



GEORGE WASHINGTON
CARVER SHOPPING CENTER
FEASIBILITY STUDY





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EXECUTIVE SUMMARY

Note that demographic, economic, and spending data is reported throughout this report in terms of a 1-mile, 5-mile, or 10-mile radius from the George Washington Carver Shopping Center.

Key Recommendations

As stakeholders continue the work of enhancing the George Washington Carver Shopping Center, the following strategies have potential to drive high quality future investment and accelerate the shopping center's redevelopment:

Attract uses that are both fiscally productive and in service of the goals of community stakeholders. Fiscally productive properties are those that have improvements to raise the property value and/or are occupied in business with revenue subject to sales tax. Uses for the properties that enrich or provide a service for the community surrounding the shopping center are ideal.

Fill vacancies with retailers, restaurants, or professional services that meet the excess demand needs of nearby residents. Example retailers include caterers, variety or dollar stores, or thrift or consignment shops. Other possible uses include religious services, professional offices, or community centers.

Engage in and promote façade and parking lot improvements, such as updated lighting, building upgrades, and repaving as necessary. Updated lighting, building upgrades, and paving and sidewalk improvements attract potential users and customers and reduce crime and blight.

SHOPPING CENTER ANALYSIS

Surrounding Area

The George Washington Carver Shopping Center is located at the intersection of Gaskin Avenue and College Park Drive in Douglas, Georgia, near the historic campus of the Carver School, which once was a school for grades 1 through 12. The Carver School is now known as the George Washington Carver Freshman Campus and houses all ninth grade students in Coffee County. In addition to the George Washington Carver Freshman Campus, the Gaskin Avenue corridor contains lower-income residential areas and the Willie Mae Roundtree Recreation Area and Roundtree Center Park. To the south and west of the shopping center are several retailers such as It's Fashion Metro, Tractor Supply Co., The UPS Store, Belk, Bealls Outlet, O'Reilly Auto Parts, Family Dollar, and AT&T. In addition, there are multiple fast food restaurants such as McDonald's, Arby's, Burger King, Krystal, Taco Bell, Chick-fil-A, Hardee's, Checkers, Zaxby's, Dairy Queen, Firehouse Subs, and Wendy's, and other restaurants like Tokyo Express Japanese Steakhouse & Seafood, Ruby Tuesday, El 1800 Mexican, Huddle House, Kobe Japanese Hibachi & Sushi, and Peking House. The neighborhood is less than a mile away from two grocery stores, Harveys Supermarket and Save A Lot.



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Walkability and Bikeability

Walk Score is a proprietary measure of how walkable an address is to nearby amenities. Similarly, Bike Score measures whether an area is good for biking based on bike lanes and trails, hills, road connectivity, and destinations. The Walk Score of the George Washington Carver Shopping Center is 50, which corresponds to a description of Somewhat Walkable, meaning that some errands can be accomplished on foot. The Bike Score of the shopping center is 40, which corresponds to Somewhat Bikeable, meaning there is minimal bike infrastructure.

Figure 1. Walk Score.

Walk Score	Description
90–100	Walker’s Paradise Daily errands do not require a car.
70–89	Very Walkable Most errands can be accomplished on foot.
50–69	Somewhat Walkable Some errands can be accomplished on foot.
25–49	Car-Dependent Most errands require a car.
0–24	Car-Dependent Almost all errands require a car.



Figure 2. Bike Score.

Bike Score	Description
90–100	Biker’s Paradise Daily errands can be accomplished on a bike
70–89	Very Bikeable Biking is convenient for most trips
50–69	Bikeable Some bike infrastructure
0–49	Somewhat Bikeable Minimal bike infrastructure



