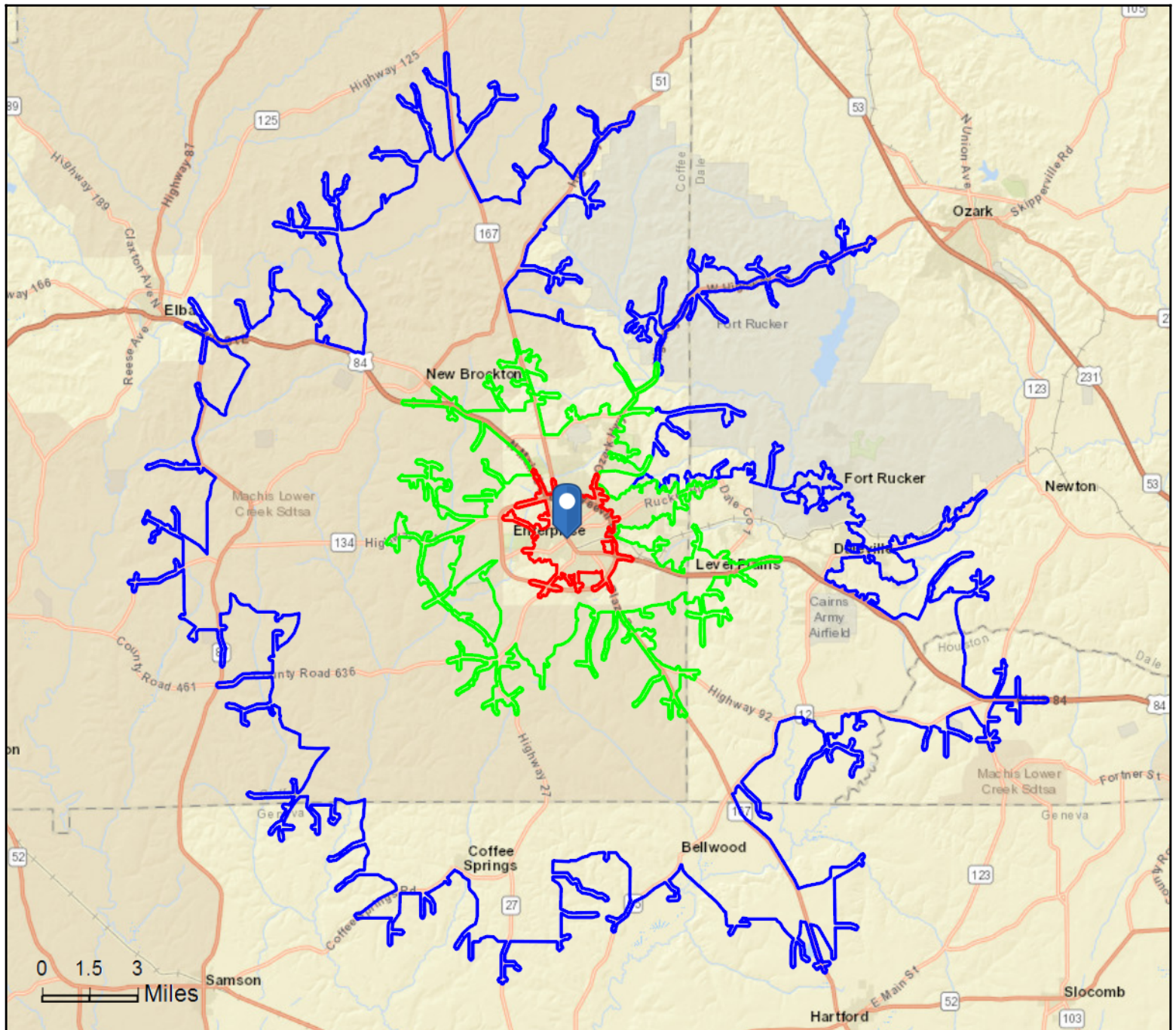
Retail market analyses, their components (such as retail sales gap analyses) and derivative business development plans provide important guidance on how a commercial area should, theoretically, be able to perform and on the sales levels businesses should be able to achieve. However, many factors affect 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.

