

RETAIL MARKET ANALYSIS

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PREPARED FOR:

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Customer Samples:

Customer samples are derived from cellular location metadata that is sourced from various “apps” on a user's mobile device (phone, tablet, etc). Due to the nature of this information, once enough location data points are available for each device, a high-confidence methodology is employed to derive the locations where each device spends the majority of its time. This could be a residence or, for overnight workers, a business. These high confidence locations are called “common evening locations” and “common daytime locations” and are NOT available for all devices.

Trade Area Delineation:

Trade area delineation is a critical step for a wide array of business activities, including: real estate site selection, estimating store cannibalization, understanding the market's psychographic profile, evaluating and understanding competitors, and developing a media and advertising strategy.

All trade areas are drawn against the boundaries of the US Census block group boundaries. This practice removes the potential for error that occurs when demographic software mathematically computes the demographics of the geography of a divided block group.

This report will define one or two types of trade areas, depending on the specifications in the scope of work:

- Primary Trade Area - captures the closest and densest clustering of 60%-70% of patrons
- Secondary Trade Area - captures the closest and densest clustering of 70% to 85% of patrons.

Demographics:

The demographic report is based on the value of all block groups within the primary trade area, based on the current data provided by ESRI Business Analyst.

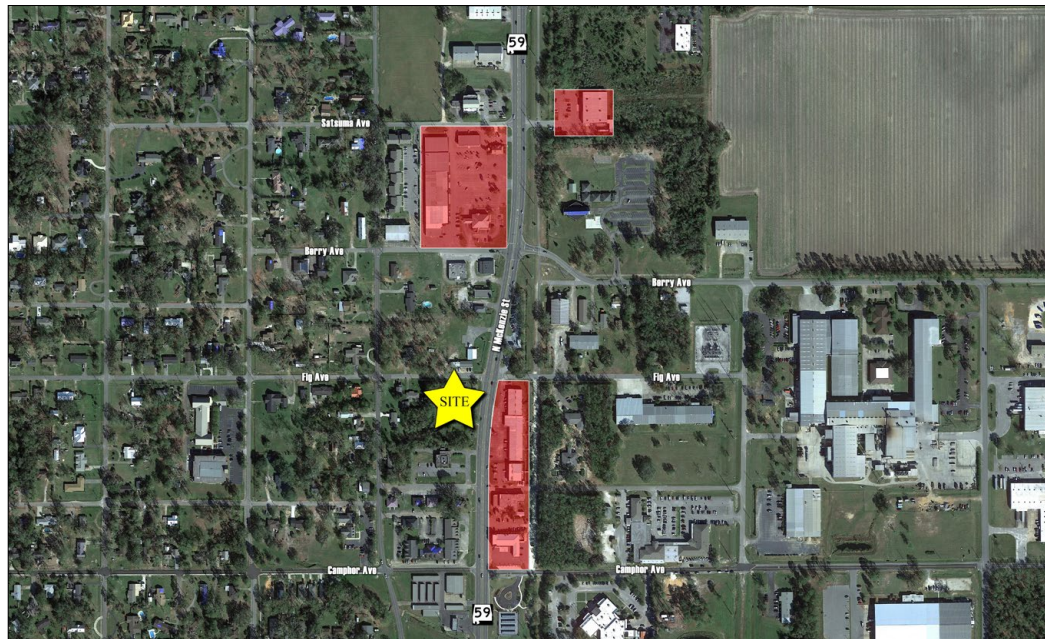
Segmentation Profile:

The segmentation profile is based on the ESRI Tapestry lifestyle segmentation system. A psychographic segment is assigned to every patron, based on the dominant lifestyle segment of the block group of the patron's “common evening location”. Once aggregated, a descriptive snapshot of the customer base can be derived.

Tapestry helps you understand your customers' lifestyle choices, what they buy, and how they spend their free time. Tapestry classifies US residential neighborhoods into 67 unique segments based on demographic and socioeconomic characteristics. That's how you get more insights so you can identify your best customers and underserved markets.



