

DOWNTOWN WAYLAND

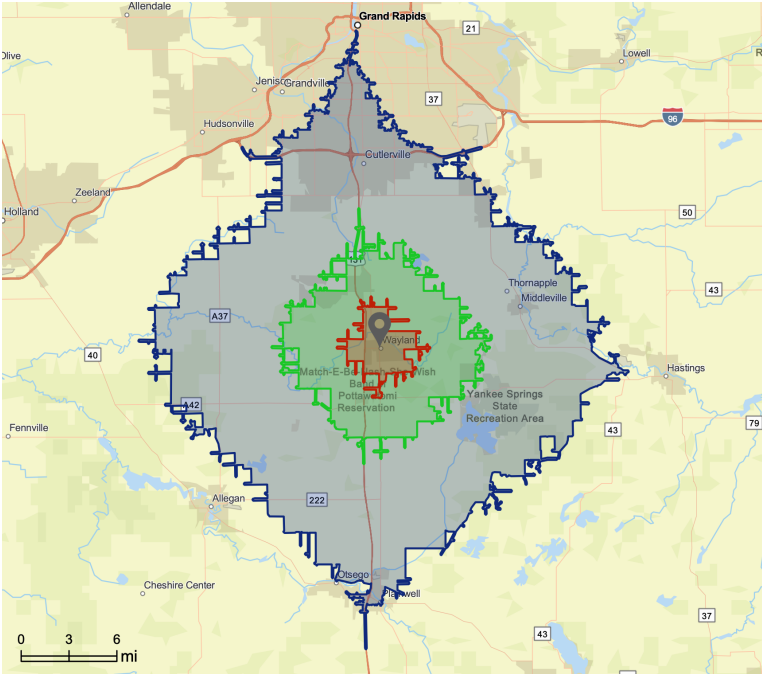
WAYLAND, MICHIGAN



DOWNTOWN WAYLAND DRIVE TIME MARKET

DEMOGRAPHIC FAST FACTS

SOURCE: ESRI 2024



MARKET SNAPSHOT

Wayland Main Street/DDA and community partners are taking a pro-active approach to planning for the future prosperity of Downtown Wayland. Ongoing efforts are serving to heighten the appeal of Downtown Wayland as a place to work, visit, live, do business, and invest. A holistic approach to revitalization is sparking a new wave of activity and positioning Downtown Wayland as a local and regional attraction, economic engine, and center for commerce.

This Market Snapshot, commissioned by Michigan Main Street, a program of The Michigan Economic Development Corporation, summarizes local and regional demographic, lifestyle and retail data. The information provides a starting point for evaluating the market, identifying potential opportunities, and assessing Wayland Main Street/DDA enhancement strategies; and for benchmarking and tracking changes in the market and possible implications for Downtown Wayland.



POPULATION	5 Minutes	10 Minutes	20 Minutes
2010 Total	5,463	15,411	169,298
2020 Total	5,883	17,949	192,523
2024 Estimate	5,849	18,076	196,379
2029 Projection	5,807	18,070	198,931
Growth (2024-29)	-0.7%	0.0%	1.3%
Projected State Population Growth (2024-29)			-0.4%



2024 DAYTIME POP	5 Minutes	10 Minutes	20 Minutes
Total Daytime Population	5,156	13,878	176,761
Workers	2,409	5,202	85,096
Residents	2,747	8,676	91,665
Daytime Change	-11.8%	-23.2%	-10.0%



HOUSEHOLDS	5 Minutes	10 Minutes	20 Minutes
2010 Total	2,052	5,498	61,705
2020 Total	2,230	6,425	69,565
2024 Estimate	2,242	6,507	71,481
2029 Projection	2,245	6,552	73,151
Growth (2024-29)	0.1%	0.7%	2.3%
Projected State Households Growth (2024-29)			1.4%



MEDIAN HH INCOME	5 Minutes	10 Minutes	20 Minutes
2024 Estimate	\$69,402	\$76,306	\$79,513
2029 Projection	\$76,522	\$82,544	\$89,680
Growth (2024-29)	10.3%	8.2%	12.8%
2024 State Median HH: \$71,476			2024-29 Growth: 15.0%



Wayland Main Street /DDA (269) 525-2323 downtownwayland.com

Wayland is a Michigan Main Street community.

Michigan Main Street assists communities revitalizing and preserving their traditional commercial districts.

The program provides technical assistance for communities desiring to develop their own local Main Street program by utilizing the Main Street Approach™ – a common-sense approach to tackling the complex issues of revitalization by capitalizing on downtown’s history and identifying the unique assets of the community itself.



MARKET TRAITS

| SOURCE: ESRI 2024



HOUSING UNITS	5 Minutes	10 Minutes	20 Minutes
2024 Estimate	2,337	6,859	75,254
- Owner Occupied	70.6%	78.1%	74.8%
- Renter Occupied	25.3%	16.8%	20.2%
- Vacant	4.1%	5.1%	5.0%
Estimated State Percent Vacant (2024)			11.3%



POPULATION BY RACE/ETHNICITY—DIVERSITY

Diversity Index	5 Minutes	10 Minutes	20 Minutes
2010	15.0	12.9	41.0
2020	26.4	23.8	55.1
2024	28.1	25.5	56.8
2029	30.0	27.3	59.0
State Diversity Index			2024: 50.5 2029: 52.3

The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).



