



Where the Gulf Coast Begins



MARKET SNAPSHOT

Foley Main Street, Inc., with support from the City of Foley and community partners, is taking a pro-active approach to planning for the future prosperity of Downtown Foley. Ongoing efforts, including initiatives inspired by the Envision Downtown Foley Strategy Plan created in 2022, are serving to heighten the appeal of Downtown Foley as a place to work, visit, live, do business, and invest. A holistic approach to revitalization is sparking a new wave of activity and strengthening Downtown Foley as a local and regional attraction, economic engine, and center for commerce.

This Market Snapshot, produced in tandem with a review and update to the Envision Downtown Foley Market Study, highlights local and regional demographic, lifestyle and retail data. The update provides a fresh viewpoint helpful to evaluating the market, identifying potential opportunities, and fine-tuning Foley Main Street development and district enhancement strategies.



FOLEY MAIN STREET, INC.

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Foley is a Main Street Alabama community.

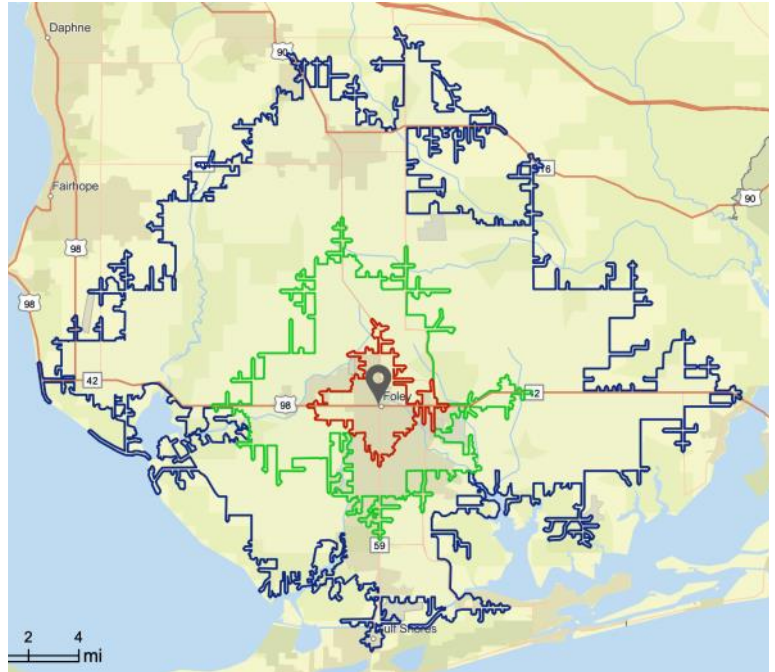
Main Street Alabama is focused on bringing jobs, dollars and people back to Alabama's historic communities. Economic development is at the heart of this statewide organization's efforts to revitalize downtowns and neighborhoods across the state.



Downtown Foley Drive Time Market

Demographic Fast Facts

[Source: Esri 2025]



POPULATION	5 Minutes	10 Minutes	20 Minutes
2010 Total	8,120	19,950	60,416
2020 Total	9,855	25,439	78,751
2025 Estimate	10,769	28,222	88,056
2030 Projection	11,889	31,966	99,119
Growth (2025-30)	10.4%	13.3%	12.6%
Projected State Population Growth (2025-30)			1.8%



2025 DAYTIME POP	5 Minutes	10 Minutes	20 Minutes
Total Daytime Population	15,659	31,734	79,946
Workers	9,381	16,533	34,025
Residents	6,278	15,201	45,921
Daytime Change	45.4%	12.4%	-9.2%



HOUSEHOLDS	5 Minutes	10 Minutes	20 Minutes
2010 Total	3,301	7,961	24,226
2020 Total	3,896	10,309	31,949
2025 Estimate	4,305	11,907	36,860
2030 Projection	4,837	13,773	42,314
Growth (2025-30)	12.4%	15.7%	14.8%
Projected State Households Growth (2025-30)			3.2%



MEDIAN HH INCOME	5 Minutes	10 Minutes	20 Minutes
2025 Estimate	\$60,866	\$67,531	\$70,234
2030 Projection	\$65,760	\$74,250	\$77,596
Growth (2025-30)	8.0%	9.9%	10.5%
2025 State Median HH: \$65,622			2025-30 State Growth: 13.4%