101 N Main St, Enterprise, Alabama, 36330
 Drive Time: 5, 10, 20 minute radii

DPN
 Latitude: 31.31446
 Longitude: -85.85440



Retail Market Power® 2020 | Retail Stores Opportunity Gap

| Downtown Enterprise Enterprise, AL | Enterprise, AL - 5 MIN | | Enterprise, AL - 10 MIN | | Enterprise, AL - 20 MIN | |
|---|------------------------|---------|-------------------------|---------|-------------------------|---------|
| | Surplus/(Leakage) | Factor | Surplus/(Leakage) | Factor | Surplus/(Leakage) | Factor |
| TOTALS | | | | | | |
| Total retail trade including food and drink (NAICS 44, 45 and 722) | 231,998,205 | 48.9 | 223,752,482 | 22.6 | (30,704,329) | (1.7) |
| - Total retail trade (NAICS 44 and 45) | 212,048,770 | 49.7 | 206,959,373 | 23.4 | (18,796,046) | (1.2) |
| Motor Vehicle and Parts Dealers | | | | | | |
| Motor vehicle and parts dealers (NAICS 441) | 82,052,174 | 60.6 | 117,803,202 | 40.3 | 52,459,631 | 11.3 |
| - Automobile dealers (NAICS 4411) | 78,803,415 | 62.9 | 117,212,909 | 43.5 | 58,411,375 | 14.0 |
| - - New car dealers (NAICS 44111) | 77,840,032 | 65.2 | 102,620,250 | 43.0 | 41,377,102 | 11.4 |
| - - Used car dealers (NAICS 44112) | 963,383 | 16.1 | 14,592,660 | 47.1 | 17,034,272 | 30.6 |
| - Other motor vehicle dealers (NAICS 4412) | (1,728,519) | (100.0) | (5,653,781) | (94.7) | (9,552,559) | (53.1) |
| - - Recreational vehicle dealers (NAICS 44121) | (502,425) | (100.0) | (1,713,214) | (100.0) | (4,068,761) | (100.0) |
| - - Motorcycle, boat, and other motor vehicle dealers (NAICS 44122) | (1,226,095) | (100.0) | (3,940,567) | (92.5) | (5,483,797) | (39.4) |
| - - - Boat dealers (NAICS 441222) | (374,236) | (100.0) | (1,275,291) | (100.0) | (3,022,733) | (99.7) |
| - - - Motorcycle, ATV, and all other motor vehicle dealers (NAICS 441228) | (851,859) | (100.0) | (2,665,276) | (89.3) | (2,461,064) | (22.6) |
| - Automotive parts, accessories, and tire stores (NAICS 4413) | 4,977,280 | 59.5 | 6,244,073 | 37.1 | 3,600,815 | 12.7 |
| - - Automotive parts and accessories stores (NAICS 44131) | 2,478,320 | 55.3 | 3,682,172 | 37.0 | 1,974,253 | 11.9 |
| - - Tire dealers (NAICS 44132) | 2,498,958 | 64.4 | 2,561,902 | 37.2 | 1,626,562 | 13.9 |
| Furniture and Home Furnishings Stores | | | | | | |
| Furniture and home furnishings stores (NAICS 442) | 8,219,092 | 68.8 | 10,823,922 | 47.3 | 6,630,688 | 19.0 |
| - Furniture stores (NAICS 4421) | 3,967,683 | 64.0 | 6,282,807 | 46.4 | 3,608,062 | 17.4 |
| - Home furnishings stores (NAICS 4422) | 4,251,409 | 74.1 | 4,541,114 | 48.7 | 3,022,626 | 21.3 |
| - - Floor covering stores (NAICS 44221) | 1,795,315 | 89.1 | 2,303,851 | 75.9 | 2,248,970 | 56.9 |
| - - Other home furnishings stores (NAICS 44229) | 2,456,094 | 65.9 | 2,237,262 | 35.6 | 773,656 | 7.5 |
| - - - Window treatment stores (NAICS 442291) | (77,743) | (100.0) | (241,396) | (100.0) | (563,141) | (100.0) |
