



Downtown Zebulon Retail Marketplace Snapshot- February of 2025

The purpose of this report is to give Downtown Zebulon the baseline information for a better understanding of its current market. The NC Main Street & Rural Planning Center Staff studied the retail marketplace date within a 5- mile radius of and 20- minute drive time to the downtown area. The retail leakage analysis examines the quantitative aspects of the retail opportunities.

By reviewing the retail gap, we can:

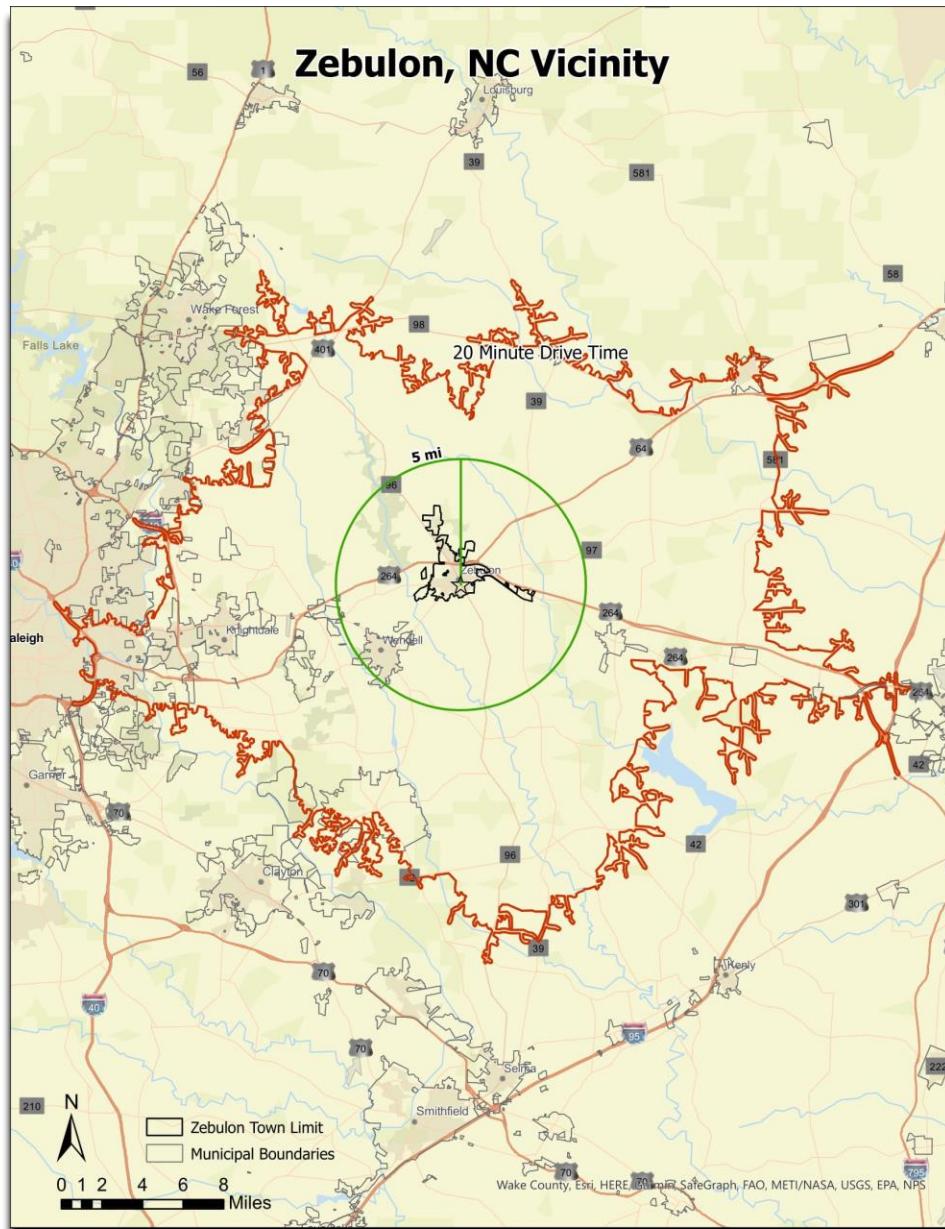
- Understand how well the retail needs of residents are being met
- Uncover unmet demand and possible opportunities
- Understand the strengths and weaknesses of the local retail sector

When consumers spend their dollars outside the specific radii of Downtown Zebulon this is known as “Retail Gap” throughout this report. Retail Gap or leakage indicates an **unmet demand in the trade area**. This suggests the possibility the community can support additional retail for those business categories. Residents within the specified primary trade areas are purchasing products outside that area indicating opportunity to capture those dollars within the downtown district.

