

THE HISTORIC NORTH END

DETROIT, MICHIGAN



MARKET SNAPSHOT

Vanguard Community Development and community partners are taking a pro-active approach to planning for the future prosperity of Detroit's Historic North End business district. Ongoing efforts are serving to heighten the district's appeal 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 The Historic North End 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 for assessing district enhancement strategies; and for tracking changes in the market and possible implications for Detroit's Historic North End.



(313) 462-4300 | vanguarddetroit.org



The Historic North End is a Michigan Main Street district.

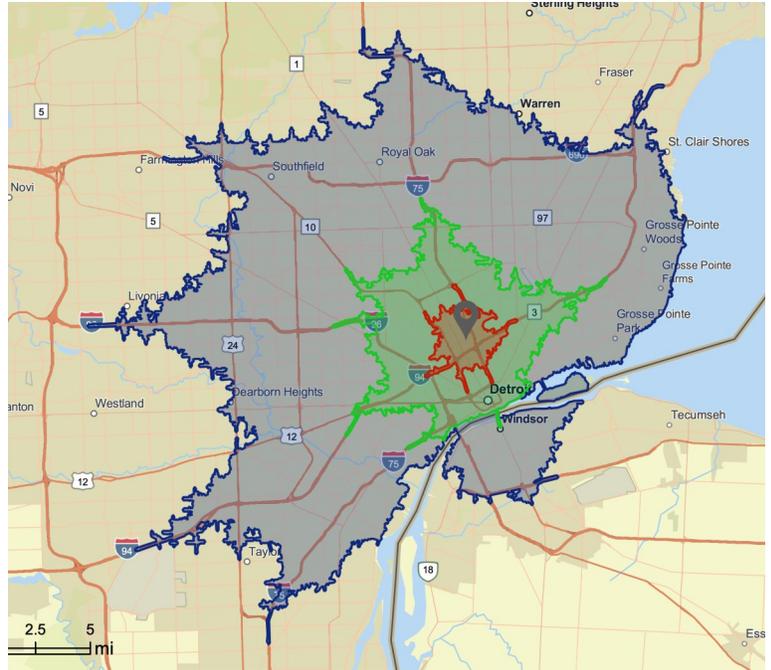
Michigan Main Street assists communities revitalizing and preserving their traditional commercial districts.

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.

THE HISTORIC NORTH END DRIVE TIME MARKET

DEMOGRAPHIC FAST FACTS

SOURCE: ESRI 2025



POPULATION	5 Minutes	10 Minutes	20 Minutes
2010 Total	27,333	260,991	1,509,632
2020 Total	27,900	232,284	1,463,315
2025 Estimate	28,329	230,779	1,435,431
2030 Projection	29,007	229,579	1,420,182
Growth (2025-30)	2.4%	-0.5%	-1.1%
Projected State Population Growth (2025-30)			-0.2%



2025 DAYTIME POP	5 Minutes	10 Minutes	20 Minutes
Total Daytime Population	62,214	344,171	1,543,752
Workers	44,174	192,483	707,340
Residents	18,040	151,688	836,412
Daytime Change	119.6%	49.1%	7.5%



HOUSEHOLDS	5 Minutes	10 Minutes	20 Minutes
2010 Total	11,844	102,404	589,336
2020 Total	12,668	95,346	586,910
2025 Estimate	13,316	97,502	591,923
2030 Projection	13,844	98,620	595,782
Growth (2025-30)	4.0%	1.1%	0.7%
Projected State Households Growth (2025-30)			1.3%



MEDIAN HH INCOME	5 Minutes	10 Minutes	20 Minutes
2025 Estimate	\$34,176	\$37,137	\$56,159
2030 Projection	\$39,226	\$41,767	\$63,151
Growth (2025-30)	14.8%	12.5%	12.5%
2025 State Median HH: \$72,645		2025-30 State Growth: 11.2%	

MARKET TRAITS

| SOURCE: ESRI 2025



PER CAPITA INCOME

2025 ESTIMATE

5 Minutes	\$27,705
10 Minutes	\$24,307
20 Minutes	\$32,318
State	\$41,134



MEDIAN AGE

2025 ESTIMATE

5 Minutes	33.6
10 Minutes	34.8
20 Minutes	37.6
State	40.8



2025 EMPLOYED

CIVILIAN POPULATION 16+

5 Minutes	89.5%
10 Minutes	88.0%
20 Minutes	91.5%
State	94.4%



POPULATION BY RACE/ETHNICITY—DIVERSITY

Diversity Index	5 Minutes	10 Minutes	20 Minutes
2010	40.9	50.9	60.7
2020	56.8	64.5	65.8
2025	57.6	65.2	66.7
2030	57.1	65.3	67.3

i State Diversity Index 2025: 50.6 2030: 52.5

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).