HOUSING UNITS	5 Minutes	10 Minutes	20 Minutes
2025 Estimate	4,843	13,712	42,744
- Owner Occupied	55.6%	60.0%	61.8%
- Renter Occupied	33.3%	26.8%	24.5%
- Vacant	11.1%	13.2%	13.8%
Estimated State Percent Vacant (2025)			12.2%



POPULATION BY RACE/ETHNICITY—DIVERSITY	5 Minutes	10 Minutes	20 Minutes
Diversity Index			
2010	56.4	48.7	37.1
2020	60.1	52.5	44.6
2025	60.6	53.9	46.1
2030	62.4	55.7	48.2
State Diversity Index	2025: 58.0	2030: 59.5	

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).



2025 POPULATION 25+ BY EDUCATIONAL ATTAINMENT	5 Minutes	10 Minutes	20 Minutes
Education			
No High School Diploma	12.5%	10.1%	8.2%
High School Grad/GED	36.9%	33.8%	32.7%
Some College/Associate	28.2%	29.5%	32.9%
Bachelor/Grad/Prof	22.3%	26.5%	26.2%



PER CAPITA INCOME

2025 ESTIMATE

5 Minutes	\$30,197
10 Minutes	\$35,440
20 Minutes	\$38,588
State	\$36,547



MEDIAN AGE

2025 ESTIMATE

5 Minutes	42.9
10 Minutes	44.2
20 Minutes	43.5
State	40.2



2025 EMPLOYED

CIVILIAN POPULATION 16+

5 Minutes	93.9%
10 Minutes	94.3%
20 Minutes	95.9%
State	95.9%



2025 EMPLOYMENT BY OCCUPATION	5 Minutes	10 Minutes	20 Minutes
2025 Employed 16+			
Total Estimate	4,546	13,180	42,732
- White Collar	52.6%	54.5%	57.5%
- Services	24.0%	20.9%	18.7%
- Blue Collar	23.4%	24.6%	23.8%

Esri's ArcGIS Tapestry is a geodemographic segmentation system that combines the "who" of lifestyle demography with the "where" of local geography to create a classification with 60 distinct behavioral market segments (**Tapestry Segments**).

Decision makers can use the Tapestry system to learn how consumers spend their time and their money, what communities are interested in, and anticipate their marketplace behavior.



DOMINANT TAPESTRY SEGMENTS

LOYAL LOCALS (K3) LIFE MODE GROUP K: **SUBURBAN SHINE**

Senior Midwestern and Southern suburbanites in stable growth areas.

Households—5 Minutes	Households—10 Minutes	Households—20 Minutes
1,333 31.0%	3,132 26.3%	5,619 15.2%

Key Statistics	
Median Age	46.4
Median HH Income	\$77,226
Median Net Worth	\$291,287
Bachelor's Degree +	33.9%
Median Home Value	\$255,205
Homeownership Rate	78.2%
Pct. In Labor Force	57.5%
Unemployment Rate	3.5%

- Lifestyle Patterns
- When it comes to shopping, they often visit large retail establishments for food and home supplies.
 - This segment tends to stick to the same foods, stores, and brands. They often buy American-made products and domestic vehicles.
 - Television is a primary source for both news and entertainment, including programs related to hunting and sports.
 - They use social media to follow groups and stay in touch with friends and family.

SOUTHERN SATELLITES (I6) LIFE MODE GROUP I: **COUNTRYSAPES**

Suburban, low-cost areas with long commutes and diverse ages.

Households—5 Minutes	Households—10 Minutes	Households—20 Minutes
31 0.7%	1,206 10.1%	8,576 23.3%

Key Statistics	
Median Age	41.5
Median HH Income	\$72,167
Median Net Worth	\$254,904
Bachelor's Degree +	20.1%
Median Home Value	\$260,137
Homeownership Rate	81.9%
Pct. In Labor Force	59.4%
Unemployment Rate	4.1%

- Lifestyle Patterns
- Residents shop at discount and hardware stores for essentials such as children's clothes, shoes, and books. They tend to shop online for pet and hobby supplies.
 - Dining out typically happens at chain restaurants and fast-food establishments.
 - For entertainment, residents read physical copies of hunting and fishing magazines and follow college football and auto racing on TV.
 - These individuals tend to spend time outside. Common activities include camping trips, fishing, hunting, and gardening, and residents often travel

Visit Esri's website to learn more about [Tapestry LifeMode Groups and Segments](#)

Claritas’ Retail Market Power® (RMP) data can help retailers and real estate analysts understand the supply and demand characteristics of any area, and provide a good starting point for:

- Assessing and tracking sales volume 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.

