

## Retail Market Power (RMP) - Trade Area

Understand supply and demand in a Trade Area through a gap analysis. The report is divided into multiple pages, with both gap and growth pages by both merchandise line and retail store type. A retail opportunity gap appears when expenditure levels for a specific geography are higher than the corresponding retail sales estimates; the demand is greater than supply (i.e. positive value). A retail surplus appears when expenditures are lower than retail sales estimates, where local retailers are attracting expenditures from other areas into their store; demand is less than supply (i.e. negative value). RMP estimates demand in an area for all expenditures from both business and households.



## Retail Market Power® | Demand Growth by Retail Store Types



Trade Area: Santa Barbara County, CA

The Trade Area selected for analysis is indicated at the top of the report.

	2021 Demand (\$)	2026 Demand (\$)	Growth (\$)	Compound Annual Growth Rate (%)
<b>Demand by Store Type</b>				
Total demand for retail trade including food and drink (NAICS 44, 45 and 722)	8,374,941,698	9,583,456,474	1,208,514,775	2.73
Total demand retail trade (NAICS 44 and 45)	7,352,820,539	8,364,848,821	1,012,028,282	2.61
<b>Motor Vehicle and Parts Dealers</b>				
Motor vehicle and parts dealers (NAICS 441)	1,561,651,753	1,846,930,924	285,279,171	3.41
Automobile dealers (NAICS 4411)	1,302,450,246	1,543,628,554	241,178,308	3.46
New car dealers (NAICS 44111)	1,168,744,891	1,384,659,630	215,914,739	3.45
Used car dealers (NAICS 44112)	133,705,354	158,968,924	25,263,570	3.52
Other motor vehicle dealers (NAICS 4412)	132,580,505	162,300,175	29,719,670	4.13
Recreational vehicle dealers (NAICS 44121)	51,783,525	64,149,592	12,366,067	4.38
Motorcycle, boat, and other motor vehicle dealers (NAICS 44122)	80,796,980	98,150,583	17,353,602	3.97
Boat dealers (NAICS 441222)	30,800,977	38,166,203	7,365,226	4.38
Motorcycle, ATV, and all other motor vehicle dealers (NAICS 441228)	49,996,004	59,984,380	9,988,376	3.71
Automotive parts, accessories, and tire stores (NAICS 4413)	126,621,002	141,002,195	14,381,193	2.17
Automotive parts and accessories stores (NAICS 44131)	80,085,790	89,187,229	9,101,440	2.18
Tire dealers (NAICS 44132)	46,535,212	51,814,966	5,279,754	2.17
<b>Furniture and Home Furnishings Stores</b>				

Benchmark: United States

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The Benchmark—also referred to as the base—indicates the geographic extent for the report.

For example, the demand (expenditure) in 2021 for used car dealers is **\$133,705,354** in Santa Barbara County, CA. Demand is projected to increase to **\$158,968,924** by 2026, which difference equals a growth of **\$25,263,570** over the five years. This is also represented by a **3.52%** Compound Annual Growth Rate.

**2021 Demand (\$):** Total dollars spent on the line item in 2021, by all consumers and businesses in the Trade Area, regardless of where the dollars were spent.  
**2026 Demand (\$):** Projected total dollars spent on the line item in 2026, by all consumers and businesses in the Trade Area, regardless of where the dollars were spent.  
**Growth (\$):** (2026 Demand - 2021 Demand) The five-year change in dollars spent on a line item, either a positive or negative value.  
**Compound Annual Growth Rate (%):** The rate at which the demand is projected to grow if it were compounded over the next five years. Alternatively, a representation of growth, had the growth been at a steady rate every year for five years.

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## Retail Market Power® | Opportunity Gap by Merchandise Line Items



Trade Area: Santa Barbara County, CA

The Trade Area selected for analysis.

Demand By Merchandise Line	2021 Demand (\$)	2021 Supply (\$)	Opportunity Gap/Surplus (\$)
Total retail trade including food and drink (NAICS 44, 45 and 722)	8,374,941,698	7,096,274,534	1,278,667,164
Groceries and other food items for human consumption off the premises	1,210,617,513	1,278,752,438	-68,134,925
Outside meals, snacks and catering	946,861,751	1,288,061,922	-341,200,171
Alcoholic beverages served for immediate consumption	125,238,798	144,608,330	-19,369,532
Packaged liquor, wine, and beer	183,062,676	189,609,586	-6,546,910
Cigars, cigarettes, and tobacco and smokers' accessories	73,017,477	89,600,890	-16,583,413
Drugs, health aids and beauty aids, including cosmetics	989,015,304	639,828,664	349,186,640
Household soaps, detergents, cleaners, and cleaning supplies	61,777,895	54,775,549	7,002,346
Paper and related products	66,566,896	52,671,081	13,895,816
Men's wear, including accessories	125,197,369	78,318,182	46,879,187
Women's, juniors', and misses' wear, including accessories	249,431,101	173,533,619	75,897,482
Children's wear	42,837,861	34,015,288	8,822,573
Costumes and unisex clothing	8,983,788	5,804,017	3,179,771
Footwear, including accessories	106,975,783	60,888,590	46,087,193
Sewing, knitting, and needlework goods	12,330,100	6,964,134	5,365,966
Curtains, draperies, blinds, slipcovers, bed and table coverings	55,726,580	39,193,759	16,532,821

Benchmark: United States

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For example there could be a retail opportunity gap for Children's Wear. The demand (expenditure) exceeds the supply (sales), the difference being a positive value. Conversely, there could be a surplus for Packaged liquor, wine, and beer since supply (sales) exceeds demand (expenditure), the difference being a negative value.

**2021 Demand (\$):** Total dollars spent on the line item in 2021, by all consumers and businesses in the Trade Area, regardless of where the dollars were spent.

**2021 Supply (\$):** The total aggregate sales for the line item in the Trade Area.

**Opportunity Gap/Surplus (\$):** (Demand—Supply) The difference between the dollar spent and sales, indicating a gap or surplus of that line item within the Trade Area.