There are also categories for which Downtown Zebulon exceeds the local market demand. Those are measured as red numbers on the report below. For the 5-mile radius information, this means that Downtown Zebulon is exceeding its market potential in these categories. Similarly, for the red numbers in the 20-minute drive time area, the consumer demand exceeds what the market should sustain. This retail surplus means the community’s trade area is capturing local market plus attracting non-local shoppers. Surplus means the community has possibly developed strong clusters of retail that have broad geographical appeal.

You can also seek additional retail market data that Wake County Economic Development or the Triangle J Council of Governments can provide. This report is based on the data collected and should serve as a starting point for your economic vitality efforts.

We highly encourage you to couple this report with consumer surveys to get a complete understanding of the Downtown Zebulon potential. The NC Main Street and Rural Planning Center can share examples of consumer surveys and assist with this process as needed.



The above Wake County map outlines the two trade areas within a 5-mile radius of and within a 20-minute drive time to downtown. Defining the downtown trade area is critical in determining retail opportunities for the downtown market. The NC Main Street & Rural Center staff only

reviewed the data within these two segments. Downtown Zebulon should be targeting residents within these two areas. The goal is to capture the retail sales volume leaking to neighboring communities, such as Raleigh or Wilson. The chart below shows total industry summaries for the 5-mile and 20-minute drive time to downtown. It details the total retail sales gap, potential 10% capture and retail square footage needed to attract this sales volume.

The sales per square foot column in the charts is the average number based on recent research across the state. Typically, restaurant annual retail sales are higher than \$300 per square foot. There are variables that impact this number such as building owned versus rented, rental rates either higher or lower as well as overall expenses, such as employee wages, insurance, utilities, etc. **Surplus is shown as a red number and retail gap is shown as a black number.**

Distance	Total Retail Gap	10% Capture	Sales/SF	S.F. Needed
5-mile radius	\$109,095,803	\$10,909,580	\$300	36,365
20-Minute Drive Time	\$518,295,262	\$51,829,525	\$300	172,765

The above chart shows the aggregate number of potential sales within the 5-mile radius and 20-minute drive-time from Downtown Zebulon. Below you will see these numbers broken down by retail category.

5-Mile Radius Around Downtown

Zebulon					
Primary Trade Area 5-mile around downtown		DOWNTOWN POTENTIAL			
Business Type	Retail Gap	10% of Retail Gap	Sales/SF	SF	
		10%	\$300	Needed	
Furniture Stores	\$ 3,258,884	\$ 325,888	\$ 300	1,086	
Home Furnishings Stores	\$ 3,304,524	\$ 330,452	\$ 300	1,102	
Appliance Stores	\$ 1,952,049	\$ 195,205	\$ 300	651	
Electronics Stores	\$ 5,712,650	\$ 571,265	\$ 300	1,904	
Home Centers	\$ 17,274,466	\$ 1,727,447	\$ 300	5,758	
Paint and Wallpaper Stores	\$ 1,676,540	\$ 167,654	\$ 300	559	
Hardware Stores	\$ 3,403,878	\$ 340,388	\$ 300	1,135	
Nursery, Garden and Farm Supply Stores	\$ 2,029,397	\$ 202,940	\$ 300	676	
Grocery Stores	\$ 499,082	\$ 49,908	\$ 300	166	
Specialty Food Stores	\$ 2,384,049	\$ 238,405	\$ 300	795	
Beer, Wine and Liquor Stores	\$ 2,838,158	\$ 283,816	\$ 300	946	
Pharmacies and Drug Stores	\$ 17,386,578	\$ 1,738,658	\$ 300	5,796	
Cosmetics and Beauty Supply Stores	\$ 2,601,761	\$ 260,176	\$ 300	867	
Men's Clothing Stores	\$ 707,054	\$ 70,705	\$ 300	236	
Women's Clothing Stores	\$ 1,149,042	\$ 114,904	\$ 300	383	
Children's and Infants' Clothing Stores	\$ 859,524	\$ 85,952	\$ 300	287	
Family Clothing Stores	\$ 8,888,836	\$ 888,884	\$ 300	2,963	
Clothing Accessories Stores	\$ 992,061	\$ 99,206	\$ 300	331	
Shoe Stores	\$ 1,696,613	\$ 169,661	\$ 300	566	
Luggage and Leather Goods Stores	\$ 1,993,555	\$ 199,356	\$ 300	665	
Sporting Goods Stores	\$ 1,517,418	\$ 151,742	\$ 300	506	
Book Stores	\$ 1,011,098	\$ 101,110	\$ 300	337	
Department Stores	\$ 3,580,098	\$ 358,010	\$ 300	1,193	
Florists	\$ 564,043	\$ 56,404	\$ 300	188	
Office and Stationary Stores	\$ 630,573	\$ 63,057	\$ 300	210	
Gift, Novelty and Souvenir Stores	\$ 1,198,945	\$ 119,895	\$ 300	400	
Used Merchandise Stores	\$ 855,944	\$ 85,594	\$ 300	285	
Drinking Places	\$ 2,443,073	\$ 244,307	\$ 300	814	
Full Service Restaurants	\$ 1,900,870	\$ 190,087	\$ 300	634	
Limited-Service Restaurants	\$ 14,785,040	\$ 1,478,504	\$ 300	4,928	
Total Gap	\$ 109,095,803	\$ 10,909,580	\$ 300	36,365	