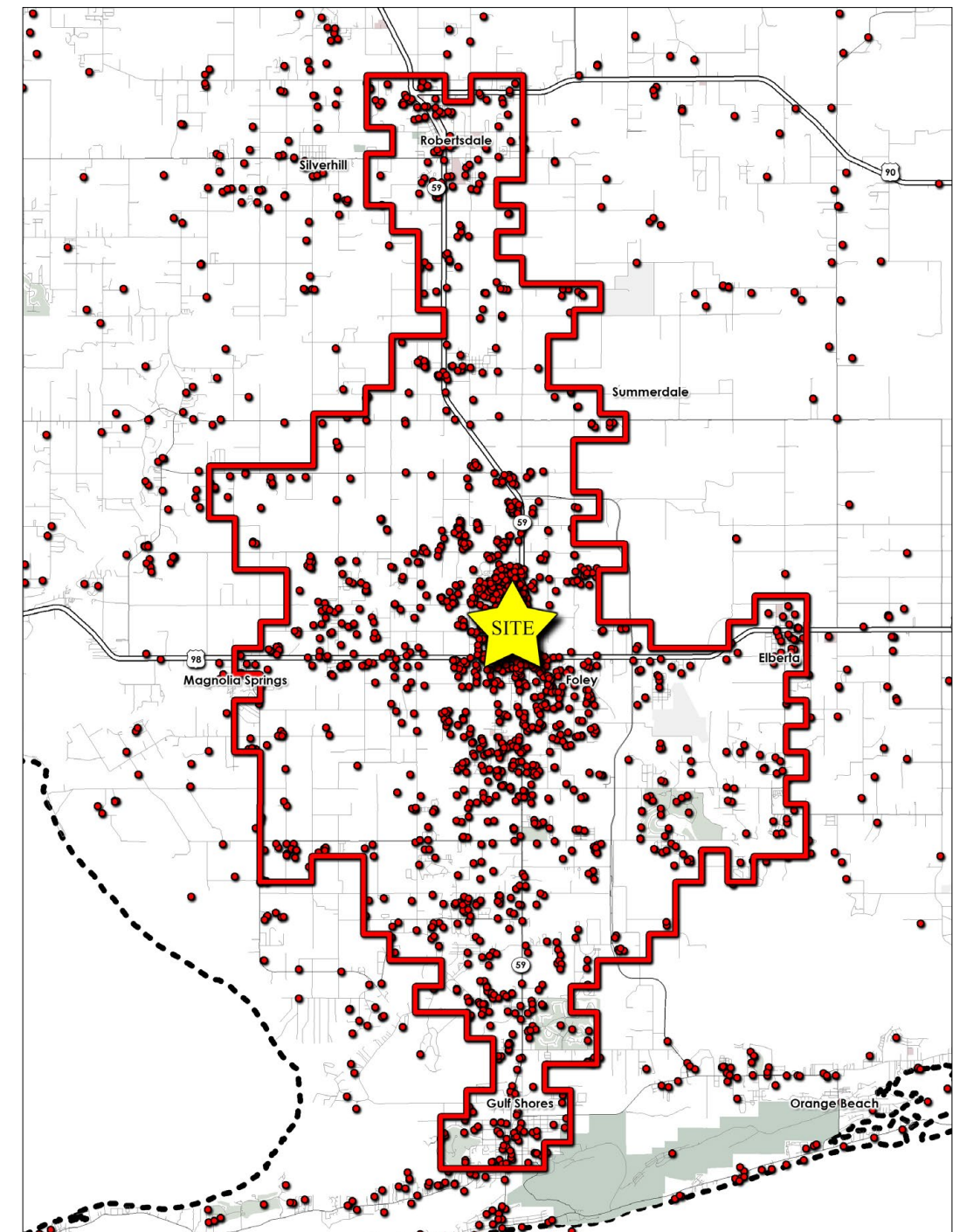
Study Area: Since the subject property is raw land, adjacent retail centers were used as a basis for analysis. The retail areas shown in red (below) were used to identify cellular devices that had visited the study area at least four times during the prior twelve months. The purpose of the multi-visit criteria was to eliminate “tourist” samples.



Customer Segmentation/Demographic Profile: The customer profile of the primary trade area is comprised of solidly middle class households. The spending index below details how each segment spends their money. An index above 100 represents above-average spending (ex, 120 represents spending 20% above average). While the population does spend less than the average American, there are plenty of opportunities for value-oriented retailers.

	Midlife Constants	Southern Satellites	Middleburg	Old and Newcomers	Bright Young Professionals
% of Regional Trade Area	24.8%	16.8%	12.9%	11.8%	5.4%
Housing	85	74	90	78	88
Food	85	80	93	79	90
Apparel & Services	82	76	93	76	89
Transportation	88	84	95	77	88
Health Care	94	85	94	76	80
Entertainment & Recreation	87	79	93	76	85
Education	79	59	83	75	84
Pensions & Security	83	75	94	72	85
Other	88	77	93	75	84

Primary Trade Area: The red outline below is the primary trade area for the adjacent retail, while the red dots represent the patrons we identified that had visited the study area retail at least four times within the prior year. The primary trade area captures 68% of the observed samples. Demographically, the primary trade area contains a population of 56,985 with an average household income of \$72,924.