HOUSING UNITS	5 Minutes	10 Minutes	20 Minutes
2025 Estimate	16,546	124,468	664,082
- Owner Occupied	19.7%	31.1%	54.0%
- Renter Occupied	60.8%	47.2%	35.2%
- Vacant	19.5%	21.7%	10.9%

i State Estimated Percent Vacant (2025) 11.0%



2025 POPULATION 25+ BY EDUCATIONAL ATTAINMENT

Education	5 Minutes	10 Minutes	20 Minutes
No High School Diploma	11.6%	17.4%	12.2%
High School Grad/GED	23.5%	30.1%	29.7%
Some College/Associate	27.5%	27.9%	30.6%
Bachelor/Grad/Prof	37.5%	24.6%	27.6%



2025 EMPLOYMENT BY OCCUPATION

2025 Employed 16+	5 Minutes	10 Minutes	20 Minutes
Total Estimate	10,487	79,758	609,884
- White Collar	62.0%	51.4%	56.2%
- Services	22.1%	23.1%	19.0%
- Blue Collar	15.9%	25.5%	24.8%

Source: Esri Market Profile | 07.25

LIFESTYLE PROFILE

| SOURCE: ESRI 2025

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.

TOP DRIVE TIME AREA TAPESTRY SEGMENTS

5 Minutes—Households	10 Minutes—Households	20 Minutes—Households
Emerging Hub (D1) 25%	Modest Income Home (E1) 29%	Modest Income Home (E1) 23%
Social Security Set (A3) 19%	Independt Cityscapes (A1) 11%	Middle Ground (K2) 10%
Independt Cityscapes (A1) 17%	Metro Renters (D4) 10%	Family Foundations (C4) 9%



DOMINANT TAPESTRY SEGMENTS

EMERGING HUB (D1)

LIFEMODE GROUP D: [TECH TRAILBLAZERS](#)

This segment is characterized by young, high-earning, mobile urban professionals.

Households—5 Minutes	Households—10 Minutes	Households—20 Minutes
3,266 24.5%	6,290 6.5%	22,554 3.8%

Key Statistics	
Median Age	36.0
Median HH Income	\$70,356
Median Net Worth	\$58,291
Bachelor's Degree +	51.6%
Median Home Value	\$369,687
Homeownership Rate	32.7%
Pct. In Labor Force	74.0%
Unemployment Rate	3.6%

Lifestyle Patterns	
<ul style="list-style-type: none"> Residents tend to shop online for groceries, clothing, household essentials, and electronics. They often plan domestic trips and spend money on workout wear, team sports apparel, and educational books. These residents use the internet to conduct meetings, complete assignments, and search for employment and housing. Social media use is common. Playing video games and watching TV are common sources of entertainment. 	

MODEST INCOME HOMES (E1)

LIFEMODE GROUP E: [COMMUNITY CONNECTIONS](#)

This segment is characterized by Midwest and Southern urban and suburban neighborhoods.

Households—5 Minutes	Households—10 Minutes	Households—20 Minutes
649 4.9%	28,524 29.3%	133,634 22.6%

Key Statistics	
Median Age	37.1
Median HH Income	\$35,121
Median Net Worth	\$18,675
Bachelor's Degree +	12.4%
Median Home Value	\$80,736
Homeownership Rate	46.9%
Pct. In Labor Force	50.6%
Unemployment Rate	10.5%

Lifestyle Patterns	
<ul style="list-style-type: none"> Residents tend to shop at discount supermarkets and stores. Dining out is often at fast food restaurants, and convenience stores are popular for quick purchases. They watch TV using cable or streaming services, follow professional basketball games, and read magazines for news and entertainment. Residents use their cell phones for accessing news and entertainment as well as connecting with family and friends and using digital payment services. 	