| - - - All other home furnishings stores (NAICS 442299) | 2,533,837 | 69.5 | 2,478,659 | 41.0 | 1,336,797 | 13.8 |
| Electronics and Appliance Stores | | | | | | |
| Electronics and appliance stores (NAICS 443) | 2,469,690 | 41.7 | (753,654) | (7.4) | (7,606,377) | (42.6) |
| - Household appliance stores (NAICS 443141) | 1,776,197 | 75.8 | 1,381,919 | 43.5 | 306,223 | 6.8 |
| - Electronics stores (NAICS 443142) | 693,493 | 19.4 | (2,135,572) | (30.6) | (7,912,599) | (59.2) |
| Building Material and Garden Equipment and Supplies Dealers | | | | | | |
| Building material and garden equipment and supplies dealers (NAICS 444) | 46,575,908 | 75.5 | 52,940,642 | 52.9 | 31,523,948 | 22.4 |
| - Building material and supplies dealers (NAICS 4441) | 38,208,355 | 74.2 | 41,183,029 | 49.8 | 20,870,739 | 17.8 |
| - - Home centers (NAICS 44411) | 31,160,664 | 80.9 | 37,149,961 | 61.8 | 24,510,700 | 31.4 |
| - - Paint and wallpaper stores (NAICS 44412) | 656,410 | 57.2 | 375,359 | 19.7 | (553,639) | (18.4) |
| - - Hardware stores (NAICS 44413) | 1,907,877 | 62.9 | 2,292,723 | 39.5 | 924,485 | 10.2 |
| - - Other building material dealers (NAICS 44419) | 4,483,404 | 51.0 | 1,364,987 | 9.2 | (4,010,807) | (14.8) |
| - Lawn and garden equipment and supplies stores (NAICS 4442) | 8,367,552 | 82.2 | 11,757,611 | 67.6 | 10,653,208 | 44.8 |
| - - Outdoor power equipment stores (NAICS 44421) | 3,231,194 | 92.3 | 6,019,042 | 87.7 | 6,485,692 | 76.8 |
| - - Nursery, garden center, and farm supply stores (NAICS 44422) | 5,136,359 | 76.9 | 5,738,569 | 54.4 | 4,167,516 | 27.2 |
| Food and Beverage Stores | | | | | | |
| Food and beverage stores (NAICS 445) | 14,628,945 | 33.2 | (905,457) | (1.0) | (42,653,786) | (25.4) |
| - Grocery stores (NAICS 4451) | 13,443,767 | 33.7 | (96,776) | (0.1) | (37,753,036) | (25.0) |
| - - Supermarkets and other grocery (except convenience) stores (NAICS 44511) | 12,564,042 | 33.1 | (1,466,260) | (1.9) | (38,521,650) | (27.0) |
| - - Convenience stores (NAICS 44512) | 879,724 | 44.5 | 1,369,484 | 29.3 | 768,615 | 9.1 |
| - Specialty food stores (NAICS 4452) | (469,351) | (100.0) | (1,432,849) | (100.0) | (3,331,826) | (100.0) |
| - - Meat markets (NAICS 44521) | (155,039) | (100.0) | (473,059) | (100.0) | (1,099,986) | (100.0) |
| - - Fish and seafood markets (NAICS 44522) | (56,277) | (100.0) | (171,794) | (100.0) | (399,459) | (100.0) |
| - - Fruit and vegetable markets (NAICS 44523) | (95,744) | (100.0) | (292,314) | (100.0) | (679,695) | (100.0) |
| - - Other specialty food stores (NAICS 44529) | (162,292) | (100.0) | (495,681) | (100.0) | (1,152,686) | (100.0) |
| - - - Baked goods stores and confectionery and nut stores (NAICS 445291 + 445292) | (88,499) | (100.0) | (270,173) | (100.0) | (628,252) | (100.0) |
