

# SAN BERNARDINO COUNTY

## Retail Overview



SAN BERNARDINO  
COUNTY

YEAR END 2021

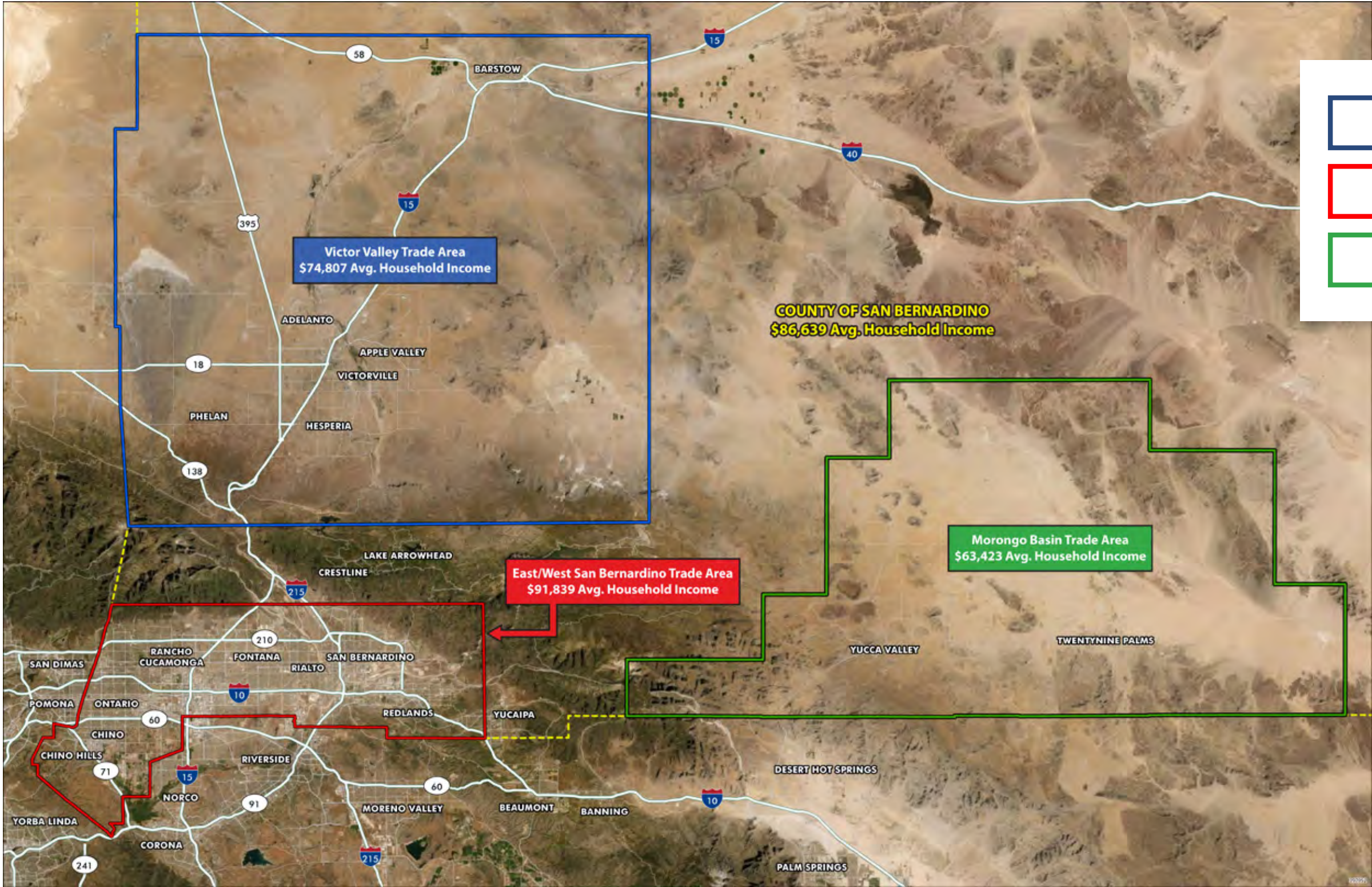


# THE TRADE AREA





# THE TRADE AREA

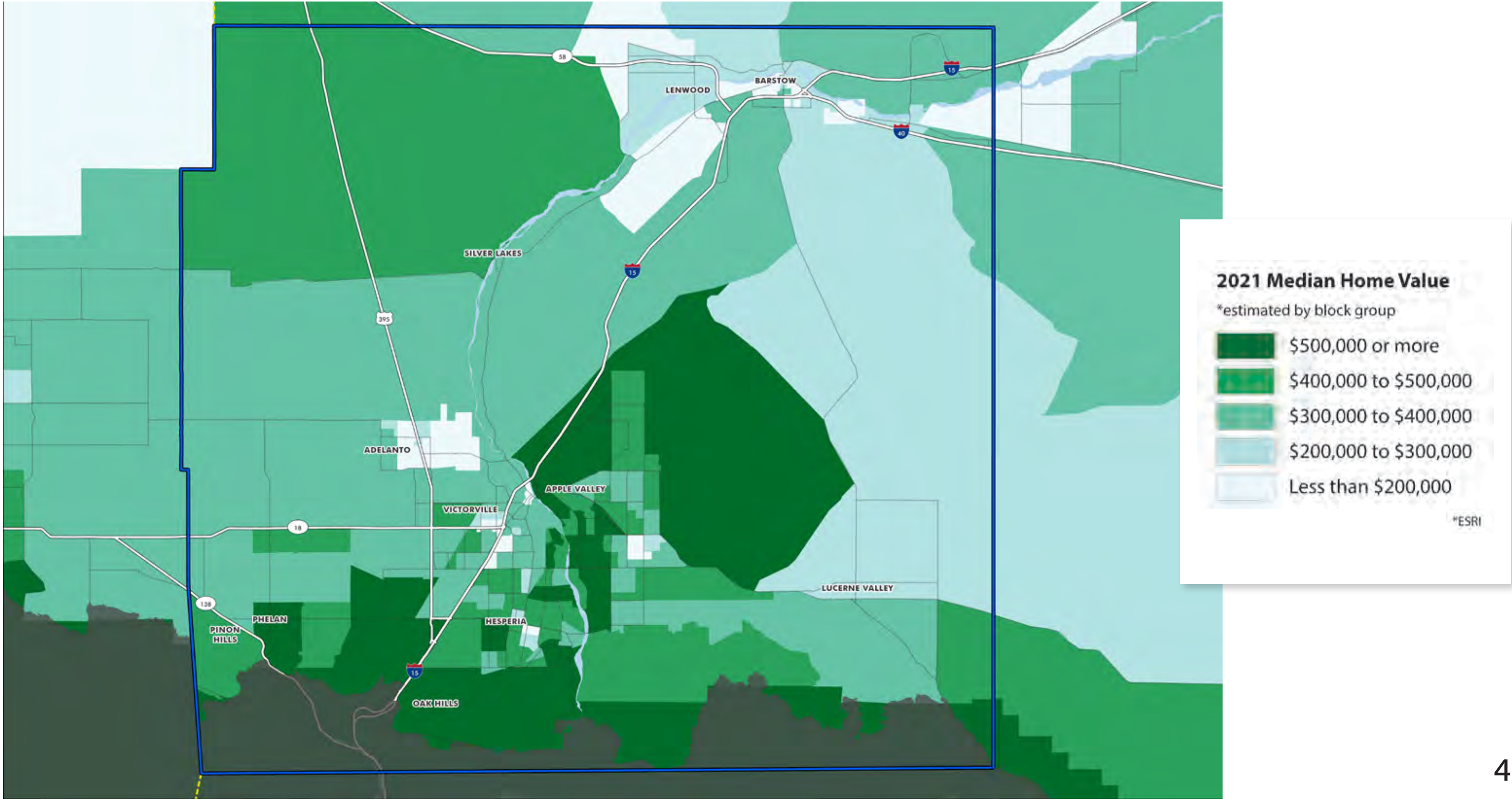


Victor Valley

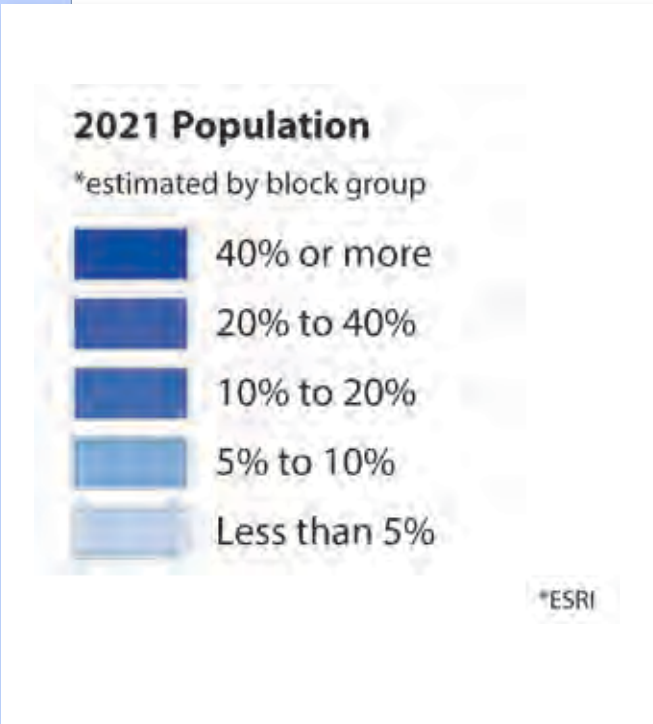
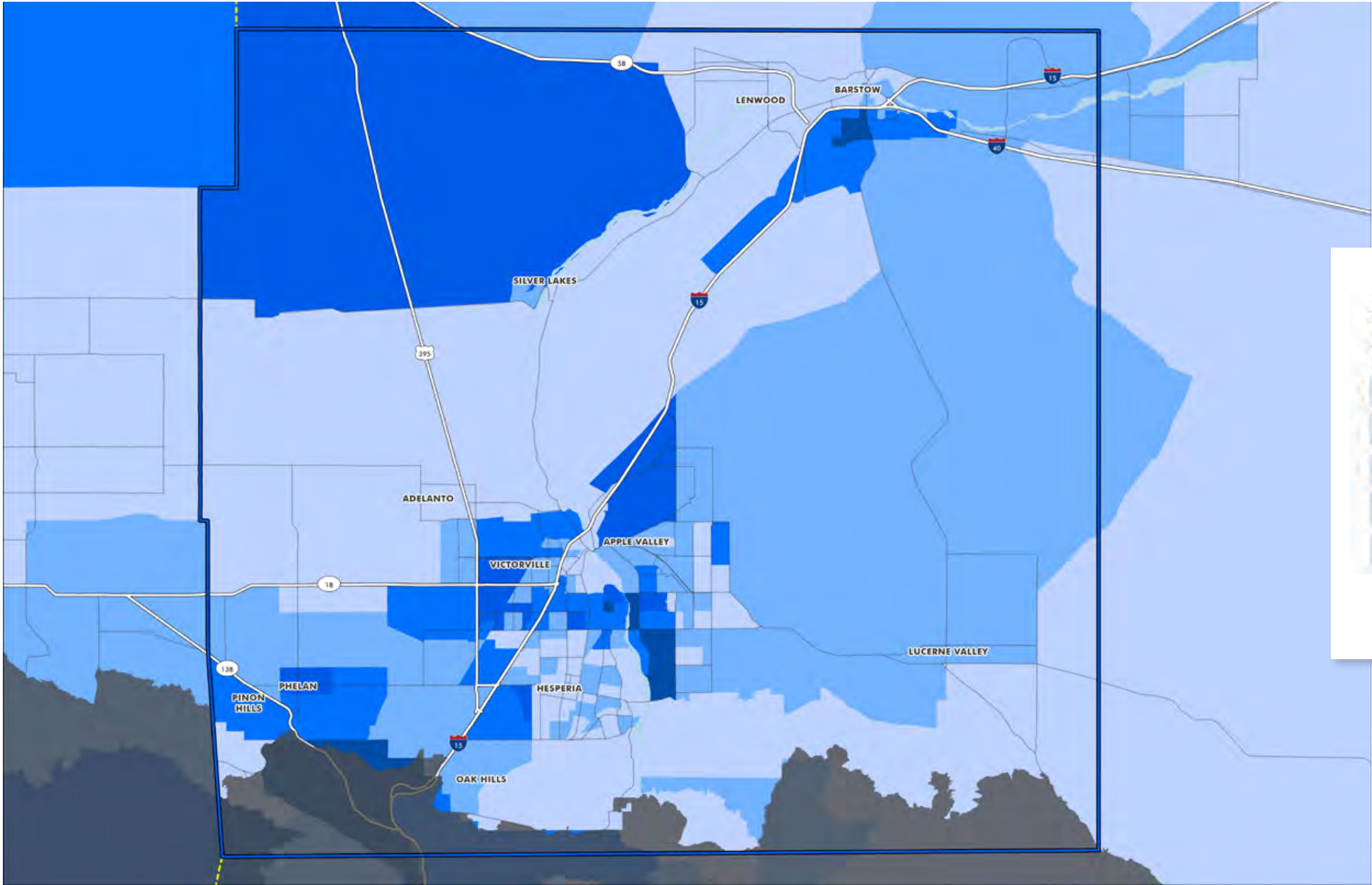
East/West San Bernardino

Morongo Basin

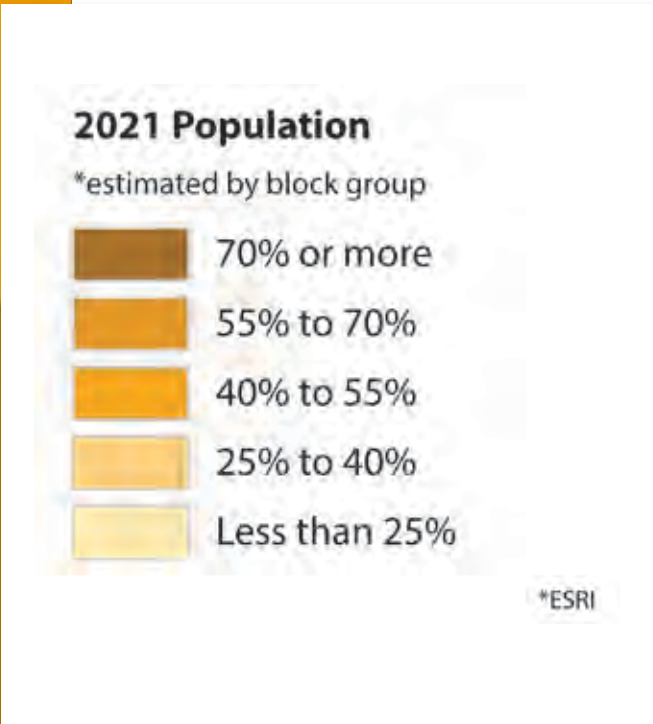
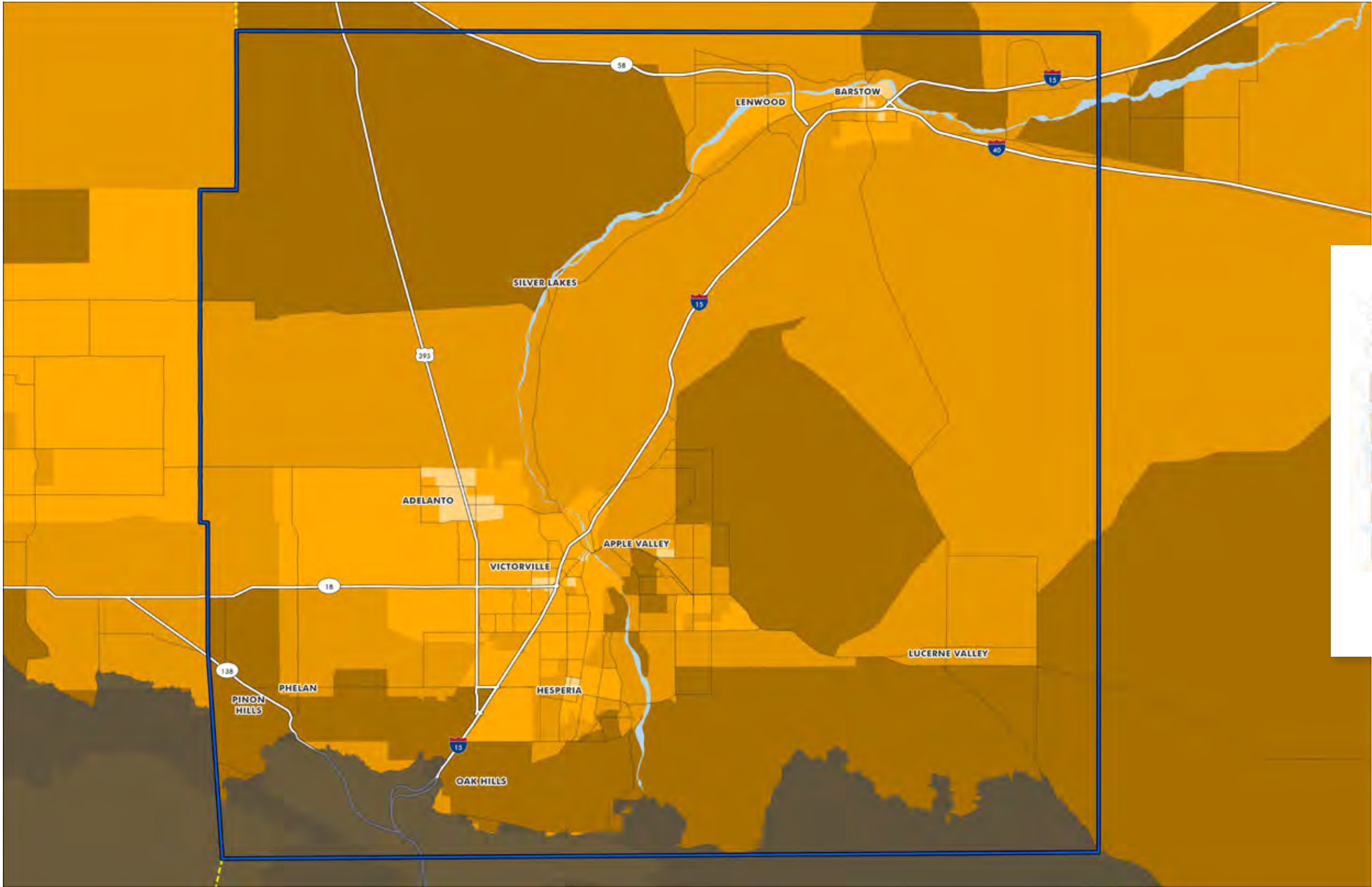




