

DISCOVER

GAP Analysis

The GAP Analysis helps us uncover the number of dollars being spent outside of the community on an annual basis from a categorical perspective.

The difference between demand and supply represents the opportunity gap or surplus available for each merchandise line in the specified reporting geography. When the demand is greater than (less than) the supply, there is an opportunity gap (leakage) for that merchandise line. For example, a positive value signifies an opportunity gap, while a negative value signifies a surplus.

Retail Strategies uses STI: PopStats as our provider of consumer demand and supply by establishment (or GAP) information. Several demographers provide the data in a variety of ways. Following are the sources and methodologies used by STI: PopStats and Retail Strategies to draw conclusions for you.

The market supply data is derived from annual retail sales and expenditures from the source data. The source for market supply is the U.S. Census Bureau's monthly and annual Census of Retail Trade (CRT) Reports; U.S. Census

Bureau's Economic Census. The source for the establishment is the Bureau of Labor Statistics (BLS). The consumer demand data by the establishment is derived from the BLS Consumer Expenditure Survey (CE).

Industries for the consumer expenditures survey are categorized and defined by the North American Industry Classification System (NAICS). Retail Strategies has narrowed down the categories to only those with real estate growth potential based on national trends.

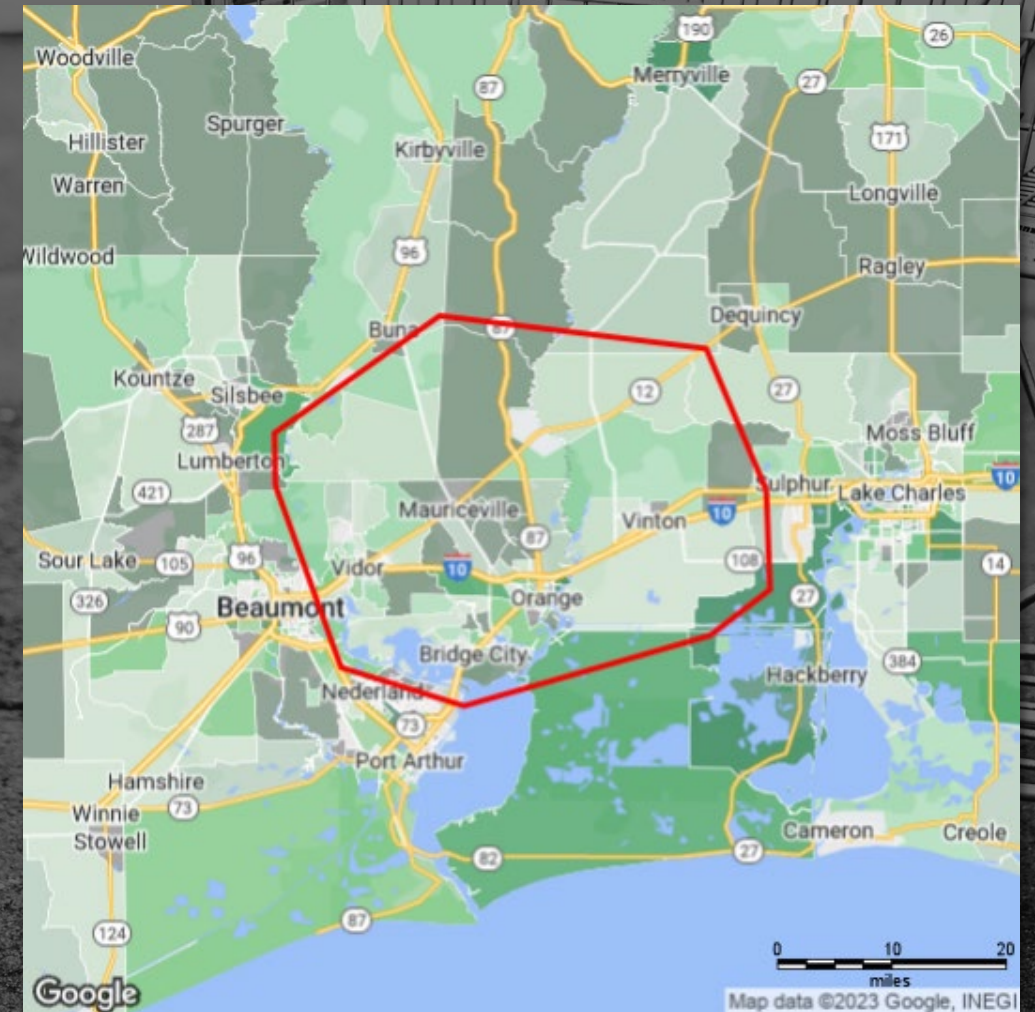
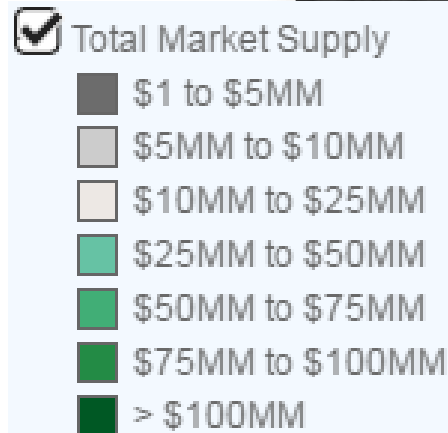
Data is rarely perfect, but proper analysis, it can get us a lot closer to the answer than we would be without it. This is one of several tools used to identify focus categories for recruitment. Our focus in this area is more on the category than the actual dollar amounts.