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

Source: Esri Community Tapestry Segmentation | 07.25

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)	\$298.2M	\$2762.6M	\$21954.9M
- Potential Sales (Demand)	\$290.5M	\$2681.3M	\$23311.9M
- Est. Surplus/(Leakage)	\$7.7M	\$81.4M	(\$1357.0M)

Total Food and Drink (NAICS 722)	5 Minutes	10 Minutes	20 Minutes
- Est. Sales (Supply)	\$67.2M	\$838.9M	\$3904.7M
- Potential Sales (Demand)	\$42.3M	\$387.6M	\$3421.4M
- Est. Surplus/(Leakage)	\$24.9M	\$451.3M	\$483.3M

Total Retail, Food and Drink (NAICS 44 – 45, 722)	5 Minutes	10 Minutes	20 Minutes
- Est. Sales (Supply)	\$365.4M	\$3601.6M	\$25859.5M
- Potential Sales (Demand)	\$332.8M	\$3068.9M	\$26733.3M
- Est. Surplus/(Leakage)	\$32.6M	\$532.7M	(\$873.7M)

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

THE HISTORIC NORTH END DRIVE TIME AREAS

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

\$365
MILLION
5 MINUTES

\$3.6
BILLION
10 MINUTES

\$25.9
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 | THE HISTORIC NORTH END DRIVE TIME AREAS

Category—Factor	5 Minutes	10 Minutes	20 Minutes
Motor Vehicle and Parts Dealers	22.5	(12.4)	1.2
Furniture / Home Furnishings Stores	(76.3)	(11.2)	5.9
Electronics and Appliance Stores	(69.0)	(38.5)	4.9
Building Materials, Garden & Supply	(99.3)	(65.6)	(8.9)
Food and Beverage Stores	(25.3)	10.6	1.0
Health and Personal Care Stores	50.3	8.5	16.3
Gasoline Stations	22.2	31.5	10.0
Clothing and Clothing Accessories	47.9	24.0	9.2
Sporting Goods, Hobby, Book, Music	9.4	(33.7)	(12.9)
General Merchandise Stores	(90.0)	19.1	(4.4)
Miscellaneous Store Retailers	0.4	25.1	10.0
Nonstore Retailers	(28.2)	(26.3)	(33.3)
Food Services and Drinking Places	22.7	36.8	6.6

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 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

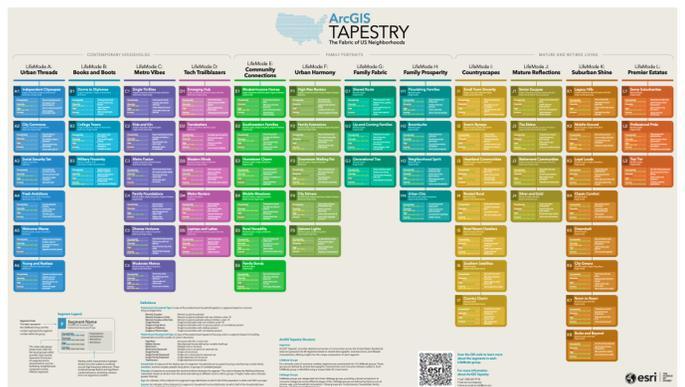
The Market Snapshot summarizes slices of more extensive data contained in source Esri and Claritas reports delivered with your snapshot. For example:

- 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	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](#).