2024 POPULATION 25+ BY EDUCATIONAL ATTAINMENT

Education	5 Minutes	10 Minutes	20 Minutes
No High School Diploma	6.0%	6.1%	8.2%
High School Grad/GED	42.1%	43.7%	33.9%
Some College/Associate	33.4%	31.4%	28.5%
Bachelor/Grad/Prof	18.4%	18.9%	29.4%



PER CAPITA INCOME

2024 ESTIMATE

5 Minutes	\$31,556
10 Minutes	\$33,939
20 Minutes	\$37,166
State	\$40,752



MEDIAN AGE

2024 ESTIMATE

5 Minutes	35.5
10 Minutes	36.7
20 Minutes	36.9
State	40.5



2024 EMPLOYED

CIVILIAN POPULATION 16+

5 Minutes	98.0%
10 Minutes	97.9%
20 Minutes	96.6%
State	95.6%



2024 EMPLOYMENT BY OCCUPATION

2024 Employed 16+	5 Minutes	10 Minutes	20 Minutes
Total Estimate	3,145	9,520	106,475
- White Collar	50.8%	53.8%	55.5%
- Services	18.8%	14.7%	14.3%
- Blue Collar	30.5%	31.5%	30.2%

LIFESTYLE PROFILE

| SOURCE: ESRI 2024

Esri's Community Tapestry is a geodemographic segmentation system that combines the "who" of lifestyle demography with the "where" of local geography to create a classification with 67 distinct behavioral market segments (**Tapestry Segments**).

PREVALENT TAPESTRY SEGMENTS

5 Minutes—HHs	10 Minutes—HHs	20 Minutes—HHs
Middleburg (4C) 42%	Salt of the Earth (6B) 38%	Middleburg (4C) 17%
Traditional Living (12B) 41%	Middleburg (4C) 28%	Salt of the Earth (6B) 13%
Salt of the Earth (6B) 17%	Traditional Living (12B) 15%	Traditional Living (12B) 12%

Tapestry's 14 **LifeMode groups**—groups of Tapestry segments that share similar demographic characteristics and consumer behavior patterns—offer a broader view of consumer behavior patterns.

PREVALENT TAPESTRY LIFE MODE GROUPS



FAMILY LANDSCAPES

[LM4] | #1 in All Drive Times

5 Minutes	10 Minutes	20 Minutes
HHs Percent	HHs Percent	HHs Percent
945 42.1%	2,884 44.3%	20,786 29.1%

- Successful young families in their first homes
- Non-diverse, prosperous married-couple families, residing in suburban or semirural areas with a low vacancy rate (second lowest)
- Homeowners (79%) with mortgages (second highest %), living in newer single-family homes, with median home value slightly higher than the U.S.
- Two workers in the family, contributing to the second highest labor force participation rate, as well as low unemployment
- Do-it-yourselfers, who work on home improvement projects, as well as their lawns and gardens
- Sports enthusiasts, typically owning newer sedans or SUVs, dogs, and savings accounts/plans, comfortable with the latest technology
- Eat out frequently at fast food or family restaurants to accommodate their busy lifestyle
- Especially enjoy bowling, swimming, playing golf, playing video games, watching movies rented via Redbox, and taking trips to a zoo or theme park



COZY COUNTRY LIVING

[LM6] | #2 in 10/20 Minute Drive

5 Minutes	10 Minutes	20 Minutes
HHs Percent	HHs Percent	HHs Percent
369 16.5%	2,648 40.7%	17,649 24.7%

- Empty nesters in bucolic settings.
- Largest Tapestry group, almost half of households located in the Midwest.
- Homeowners with pets, residing in single-family dwellings in rural areas; almost 30% have 3 or more vehicles and, therefore, auto loans.
- Politically conservative and believe in the importance of buying American
- Own domestic trucks, motorcycles, and ATVs/UTVs.
- Prefer to eat at home, shop at discount retail stores (especially Walmart), bank in person, and spend little time online.
- Own every tool and piece of equipment imaginable to maintain their homes, vehicles, vegetable gardens, and lawns.
- Listen to country music, watch auto racing on TV, and play the lottery; enjoy outdoor activities, such as fishing, hunting, camping, boating, and even bird watching.

Learn more and view complete Tapestry descriptions at the Esri website:
<http://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation.htm>

An understanding of area supply and demand for retail and food and drink establishments, infused with local insights on market forces influencing performance and opportunities in the marketplace, can yield a meaningful assessment of a retail market’s performance and possibilities for growth.

Data sourced from Claritas’ Retail Market Power® (RMP) reports provide a good starting point for:

- Assessing and tracking overall sales volumes and retail performance.
- Identifying market strengths, retail clusters, and possibilities for complementary business types, products, and uses.
- Detecting gaps in the business mix and possible repositioning, expansion, and recruitment opportunities.

