PUBLIC SECTOR CONSULTANTS

Michigan Retailers Association

Economic Impact of Buying Nearby

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Introduction

Retail businesses play an essential role in Michigan's economy. They connect producers to consumers and employ 11 percent of Michigan's workforce, almost 450,000 workers (BLS 2025). Retailers pay these workers $18.9 billion in wages each year.[1] [2] Further, these businesses support growth and activity in other sectors—for every $1 spent at a local retailer in Michigan, an additional $0.78 in output was generated in the economy (IMPLAN analysis).

For the past 86 years, the Michigan Retailers Association (MRA) has been the voice of Michigan's retail industry. MRA currently represents more than 15,000 brick-and-mortar and online stores among its 5,000 business members. According to the most current data from the U.S. Bureau of Labor Statistics (BLS) and the U.S. Census Bureau, Michigan is home to 91,388 retail establishments, comprising 8 percent of all Michigan private business establishments (U.S. Census Bureau 2025, BLS 2025).[3]

In 2025, these local hardware and auto parts stores, grocers and jewelers, clothing shops and home goods stores, specialty retailers, and other retailers contributed to Michigan's economy with effects stemming from an estimated $203.3 billion in total retail sales (U.S. Census Bureau 2024, U.S. Census Bureau June 2026). An estimated $33.4 billion of those sales (16 percent) came from Michigan's remote sales such as e-commerce, mail-order catalog, and home-shopping television sales (U.S. Census Bureau May 2026).[4] Many of these remote sales promote out-of-state businesses.

If a portion of those out-of-state remote sales were shifted to Michigan's brick-and-mortar businesses, the impact of local retail stores on Michigan's economy would be greater as more dollars remain in the state. MRA has partnered with Public Sector Consultants (PSC) for the past several years to measure the effects of making a 10 percent shift. This report presents findings based on Michigan's 2025 retail sales.

Key Economic Effects

With the modest change of redirecting 10 percent of Michigan's 2025 remote sales—equivalent to about $2.8 billion[1] excluding in-store pickups and deliveries—Michigan consumers could:

- Increase Michigan employment by over **14,000 jobs**
- Boost labor income (salary and benefits) by nearly **$674.0 million**
- Contribute **$1.1 billion** in value-added to the state's economy
- Generate **$1.7 billion** in gross economic output

[1] Statistics on employees and wages does not include nonemployers.

[2] See Appendix B: Overall Retail Economy for additional information on retail industry establishments and employment.

[3] Statistics on retail establishments include 58,759 nonemployers. Nonemployer data comprises businesses without paid employees (other than the owner[s]) and receipts of $1,000 or more. They are often sole proprietorships or partnerships and comprise a substantial portion of retail activity.

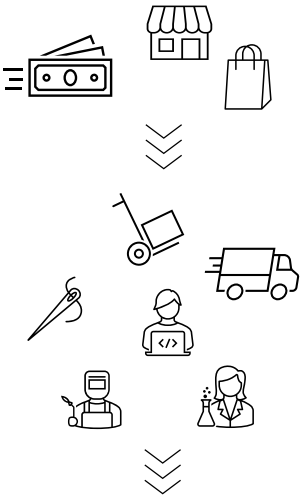
[4] Michigan e-commerce sales calculated using the percentage of national retail sales from e-commerce.

Economic Impact

PSC used national-level data to generate Michigan retail sales estimates and modeled the 10 percent shift from remote sales to in-person sales using Impact Analysis for Planning (IMPLAN), an input-output modeling tool that traces transactions among and between industry sectors to quantify how activity in one part of the economy affects others.[5]

Key Terms

For this analysis, PSC focused on the direct, indirect, and induced effects to calculate total economic impacts. Below is a visual representation of the three effects.



Direct effects: Economic activity generated directly through an industry's employment and operations. For this study, the direct effect is generated through an increase in Michigan-based brick-and-mortar retail sales.

