

# DOWNTOWN HOWELL

HOWELL, MICHIGAN



## MARKET SNAPSHOT

Howell Main Street Inc. and community partners are taking a proactive approach to planning for the future prosperity of Downtown Howell. Ongoing efforts are serving to heighten the appeal of Downtown Howell 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 Howell 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 Howell Main Street Inc. enhancement strategies; and for benchmarking and tracking changes in the market and possible implications for Downtown Howell.



Howell Main Street Inc. | (517) 545-4240 | [downtownhowell.org](http://downtownhowell.org)



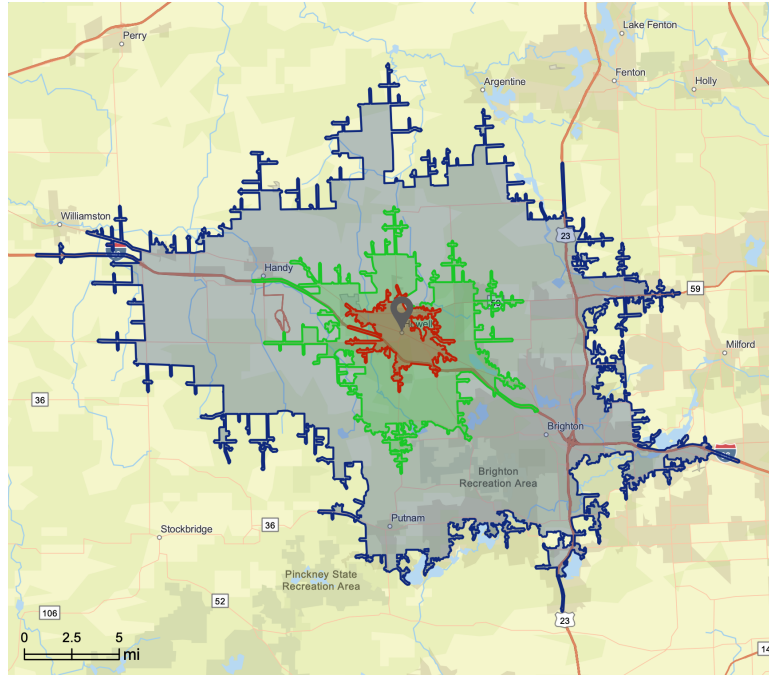
### Howell is a Michigan Main Street community.

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.

DOWNTOWN HOWELL DRIVE TIME MARKET

## DEMOGRAPHIC FAST FACTS | SOURCE: ESRI 2024



POPULATION	5 Minutes	10 Minutes	20 Minutes
2010 Total	15,095	33,477	135,629
2020 Total	16,616	38,525	145,964
2024 Estimate	16,855	39,296	150,090
2029 Projection	17,002	39,705	152,426
Growth (2024-29)	0.9%	1.0%	1.6%

*i* Projected State Population Growth (2024-29) -0.4%



2024 DAYTIME POP	5 Minutes	10 Minutes	20 Minutes
Total Daytime Population	19,278	39,395	136,095
Workers	11,615	21,067	64,569
Residents	7,663	18,328	71,526
Daytime Change	14.4%	0.3%	-9.3%



HOUSEHOLDS	5 Minutes	10 Minutes	20 Minutes
2010 Total	6,210	12,939	50,714
2020 Total	7,128	15,483	56,163
2024 Estimate	7,304	15,991	58,510
2029 Projection	7,479	16,445	60,641
Growth (2024-29)	2.4%	2.8%	3.6%

*i* Projected State Households Growth (2024-29) 1.4%



MEDIAN HH INCOME	5 Minutes	10 Minutes	20 Minutes
2024 Estimate	\$72,156	\$90,913	\$103,484
2029 Projection	\$81,830	\$102,813	\$114,325
Growth (2024-29)	13.4%	13.1%	10.5%