Claritas RMP estimates provide a direct comparison between sales by businesses (supply) and consumer spending (potential sales or demand). The resulting difference between supply and demand is expressed as sales surplus or leakage.

SALES SURPLUS AND LEAKAGE ESTIMATES | (\$MM)

Total Retail Trade (NAICS 44 – 45)	5 Minutes	10 Minutes	20 Minutes
- Est. Sales (Supply)	\$159.7M	\$219.6M	\$3429.7M
- Potential Sales (Demand)	\$82.6M	\$180.5M	\$2948.7M
- Est. Surplus/(Leakage)	\$77.1M	\$39.1M	\$481M
Total Food and Drink (NAICS 722)	5 Minutes	10 Minutes	20 Minutes
- Est. Sales (Supply)	\$28.4M	\$32.2M	\$318.3M
- Potential Sales (Demand)	\$12.1M	\$26.5M	\$428.2M
- Est. Surplus/(Leakage)	\$16.3M	\$5.7M	(\$109.9M)
Total Retail, Food and Drink (NAICS 44 – 45, 722)	5 Minutes	10 Minutes	20 Minutes
- Est. Sales (Supply)	\$188.2M	\$251.8M	\$3748M
- Potential Sales (Demand)	\$94.8M	\$207M	\$3376.9M
- Est. Surplus/(Leakage)	\$93.4M	\$44.8M	\$371.1M

Estimates shown in millions and rounded to nearest one hundred thousand dollars.



SUPPLY IS GREATER THAN DEMAND = SALES SURPLUS
A surplus could signal the area is attractive to retailers and offer opportunities for complementary or niche establishments that capitalize on existing strengths, clusters and consumer patterns.



SUPPLY IS LESS THAN DEMAND = SALES LEAKAGE
Sectors showing leakage may help to attract new establishments or reveal changes that could be made to an existing business’ menu or product mix to fill gaps and increase market share.

Source: Claritas Retail Market Power® 2025 by Retail Store Type.

Data Note: The polarity of surplus/leakage estimates and sales gap factors 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 sales are being captured from customers residing outside the defined area.

TOTAL SALES

DOWNTOWN WAYLAND DRIVE TIME AREAS
[Retail Trade (NAICS 44–45) + Food & Drink (NAICS 722)] | Source: Claritas 2025

\$188
MILLION
5 MINUTES

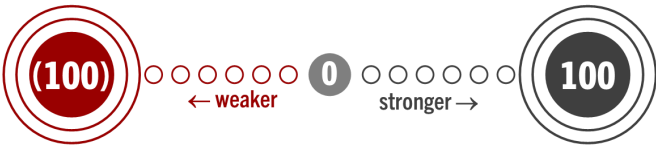
\$252
MILLION
10 MINUTES

\$3.7
BILLION
20 MINUTES

PERFORMANCE BY CATEGORY

Sales gap factors offer a quick look means of assessing the relative strength of retail and food and drink categories for a defined area. The factor is a measure of the relationship between supply and demand that ranges from -100 (total leakage) to 100 (total surplus).

Sales Gap Factors provide a measure of relative strength



- Categories with a positive factor have a surplus of sales. The higher the sales gap factor, the stronger the performance. Categories with the highest factors indicate market strengths.
- Categories with a negative factor have sales leakage. The lower the sales gap factor, the weaker the performance. Categories with the lowest factors could identify business gaps and possibilities for re-positioning or expansion.

SALES GAP FACTORS | DOWNTOWN WAYLAND DRIVE TIME AREAS

Category—Factor	5 Minutes	10 Minutes	20 Minutes
Motor Vehicle and Parts Dealers	68.1	49.4	8.0
Furniture / Home Furnishings Stores	(89.6)	(85.9)	(7.4)
Electronics and Appliance Stores	(94.6)	(97.3)	(20.2)
Building Materials, Garden & Supply	12.6	5.4	23.7
Food and Beverage Stores	32.9	3.2	(25.3)
Health and Personal Care Stores	(23.9)	(37.1)	7.5
Gasoline Stations	16.0	13.8	10.4
Clothing and Clothing Accessories	(75.7)	(85.4)	(49.6)
Sporting Goods, Hobby, Book, Music	(99.8)	(98.9)	(25.8)
General Merchandise Stores	24.0	11.9	21.7
Miscellaneous Store Retailers	(55.9)	(64.7)	7.2
Nonstore Retailers	(32.2)	(48.9)	15.1
Food Services and Drinking Places	40.2	9.8	(14.7)

Source: Claritas Retail Market Power® 2025 by Retail Store Type | Calculations by DPN

See the Categories Detail (provided as a supplement) for sales surplus and leakage figures for more than one hundred retail and food and drink categories and subcategories.

See the supplemental Categories Detail—Page 3 for other important notes, limitations and disclaimers.