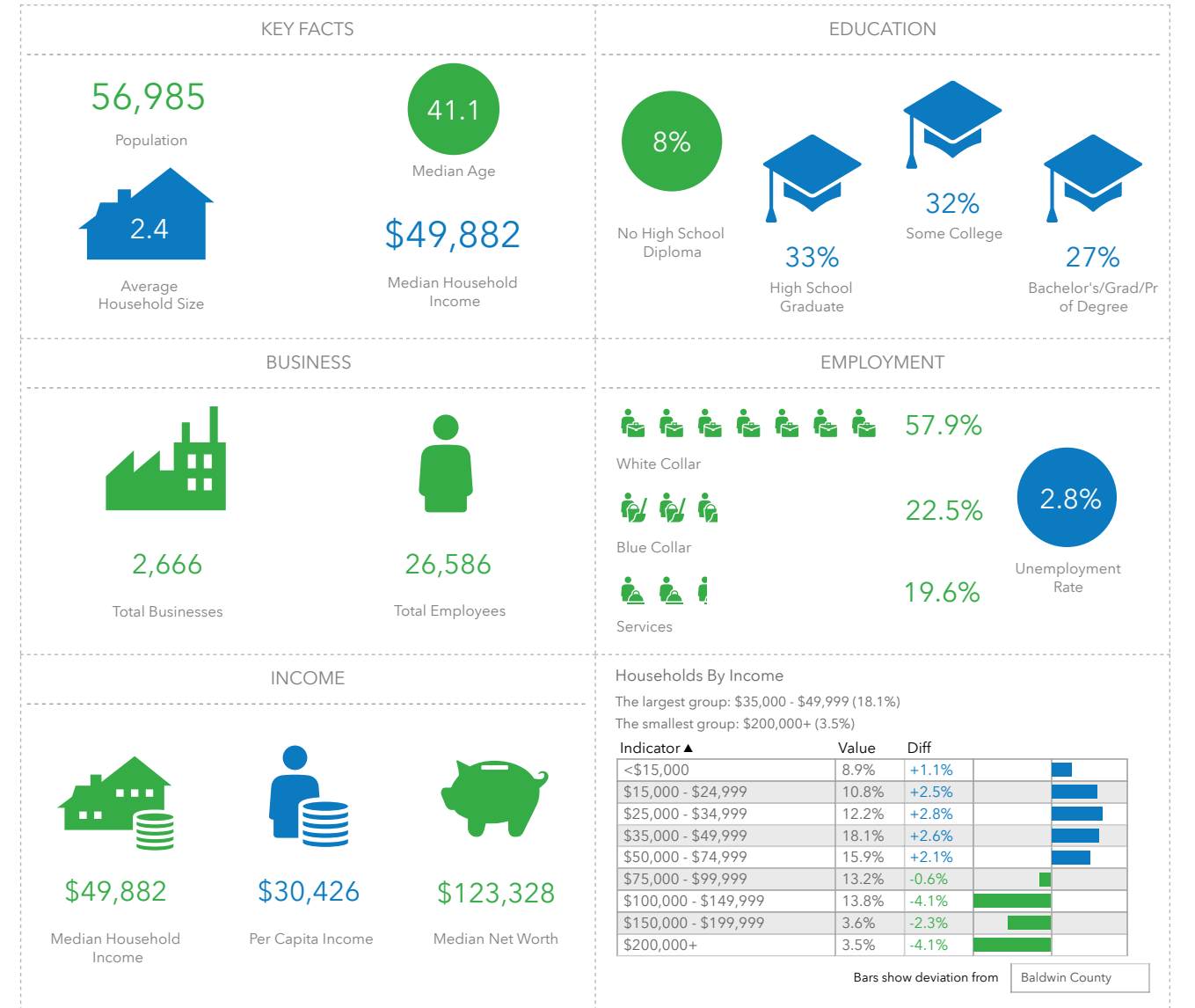
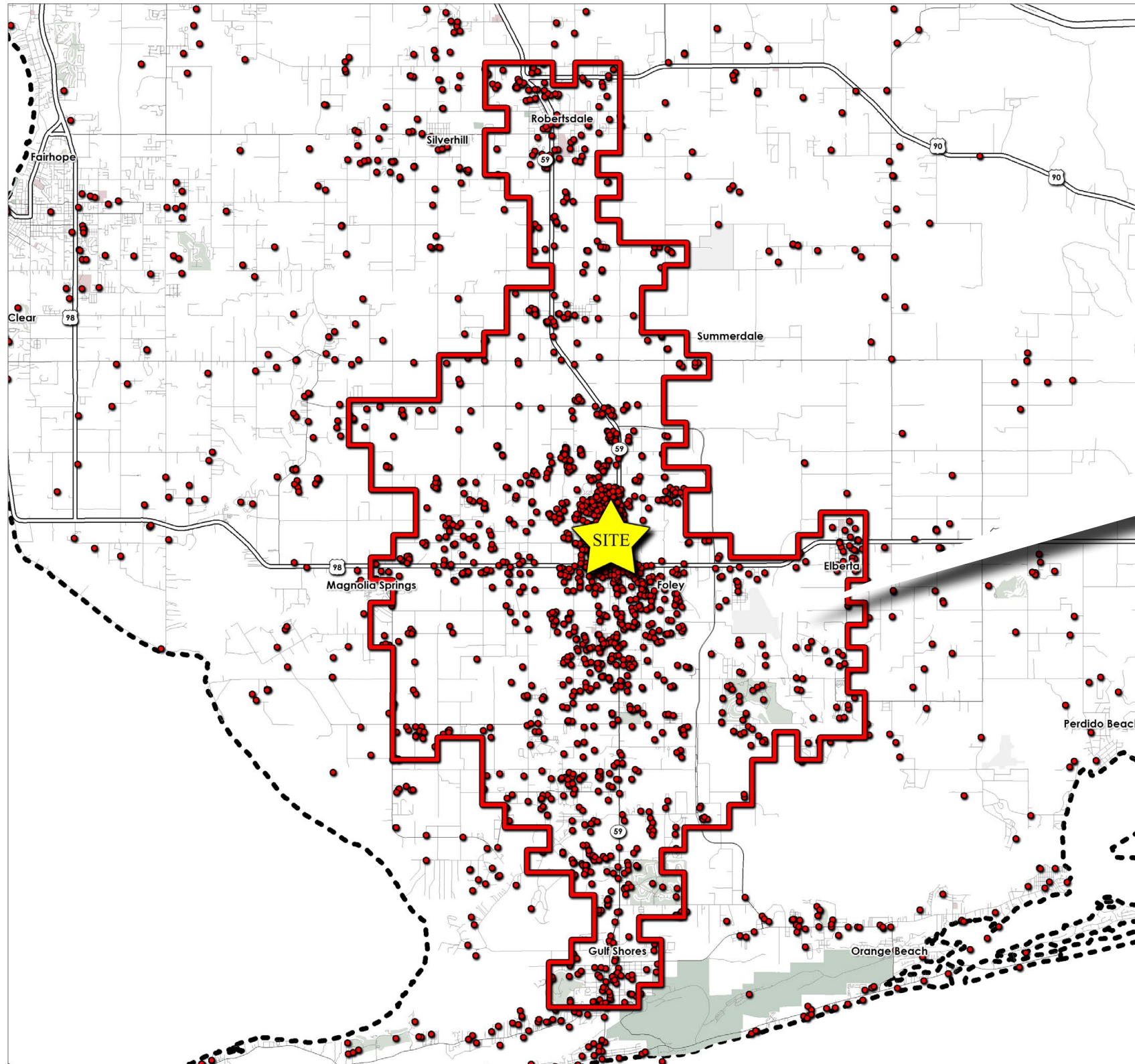
Void Analysis: Based on the retail demand and the customer segmentation/demographic profile, the following retailers should be considered for this development. These are retailers and/or categories that are not within a 5 mile radius.