Understanding Area Supply and Demand Estimates

RMP compares estimates of sales by businesses (supply) and consumer expenditures (demand) within any given geography.

Demand (\$): Total dollars spent by all consumers and businesses in the defined trade area, regardless of where the dollars were spent.

Supply (\$): The total aggregate sales by businesses located within the defined trade area.

Calculating Sales Surplus and Leakage

Supply - Demand = Sales Surplus or Sales Leakage

The resulting difference between supply and demand is expressed as sales surplus or sales leakage.

➤ Sales Surplus (+): Supply is greater than Demand

A retail surplus appears when sales (supply) exceed expenditures (demand). In this case, local retailers are likely attracting expenditures from consumers and areas outside the defined trade area. A surplus could signal the area is attractive to retailers and offer opportunities for complementary or niche establishments that capitalize on existing market strengths, business clusters, and common consumer traits.

➤ Sales Leakage (-): Demand is greater than Supply

Sales leakage appears when expenditure levels for a specific geography are higher than the corresponding sales estimates. 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.

Sales Gap Factors

Sales gap factors provide a quick-look means of assessing the relative strength of retail and food and drink categories for a defined area based on a range of -100 (total leakage) to 100 (total surplus).

- + Categories with a positive factor show 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 show 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.

RMP data is best used as a first step in assessing the potential for growth, and when local knowledge is infused to better understand what might be driving the results.

Source: Claritas Retail Market Power® 2026 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 expenditures (Demand) and 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 Retail Trade (NAICS 44 – 45)	5 Minutes	10 Minutes	20 Minutes
Supply (estimated sales)	\$521.8M	\$1176.0M	\$1848.2M
– Demand (est. expenditures)	\$171.5M	\$518.0M	\$1736.8M
= Surplus or (Leakage)	\$350.3M	\$658.0M	\$111.3M
Total Food and Drink (NAICS 722)	5 Minutes	10 Minutes	20 Minutes
Supply (estimated sales)	\$61.8M	\$135.3M	\$291.3M
– Demand (est. expenditures)	\$24.8M	\$75.6M	\$253.6M
= Surplus or (Leakage)	\$37.1M	\$59.7M	\$37.7M
Total Retail, Food and Drink (NAICS 44 – 45, 722)	5 Minutes	10 Minutes	20 Minutes
Supply (estimated sales)	\$583.6M	\$1311.3M	\$2139.4M
– Demand (est. expenditures)	\$196.3M	\$593.6M	\$1990.4M
= Surplus or (Leakage)	\$387.4M	\$717.7M	\$149.0M

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

SALES GAP FACTORS | DOWNTOWN FOLEY DRIVE TIME AREAS

Category—Factor	5 Minutes	10 Minutes	20 Minutes
Motor Vehicle and Parts Dealers	27.5	30.1	(2.3)
Building Materials, Garden & Supply	70.9	64.2	35.6
Food and Beverage Retailers	63.2	34.5	1.6
Furniture and Home Furnishings	29.0	0.4	(3.0)
Electronics and Appliance Retailers	(71.6)	(71.7)	(65.0)
General Merchandise Retailers	56.2	48.4	0.9
Health and Personal Care Retailers	30.7	2.0	(20.7)
Gasoline Stations and Fuel Dealers	60.4	49.6	24.7
Clothing and Clothing Accessories	63.7	56.5	12.5
Sporting Goods, Hobby, Music Instr	25.2	37.9	(0.0)
Book Retailers and News Dealers	32.9	0.9	15.4
Florists	62.3	17.2	(4.8)
Office Supply, Stationery and Gifts	38.8	21.1	(25.9)
Used Merchandise Retailers	53.4	21.9	(13.8)
Other Miscellaneous Retailers	(21.2)	(31.8)	(62.4)
Food Services and Drinking Places	42.8	28.3	6.9

Source: Claritas Retail Market Power® 2026 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 & drink categories and subcategories.