DATA SOURCES AND APPLICATIONS

ESRI DEMOGRAPHICS DATA | MARKET PROFILE

Esri's demographics provide decision makers the most current information available to understand and track changes in the population, consumer behavior, and broader market area trends. Information can help inform market strategies by analyzing and assessing:

- How trends in population, households, income, and other variables might impact existing businesses and prospects for growth.
- How changes in daytime population effect commerce, opportunities, and the district’s way of life.
- How housing unit numbers and occupancy trends might influence demand, housing styles, and price points for district housing.
- How changes in age, diversity, and other population traits could effect demand for products and services, menu items, amenities, events, etc.
- How education and employment levels might impact opportunities for business growth and the cost of doing business.

ESRI SEGMENTATION DATA | TAPESTRY SEGMENTATION AREA PROFILE

Esri Tapestry is a geodemographic segmentation system that integrates consumer traits with residential characteristics to identify markets and classify U.S. neighborhoods among 67 distinct market segments. For a broader view of consumer markets, segments are summarized by 14 LifeMode groups — groups of Tapestry segments that share similar demographic characteristics and consumer behavior patterns. Information profiling concentrations of different groups and segments in the marketplace can offer insights useful for:

- Gauging the market’s potential response to business concepts and features such as menu items, products, services, amenities, price points, merchandising techniques, etc.
- Fine-tuning messaging, marketing, and advertising strategies to resonate with and reach intended market segments.
- Programming activities and events that appeal to the lifestyles and preferences of targeted audience members.
- Assessing how current housing styles, preferences, and life stages of different segments could impact district housing opportunities.

CLARITAS | RETAIL MARKET POWER (RMP) OPPORTUNITY GAP DATA

Claritas’ Retail Market Power Opportunity Gap by Retail Store Types report enables users to assess growth strategies by depicting the sales gaps that exist in the marketplace. By using sales estimates to depict supply and geography-based estimates of potential annual consumer expenditures to depict demand, Retail Market Power® enables an opportunity gap (sales surplus and leakage) analysis of the retail environment. The information provides a good starting point for:

- Assessing and tracking overall sales volumes and retail performance.
- Identifying market strengths, retail clusters, and possibilities for complementary business types, products, and uses.
- Detecting gaps in the business mix and possible business repositioning, expansion, and recruitment opportunities.

DIGGING DEEPER | SOURCE REPORTS

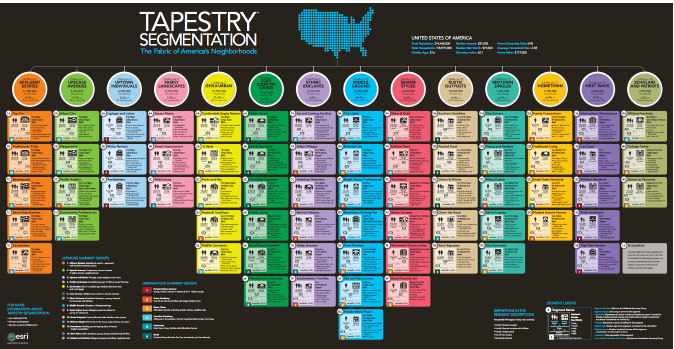
The Market Snapshot summarizes slices of more extensive data contained in source Esri and Claritas reports delivered with your snapshot. For example:

- Esri’s Market Profile report contains in-depth demographic data for hundreds of variables, some dating back to the year 2000.
- Esri’s Tapestry Segmentation Profile report shows the distribution of 67 Tapestry segments with links to detailed descriptions.
- Claritas’ RMP Opportunity Gap data provides sales supply, demand, and opportunity gap/surplus estimates for more than 100 Retail and Food Services and Drinking Places categories and subcategories.



Esri's 2024/2029 release of Updated Demographics uses Census 2020–based geographic boundaries and the most current Census 2020 data available. Select Esri demographic update universes including population, housing, race, and ethnicity have now been rebased using the P.L.94-171 redistricting counts from the initial release of Census 2020 data.

View the [2024/2029 Esri Update Demographics Methodology Statement](#) for more information.



Esri's Tapestry is a market segmentation system designed specifically to understand customers' lifestyle choices—what they buy, how they spend their free time, etc. The system's 67 different segments are grouped into and generalized in 14 LifeMode Groups. Two of your area's most prevalent LifeMode Groups are displayed in your Snapshot. Information identifying and detailing other LifeMode Groups and which of the 67 segments are present in your study area can be accessed using the Esri source reports accompanying your Market Snapshot.

Visit Esri's website to learn more about the [Esri Tapestry Segmentation](#) system.



Your Market Snapshot shows overall sales surplus and leakage estimates derived from Claritas Retail Market Power (RMP) data for the retail and food & drink sectors. Claritas RMP compares Demand and Supply estimates to display an Opportunity Gap (Leakage) or Surplus.

Example	2025 Demand (\$)	2025 Supply (\$)	Opportunity Gap/Surplus (\$)
A.	10,000,000	18,000,000	- 8,000,000
B.	10,000,000	4,000,000	6,000,000

Claritas Retail Market Power Opportunity Gap Report Display Format

Example A shows an instance where Supply (\$18M) exceeds Demand (\$10M) resulting in a surplus of \$8 million (displayed as a negative amount in Claritas RMP reports). In Example B, Demand (\$10M) is greater than Supply (\$4M) resulting in an Opportunity Gap (or Leakage) of \$6 million (shown as a positive figure in Claritas RMP reports).