Please note that this is not an exhaustive list, is not arranged according to priority or rank, and there are other likely tenants that may not be listed:

Casual Restaurants	Fast Casual Restaurants	Quick Service Restaurants	Auto Parts	Pharmacy
Hooters	Another Broken Egg Cafe	Bojangles'	American Lubefast (ALF)	Good Neighbor Pharmacy
Hurricane Grill & Wings	Captain D's Seafood Restaurant	Charley's Philly Steaks	Bumper to Bumper	Health Mart
Logan's Roadhouse	Chipotle Mexican Grill	Church's Chicken	CARQUEST Auto Parts	
Half Shell Oyster House	Clean EatZ	Hungry Howie's Pizza & Subs	Firestone Complete Auto Care	Pets
Olive Garden	Dickey's Barbecue Pit	Jack's Family Restaurants	Precision Tune Auto Care	Fromm Family Pet Food
Taco Mama	Guthrie's	Lenny's Sub Shop	The Hartford Auto Repair Shops	Pet Supermarket
Beef 'O' Brady's	Hot Head Burritos	McAlister's Deli	Truck Hero	Pet Supplies Plus
Sonny's Real Pit Bar-B-Q	Jason's Deli	Pizza Inn		Nutrena
Ruby Tuesday	Lost Pizza Co	Raising Cane's	Banks	Purina Mills
Denny's	Moe's Southwest Grill	Slim Chickens	1st Heritage Credit	Banfield Pet Hospital
Chili's Grill & Bar	Newk's Eatery	Steak 'n Shake	BBVA Compass Bancshares	VIP Petcare
Outback Steakhouse	Panera Bread	VooDoo BBQ & Grill	OneMain Financial	
Miller's Ale House	Taziki's	Wing Zone	SunTrust Bank	
Texas Roadhouse	Tijuana Flats	Wingstop	Whitney Bank	
Village Inn	Zoës Kitchen			
First Watch Restaurants		Gas Stations	Financial	
Carrabba's Italian Grill	Dessert Restaurants	AMBEST	American First Finance	
BJ's Restaurants	Baskin Robbins	Gulf Oil	Check 'n Go	
The Melting Pot Restaurant	Ben & Jerry's	Mobil	Community Choice Financial	
Saltgrass Steak House	Crumbl Cookies	Raceway	Okinus	
Golden Corral	Freddy's Frozen Custard	Stuckey's	Speedy Cash	
Godfather's Pizza	Marble Slab Creamery	Texaco		
IHOP	Nothing Bundt Cakes		Optical	
Maple Street Biscuit Company	Smallcakes	Furniture	EyeCare Associates	
Huddle House	sweetFrog Premium Frozen Yogurt	Mattress Firm	Eyemart Express	
TGI Fridays	Swirl World	Sleep Number	Vision Source	
Bubba Gump Shrimp Co.	Yogurt Mountain			

Trade Area Delineation

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This infographic contains data provided by Esri, Esri-Data Axle. The vintage of the data is 2022, 2027.

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Customer Lifestyle Segmentation

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Segment Name

Midlife Constants	24.8%
Southern Satellites	16.8%
Middleburg	12.9%
Old and Newcomers	11.8%
Bright Young Professionals	5.4%
Other (62 segments)	28.3%

Top Segment Descriptions



MIDLIFE CONSTANTS — Residents are seniors, at or approaching retirement, with below average labor force participation and above average net worth. Although located in predominantly metropolitan areas, they live outside the central cities, in smaller communities. Their lifestyle is more country than urban. They are generous, but not spendthrifts.

Market Profile

- Prefer practical vehicles like SUVs and trucks (domestic, of course).
- Sociable, church-going residents belonging to fraternal orders, veterans' clubs and charitable organizations and do volunteer work and fund-raising.
- Contribute to arts/cultural, educational, health, and social services organizations.
- DIY homebodies that spend on home improvement and gardening.
- Media preferences: country or movie channels.
- Leisure activities include movies at home, reading, fishing, and golf.



SOUTHERN SATELLITES - The second largest market found in rural settlements but within metropolitan areas located primarily in the South. This market is typically nondiverse, slightly older, settled married-couple families, who own their homes. Two-thirds of the homes are single-family structures; almost a third are mobile homes. Median household income and home value are below average. Workers are employed in a variety of industries, such as manufacturing, health care, retail trade, and construction, with higher proportions in mining and agriculture than the US. Residents enjoy country living, preferring outdoor activities and DIY home projects.

Market Profile

- Usually own a truck; likely to service it themselves.
- Frequent the convenience store, usually to fill up a vehicle with gas.
- Typical household has a satellite dish.
- Work on home improvement and remodeling projects.
- Own a pet, commonly a dog.
- Participate in fishing and hunting.
- Prefer to listen to country music and watch Country Music Television (CMT).
- Read fishing/hunting and home service magazines.
- Partial to eating at low-cost family restaurants and drive-ins.
- Use Walmart for all their shopping needs (groceries, clothing, pharmacy, etc.).

Segment Name

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Top Segment Descriptions



MIDDLEBURG - Neighborhoods transformed from the easy pace of country living to semirural subdivisions in the last decade, when the housing boom reached out. Residents are conservative, family-oriented consumers. Still more country than rock and roll, they are thrifty but willing to carry some debt and are already investing in their futures. They rely on their smartphones and mobile devices to stay in touch and pride themselves on their expertise. They prefer to buy American and travel in the US. This market is younger but growing in size and assets.

Market Profile

- Residents are partial to domestic vehicles; they like to drive trucks, SUVs, or motorcycles.
- Entertainment is primarily family-oriented, TV and movie rentals or theme parks and family restaurants.
- Spending priorities also focus on family (children's toys and apparel) or home DIY projects.
- Sports include hunting, fishing, bowling, and baseball.
- TV and magazines provide entertainment and information.
- Media preferences include country and Christian channels.