*i* 2024 State Median HH: \$71,476 | 2024-29 Growth: 15.0%

# MARKET TRAITS

| SOURCE: ESRI 2024



HOUSING UNITS	5 Minutes	10 Minutes	20 Minutes
2024 Estimate	7,682	16,668	61,186
- Owner Occupied	62.0%	73.9%	81.6%
- Renter Occupied	33.1%	22.0%	14.0%
- Vacant	4.9%	4.1%	4.4%

Estimated State Percent Vacant (2024) 11.3%



## POPULATION BY RACE/ETHNICITY—DIVERSITY

Diversity Index	5 Minutes	10 Minutes	20 Minutes
2010	14.9	12.6	10.6
2020	25.1	22.3	20.7
2024	26.4	23.4	22.0
2029	28.1	25.0	23.6

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	4.9%	3.6%	3.6%
High School Grad/GED	29.0%	25.3%	24.6%
Some College/Associate	34.0%	33.9%	31.0%
Bachelor/Grad/Prof	32.1%	37.1%	40.9%



## PER CAPITA INCOME

2024 ESTIMATE

5 Minutes	\$40,258
10 Minutes	\$46,639
20 Minutes	\$51,461
State	\$40,752



## MEDIAN AGE

2024 ESTIMATE

5 Minutes	39.3
10 Minutes	40.8
20 Minutes	42.6
State	40.5



## 2024 EMPLOYED

CIVILIAN POPULATION 16+

5 Minutes	95.0%
10 Minutes	96.0%
20 Minutes	96.5%
State	95.6%



## 2024 EMPLOYMENT BY OCCUPATION

2024 Employed 16+	5 Minutes	10 Minutes	20 Minutes
Total Estimate	9,241	21,158	79,174
- White Collar	63.2%	65.0%	66.5%
- Services	17.1%	16.3%	14.0%
- Blue Collar	19.8%	18.7%	19.5%

# 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	
<a href="#">Old and Newcomers (8F)</a>	21%	<a href="#">Green Acres (6A)</a>	35%	<a href="#">Green Acres (6A)</a>	30%
<a href="#">Green Acres (6A)</a>	20%	<a href="#">Workday Drive (4A)</a>	15%	<a href="#">Workday Drive (4A)</a>	19%
<a href="#">Metro Fusion (11C)</a>	20%	<a href="#">Metro Fusion (11C)</a>	11%	<a href="#">Savvy Suburbanites (1D)</a>	11%

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 LIFEMODE GROUPS



### MIDDLE GROUND [LM8] | #1 in 5 Minutes

5 Minutes		10 Minutes		20 Minutes	
HHs	Percent	HHs	Percent	HHs	Percent
3,050	41.8%	3,070	19.2%	4,016	6.9%

- Lifestyles of thirtysomethings.
- Millennials in the middle: single/married, renters/homeowners, middle class/working class.
- Urban market mix of single-family, town home, and multiunit dwellings.
- Majority of residents attended college or attained a college degree.
- Householders have traded their landlines for cell phones, which they use to listen to music, read the news, and get the latest sports updates on their favorite teams.
- Online all the time: use the internet for entertainment (downloading music, watching YouTube, finding dates), social media (Facebook, Twitter, LinkedIn), searching for employment.
- Leisure includes nightlife (clubbing, movies), going to the beach, some travel and hiking.