As indicated in your Snapshot's footnotes, the polarity of the resulting Opportunity Gap/ Surplus figures shown in source Claritas RMP reports has been reversed so that your Market Snapshot shows a Surplus as a positive value, and Leakage as a negative value. The same information is used to calculate the Leakage/Surplus Factor displayed in your Market Snapshot, where leakage values are shown as negative, and surplus as positive.

View or download Environics' [Retail Market Power™ Release Notes](#).



WAYLAND, MICHIGAN



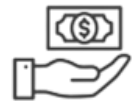
Population

4,935



Households

1,716



Median Household Income

\$65,570



Median Age

34.6 years



Housing Units

1,777



96.6% Housing Units Occupied

67.1% Owner-occupied

29.5% Renter-occupied

POPULATION BY RACE/ETHNICITY | 2024

Total	4,395
- White Alone	87.8%
- Black Alone	1.3%
- American Indian Alone	1.1%
- Asian Alone	0.4%
- Pacific Islander Alone	0.0%
- Some Other Race Alone	1.8%
- Two or More Races	7.5%
Hispanic Origin	5.2%
Diversity Index	30.0

KEY HOUSING INDICATORS | 2024

Median Home Value	\$197,899
Average Spent on Mortgage & Basics	\$9,662
Percentage of Income for Mortgage	18.3%
Housing Affordability Index	131

A **Housing Affordability Index (HAI)** of 100 represents an area that on average has sufficient household income to qualify for a loan on a home valued at the median home price. An index greater than 100 suggests homes are easily afforded by the average area resident. An HAI less than 100 indicates homes are less affordable (and the median income is not enough to purchase a median valued home).

Source: Esri Market Profile | 08.24

POPULATION BY GENERATION [SOURCE: ESRI 2024]



	GREATEST GEN BORN 1945 & EARLIER	BABY BOOMER BORN 1946 TO 1964	GENERATION X BORN 1965 TO 1980
Wayland	3.5%	17.0%	16.6%
Michigan	5.0%	21.3%	19.4%



	MILLENNIAL BORN 1981 TO 1998	GENERATION Z BORN 1999 TO 2016	ALPHA BORN 2017 TO PRESENT
Wayland	25.4%	25.0%	12.6%
Michigan	23.0%	22.5%	8.8%

AVERAGE SALES PER HOUSEHOLD [SOURCE: CLARITAS 2025]

Furniture and Home Furnishings

	Wayland	\$0
	Michigan	\$920

Sporting Goods, Hobby, Book, Music

	Wayland	\$0
	Michigan	\$778

Food and Beverage Stores

	Wayland	\$13,069
	Michigan	\$6,407

General Merchandise Stores

	Wayland	\$10,088
	Michigan	\$9,608

Health and Personal Care Stores

	Wayland	\$1,982
	Michigan	\$3,639

Miscellaneous Store Retailers

	Wayland	\$335
	Michigan	\$1,336

Clothing and Clothing Accessories

	Wayland	\$305
	Michigan	\$1,797

Food Services and Drinking Places

	Wayland	\$17,084
	Michigan	\$7,531

Data Sources: Claritas and Environics 2025. Calculations performed by DPN using Claritas 2025 Pop-Facts Demographic Quick Facts households estimate and Retail Market Power by Retail Store Type supply (sales) estimates for businesses located within Wayland's city limits.

