



THE COUNTY OF

SAN BERNARDINO

RETAIL OVERVIEW



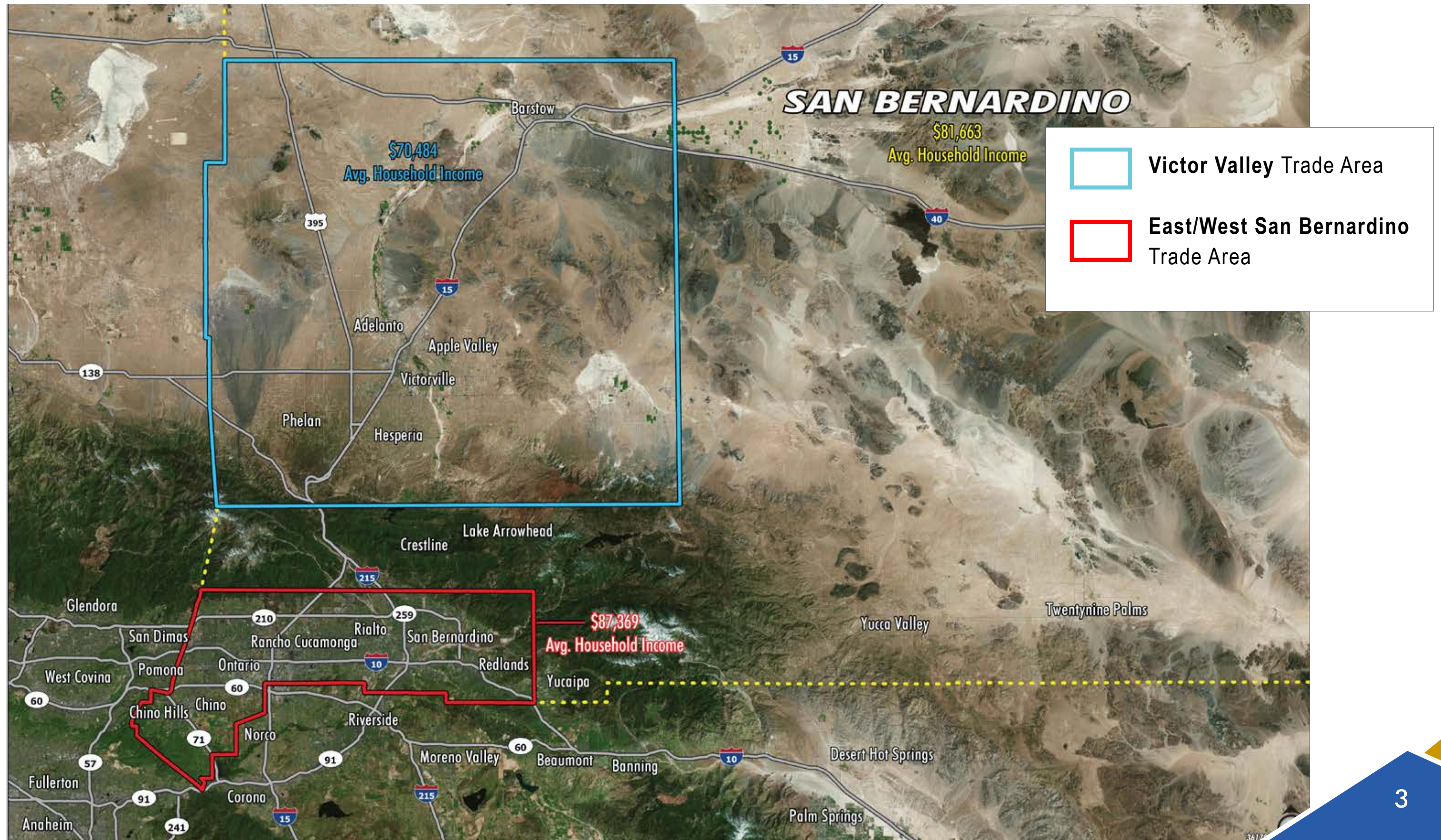
YEAR END 2018



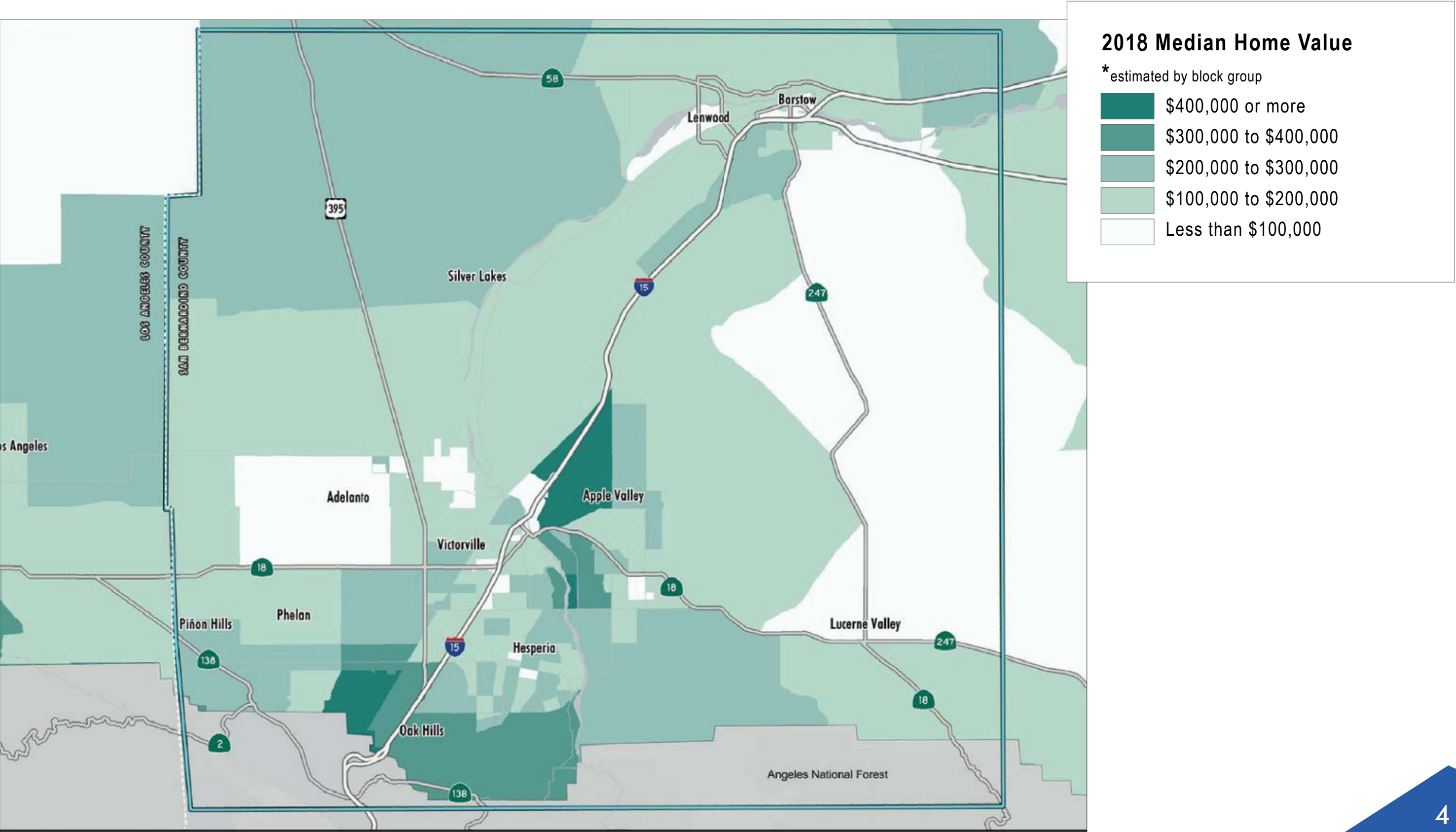
THE TRADE AREA



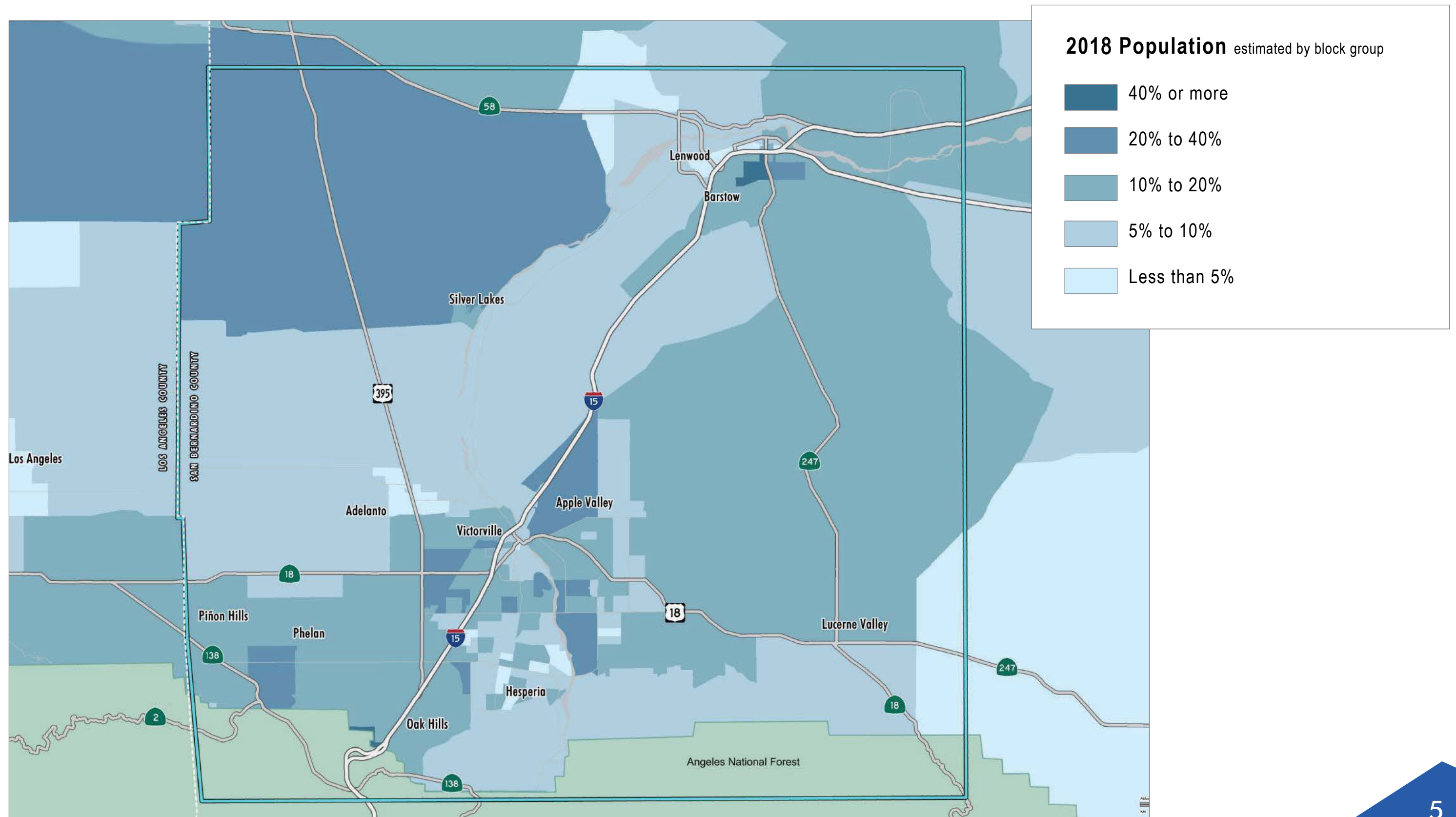
THE TRADE AREA