OLD AND NEWCOMERS - This market features singles' lifestyles, on a budget. The focus is more on convenience than consumerism, economy over acquisition. Old and Newcomers is composed of neighborhoods in transition, populated by renters who are just beginning their careers or retiring. Some are still in college; some are taking adult education classes. They support charity causes and are environmentally conscious. Age is not always obvious from their choices.

Market Profile

- Residents have a strong sense of community. They volunteer for charities, help fundraise, and recycle.
- They prefer cell phones to landlines.
- Entertainment features the internet (employment searches, rating products, updating social media profiles), watching movies at home, listening to country music, and reading the paper.
- Vehicles are basically just a means of transportation.
- Food features convenience, frozen, and fast food.
- They do banking as likely in person as online.

Segment Name

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Top Segment Descriptions



Bright Young Professionals is a large market, primarily located in urban outskirts of large metropolitan areas. These communities are home to young, educated, working professionals. More than one out of three householders is under the age of 35. Slightly more diverse couples dominate this market, with more renters than homeowners. More than two-fifths of the households live in single-family homes; over a third live in 5+ unit buildings. Labor force participation is high, generally white-collar work, with a mix of food service and part-time jobs (among the college students). Median household income, median home value, and average rent are close to the US values. Residents of this segment are physically active and up on the latest technology. http://downloads.esri.com/esri_content_doc/dbl/us/tapestry/8C_BrightYoung_TapestryFlier_G79488_2-18.pdf

MARKET PROFILE

- Own retirement savings and student loans.
- Own newer computers (desktop, laptop, or both), iPods, and 2+ TVs.
- Go online and use mobile devices for banking, access YouTube or Facebook, visit blogs, download movies, and play games.
- Use cell phones to text, redeem mobile coupons, listen to music, and check for news and financial information.
- Find leisure going to bars/clubs, attending concerts, going to the beach, and renting DVDs from Redbox or Netflix.
- Enjoy a variety of sports, including backpacking, rock climbing, football, Pilates, running, and yoga.
- Eat out often at fast-food and family restaurants.

Retail Reports

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Retail Market Potential

Prepared by Esri

Demographic Summary	2022	2027
Population	56,985	60,967
Population 18+	44,809	47,768
Households	23,881	25,636
Median Household Income	\$49,882	\$58,279

Product/Consumer Behavior	Expected Number of Adults or HHs	Percent of Adults/HHs	MPI
Apparel (Adults)			
Bought any men's clothing in last 12 months	24,543	54.8%	100
Bought any women's clothing in last 12 months	22,261	49.7%	102
Bought any shoes in last 12 months	32,120	71.7%	99
Bought any fine jewelry in last 12 months	8,410	18.8%	98
Bought a watch in last 12 months	6,281	14.0%	98
Automobiles (Households)			
HH owns/leases any vehicle	21,870	91.6%	102
HH bought/leased new vehicle last 12 months	2,055	8.6%	90
Automotive Aftermarket (Adults)			
Bought gasoline in last 6 months	40,756	91.0%	103
Bought/changed motor oil in last 12 months	23,634	52.7%	110
Had tune-up in last 12 months	10,767	24.0%	98
Beverages (Adults)			
Drank non-diet (regular) in last 6 months	18,391	41.0%	104
Drank beer/ale in last 6 months	17,461	39.0%	96
Cameras (Adults)			
Own digital point & shoot camera/camcorder	4,139	9.2%	94
Own digital SLR camera/camcorder	3,796	8.5%	87
Printed digital photos in last 12 months	10,900	24.3%	96
Cell Phones (Adults/Households)			
Bought cell phone in last 12 months	14,715	32.8%	101
Have a smartphone	40,864	91.2%	99
Have a smartphone: Android phone (any brand)	19,840	44.3%	111
Have a smartphone: Apple iPhone	21,162	47.2%	90
Number of cell phones in household: 1	7,906	33.1%	108
Number of cell phones in household: 2	9,174	38.4%	100
Number of cell phones in household: 3+	6,258	26.2%	90
HH has cell phone only (no landline telephone)	16,449	68.9%	103
Computers (Households)			
HH owns a computer	18,717	78.4%	96
HH owns desktop computer	8,522	35.7%	94
HH owns laptop/notebook	15,209	63.7%	97
HH owns any Apple/Mac brand computer	4,101	17.2%	77
HH owns any PC/non-Apple brand computer	16,079	67.3%	101
HH purchased most recent computer in a store	8,719	36.5%	99
HH purchased most recent computer online	4,973	20.8%	92
HH spent \$1-\$499 on most recent home computer	3,976	16.6%	107
HH spent \$500-\$999 on most recent home computer	4,600	19.3%	102
HH spent \$1,000-\$1,499 on most recent home computer	2,421	10.1%	84
HH spent \$1,500-\$1,999 on most recent home computer	919	3.8%	73
HH spent \$2,000+ on most recent home computer	825	3.5%	73

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by MRI-Simmons in a nationally representative survey of U.S. households. Esri forecasts for 2022 and 2027.