20-Minute Drive Time from Downtown

Zebulon					
Primary Trade Area 20-Minute Drive Time		DOWNTOWN POTENTIAL			
Business Type	Retail Gap	10% of Retail Gap	Sales/SF	SF	
		10%	\$300	Needed	
Furniture Stores	\$ 19,776,478	\$ 1,977,647	\$ 300	6,592	
Home Furnishing Stores	\$ 13,635,411	\$ 1,363,541	\$ 300	4,545	
Appliance Stores	\$ 5,761,469	\$ 576,147	\$ 300	1,920	
Electronics Stores	\$ 22,228,466	\$ 2,222,847	\$ 300	7,409	
Paint and Wallpaper Stores	\$ 6,738,753	\$ 673,875	\$ 300	2,246	
Hardware Stores	\$ 12,084,770	\$ 1,208,477	\$ 300	4,028	
Nursery, Garden Center and Farm Supply Stores	\$ 11,027,027	\$ 1,102,703	\$ 300	3,676	
Grocery Stores	\$ 105,911,244	\$ 10,591,124	\$ 300	35,304	
Specialty Food Stores	\$ 9,736,349	\$ 973,635	\$ 300	3,245	
Beer, Wine and Liquor Stores	\$ 17,497,381	\$ 1,749,738	\$ 300	5,832	
Pharmacies and Drug Stores	\$ 76,816,734	\$ 7,681,673	\$ 300	25,606	
Cosmetics and Beauty Stores	\$ 10,702,203	\$ 1,070,220	\$ 300	3,567	
Men's Clothing Stores	\$ 2,967,449	\$ 296,745	\$ 300	989	
Women's Clothing Stores	\$ 8,671,310	\$ 867,131	\$ 300	2,890	
Children's and Infants' Clothing Stores	\$ 3,765,275	\$ 376,528	\$ 300	1,255	
Family Clothing Stores	\$ 43,408,760	\$ 4,340,876	\$ 300	14,470	
Clothing Accessories Stores	\$ 4,510,316	\$ 451,032	\$ 300	1,503	
Shoe Stores	\$ 7,433,210	\$ 743,321	\$ 300	2,478	
Jewelry Stores	\$ 6,634,535	\$ 663,454	\$ 300	2,212	
Luggage and Leather Goods Stores	\$ 8,371,742	\$ 837,174	\$ 300	2,791	
Sporting Goods Stores	\$ 5,608,725	\$ 560,873	\$ 300	1,870	
Hobby, Toy and Game Stores	\$ 3,214,889	\$ 321,489	\$ 300	1,072	
Book Stores	\$ 4,095,010	\$ 409,501	\$ 300	1,365	
Department Stores	\$ 17,619,855	\$ 1,761,986	\$ 300	5,873	
Florists	\$ 2,206,191	\$ 220,619	\$ 300	735	
Office Supplies and Stationary Stores	\$ 1,454,938	\$ 145,494	\$ 300	485	
Gift, Novelty and Souvenir Stores	\$ 4,728,088	\$ 472,809	\$ 300	1,576	
Used Merchandise Stores	\$ 5,747,057	\$ 574,706	\$ 300	1,916	
Drinking Places	\$ 12,026,560	\$ 1,202,656	\$ 300	4,009	
Full Service Restaurants	\$ 63,915,067	\$ 6,391,507	\$ 300	21,305	
Total Gap	\$ 518,295,262	\$ 51,829,525	\$ 300	172,765	

5-Mile Radius Retail Surplus

Category	Retail Surplus
None	

20-Minute Drive Time Retail Surplus

Category	Retail Surplus
Home Centers	\$ 27,967,625
Limited-Service Restaurants	\$ 111,730,121

The retail surpluses confirm that Downtown Zebulon is attracting a disproportionate amount of retail sales in these categories and potential exists to attract additional retail and restaurant establishments to take advantage of the additional business potential.