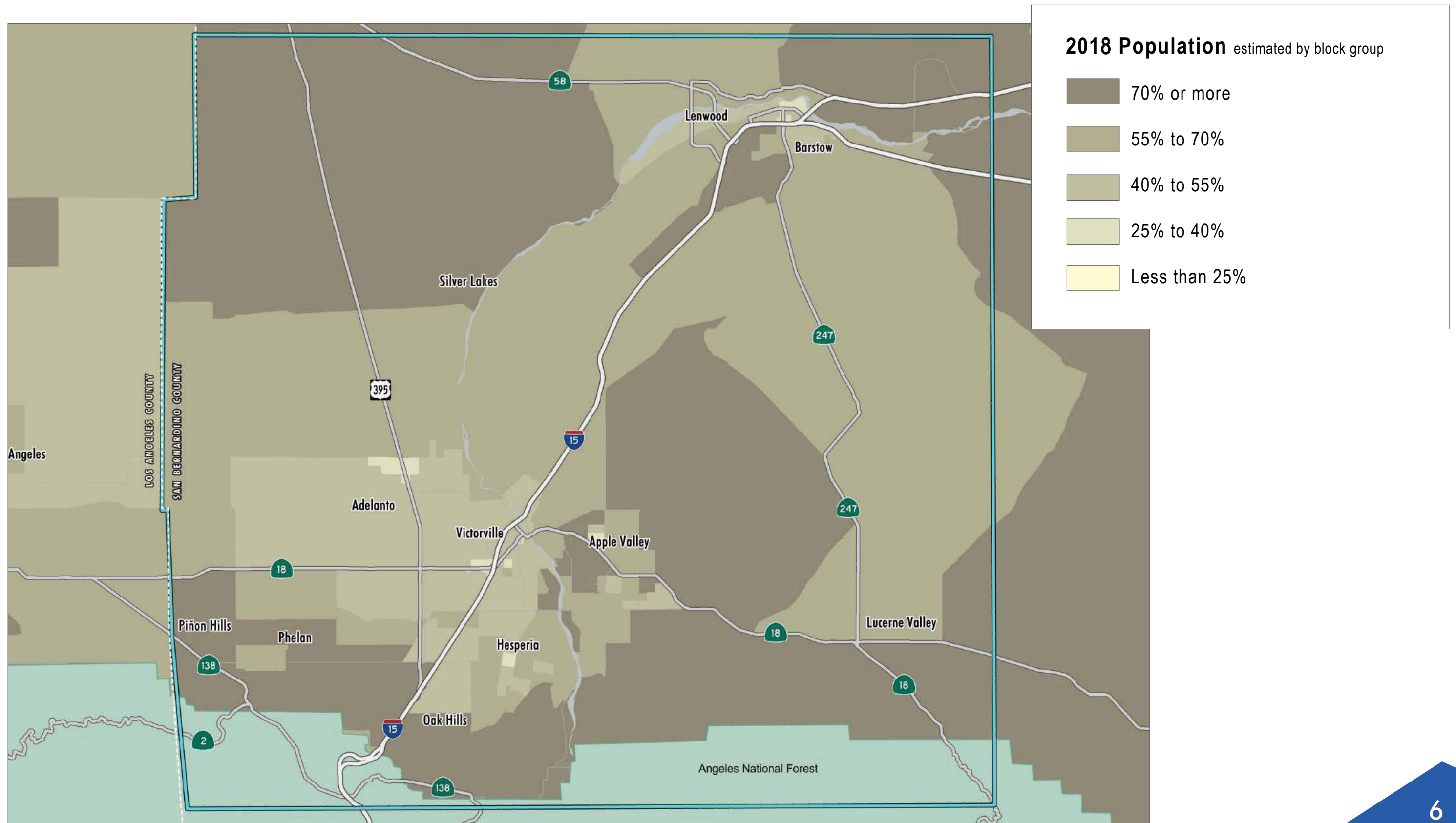
VICTOR VALLEY – MEDIAN HOME VALUE



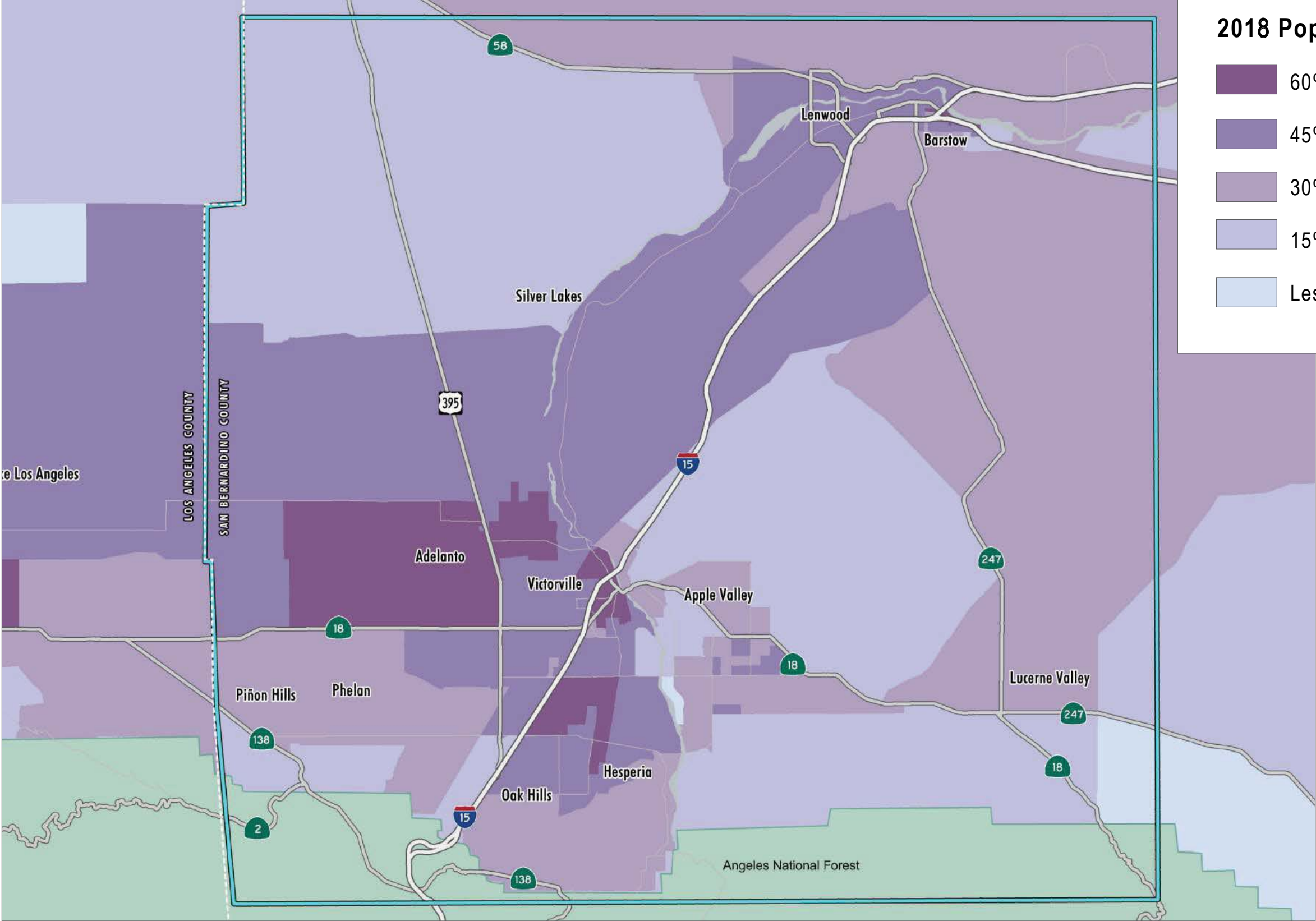
VICTOR VALLEY – ASIAN POPULATION



VICTOR VALLEY – CAUCASIAN POPULATION



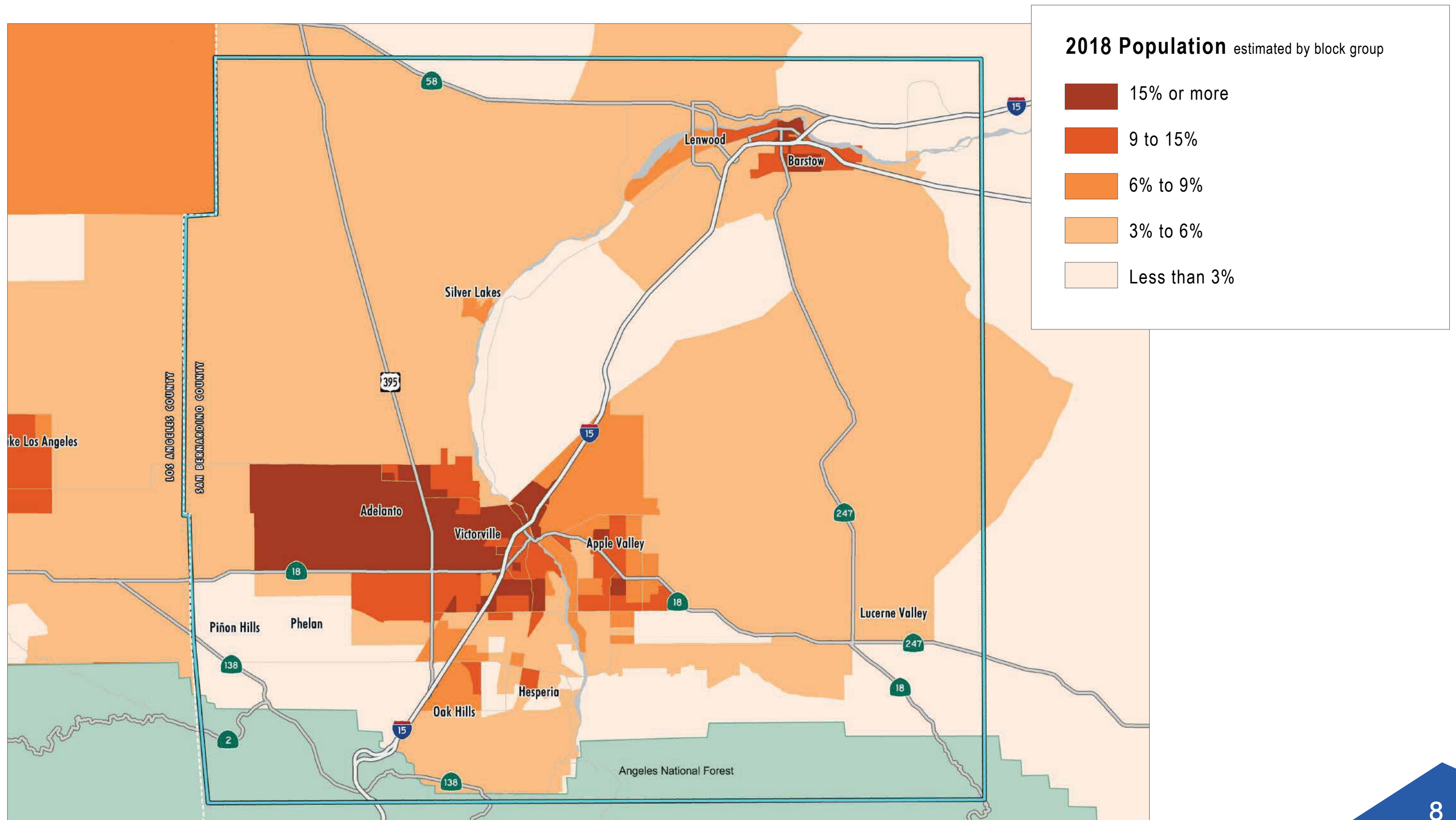
VICTOR VALLEY – HISPANIC POPULATION