Retail Market Potential

Prepared by Esri

Product/Consumer Behavior	Expected Number of Adults or HHs	Percent of Adults/HHs	MPI
Convenience Stores (Adults)			
Shopped at convenience store in last 6 months	29,632	66.1%	105
Bought brewed coffee at convenience store in last 30 days	5,692	12.7%	102
Bought cigarettes at convenience store in last 30 days	4,456	9.9%	139
Bought gas at convenience store in last 30 days	19,561	43.7%	116
Spent at convenience store in last 30 days: \$1-19	3,462	7.7%	102
Spent at convenience store in last 30 days: \$20-\$39	4,286	9.6%	93
Spent at convenience store in last 30 days: \$40-\$50	4,199	9.4%	110
Spent at convenience store in last 30 days: \$51-\$99	3,062	6.8%	113
Spent at convenience store in last 30 days: \$100+	10,698	23.9%	117
Entertainment (Adults)			
Attended a movie in last 6 months	19,996	44.6%	93
Went to live theater in last 12 months	3,389	7.6%	75
Went to a bar/night club in last 12 months	7,013	15.7%	92
Dined out in last 12 months	22,863	51.0%	101
Gambled at a casino in last 12 months	4,457	9.9%	87
Visited a theme park in last 12 months	5,405	12.1%	84
Viewed movie (video-on-demand) in last 30 days	4,641	10.4%	80
Viewed TV show (video-on-demand) in last 30 days	3,134	7.0%	83
Watched any pay-per-view TV in last 12 months	2,450	5.5%	85
Downloaded a movie over the Internet in last 30 days	2,941	6.6%	86
Downloaded any individual song in last 6 months	8,475	18.9%	96
Used internet to watch a movie online in last 30 days	13,891	31.0%	91
Used internet to watch a TV program online in last 30 days	8,754	19.5%	89
Played a video/electronic game (console) in last 12 months	5,248	11.7%	100
Played a video/electronic game (portable) in last 12 months	2,392	5.3%	89
Financial (Adults)			
Have home mortgage (1st)	15,973	35.6%	99
Used ATM/cash machine in last 12 months	26,210	58.5%	97
Own any stock	4,642	10.4%	86
Own U.S. savings bond	2,667	6.0%	96
Own shares in mutual fund (stock)	4,329	9.7%	87
Own shares in mutual fund (bonds)	2,944	6.6%	93
Have interest checking account	15,915	35.5%	100
Have non-interest checking account	16,393	36.6%	103
Have savings account	30,747	68.6%	100
Have 401K retirement savings plan	9,548	21.3%	98
Own/used any credit/debit card in last 12 months	39,645	88.5%	100
Avg monthly credit card expenditures: \$1-110	5,835	13.0%	109
Avg monthly credit card expenditures: \$111-\$225	3,496	7.8%	99
Avg monthly credit card expenditures: \$226-\$450	3,602	8.0%	91
Avg monthly credit card expenditures: \$451-\$700	3,610	8.1%	100
Avg monthly credit card expenditures: \$701-\$1,000	3,401	7.6%	101
Avg monthly credit card expenditures: \$1001-2000	3,709	8.3%	83
Avg monthly credit card expenditures: \$2001+	3,053	6.8%	77
Did banking online in last 12 months	23,280	52.0%	98
Did banking on mobile device in last 12 months	18,038	40.3%	96

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by MRI-Simmons in a nationally representative survey of U.S. households. Esri forecasts for 2022 and 2027.



Retail Market Potential

Prepared by Esri

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent of Adults/HHs	MPI
Grocery (Adults)			
HH used bread in last 6 months	22,690	95.0%	101
HH used chicken (fresh or frozen) in last 6 months	16,053	67.2%	98
HH used turkey (fresh or frozen) in last 6 months	3,487	14.6%	101
HH used fish/seafood (fresh or frozen) in last 6 months	13,070	54.7%	94
HH used fresh fruit/vegetables in last 6 months	20,650	86.5%	99
HH used fresh milk in last 6 months	20,119	84.2%	101
HH used organic food in last 6 months	4,541	19.0%	76
Health (Adults)			
Exercise at home 2+ times per week	17,435	38.9%	96
Exercise at club 2+ times per week	5,096	11.4%	83
Visited a doctor in last 12 months	35,890	80.1%	101
Used vitamin/dietary supplement in last 6 months	26,428	59.0%	97
Home (Households)			
HH did any home improvement in last 12 months	8,389	35.1%	103
HH used any maid/professional cleaning service in last 12 months	4,258	17.8%	87
HH purchased low ticket HH furnishings in last 12 months	5,269	22.1%	102
HH purchased big ticket HH furnishings in last 12 months	6,306	26.4%	101
HH bought any small kitchen appliance in last 12 months	6,049	25.3%	100
HH bought any large kitchen appliance in last 12 months	3,752	15.7%	101
Insurance (Adults/Households)			
Currently carry life insurance	22,403	50.0%	103
Carry medical/hospital/accident insurance	36,560	81.6%	101
Carry homeowner/personal property insurance	26,701	59.6%	105
Carry renter's insurance	4,639	10.4%	97
HH has auto insurance: 1 vehicle in household covered	7,425	31.1%	106
HH has auto insurance: 2 vehicles in household covered	7,381	30.9%	100
HH has auto insurance: 3+ vehicles in household covered	6,126	25.7%	103
Pets (Households)			
Household owns any pet	13,691	57.3%	109
Household owns any cat	6,300	26.4%	115
Household owns any dog	10,412	43.6%	110
Psychographics (Adults)			
Represents adults who "completely agree" with the statement:			
Buying American is important	18,307	40.9%	115
Buy based on quality not price	7,388	16.5%	96
Buy on credit rather than wait	5,716	12.8%	97
Only use coupons brands: usually buy	6,304	14.1%	103
Will pay more for environmentally safe products	5,372	12.0%	88
Buy based on price not brands	13,426	30.0%	104
Am interested in how to help the environment	8,219	18.3%	90
Reading (Adults)			
Bought digital book in last 12 months	7,374	16.5%	95
Bought hardcover book in last 12 months	11,067	24.7%	101
Bought paperback book in last 12 months	13,582	30.3%	97
Read any daily newspaper (paper version)	6,377	14.2%	92
Read any digital newspaper in last 30 days	19,035	42.5%	86
Read any magazine (paper/electronic version) in last 6 months	39,019	87.1%	98