Indirect effects: Economic effects stemming from business-to-business purchases in the supply chain. More spending at local brick-and-mortar businesses will impact those businesses' purchases of goods and services from other local businesses, which will support jobs and labor income in those industries. For example, retailers will have additional dollars they could spend on professional services such as marketing and IT support. Additionally, more spending at brick-and-mortar stores in Michigan may lead to an increase in spending with Michigan wholesalers and manufacturers.

Induced effects: Economic effects stemming from household spending of labor income after adjusting for taxes, savings, and income that leaks out of the region from commuting workers. Induced effects of more local spending may include an increase in local employment and wages which may impact household spending on housing, utilities, childcare, groceries, and other local goods and services.

In IMPLAN, each of these effects are measured using four economic indicators:

Employment: Number of annual full- and part-time jobs in affected industries

Labor income: Total value of employee and proprietor compensation (excluding retained and distributed profits)

Value-added: Regional income, also called gross state product (GSP), which considers labor income, proprietor income (including retained and distributed profits), other property income, and net government income (taxes minus transfers)

[5] See Appendix C: Methodology for a more detailed explanation of PSC's analysis.

Output: The value of production by an industry, which can also be described as annual revenues (value of sales transactions) plus net change in inventories

Findings

Shifting $2.8 billion of 2025 spending on out-of-state e-commerce purchases to in-person Michigan retail sales would support 10,173 direct Michigan jobs, generating $420.5 million in direct labor income for the state's economy. This shift in spending from outside of Michigan to in-person regional spending would also support $714.2 million in direct value-added and $974.3 million in direct output. Overall, the shift would support 14,064 Michigan jobs, $673.7 million in labor income, $1.1 billion in value-added, and $1.7 billion in output (Exhibit 1)

EXHIBIT 1. Total Economic Impact of Shifting 10 Percent of 2025 Remote Sales to Local Sales

Impact Type	Employment	Labor Income (in millions)	Value-Added (in millions)	Output (in millions)
Direct effects	10,173	$420.5	$714.2	$974.3
Indirect effects	1,453	$105.9	$162.3	$304.8
Induced effects	2,438	$147.3	$272.0	$457.8
Total effects	**14,064**	**$673.7**	**$1,148.5**	**$1,736.9**

Source: IMPLAN model 2024 data; amounts show in 2025 dollars.

Multipliers

By dividing total effects by direct effects, multipliers are calculated to demonstrate how the $2.8 billion shift ripples through Michigan's broader economy. The employment multiplier of 1.4 indicates that for every ten jobs supported by the direct shift of dollars, an additional four jobs are supported. Likewise, the output multiplier of 1.8 denotes that for every $10 shifted another $8 is generated in output through indirect and induced effects (Exhibit 2).

For every $10 shifted another $8 is generated in output through indirect and induced effects.

EXHIBIT 2. Multipliers by Economic Indicator

Multipliers	Employment	Labor Income	Value-Added	Output
	1.4	1.6	1.6	1.8

Source: IMPLAN model 2024 data

Taxes

Shifting 10 percent of purchases from out-of-state online transactions to local retailers would also generate more taxes for the state. This shift would generate $137.6 million in direct state and

local taxes and an additional $34.8 million in indirect and induced state and local taxes for a total state and local tax effect of $172.4 million (Exhibit 3).

EXHIBIT 3. Effect of 10 Percent Shift to Local Spending on State and Local Taxes

Impact	Sub County/County Taxes (in millions)	State Taxes (in millions)
Direct effects	$57.2	$80.4
Indirect effects	$3.0	$6.1
Induced effects	$9.8	$15.9
Total effects	**$70.1**	**$102.4**

Note: Columns may not total due to rounding.
Source: IMPLAN model 2024 data

Impacted Industries

Retail businesses directly benefit from this shift in spending, with the highest impacts occurring in general merchandise stores, electronics and appliance stores, and clothing and clothing accessory stores. In addition to the retail businesses, due to the indirect and induced effects of the shift in spending, other industries are also impacted. The nonretail industries most impacted by this change are shown below by employment, value-added, and output.