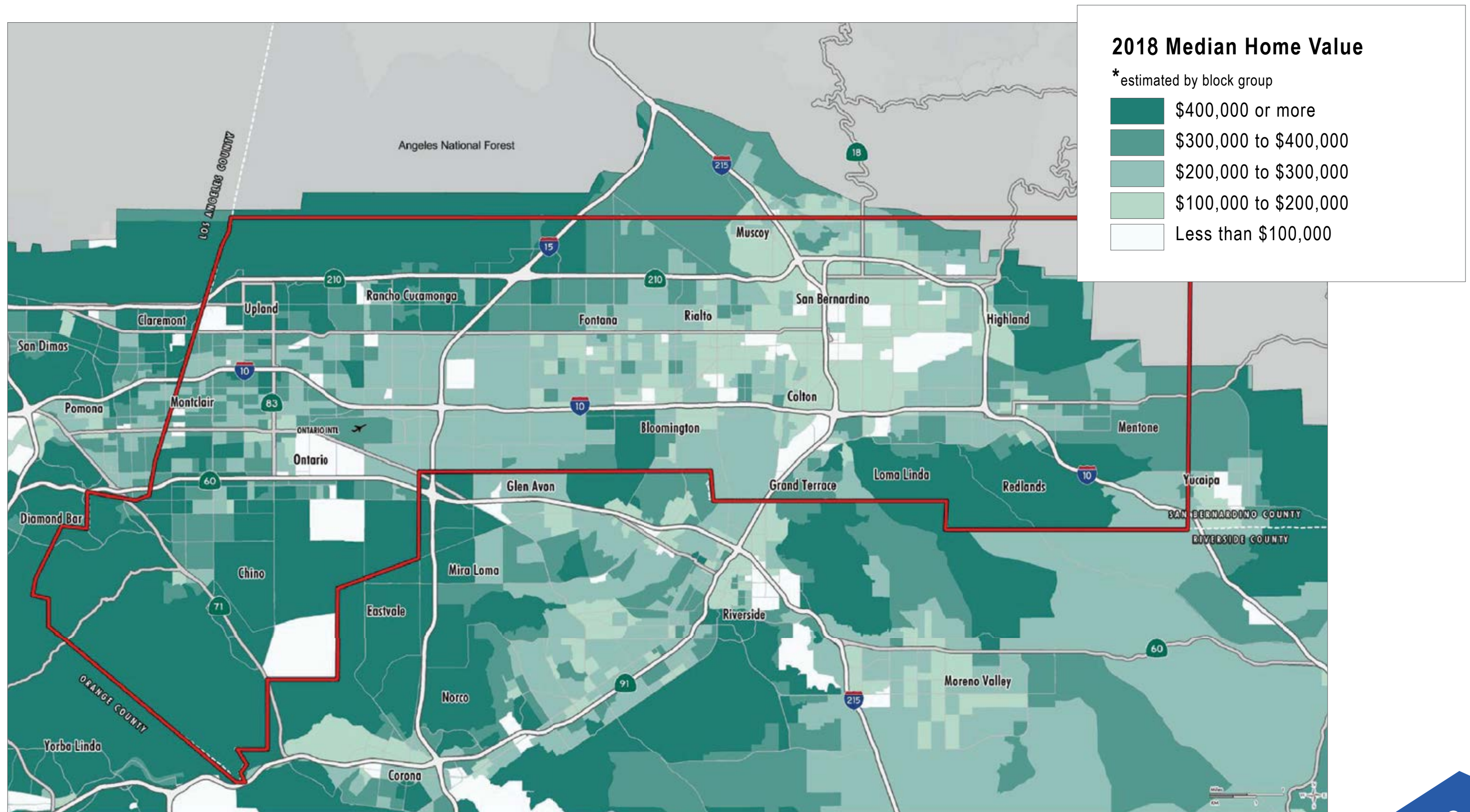
2018 Population estimated by block group

- 60% or more
- 45% to 60%
- 30% to 45%
- 15% to 30%
- Less than 15%

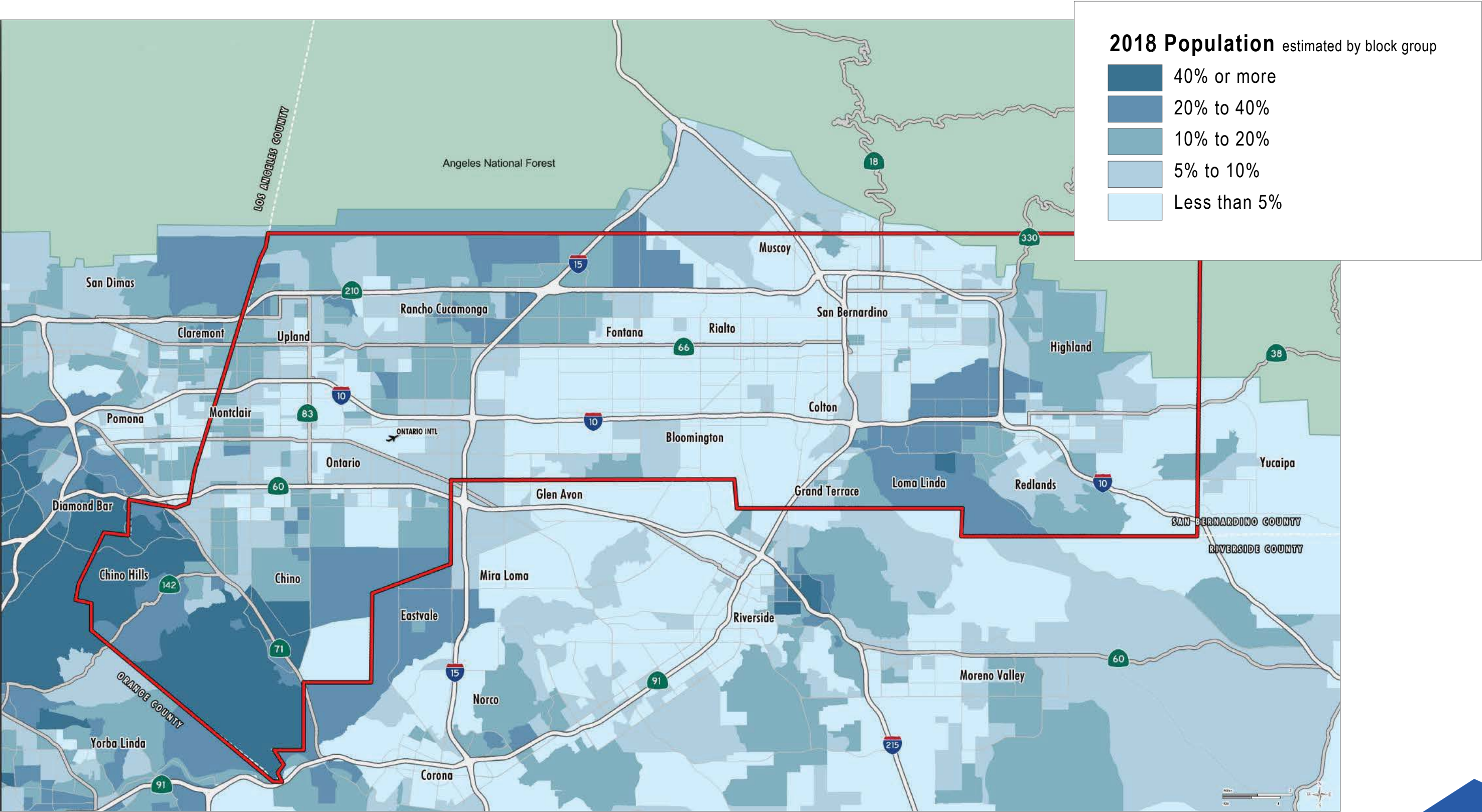
VICTOR VALLEY – AFRICAN AMERICAN POPULATION