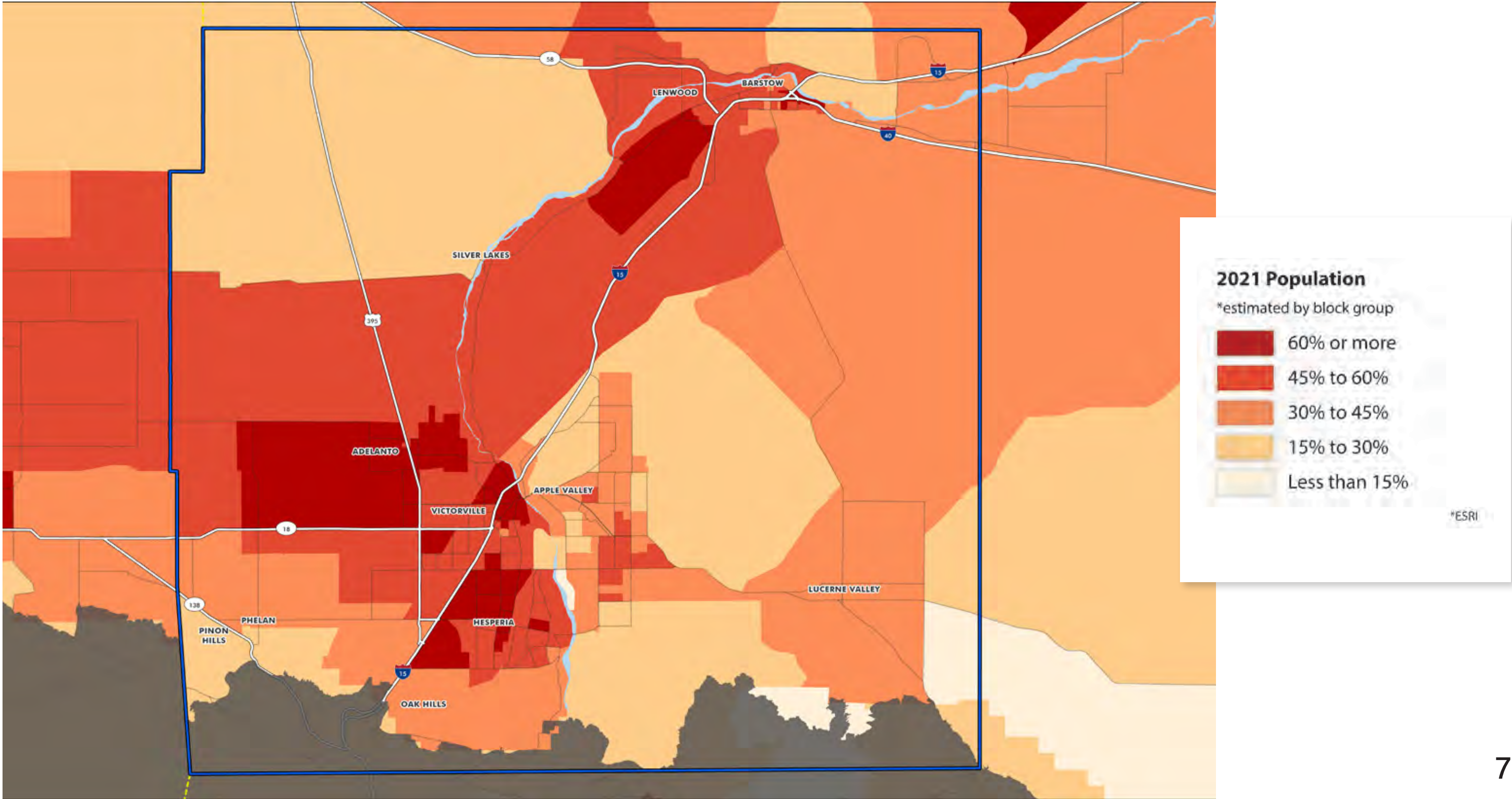




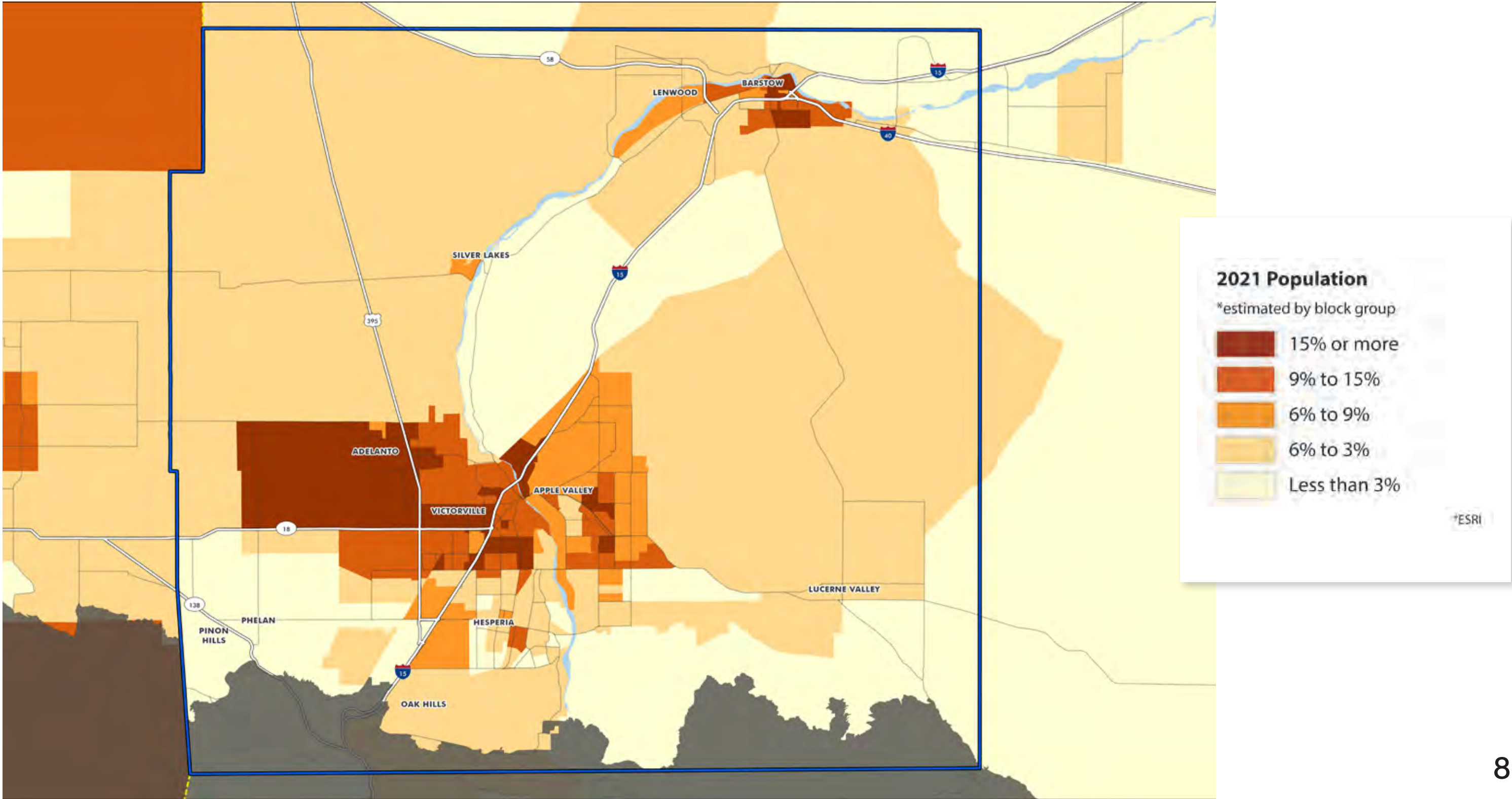








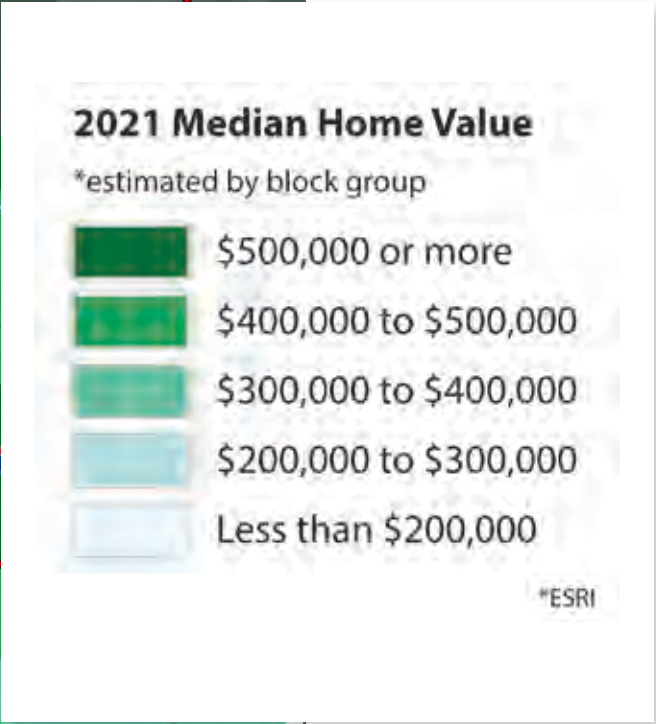
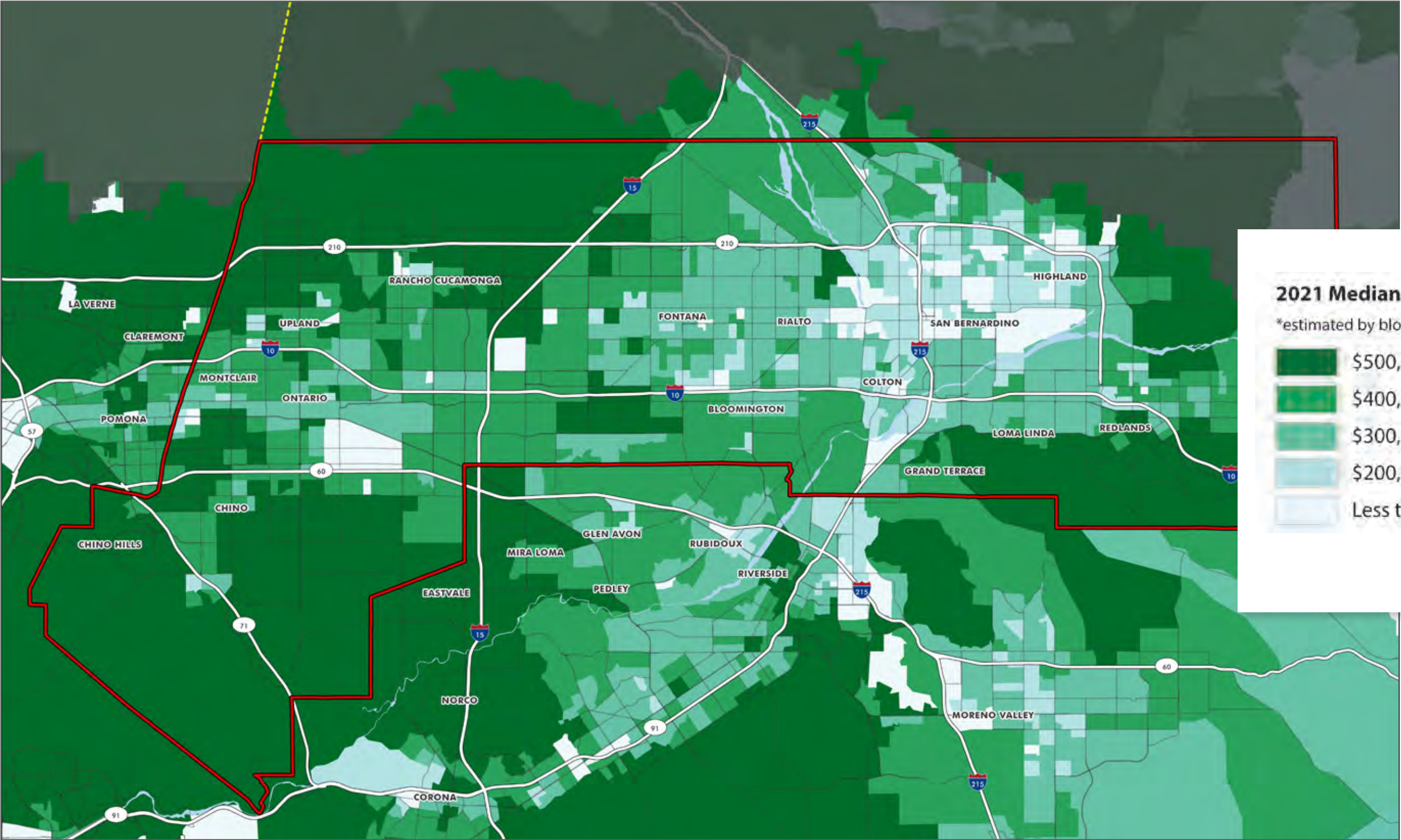




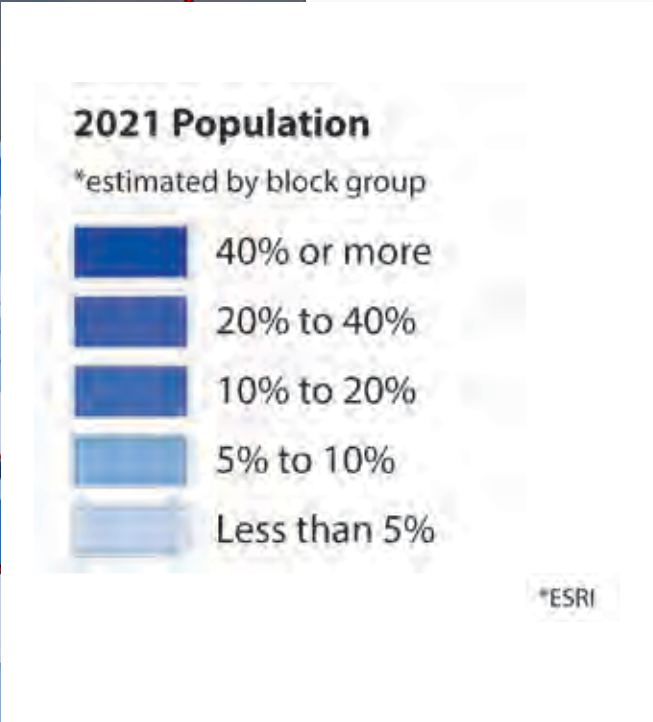
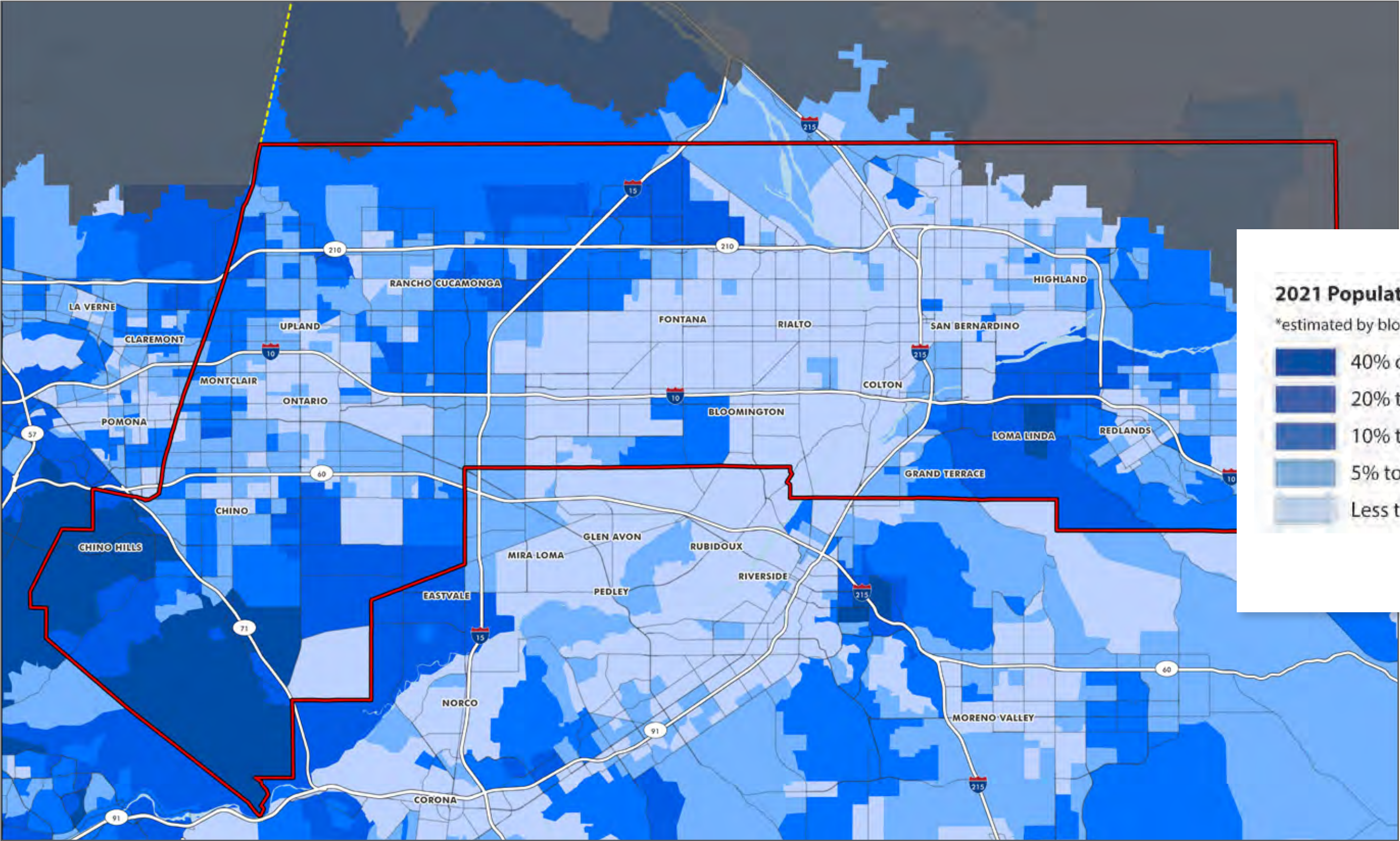


# EAST/WEST SAN BERNARDINO

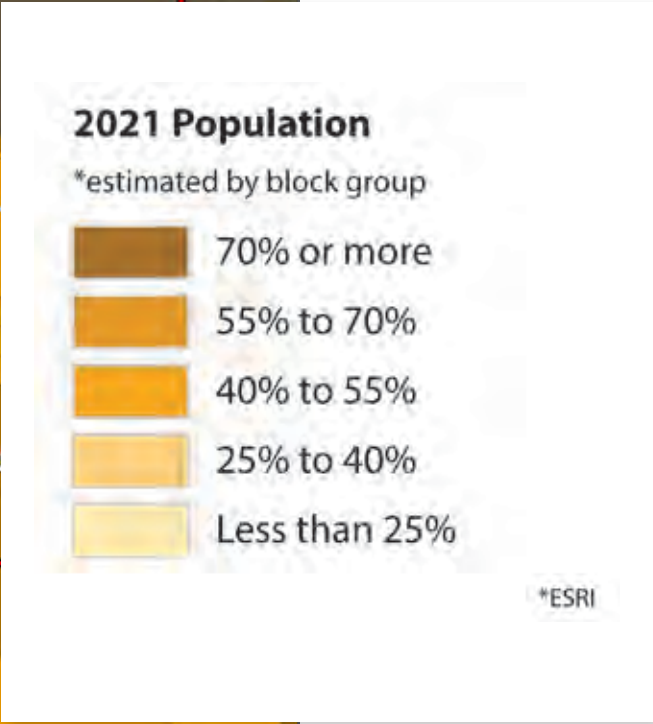
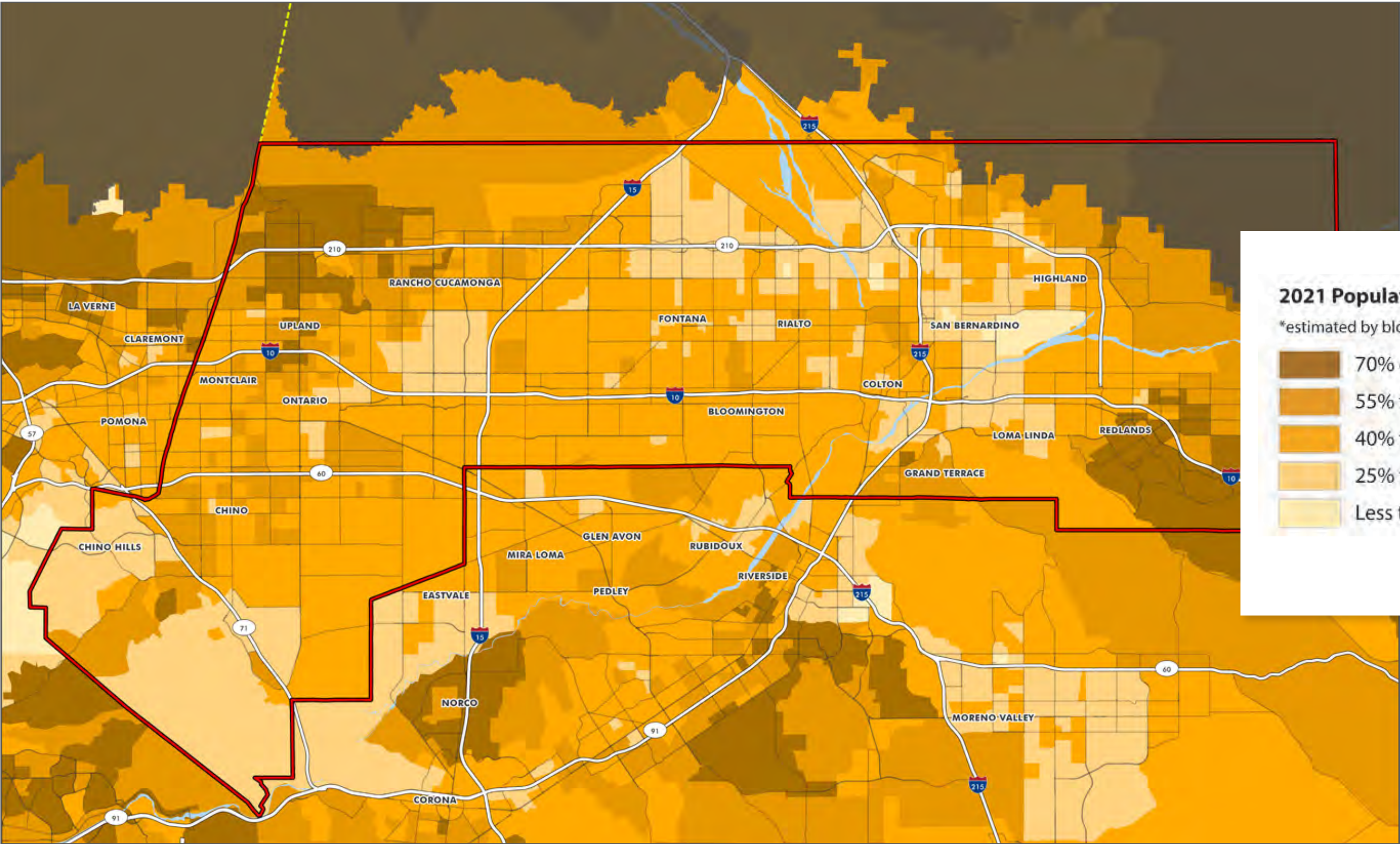
Median Home Value