NORTH END NEIGHBORHOOD

U.S. CENSUS TRACTS 261635112, 261635114, 261635119



Population
4,736



Households
2,258



Median Household Income
\$31,241



Median Age
39.4 years



Housing Units
3,262



69.2% Housing Units Occupied
25.3% Owner-occupied
43.9% Renter-occupied

POPULATION BY RACE/ETHNICITY | 2025

Total	4,736
- White Alone	15.0%
- Black Alone	77.4%
- American Indian Alone	0.3%
- Asian Alone	1.2%
- Pacific Islander Alone	0.0%
- Some Other Race Alone	1.2%
- Two or More Races	4.9%
Hispanic Origin	3.0%
Diversity Index	41.2

KEY HOUSING INDICATORS | 2025

Median Home Value	\$170,127
Average Spent on Mortgage & Basics	\$4,492
Percentage of Income for Mortgage	34.1%
Housing Affordability Index	59

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 | 07.25

POPULATION BY GENERATION [SOURCE: ESRI 2025]



	GREATEST GEN BORN 1945 & EARLIER	BABY BOOMER BORN 1946 TO 1964	GENERATION X BORN 1965 TO 1980
Neighborhood	3.3%	19.7%	20.3%
Michigan	4.6%	21.0%	19.3%



	MILLENNIAL BORN 1981 TO 1998	GENERATION Z BORN 1999 TO 2016	ALPHA BORN 2017 TO PRESENT
Neighborhood	27.2%	20.9%	8.6%
Michigan	23.1%	22.2%	9.8%

AVERAGE SALES PER HOUSEHOLD [SOURCE: CLARITAS 2025]

Furniture and Home Furnishings

	Neighborhood	\$294
	Michigan	\$920

Sporting Goods, Hobby, Book, Music

	Neighborhood	\$188
	Michigan	\$778

Food and Beverage Stores

	Neighborhood	\$3,543
	Michigan	\$6,407

General Merchandise Stores

	Neighborhood	\$692
	Michigan	\$9,608

Health and Personal Care Stores

	Neighborhood	\$575
	Michigan	\$3,639

Miscellaneous Store Retailers

	Neighborhood	\$1,467
	Michigan	\$1,336

Clothing and Clothing Accessories

	Neighborhood	\$1,100
	Michigan	\$1,797

Food Services and Drinking Places

	Neighborhood	\$4,974
	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 the North End Neighborhood's geography.