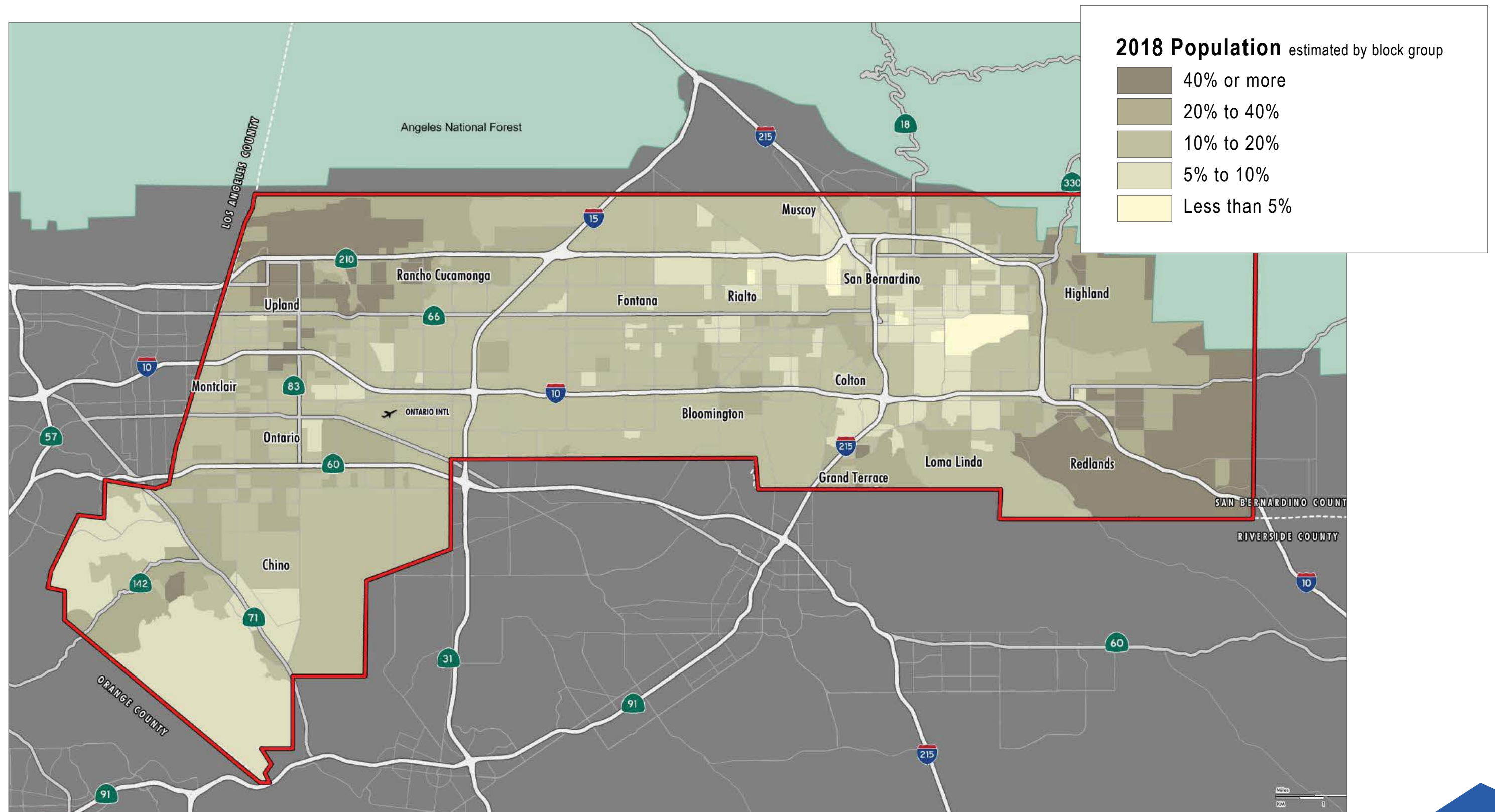
EAST/WEST SAN BERNARDINO – MEDIAN HOME VALUE



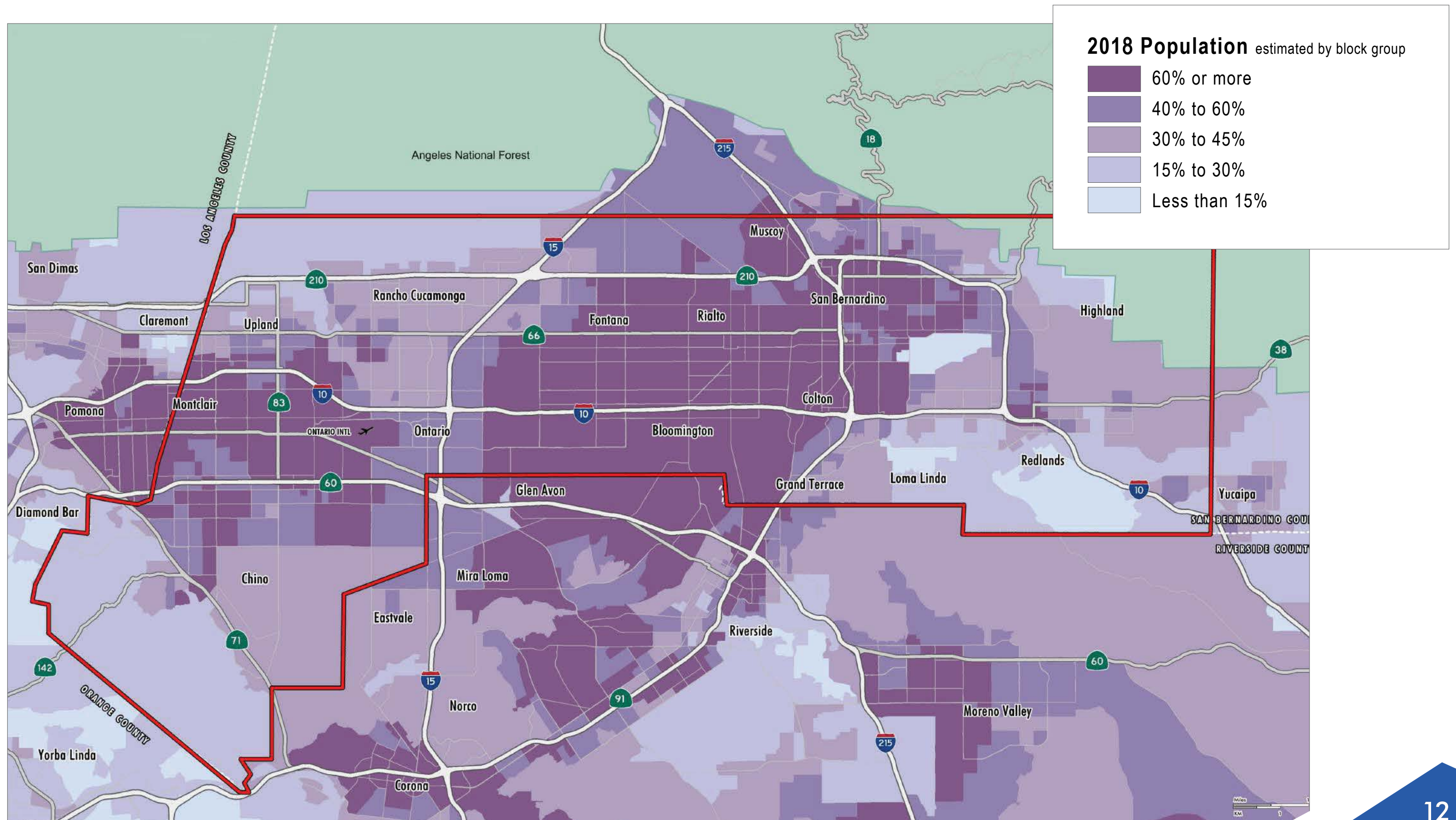
EAST/WEST SAN BERNARDINO – ASIAN POPULATION