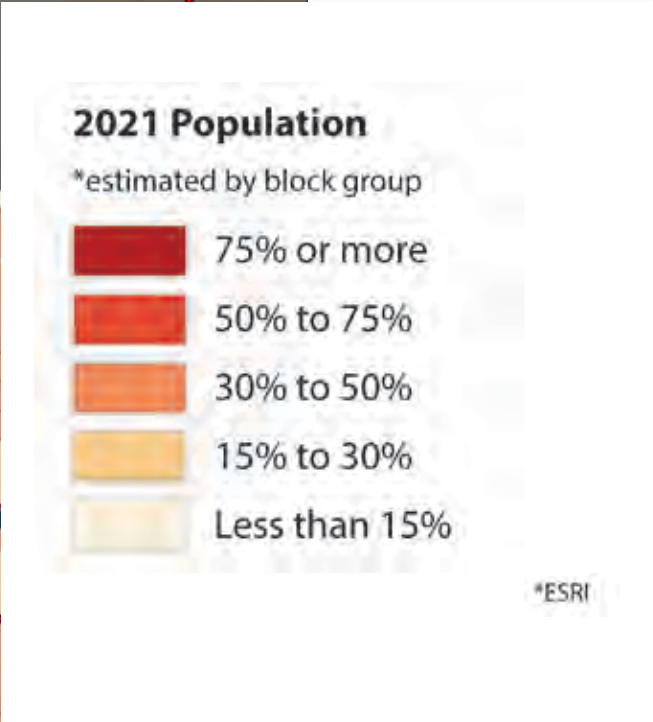
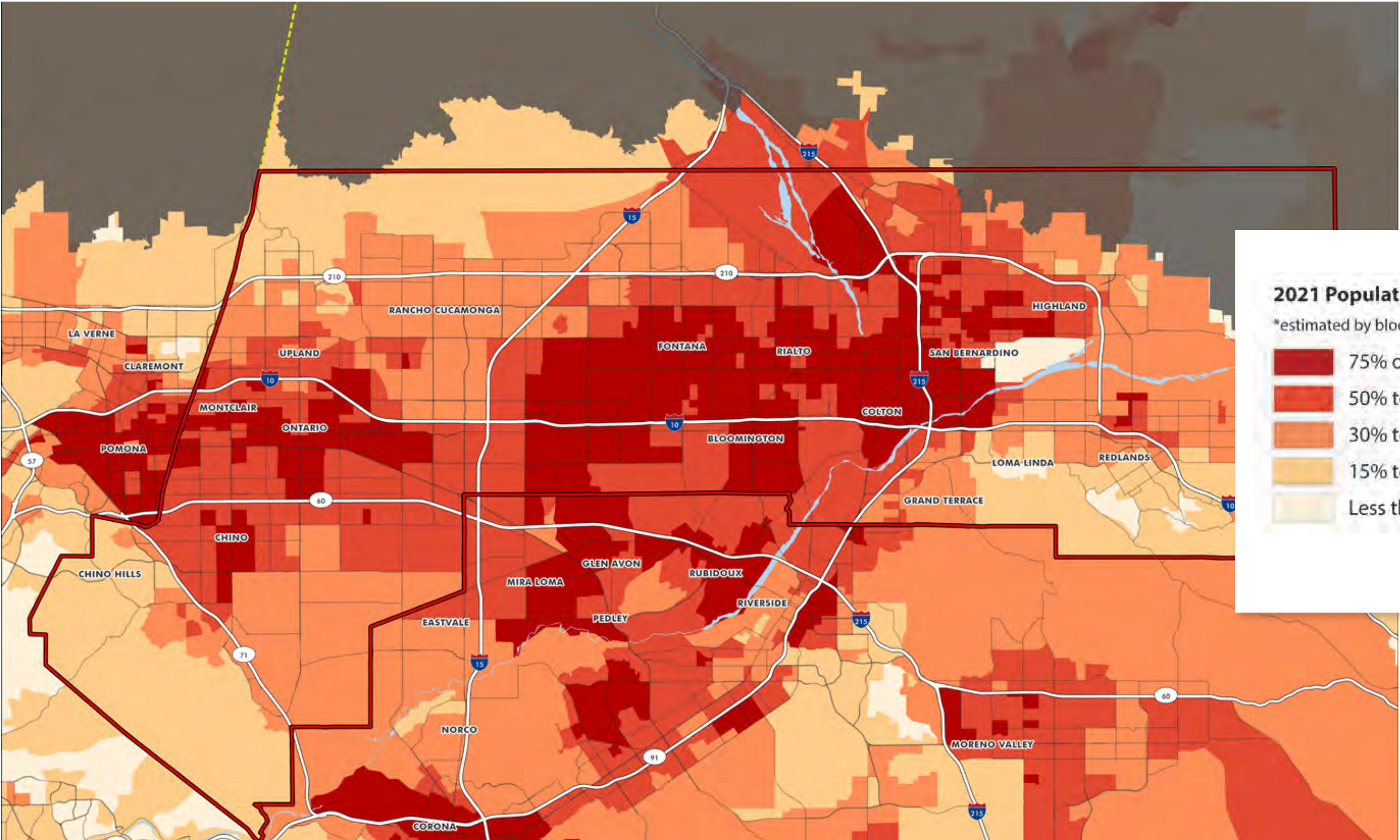








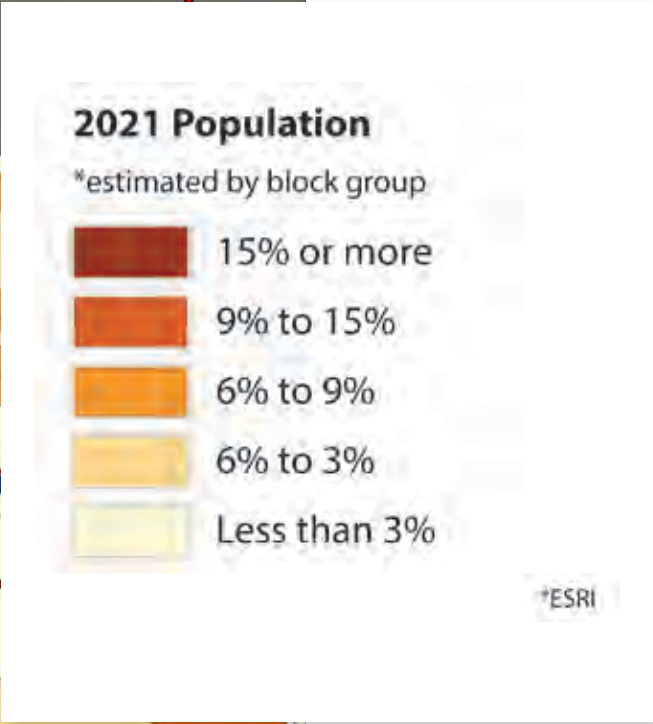
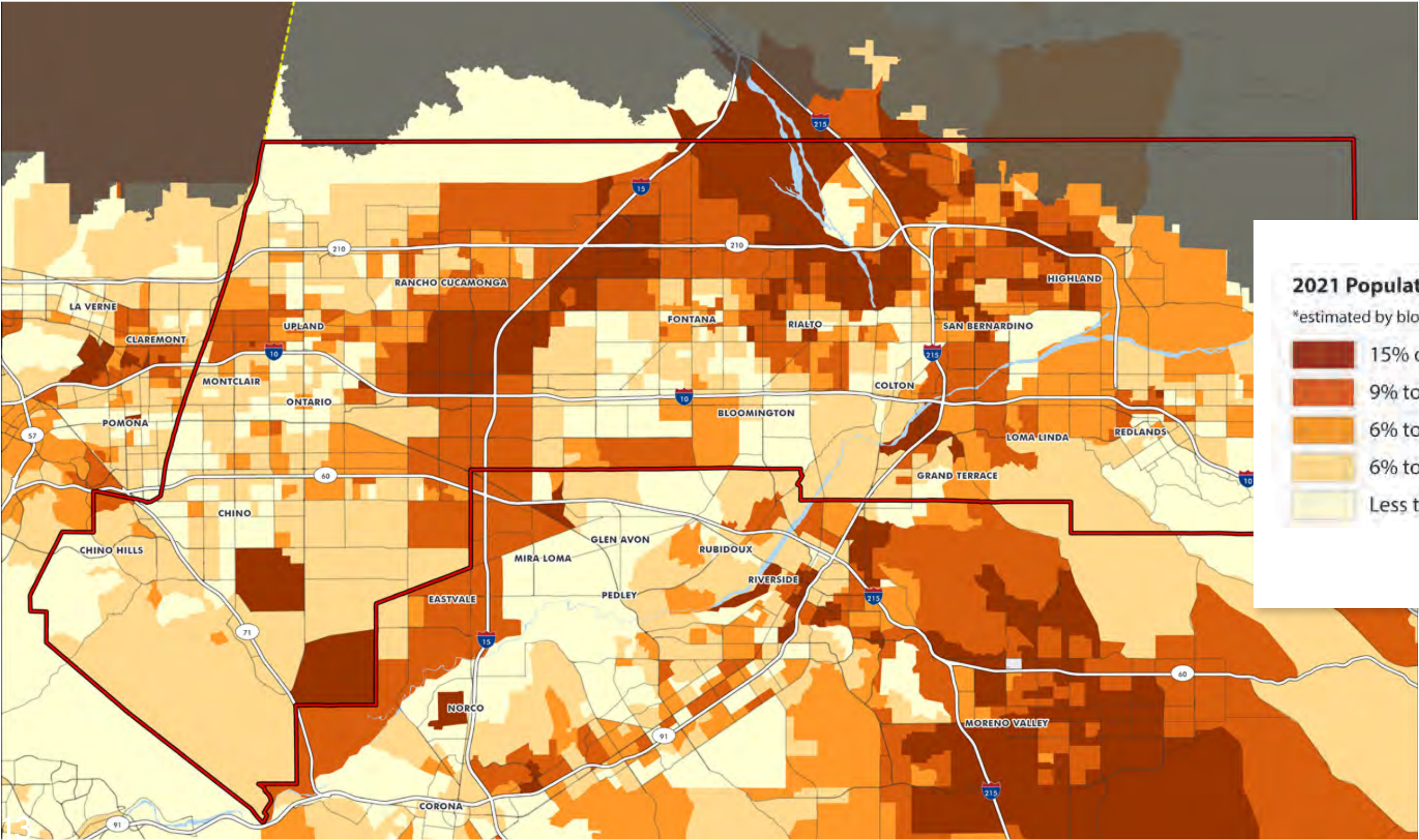