SUPPLEMENT | SALES SURPLUS AND LEAKAGE CATEGORY ESTIMATES

| SOURCE: CLARITAS 2025

THE HISTORIC NORTH END (DETROIT, 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	32,598,124	4.7	532,696,329	8.0	(873,736,951)	(1.7)
44,45	- Total retail trade	7,742,955	1.3	81,375,082	1.5	(1,357,033,539)	(3.0)
NAICS	Motor Vehicle and Parts Dealers	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
441	Motor vehicle and parts dealers	33,703,065	22.5	(120,712,058)	(12.4)	113,688,250	1.2
4411	- Automobile dealers	42,013,874	29.9	(80,076,686)	(9.4)	343,908,684	4.0
44111	-- New car dealers	46,977,612	34.7	(62,370,106)	(8.1)	154,230,321	2.0
44112	-- Used car dealers	(4,963,739)	(100.0)	(17,706,580)	(23.3)	189,678,363	18.6
4412	- Other motor vehicle dealers	(2,571,557)	(71.1)	(26,280,336)	(77.9)	(211,697,923)	(61.3)
44121	-- Recreational vehicle dealers	(1,129,862)	(100.0)	(11,090,176)	(100.0)	(85,123,149)	(68.4)
44122	-- Motorcycle, boat, and other motor vehicle dealers	(1,441,694)	(57.9)	(15,190,160)	(67.0)	(126,574,775)	(57.3)
441222	--- Boat dealers	(675,682)	(100.0)	(5,310,698)	(66.9)	(50,385,208)	(67.5)
441228	--- Motorcycle, ATV, and all other motor vehicle dealers	(766,012)	(42.3)	(9,879,461)	(67.1)	(76,189,567)	(52.1)
4413	- Automotive parts, accessories, and tire stores	(5,739,252)	(100.0)	(14,355,036)	(15.4)	(18,522,511)	(2.0)
44131	-- Automotive parts and accessories stores	(3,617,800)	(100.0)	(2,826,299)	(4.3)	13,223,527	2.2
44132	-- Tire dealers	(2,121,452)	(100.0)	(11,528,736)	(40.8)	(31,746,038)	(10.0)
NAICS	Furniture and Home Furnishings Stores	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
442	Furniture and home furnishings stores	(4,165,043)	(76.3)	(8,932,804)	(11.2)	49,675,712	5.9
4421	- Furniture stores	(2,635,211)	(99.8)	1,887,996	3.8	68,323,773	13.8
4422	- Home furnishings stores	(1,529,831)	(54.3)	(10,820,801)	(36.6)	(18,648,062)	(5.4)
44221	-- Floor covering stores	(839,706)	(100.0)	(4,180,541)	(35.5)	(18,065,006)	(14.2)
44229	-- Other home furnishings stores	(690,125)	(34.9)	(6,640,260)	(37.3)	(583,056)	(0.3)
442291	--- Window treatment stores	(66,674)	(100.0)	(609,352)	(97.1)	9,149,698	45.9
442299	--- All other home furnishings stores	(623,451)	(32.7)	(6,030,908)	(35.1)	(9,732,753)	(5.0)
NAICS	Electronics and Appliance Stores	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
443	Electronics and appliance stores	(2,963,635)	(69.0)	(18,407,497)	(38.5)	29,386,509	4.9
443141	- Household appliance stores	(841,884)	(100.0)	(7,043,195)	(83.9)	(2,079,170)	(1.6)
443142	- Electronics stores	(2,121,750)	(61.4)	(11,364,302)	(28.9)	31,465,679	6.7
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	(18,014,367)	(99.3)	(134,268,721)	(65.6)	(246,687,323)	(8.9)
4441	- Building material and supplies dealers	(15,540,519)	(99.2)	(113,016,156)	(62.8)	(101,950,772)	(4.0)
44411	-- Home centers	(8,408,749)	(100.0)	(78,740,408)	(100.0)	(36,028,923)	(2.6)
44412	-- Paint and wallpaper stores	(596,058)	(100.0)	282,484	2.4	21,244,823	16.5
44413	-- Hardware stores	(1,506,263)	(92.0)	(2,771,822)	(10.4)	14,611,840	5.3
44419	-- Other building material dealers	(5,029,449)	(100.0)	(31,786,410)	(50.8)	(101,778,512)	(13.7)
4442	- Lawn and garden equipment and supplies stores	(2,473,848)	(100.0)	(21,252,565)	(86.2)	(144,736,550)	(54.9)
44421	-- Outdoor power equipment stores	(460,114)	(100.0)	(3,952,858)	(85.4)	(5,939,917)	(8.3)
44422	-- Nursery, garden center, and farm supply stores	(2,013,735)	(100.0)	(17,299,708)	(86.3)	(138,796,635)	(72.2)
NAICS	Food and Beverage Stores	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
445	Food and beverage stores	(16,076,581)	(25.3)	86,481,373	10.6	63,162,708	1.0
4451	- Grocery stores	(24,103,790)	(50.5)	(84,254,545)	(14.8)	(536,733,358)	(10.7)
44511	-- Supermarkets and other grocery (except convenience) stores	(25,000,790)	(57.7)	(86,212,594)	(16.1)	(557,734,375)	(11.7)
44512	-- Convenience stores	896,999	20.4	1,958,050	5.8	21,001,019	7.3
4452	- Specialty food stores	2,998,744	57.6	62,182,417	75.6	133,778,388	43.9
44521	-- Meat markets	1,053,133	61.5	32,029,277	84.2	58,347,428	53.1
44522	-- Fish and seafood markets	507,597	66.1	12,427,244	84.0	21,512,050	51.5
44523	-- Fruit and vegetable markets	1,347,474	74.4	8,463,684	66.7	24,151,518	40.3
44529	-- Other specialty food stores	90,539	9.9	9,262,211	55.2	29,767,392	31.8
445299	--- All other specialty food stores	299,340	44.0	3,530,721	50.4	13,503,345	31.3
4453	- Beer, wine, and liquor stores	5,028,466	47.4	108,553,502	68.0	466,117,678	51.2