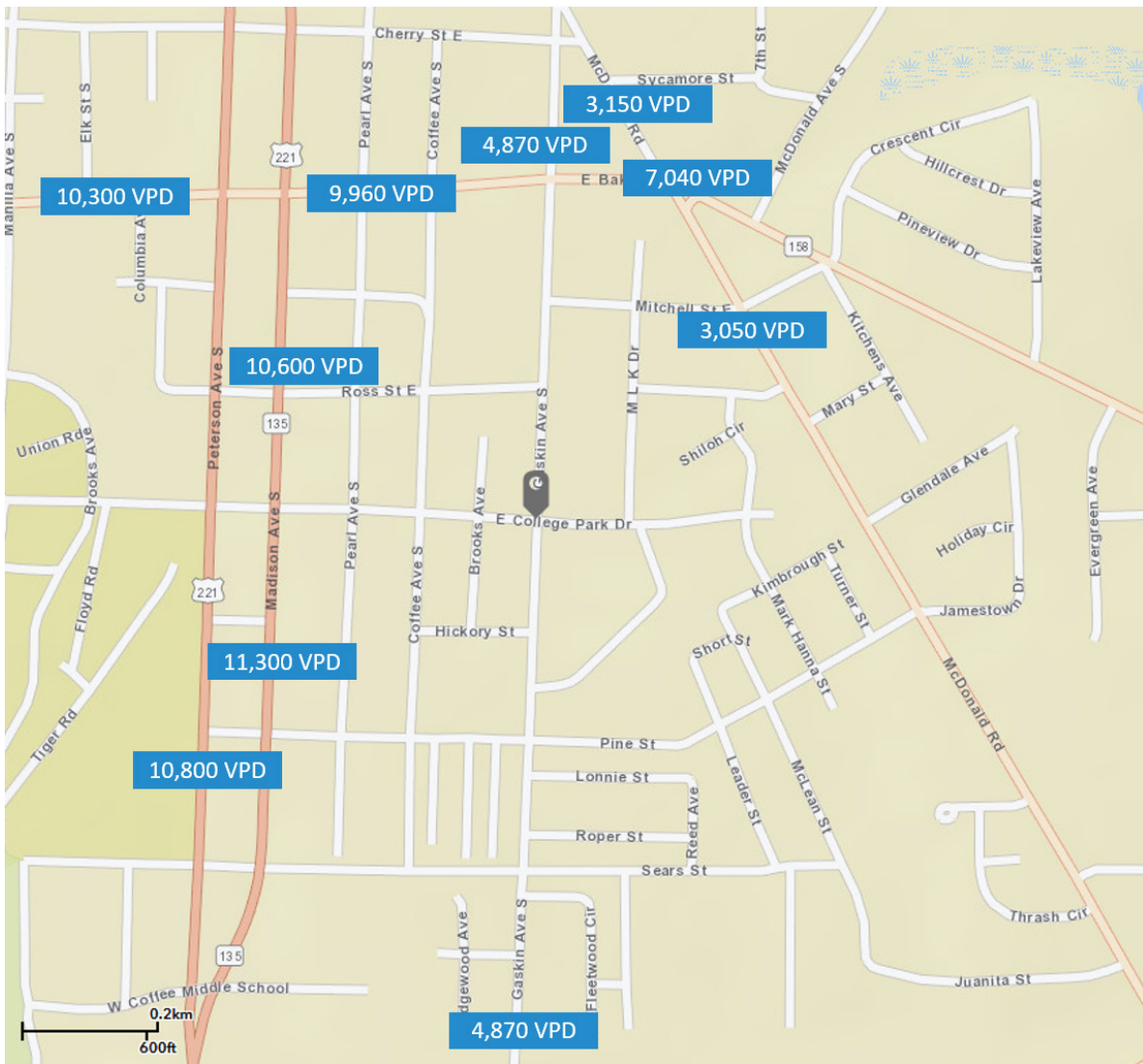


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Traffic Counts

The surrounding region has substantial traffic counts in vehicles per day, with truck traffic along the busiest corridors representing approximately six to 12 percent of vehicles. Nearby roads have traffic counts between 3,050 and 11,300 vehicles per day.

Figure 3. Traffic Counts.



Source: Georgia Department of Transportation (2020)