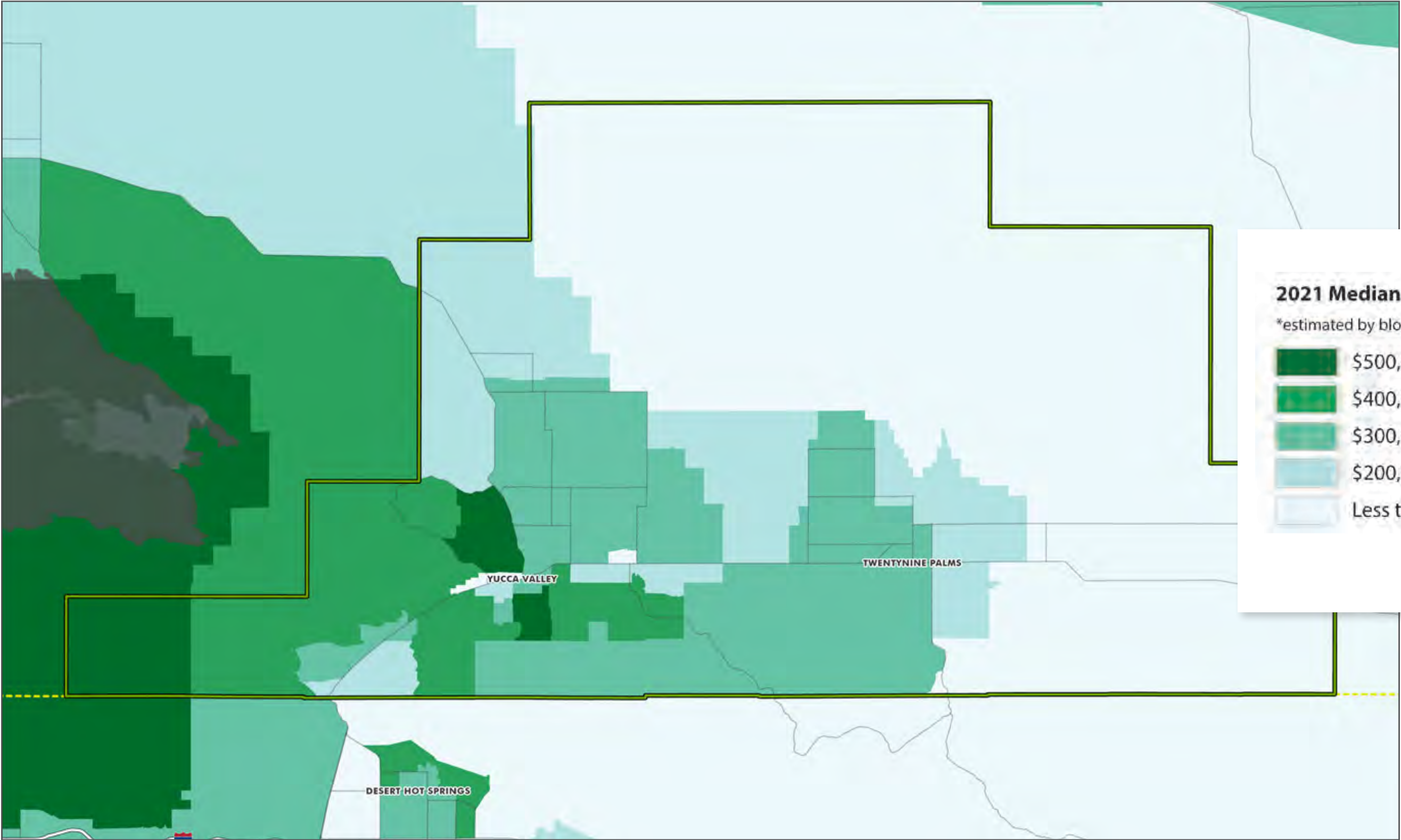


# EAST/WEST SAN BERNARDINO

African American  
Population





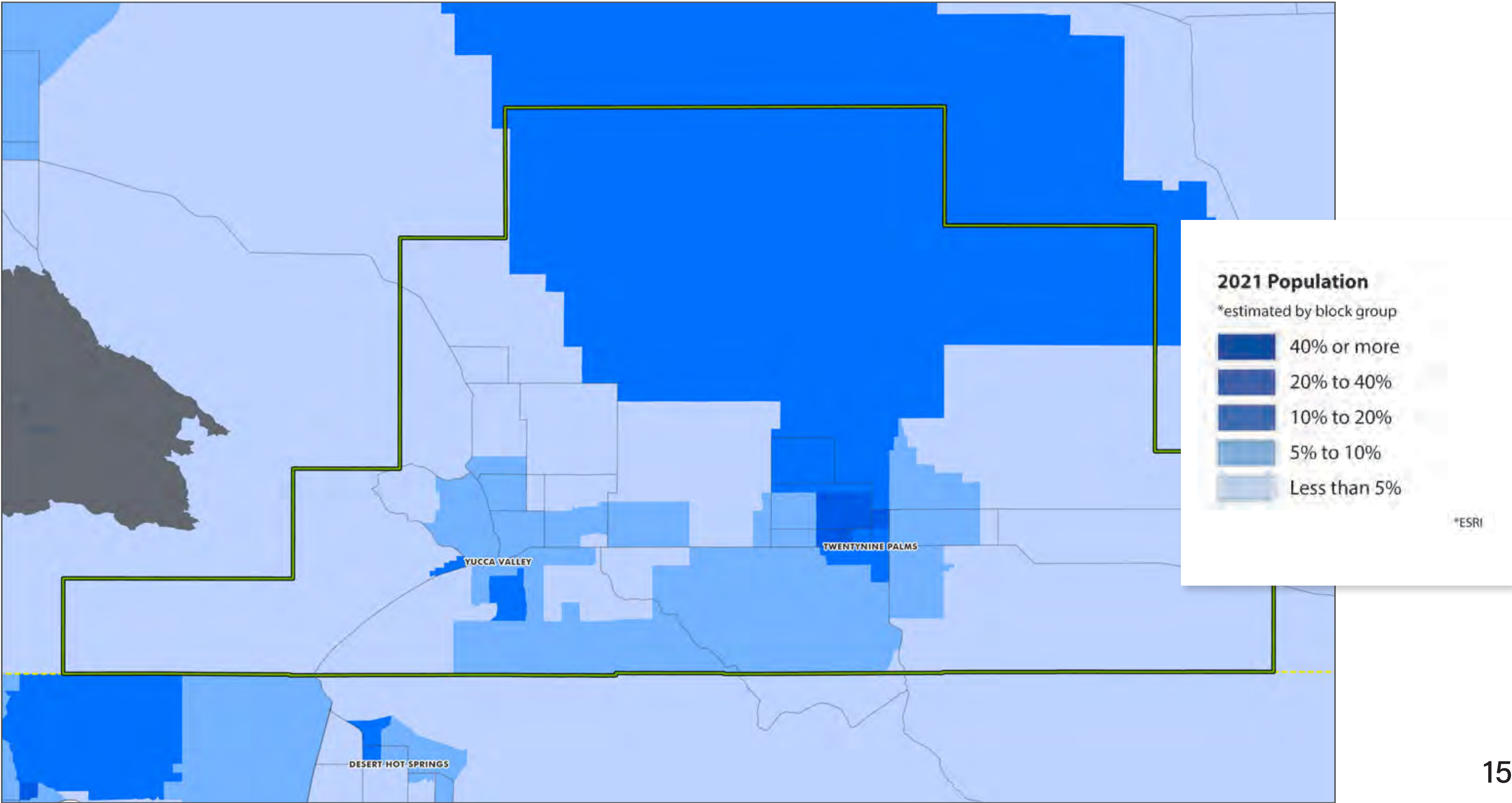


**2021 Median Home Value**  
\*estimated by block group

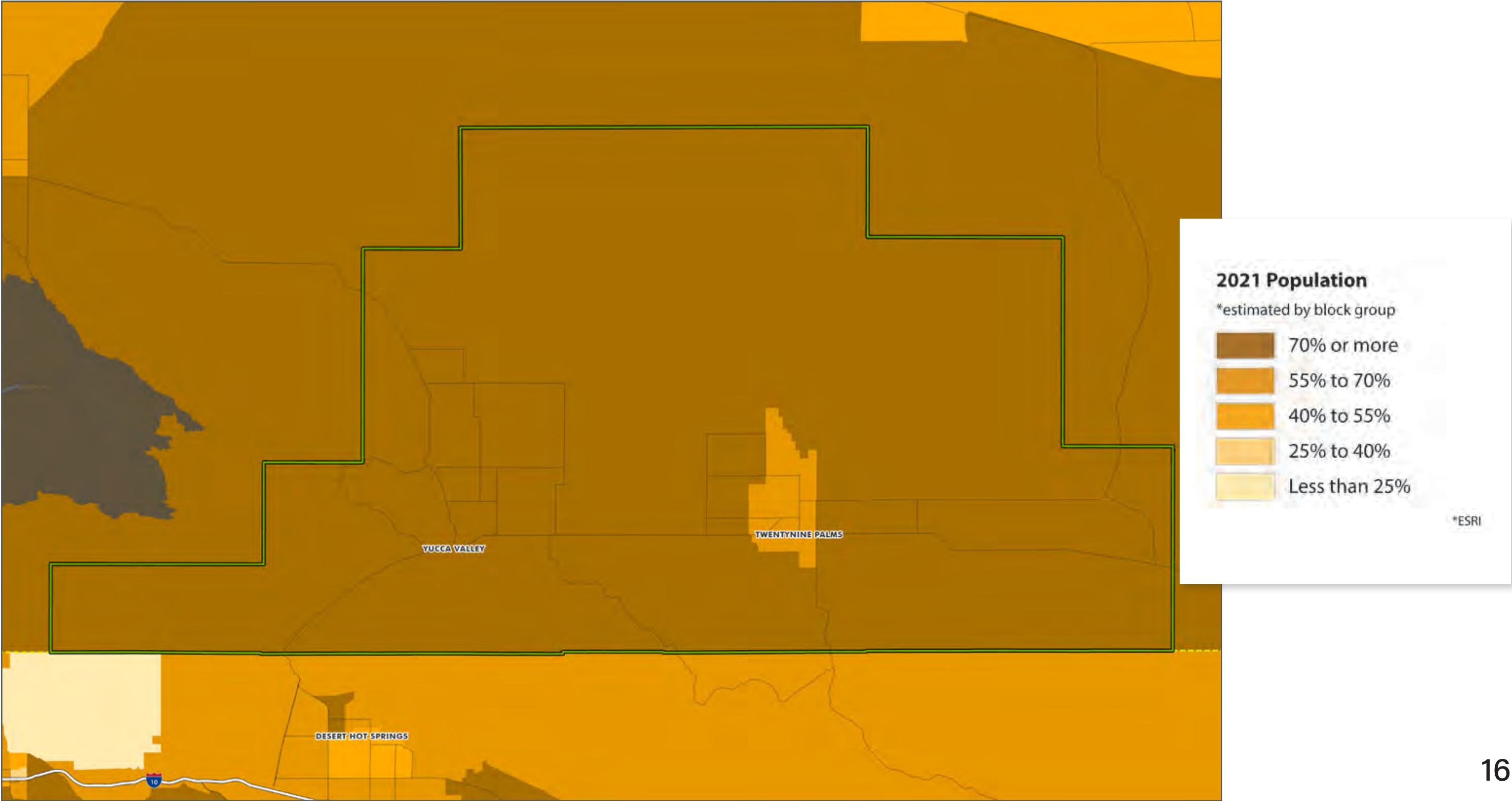
Dark Green	\$500,000 or more
Medium Green	\$400,000 to \$500,000
Light Green	\$300,000 to \$400,000
Light Blue	\$200,000 to \$300,000
Very Light Blue	Less than \$200,000

\*ESRI

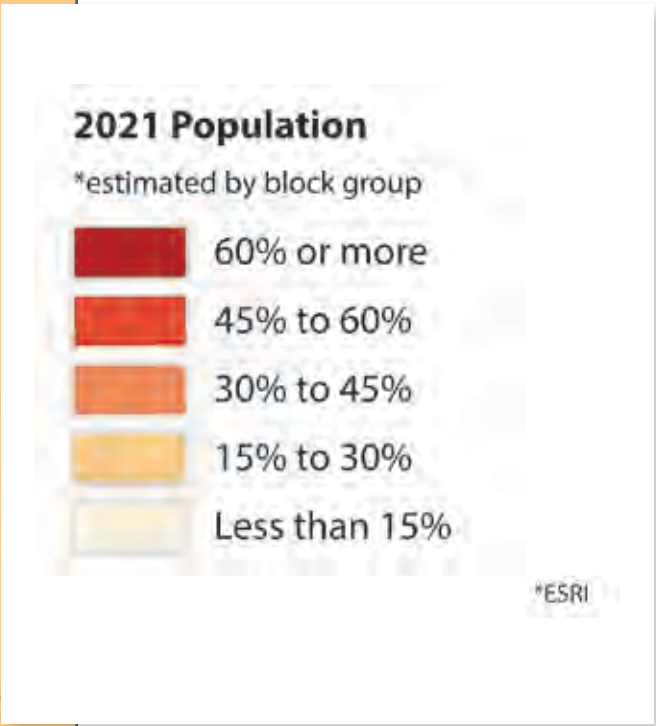
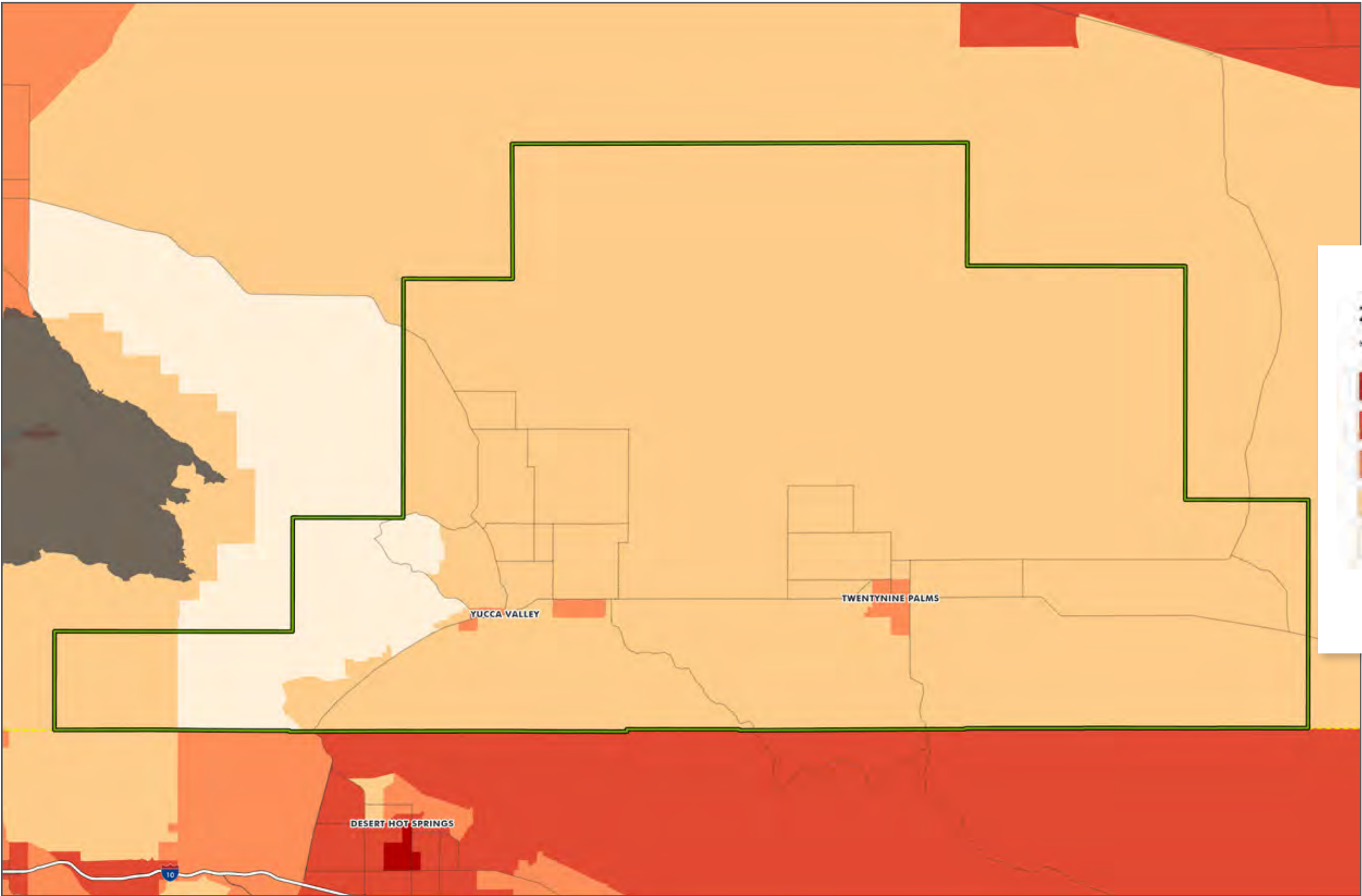




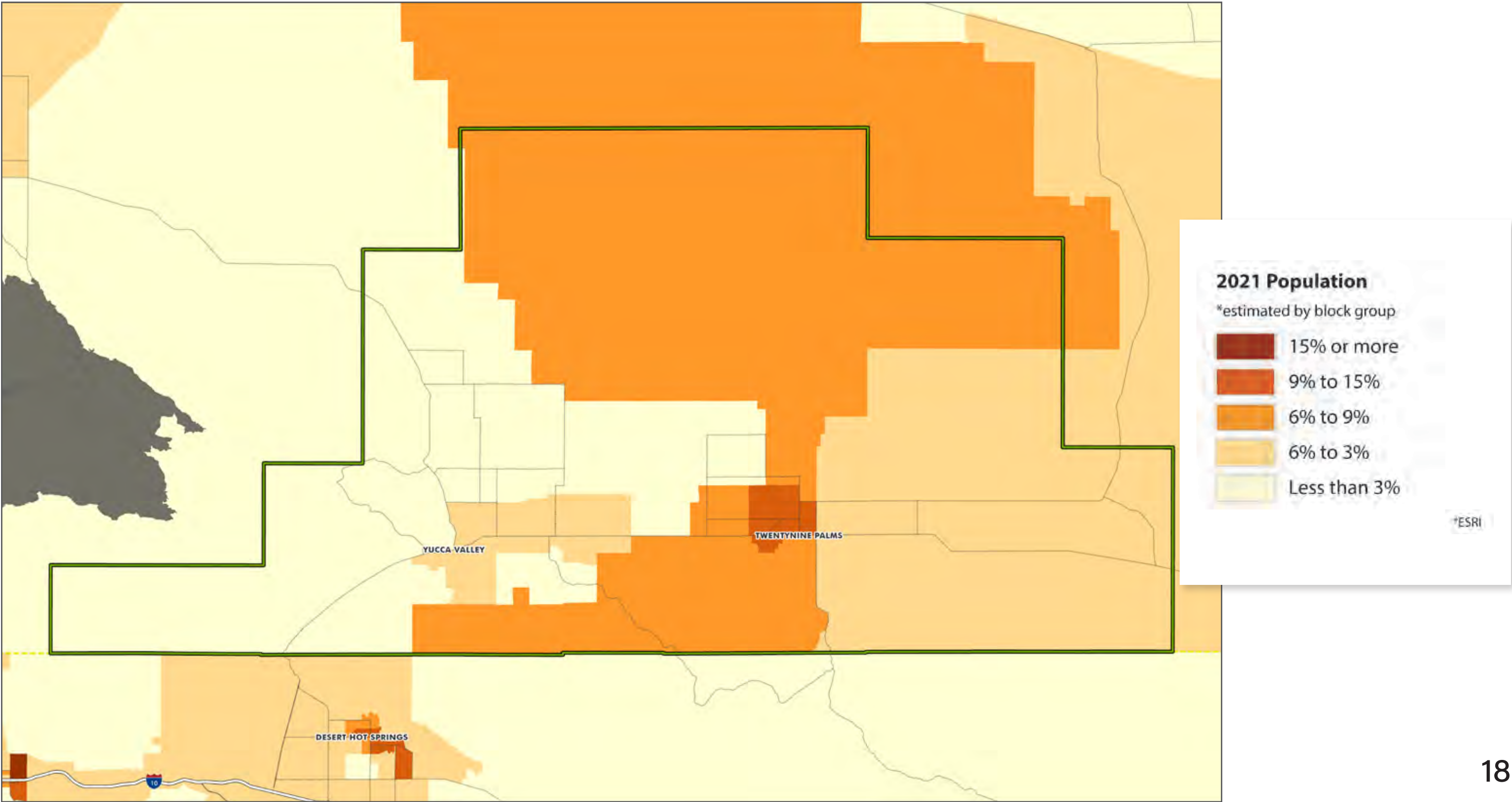














# MAJOR RETAIL





# MAJOR SHOPPING CENTERS

TOP 5 SHOPPING CENTERS

E/W San Bernardino

#	Tenant	City	RBA/GLA	Anchor Tenants
1	Victoria Gardens	Rancho Cucamonga	1,811,243 SF	JCPenney
2	Ontario Mills	Ontario	1,595,781 SF	Dorlington, Marshalls, rack
3	Montclair Place	Montclair	1,413,435 SF	JCPenney
4	Inland Center Mall	San Bernardino	1,097,294 SF	JCPenney, FOREVER 21
5	Colonies Crossroads	Upland	875,682 SF	RED BATH & BEYOND, DICK'S, KOHL'S, rack, PETSMART, TJ-MAXX

\*Costar

TOP 5 SHOPPING CENTERS

Victor Valley

#	Tenant	City	RBA/GLA	Anchor Tenants
1	The Mall of Victor Valley	Victorville	663,665	JCPenney, DICK'S
2	Dunia Plaza	Victorville	593,376	Walmart, Lowe's
3	Jess Ranch Marketplace	Apple Valley	509,582	BEST BUY, Dorlington, RED BATH & BEYOND
4	Apple Valley Commons	Apple Valley	474,145	ROSS, DOLLAR TREE
5	Village Center	Victorville	335,305	

TOP 5 SHOPPING CENTERS

Moreno Basin

#	Tenant	City	RBA/GLA	Anchor Tenants
1	Yucca Valley Square	Yucca Valley	222,484	DOLLAR TREE, STATER BROS.
2	Yucca Valley Home Depot Center	Yucca Valley	185,638	HOME DEPOT
3	Joshua Village Shopping Center	Yucca Valley	164,877	VONS
4	Stater Bros Plaza	Twentynine Palms	89,475	STATER BROS., DOLLAR TREE
5	Desert Hills Plaza	Yucca Valley	89,134	WICKS





# MAJOR SHOPPING CENTERS

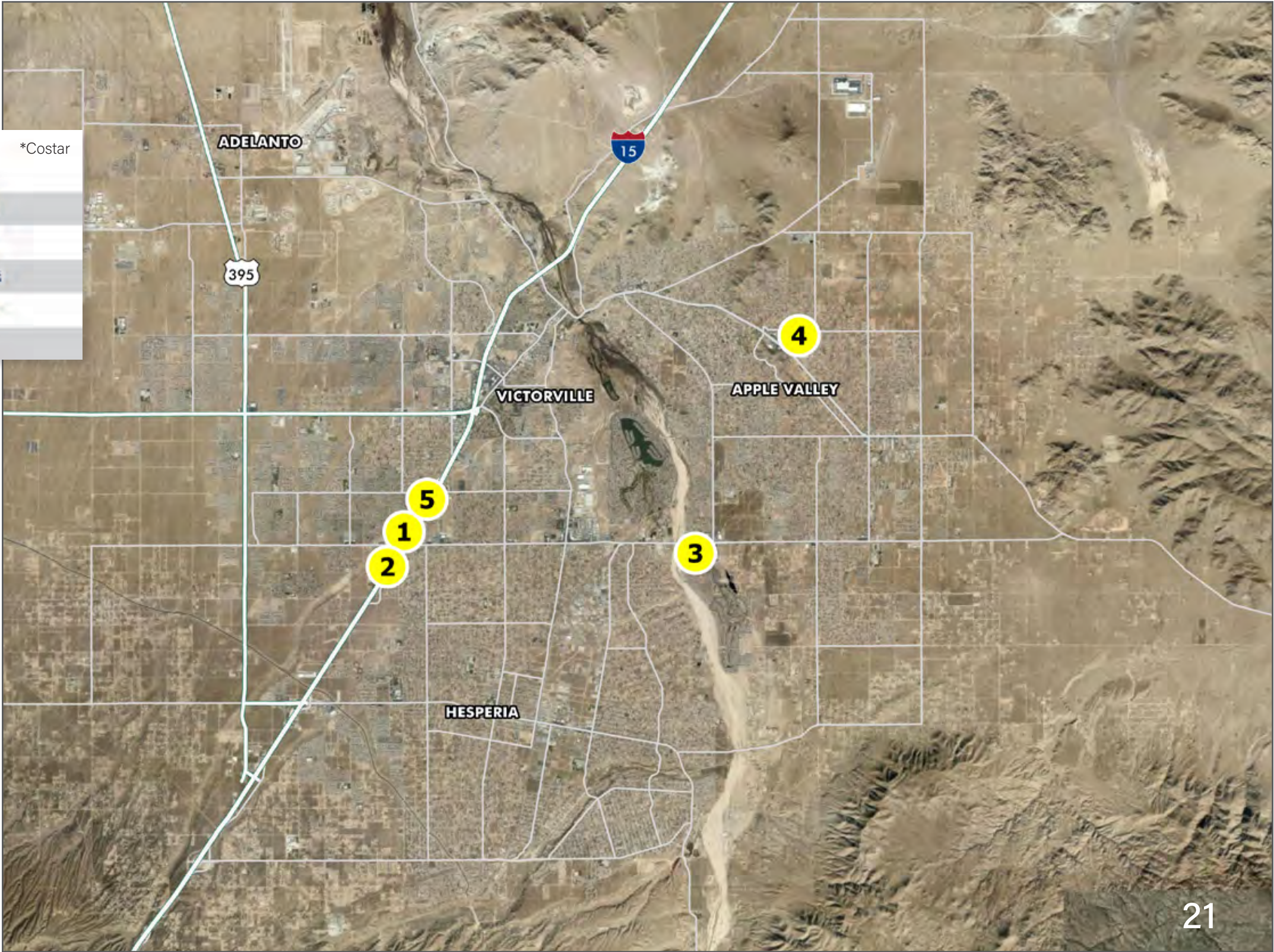
Top 5 Victor Valley

TOP 5 SHOPPING CENTERS

Victor Valley

#	Tenant	City	RSA/GLA	Anchor Tenants
1	The Mall of Victor Valley	Victorville	663,995	JCPenney, Dick's
2	Dunla Plaza	Victorville	593,376	Walmart, Lowe's
3	Jess Ranch Marketplace	Apple Valley	509,582	Best Buy, Burlington, Bed Bath & Beyond
4	Apple Valley Commons	Apple Valley	474,145	Target, Ross, Dollar Tree
5	Village Center	Victorville	335,360	99c