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Total Market Supply

\$1,597,031,408

This represents the amount captured by businesses located in the defined trade area. By block group, the areas with darker green captured more dollars than the gray areas.

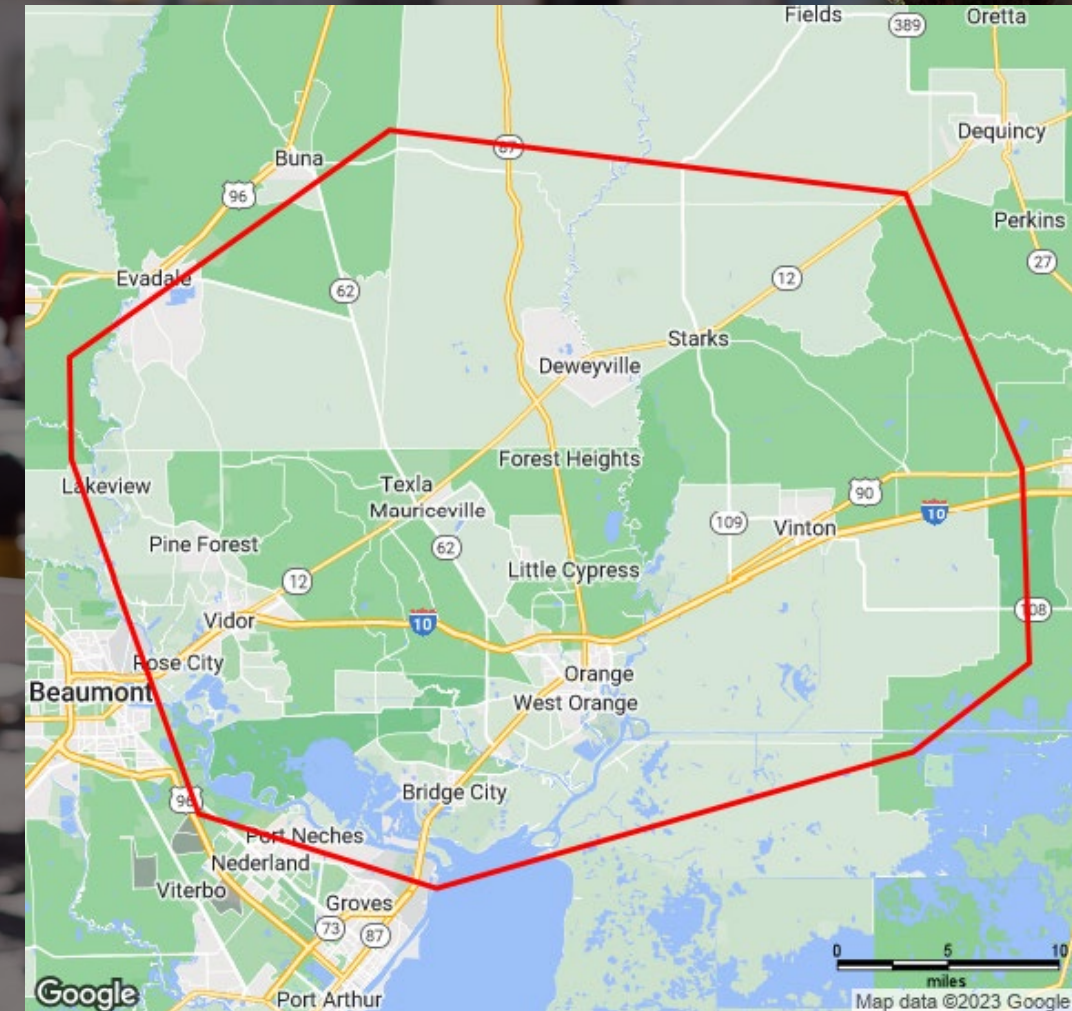
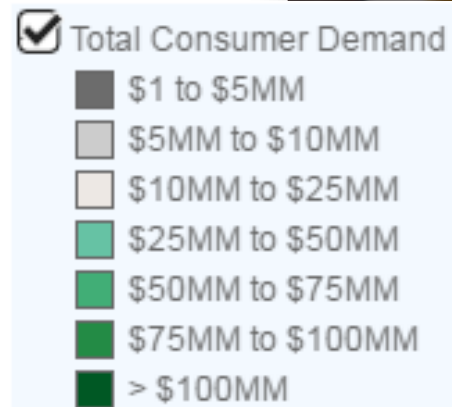