### COZY COUNTRY LIVING [LM6] | #1 in 10 and 20 Minutes

5 Minutes		10 Minutes		20 Minutes	
HHs	Percent	HHs	Percent	HHs	Percent
1,446	19.8%	5,671	35.5%	18,479	31.6%

- 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>

# RETAIL VIEW

| SOURCE: CLARITAS 2025

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)	\$161.0M	\$990.8M	\$4032.1M
- Potential Sales (Demand)	\$237.0M	\$747.0M	\$2986.5M
- Est. Surplus/(Leakage)	(\$75.9M)	\$243.8M	\$1045.6M
<hr/>			
Total Food and Drink (NAICS 722)	5 Minutes	10 Minutes	20 Minutes
- Est. Sales (Supply)	\$26.8M	\$87.0M	\$406.9M
- Potential Sales (Demand)	\$34.6M	\$109.3M	\$439.1M
- Est. Surplus/(Leakage)	(\$7.9M)	(\$22.3M)	(\$32.2M)
<hr/>			
Total Retail, Food and Drink (NAICS 44 – 45, 722)	5 Minutes	10 Minutes	20 Minutes
- Est. Sales (Supply)	\$187.8M	\$1077.8M	\$4439.0M
- Potential Sales (Demand)	\$271.6M	\$856.3M	\$3425.6M
- Est. Surplus/(Leakage)	(\$83.8M)	\$221.4M	\$1013.4M

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 HOWELL DRIVE TIME AREAS

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

**\$188**  
MILLION  
5 MINUTES

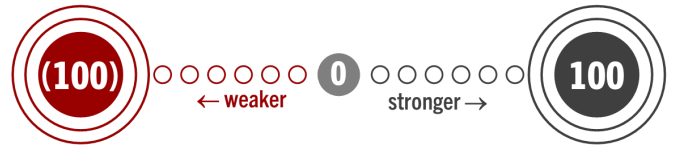
**\$1.1**  
BILLION  
10 MINUTES

**\$4.4**  
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 HOWELL DRIVE TIME AREAS

Category—Factor	5 Minutes	10 Minutes	20 Minutes
Motor Vehicle and Parts Dealers	(58.2)	33.5	20.9
Furniture / Home Furnishings Stores	28.1	(11.1)	(1.4)
Electronics and Appliance Stores	(26.7)	(59.4)	8.1
Building Materials, Garden & Supply	5.2	43.8	22.5
Food and Beverage Stores	(14.7)	9.9	3.7
Health and Personal Care Stores	(60.7)	(6.6)	(9.8)
Gasoline Stations	35.5	9.2	8.6
Clothing and Clothing Accessories	(9.0)	39.4	23.8
Sporting Goods, Hobby, Book, Music	24.1	9.6	14.7
General Merchandise Stores	(86.4)	(63.5)	44.7
Miscellaneous Store Retailers	30.0	29.8	13.0
Nonstore Retailers	(34.4)	1.2	(14.8)
Food Services and Drinking Places	(12.8)	(11.4)	(3.8)

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.

# 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 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

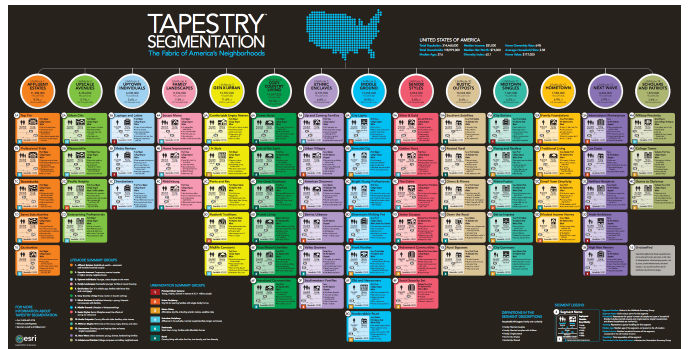
The Market Snapshot summarizes slices of more extensive data contained in source Esri and Claritas reports delivered with your snapshot. For example:

- 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](#).



# HOWELL, MICHIGAN



Population

**9,969**



Households

**4,544**



Median Household Income

**\$57,913**



Median Age

**38.9 years**



Housing Units

**4,813**



**94.4%** Housing Units Occupied

**54.6%** Owner-occupied

**39.8%** Renter-occupied

## POPULATION BY RACE/ETHNICITY | 2024

Total	9,969
- White Alone	88.8%
- Black Alone	1.4%
- American Indian Alone	0.4%
- Asian Alone	1.2%
- Pacific Islander Alone	0.5%
- Some Other Race Alone	1.6%
- Two or More Races	6.1%
Hispanic Origin	4.7%
Diversity Index	27.8