\*Costar

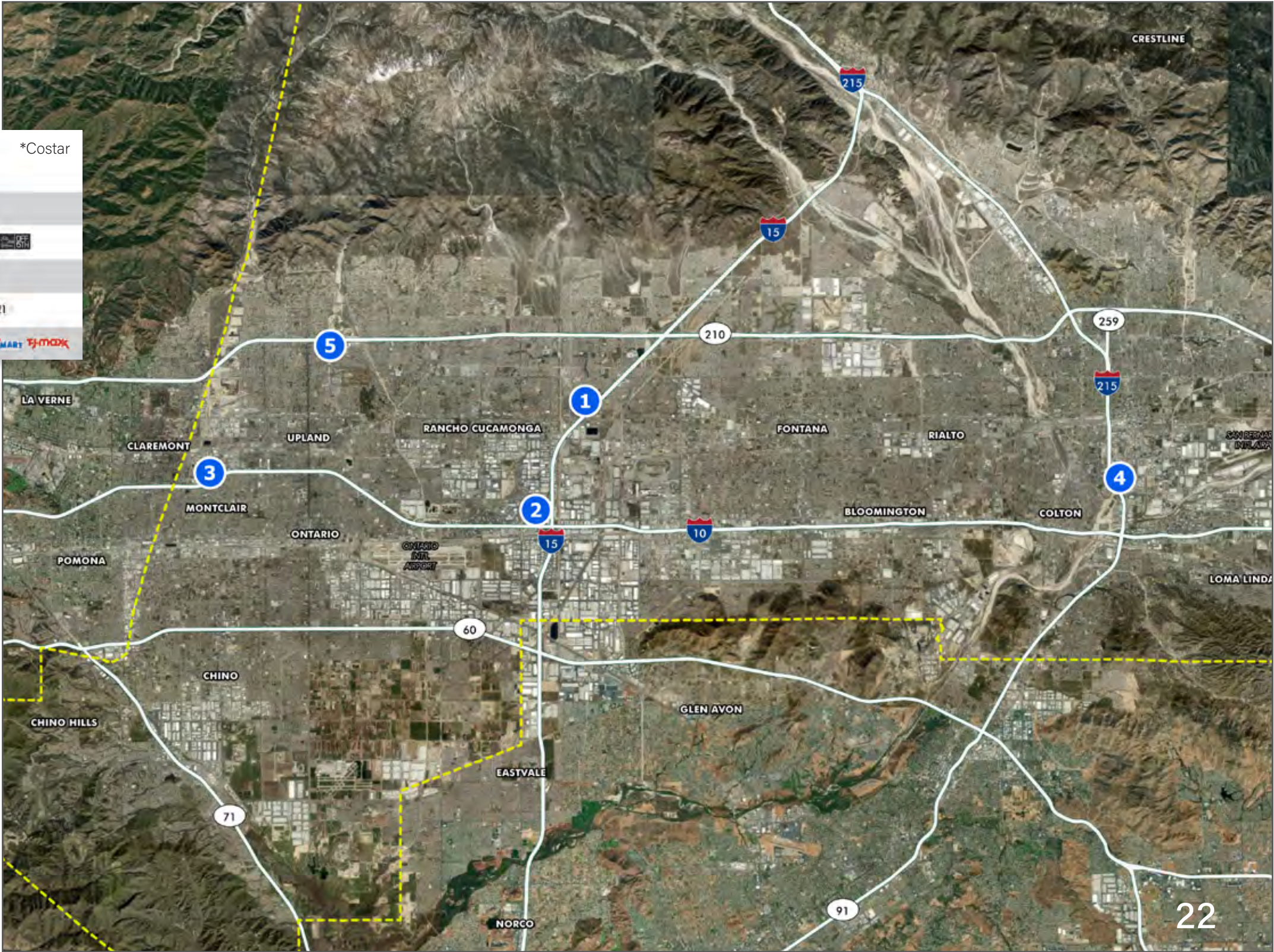




# MAJOR SHOPPING CENTERS

Top 5 East/West  
San Bernardino

TOP 5 SHOPPING CENTERS				
E/W San Bernardino				
#	Tenant	City	RBA/GLA	Anchor Tenants
1	Victoria Gardens	Rancho Cucamonga	1,811,243 SF	JCPenney
2	Ontario Mills	Ontario	1,595,781 SF	Durlington, Marshalls, rack
3	Montclair Place	Montclair	1,413,435 SF	*Costco, JCPenney
4	Inland Center Mall	San Bernardino	1,097,294 SF	*Costco, JCPenney, FOREVER 21
5	Colonies Crossroads	Upland	875,682 SF	RED BATH & BEYOND, DICK'S, KOHL'S, rack, PETSMART, TJ-MAXX





# MAJOR SHOPPING CENTERS

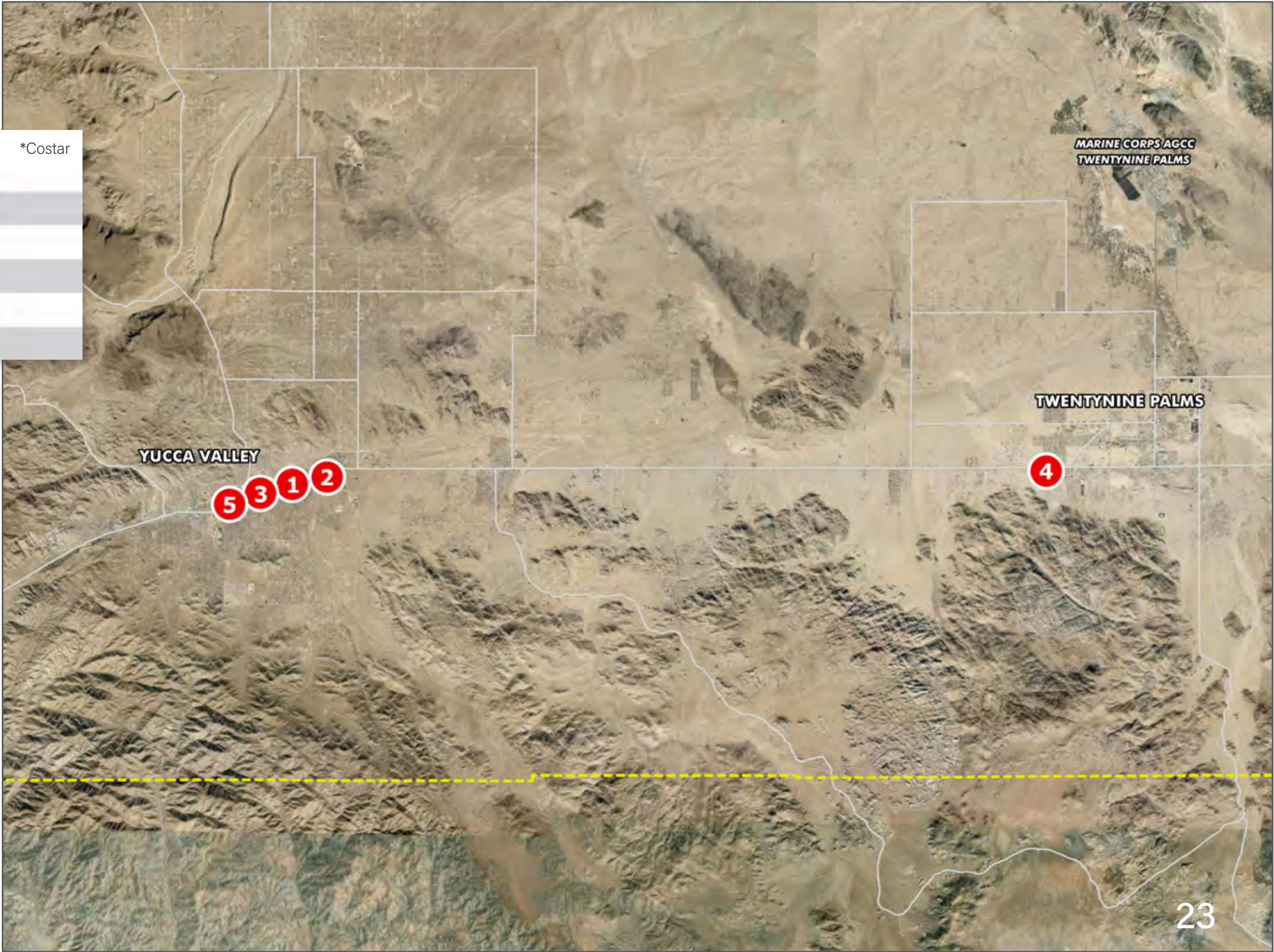
Top 5 Morongo Basin

TOP 5 SHOPPING CENTERS

Morongo Basin

\*Costar

#	Tenant	City	RBA/GLA	Anchor Tenants
1	Yucca Valley Square	Yucca Valley	222,484	DOLLAR TREE, STATER BROS
2	Yucca Valley Home Depot Center	Yucca Valley	185,638	HOME DEPOT
3	Joshua Village Shopping Center	Yucca Valley	104,475	VONS
4	Stater Bros Plaza	Twentynine Palms	89,475	STATER BROS, DOLLAR TREE
5	Desert Hills Plaza	Yucca Valley	89,134	GROCERY OUTLET



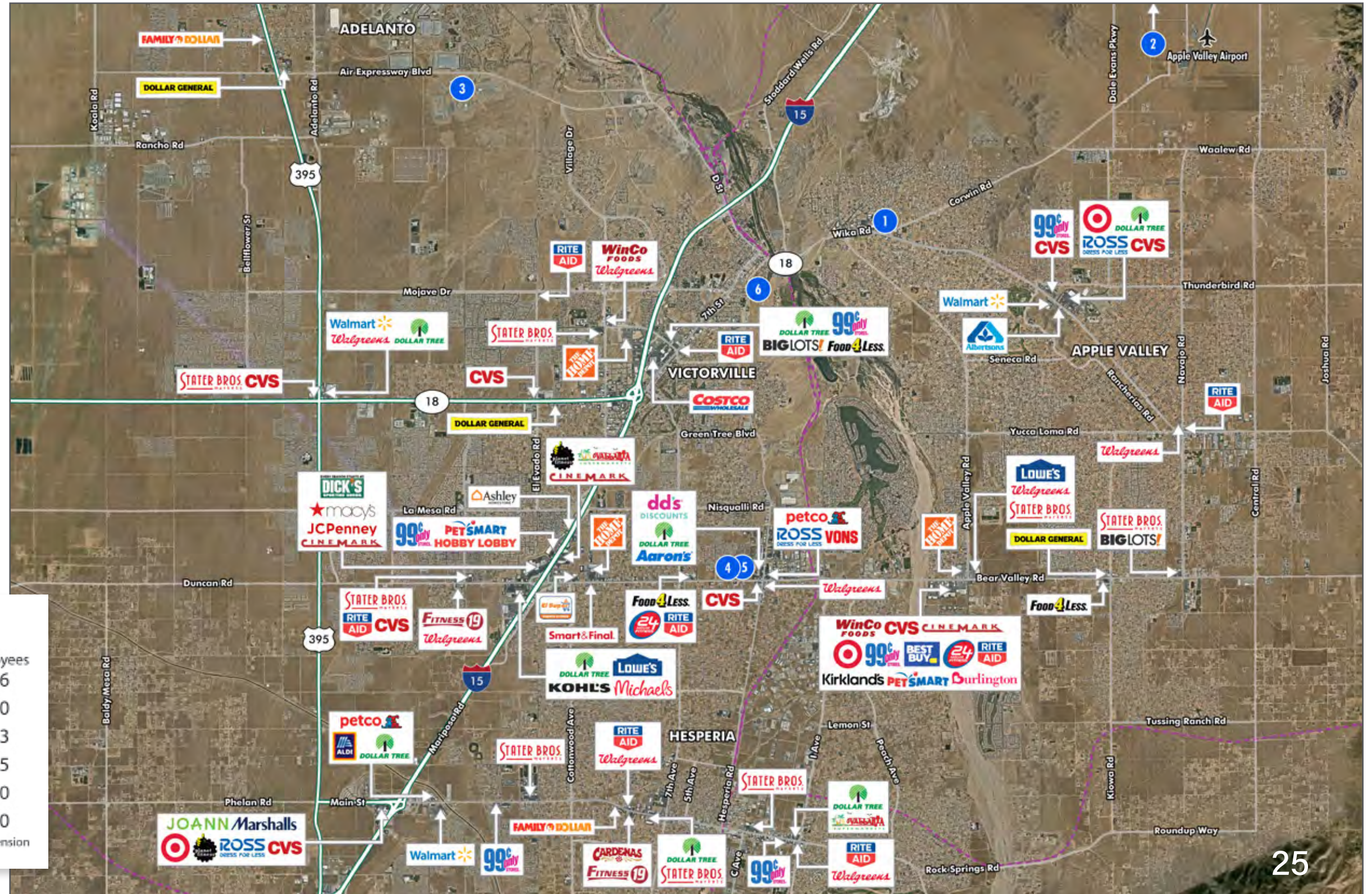


# TOP 5 EMPLOYERS





# VICTOR VALLEY AREA



## Top 6 Employers (Victor Valley)

Employer	Employees
1. St Mary's Medical Ctr	686
2. Big Lots	600
3. Department of Justice	523
4. Prime Healthcare Svc Inc.	475
5. Desert Valley Hospital	400
6. Victor Valley Global Med Ctr	400

\*CBRE FastReport Dimension



# REDLANDS AREA



## Top 5 Employers (Redlands)

Employer	Employees
1. Loma Linda Univ Health Board	9000
2. Loma Linda Univ Med Ctr	7123
3. Esri	4001
4. Arrowhead Regional Medical Ctr	2903
5. San Bernardino County Sheriff	2600

\*CBRE FastReport Dimension



# RANCHO CUCAMONGA / ONTARIO AREA



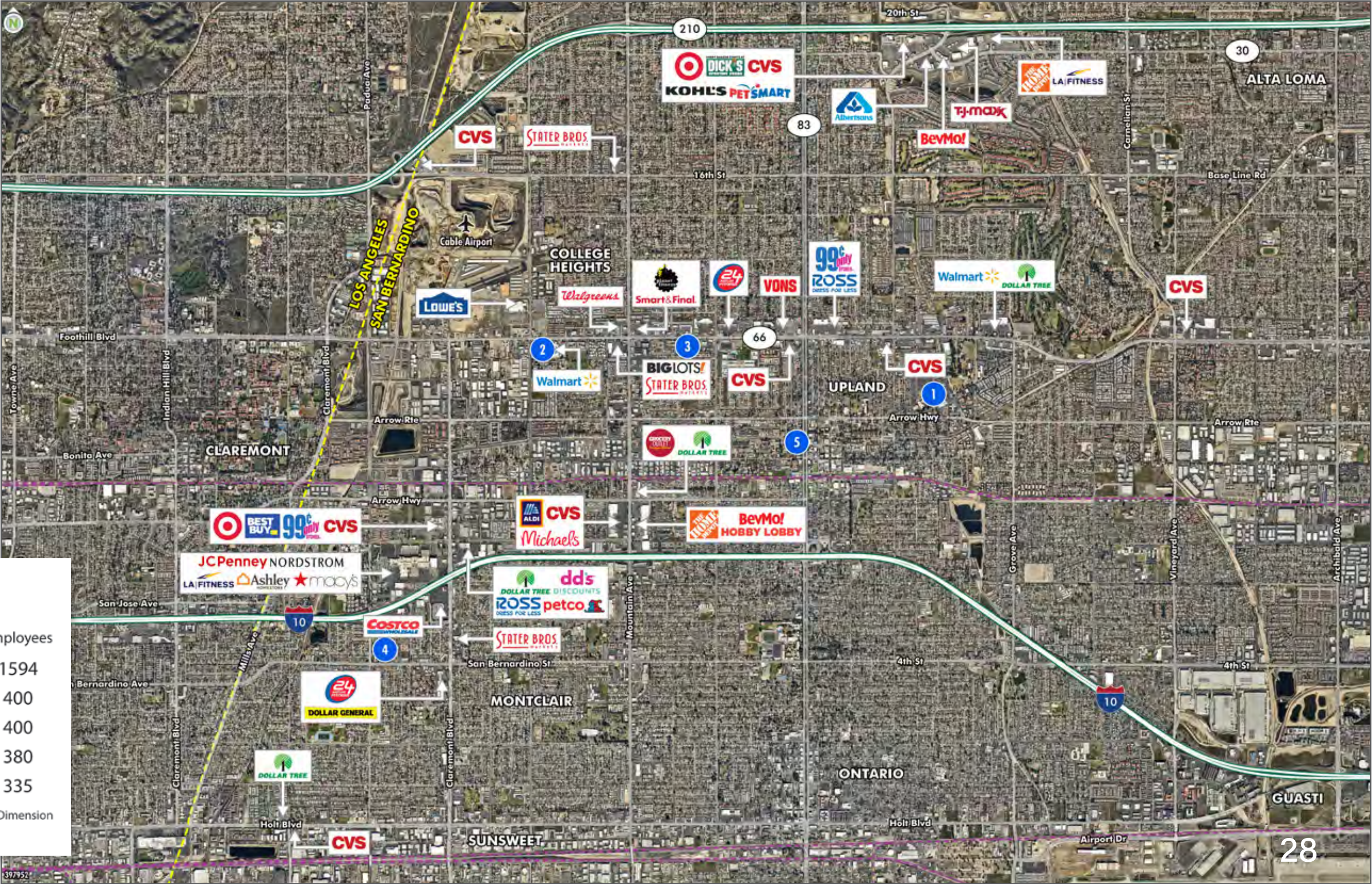
## Top 7 Employers (Rancho Cucamonga-Ontario)

Employer	Employees
1. Ontario International Airport	6000
2. Ontario Montclair School Dist	2500
3. Inland Empire Health Plan	2000
4. Kindred Healthcare	1000
5. Securitas Security Svc USA	600
6. Mercury Insurance Co	600
7. Frito-Lay Inc	600

\*CBRE FastReport Dimension



# MONTCLAIR AREA





The map displays the Chino Hills area, bounded by Diamond Bar Blvd to the north, San Bernardino to the west, Los Angeles to the south, and Riverside to the east. Major highways shown include I-60, SR-78, and SR-91. Key retail locations are marked with logos: CVS, Walgreens, Target, Ross, PetSmart, Dollar Tree, Rite Aid, Home Depot, and others. The map also shows local landmarks like Chino Hills Park and Chino Hills High School. A legend on the left side provides information about employee counts for different dimensions.