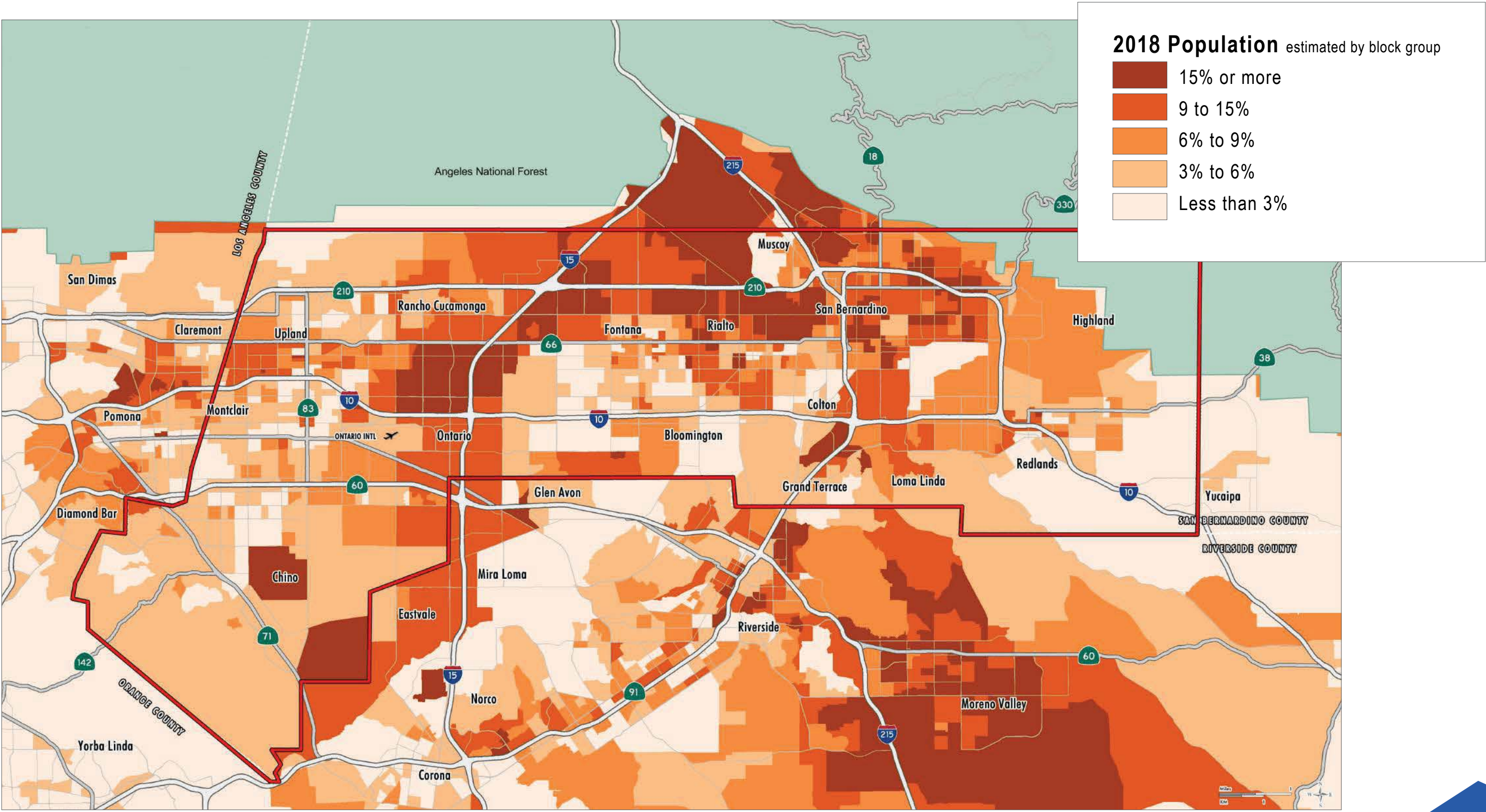
EAST/WEST SAN BERNARDINO – CAUCASIAN POPULATION



EAST/WEST SAN BERNARDINO – HISPANIC POPULATION



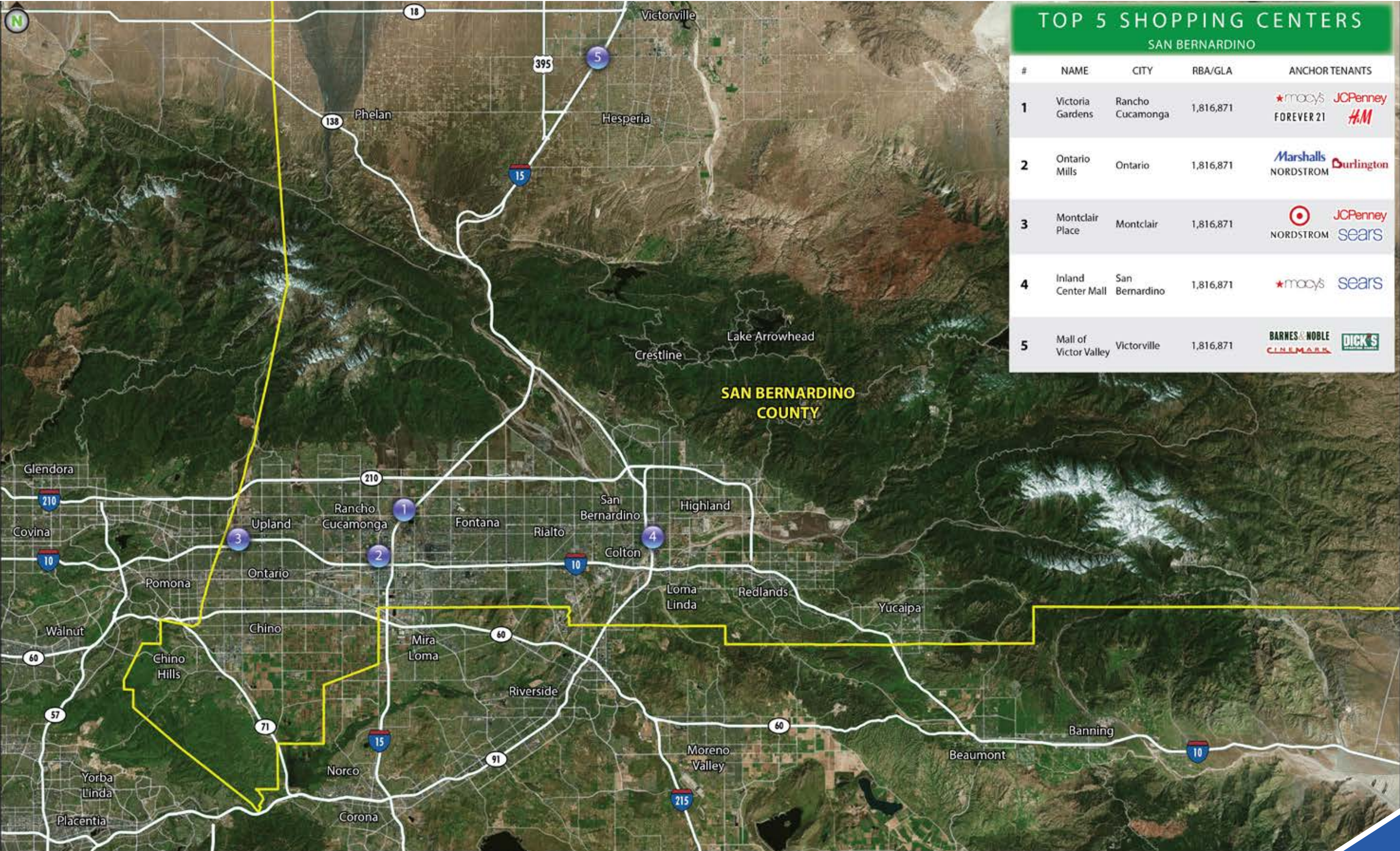
EAST/WEST SAN BERNARDINO – AFRICAN AMERICAN POPULATION





MAJOR RETAIL

MAJOR SHOPPING CENTERS



VICTOR VALLEY AREA

Major Employers

Employees

| | | |
|----|------------------------------|-------|
| #1 | Saint Mary Medical Center | 1,453 |
| #2 | Desert Valley Hospital | 686 |
| #3 | Victor Valley Global Med Ctr | 523 |
| #4 | Barstow Station | 400 |
| #5 | Walmart Supercenter | 400 |



REDLANDS AREA



RANCHO CUCAMONGA/ONTARIO AREA



MONTCLAIR AREA

| | Major Employers | Employees |
|----|--------------------------------|-----------|
| #1 | Montclair Hospital Medical Ctr | 380 |
| #2 | Nordstrom | 380 |
| #3 | Macy's | 370 |
| #4 | JCPenney | 340 |
| #5 | Jeff Kerber Pool Blasting | 300 |



CHINO HILLS AREA

Major Employers

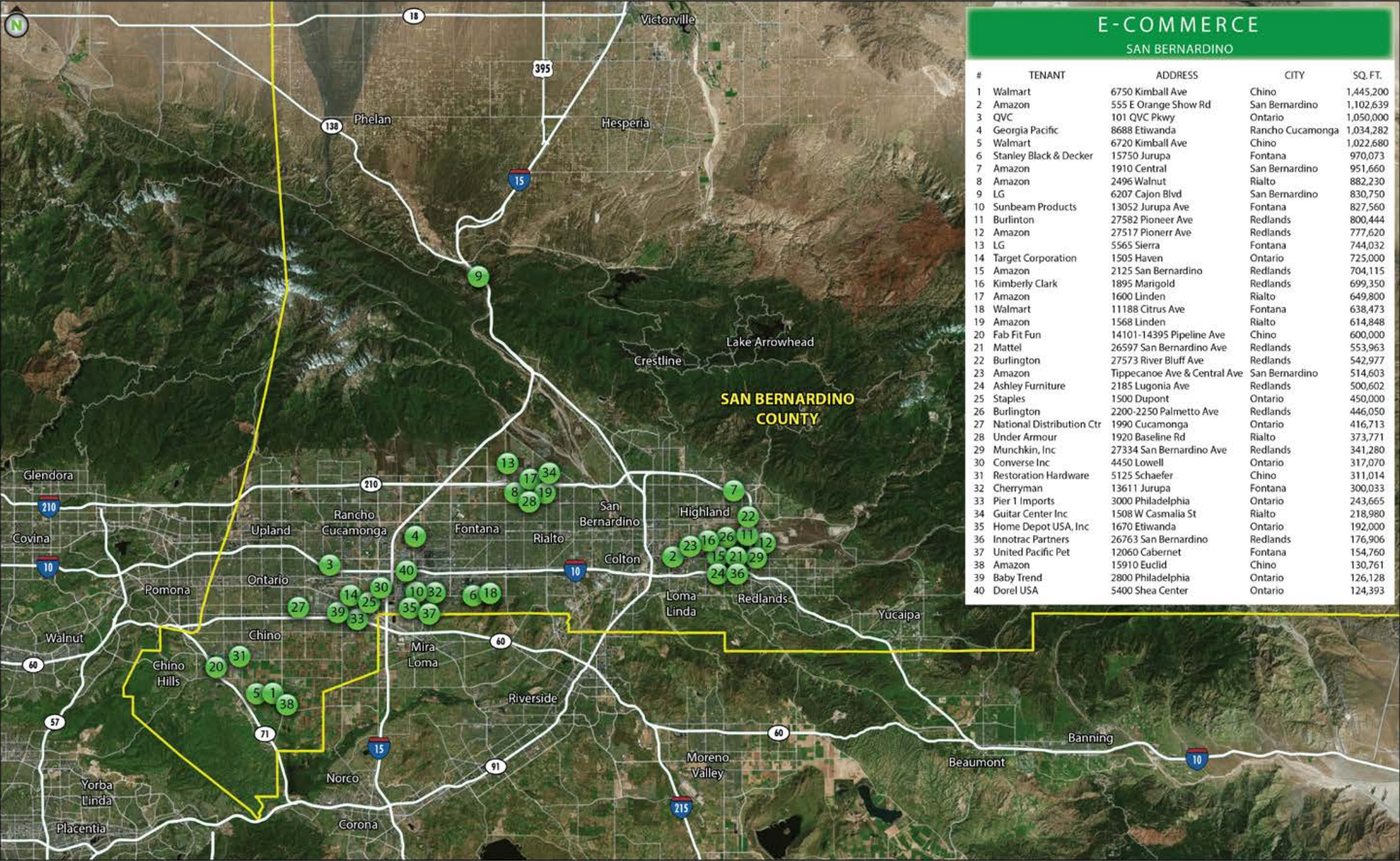
Employees

| | | |
|----|-----------------------------|-----|
| #1 | Costco | 300 |
| #2 | Act Construction Inc | 200 |
| #3 | BJ's Restaurant & Brewhouse | 200 |
| #4 | Los Serranos Golf & Country | 150 |
| #5 | Lowe's Home Improvement | 140 |





E-COMMERCE





GAP ANALYSIS

OUR APPROACH

The **RETAIL OPPORTUNITY GAP REPORT** examines the market to determine which types of product could potentially expand or consolidate.

An opportunity gap occurs when, in a certain region, there is a difference between household expenditures and their corresponding retail sales estimates.

This gap indicates that residents are spending money outside their immediate market, meaning that demand is exceeding supply.

The opposite occurs when the household expenditures in a certain region are lower than retail sales estimates. This indicates that retailers are attracting out-of-towners to their stores.