Employment

In terms of employment, the industries most affected by the 10 percent shift include retail businesses such as general merchandise stores, electronics and appliance stores, and clothing and clothing accessories stores. However, due to indirect and induced effects, industries such as other real estate, hospitals, warehousing and storage, full- and limited-service restaurants, management of companies and enterprises, and employment services also see a sizable employment impact, adding more than 1,100 jobs across these sectors. (Exhibit 4).

EXHIBIT 4. Top 20 Industries Benefiting from Shifting 10 Percent of 2025 Remote Sales to Local Sales, by Employment

IMPLAN Sector	Direct	Indirect and Induced	Total
Retail - General merchandise stores	2,957	75	3,032
Retail - Electronics and appliance stores	1,902	11	1,914
Retail - Clothing and clothing accessories stores	1,850	28	1,879
Retail - Miscellaneous store retailers	1,316	46	1,362
Retail - Sporting goods, hobby, musical instrument and book stores	657	21	678
Retail - Health and personal care stores	613	36	648
Retail - Furniture and home furnishings stores	450	12	463
Other real estate	-	408	408

IMPLAN Sector	Direct	Indirect and Induced	Total
Retail - Building material and garden equipment and supplies stores	257	21	278
Retail - Motor vehicle and parts dealers	170	44	214
Hospitals	-	151	151
Warehousing and storage	-	150	150
Full-service restaurants	-	140	140
Management of companies and enterprises	-	139	139
Employment services	-	132	132
Limited-service restaurants	-	126	126
Couriers and messengers	-	123	123
Religious organizations	-	98	98
Offices of physicians	-	83	83
All other food and drinking places	-	77	77
Total top 20	**10,173**	**1,921**	**12,094**
Total remainder of industries	-	1,969	1,969
Total overall	**10,173**	**3,891**	**14,064**

Source: IMPLAN model 2024 data
Note: Totals may not sum due to rounding

Value-Added

In terms of value-added (GSP), in addition to impacting retail industries, some of the top industries benefiting from indirect and induced value-added were owner-occupied dwellings, other real estate, management of companies and enterprises, hospitals, and warehousing and storage (Exhibit 5).

EXHIBIT 5. Top 20 Industries Benefiting from Shifting 10 Percent of 2025 Remote Sales to Local Sales, by Value-Added

IMPLAN Sector	Direct (in millions)	Indirect and Induced (in millions)	Total (in millions)
Retail - General merchandise stores	$199.9	$5.0	$205.0
Retail - Electronics and appliance stores	$124.8	$0.8	$125.6
Retail - Clothing and clothing accessories stores	$121.3	$1.8	$123.1
Retail - Health and personal care stores	$63.6	$3.7	$67.4
Retail - Furniture and home furnishings stores	$60.7	$1.7	$62.4
Retail - Miscellaneous store retailers	$49.1	$1.7	$50.8
Owner-occupied housing	$0.0	$48.8	$48.8

IMPLAN Sector	Direct (in millions)	Indirect and Induced (in millions)	Total (in millions)
Other real estate	$0.0	$44.0	$44.0
Retail - Building material and garden equipment and supplies stores	$33.8	$2.8	$36.6
Retail - Motor vehicle and parts dealers	$28.7	$7.5	$36.2
Retail - Sporting goods, hobby, musical instrument and book stores	$32.2	$1.0	$33.3
Management of companies and enterprises	$0.0	$24.3	$24.3
Hospitals	$0.0	$18.3	$18.3
Warehousing and storage	$0.0	$10.9	$10.9
Monetary authorities and depository credit intermediation	$0.0	$9.7	$9.7
Offices of physicians	$0.0	$8.7	$8.7
Insurance carriers, except direct life	$0.0	$8.4	$8.4
Employment services	$0.0	$7.9	$7.9
Full-service restaurants	$0.0	$6.6	$6.6
Tenant-occupied housing	$0.0	$6.5	$6.5
Total top 20	**$714.2**	**$220.1**	**$934.4**
Total remainder of industries	$0.0	$214.1	$214.1
Total overall	**$714.2**	**$434.3**	**$1,148.5**

Source: IMPLAN model 2024 data
Note: Totals may not sum due to rounding

Output

In terms of output, the top impacted industries were in the retail sector, with general merchandise stores contributing $288.2 million in total output, followed by clothing and clothing accessories stores ($220.2 million) and electronic and appliance stores ($132.3 million). The top nonretail industries affected by the 10 percent shift in sales from remote to in-person included other real estate ($98.9 million), owner-occupied housing ($56.9 million), and management of companies and enterprises at $37.0 million (Exhibit 6).