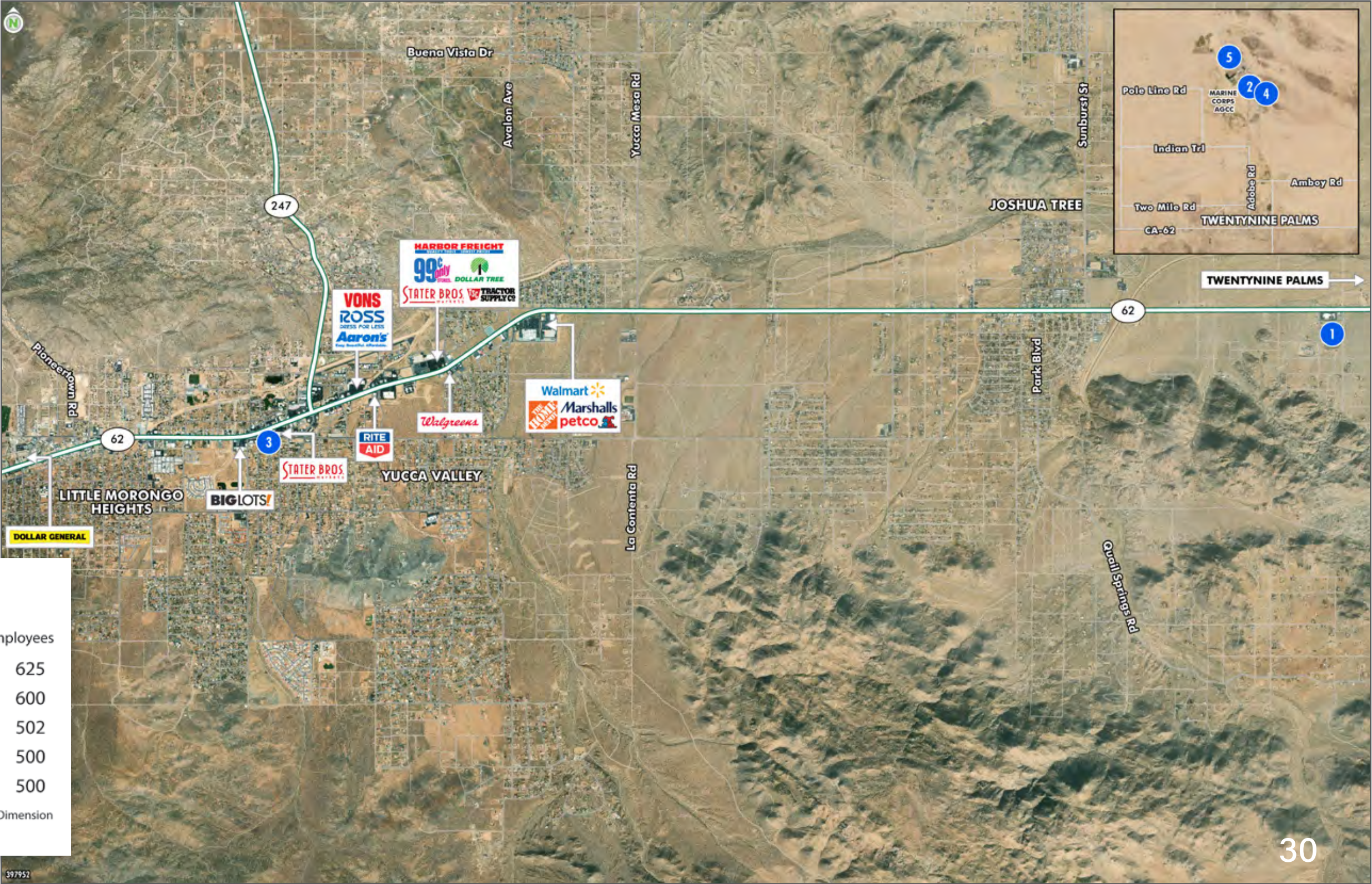
Dimension	Employee Count
1000	1000
600	600
600	600
500	500
401	401

Employer	Employees
1. Lights Of America Inc.	1000
2. Walmart Supercenter	600
3. Chino Valley Medical Ctr	600
4. Motivational Fulfillment/Pkg	500
5. Hussmann Corp	401

\*CBRE FastReport Dimension



# MORONGO BASIN AREA



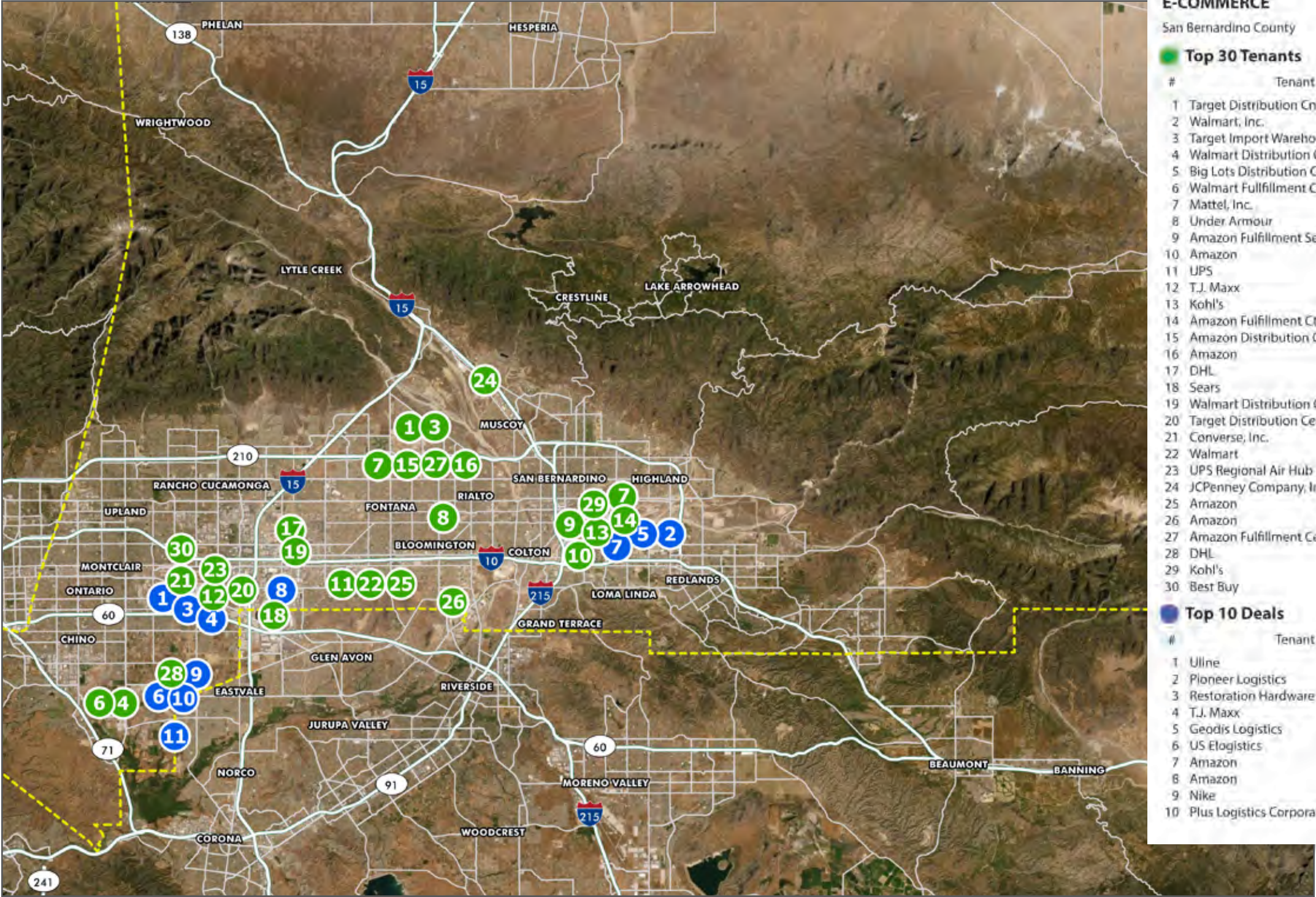


# E-COMMERCE





# E-COMMERCE TENANTS & TRANSACTIONS San Bernardino County



E-COMMERCE				
San Bernardino County				
Top 30 Tenants				
#	Tenant	Address	City	Sq. Ft.
1	Target Distribution Cntr	3105-3110 N Alder Ave	Rialto	1,600,000
2	Walmart, Inc.	21101 Johnson Rd	Apple Valley	1,500,000
3	Target Import Warehouse	3110 N Alder Ave	Rialto	1,500,000
4	Walmart Distribution Center	6720 Kimball Ave	Chino	1,434,000
5	Big Lots Distribution Center	18880 Navajo Rd	Apple Valley	1,350,000
6	Walmart Fulfillment Center	6750 Kimball Ave	Chino	1,219,500
7	Mattel, Inc.	1456 E Harry Sheppard Blvd	San Bernardino	1,200,000
8	Under Armour	2510-2580 W Walnut Ave	Rialto	1,197,051
9	Amazon Fulfillment Services, Inc.	555 E Orange Show Rd	San Bernardino	1,102,639
10	Amazon	1494 S Waterman Ave	San Bernardino	1,032,072
11	UPS	11281 Citrus Ave	Fontana	1,003,570
12	T.J. Maxx	3000 E Philadelphia St	Ontario	991,100
13	Kohl's	825 E Central Ave	San Bernardino	970,021
14	Amazon Fulfillment Ctr	1910 E Central Ave	San Bernardino	951,660
15	Amazon Distribution Center	2450-2496 W Walnut Ave	Rialto	882,230
16	Amazon	1660 N Linden Ave	Rialto	855,000
17	DHL	9211 Kaiser Way	Fontana	830,000
18	Sears	5691 E Philadelphia St	Ontario	802,201
19	Walmart Distribution Center	13550 Valley Blvd	Fontana	758,476
20	Target Distribution Center	1505 S Haven Ave	Ontario	725,000
21	Converse, Inc.	1460 S Hofer Ranch Rd	Ontario	656,040
22	Walmart	11188 Citrus Ave	Fontana	639,473
23	UPS Regional Air Hub	3140 Jurupa St	Ontario	632,204
24	JCPenney Company, Inc.	5959 Palm Ave	San Bernardino	624,627
25	Amazon	11263 Oleander Ave	Fontana	615,971
26	Amazon	3388 S Cactus Ave	Bloomington	615,310
27	Amazon Fulfillment Center	1568 N Linden Ave	Rialto	614,848
28	DHL	5331 S Carpenter Ave	Ontario	589,012
29	Kohl's	890 E Mill St	San Bernardino	575,000
30	Best Buy	2104 Jay St	Ontario	573,266
Top 10 Deals				
#	Tenant	Address	City	Sq. Ft.
1	Uline	4810 S Hellman Ave	Ontario	1,245,049
2	Pioneer Logistics	9180 Alabama St	Redlands	1,079,236
3	Restoration Hardware	5170 S Archibald Ave	Ontario	1,000,930
4	T.J. Maxx	3000 E Philadelphia St	Ontario	991,110
5	Geodis Logistics	1950 Palmetto Ave	Redlands	809,338
6	US Elogistics	2221 Remington Ave	Chino	700,280
7	Amazon	1895 Marigold St	Redlands	699,350
8	Amazon	11200 Iberia St	Fontana	606,112
9	Nike	5331 Carpenter Ave	Ontario	589,012
10	Plus Logistics Corporation	8975 Remington Ave	Chino	566,210

\*CBRE Research



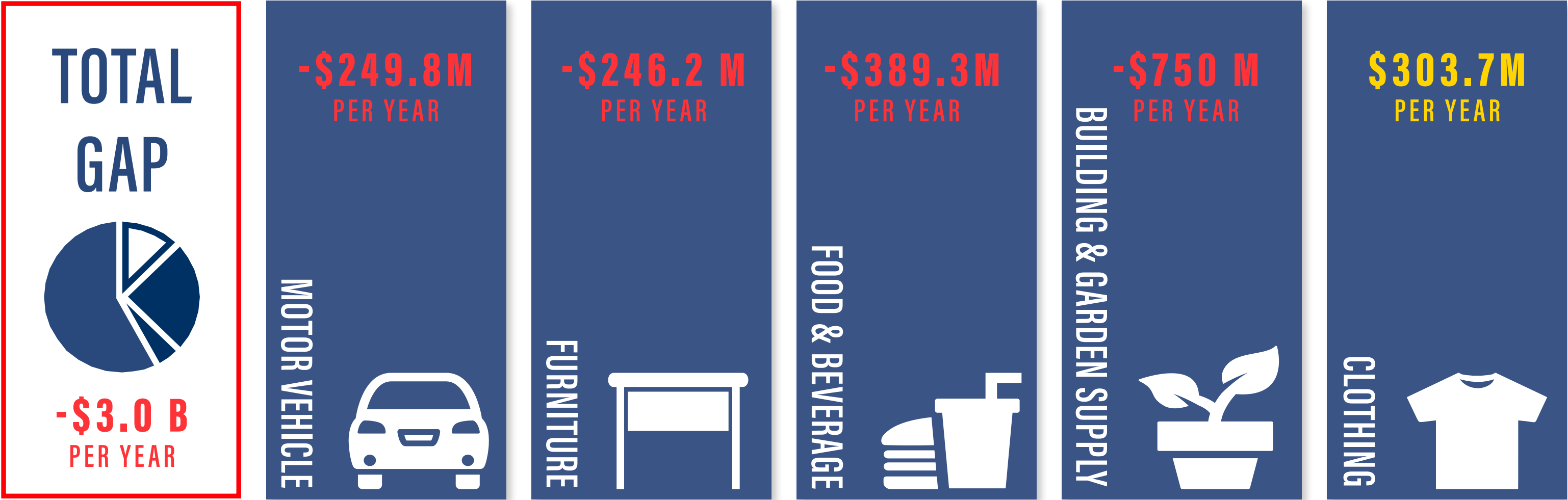
# GAP ANALYSIS





# GAP REPORT

## San Bernardino County



Red (negative number) = retailers attracting out-of-town spenders - overabundance of supply in the subject area

Yellow (positive number) = opportunity gap – residents spending outside the area - demand exceeds supply



	SALES	POTENTIAL	GAP	FACTOR	BUSINESSES
Total Retail Sales (including Food and Drink Sales)	\$26,492,277,613	\$23,491,435,959	-\$3,000,841,654	-6.00	12,373
Retail Trade Sales (44-45)	\$23,915,760,082	\$21,198,869,144	-\$2,716,890,938	-6.00	8,604
Motor Vehicle and Parts Dealers (441)	\$4,688,000,323	\$4,438,240,307	-\$249,760,016	-2.70	1,216
Automobile Dealers (4411)	\$3,478,100,656	\$3,516,146,084	\$38,045,428	0.50	383
Other Motor Vehicle Dealers (4412)	\$561,325,894	\$541,220,311	-\$20,105,583	-1.80	157
Auto Parts, Accessory and Tire Stores (4413)	\$648,573,773	\$380,873,912	-\$267,699,861	-26.00	676
Furniture and Home Furnishing Stores (442)	\$1,032,741,553	\$786,538,312	-\$246,203,241	-13.50	530
Furniture Stores (4421)	\$761,217,695	\$409,285,644	-\$351,932,051	-30.10	256
Home Furnishings Stores (4422)	\$271,523,858	\$377,252,669	\$105,728,811	16.30	274
Electronics and Appliance Stores (443)	\$573,349,043	\$780,241,525	\$206,892,482	15.30	396
Electronics and Appliance Stores (4431)	\$573,349,043	\$780,241,525	\$206,892,482	15.30	396
Building Material, Garden Equipment and Supply Stores (444)	\$2,045,704,005	\$1,295,700,931	-\$750,003,074	-22.40	767
Building Material and Supplies Dealers (4441)	\$1,998,511,574	\$1,208,560,142	-\$789,951,432	-24.60	665
Lawn, Garden Equipment and Supply Stores (4442)	\$47,192,431	\$87,140,789	\$39,948,358	29.70	102
Food and Beverage Stores (445)	\$3,807,223,020	\$3,417,945,058	-\$389,277,962	-5.40	1,162
Grocery Stores (4451)	\$3,517,509,185	\$2,924,363,794	-\$593,145,391	-9.20	677
Specialty Food Stores (4452)	\$119,550,596	\$242,387,085	\$122,836,489	33.90	241
Beer, Wine and Liquor Stores (4453)	\$170,163,239	\$251,194,180	\$81,030,941	19.20	244
Health and Personal Care Stores (446)	\$1,091,657,232	\$1,453,054,886	\$361,397,654	14.20	625
Health and Personal Care Stores (4461)	\$1,091,657,232	\$1,453,054,886	\$361,397,654	14.20	625
Gasoline Stations (447)	\$3,334,687,666	\$1,897,867,619	-\$1,436,820,047	-27.50	563
Gasoline Stations (4471)	\$3,334,687,666	\$1,897,867,619	-\$1,436,820,047	-27.50	563
Clothing and Accessories Stores (448)	\$1,208,561,956	\$1,512,264,219	\$303,702,263	11.20	1,072
Clothing Stores (4481)	\$817,369,899	\$1,080,152,524	\$262,782,625	13.80	685
Shoe Stores (4482)	\$267,447,219	\$189,662,409	-\$77,784,810	-17.00	183
Jewelry, Luggage and Leather Goods Stores (4483)	\$123,744,838	\$242,449,286	\$118,704,448	32.40	204
Sporting Goods, Hobby, Book and Music Stores (451)	\$663,024,336	\$673,131,204	\$10,106,868	0.80	465
Sporting Goods, Hobby and Music Instrument Stores (4511)	\$606,484,242	\$582,335,576	-\$24,148,666	-2.00	408
Book, Periodical and Music Stores (4512)	\$56,540,094	\$90,795,628	\$34,255,534	23.20	57
General Merchandise Stores (452)	\$4,466,617,953	\$3,539,667,673	-\$926,950,280	-11.60	455
Dept Stores excl Leased Depts (4521)	\$2,977,069,957	\$2,113,923,481	-\$863,146,476	-17.00	180
Other General Merchandise Stores (4529)	\$1,489,547,996	\$1,425,744,192	-\$63,803,804	-2.20	275
Miscellaneous Store Retailers (453)	\$894,525,624	\$787,145,776	-\$107,379,848	-6.40	1,216
Florists (4531)	\$16,279,973	\$36,866,778	\$20,586,805	38.70	107
Office Supply, Stationery and Gift Stores (4532)	\$206,038,518	\$180,173,229	-\$25,865,289	-6.70	293
Used Merchandise Stores (4533)	\$80,477,132	\$82,807,853	\$2,330,721	1.40	179
Other Misc Store Retailers (4539)	\$591,730,001	\$487,297,916	-\$104,432,085	-9.70	637
Nonstore Retailers (454)	\$109,667,372	\$617,071,634	\$507,404,262	69.80	137
E-Shopping and Mail-Order Houses (4541)	\$82,396,355	\$535,511,483	\$453,115,128	73.30	63
Vending Machine Operators (4542)	\$2,789,878	\$9,502,087	\$6,712,209	54.60	16
Direct Selling Establishments (4543)	\$24,481,139	\$72,058,064	\$47,576,925	49.30	58
Food Services and Drinking Places (722)	\$2,576,517,531	\$2,292,566,815	-\$283,950,716	-5.80	3,769
Special Food Services (7223)	\$14,307,066	\$46,700,512	\$32,393,446	53.10	49
Drinking Places-Alcohol (7224)	\$28,751,657	\$48,318,702	\$19,567,045	25.40	103