GAP REPORT

SAN BERNARDINO COUNTY



TOTAL GAP

**-\$3.0
BILLION
PER YEAR**



**MOTOR
VEHICLE**

**-\$249.6
MILLION
PER YEAR**



FURNITURE

**-\$246.2
MILLION
PER YEAR**



**FOOD &
BEVERAGE**

**-\$389.2
MILLION
PER YEAR**



**BUILDING &
GARDEN SUPPLY**

**-\$750.0
MILLION
PER YEAR**



CLOTHING

**\$262.8
MILLION
PER YEAR**

GAP ANALYSIS

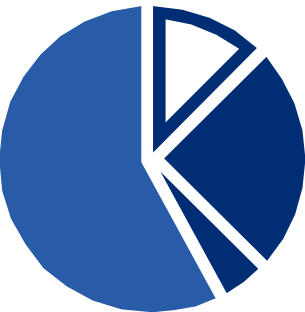
GAP REPORT
SAN BERNARDINO COUNTY



| | SALES | POTENTIAL | GAP | FACTOR | BUSINESSES | | SALES | POTENTIAL | GAP | FACTOR | BUSINESSES |
|---|----------|-----------|-----------|--------|------------|--|----------|-----------|-----------|--------|------------|
| Total Retail Sales (including Food and Drink Sales) | \$26.5B | \$23.5B | \$-3.0B | -6.0 | 12,373 | Clothing and Accessories Stores (448) | \$1.2B | \$1.5B | \$303.8M | 11.2 | 1,072 |
| Retail Trade Sales (44-45) | \$23.9B | \$21.2B | \$-2.7B | -6.0 | 8,604 | Clothing Stores (4481) | \$817.4M | \$1.1B | \$262.8M | 13.9 | 685 |
| Motor Vehicle and Parts Dealers (441) | \$4.7B | \$4.4B | \$-249.6M | -2.7 | 1,216 | Shoe Stores (4482) | \$267.4M | \$189.7M | \$-77.8M | -17.0 | 183 |
| Automobile Dealers (4411) | \$3.5B | \$3.5B | \$38.2M | 0.5 | 383 | Jewelry, Luggage and Leather Goods Stores (4483) | \$123.7M | \$242.5M | \$118.7M | 32.4 | 204 |
| Other Motor Vehicle Dealers (4412) | \$561.4M | \$541.2M | \$-20.1M | -1.8 | 157 | Sporting Goods, Hobby, Book and Music Stores (451) | \$663.0M | \$673.2M | \$10.1M | 0.8 | 465 |
| Auto Parts, Accessory and Tire Stores (4413) | \$648.6M | \$380.9M | \$-267.7M | -26.0 | 676 | Sporting Goods, Hobby and Music Instrument Stores (4511) | \$606.5M | \$582.4M | \$-24.1M | -2.0 | 408 |
| Furniture and Home Furnishing Stores (442) | \$1.0B | \$786.6M | \$-246.2M | -13.5 | 530 | Book, Periodical and Music Stores (4512) | \$56.5M | \$90.8M | \$34.3M | 23.3 | 57 |
| Furniture Stores (4421) | \$761.2M | \$409.3M | \$-351.9M | -30.1 | 256 | General Merchandise Stores (452) | \$4.5B | \$3.5B | \$-926.8M | -11.6 | 455 |
| Home Furnishings Stores (4422) | \$271.5M | \$377.3M | \$105.7M | 16.3 | 274 | Dept Stores excl Leased Depts (4521) | \$3.0B | \$2.1B | \$-863.1M | -17.0 | 180 |
| Electronics and Appliance Stores (443) | \$573.4M | \$780.3M | \$206.9M | 15.3 | 396 | Other General Merchandise Stores (4529) | \$1.5B | \$1.4B | \$-63.8M | -2.2 | 275 |
| Electronics and Appliance Stores (4431) | \$573.4M | \$780.3M | \$206.9M | 15.3 | 396 | Miscellaneous Store Retailers (453) | \$894.5M | \$787.2M | \$-107.4M | -6.4 | 1,216 |
| Building Material, Garden Equipment and Supply Stores (444) | \$2.0B | \$1.3B | \$-750.0M | -22.4 | 767 | Florists (4531) | \$16.3M | \$36.9M | \$20.6M | 38.7 | 107 |
| Building Material and Supplies Dealers (4441) | \$2.0B | \$1.2B | \$-789.9M | -24.6 | 665 | Office Supply, Stationery and Gift Stores (4532) | \$206.0M | \$180.2M | \$-25.9M | -6.7 | 293 |
| Lawn, Garden Equipment and Supply Stores (4442) | \$47.2M | \$87.1M | \$40.0M | 29.7 | 102 | Used Merchandise Stores (4533) | \$80.5M | \$82.8M | \$2.3M | 1.4 | 179 |
| Food and Beverage Stores (445) | \$3.8B | \$3.4B | \$-389.2M | -5.4 | 1,162 | Other Misc Store Retailers (4539) | \$591.7M | \$487.3M | \$-104.4M | -9.7 | 637 |
| Grocery Stores (4451) | \$3.5B | \$2.9B | \$-593.1M | -9.2 | 677 | Nonstore Retailers (454) | \$109.7M | \$617.1M | \$507.4M | 69.8 | 137 |
| Specialty Food Stores (4452) | \$119.6M | \$242.4M | \$122.8M | 33.9 | 241 | E-Shopping and Mail-Order Houses (4541) | \$82.4M | \$535.5M | \$453.1M | 73.3 | 63 |
| Beer, Wine and Liquor Stores (4453) | \$170.2M | \$251.2M | \$81.0M | 19.2 | 244 | Vending Machine Operators (4542) | \$2.8M | \$9.5M | \$6.7M | 54.6 | 16 |
| Health and Personal Care Stores (446) | \$1.1B | \$1.5B | \$361.4M | 14.2 | 625 | Direct Selling Establishments (4543) | \$24.5M | \$72.1M | \$47.6M | 49.3 | 58 |
| Health and Personal Care Stores (4461) | \$1.1B | \$1.5B | \$361.4M | 14.2 | 625 | Food Services and Drinking Places (722) | \$2.6B | \$2.3B | \$-283.9M | -5.8 | 3,769 |
| Gasoline Stations (447) | \$3.3B | \$1.9B | \$-1.4B | -27.5 | 563 | Special Food Services (7223) | \$14.3M | \$46.7M | \$32.4M | 53.1 | 49 |
| Gasoline Stations (4471) | \$3.3B | \$1.9B | \$-1.4B | -27.5 | 563 | Drinking Places-Alcohol (7224) | \$28.8M | \$48.3M | \$19.6M | 25.4 | 103 |

GAP REPORT

VICTOR VALLEY



TOTAL GAP

**-\$214.7
MILLION
PER YEAR**



**MOTOR
VEHICLE**

**\$136.2
MILLION
PER YEAR**



FURNITURE

**-\$5.0
MILLION
PER YEAR**



**FOOD &
BEVERAGE**

**-\$86.1
MILLION
PER YEAR**



**BUILDING &
GARDEN SUPPLY**

**-\$31.4
MILLION
PER YEAR**



CLOTHING

**\$93.2
MILLION
PER YEAR**

GAP ANALYSIS

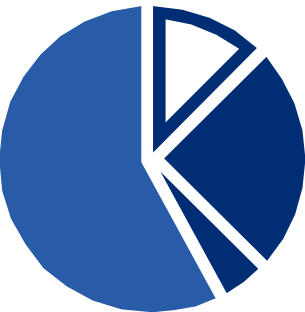
GAP REPORT
VICTOR VALLEY



| | SALES | POTENTIAL | GAP | FACTOR | BUSINESSES | | SALES | POTENTIAL | GAP | FACTOR | BUSINESSES |
|---|----------|-----------|-----------|--------|------------|--|----------|-----------|-----------|--------|------------|
| Total Retail Sales (including Food and Drink Sales) | \$4.5B | \$4.2B | \$-214.7M | -2.5 | 2,121 | Clothing and Accessories Stores (448) | \$140.7M | \$264.0M | \$123.3M | 30.5 | 158 |
| Retail Trade Sales (44-45) | \$4.0B | \$3.8B | \$-177.9M | -2.3 | 1,485 | Clothing Stores (4481) | \$96.1M | \$189.3M | \$93.2M | 32.6 | 103 |
| Motor Vehicle and Parts Dealers (441) | \$679.6M | \$815.8M | \$136.2M | 9.1 | 222 | Shoe Stores (4482) | \$30.9M | \$33.4M | \$2.5M | 3.9 | 28 |
| Automobile Dealers (4411) | \$478.1M | \$647.4M | \$169.3M | 15.0 | 58 | Jewelry, Luggage and Leather Goods Stores (4483) | \$13.7M | \$41.3M | \$27.7M | 50.3 | 28 |
| Other Motor Vehicle Dealers (4412) | \$105.3M | \$99.7M | \$-5.7M | -2.8 | 35 | Sporting Goods, Hobby, Book and Music Stores (451) | \$85.8M | \$118.8M | \$33.0M | 16.1 | 66 |
| Auto Parts, Accessory and Tire Stores (4413) | \$96.2M | \$68.7M | \$-27.4M | -16.6 | 129 | Sporting Goods, Hobby and Music Instrument Stores (4511) | \$77.0M | \$102.8M | \$25.9M | 14.4 | 61 |
| Furniture and Home Furnishing Stores (442) | \$145.5M | \$140.5M | \$-5.0M | -1.7 | 77 | Book, Periodical and Music Stores (4512) | \$8.8M | \$16.0M | \$7.1M | 28.8 | 5 |
| Furniture Stores (4421) | \$110.1M | \$73.2M | \$-37.0M | -20.2 | 38 | General Merchandise Stores (452) | \$726.1M | \$634.9M | \$-91.2M | -6.7 | 79 |
| Home Furnishings Stores (4422) | \$35.4M | \$67.4M | \$32.0M | 31.1 | 39 | Dept Stores excl Leased Depts (4521) | \$633.2M | \$376.0M | \$-257.2M | -25.5 | 34 |
| Electronics and Appliance Stores (443) | \$92.1M | \$138.9M | \$46.9M | 20.3 | 60 | Other General Merchandise Stores (4529) | \$92.9M | \$258.9M | \$166.0M | 47.2 | 45 |
| Electronics and Appliance Stores (4431) | \$92.1M | \$138.9M | \$46.9M | 20.3 | 60 | Miscellaneous Store Retailers (453) | \$155.4M | \$143.3M | \$-12.1M | -4.0 | 232 |
| Building Material, Garden Equipment and Supply Stores (444) | \$269.9M | \$238.5M | \$-31.4M | -6.2 | 111 | Florists (4531) | \$2.7M | \$6.4M | \$3.7M | 40.3 | 16 |
| Building Material and Supplies Dealers (4441) | \$264.9M | \$222.6M | \$-42.3M | -8.7 | 95 | Office Supply, Stationery and Gift Stores (4532) | \$42.8M | \$32.2M | \$-10.6M | -14.2 | 47 |
| Lawn, Garden Equipment and Supply Stores (4442) | \$5.0M | \$15.9M | \$10.9M | 52.3 | 16 | Used Merchandise Stores (4533) | \$16.1M | \$14.7M | \$-1.5M | -4.8 | 42 |
| Food and Beverage Stores (445) | \$701.8M | \$615.8M | \$-86.1M | -6.5 | 202 | Other Misc Store Retailers (4539) | \$93.7M | \$90.1M | \$-3.6M | -2.0 | 128 |
| Grocery Stores (4451) | \$647.0M | \$527.5M | \$-119.5M | -10.2 | 101 | Nonstore Retailers (454) | \$15.9M | \$109.6M | \$93.7M | 74.7 | 34 |
| Specialty Food Stores (4452) | \$16.1M | \$43.7M | \$27.5M | 46.1 | 45 | E-Shopping and Mail-Order Houses (4541) | \$8.7M | \$94.9M | \$86.2M | 83.3 | 15 |
| Beer, Wine and Liquor Stores (4453) | \$38.7M | \$44.6M | \$5.9M | 7.1 | 56 | Vending Machine Operators (4542) | \$0.0 | \$1.7M | \$1.7M | 100.0 | 0 |
| Health and Personal Care Stores (446) | \$228.6M | \$265.7M | \$37.1M | 7.5 | 123 | Direct Selling Establishments (4543) | \$7.2M | \$13.0M | \$5.8M | 28.6 | 19 |
| Health and Personal Care Stores (4461) | \$228.6M | \$265.7M | \$37.1M | 7.5 | 123 | Food Services and Drinking Places (722) | \$442.0M | \$405.2M | \$-36.8M | -4.3 | 636 |
| Gasoline Stations (447) | \$771.3M | \$349.0M | \$-422.4M | -37.7 | 121 | Special Food Services (7223) | \$708.3K | \$8.3M | \$7.6M | 84.3 | 8 |
| Gasoline Stations (4471) | \$771.3M | \$349.0M | \$-422.4M | -37.7 | 121 | Drinking Places-Alcohol (7224) | \$2.9M | \$8.4M | \$5.5M | 48.8 | 19 |