Below are two tables showing the projected sales growth in different commercial categories. This information can help your recruitment process.

5-Mile Measurement

Zebulon Demand Growth by Retail Store Types					
Business Type	Primary Trade Area: 5 Mile Radius	2025	2030	Growth	Compound Growth
		Demand	Demand	\$	Rate (%)
Furniture Stores	\$ 6,286,956	\$ 7,717,962	\$ 1,431,007		4
Home Furnishing Stores	\$ 5,076,662	\$ 6,194,217	\$ 1,117,555		4
Appliance Stores	\$ 1,952,049	\$ 2,391,261	\$ 439,211		4
Electronics Stores	\$ 5,958,348	\$ 7,305,216	\$ 1,346,868		4
Home Centers	\$ 20,192,990	\$ 24,962,251	\$ 4,769,261		4
Paint and Wallpaper Stores	\$ 1,676,540	\$ 2,107,262	\$ 430,722		5
Hardware Stores	\$ 3,745,175	\$ 4,633,274	\$ 888,099		4
Nursery, Garden and Farm Supply Stores	\$ 4,240,476	\$ 5,233,574	\$ 993,099		4
Grocery Stores	\$ 73,180,780	\$ 88,435,442	\$ 15,254,662		4
Specialty Food Stores	\$ 2,400,813	\$ 2,904,491	\$ 503,678		4
Beer, Wine and Liquor Stores	\$ 5,962,441	\$ 7,312,514	\$ 1,350,073		4
Pharmacies and Drug Stores	\$ 31,605,457	\$ 37,135,912	\$ 5,530,455		3
Cosmetics and Beauty Supply Stores	\$ 2,643,835	\$ 3,106,784	\$ 462,950		3
Women's Clothing Stores	\$ 3,408,046	\$ 3,718,101	\$ 310,055		2
Family Clothing Stores	\$ 12,059,108	\$ 13,192,150	\$ 1,133,042		2
Shoe Stores	\$ 3,109,609	\$ 3,348,713	\$ 329,104		2
Jewelry Stores	\$ 2,646,093	\$ 3,004,560	\$ 358,467		3
Luggage and Leather Goods Stores	\$ 1,993,555	\$ 2,174,243	\$ 180,689		2
Sporting Goods Stores	\$ 4,817,788	\$ 5,717,487	\$ 899,699		3
Hobby, Toy and Game Stores	\$ 1,773,253	\$ 2,165,872	\$ 392,619		4
Book Stores	\$ 1,011,098	\$ 1,206,178	\$ 195,080		4
Department Stores	\$ 4,953,331	\$ 5,431,094	\$ 477,763		2
Florists	\$ 728,105	\$ 900,400	\$ 172,296		4
Office Supplies and Stationary Stores	\$ 630,573	\$ 755,530	\$ 124,957		4
Gift, Novelty and Souvenir Stores	\$ 1,622,437	\$ 1,878,346	\$ 255,909		3
Used Merchandise Stores	\$ 2,246,555	\$ 2,522,523	\$ 275,968		2
Pet and Pet Supplies Stores	\$ 2,630,502	\$ 3,212,456	\$ 581,953		4
Drinking Places	\$ 3,181,162	\$ 3,858,902	\$ 677,740		4
Full Service Restaurants	\$ 43,942,993	\$ 52,538,624	\$ 8,595,631		4
Limited Service Restaurants	\$ 37,300,803	\$ 44,449,639	\$ 7,148,836		4
Total Sales	\$ 292,977,533	\$ 349,514,978	\$ 56,627,448		

Note: The compound annual growth rate (CAGR) is the annualized average rate of revenue growth between two given years, assuming growth takes place at an exponentially compounded rate. The most important factor in both charts is the amount of projected growth per category.