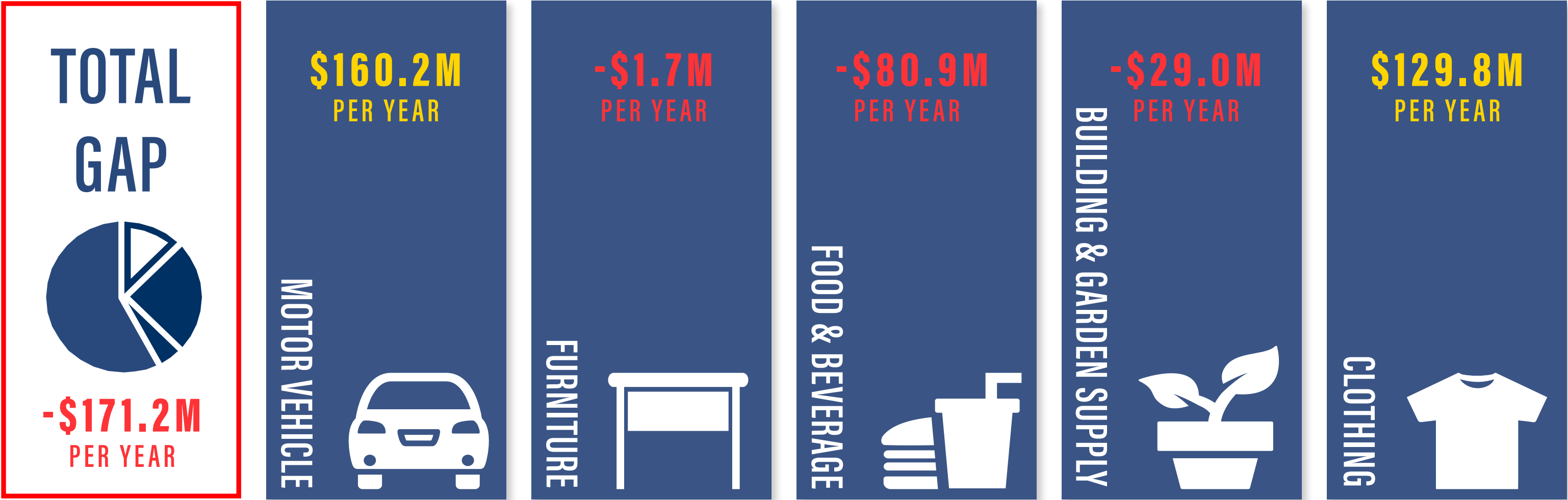
GAP ANALYSIS

San Bernardino County  
GAP REPORT



# GAP REPORT

Victor Valley



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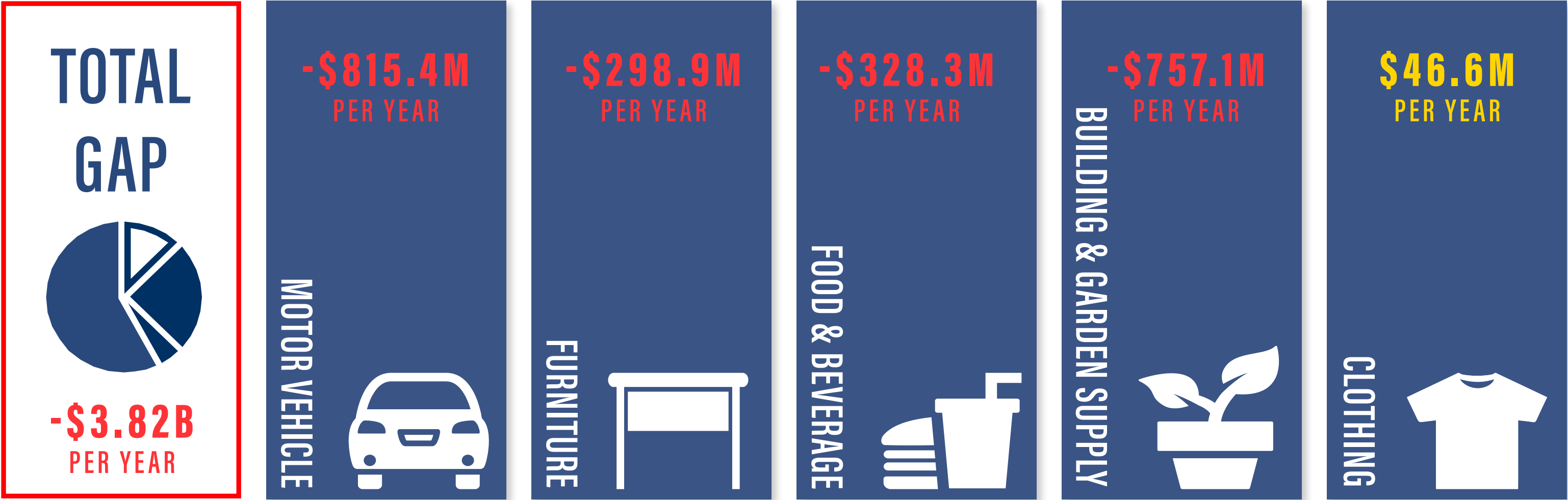
	SALES	POTENTIAL	GAP	FACTOR	BUSINESSES
Total Retail Sales (including Food and Drink Sales)	\$4,539,552,440	\$4,368,399,139	-\$171,153,301	-1.90	2,176
Retail Trade Sales (44-45)	\$4,087,877,689	\$3,951,767,792	-\$136,109,897	-1.70	1,522
Motor Vehicle and Parts Dealers (441)	\$681,547,617	\$841,791,252	\$160,243,635	10.50	226
Automobile Dealers (4411)	\$478,991,000	\$668,039,224	\$189,048,224	16.50	59
Other Motor Vehicle Dealers (4412)	\$106,038,651	\$102,914,693	-\$3,123,958	-1.50	36
Auto Parts, Accessory and Tire Stores (4413)	\$96,517,966	\$70,837,335	-\$25,680,631	-15.30	131
Furniture and Home Furnishing Stores (442)	\$146,163,827	\$144,510,148	-\$1,653,679	-0.60	79
Furniture Stores (4421)	\$110,331,240	\$75,210,757	-\$35,120,483	-18.90	38
Home Furnishings Stores (4422)	\$35,832,587	\$69,299,391	\$33,466,804	31.80	41
Electronics and Appliance Stores (443)	\$93,228,282	\$142,921,804	\$49,693,522	21.00	62
Electronics and Appliance Stores (4431)	\$93,228,282	\$142,921,804	\$49,693,522	21.00	62
Building Material, Garden Equipment and Supply Stores (444)	\$275,271,978	\$246,269,872	-\$29,002,106	-5.60	112
Building Material and Supplies Dealers (4441)	\$270,247,034	\$229,754,860	-\$40,492,174	-8.10	96
Lawn, Garden Equipment and Supply Stores (4442)	\$5,024,945	\$16,515,013	\$11,490,068	53.30	16
Food and Beverage Stores (445)	\$715,122,167	\$634,271,720	-\$80,850,447	-6.00	207
Grocery Stores (4451)	\$660,283,291	\$543,348,891	-\$116,934,400	-9.70	106
Specialty Food Stores (4452)	\$16,133,599	\$44,970,109	\$28,836,510	47.20	45
Beer, Wine and Liquor Stores (4453)	\$38,705,277	\$45,952,720	\$7,247,443	8.60	56
Health and Personal Care Stores (446)	\$228,490,427	\$274,143,829	\$45,653,402	9.10	122
Health and Personal Care Stores (4461)	\$228,490,427	\$274,143,829	\$45,653,402	9.10	122
Gasoline Stations (447)	\$819,844,881	\$359,786,009	-\$460,058,872	-39.00	129
Gasoline Stations (4471)	\$819,844,881	\$359,786,009	-\$460,058,872	-39.00	129
Clothing and Accessories Stores (448)	\$141,505,152	\$271,311,276	\$129,806,124	31.40	162
Clothing Stores (4481)	\$96,361,730	\$194,554,221	\$98,192,491	33.80	104
Shoe Stores (4482)	\$30,922,427	\$34,335,446	\$3,413,019	5.20	28
Jewelry, Luggage and Leather Goods Stores (4483)	\$14,220,995	\$42,421,608	\$28,200,613	49.80	30
Sporting Goods, Hobby, Book and Music Stores (451)	\$87,080,309	\$122,177,192	\$35,096,883	16.80	68
Sporting Goods, Hobby and Music Instrument Stores (4511)	\$77,626,093	\$105,767,286	\$28,141,193	15.30	62
Book, Periodical and Music Stores (4512)	\$9,454,216	\$16,409,906	\$6,955,690	26.90	6
General Merchandise Stores (452)	\$726,513,989	\$653,727,884	-\$72,786,105	-5.30	79
Dept Stores excl Leased Depts (4521)	\$633,174,538	\$386,936,161	-\$246,238,377	-24.10	34
Other General Merchandise Stores (4529)	\$93,339,451	\$266,791,724	\$173,452,273	48.20	45
Miscellaneous Store Retailers (453)	\$156,733,401	\$147,927,154	-\$8,806,247	-2.90	242
Florists (4531)	\$2,723,676	\$6,606,129	\$3,882,453	41.60	16
Office Supply, Stationery and Gift Stores (4532)	\$43,729,805	\$33,109,257	-\$10,620,548	-13.80	53
Used Merchandise Stores (4533)	\$16,567,776	\$15,070,240	-\$1,497,536	-4.70	45
Other Misc Store Retailers (4539)	\$93,712,144	\$93,141,529	-\$570,615	-0.30	128
Nonstore Retailers (454)	\$16,375,659	\$112,929,651	\$96,553,992	74.70	35
E-Shopping and Mail-Order Houses (4541)	\$8,780,892	\$97,653,334	\$88,872,442	83.50	15
Vending Machine Operators (4542)	\$0	\$1,761,789	\$1,761,789	100.00	0
Direct Selling Establishments (4543)	\$7,594,767	\$13,514,529	\$5,919,762	28.00	20
Food Services and Drinking Places (722)	\$451,674,750	\$416,631,347	-\$35,043,403	-4.00	655
Special Food Services (7223)	\$633,781	\$8,532,079	\$7,898,298	86.20	7
Drinking Places-Alcohol (7224)	\$2,976,534	\$8,605,618	\$5,629,084	48.60	20

GAP ANALYSIS



# GAP REPORT

East/West San Bernardino County



Red (negative number) = retailers attracting out-of-town spenders - overabundance of supply in the subject area

Yellow (positive number) = opportunity gap – residents spending outside the area - demand exceeds supply



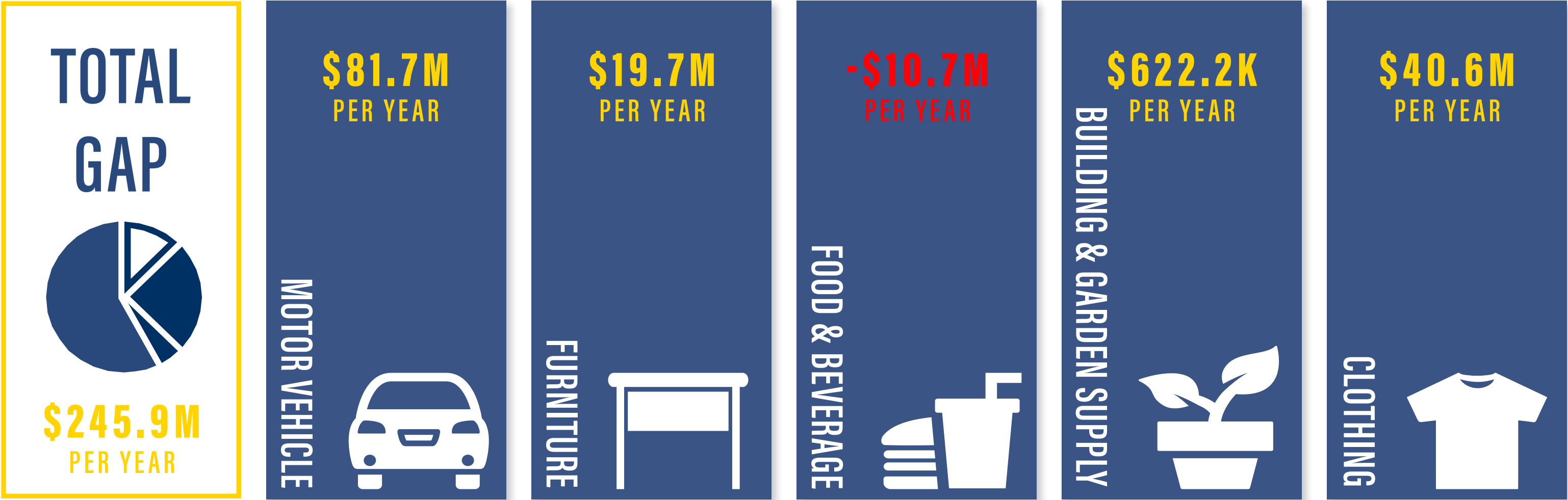
East/West San Bernardino County  
GAP REPORT

	SALES	POTENTIAL	GAP	FACTOR	BUSINESSES
Total Retail Sales (including Food and Drink Sales)	\$20,360,493,652	\$16,537,318,009	-\$3,823,175,643	-10.40	8,986
Retail Trade Sales (44-45)	\$18,436,097,505	\$14,901,408,895	-\$3,534,688,610	-10.60	6,257
Motor Vehicle and Parts Dealers (441)	\$3,904,093,507	\$3,088,692,600	-\$815,400,907	-11.70	920
Automobile Dealers (4411)	\$2,952,185,367	\$2,445,338,326	-\$506,847,041	-9.40	314
Other Motor Vehicle Dealers (4412)	\$435,853,624	\$375,415,689	-\$60,437,935	-7.40	109
Auto Parts, Accessory and Tire Stores (4413)	\$516,054,517	\$267,938,585	-\$248,115,932	-31.60	497
Furniture and Home Furnishing Stores (442)	\$857,860,748	\$558,992,370	-\$298,868,378	-21.10	405
Furniture Stores (4421)	\$637,956,405	\$291,117,932	-\$346,838,473	-37.30	203
Home Furnishings Stores (4422)	\$219,904,343	\$267,874,438	\$47,970,095	9.80	202
Electronics and Appliance Stores (443)	\$452,396,099	\$554,372,621	\$101,976,522	10.10	297
Electronics and Appliance Stores (4431)	\$452,396,099	\$554,372,621	\$101,976,522	10.10	297
Building Material, Garden Equipment and Supply Stores (444)	\$1,656,867,240	\$899,802,352	-\$757,064,888	-29.60	579
Building Material and Supplies Dealers (4441)	\$1,620,735,933	\$840,113,380	-\$780,622,553	-31.70	507
Lawn, Garden Equipment and Supply Stores (4442)	\$36,131,308	\$59,688,972	\$23,557,664	24.60	71
Food and Beverage Stores (445)	\$2,736,689,876	\$2,408,377,776	-\$328,312,100	-6.40	838
Grocery Stores (4451)	\$2,526,626,580	\$2,059,721,733	-\$466,904,847	-10.20	497
Specialty Food Stores (4452)	\$94,159,448	\$170,927,548	\$76,768,100	29.00	175
Beer, Wine and Liquor Stores (4453)	\$115,903,848	\$177,728,494	\$61,824,646	21.10	165
Health and Personal Care Stores (446)	\$791,488,917	\$1,012,093,594	\$220,604,677	12.20	450
Health and Personal Care Stores (4461)	\$791,488,917	\$1,012,093,594	\$220,604,677	12.20	450
Gasoline Stations (447)	\$2,111,864,637	\$1,325,104,995	-\$786,759,642	-22.90	355
Gasoline Stations (4471)	\$2,111,864,637	\$1,325,104,995	-\$786,759,642	-22.90	355
Clothing and Accessories Stores (448)	\$1,039,724,161	\$1,086,336,568	\$46,612,407	2.20	843
Clothing Stores (4481)	\$703,437,893	\$774,617,064	\$71,179,171	4.80	535
Shoe Stores (4482)	\$230,232,840	\$136,092,236	-\$94,140,604	-25.70	148
Jewelry, Luggage and Leather Goods Stores (4483)	\$106,053,428	\$175,627,269	\$69,573,841	24.70	160
Sporting Goods, Hobby, Book and Music Stores (451)	\$541,045,106	\$480,478,039	-\$60,567,067	-5.90	333
Sporting Goods, Hobby and Music Instrument Stores (4511)	\$497,604,550	\$415,569,046	-\$82,035,504	-9.00	292
Book, Periodical and Music Stores (4512)	\$43,440,556	\$64,908,994	\$21,468,438	19.80	41
General Merchandise Stores (452)	\$3,587,065,126	\$2,502,538,840	-\$1,084,526,286	-17.80	338
Dept Stores excl Leased Depts (4521)	\$2,238,662,575	\$1,502,037,568	-\$736,625,007	-19.70	136
Other General Merchandise Stores (4529)	\$1,348,402,551	\$1,000,501,272	-\$347,901,279	-14.80	202
Miscellaneous Store Retailers (453)	\$670,514,447	\$548,375,837	-\$122,138,610	-10.00	808
Florists (4531)	\$11,979,295	\$26,124,310	\$14,145,015	37.10	80
Office Supply, Stationery and Gift Stores (4532)	\$145,312,380	\$127,827,952	-\$17,484,428	-6.40	191
Used Merchandise Stores (4533)	\$53,789,421	\$59,000,872	\$5,211,451	4.60	94
Other Misc Store Retailers (4539)	\$459,433,352	\$335,422,702	-\$124,010,650	-15.60	443
Nonstore Retailers (454)	\$86,487,640	\$436,243,304	\$349,755,664	66.90	91
E-Shopping and Mail-Order Houses (4541)	\$68,485,102	\$380,925,731	\$312,440,629	69.50	42
Vending Machine Operators (4542)	\$2,789,878	\$6,703,871	\$3,913,993	41.20	16
Direct Selling Establishments (4543)	\$15,212,660	\$48,613,702	\$33,401,042	52.30	33
Food Services and Drinking Places (722)	\$1,924,396,147	\$1,635,909,115	-\$288,487,032	-8.10	2,729
Special Food Services (7223)	\$13,263,019	\$33,214,284	\$19,951,265	42.90	38
Drinking Places-Alcohol (7224)	\$23,269,243	\$34,726,067	\$11,456,824	19.80	69



# GAP REPORT

## Morongo Basin



Red (negative number) = retailers attracting out-of-town spenders - overabundance of supply in the subject area

Yellow (positive number) = opportunity gap – residents spending outside the area - demand exceeds supply



	SALES	POTENTIAL	GAP	FACTOR	BUSINESSES
Total Retail Sales (including Food and Drink Sales)	\$516,261,529	\$762,120,199	\$245,858,670	19.20	341
Retail Trade Sales (44-45)	\$457,605,845	\$691,342,791	\$233,736,946	20.30	239
Motor Vehicle and Parts Dealers (441)	\$67,688,479	\$149,426,470	\$81,737,991	37.60	28
Automobile Dealers (4411)	\$45,530,303	\$118,815,535	\$73,285,232	44.60	8
Other Motor Vehicle Dealers (4412)	\$7,063,412	\$18,242,816	\$11,179,404	44.20	3
Auto Parts, Accessory and Tire Stores (4413)	\$15,094,764	\$12,368,119	-\$2,726,645	-9.90	17
Furniture and Home Furnishing Stores (442)	\$4,409,542	\$24,131,934	\$19,722,392	69.10	7
Furniture Stores (4421)	\$2,676,577	\$12,723,262	\$10,046,685	65.20	3
Home Furnishings Stores (4422)	\$1,732,965	\$11,408,673	\$9,675,708	73.60	4
Electronics and Appliance Stores (443)	\$5,957,484	\$24,193,404	\$18,235,920	60.50	13
Electronics and Appliance Stores (4431)	\$5,957,484	\$24,193,404	\$18,235,920	60.50	13
Building Material, Garden Equipment and Supply Stores (444)	\$40,991,518	\$41,613,684	\$622,166	0.80	18
Building Material and Supplies Dealers (4441)	\$40,331,504	\$38,582,334	-\$1,749,170	-2.20	15
Lawn, Garden Equipment and Supply Stores (4442)	\$660,014	\$3,031,349	\$2,371,335	64.20	3
Food and Beverage Stores (445)	\$123,055,248	\$112,348,032	-\$10,707,216	-4.50	29
Grocery Stores (4451)	\$116,375,220	\$96,245,324	-\$20,129,896	-9.50	19
Specialty Food Stores (4452)	\$302,416	\$7,953,365	\$7,650,949	92.70	2
Beer, Wine and Liquor Stores (4453)	\$6,377,612	\$8,149,343	\$1,771,731	12.20	8
Health and Personal Care Stores (446)	\$21,481,449	\$49,273,749	\$27,792,300	39.30	20
Health and Personal Care Stores (4461)	\$21,481,449	\$49,273,749	\$27,792,300	39.30	20
Gasoline Stations (447)	\$54,187,779	\$63,935,941	\$9,748,162	8.30	17
Gasoline Stations (4471)	\$54,187,779	\$63,935,941	\$9,748,162	8.30	17
Clothing and Accessories Stores (448)	\$4,699,058	\$45,310,851	\$40,611,793	81.20	13
Clothing Stores (4481)	\$3,014,875	\$32,700,905	\$29,686,030	83.10	8
Shoe Stores (4482)	\$1,088,742	\$5,686,963	\$4,598,221	67.90	2
Jewelry, Luggage and Leather Goods Stores (4483)	\$595,441	\$6,922,983	\$6,327,542	84.20	3
Sporting Goods, Hobby, Book and Music Stores (451)	\$10,844,714	\$20,686,610	\$9,841,896	31.20	23
Sporting Goods, Hobby and Music Instrument Stores (4511)	\$9,173,837	\$17,838,868	\$8,665,031	32.10	19
Book, Periodical and Music Stores (4512)	\$1,670,877	\$2,847,742	\$1,176,865	26.00	4
General Merchandise Stores (452)	\$100,227,236	\$114,015,713	\$13,788,477	6.40	15
Dept Stores excl Leased Depts (4521)	\$75,642,665	\$66,559,363	-\$9,083,302	-6.40	5
Other General Merchandise Stores (4529)	\$24,584,571	\$47,456,350	\$22,871,779	31.70	10
Miscellaneous Store Retailers (453)	\$21,893,216	\$26,677,648	\$4,784,432	9.90	52
Florists (4531)	\$484,800	\$1,126,863	\$642,063	39.80	3
Office Supply, Stationery and Gift Stores (4532)	\$4,956,175	\$5,651,817	\$695,642	6.60	11
Used Merchandise Stores (4533)	\$5,034,448	\$2,577,312	-\$2,457,136	-32.30	15
Other Misc Store Retailers (4539)	\$11,417,793	\$17,321,656	\$5,903,863	20.50	23
Nonstore Retailers (454)	\$2,170,122	\$19,728,756	\$17,558,634	80.20	4
E-Shopping and Mail-Order Houses (4541)	\$2,107,832	\$16,676,986	\$14,569,154	77.60	2
Vending Machine Operators (4542)	\$0	\$311,038	\$311,038	100.00	0
Direct Selling Establishments (4543)	\$62,290	\$2,740,732	\$2,678,442	95.60	2
Food Services and Drinking Places (722)	\$58,655,684	\$70,777,408	\$12,121,724	9.40	103
Special Food Services (7223)	\$74,995	\$1,449,089	\$1,374,094	90.20	1
Drinking Places-Alcohol (7224)	\$676,541	\$1,471,870	\$795,329	37.00	5