| - - - All other specialty food stores (NAICS 445299) | (73,793) | (100.0) | (225,508) | (100.0) | (524,435) | (100.0) |
| - Beer, wine, and liquor stores (NAICS 4453) | 1,654,530 | 44.8 | 624,168 | 8.8 | (1,568,924) | (11.6) |
| Health and Personal Care Stores | | | | | | |
| Health and personal care stores (NAICS 446) | 25,774,584 | 64.1 | 27,928,922 | 38.7 | 14,034,921 | 12.0 |
| - Pharmacies and drug stores (NAICS 44611) | 22,941,324 | 65.8 | 25,419,473 | 41.0 | 16,159,654 | 16.0 |
| - Cosmetics, beauty supplies, and perfume stores (NAICS 44612) | (427,098) | (88.6) | (423,953) | (17.9) | (2,213,489) | (51.6) |
| - Optical goods stores (NAICS 44613) | (277,378) | (100.0) | (858,615) | (100.0) | (1,973,933) | (100.0) |
| - Other health and personal care stores (NAICS 44619) | 3,537,736 | 77.8 | 3,792,016 | 55.0 | 2,062,690 | 22.2 |
| - - Food (health) supplement stores (NAICS 446191) | (154,264) | (75.8) | 326,316 | 22.9 | (95,373) | (3.9) |
| - - All other health and personal care stores (NAICS 446199) | 3,692,000 | 85.0 | 3,465,700 | 63.3 | 2,158,063 | 31.6 |
| Gasoline Stations | | | | | | |
| Gasoline stations (NAICS 447) | 10,727,128 | 33.5 | 12,954,858 | 16.6 | (5,005,509) | (3.4) |
| Clothing and Clothing Accessories Stores | | | | | | |
| Clothing and clothing accessories stores (NAICS 448) | 7,098,331 | 41.7 | 2,401,060 | 7.0 | (10,364,473) | (16.1) |
| - Clothing stores (NAICS 4481) | 6,769,013 | 49.1 | 4,212,670 | 15.7 | (4,589,641) | (9.5) |
| - - Men's clothing stores (NAICS 44811) | 554,009 | 61.3 | 437,913 | 27.6 | 121,730 | 4.3 |
| - - Women's clothing stores (NAICS 44812) | 1,694,639 | 53.9 | 1,389,918 | 23.1 | (681,755) | (6.7) |
| - - Children's and infants' clothing stores (NAICS 44813) | 544,424 | 61.9 | 356,378 | 24.3 | 238,424 | 8.5 |
| - - Family clothing stores (NAICS 44814) | 3,773,655 | 48.1 | 2,267,954 | 14.7 | (2,687,968) | (9.6) |
| - - Clothing accessories stores (NAICS 44815) | (152,126) | (100.0) | (487,478) | (98.3) | (821,616) | (55.5) |
| - - Other clothing stores (NAICS 44819) | 354,413 | 41.5 | 247,984 | 13.4 | (758,456) | (25.4) |
| - Shoe stores (NAICS 4482) | 336,325 | 18.5 | (723,654) | (18.1) | (2,361,828) | (27.4) |
| - Jewelry, luggage, and leather goods stores (NAICS 4483) | (7,007) | (0.5) | (1,087,957) | (29.6) | (3,413,002) | (43.8) |
| - - Jewelry stores (NAICS 44831) | 67,303 | 4.9 | (848,522) | (24.7) | (2,854,499) | (39.5) |
| - - Luggage and leather goods stores (NAICS 44832) | (74,310) | (100.0) | (239,435) | (100.0) | (558,504) | (100.0) |

Retail Market Power® 2020 | Retail Stores Opportunity Gap

| Downtown Enterprise Enterprise, AL | Enterprise, AL - 5 MIN | | Enterprise, AL - 10 MIN | | Enterprise, AL - 20 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) | 3,921,576 | 61.3 | 2,793,725 | 25.7 | (329,867) | (1.8) |