20-Minute Measurement

Zebulon Demand Growth by Retail Store Types					
Primary Trade Area 20-Minute Drive Time		2025	DOWNTOWN POTENTIAL		Compound Growth
Business Type		2025	2030	Growth	Growth
		Demand	Demand	\$	Rate (%)
Furniture Stores		\$ 26,239,802	\$ 31,905,028	\$ 5,665,226	4
Home Furnishings Stores		\$ 21,200,993	\$ 25,580,689	\$ 4,379,696	4
Appliance Stores		\$ 8,169,164	\$ 9,889,335	\$ 1,720,171	4
Electronics Stores		\$ 24,988,596	\$ 30,238,686	\$ 5,250,090	4
Home Centers		\$ 84,660,580	\$ 103,428,486	\$ 18,767,906	4
Paint and Wallpaper Stores		\$ 7,018,807	\$ 8,741,194	\$ 1,722,387	5
Hardware Stores		\$ 15,702,706	\$ 19,199,209	\$ 3,496,503	4
Nursery, Garden and Farm Supply Stores		\$ 17,765,553	\$ 21,681,003	\$ 3,915,451	4
Grocery Stores		\$ 308,739,728	\$ 368,225,836	\$ 59,486,107	4
Specialty Food Stores		\$ 10,136,701	\$ 12,103,201	\$ 1,966,500	4
Beer, Wine and Liquor Stores		\$ 24,988,459	\$ 30,294,284	\$ 5,305,825	4
Pharmacies and Drug Stores		\$ 132,537,597	\$ 153,682,692	\$ 21,145,096	3
Cosmetics and Beauty Supplies		\$ 11,087,242	\$ 12,857,500	\$ 1,770,258	3
Men's Clothing Stores		\$ 2,967,449	\$ 3,173,595	\$ 206,146	1
Women's Clothing Stores		\$ 14,305,130	\$ 15,450,373	\$ 1,145,243	2
Family Clothing Stores		\$ 50,838,789	\$ 54,934,777	\$ 4,095,988	2
Clothing Accessories Stores		\$ 4,731,968	\$ 5,087,252	\$ 355,284	1
Shoe Stores		\$ 12,730,132	\$ 13,941,801	\$ 1,211,669	2
Jewelry Stores		\$ 11,046,909	\$ 12,419,334	\$ 1,342,425	2
Luggage and Leather Goods Stores		\$ 8,371,742	\$ 9,029,660	\$ 657,918	2
Sporting Goods Stores		\$ 20,340,563	\$ 23,870,729	\$ 3,530,167	3
Hobby, Toy and Game Stores		\$ 7,453,933	\$ 8,983,686	\$ 1,529,754	4
Book Stores		\$ 4,248,930	\$ 5,003,218	\$ 754,288	3
Department Stores		\$ 20,868,741	\$ 22,597,400	\$ 1,728,660	2
Florists		\$ 3,053,086	\$ 3,735,002	\$ 681,916	4
Office Supplies and Stationary Stores		\$ 2,649,600	\$ 3,134,778	\$ 485,177	3
Gift, Novelty and Souvenir Stores		\$ 6,799,576	\$ 7,771,386	\$ 971,810	3
Used Merchandise Stores		\$ 9,400,367	\$ 10,408,473	\$ 1,008,106	2
Pet and Pet Supplies Stores		\$ 10,957,976	\$ 13,231,590	\$ 2,273,613	4
Drinking Places		\$ 13,324,024	\$ 15,984,370	\$ 2,660,346	4
Full Service Restaurants		\$ 184,374,960	\$ 217,947,987	\$ 33,573,027	3
Limited Service Restaurants		\$ 156,581,566	\$ 184,471,132	\$ 27,889,567	3
Total Sales		\$ 1,238,281,369	\$ 1,459,003,686	\$ 220,692,320	

Note: The compound annual growth rate (CAGR) is the annualized average rate of revenue growth between two given years, assuming growth takes place at an exponentially compounded rate. The most important factor in both charts is the amount of projected growth per category.

Zebulon Demographics (Source: U.S. Census)

		<u>Zebulon</u>	<u>Wake County</u>	<u>NC</u>	<u>U.S.</u>
Population	2023	9,401	1,190,275	10,835,491	
	2020	6,913	1,129,352	10,439,459	
	+/-	+35.9%	+5.3%	+3.7%	

	<u>Zebulon</u>	<u>Wake County</u>	<u>NC</u>	<u>U.S.</u>
Retail Sales				
Per Capita (2022*)	\$35,562	\$26,260	\$19,567	\$20,928
Zebulon is.....		35.4% higher	81.7% higher	69.9% higher
Median HH Income	\$58,940	\$101,763	\$69,904	\$78,538
Poverty Rate	12.2%	7.2%	12.8%	11.1%

*The latest data on the U.S. Census Quickfacts report—updated every 5 years.