GAP REPORT

EAST/WEST SAN BERNARDINO COUNTY



TOTAL GAP

**-\$6.8
BILLION
PER YEAR**



**MOTOR
VEHICLE**

**-\$1.5
BILLION
PER YEAR**



FURNITURE

**-\$478.9
MILLION
PER YEAR**



**FOOD &
BEVERAGE**

**-\$719.0
MILLION
PER YEAR**



**BUILDING &
GARDEN SUPPLY**

**-\$814.9
MILLION
PER YEAR**



CLOTHING

**-\$96.6
MILLION
PER YEAR**

GAP ANALYSIS

GAP REPORT
EAST/WEST SAN BERNARDINO COUNTY

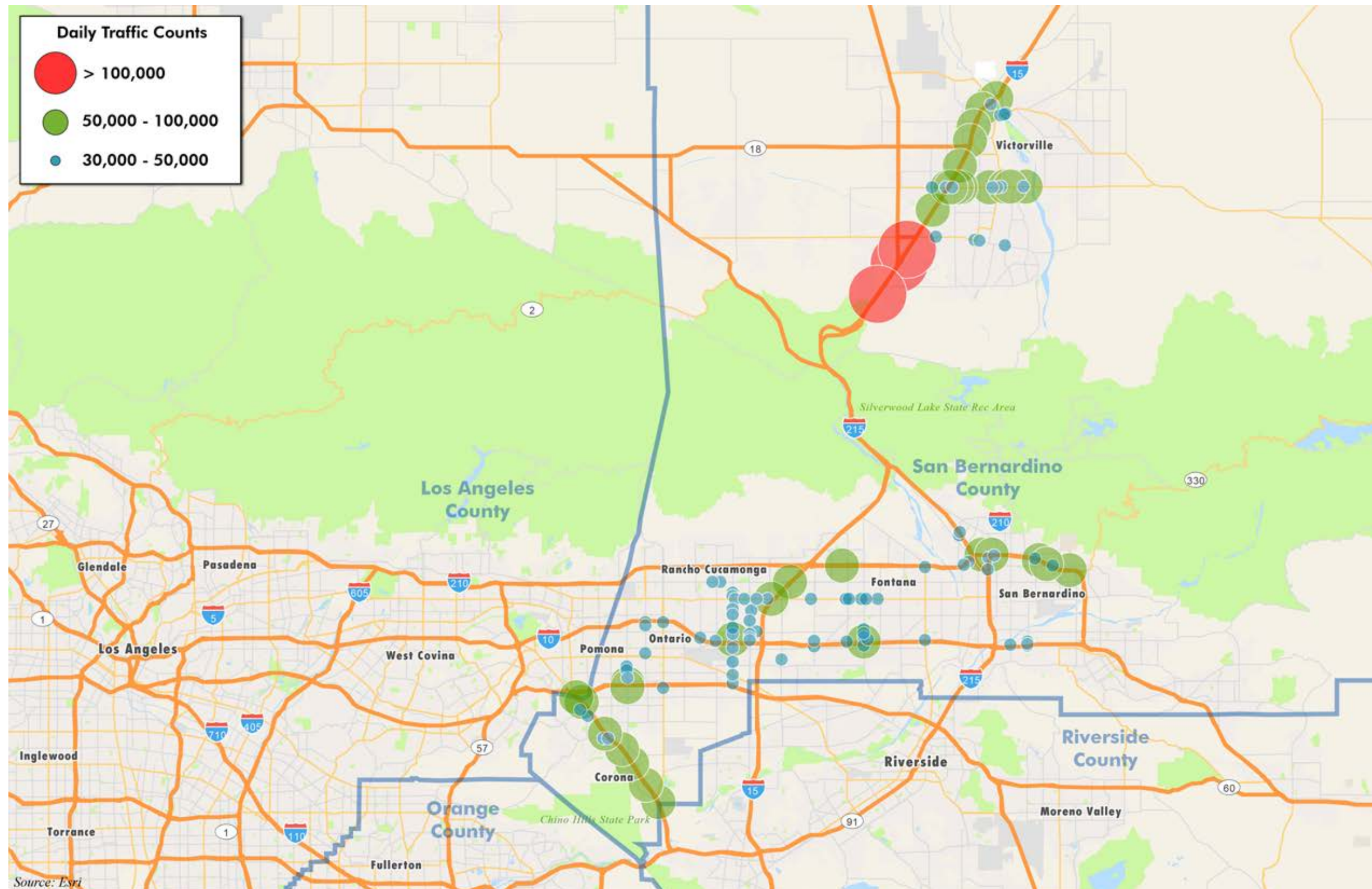


| | SALES | POTENTIAL | GAP | FACTOR | BUSINESSES | | SALES | POTENTIAL | GAP | FACTOR | BUSINESSES |
|---|----------|-----------|-----------|--------|------------|--|----------|-----------|-----------|--------|------------|
| Total Retail Sales (including Food and Drink Sales) | \$19.2B | \$12.4B | \$-6.8B | -21.4 | 8,413 | Clothing and Accessories Stores (448) | \$1.0B | \$815.4M | \$-199.1M | -10.9 | 816 |
| Retail Trade Sales (44-45) | \$17.4B | \$11.2B | \$-6.2B | -21.7 | 5,861 | Clothing Stores (4481) | \$679.3M | \$582.7M | \$-96.6M | -7.7 | 510 |
| Motor Vehicle and Parts Dealers (441) | \$3.8B | \$2.3B | \$-1.5B | -24.7 | 893 | Shoe Stores (4482) | \$230.2M | \$102.5M | \$-127.7M | -38.4 | 150 |
| Automobile Dealers (4411) | \$2.9B | \$1.8B | \$-1.1B | -22.5 | 301 | Jewelry, Luggage and Leather Goods Stores (4483) | \$105.0M | \$130.2M | \$25.2M | 10.7 | 156 |
| Other Motor Vehicle Dealers (4412) | \$429.2M | \$279.2M | \$-150.1M | -21.2 | 102 | Sporting Goods, Hobby, Book and Music Stores (451) | \$504.6M | \$361.1M | \$-143.5M | -16.6 | 300 |
| Auto Parts, Accessory and Tire Stores (4413) | \$500.3M | \$201.0M | \$-299.2M | -42.7 | 490 | Sporting Goods, Hobby and Music Instrument Stores (4511) | \$461.2M | \$312.2M | \$-148.9M | -19.3 | 259 |
| Furniture and Home Furnishing Stores (442) | \$894.4M | \$415.5M | \$-478.9M | -36.6 | 383 | Book, Periodical and Music Stores (4512) | \$43.5M | \$48.9M | \$5.4M | 5.9 | 42 |
| Furniture Stores (4421) | \$659.2M | \$217.3M | \$-441.9M | -50.4 | 196 | General Merchandise Stores (452) | \$3.2B | \$1.9B | \$-1.3B | -26.2 | 312 |
| Home Furnishings Stores (4422) | \$235.1M | \$198.1M | \$-37.0M | -8.5 | 187 | Dept Stores excl Leased Depts (4521) | \$2.1B | \$1.1B | \$-925.9M | -29.1 | 126 |
| Electronics and Appliance Stores (443) | \$436.2M | \$415.4M | \$-20.8M | -2.4 | 273 | Other General Merchandise Stores (4529) | \$1.2B | \$755.7M | \$-415.2M | -21.6 | 186 |
| Electronics and Appliance Stores (4431) | \$436.2M | \$415.4M | \$-20.8M | -2.4 | 273 | Miscellaneous Store Retailers (453) | \$649.1M | \$409.8M | \$-239.3M | -22.6 | 759 |
| Building Material, Garden Equipment and Supply Stores (444) | \$1.5B | \$657.0M | \$-814.9M | -38.3 | 521 | Florists (4531) | \$11.7M | \$18.4M | \$6.8M | 22.4 | 75 |
| Building Material and Supplies Dealers (4441) | \$1.5B | \$614.4M | \$-838.2M | -40.5 | 464 | Office Supply, Stationery and Gift Stores (4532) | \$138.3M | \$95.7M | \$-42.6M | -18.2 | 181 |
| Lawn, Garden Equipment and Supply Stores (4442) | \$19.3M | \$42.5M | \$23.2M | 37.6 | 58 | Used Merchandise Stores (4533) | \$54.2M | \$44.1M | \$-10.1M | -10.3 | 91 |
| Food and Beverage Stores (445) | \$2.5B | \$1.8B | \$-719.0M | -16.5 | 779 | Other Misc Store Retailers (4539) | \$444.8M | \$251.5M | \$-193.4M | -27.8 | 411 |
| Grocery Stores (4451) | \$2.3B | \$1.6B | \$-790.1M | -20.2 | 462 | Nonstore Retailers (454) | \$79.5M | \$325.3M | \$245.8M | 60.7 | 80 |
| Specialty Food Stores (4452) | \$88.5M | \$129.5M | \$41.1M | 18.8 | 167 | E-Shopping and Mail-Order Houses (4541) | \$58.4M | \$285.4M | \$227.1M | 66.0 | 33 |
| Beer, Wine and Liquor Stores (4453) | \$103.1M | \$133.1M | \$30.1M | 12.7 | 150 | Vending Machine Operators (4542) | \$2.6M | \$5.1M | \$2.4M | 31.7 | 14 |
| Health and Personal Care Stores (446) | \$758.0M | \$758.6M | \$587.9K | 0.0 | 417 | Direct Selling Establishments (4543) | \$18.5M | \$34.8M | \$16.3M | 30.5 | 33 |
| Health and Personal Care Stores (4461) | \$758.0M | \$758.6M | \$587.9K | 0.0 | 417 | Food Services and Drinking Places (722) | \$1.8B | \$1.2B | \$-564.1M | -18.7 | 2,553 |
| Gasoline Stations (447) | \$2.0B | \$1.0B | \$-977.1M | -32.7 | 327 | Special Food Services (7223) | \$14.8M | \$24.5M | \$9.7M | 24.8 | 38 |
| Gasoline Stations (4471) | \$2.0B | \$1.0B | \$-977.1M | -32.7 | 327 | Drinking Places-Alcohol (7224) | \$22.0M | \$25.9M | \$3.9M | 8.0 | 63 |