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

A USER’S GUIDE TO YOUR MARKET SNAPSHOT

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 60 distinct market segments. For a broader view of consumer markets, segments are summarized by 12 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

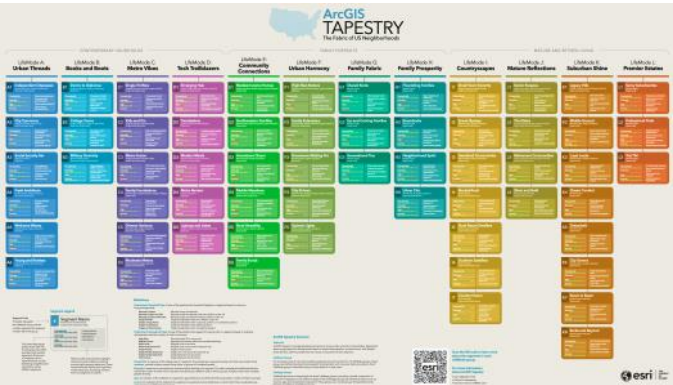
The Market Snapshot summarizes slices of more extensive data contained in source Esri and Claritas reports delivered with your snapshot. For example:

- 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 provides an Updated Demographics advanced demographics dataset for the United States. This dataset is developed by Esri and includes source material supplied by the U.S. Census Bureau, the U.S. Census Bureau's American Community Survey, and public and private data sources.

View the [2025/2030 Esri Update Demographics Methodology Statement](#) for more info.



Esri’s ArcGIS 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 60 different segments are grouped into and generalized in 12 LifeMode Groups. Two of your area’s most dominant Tapestry Segments or LifeMode Groups are summarized in your Snapshot. Information identifying and detailing other LifeMode Groups and which of the 60 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 [ArcGIS Tapestry](#).



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	2026 Demand (\$)	2026 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](#).



Foley, Alabama

City Profile



Population¹
28,043



Households¹
11,293



Median Household Income¹
\$66,336



Median Age²
45.8 years



Housing Units²
12,789



66.5% Owner Occupied Units
33.9% Renter Occupied Units
15.7% Vacant Housing Units



\$9,658
Average Spent on
Mortgage & Basics²



27.4%
Percent of Income
for Mortgage²



\$291,413
Median Home Value²



90
Housing Affordability
Index²

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).

Sources: ¹ U.S. Census Bureau Population Estimates, 2024
² Esri Market Profile, 2025

POPULATION BY GENERATION [SOURCE: ESRI 2025]



	GREATEST GEN BORN 1945 & EARLIER	BABY BOOMER BORN 1946 TO 1964	GENERATION X BORN 1965 TO 1980
Foley (city)	6.3%	22.9%	18.3%
Alabama	4.3%	20.2%	19.4%



	MILLENNIAL BORN 1981 TO 1998	GENERATION Z BORN 1999 TO 2016	ALPHA BORN 2017 TO PRESENT
Foley (city)	22.0%	20.0%	10.5%
Alabama	22.9%	22.9%	10.2%

AVERAGE SALES PER HOUSEHOLD [SOURCE: CLARITAS 2026]

Furniture and Home Furnishings

	Foley (city)	\$1,788
	Alabama	\$924

Sporting Goods, Hobby, Book, Music

	Foley (city)	\$1,723
	Alabama	\$834

Food and Beverage Retailers

	Foley (city)	\$12,108
	Alabama	\$6,133

General Merchandise Retailers

	Foley (city)	\$24,521
	Alabama	\$11,577

Health and Personal Care Retailers

	Foley (city)	\$4,801
	Alabama	\$4,751

Miscellaneous Store Retailers

	Foley (city)	\$1,542
	Alabama	\$1,227

Clothing and Clothing Accessories

	Foley (city)	\$9,648
	Alabama	\$2,149

Food Services and Drinking Places

	Foley (city)	\$11,749
	Alabama	\$6,885

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 Foley's city limits.