(U.S. Census on the map)

- 4,473 workers enter Zebulon daily for employment.
- 196 workers both live and work in Zebulon daily.
- 3,054 workers exit Zebulon daily for employment.
 - 46% more workers enter Zebulon daily for employment than exit.
 - These are potential downtown consumers.

The above data can be used to help recruit businesses to Downtown Zebulon to meet the unmet potential and reduce the retail gap or leakage. The priorities are to first retain, then expand and finally to recruit new businesses. The categories that show the most potential should be focused on first, especially within the 5-mile radius of downtown. This data can help existing businesses realize there may be potential to expand to capture additional retail sales.

Tapestry Segmentation identified by ESRI On-Line Business Analyst

We find that studying the Tapestry Segments helps to identify a retail mix based on demographics that could enhance the shopping experience. Tapestry Segmentations provide detailed descriptions of America's neighborhoods. U.S. residential areas are divided into 67 distinctive segments based on their socioeconomic and demographic composition, then further classifies the segments into LifeMode and Urbanization Groups. Each radius has numerous LifeMode groups for a total of 100%. The detailed information can give Downtown Zebulon a sense of who its customer is and insight into how to market to and what types of products to possibly add to existing inventory. By diving deeper into each Tapestry Segment's LifeMode and Urbanization Group there may be an entirely new business that could emerge and possibly be a good fit for downtown.

The information provided reflects the U.S. characteristics. The table below shows the top three segments for each category with brief descriptions. Detailed descriptions are obtained by going to the raw ESRI data's Tapestry information and clicking on each segment for the specific drive times. Visit <http://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation>

Top 3 Tapestries for each location

Total Community		5-mile radius		20-minute drive time
Southern Satellites	39.7%	Southern Satellites	33.3%	Middleburg 27.9%
Middleburg	23.8%	Middleburg	31.6%	Southern 20.8%
Urban Edge Families	13.8%	Green Acres	10.6%	Satellites
				Up & Coming 18.3% Families

Southern Satellites is the top segment for the total Zebulon community and for those living within a 5-mile radius, as well as those living within a 20-minute drive time of downtown. Middleburg is the second largest segment for those living within the total Zebulon community and those living within a 5-mile radius of downtown and the largest segment of those living within a 20-minute drive time of downtown. Urban Edge Families is the third largest segment of those living within the entire Zebulon community. Each of these three segments will be addressed below:

Southern Satellites	Total Households (U.S.)	3,856,800
	Average Household Size	2.67
	Median Age	40.3
	Average HH Income	\$47,800

WHO ARE WE?

Southern Satellites is the second largest market found in rural settlements but within metropolitan areas located primarily in the South. This market is typically slightly older, settled married-couple families, who own their homes. Two-thirds of the homes are single-family structures; almost a third are mobile homes. Median household income and home value are below average. Workers are employed in a variety of industries, such as manufacturing, health care, retail trade, and construction, with higher proportions in mining and agriculture than the US. Residents enjoy country living, preferring outdoor activities and DIY home projects.

Middleburg

Total Households (U.S.)	3,511,200
Average Household Size	2.75
Median Age	36.1
Average HH Income	\$59,800

WHO ARE WE?

Middleburg neighborhoods transformed from the easy pace of country living to semi-rural subdivisions in the last decade, as the housing boom spread beyond large metropolitan cities. Residents are traditional, family-oriented consumers. Still more country than rock and roll, they are thrifty but willing to carry some debt and are already investing in their futures. They rely on their smartphones and mobile devices to stay in touch and pride themselves on their expertise. They prefer to buy American and travel in the US. This market is younger but growing in size and assets.