## KEY HOUSING INDICATORS | 2024

Median Home Value	\$256,250
Average Spent on Mortgage & Basics	\$9,187
Percentage of Income for Mortgage	27.7%
Housing Affordability Index	87

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
Howell	6.0%	19.3%	18.1%
Michigan	5.0%	21.3%	19.4%



	MILLENNIAL BORN 1981 TO 1998	GENERATION Z BORN 1999 TO 2016	ALPHA BORN 2017 TO PRESENT
Howell	28.7%	19.8%	8.2%
Michigan	23.0%	22.5%	8.8%

## AVERAGE SALES PER HOUSEHOLD [SOURCE: CLARITAS 2025]

### Furniture and Home Furnishings

Howell	\$1,590
Michigan	\$920

### Sporting Goods, Hobby, Book, Music

Howell	\$1,017
Michigan	\$778

### Food and Beverage Stores

Howell	\$1,946
Michigan	\$6,407

### General Merchandise Stores

Howell	\$427
Michigan	\$9,608

### Health and Personal Care Stores

Howell	\$1,128
Michigan	\$3,639

### Miscellaneous Store Retailers

Howell	\$2,475
Michigan	\$1,336

### Clothing and Clothing Accessories

Howell	\$1,744
Michigan	\$1,797

### Food Services and Drinking Places

Howell	\$5,767
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 Howell's city limits.