EXHIBIT 6. Top 20 Industries Benefiting from Shifting 10 Percent of 2025 Remote Sales to Local Sales, by Output

IMPLAN Sector	Direct (in millions)	Indirect and Induced (in millions)	Total (in millions)
Retail - General merchandise stores	$281.1	$7.1	$288.2
Retail - Clothing and clothing accessories stores	$216.9	$3.3	$220.2
Retail - Electronics and appliance stores	$131.5	$0.8	$132.3
Other real estate	$0.0	$98.9	$98.9
Retail - Miscellaneous store retailers	$85.6	$3.0	$88.5
Retail - Health and personal care stores	$79.2	$4.6	$83.8
Retail - Furniture and home furnishings stores	$64.6	$1.8	$66.4
Owner-occupied housing	$0.0	$56.9	$56.9
Retail - Motor vehicle and parts dealers	$37.5	$9.8	$47.4
Retail - Sporting goods, hobby, musical instrument and book stores	$40.4	$1.3	$41.7
Retail - Building material and garden equipment and supplies stores	$37.6	$3.1	$40.7
Management of companies and enterprises	$0.0	$37.0	$37.0
Hospitals	$0.0	$33.9	$33.9
Insurance carriers, except direct life	$0.0	$17.9	$17.9
Monetary authorities and depository credit intermediation	$0.0	$16.0	$16.0
Warehousing and storage	$0.0	$15.6	$15.6
Electric power transmission and distribution	$0.0	$14.8	$14.8
Offices of physicians	$0.0	$14.2	$14.2
Internet publishing and broadcasting and web search portals	$0.0	$14.0	$14.0
Limited-service restaurants	$0.0	$13.8	$13.8
Total top 20	**$974.3**	**$367.7**	**$1,342.1**
Total remainder of industries	$0.0	$394.8	$394.8
Total overall	**$974.3**	**$762.6**	**$1,736.9**

Source: IMPLAN model 2024 data
Note: Totals may not sum due to rounding

How These Changes Hit Home for Michiganders

When we shift just 10 percent of our online spending to Michigan local storefronts, we build local paychecks, create and support statewide employment, and generate additional tax dollars. Here is how those shifted dollars would impact Michigan's economy:

Michigan would generate enough tax revenue to rebuild and maintain over 108,000 miles of roads statewide

We would create enough local labor income to cover a year of rent for over 48,000 Michigan households

The income generated could fund a full year of early childhood care for over 50,000 working families

For every 100 Michigan residents who shift 10 percent of their online spending to local storefronts, $6,700 in labor income and $1,700 in state and local taxes are generated

Every $100 spent at a local retailer instead of an out-of-state online store puts $24 of new income into Michigan

The shift would create job opportunities for 5 percent of Michigan's unemployed workforce

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Appendix A: Industry Classifications and Model Inputs

EXHIBIT A1. Industry Classifications and Model Inputs, 2025

IMPLAN Industry Code	IMPLAN Industry Description	2022 North American Industrial Classification System (NAICS) Code	Model Input—10% of Electronic Sales
394	Retail—General merchandise stores	455	$1,048,923,825
387	Retail—Electronics and appliance stores	449	$445,752,795
392	Retail—Clothing and clothing accessories stores	458	$435,509,378
390	Retail—Health and personal care stores	456	$239,129,930
395	Retail—Miscellaneous store retailers	459	$159,344,373
385	Retail—Motor vehicle and parts dealers	441	$150,744,954
386	Retail—Furniture and home furnishings stores	449	$126,603,544
388	Retail—Building material and garden equipment and supplies stores	444	$106,124,210
393	Retail—Sporting goods, hobby, musical instrument, and book stores	459	$89,082,962
Total 10 percent change modeled for study			**$2,801,215,971**
Retail industries not included in the IMPLAN model			
389	Retail—Food and beverage stores	445	$112,464,688
391	Retail—Gasoline stores	457	$8,450,390