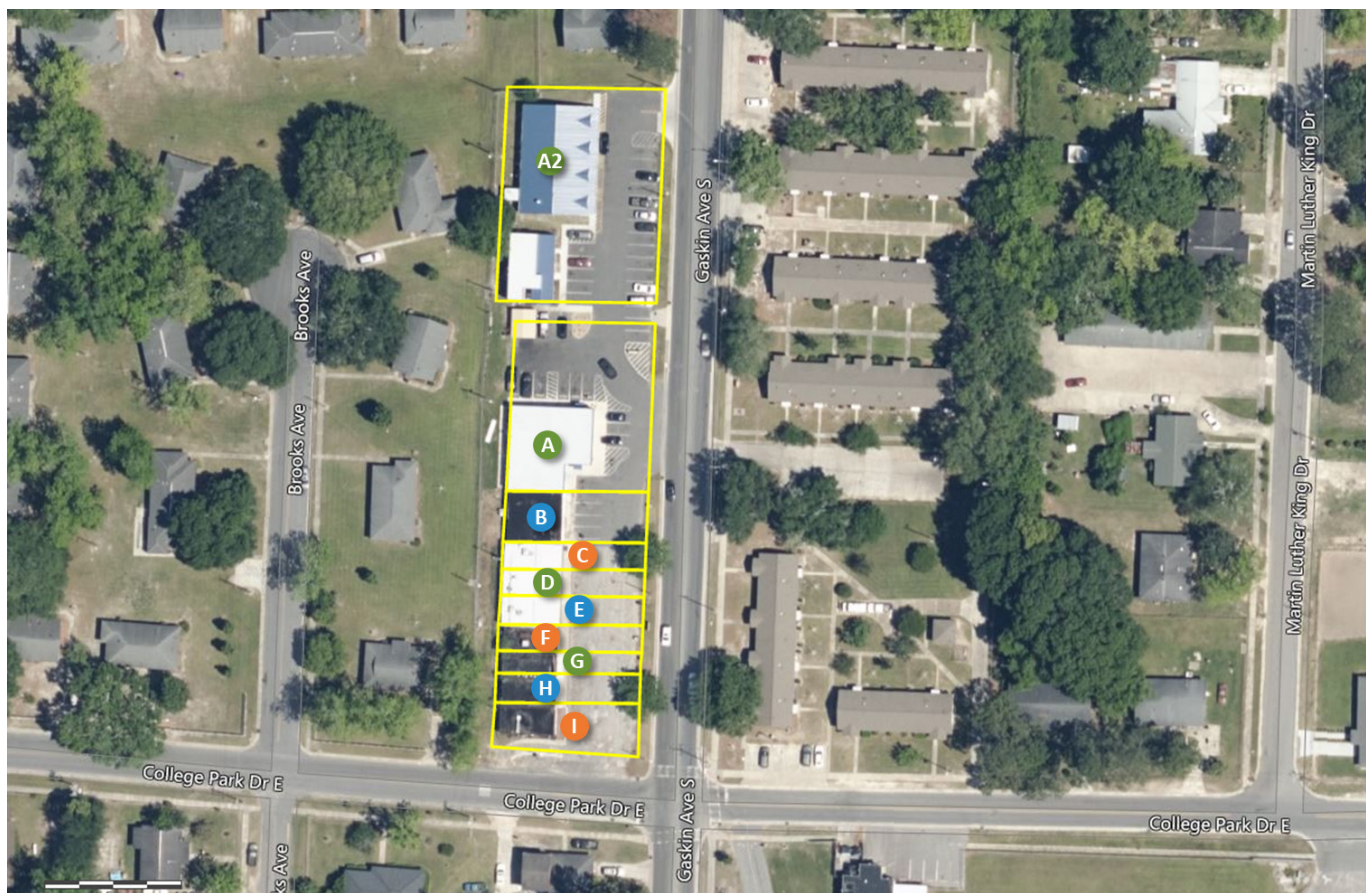
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Property Values and Current Status

The George Washington Carver Shopping Center has nine distinct property parcels. Several of these properties are vacant, while two contain eating establishments and one contains a space used by a nearby church.

All properties are zoned as C3-Commercial and have a millage rate of 32.673. The millage rate represents the amount per every \$1,000 of a property's assessed value. The assessed value of the property is calculated as 40 percent of the market value of the property. According to the Coffee County Assessor's Office, the George Washington Carver Shopping Center was constructed between 1964 and 1966. The market value of most parcels has been completely constant for the past few years, with the exception of property A and A2, or 915 Gaskin Avenue South. This property increased in accessory and improvement value in 2017 and 2018, which resulted in an increase in the total market value of the property. Properties A and A2 are listed as one parcel, and consists of the endcap of the shopping center (A) along with a separate newer building to the north of the center (A2).

Figure 4. George Washington Carver Shopping Center Parcels.





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Figure 5. George Washington Carver Shopping Center.

Property	Address	Parcel	Current Use	Prior Use (If Vacant)	Building Space (Square Footage)	Lot Size (Acres)	Property Owner
A + A2	915 S Gaskin Ave	D022 014	A Taste of Georgia (takeout restaurant)	N/A	3,200*	0.72	Tony Paulk & Lavinia Chevelle
B	919 S Gaskin Ave	D023 158	Vacant	Dollar Train	1,600	0.10	Franklin McNear
C	921 S Gaskin Ave	D023 159	Vacant	Gaskin Stop & Shop	800	0.05	Annie Ruth Swanson
D	925 S Gaskin Ave	D023 160	Swanson's Snack Bar (currently under renovation)	N/A	800	0.05	Annie Ruth Swanson
E	927 S Gaskin Ave	D023 161	Vacant	Simply Gorgeous Hair Salon	800	0.05	Annie Ruth Swanson
F	929 S Gaskin Ave	D023 162	Vacant	Dry Cleaner	800	0.05	Elisha Harrell
G	931 S Gaskin Ave	D023 163	Vacant	Laundromat	800	0.05	Elisha Harrell
H	933 S Gaskin Ave	D023 164	Vacant	Barber Shop; Tax Preparation Office	800	0.05	Jamie Lois King
I	937 S Gaskin Ave	D023 165	Everette Chapel Christian Methodist Episcopal Church	N/A	840	0.08	Izeal & Pearl Northcutt

Source: Coffee County Assessor's Office. *Square footage does not include property A2.