# SUPPLEMENT | SALES SURPLUS AND LEAKAGE CATEGORY ESTIMATES

| SOURCE: CLARITAS 2025

## DOWNTOWN HOWELL (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	(83,776,051)	(18.2)	221,429,371	11.4	1,013,363,168	12.9
44,45	- Total retail trade	(75,924,924)	(19.1)	243,768,114	14.0	1,045,565,891	14.9
NAICS	Motor Vehicle and Parts Dealers	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
441	Motor vehicle and parts dealers	(35,461,024)	(58.2)	159,127,601	33.5	341,505,873	20.9
4411	- Automobile dealers	(35,796,189)	(78.4)	119,733,196	30.9	292,158,488	21.0
44111	-- New car dealers	(36,609,598)	(100.0)	125,786,099	34.4	333,269,528	25.3
44112	-- Used car dealers	813,409	9.0	(6,052,904)	(28.8)	(41,111,040)	(58.5)
4412	- Other motor vehicle dealers	(2,683,822)	(98.8)	29,214,322	61.6	42,721,475	35.2
44121	-- Recreational vehicle dealers	(1,006,496)	(100.0)	(3,425,334)	(100.0)	(14,669,338)	(94.9)
44122	-- Motorcycle, boat, and other motor vehicle dealers	(1,677,325)	(98.2)	32,639,656	74.2	57,390,813	54.2
441222	--- Boat dealers	(601,390)	(100.0)	34,547,805	89.4	44,729,951	71.4
441228	--- Motorcycle, ATV, and all other motor vehicle dealers	(1,075,936)	(97.1)	(1,908,150)	(35.6)	12,660,862	29.3
4413	- Automotive parts, accessories, and tire stores	3,018,987	24.1	10,180,082	25.4	6,625,910	5.2
44131	-- Automotive parts and accessories stores	1,511,337	20.1	2,735,559	12.7	(7,886,813)	(11.7)
44132	-- Tire dealers	1,507,650	30.0	7,444,524	40.3	14,512,723	24.7
NAICS	Furniture and Home Furnishings Stores	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
442	Furniture and home furnishings stores	3,169,613	28.1	(2,536,060)	(11.1)	(1,411,047)	(1.4)
4421	- Furniture stores	(1,607,240)	(57.2)	(4,687,147)	(52.3)	(4,015,728)	(8.0)
4422	- Home furnishings stores	4,776,853	56.5	2,151,087	15.6	2,604,680	5.2
44221	-- Floor covering stores	(725,710)	(100.0)	(1,272,869)	(36.4)	(5,429,615)	(37.8)
44229	-- Other home furnishings stores	5,502,563	71.2	3,423,957	33.1	8,034,295	22.6
442291	--- Window treatment stores	(54,826)	(100.0)	(172,718)	(100.0)	(286,329)	(26.2)
442299	--- All other home furnishings stores	5,557,389	72.4	3,596,674	35.4	8,320,624	24.1
NAICS	Electronics and Appliance Stores	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
443	Electronics and appliance stores	(1,244,860)	(26.7)	(6,800,704)	(59.4)	6,405,856	8.1
443141	- Household appliance stores	812,811	36.8	(647,048)	(17.6)	3,044,410	15.1
443142	- Electronics stores	(2,057,671)	(83.6)	(6,153,657)	(79.2)	3,361,447	5.7
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	1,729,539	5.2	77,401,784	43.8	116,087,247	22.5
4441	- Building material and supplies dealers	3,751,563	12.1	78,036,806	47.6	99,883,935	22.4
44411	-- Home centers	(7,300,522)	(100.0)	71,364,171	60.8	89,013,962	32.5
44412	-- Paint and wallpaper stores	(565,909)	(100.0)	(1,802,551)	(99.4)	2,027,187	12.2
44413	-- Hardware stores	4,626,249	62.8	5,334,067	38.2	(401,812)	(1.2)
44419	-- Other building material dealers	6,991,745	44.3	3,141,119	10.2	9,244,597	7.6
4442	- Lawn and garden equipment and supplies stores	(2,022,024)	(91.5)	(635,023)	(5.1)	16,203,312	23.5
44421	-- Outdoor power equipment stores	(305,056)	(61.9)	(108,029)	(4.5)	1,158,877	10.3
44422	-- Nursery, garden center, and farm supply stores	(1,716,968)	(100.0)	(526,994)	(5.2)	15,044,435	26.1
NAICS	Food and Beverage Stores	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
445	Food and beverage stores	(8,073,414)	(14.7)	21,672,719	9.9	30,135,720	3.7
4451	- Grocery stores	(6,159,147)	(12.2)	23,697,123	11.8	33,009,617	4.5
44511	-- Supermarkets and other grocery (except convenience) stores	(10,142,872)	(23.1)	20,145,714	10.7	30,660,769	4.4
44512	-- Convenience stores	3,983,725	59.5	3,551,408	29.8	2,348,848	6.7
4452	- Specialty food stores	344,750	16.5	3,385,966	38.3	(639,510)	(3.1)
44521	-- Meat markets	(261,075)	(100.0)	1,267,014	43.6	868,766	11.9
44522	-- Fish and seafood markets	68,565	25.0	1,779,213	73.4	831,128	24.7
44523	-- Fruit and vegetable markets	(182,227)	(100.0)	(569,279)	(100.0)	(1,386,265)	(44.9)
44529	-- Other specialty food stores	719,487	52.6	909,019	31.0	(953,139)	(13.6)
445299	--- All other specialty food stores	625,391	67.5	1,182,616	55.6	102,946	2.7
4453	- Beer, wine, and liquor stores	(2,259,017)	(100.0)	(5,410,369)	(61.5)	(2,234,388)	(4.1)