| - Sporting goods, hobby, and musical instrument stores (NAICS 4511) | 1,736,916 | 44.8 | 656,892 | 8.6 | (1,860,361) | (12.9) |
| - - Sporting goods stores (NAICS 45111) | 967,733 | 42.8 | 504,237 | 10.5 | (286,189) | (2.9) |
| - - Hobby, toy, and game stores (NAICS 45112) | (247,511) | (100.0) | (807,821) | (100.0) | (1,894,114) | (100.0) |
| - - Sewing, needlework, and piece goods stores (NAICS 45113) | (71,763) | (100.0) | (227,069) | (100.0) | (528,300) | (100.0) |
| - - Musical instrument and supplies stores (NAICS 45114) | 1,088,458 | 84.0 | 1,187,545 | 65.9 | 848,242 | 37.2 |
| - Book stores and news dealers (NAICS 4512) | 2,184,659 | 86.5 | 2,136,833 | 66.1 | 1,530,494 | 37.7 |
| - - Book stores (NAICS 451211) | 2,204,236 | 88.0 | 2,197,592 | 69.3 | 1,671,774 | 42.7 |
| - - News dealers and newsstands (NAICS 451212) | (19,577) | (100.0) | (60,758) | (100.0) | (141,281) | (100.0) |
| General Merchandise Stores | | | | | | |
| General merchandise stores (NAICS 452) | 16,659,268 | 37.5 | 14,367,794 | 14.3 | 33,756,460 | 14.4 |
| - Department stores (NAICS 4522) | (1,402,029) | (36.1) | (7,147,414) | (74.2) | (18,181,457) | (86.7) |
| - Other general merchandise stores (NAICS 4523) | 18,061,297 | 44.6 | 21,515,208 | 23.7 | 51,937,917 | 24.3 |
| - - Warehouse clubs and supercenters (NAICS 452311) | 7,380,804 | 28.0 | 6,125,636 | 9.5 | 18,359,847 | 11.8 |
| - - All other general merchandise stores (NAICS 452319) | 10,680,493 | 75.7 | 15,389,573 | 59.0 | 33,578,069 | 57.4 |
| Miscellaneous Store Retailers | | | | | | |
| Miscellaneous store retailers (NAICS 453) | 5,599,719 | 53.9 | 3,897,994 | 20.6 | (2,066,619) | (6.2) |
| - Florists (NAICS 4531) | 732,104 | 72.7 | 673,360 | 44.0 | 745,486 | 27.2 |
| - Office supplies, stationery, and gift stores (NAICS 4532) | 538,712 | 35.8 | (331,911) | (11.9) | (1,866,899) | (34.3) |
| - - Office supplies and stationery stores (NAICS 45321) | 450,522 | 55.5 | 186,138 | 13.6 | (330,034) | (13.6) |
| - - Gift, novelty, and souvenir stores (NAICS 45322) | 88,190 | 12.7 | (518,049) | (36.1) | (1,536,866) | (50.9) |
| - Used merchandise stores (NAICS 4533) | 105,317 | 13.4 | (501,305) | (29.8) | (1,448,007) | (39.7) |
| - Other miscellaneous store retailers (NAICS 4539) | 4,223,586 | 59.6 | 4,057,850 | 31.5 | 502,801 | 2.4 |
| - - Pet and pet supplies stores (NAICS 45391) | 1,511,881 | 66.0 | 788,635 | 24.7 | (821,153) | (16.9) |
| - - Art dealers (NAICS 45392) | (187,649) | (100.0) | (610,908) | (99.7) | (1,361,339) | (89.9) |
| - - Manufactured (mobile) home dealers (NAICS 45393) | 1,155,549 | 83.9 | 1,229,347 | 62.2 | 837,877 | 32.1 |
| - - All other miscellaneous store retailers (NAICS 45399) | 1,743,805 | 54.0 | 2,650,775 | 37.2 | 1,847,415 | 15.1 |
| - - - Tobacco stores (NAICS 453991) | 198,108 | 23.4 | 1,622,343 | 47.5 | 1,685,467 | 28.8 |