SUPPLEMENT | SALES SURPLUS AND LEAKAGE CATEGORY ESTIMATES | SOURCE: CLARITAS 2026

DOWNTOWN FOLEY (AL) DRIVE TIME AREAS

		Estimated Sales Surplus/ (Leakage) Sales Gap Factor					
NAICS	Totals	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
44,45,722	Total retail trade including food and drink	387,362,072	49.7	717,732,643	37.7	149,043,921	3.6
44,45	- Total retail trade	350,295,236	50.5	658,006,831	38.8	111,340,714	3.1
NAICS	Motor Vehicle and Parts Dealers	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
441	Motor vehicle and parts dealers	33,654,423	27.5	115,461,057	30.1	(20,442,792)	(2.3)
4411	- Automobile dealers	22,190,254	22.6	100,640,998	30.5	(128,695,213)	(20.0)
44111	-- New car dealers	22,755,964	25.0	104,409,971	33.7	(106,119,204)	(18.1)
44112	-- Used car dealers	(565,711)	(7.8)	(3,768,973)	(18.9)	(22,576,009)	(39.7)
4412	- Other motor vehicle dealers	58,417	1.1	625,933	3.7	89,670,841	62.3
44121	-- Recreational vehicle dealers	1,053,117	35.0	238,775	3.8	37,741,439	65.4
44122	-- Motorcycle, boat, and other motor vehicle dealers	(994,700)	(44.2)	387,158	3.7	51,929,402	60.3
441222	--- Boat dealers	(283,529)	(35.7)	3,059,273	47.5	59,486,949	84.1
441228	--- Motorcycle, ATV, and all other motor vehicle dealers	(711,173)	(48.9)	(2,672,114)	(65.7)	(7,557,547)	(49.0)
4413	- Automotive parts, accessories, and tire retailers	11,405,753	60.5	14,194,125	38.5	18,581,580	19.6
44131	-- Automotive parts and accessories retailers	8,825,704	63.2	9,185,039	37.0	12,763,534	19.5
44132	-- Tire dealers	2,580,049	52.7	5,009,086	41.5	5,818,046	19.7
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	56,141,575	70.9	127,093,591	64.2	132,193,052	35.6
4441	- Building material and supplies dealers	55,287,179	73.4	122,115,637	66.4	111,342,574	34.8
44411	-- Home centers	21,330,887	66.9	65,545,086	66.8	38,130,249	25.8
44412	-- Paint and wallpaper retailers	(169,936)	(28.4)	2,422,614	51.0	3,940,553	33.2
44413	-- Hardware retailers	4,459,911	68.9	4,705,696	43.2	20,737,026	50.0
44419	-- Other building material dealers	29,666,318	81.6	49,442,240	70.5	48,534,744	40.9
4442	- Lawn and garden equipment and supplies retailers	854,396	22.3	4,977,955	35.1	20,850,478	40.4
44421	-- Outdoor power equipment retailers	(307,483)	(100.0)	1,525,838	44.3	11,968,861	65.2
44422	-- Nursery, garden center, and farm supply retailers	1,161,880	33.0	3,452,117	32.1	8,881,616	26.7
NAICS	Food and Beverage Retailers	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
445	Food and beverage retailers	77,983,287	63.2	71,622,458	34.5	7,293,332	1.6
4451	- Grocery and convenience retailers	69,439,613	63.6	62,133,443	34.4	8,905,150	2.2
44511	-- Supermarkets and other grocery retailers (except convenience)	69,977,358	64.9	63,664,985	36.1	13,336,824	3.4
44513	-- Convenience retailers and vending machine operators	(537,746)	(39.8)	(1,531,541)	(37.1)	(4,431,674)	(30.5)
445131	--- Convenience retailers	(353,329)	(30.2)	(1,015,182)	(28.6)	(3,499,534)	(29.7)
445132	--- Vending machine operators	(184,417)	(100.0)	(516,360)	(89.0)	(932,139)	(33.9)
4452	- Specialty food retailers	1,709,093	43.6	1,452,771	18.1	(1,405,299)	(6.8)
44523	-- Fruit and vegetable retailers	(109,779)	(100.0)	(326,297)	(100.0)	(1,093,565)	(100.0)
44524	-- Meat retailers	1,551,496	72.7	2,290,801	57.0	260,836	4.3
44525	-- Fish and seafood retailers	247,179	56.3	380,678	40.0	4,185,789	68.5
44529	-- Other specialty food retailers	20,198	1.6	(892,412)	(32.7)	(4,758,359)	(64.3)
445291	--- Baked goods retailers	(43,725)	(100.0)	(130,096)	(100.0)	(438,224)	(100.0)
445292	--- Confectionery and nut retailers	88,582	38.5	(49,971)	(13.5)	(410,791)	(41.2)
445298	--- All other specialty food retailers	(24,659)	(2.6)	(712,345)	(32.0)	(3,909,345)	(65.5)
4453	- Beer, wine, and liquor retailers	6,834,582	66.1	8,036,244	42.0	(206,520)	(0.6)
NAICS	Furniture, Home Furnishings, Electronics & Appliance Retailers	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
449	Furniture, home furnishings, electronics, and appliance retailers	91,074	0.5	(11,269,972)	(25.1)	(38,683,858)	(26.0)
4491	- Furniture and home furnishings retailers	3,839,068	29.0	129,186	0.4	(2,804,605)	(3.0)
44911	-- Furniture retailers	4,311,443	48.8	2,729,207	16.4	1,799,337	3.8
44912	-- Home furnishings retailers	(472,375)	(10.8)	(2,600,021)	(20.9)	(4,603,942)	(10.1)
449121	--- Floor covering retailers	387,177	21.7	562,495	11.5	2,637,532	15.5
449122	--- Window treatment retailers	(117,196)	(100.0)	(368,317)	(100.0)	(846,374)	(52.2)
449129	--- All other home furnishings retailers	(742,356)	(29.7)	(2,794,200)	(38.8)	(6,395,099)	(23.7)
4492	- Electronics and appliance retailers	(3,747,995)	(71.6)	(11,399,157)	(71.7)	(35,879,252)	(65.0)