**SUPPLEMENT | SALES SURPLUS AND LEAKAGE CATEGORY ESTIMATES | DOWNTOWN HOWELL (MI) DRIVE TIME AREAS**

		Estimated Sales Surplus/ (Leakage)					
NAICS		5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
<b>NAICS</b>	<b>Health and Personal Care Stores</b>						
446	Health and personal care stores	(11,831,691)	(60.7)	(6,045,397)	(6.6)	(34,842,167)	(9.8)
44611	- Pharmacies and drug stores	(10,194,298)	(63.2)	(3,049,898)	(3.9)	(40,292,949)	(14.0)
44612	- Cosmetics, beauty supplies, and perfume stores	(977,223)	(80.5)	(1,099,583)	(19.1)	4,964,831	15.3
44613	- Optical goods stores	(527,969)	(100.0)	(854,054)	(35.8)	(1,541,221)	(13.4)
44619	- Other health and personal care stores	(132,201)	(8.2)	(1,041,863)	(23.4)	2,027,171	8.4
446191	-- Food (health) supplement stores	(212,934)	(52.8)	(752,864)	(63.9)	(2,147,372)	(38.5)
446199	-- All other health and personal care stores	80,733	6.6	(288,999)	(8.8)	4,174,543	22.7
<b>NAICS</b>	<b>Gasoline Stations</b>						
447	Gasoline Stations	23,368,992	35.5	13,287,773	9.2	48,511,784	8.6
<b>NAICS</b>	<b>Clothing and Clothing Accessories Stores</b>						
448	Clothing and clothing accessories stores	(1,567,335)	(9.0)	38,737,188	39.4	73,651,902	23.8
4481	- Clothing stores	(1,366,354)	(11.4)	35,277,165	45.5	55,150,948	24.8
44811	-- Men's clothing stores	(293,199)	(100.0)	878,214	32.7	4,133,384	36.5
44812	-- Women's clothing stores	(1,047,076)	(100.0)	2,853,008	30.5	7,125,537	21.6
44813	-- Children's and infants' clothing stores	(230,432)	(100.0)	8,795,135	83.4	6,314,633	48.5
44814	-- Family clothing stores	(3,828,700)	(85.8)	10,077,239	27.8	16,502,546	13.7
44815	-- Clothing accessories stores	180,467	18.5	4,356,283	63.9	2,329,020	19.2
44819	-- Other clothing stores	3,852,586	77.0	8,317,285	69.9	18,745,826	56.7
4482	- Shoe stores	(1,145,240)	(100.0)	5,305,814	42.7	23,491,569	45.8
4483	- Jewelry, luggage, and leather goods stores	944,259	22.2	(1,845,792)	(22.1)	(4,990,615)	(14.1)
44831	-- Jewelry stores	1,663,239	47.1	381,057	6.2	3,825,157	14.3
44832	-- Luggage and leather goods stores	(718,980)	(100.0)	(2,226,848)	(100.0)	(8,815,772)	(100.0)
<b>NAICS</b>	<b>Sporting Goods, Hobby, Musical Instrument, and Book Stores</b>						
451	Sporting goods, hobby, musical instrument, and book stores	1,980,198	24.1	2,085,301	9.6	13,368,881	14.7
4511	- Sporting goods, hobby, and musical instrument stores	2,120,060	28.1	2,454,481	12.6	12,526,754	15.6
45111	-- Sporting goods stores	1,923,112	34.0	2,591,154	18.1	6,244,155	11.8
45112	-- Hobby, toy, and game stores	(351,185)	(36.8)	(274,846)	(7.2)	4,541,504	22.0
45113	-- Sewing, needlework, and piece goods stores	70,163	30.0	(99,337)	(23.8)	1,168,310	36.1
45114	-- Musical instrument and supplies stores	477,971	67.2	237,512	25.0	572,785	16.9
4512	- Book stores and news dealers	(139,862)	(21.3)	(369,182)	(17.4)	842,127	7.8
451211	-- Book stores	(132,042)	(21.1)	(348,313)	(17.2)	813,537	8.0
451212	-- News dealers and newsstands	(7,820)	(24.2)	(20,869)	(20.1)	28,590	5.5
<b>NAICS</b>	<b>General Merchandise Stores</b>						
452	General merchandise stores	(27,430,254)	(86.4)	(71,810,684)	(63.5)	590,834,228	44.7
4522	- Department stores	(1,744,146)	(100.0)	5,121,703	31.8	20,266,976	31.7
4523	- Other general merchandise stores	(25,686,107)	(85.6)	(76,932,387)	(79.4)	570,567,250	45.3
452311	-- Warehouse clubs and supercenters	(25,553,958)	(100.0)	(79,764,156)	(100.0)	577,863,767	47.8
452319	-- All other general merchandise stores	(132,149)	(3.0)	2,831,769	16.5	(7,296,516)	(14.7)
<b>NAICS</b>	<b>Miscellaneous Store Retailers</b>						
453	Miscellaneous store retailers	4,902,524	30.0	14,847,067	29.8	20,874,454	13.0
4531	- Florists	880,987	62.9	539,536	24.8	(245,866)	(3.9)
4532	- Office supplies, stationery, and gift stores	(307,034)	(22.1)	(1,890,261)	(56.2)	(726,156)	(3.6)
45321	-- Office supplies and stationery stores	(235,458)	(100.0)	(731,081)	(100.0)	1,238,604	17.6
45322	-- Gift, novelty, and souvenir stores	(71,576)	(6.2)	(1,159,179)	(44.0)	(1,964,760)	(14.9)
4533	- Used merchandise stores	119,383	7.1	(430,012)	(9.9)	(2,375,148)	(14.3)
4539	- Other miscellaneous store retailers	4,209,190	35.4	16,627,804	41.6	24,221,624	20.7
45391	-- Pet and pet supplies stores	(653,231)	(34.3)	5,025,367	39.9	11,342,032	27.6
45392	-- Art dealers	5,072,874	83.2	4,024,845	56.4	8,517,159	40.7
45393	-- Manufactured (mobile) home dealers	(163,429)	(39.5)	(576,659)	(41.6)	(3,894,732)	(82.0)
45399	-- All other miscellaneous store retailers	(47,025)	(1.4)	8,154,249	43.2	8,257,165	16.4
453991	--- Tobacco stores	989,479	42.3	1,067,532	21.2	3,360,442	18.2
453998	--- All other miscellaneous store retailers (except tobacco stores)	(1,036,503)	(91.1)	7,086,718	51.3	4,896,724	15.4