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Product/Consumer Behavior	Expected Number of Adults or HHs	Percent of Adults/HHs	MPI
Restaurants (Adults)			
Went to family restaurant/steak house in last 6 months	31,020	69.2%	103
Went to family restaurant/steak house: 4+ times a month	10,236	22.8%	110
Went to fast food/drive-in restaurant in last 6 months	41,127	91.8%	101
Went to fast food/drive-in restaurant 9+ times/month	17,519	39.1%	103
Fast food restaurant last 6 months: eat in	11,369	25.4%	112
Fast food restaurant last 6 months: home delivery	4,243	9.5%	82
Fast food restaurant last 6 months: take-out/drive-thru	27,156	60.6%	108
Fast food restaurant last 6 months: take-out/walk-in	8,240	18.4%	86
Television & Electronics (Adults/Households)			
Own any tablet	24,606	54.9%	98
Own any e-reader	5,041	11.2%	92
Own e-reader/tablet: iPad	13,590	30.3%	87
HH has Internet connectable TV	10,092	42.3%	99
Own any portable MP3 player	5,738	12.8%	94
HH owns 1 TV	4,768	20.0%	102
HH owns 2 TVs	6,875	28.8%	105
HH owns 3 TVs	5,118	21.4%	97
HH owns 4+ TVs	4,733	19.8%	95
HH subscribes to cable TV	8,475	35.5%	95
HH subscribes to fiber optic	786	3.3%	61
HH owns portable GPS navigation device	5,200	21.8%	106
HH purchased video game system in last 12 months	1,337	5.6%	72
HH owns any Internet video device for TV	10,331	43.3%	95
Travel (Adults)			
Took domestic trip in continental US last 12 months	23,236	51.9%	97
Took 3+ domestic non-business trips in last 12 months	5,451	12.2%	97
Spent on domestic vacations in last 12 months: \$1-999	5,708	12.7%	102
Spent on domestic vacations in last 12 months: \$1,000-\$1,499	2,462	5.5%	88
Spent on domestic vacations in last 12 months: \$1,500-\$1,999	1,678	3.7%	99
Spent on domestic vacations in last 12 months: \$2,000-\$2,999	1,764	3.9%	105
Spent on domestic vacations in last 12 months: \$3,000+	2,362	5.3%	82
Domestic travel in last 12 months: used general travel website	2,336	5.2%	88
Took foreign trip (including Alaska and Hawaii) in last 3 years	11,892	26.5%	80
Took 3+ foreign trips by plane in last 3 years	2,308	5.2%	65
Spent on foreign vacations in last 12 months: \$1-999	2,668	6.0%	82
Spent on foreign vacations in last 12 months: \$1,000-\$2,999	1,200	2.7%	70
Spent on foreign vacations in last 12 months: \$3,000+	1,846	4.1%	68
Foreign travel in last 3 years: used general travel website	2,111	4.7%	72
Nights spent in hotel/motel in last 12 months: any	20,052	44.7%	99
Took cruise of more than one day in last 3 years	4,490	10.0%	93
Member of any frequent flyer program	8,688	19.4%	78
Member of any hotel rewards program	10,644	23.8%	92

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Retail Demand Outlook

Prepared by Esri

Top Tapestry Segments	Percent	Demographic Summary	2022	2027
Midlife Constants (5E)	23.8%	Population	56,985	60,967
Southern Satellites (10A)	20.0%	Households	23,881	25,636
Middleburg (4C)	17.1%	Families	15,741	16,822
Old and Newcomers (8F)	14.5%	Median Age	41.1	41.8
Bright Young Professionals (8C)	9.6%	Median Household Income	\$49,882	\$58,279

	2022	2027	Projected
	Consumer Spending	Forecasted Demand	Spending Growth
Apparel and Services	\$40,217,614	\$49,495,753	\$9,278,139
Men's	\$7,618,926	\$9,375,273	\$1,756,347
Women's	\$14,162,939	\$17,430,732	\$3,267,793
Children's	\$5,926,019	\$7,293,101	\$1,367,082
Footwear	\$9,417,656	\$11,590,391	\$2,172,735
Watches & Jewelry	\$2,463,417	\$3,032,582	\$569,165
Apparel Products and Services (1)	\$950,094	\$1,169,305	\$219,211
Computer			
Computers and Hardware for Home Use	\$3,090,963	\$3,803,234	\$712,271
Portable Memory	\$83,173	\$102,358	\$19,185
Computer Software	\$169,417	\$208,398	\$38,981
Computer Accessories	\$354,601	\$436,243	\$81,642
Entertainment & Recreation	\$62,815,673	\$77,318,883	\$14,503,210
Fees and Admissions	\$13,110,496	\$16,127,854	\$3,017,358
Membership Fees for Clubs (2)	\$4,497,274	\$5,532,764	\$1,035,490
Fees for Participant Sports, excl. Trips	\$2,130,144	\$2,620,105	\$489,961
Tickets to Theatre/Operas/Concerts	\$1,402,498	\$1,725,535	\$323,037
Tickets to Movies	\$1,013,547	\$1,246,554	\$233,007
Tickets to Parks or Museums	\$637,651	\$784,635	\$146,984
Admission to Sporting Events, excl. Trips	\$1,163,864	\$1,432,000	\$268,136
Fees for Recreational Lessons	\$2,245,098	\$2,761,128	\$516,030
Dating Services	\$20,420	\$25,134	\$4,714
TV/Video/Audio	\$23,567,798	\$29,014,712	\$5,446,914
Cable and Satellite Television Services	\$16,385,714	\$20,177,385	\$3,791,671
Televisions	\$2,203,049	\$2,710,927	\$507,878
Satellite Dishes	\$32,345	\$39,780	\$7,435
VCRs, Video Cameras, and DVD Players	\$95,438	\$117,445	\$22,007
Miscellaneous Video Equipment	\$299,837	\$369,119	\$69,282
Video Cassettes and DVDs	\$151,672	\$186,581	\$34,909
Video Game Hardware/Accessories	\$567,820	\$698,769	\$130,949
Video Game Software	\$320,253	\$394,011	\$73,758
Rental/Streaming/Downloaded Video	\$1,399,231	\$1,721,286	\$322,055
Installation of Televisions	\$11,400	\$14,006	\$2,606
Audio (3)	\$2,036,914	\$2,506,341	\$469,427
Rental and Repair of TV/Radio/Sound Equipment	\$64,127	\$79,062	\$14,935
Pets	\$14,801,896	\$18,226,398	\$3,424,502
Toys/Games/Crafts/Hobbies (4)	\$2,283,865	\$2,810,280	\$526,415
Recreational Vehicles and Fees (5)	\$2,160,907	\$2,661,107	\$500,200
Sports/Recreation/Exercise Equipment (6)	\$3,612,900	\$4,445,807	\$832,907
Photo Equipment and Supplies (7)	\$853,790	\$1,050,237	\$196,447
Reading (8)	\$1,938,436	\$2,385,048	\$446,612
Catered Affairs (9)	\$489,149	\$601,818	\$112,669
Food	\$177,839,263	\$218,893,358	\$41,054,095
Food at Home	\$105,612,547	\$130,001,098	\$24,388,551
Bakery and Cereal Products	\$13,528,973	\$16,653,941	\$3,124,968
Meats, Poultry, Fish, and Eggs	\$22,847,129	\$28,126,586	\$5,279,457
Dairy Products	\$10,449,583	\$12,861,608	\$2,412,025
Fruits and Vegetables	\$20,047,491	\$24,674,067	\$4,626,576
Snacks and Other Food at Home (10)	\$38,739,370	\$47,684,897	\$8,945,527
Food Away from Home	\$72,226,716	\$88,892,260	\$16,665,544
Alcoholic Beverages	\$11,585,534	\$14,257,422	\$2,671,888