GAP ANALYSIS

GAP REPORT  
Morongo Basin



# 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.

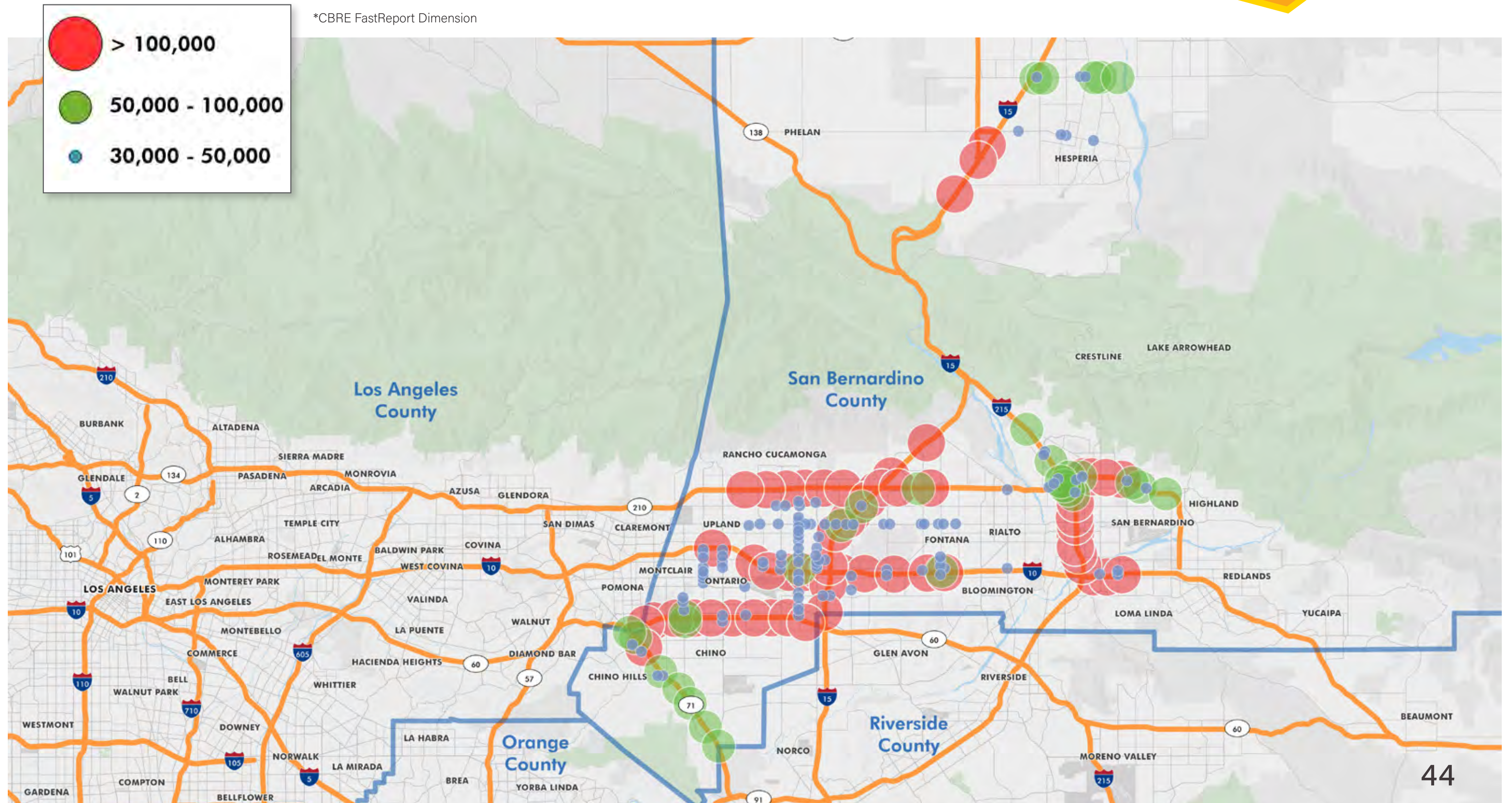


# DAILY TRAFFIC COUNTS





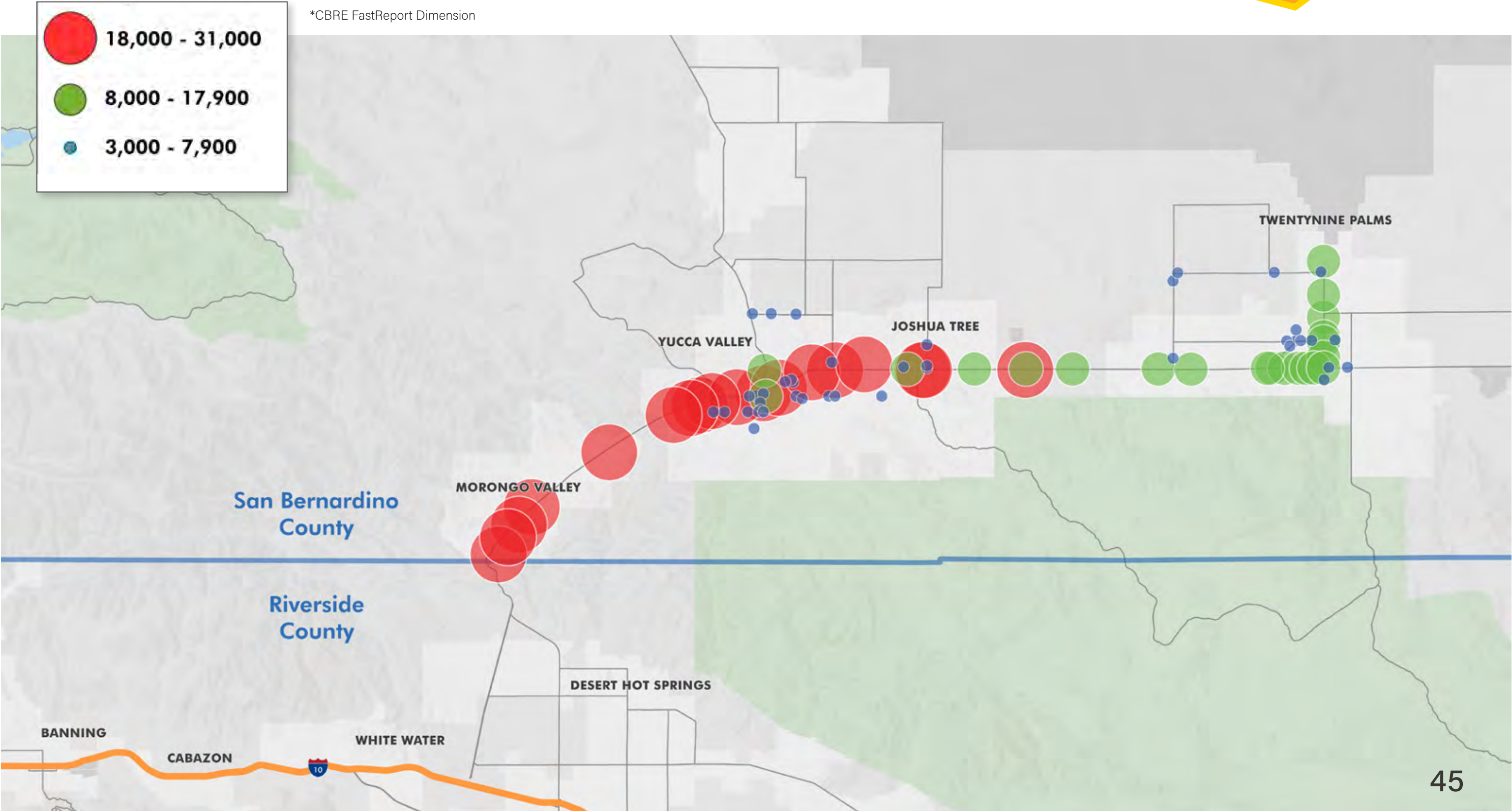
# DAILY TRAFFIC COUNTS





# DAILY TRAFFIC COUNTS

Morongo Basin





# HOUSING ACTIVITY



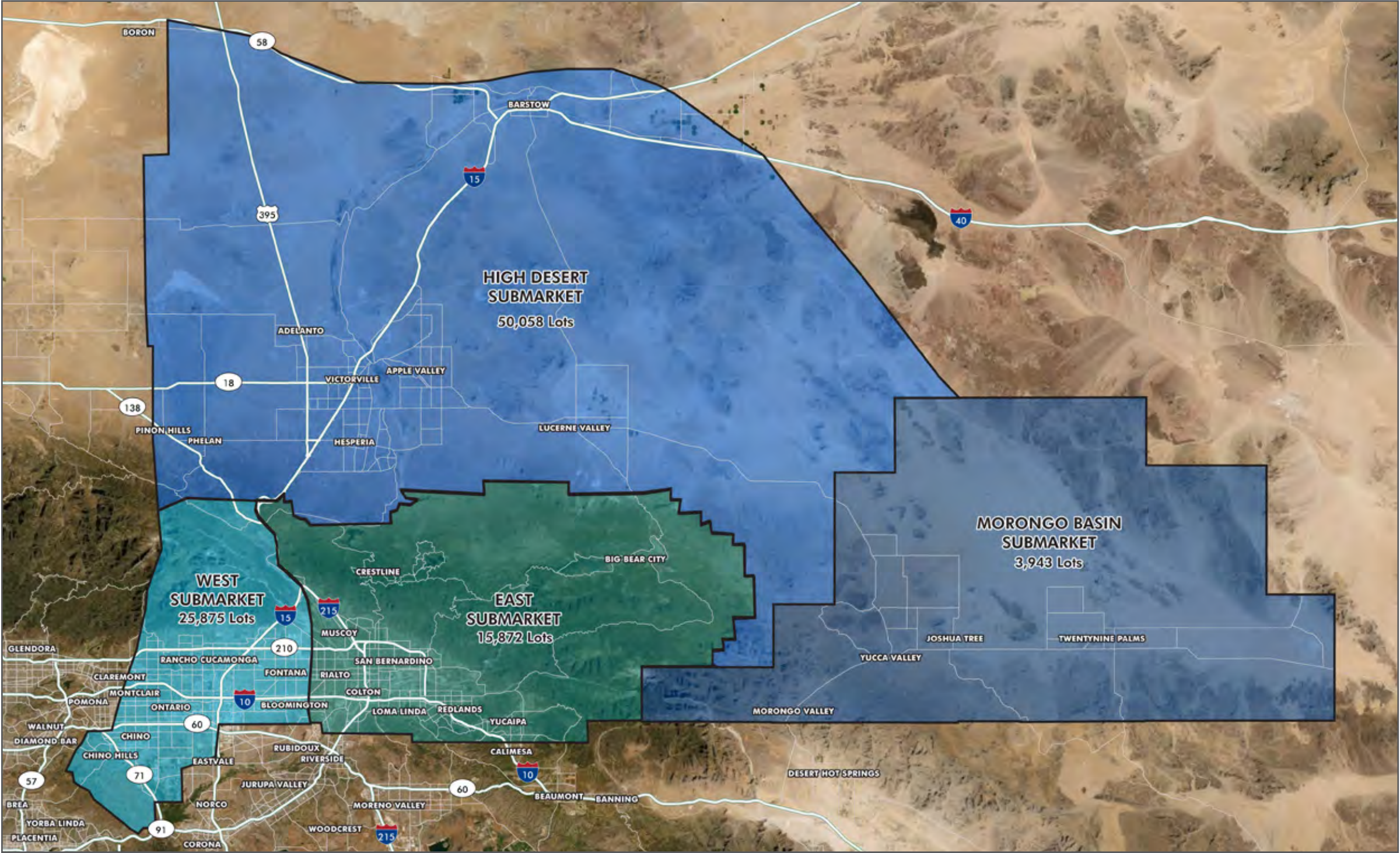


# FUTURE LOTS

## Submarkets

95,748  
Future lots

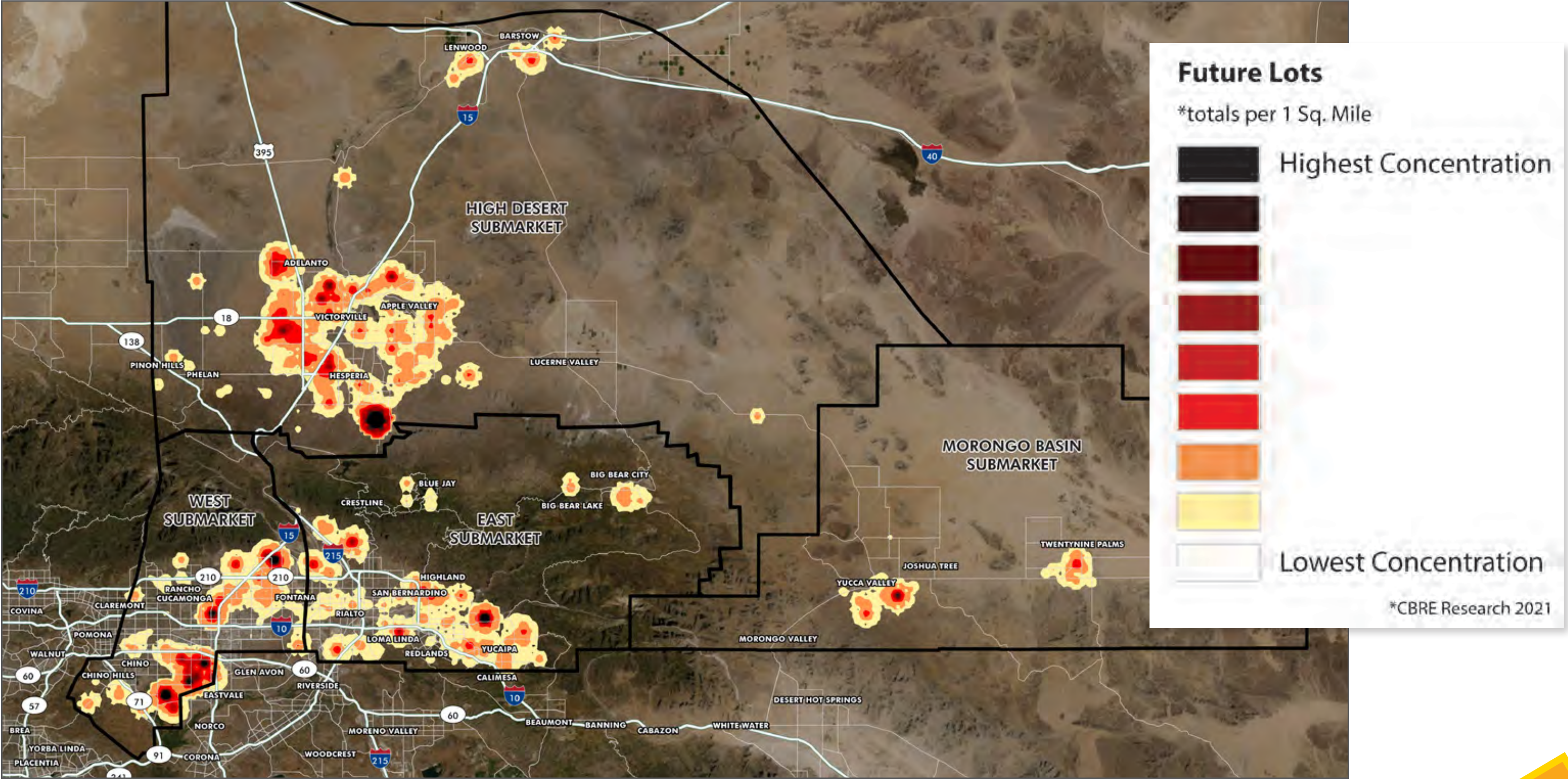
\*CBRE Research 2021





# FUTURE LOTS

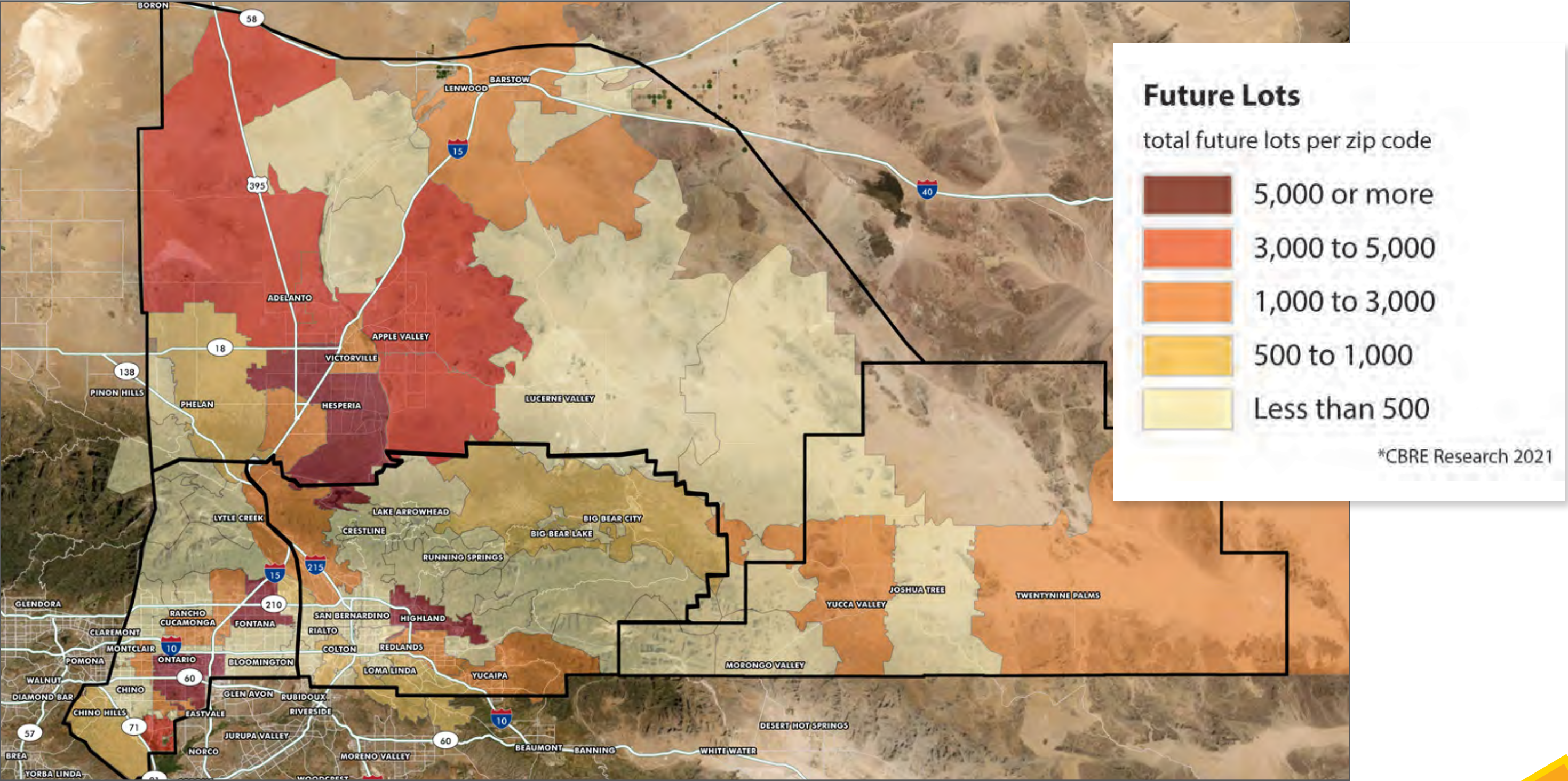
## Heat Map





# HOUSING ACTIVITY

By Zip Code







[www.selectsbcounty.com](http://www.selectsbcounty.com)

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