DAILY TRAFFIC COUNTS

DAILY TRAFFIC COUNTS

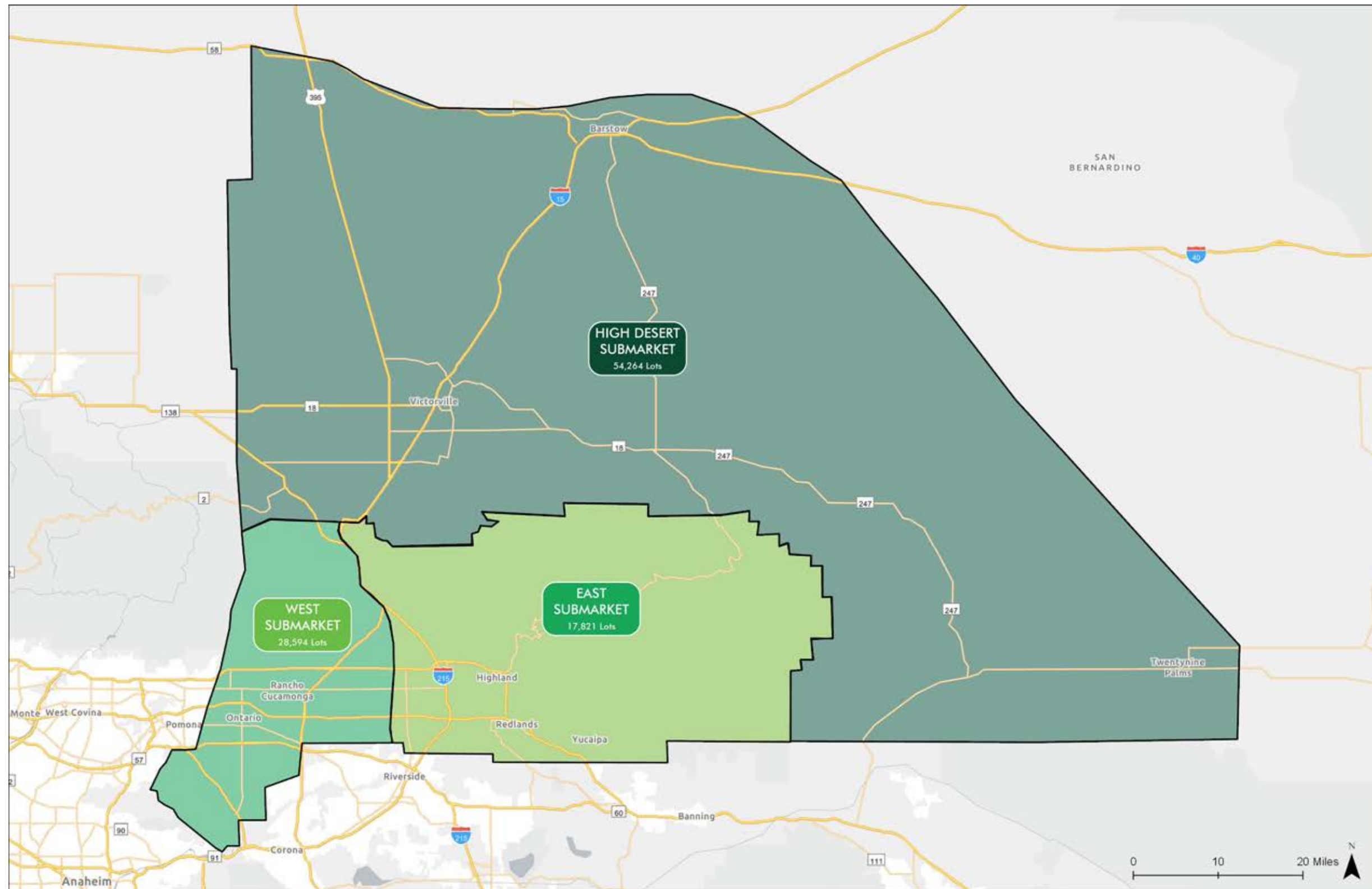




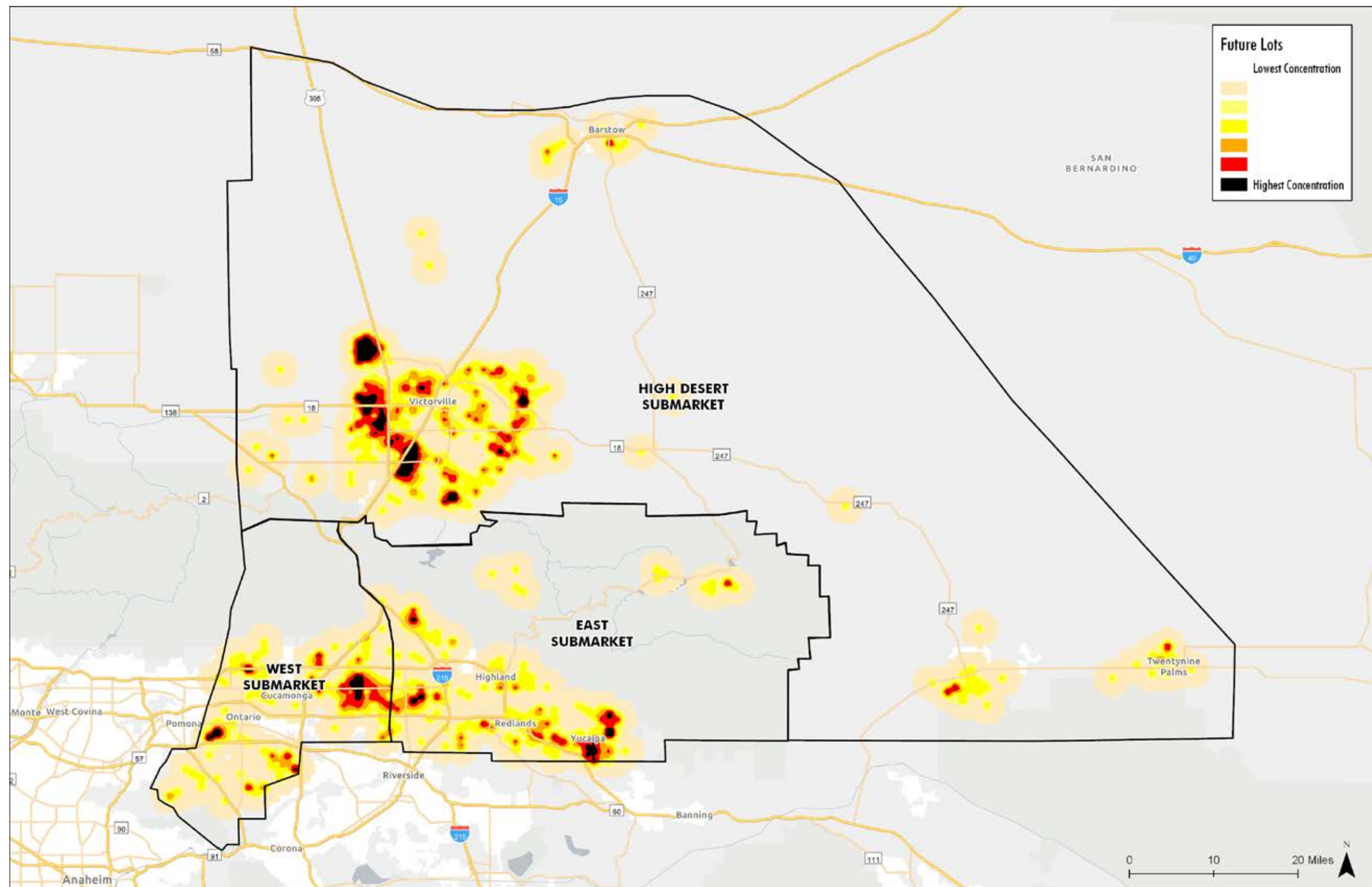
HOUSING ACTIVITY



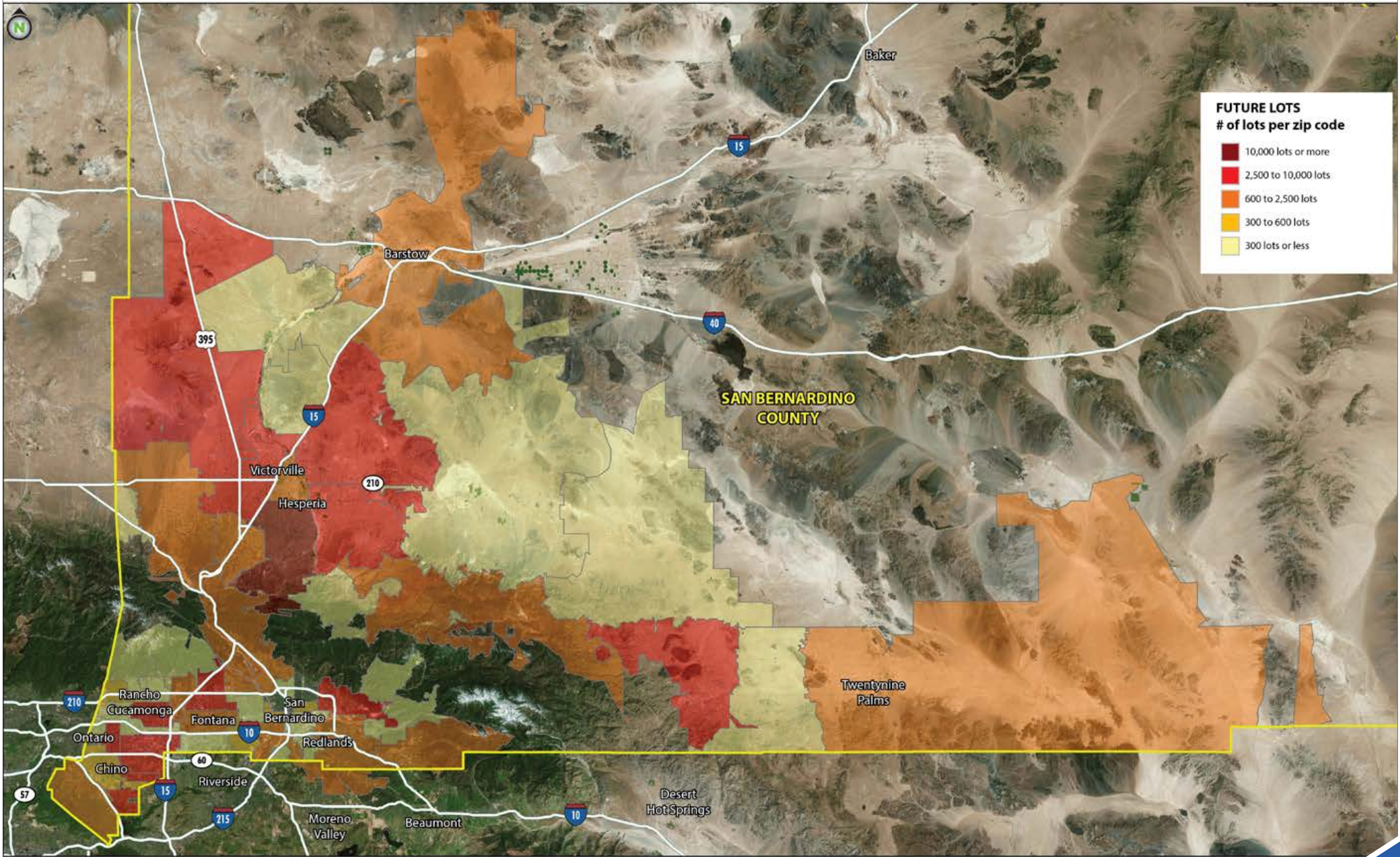
FUTURE LOTS - SUBMARKETS



FUTURE LOTS - HEATMAP



HOUSING ACTIVITY BY ZIP CODE





FOR MORE INFORMATION CONTACT:

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ELISA LAUREL

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