Source: PSC calculated the 10 percent shift using a combination for the sources listed in the references section. See Appendix C: Methodology for more details.
Note: Previous studies have included an industry called “nonstore retailers,” which are businesses that sell goods directly to consumers outside of a traditional brick-and-mortar storefront. These include e-commerce websites and direct-selling companies. In 2022, NAICS discontinued the use of nonstore retailers as an industry and redistributed these industries throughout the retail industry classifications based on types of products sold. For the 2026 report, PSC updated its methodology to also redistribute nonstore retailer dollars among the other retail industries.

Appendix B: Overall Retail Economy

In addition to the retail industries directly impacted by switching out-of-state remote sales to local in-person sales, food and beverage stores, gasoline stations, and food service and drinking places are also included when examining the overall retail economy. Exhibit B1 shows the number of establishments by retail industry and by nonemployer and employer status. It also includes total number of establishments (nonemployer plus employer) and total employment for the industries included in the overall retail economy.

EXHIBIT B1. Industry Classifications of Overall Retail Economy, 2025

NAICS Code	Category	Nonemployer Establishments	Employer Establishments	Total QCEW† and Nonemployer Establishments	Employment (QCEW only)
441	Motor vehicle dealers	5,604	3,693	9,297	64,486
444	Building materials and garden supply stores	1,556	2,259	3,815	46,645
445	Food and beverage stores‡	4,900	5,537	10,437	75,069
449	Furniture, home furnishings, electronics, and appliance stores	2,427	2,033	4,460	19,166
455	General merchandise stores	4,937	3,207	8,144	112,367
456	Health and personal care stores	8,960	3,830	12,790	31,283
457	Gasoline stations‡	326	3,314	3,640	30,299
458	Clothing and clothing accessories stores	8,526	2,884	11,410	24,699
459	Sporting goods, hobby, book, music, and miscellaneous retailers	21,523	5,871	27,394	45,935
722	Food service and drinking places‡	15,884	19,379	35,263	330,399
Total all retail		**74,643**	**52,007**	**126,650**	**780,348**

Sources: BLS 2025; U.S. Census Bureau 2025
Note: † Quarterly Census of Employment and Wages is a BLS-managed program providing quarterly comprehensive counts of employment and wages for workers covered by state unemployment insurance laws and the Unemployment Compensation for Federal Employees program.
Note: ‡ Food and beverage stores, gasoline stations, food service and drinking places were not included in the IMPLAN model.

Appendix C: Methodology

This analysis examined the impact of shifting 10 percent of estimated out-of-state remote purchases to local sales. Any purchases made with an out-of-state merchant, including sales from e-commerce, e-marketplace sellers (those who are an intermediary and never handle goods), catalog orders, mail orders, call centers, and television shopping channels, are considered remote purchases.

U.S. Remote Sales

According to the U.S. Census Bureau, 2025 national e-commerce sales were $1.23 trillion, which is 16.4 percent of total retail sales. In all, the census data provide estimates of e-commerce sales for 11 retail subcategories, including nonstore retailers. Due to the elimination of this industry in the 2022 NAICS codes and subsequently the 2024 IMPLAN codes, the sales for nonstore retailers were distributed proportionately among the other ten retail subcategories, which are listed in Exhibit A1. The estimate for total e-commerce in the electronics and appliance subcategory was suppressed. PSC estimated the amount for this subcategory based on data available for the other industries (U.S. Census Bureau May 2026a).