SUPPLEMENT | SALES SURPLUS AND LEAKAGE CATEGORY ESTIMATES | SOURCE: CLARITAS 2025

DOWNTOWN WAYLAND (MI) DRIVE TIME AREAS

		Estimated Sales Surplus/ (Leakage)					
NAICS	Totals	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
44,45,722	Total retail trade including food and drink	93,405,899	33.0	44,813,700	9.8	371,088,268	5.2
44,45	- Total retail trade	77,086,188	31.8	39,067,440	9.8	480,951,880	7.5
NAICS	Motor Vehicle and Parts Dealers	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
441	Motor vehicle and parts dealers	73,755,780	68.1	73,583,660	49.4	107,883,130	8.0
4411	- Automobile dealers	17,413,725	37.2	12,594,786	16.5	(266,345,604)	(34.1)
44111	- - New car dealers	14,271,983	35.1	8,257,468	12.6	(289,632,202)	(44.4)
44112	- - Used car dealers	3,141,742	51.4	4,337,319	40.2	23,286,598	18.0
4412	- Other motor vehicle dealers	52,867,164	96.3	57,603,879	92.9	327,526,656	82.7
44121	- - Recreational vehicle dealers	53,407,238	98.6	58,534,469	97.2	291,915,306	92.0
44122	- - Motorcycle, boat, and other motor vehicle dealers	(540,075)	(75.9)	(930,590)	(51.7)	35,611,351	45.2
441222	- - - Boat dealers	(225,931)	(100.0)	(494,488)	(100.0)	(4,638,366)	(43.8)
441228	- - - Motorcycle, ATV, and all other motor vehicle dealers	(314,143)	(64.7)	(436,102)	(33.4)	40,249,716	59.1
4413	- Automotive parts, accessories, and tire stores	3,474,892	51.4	3,384,993	32.0	46,702,078	28.3
44131	- - Automotive parts and accessories stores	3,593,364	63.4	3,007,500	39.8	21,675,095	22.5
44132	- - Tire dealers	(118,471)	(10.8)	377,494	12.4	25,026,981	36.4
NAICS	Furniture and Home Furnishings Stores	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
442	Furniture and home furnishings stores	(1,364,263)	(89.6)	(2,895,136)	(85.9)	(6,869,797)	(7.4)
4421	- Furniture stores	(708,774)	(81.7)	(1,469,356)	(75.6)	(13,430,755)	(33.3)
4422	- Home furnishings stores	(655,490)	(100.0)	(1,425,780)	(100.0)	6,560,958	12.6
44221	- - Floor covering stores	(262,149)	(100.0)	(571,807)	(100.0)	11,706,907	39.0
44229	- - Other home furnishings stores	(393,341)	(100.0)	(853,973)	(100.0)	(5,145,949)	(23.4)
442291	- - - Window treatment stores	(19,327)	(100.0)	(42,041)	(100.0)	(656,226)	(93.9)
442299	- - - All other home furnishings stores	(374,015)	(100.0)	(811,932)	(100.0)	(4,489,723)	(21.0)
NAICS	Electronics and Appliance Stores	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
443	Electronics and appliance stores	(988,370)	(94.6)	(2,187,574)	(97.3)	(12,097,960)	(20.2)
443141	- Household appliance stores	(212,464)	(78.9)	(494,502)	(89.0)	2,961,590	14.8
443142	- Electronics stores	(775,906)	(100.0)	(1,693,072)	(100.0)	(15,059,550)	(37.7)
NAICS	Building Material and Garden Equipment and Supplies Dealers	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
444	Building material and garden equipment and supplies dealers	1,561,080	12.6	1,365,464	5.4	119,698,640	23.7
4441	- Building material and supplies dealers	732,017	7.2	(1,430,680)	(7.5)	124,224,180	27.1
44411	- - Home centers	(2,520,040)	(100.0)	(5,522,941)	(100.0)	94,761,674	34.6
44412	- - Paint and wallpaper stores	(195,323)	(100.0)	(429,385)	(100.0)	(6,765,386)	(94.1)
44413	- - Hardware stores	1,723	0.2	2,469,954	54.5	27,465,475	45.0
44419	- - Other building material dealers	3,445,657	53.3	2,051,692	23.6	8,762,417	7.5
4442	- Lawn and garden equipment and supplies stores	829,064	36.2	2,796,144	46.8	(4,525,540)	(9.7)
44421	- - Outdoor power equipment stores	502,185	64.3	2,203,483	78.3	6,914,690	41.3
44422	- - Nursery, garden center, and farm supply stores	326,879	21.7	592,661	18.7	(11,440,230)	(38.0)
NAICS	Food and Beverage Stores	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
445	Food and beverage stores	10,690,106	32.9	1,577,990	3.2	(158,309,715)	(25.3)
4451	- Grocery stores	10,567,702	35.0	2,471,969	5.4	(131,467,494)	(22.9)
44511	- - Supermarkets and other grocery (except convenience) stores	8,371,680	30.9	447,655	1.1	(132,438,327)	(24.5)
44512	- - Convenience stores	2,196,022	70.1	2,024,314	49.9	970,833	2.8
4452	- Specialty food stores	(302,073)	(100.0)	(652,001)	(97.4)	(6,854,716)	(46.1)
44521	- - Meat markets	(90,772)	(100.0)	(193,708)	(95.3)	(1,992,904)	(44.1)
44522	- - Fish and seafood markets	(35,719)	(100.0)	(78,145)	(100.0)	(830,081)	(47.8)
44523	- - Fruit and vegetable markets	(63,166)	(100.0)	(138,247)	(100.0)	(2,126,302)	(87.5)
44529	- - Other specialty food stores	(112,416)	(100.0)	(241,902)	(96.8)	(1,905,427)	(30.8)
445299	- - - All other specialty food stores	(52,404)	(100.0)	(110,552)	(93.2)	173,436	4.4
4453	- Beer, wine, and liquor stores	424,477	21.2	(241,978)	(7.6)	(19,987,504)	(56.5)