		Estimated Sales Surplus/ (Leakage)					
NAICS	Non-store Retailers	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
454	Non-store retailers	(25,467,214)	(34.4)	3,801,527	1.2	(159,556,839)	(14.8)
4541	- Electronic shopping and mail-order houses	(25,388,170)	(37.3)	(7,495,204)	(2.6)	(157,084,015)	(15.6)
4542	- Vending machine operators	(282,667)	(100.0)	(883,605)	(100.0)	(3,472,294)	(100.0)
4543	- Direct selling establishments	203,623	3.6	12,180,335	41.6	999,470	1.5
45431	- - Fuel dealers	(575,728)	(18.4)	3,198,639	21.6	(7,813,690)	(20.5)
45439	- - Other direct selling establishments	779,350	30.8	8,981,696	62.1	8,813,161	28.7
NAICS	Food Services and Drinking Places	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
722	Food services and drinking places	(7,851,128)	(12.8)	(22,338,743)	(11.4)	(32,202,723)	(3.8)
7223	- Special food services	(2,242,355)	(89.2)	(5,026,652)	(50.7)	(24,399,070)	(68.4)
72231	- - Food service contractors	(1,887,024)	(100.0)	(5,921,501)	(100.0)	(21,384,658)	(81.5)
72232	- - Caterers	(312,412)	(54.3)	957,271	25.5	(2,667,912)	(31.1)
72233	- - Mobile food services	(42,920)	(81.3)	(62,422)	(26.0)	(346,499)	(40.0)
7224	- Drinking places (alcoholic beverages)	1,162,294	33.0	(1,306,459)	(21.3)	(8,755,041)	(41.0)
7225	- Restaurants and other eating places	(6,771,066)	(12.2)	(16,005,632)	(8.9)	951,388	0.1
722511	- - Full-service restaurants	4,513,948	12.6	9,259,597	8.6	34,033,669	7.9
722513	- - Limited-service restaurants	(12,380,309)	(89.4)	(23,534,718)	(39.7)	(20,798,638)	(6.7)
722514	- - Cafeterias, grill buffets, and buffets	(334,096)	(100.0)	(1,055,183)	(100.0)	(4,230,606)	(99.9)
722515	- - Snack and non-alcoholic beverage bars	1,429,392	26.2	(675,328)	(5.6)	(8,053,037)	(18.8)

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.