Data Note: The Consumer Spending data is household-based and represents the amount spent for a product or service by all households in an area. Detail may not sum to totals due to rounding. This report is not a comprehensive list of all consumer spending variables therefore the variables in each section may not sum to totals.
Source: Esri forecasts for 2022 and 2027; Consumer Spending data are derived from the 2018 and 2019 Consumer Expenditure Surveys, Bureau of Labor Statistics.



Retail Demand Outlook

Prepared by Esri

	2022	2027	Projected
	Consumer Spending	Forecasted Demand	Spending Growth
Financial			
Value of Stocks/Bonds/Mutual Funds	\$514,566,384	\$632,996,929	\$118,430,545
Value of Retirement Plans	\$1,874,369,432	\$2,306,411,745	\$432,042,313
Value of Other Financial Assets	\$163,623,617	\$201,413,993	\$37,790,376
Vehicle Loan Amount excluding Interest	\$60,275,441	\$74,200,249	\$13,924,808
Value of Credit Card Debt	\$53,100,926	\$65,355,794	\$12,254,868
Health			
Nonprescription Drugs	\$3,272,087	\$4,029,191	\$757,104
Prescription Drugs	\$7,313,039	\$9,007,409	\$1,694,370
Eyeglasses and Contact Lenses	\$1,890,311	\$2,326,819	\$436,508
Home			
Mortgage Payment and Basics (11)	\$196,291,467	\$241,572,482	\$45,281,015
Maintenance and Remodeling Services	\$54,483,150	\$67,053,542	\$12,570,392
Maintenance and Remodeling Materials (12)	\$12,541,431	\$15,441,959	\$2,900,528
Utilities, Fuel, and Public Services	\$100,005,423	\$123,122,261	\$23,116,838
Household Furnishings and Equipment			
Household Textiles (13)	\$1,925,945	\$2,370,252	\$444,307
Furniture	\$12,450,210	\$15,323,316	\$2,873,106
Rugs	\$613,201	\$754,865	\$141,664
Major Appliances (14)	\$7,557,956	\$9,303,104	\$1,745,148
Housewares (15)	\$1,704,081	\$2,097,061	\$392,980
Small Appliances	\$1,013,161	\$1,246,777	\$233,616
Luggage	\$318,613	\$392,051	\$73,438
Telephones and Accessories	\$1,768,251	\$2,175,476	\$407,225
Household Operations			
Child Care	\$9,392,247	\$11,553,892	\$2,161,645
Lawn and Garden (16)	\$10,256,255	\$12,629,532	\$2,373,277
Moving/Storage/Freight Express	\$1,368,843	\$1,683,820	\$314,977
Housekeeping Supplies (17)	\$15,502,023	\$19,083,531	\$3,581,508
Insurance			
Owners and Renters Insurance	\$13,184,349	\$16,235,770	\$3,051,421
Vehicle Insurance	\$37,635,440	\$46,330,883	\$8,695,443
Life/Other Insurance	\$12,044,810	\$14,830,140	\$2,785,330
Health Insurance	\$83,703,592	\$103,052,873	\$19,349,281
Personal Care Products (18)	\$9,632,398	\$11,855,790	\$2,223,392
School Books and Supplies (19)	\$2,493,138	\$3,068,196	\$575,058
Smoking Products	\$8,381,178	\$10,323,973	\$1,942,795
Transportation			
Payments on Vehicles excluding Leases	\$54,436,848	\$67,021,413	\$12,584,565
Gasoline and Motor Oil	\$48,194,561	\$59,332,394	\$11,137,833
Vehicle Maintenance and Repairs	\$22,232,443	\$27,363,956	\$5,131,513
Travel			
Airline Fares	\$11,118,890	\$13,677,461	\$2,558,571
Lodging on Trips	\$13,357,681	\$16,439,566	\$3,081,885
Auto/Truck Rental on Trips	\$1,009,180	\$1,241,450	\$232,270
Food and Drink on Trips	\$11,213,843	\$13,799,503	\$2,585,660

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