SUPPLEMENT | SALES SURPLUS AND LEAKAGE CATEGORY ESTIMATES | DOWNTOWN FOLEY (AL) DRIVE TIME AREAS

		Estimated Sales Surplus/ (Leakage) Sales Gap Factor					
NAICS	General Merchandise Retailers	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
455	General merchandise retailers	82,087,962	56.2	180,557,519	48.4	5,656,207	0.9
4551	- Department stores	(167,602)	(6.8)	(1,357,214)	(20.6)	(1,081,723)	(4.2)
4552	- Warehouse clubs, supercenters, and other general merchandise	82,255,564	57.2	181,914,732	49.6	6,737,930	1.1
455211	-- Warehouse clubs and supercenters	(19,268,292)	(100.0)	(57,641,731)	(100.0)	(193,447,078)	(100.0)
455219	-- All other general merchandise retailers	101,523,856	81.6	239,556,463	77.6	200,185,008	46.3
NAICS	Health and Personal Care Retailers	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
456	Health and personal care retailers	15,374,777	30.7	2,111,436	2.0	(60,618,926)	(20.7)
45611	- Pharmacies and drug retailers	7,040,688	19.5	(14,966,260)	(20.4)	(64,225,863)	(27.8)
45612	- Cosmetics, beauty supplies, and perfume retailers	3,891,185	59.6	9,102,472	53.3	46,036	0.2
45613	- Optical goods retailers	4,167,018	84.8	7,918,381	77.5	9,657,349	55.3
45619	- Other health and personal care retailers	275,886	10.6	56,844	0.8	(6,096,447)	(34.5)
456191	-- Food (health) supplement retailers	30,515	2.6	276,872	7.4	(2,043,530)	(21.4)
456199	-- All other health and personal care retailers	245,371	17.1	(220,028)	(6.5)	(4,052,918)	(50.1)
NAICS	Gasoline Stations and Fuel Dealers	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
457	Gasoline stations and fuel dealers	44,982,896	60.4	86,349,719	49.6	96,373,344	24.7
4571	-Gasoline stations	45,497,121	61.5	87,386,277	50.8	97,860,582	25.7
45711	-- Gasoline stations with convenience stores	43,612,566	67.5	86,262,624	58.0	112,352,840	34.9
45712	-- Other gasoline stations	1,884,555	20.3	1,123,653	4.9	(14,492,258)	(24.4)
4572	- Fuel dealers	(514,225)	(100.0)	(1,036,558)	(48.7)	(1,487,238)	(16.4)
NAICS	Clothing, Clothing Accessories, Shoe, and Jewelry Retailers	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
458	Clothing, clothing accessories, shoe, and jewelry retailers	35,195,746	63.7	78,417,883	56.5	28,963,359	12.5
4581	- Clothing and clothing accessories retailers	22,302,201	59.6	48,713,758	51.8	11,258,564	6.9
4582	- Shoe retailers	11,600,226	82.5	30,507,621	80.7	24,326,650	49.9
4583	- Jewelry, luggage, and leather goods retailers	1,293,319	34.0	(803,497)	(11.7)	(6,621,854)	(34.8)
45831	-- Jewelry retailers	1,195,242	36.6	(935,287)	(17.2)	(5,234,667)	(32.7)
45832	-- Luggage and leather goods retailers	98,076	18.3	131,790	9.0	(1,387,187)	(46.6)
NAICS	Sporting Goods, Hobby, Musical Instrument, Book, Misc Retailers	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
459	Sporting goods, hobby, musical instrument, book, misc. retailers	4,783,494	20.0	7,663,139	11.7	(39,393,004)	(25.6)
4591	- Sporting goods, hobby, and musical instrument retailers	1,850,962	25.2	10,083,603	37.9	(26,883)	(0.0)
45911	-- Sporting goods retailers	1,861,814	34.2	5,142,955	32.2	(1,379,825)	(4.0)
45912	-- Hobby, toy, and game retailers	164,272	10.8	4,618,477	53.5	2,464,410	15.5
45913	-- Sewing, needlework, and piece goods retailers	12,072	6.1	80,261	12.4	(452,599)	(31.2)
45914	-- Musical instrument and supplies retailers	(187,195)	(100.0)	241,910	17.7	(658,870)	(21.4)
4592	- Book retailers and news dealers	282,226	32.9	16,111	0.9	1,078,752	15.4
4593	- Florists	871,099	62.3	342,977	17.2	(250,325)	(4.8)
4594	- Office supplies, stationery, and gift retailers	1,777,610	38.8	2,275,968	21.1	(5,851,751)	(25.9)
45941	-- Office supplies and stationery retailers	(759,180)	(100.0)	552,242	10.7	(3,417,443)	(28.5)
45942	-- Gift, novelty, and souvenir retailers	2,536,790	66.3	1,723,725	30.6	(2,434,308)	(22.9)
4595	- Used merchandise retailers	1,473,873	53.4	1,106,190	21.9	(1,606,957)	(13.8)
4599	- Other miscellaneous retailers	(1,472,278)	(21.2)	(6,161,709)	(31.8)	(32,735,840)	(62.4)
45991	-- Pet and pet supplies retailers	1,014,957	32.8	2,073,678	24.7	(4,698,994)	(28.8)
45993	-- Manufactured (mobile) home dealers	(288,111)	(100.0)	(891,083)	(100.0)	(2,187,578)	(59.4)
45992+99	-- All other miscellaneous retailers and art dealers	(2,199,123)	(61.8)	(7,344,304)	(72.9)	(25,849,267)	(79.5)
459991	--- Tobacco, electronic cigarette, and other smoking supplies	(232,994)	(14.9)	(1,263,340)	(32.0)	(5,581,183)	(46.8)
45999+20	--- All other misc. retailers & art dealers (except tobacco retailers)	(1,966,129)	(98.5)	(6,080,965)	(99.2)	(20,268,084)	(98.6)