Mail Orders and Other Remote Sales

E-commerce sales are the majority of remote purchases, but there is a portion of remote sales outside of e-commerce. Other remote sales include catalog orders, mail orders, and orders from television shopping channels. In 2025, these sales totaled $362.8 billion, representing 4.8 percent of total US retail sales. This share was used to estimate Michigan's other remote sales. These other remote sales are categorized within nonstore retailers but are spent among various nonstore businesses with different primary business activities. To distribute these sales across the various nonstore businesses, PSC relied on the newly released Annual Integrated Economic Survey (AIES),[6] which replaces the discontinued Annual Retail Trade Survey (ARTS) after its 2022 data-year release.[7] According to the 2023 data (the most recent data-year of the new survey), within electronic shopping and mail-order houses—a subcategory of the nonstore retail category—there were $1.2 trillion in electronic shopping and mail-order sales, of which 76 percent was electronic shopping and 24 percent was mail-order sales (U.S. Census Bureau 2026 and U.S. Census Bureau 2026a). While census data provides information on e-commerce sales for each retail subcategory (Exhibit A1), it provides limited data on the breakdown in nonstore retailers by subcategory, which constitute electronic shopping and mail-order sales. This is largely due to confidentiality or methodological reasons. Where data was available, PSC used remote sales

[6] The fully published 2023 dataset was released on February 26, 2026.

[7] A notice about the discontinuation of the ARTS survey is published on the U.S. Census Bureau's website here: https://www.census.gov/programs-surveys/arts.html#:~:text=The%20Annual%20Retail%20Trade%20Survey,change%20impacts%20the%20following%20tables

among the various nonstore business categories to estimate the share of e-commerce and mail-order sales.

After determining distributions with the available data, there was $111.5 billion in unallocated nonstore sales, of which $47.4 billion was electronic shopping and $64.2 billion was mail-order sales. Categories that were suppressed included gas stations, furniture and home furnishings stores, and electronics and appliance stores. To distribute these unallocated sales, PSC used some data from the discontinued ARTS datasets on historical trends in sales and shares.

Michigan Remote Sales

After PSC developed industry profiles for remote spending for the national data, they then calculated the total remote sales for Michigan. Total Michigan retail sales in 2022 were $190.5 billion. To estimate 2025 total retail sales, PSC assumed Michigan retail sales grew at the same rate as U.S. retail sales between 2022 and 2025. PSC thus estimated that 2025 Michigan retail sales were $203.3 billion (U.S. Census Bureau June 2026).

PSC assumed Michigan's share of e-commerce sales in 2025 was the same as its share of total national retail sales (16.4 percent), or $33.4 billion. PSC then applied the 4.8 percent in other remote sales to Michigan, estimated to be $9.8 billion. Overall, Michigan e-commerce and mail-order sales were estimated to be $43.2 billion, or 21.2 percent of total retail sales in Michigan.

Finally, PSC examined available data sources to isolate and estimate e-commerce sales generated by brick-and-mortar stores (e.g., online order for store pickup or deliveries sourced in store). The U.S. Census Bureau retail sales methodology does partially differentiate between e-commerce sales by brick-and-mortar stores, whose sales are reported under store categories, and those from warehouse distribution, whose sales are reported under nonstore categories. However, the differentiation is limited to retailers with only brick-and-mortar sales and to nonstore retailers who generate all sales via distribution centers (U.S. Census Bureau n.d.).

For retailers with multichannel distribution, those with both brick-and-mortar stores and warehouse distribution, all e-commerce sales, regardless of whether sourced in store or via a distribution center, were reported under nonstore categories (U.S. Census Bureau n.d.). As a result, total brick-and-mortar e-commerce sales can only be estimated for the brick-and-mortar–only segment, which mainly includes small- to medium-sized independent retailers. PSC's estimate of total e-commerce brick-and-mortar sales for this retail segment is $13.9 billion. There are currently no other publicly available datasets with sufficient detail to estimate e-commerce brick-and-mortar sales for multichannel retailers. After excluding remote sales stemming from store pickups and deliveries, they estimated Michigan's total e-commerce sales at approximately $29.3 billion.

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