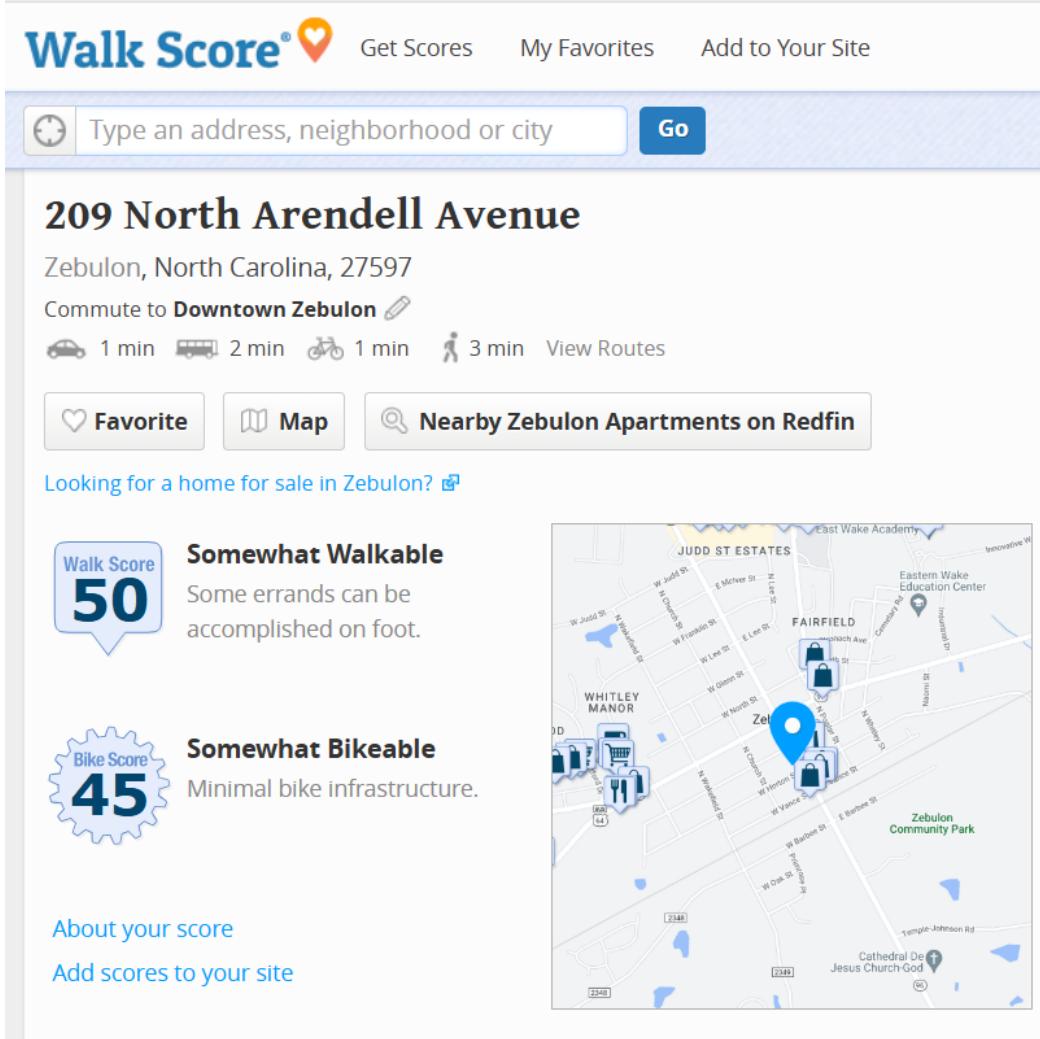
Urban Edge Families

Total Households (U.S.)	1,824,900
Average Household Size	3.19
Median Age	32.5
Average HH Income	\$50,900

WHO ARE WE?

Located throughout the South and West, most Urban Edge Families residents own their own homes, primarily single-family housing—out of the city, where housing is more affordable. Median household income is slightly below average. Most households include younger married couple families with children and, frequently, grandparents. Many residents are born foreign. Spending is focused more on the members of the household than the home. Entertainment includes multiple televisions, movie rentals, and video games at home or visits to theme parks and zoos. This market is connected and adept at accessing what they want from the internet.

Walkscore



Visit <https://www.walkscore.com> for more information.

Summary and Recommendations

1. Retail Gap

At both the 5-mile radius and 20 minute drive time measurements, retail gaps are seen in furniture, home furnishings, appliances, electronics, paint and wallpaper, hardware, nursery and garden, groceries, specialty foods, beer, wine and liquor, pharmacies and drug stores, cosmetics and beauty supplies, men's clothing, women's clothing, children's and infants' clothing, family clothing, clothing accessories, shoes, luggage and leather goods, sporting goods, books, department stores, florists, office supplies, gifts, novelties and souvenirs, used merchandise, drinking places and full-service restaurants. At only the 5-mile radius, retail gaps are seen in home centers, and limited-service restaurants. At only the 20-minute drive time measurement, retail gaps are seen in jewelry and hobbies, toys and games.

2. Retail Surplus

At the 5-mile radius measurement, no retail surpluses are seen. At just the 20-minute drive time measurement, retail surpluses are seen in home centers and limited-service restaurants.