		Estimated Sales Surplus/ (Leakage)					
NAICS	Health and Personal Care Stores	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
446	Health and personal care stores	(2,064,419)	(23.9)	(6,362,460)	(37.1)	31,392,930	7.5
44611	- Pharmacies and drug stores	(1,207,647)	(15.5)	(4,485,053)	(29.4)	49,161,719	13.1
44612	- Cosmetics, beauty supplies, and perfume stores	(374,358)	(100.0)	(822,955)	(100.0)	(10,147,059)	(59.7)
44613	- Optical goods stores	(183,121)	(100.0)	(396,110)	(100.0)	(874,503)	(7.3)
44619	- Other health and personal care stores	(299,292)	(100.0)	(658,342)	(100.0)	(6,747,228)	(45.0)
446191	- - Food (health) supplement stores	(105,302)	(100.0)	(231,590)	(100.0)	(3,501,117)	(84.5)
446199	- - All other health and personal care stores	(193,990)	(100.0)	(426,752)	(100.0)	(3,246,110)	(29.9)
NAICS	Gasoline Stations	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
447	Gasoline Stations	2,769,115	16.0	5,090,319	13.8	60,606,039	10.4
NAICS	Clothing and Clothing Accessories Stores	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
448	Clothing and clothing accessories stores	(2,875,447)	(75.7)	(6,711,587)	(85.4)	(78,428,921)	(49.6)
4481	- Clothing stores	(1,897,996)	(67.2)	(4,588,654)	(80.0)	(49,729,896)	(42.1)
44811	- - Men's clothing stores	(101,952)	(100.0)	(221,264)	(100.0)	(2,294,737)	(47.7)
44812	- - Women's clothing stores	(250,895)	(53.0)	(592,195)	(60.4)	(10,223,516)	(66.9)
44813	- - Children's and infants' clothing stores	(94,746)	(100.0)	(220,138)	(100.0)	620,647	7.5
44814	- - Family clothing stores	(1,463,857)	(100.0)	(3,200,157)	(100.0)	(33,486,129)	(47.5)
44815	- - Clothing accessories stores	(137,998)	(100.0)	(299,483)	(100.0)	(3,909,593)	(68.0)
44819	- - Other clothing stores	151,454	27.5	(55,417)	(6.8)	(436,569)	(3.2)
4482	- Shoe stores	(401,962)	(100.0)	(875,113)	(100.0)	(12,422,111)	(78.1)
4483	- Jewelry, luggage, and leather goods stores	(575,489)	(100.0)	(1,247,820)	(100.0)	(16,276,913)	(68.1)
44831	- - Jewelry stores	(325,688)	(100.0)	(705,474)	(100.0)	(7,529,090)	(49.7)
44832	- - Luggage and leather goods stores	(249,801)	(100.0)	(542,346)	(100.0)	(8,747,823)	(100.0)
NAICS	Sporting Goods, Hobby, Musical Instrument, and Book Stores	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
451	Sporting goods, hobby, musical instrument, and book stores	(1,087,462)	(99.8)	(2,373,261)	(98.9)	(15,876,801)	(25.8)
4511	- Sporting goods, hobby, and musical instrument stores	(948,451)	(99.8)	(2,068,973)	(98.8)	(13,595,138)	(25.1)
45111	- - Sporting goods stores	(651,289)	(99.7)	(1,417,149)	(98.2)	(6,335,943)	(15.8)
45112	- - Hobby, toy, and game stores	(228,945)	(100.0)	(503,004)	(100.0)	(5,971,878)	(56.9)
45113	- - Sewing, needlework, and piece goods stores	(28,777)	(100.0)	(62,844)	(100.0)	(1,015,400)	(100.0)
45114	- - Musical instrument and supplies stores	(39,440)	(100.0)	(85,976)	(99.7)	(271,917)	(10.6)
4512	- Book stores and news dealers	(139,011)	(100.0)	(304,288)	(100.0)	(2,281,663)	(30.2)
451211	- - Book stores	(132,041)	(100.0)	(289,048)	(100.0)	(2,377,472)	(34.1)
451212	- - News dealers and newsstands	(6,969)	(100.0)	(15,241)	(100.0)	95,809	16.2
NAICS	General Merchandise Stores	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
452	General merchandise stores	6,489,273	24.0	6,065,170	11.9	203,796,278	21.7
4522	- Department stores	(612,766)	(100.0)	(1,339,458)	(100.0)	(15,053,187)	(52.8)
4523	- Other general merchandise stores	7,102,039	26.9	7,404,627	14.9	218,849,465	24.1
452311	- - Warehouse clubs and supercenters	6,785,158	27.7	7,250,062	15.8	212,110,906	25.1
452319	- - All other general merchandise stores	316,882	16.6	154,566	4.2	6,738,559	10.6
NAICS	Miscellaneous Store Retailers	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
453	Miscellaneous store retailers	(1,418,657)	(55.9)	(3,364,413)	(64.7)	10,649,162	7.2
4531	- Florists	(90,931)	(100.0)	(38,993)	(10.9)	(2,398,621)	(59.8)
4532	- Office supplies, stationery, and gift stores	(215,646)	(57.5)	(556,976)	(76.4)	(2,488,417)	(13.6)
45321	- - Office supplies and stationery stores	(81,389)	(100.0)	(177,643)	(100.0)	2,232,469	27.9
45322	- - Gift, novelty, and souvenir stores	(134,257)	(45.7)	(379,333)	(68.8)	(4,720,887)	(45.9)
4533	- Used merchandise stores	(270,562)	(100.0)	(518,878)	(79.7)	(2,822,510)	(17.6)
4539	- Other miscellaneous store retailers	(841,519)	(46.7)	(2,249,567)	(65.1)	18,358,710	16.7
45391	- - Pet and pet supplies stores	(429,927)	(100.0)	(924,403)	(100.0)	(7,762,811)	(35.4)
45392	- - Art dealers	(169,271)	(91.5)	(288,008)	(60.3)	(5,577,321)	(82.3)
45393	- - Manufactured (mobile) home dealers	(108,592)	(100.0)	(237,666)	(100.0)	3,185,946	30.4
45399	- - All other miscellaneous store retailers	(133,729)	(12.4)	(799,491)	(44.0)	28,512,898	40.3
453991	- - - Tobacco stores	(227,558)	(100.0)	(486,440)	(100.0)	(5,030,190)	(47.2)
453998	- - - All other miscellaneous store retailers (except tobacco stores)	93,829	11.0	(313,051)	(23.5)	33,543,088	55.9