NAICS	Food Services and Drinking Places	Estimated Sales Surplus/ (Leakage) Sales Gap Factor					
		5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
722	Food services and drinking places	37,066,835	42.8	59,725,811	28.3	37,703,207	6.9
7223	- Special food services	(1,705,864)	(100.0)	(5,157,434)	(100.0)	(10,462,708)	(43.1)
72231	- - Food service contractors	(1,233,028)	(100.0)	(3,647,978)	(100.0)	(5,809,707)	(30.9)
72232	- - Caterers	(390,285)	(100.0)	(1,257,318)	(100.0)	(3,806,822)	(83.1)
72233	- - Mobile food services	(82,552)	(100.0)	(252,138)	(100.0)	(846,180)	(100.0)
7224	- Drinking places (alcoholic beverages)	148,914	7.4	(384,101)	(7.2)	(5,968,341)	(45.2)
7225	- Restaurants and other eating places	38,623,785	46.6	65,267,347	32.6	54,134,256	10.7
722511	- - Full-service restaurants	34,547,633	61.9	76,441,169	54.0	90,001,080	29.2
722513	- - Limited-service restaurants	2,546,221	11.7	(13,927,989)	(31.0)	(33,242,933)	(20.3)
722514	- - Cafeterias, grill buffets, and buffets	707,297	69.9	1,609,651	63.4	2,257,264	41.9
722515	- - Snack and non-alcoholic beverage bars	822,635	19.6	1,144,517	10.0	(4,881,154)	(16.5)

Source: Claritas 2026 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.