3. Intersection of Retail Gap and Projected Sales Growth

Downtown Zebulon Retail Gaps and Projected Sales Growth 2025-2030				
Category	Retail Gaps		Projected Growth	
	5-Mile Radius	20-Minute Drive Time	5-Mile Radius	20-Minute Drive Time
	\$3,258,884	\$19,776,478	\$1,431,077	\$5,665,226
Furniture	\$3,304,524	\$13,635,411	\$1,117,555	\$4,379,696
Home Furnishings	\$1,952,049	\$5,761,469	\$439,211	\$1,720,171
Appliances	\$5,712,650	\$22,228,466	\$1,346,868	\$5,250,090
Electronics	\$1,676,540	\$6,738,753	\$439,722	\$1,722,387
Paint and Wallpaper	\$3,403,878	\$12,084,770	\$888,099	\$3,496,503
Hardware	\$2,029,397	\$11,027,027	\$993,099	\$3,915,451
Nursery and Garden	\$499,082	\$105,911,244	\$15,254,662	\$59,486,107
Groceries	\$2,384,049	\$9,736,349	\$503,678	\$1,966,500
Specialty Foods	\$2,838,158	\$17,497,381	\$1,350,073	\$5,305,825
Beer, Wine and Liquor	\$17,386,578	\$76,816,734	\$5,530,455	\$21,145,096
Pharmacies	\$2,606,761	\$10,702,203	\$462,950	\$1,770,258
Cosmetics and Beauty Supplies	\$707,054	\$2,967,449		\$206,146
Men's Clothing	\$1,149,042	\$8,671,310	\$310,055	\$1,145,243
Women's Clothing	\$8,888,836	\$43,408,760	\$1,133,042	\$4,095,988
Family Clothing	\$1,696,613	\$7,433,210	\$329,104	\$1,211,669
Shoes		\$6,634,535	\$358,467	\$1,342,425
Jewelry		\$3,214,889	\$392,619	\$1,529,754
Hobbies, Toys and Games	\$1,993,555	\$8,371,742	\$180,689	\$657,918
Luggage and Leather Goods	\$1,517,418	\$5,608,725	\$889,699	\$3,530,167
Sporting Goods	\$1,011,098	\$4,095,010	\$195,080	\$754,288
Books	\$3,580,098	\$17,619,855	\$477,763	\$1,728,660
Department Stores	\$564,043	\$2,206,191	\$172,296	\$681,916
Florists	\$630,043	\$1,454,938	\$124,957	\$485,177
Office Supplies	\$1,198,945	\$4,728,088	\$255,909	\$971,810
Gift, Novelty and Souvenir	\$855,944	\$5,747,057	\$275,968	\$1,008,106
Used Merchandise	\$2,443,073	\$12,026,560	\$677,740	\$2,660,346
Drinking Places	\$1,900,870	\$63,915,067	\$8,595,631	\$33,573,027
Full-Service Restaurants	\$14,785,400		\$7,148,836	\$27,889,567
Limited-Service Restaurants				

Combining current retail gap with projected sales growth will give prospective business owners more confidence in the prospects of success in Downtown Zebulon.

4. Walkability and Bikeability

The Downtown Zebulon Walkscore of 50 is average. Concerning bikeability, Downtown Zebulon scores below average at 45. You will want to work with the local NCDOT division to incorporate bike lanes into their downtown streets as well as those controlled by the Town of Zebulon.

According to a study by real estate advising company Robert Charles Lesser & Co., homebuyers are increasingly looking for green space and trail systems for walking, running, and biking. In fact, green space and trail systems were the No. 1 and No. 2 desirable community features in this referenced article---Source: New Home Source:

<https://www.newhomesource.com/learn/top-community-amenities/>

The list is below:

Parks and green spaces

Paved trail systems for walking, jogging, biking, etc.

Note that in addition to the walking and biking trail amenities, the #3 amenity that new homeowners want is:

Main street village centers with retail services and cafes for gathering and socializing

Downtown Zebulon fits the #3 desired community amenity and will want to see ways to increase walkability and biking options to meet consumer demands.

5. Business Resources

Former Main Street Director Diane Young created the Downtown Directors' Guide to Working with Development Projects--<https://www.ncmainstreetandplanning.com/economic-vitality>-- an invaluable resource for downtown revitalization. Hilary Greenburg of Greenburg Development Services has created business recruitment and retention guides. They are both available on the Main Street and Rural Planning Center web site. All these resources are recommended.

There is additional Claritas retail data and the U.S. Census Quickfacts report to support your retail recruitment efforts.

If you have any questions concerning the above information, do not hesitate to contact me at mike.dougherty@commerce.nc.gov or 919-923-6645.

Sources: Claritas Retail Data

<http://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation>

Wake County map—Glen Locascio, NC Department of Commerce