NAICS	Non-store Retailers	Estimated Sales Surplus/ (Leakage)					
		5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
454	Non-store retailers	(8,380,550)	(32.2)	(24,720,731)	(48.9)	218,508,897	15.1
4541	- Electronic shopping and mail-order houses	(8,659,754)	(36.6)	(24,889,071)	(54.4)	227,245,620	16.5
4542	- Vending machine operators	(98,041)	(100.0)	(214,549)	(100.0)	179,466	2.5
4543	- Direct selling establishments	377,245	16.7	382,889	8.5	(8,916,190)	(15.2)
45431	- - Fuel dealers	282,641	18.2	306,560	9.9	(4,707,405)	(11.4)
45439	- - Other direct selling establishments	94,604	13.5	76,329	5.4	(4,208,785)	(24.2)
NAICS	Food Services and Drinking Places	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
722	Food services and drinking places	16,319,711	40.2	5,746,259	9.8	(109,863,612)	(14.7)
7223	- Special food services	(756,254)	(83.4)	(1,550,160)	(74.7)	(21,496,497)	(58.2)
72231	- - Food service contractors	(583,822)	(79.5)	(1,173,368)	(69.1)	(18,127,121)	(64.4)
72232	- - Caterers	(155,646)	(100.0)	(340,110)	(100.0)	(2,775,182)	(33.7)
72233	- - Mobile food services	(16,786)	(100.0)	(36,683)	(100.0)	(594,195)	(100.0)
7224	- Drinking places (alcoholic beverages)	504,987	38.1	136,853	7.1	(7,136,361)	(33.3)
7225	- Restaurants and other eating places	16,570,978	43.2	7,159,568	13.1	(81,230,752)	(11.8)
722511	- - Full-service restaurants	3,815,120	25.9	(781,023)	(3.4)	(26,794,742)	(7.5)
722513	- - Limited-service restaurants	12,794,716	58.2	8,716,699	30.3	(42,682,526)	(15.1)
722514	- - Cafeterias, grill buffets, and buffets	346,707	59.7	303,413	37.2	(1,283,505)	(18.3)
722515	- - Snack and non-alcoholic beverage bars	(385,566)	(37.6)	(1,079,523)	(53.8)	(10,469,979)	(26.5)

Source: Claritas 2025 Retail Market Power® by Retail Store Type

Provider: Environics Analytics | U.S. Census Bureau | U.S. Bureau of Labor Statistics | Data Axle

Sales Gap Factor calculations by DPN

Retail Market Power (RMP): RMP focuses on Retail Trade NAICS codes 44 and 45, as well as the Food Services industry NAICS code 722. RMP can help retailers and real estate analysts understand the supply and demand characteristics of any area. Using supply estimates derived from retail sales data and demand estimates derived from consumer expenditures, the database presents a net gap between supply and demand to assess opportunities in your current or potential new trade areas. Developed using the Census of Retail Trade from the U.S. Census Bureau and the Consumer Expenditure Survey from the U.S. Bureau of Labor Statistics, the database offers current-year supply and demand estimates, as well as five-year demand projections, for all standard census, postal, marketing geographies or custom trade areas such as radii or drive times. The 2025 update transitioned to a model that fully aligns with Monthly Retail Trade Survey (MRTS) data, and consistent with projected controls for Consumer Buying Power (CBP), for better transparency and accuracy. This model improvement eliminates the blending of multiple data sources that was previously used. View or download Environics' [Retail Market Power™ Release Notes](#).

Sales Surplus and Leakage Estimates: The polarity of surplus/leakage estimates shown in this summary document (as compared to those shown in source Claritas Retail Market Power by Retail Stores 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.
- Conversely, in categories where demand exceeds supply, an opportunity gap - or sales leakage - exists and could indicate possibilities for attracting new retail operations or informing 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 factor represents a surplus of retail sales and can be indicative of a market where customers are drawn from outside the defined 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 indicate sales leakage is occurring and might offer an initial indication of gaps in the business mix and potential targets for re-positioning, expansion, or recruitment.