SUPPLEMENT | SALES SURPLUS AND LEAKAGE CATEGORY ESTIMATES | THE HISTORIC NORTH END (DETROIT, MI) DRIVE TIME AREAS

		Estimated Sales Surplus/ (Leakage)					
NAICS		5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
NAICS	Health and Personal Care Stores						
446	Health and personal care stores	38,776,871	50.3	32,739,813	8.5	600,563,958	16.3
44611	- Pharmacies and drug stores	41,820,262	56.4	43,864,410	12.8	547,452,764	17.5
44612	- Cosmetics, beauty supplies, and perfume stores	(1,335,105)	(99.8)	(2,208,927)	(9.8)	3,675,402	1.7
44613	- Optical goods stores	(638,278)	(99.9)	(818,420)	(7.3)	18,491,205	15.0
44619	- Other health and personal care stores	(1,070,008)	(99.7)	(8,097,250)	(69.2)	30,944,587	15.2
446191	-- Food (health) supplement stores	(377,203)	(99.9)	(3,366,245)	(93.4)	(5,578,616)	(10.1)
446199	-- All other health and personal care stores	(692,805)	(99.5)	(4,731,005)	(58.4)	36,523,203	24.6
NAICS	Gasoline Stations						
447	Gasoline Stations	15,148,172	22.2	223,994,621	31.5	460,698,267	10.0
NAICS	Clothing and Clothing Accessories Stores						
448	Clothing and clothing accessories stores	21,989,080	47.9	68,506,435	24.0	190,593,709	9.2
4481	- Clothing stores	7,365,412	30.4	48,130,398	23.9	74,578,254	5.3
44811	-- Men's clothing stores	2,320,323	75.2	10,094,500	59.9	15,774,849	21.5
44812	-- Women's clothing stores	455,095	14.4	1,684,310	6.5	17,300,033	7.7
44813	-- Children's and infants' clothing stores	(215,695)	(100.0)	4,363,212	46.2	8,860,215	15.7
44814	-- Family clothing stores	801,438	7.1	13,712,876	12.6	5,208,288	0.6
44815	-- Clothing accessories stores	2,492,247	70.6	4,985,616	35.2	3,310,291	4.1
44819	-- Other clothing stores	1,512,005	50.4	13,289,887	50.0	24,124,578	17.5
4482	- Shoe stores	(1,193,434)	(69.2)	9,909	0.0	15,624,948	6.5
4483	- Jewelry, luggage, and leather goods stores	15,817,103	79.0	20,366,129	35.0	100,390,507	23.6
44831	-- Jewelry stores	(700,589)	(42.8)	10,987,129	34.2	116,888,108	39.0
44832	-- Luggage and leather goods stores	16,517,692	89.9	9,378,999	36.1	(16,497,601)	(13.2)
NAICS	Sporting Goods, Hobby, Musical Instrument, and Book Stores						
451	Sporting goods, hobby, musical instrument, and book stores	766,896	9.4	(17,291,595)	(33.7)	(68,916,855)	(12.9)
4511	- Sporting goods, hobby, and musical instrument stores	(2,943,805)	(84.9)	(21,852,415)	(57.6)	(76,081,620)	(16.9)
45111	-- Sporting goods stores	(2,199,963)	(100.0)	(14,734,597)	(56.2)	(61,286,167)	(20.4)
45112	-- Hobby, toy, and game stores	(505,659)	(49.2)	(5,273,912)	(57.8)	(16,105,453)	(14.6)
45113	-- Sewing, needlework, and piece goods stores	(94,994)	(100.0)	(806,764)	(81.1)	1,264,171	7.3
45114	-- Musical instrument and supplies stores	(143,188)	(100.0)	(1,037,141)	(65.7)	45,828	0.2
4512	- Book stores and news dealers	3,710,700	79.6	4,560,821	34.1	7,164,763	8.5
451211	-- Book stores	3,677,842	80.3	4,193,419	33.4	7,416,428	9.2
451212	-- News dealers and newsstands	32,858	40.1	367,402	44.8	(251,665)	(6.9)
NAICS	General Merchandise Stores						
452	General merchandise stores	(34,739,600)	(90.0)	158,616,648	19.1	(246,092,484)	(4.4)
4522	- Department stores	(2,188,027)	(100.0)	(8,699,734)	(27.9)	(41,475,077)	(13.7)
4523	- Other general merchandise stores	(32,551,573)	(89.4)	167,316,382	20.9	(204,617,407)	(3.9)
452311	-- Warehouse clubs and supercenters	(31,641,665)	(100.0)	147,446,304	20.2	(250,215,885)	(5.3)
452319	-- All other general merchandise stores	(909,908)	(19.0)	19,870,079	27.6	45,598,478	9.2
NAICS	Miscellaneous Store Retailers						
453	Miscellaneous store retailers	51,096	0.4	43,600,948	25.1	123,909,917	10.0
4531	- Florists	391,467	39.5	463,175	7.6	(6,835,879)	(15.7)
4532	- Office supplies, stationery, and gift stores	409,169	16.5	596,044	3.0	(9,862,058)	(6.3)
45321	-- Office supplies and stationery stores	(282,360)	(99.7)	(1,585,776)	(43.9)	(2,704,119)	(6.3)
45322	-- Gift, novelty, and souvenir stores	691,529	31.4	2,181,819	13.6	(7,157,939)	(6.3)
4533	- Used merchandise stores	(449,213)	(29.9)	12,777,959	41.9	(1,791,011)	(1.2)
4539	- Other miscellaneous store retailers	(300,327)	(3.2)	29,763,770	25.3	142,398,865	16.0
45391	-- Pet and pet supplies stores	(1,606,129)	(100.0)	(12,912,911)	(80.2)	(28,620,072)	(13.2)
45392	-- Art dealers	3,527,700	73.4	44,940,008	79.5	127,582,912	56.1
45393	-- Manufactured (mobile) home dealers	(323,439)	(100.0)	(3,176,434)	(100.0)	17,091,307	22.1
45399	-- All other miscellaneous store retailers	(1,898,458)	(71.6)	913,107	2.2	26,344,718	7.1
453991	--- Tobacco stores	(924,553)	(94.6)	233,193	1.4	32,366,756	19.8
453998	--- All other miscellaneous store retailers (except tobacco stores)	(973,905)	(58.2)	679,915	2.7	(6,022,038)	(2.9)