| - - - All other miscellaneous store retailers (except tobacco stores) (NAICS 453998) | 1,545,697 | 64.8 | 1,028,432 | 27.8 | 161,948 | 2.5 |
| Non-store Retailers | | | | | | |
| Non-store retailers (NAICS 454) | (11,677,645) | (66.8) | (37,293,635) | (68.5) | (89,175,066) | (71.5) |
| - Electronic shopping and mail-order houses (NAICS 4541) | (11,164,035) | (72.5) | (34,447,227) | (69.8) | (84,882,664) | (76.8) |
| - Vending machine operators (NAICS 4542) | (205,319) | (100.0) | (632,551) | (100.0) | (1,460,940) | (98.6) |
| - Direct selling establishments (NAICS 4543) | (308,293) | (16.5) | (2,213,857) | (49.3) | (2,831,461) | (22.1) |
| - - Fuel dealers (NAICS 45431) | 115,796 | 13.6 | (439,938) | (24.7) | (993,455) | (23.8) |
| - - Other direct selling establishments (NAICS 45439) | (424,087) | (41.9) | (1,773,919) | (65.4) | (1,838,006) | (21.3) |
| Food Services and Drinking Places | | | | | | |
| Food services and drinking places (NAICS 722) | 19,949,435 | 42.2 | 16,793,111 | 16.0 | (11,908,284) | (6.1) |
| - Special food services (NAICS 7223) | (1,127,552) | (100.0) | (3,627,510) | (99.3) | (7,503,319) | (79.3) |
| - - Food service contractors (NAICS 72231) | (920,533) | (100.0) | (2,964,364) | (99.4) | (6,252,190) | (82.2) |
| - - Caterers (NAICS 72232) | (190,299) | (100.0) | (609,368) | (98.6) | (1,125,795) | (64.9) |
| - - Mobile food services (NAICS 72233) | (16,720) | (100.0) | (53,778) | (100.0) | (125,334) | (100.0) |
| - Drinking places (alcoholic beverages) (NAICS 7224) | 786,522 | 45.9 | (223,232) | (7.9) | (1,907,317) | (36.4) |
| - Restaurants and other eating places (NAICS 7225) | 20,290,466 | 45.7 | 20,643,853 | 21.0 | (2,497,648) | (1.4) |
| - - Full-service restaurants (NAICS 722511) | 2,189,144 | 16.1 | (4,583,742) | (14.2) | (21,127,141) | (32.6) |
| - - Limited-service restaurants (NAICS 722513) | 17,872,401 | 62.9 | 24,311,607 | 41.7 | 21,268,419 | 21.1 |
| - - Cafeterias, grill buffets, and buffets (NAICS 722514) | 512,152 | 57.2 | 318,266 | 20.5 | (231,423) | (8.7) |
| - - Snack and non-alcoholic beverage bars (NAICS 722515) | (283,231) | (19.1) | 597,723 | 9.5 | (2,407,502) | (22.2) |
| - - - Ice cream, soft serve and frozen yogurt shops (NAICS 7225151C + 7225152) | 250,214 | 48.2 | 642,300 | 42.6 | 267,297 | 11.7 |
| - - - Doughnut shops (NAICS 7225153) | (119,363) | (75.2) | 261,069 | 22.6 | (281,199) | (15.6) |
| - - - Bagel shops (NAICS 7225154) | (22,913) | (39.9) | 494,011 | 65.6 | 370,468 | 38.0 |
| - - - Coffee shops (NAICS 7225155) | (378,122) | (100.0) | (837,417) | (52.5) | (2,197,724) | (63.3) |
| - - - Cookie shops (NAICS 7225156) | (6,121) | (100.0) | 65,468 | 62.4 | 106,117 | 53.6 |
| - - - Other snack and non-alcoholic beverage bars (NAICS 7225157) | (6,925) | (1.9) | (27,709) | (2.4) | (672,462) | (31.8) |

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.