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Total Market Demand

\$1,877,487,940

This represents the amount spent by consumers located in the defined trade area. By block group, the areas with darker green captured more dollars than the gray areas.

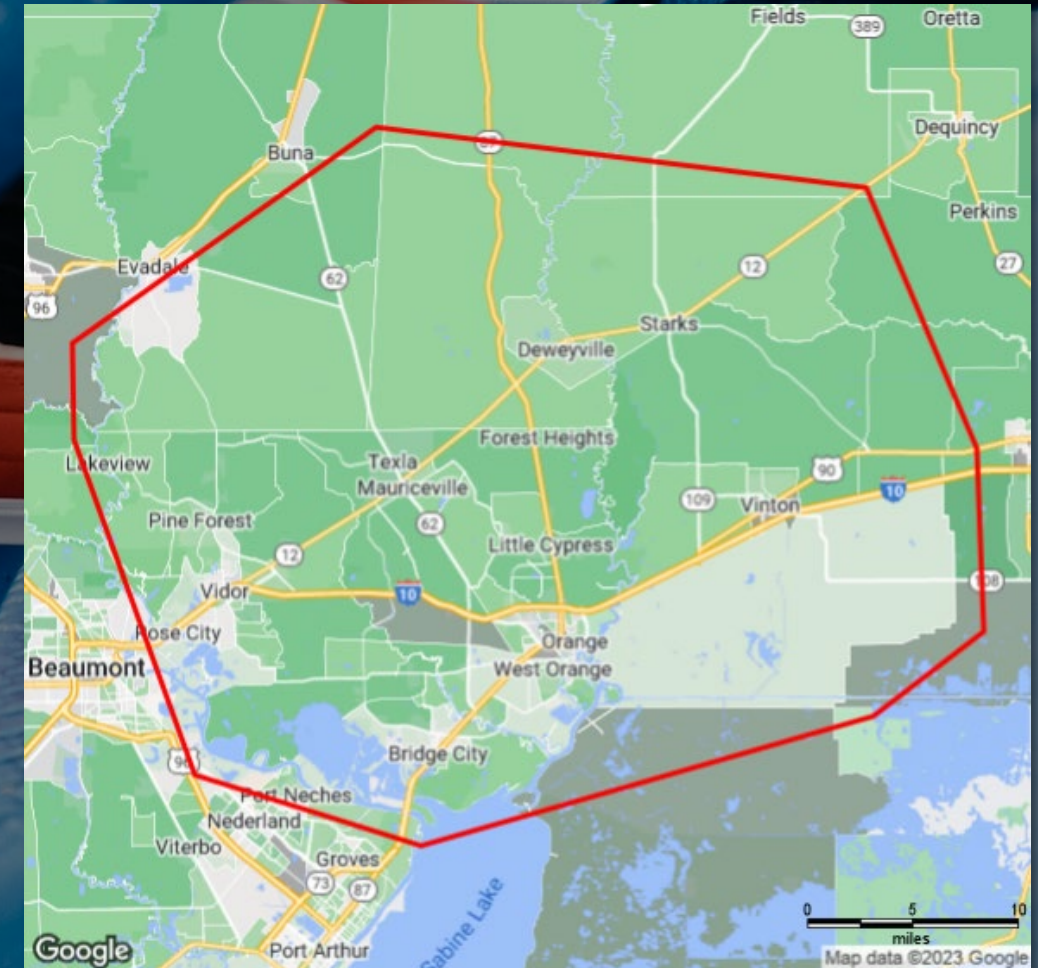


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Opportunity Gap

\$280,456,532

This means more people purchase items outside of the defined Orange County trade area than in the Orange County defined trade area for their consumer goods and services. Finding the specific categories where they are leaving the market is the key. Dark gray shows block groups of retail synergy capturing those dollars. This is where our focus will be to place new retailers and restaurants.



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Consumer Demand & Supply