		Estimated Sales Surplus/ (Leakage)					
NAICS	Non-store Retailers	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
454	Non-store retailers	(26,733,000)	(28.2)	(232,952,082)	(26.3)	(2,427,015,908)	(33.3)
4541	- Electronic shopping and mail-order houses	(23,894,617)	(26.4)	(204,018,765)	(24.1)	(2,247,445,592)	(32.6)
4542	- Vending machine operators	310,979	30.1	(742,067)	(12.8)	(11,964,428)	(27.4)
4543	- Direct selling establishments	(3,149,361)	(94.5)	(28,191,249)	(88.0)	(167,605,887)	(46.6)
45431	-- Fuel dealers	(2,085,618)	(91.9)	(18,387,032)	(82.7)	(141,077,344)	(65.6)
45439	-- Other direct selling establishments	(1,063,742)	(100.0)	(9,804,217)	(100.0)	(26,528,542)	(18.3)
NAICS	Food Services and Drinking Places	5 Minutes	Factor	10 Minutes	Factor	20 Minutes	Factor
722	Food services and drinking places	24,855,168	22.7	451,321,248	36.8	483,296,588	6.6
7223	- Special food services	9,724,278	62.7	213,838,752	80.1	295,109,374	38.6
72231	-- Food service contractors	9,686,493	67.9	210,772,601	83.4	258,421,866	41.0
72232	-- Caterers	96,635	8.1	3,500,960	26.0	37,189,167	29.7
72233	-- Mobile food services	(58,849)	(100.0)	(434,809)	(67.6)	(501,659)	(5.6)
7224	- Drinking places (alcoholic beverages)	907,239	24.7	41,065,061	61.8	90,107,145	28.2
7225	- Restaurants and other eating places	14,223,651	15.8	196,417,433	22.0	98,080,070	1.6
722511	-- Full-service restaurants	14,548,297	27.7	158,536,798	31.3	188,041,867	5.7
722513	-- Limited-service restaurants	(996,608)	(3.2)	35,535,467	10.7	(77,982,124)	(3.1)
722514	-- Cafeterias, grill buffets, and buffets	154,916	15.9	1,709,463	18.5	(9,160,520)	(16.1)
722515	-- Snack and non-alcoholic beverage bars	517,045	9.4	635,706	1.4	(2,819,154)	(0.7)

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.