Figure 6. Property Values.

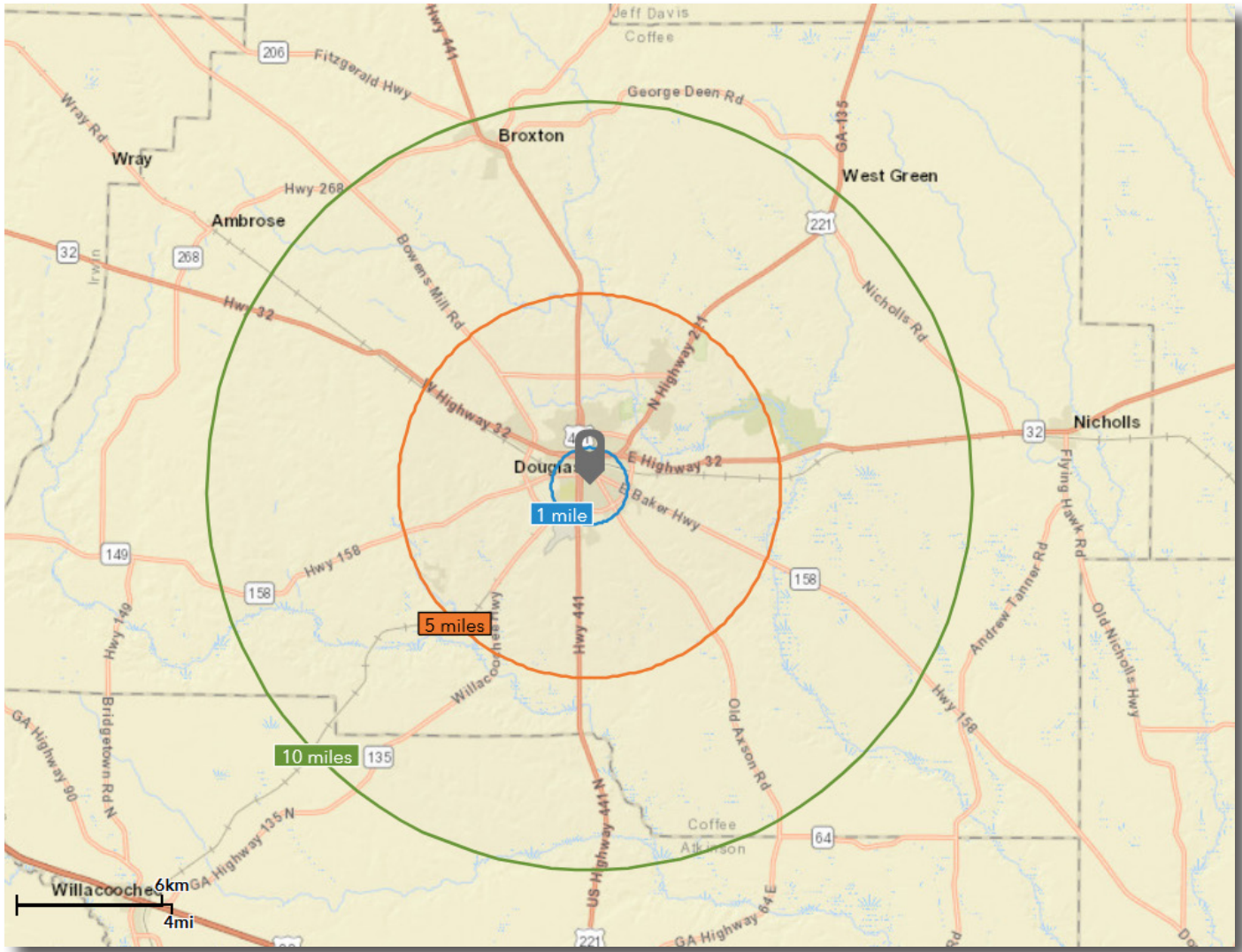
Property	2015					2020								
	Land Value	+	Improvement Value	+	Accessory Value	=	Market Value	Land Value	+	Improvement Value	+	Accessory Value	=	Market Value
A + A2	\$10,962		\$41,121		\$480		\$52,563	\$24,166		\$298,717		\$13,877		\$336,760
B	\$3,360		\$9,954		\$1,740		\$15,054	\$3,360		\$9,954		\$1,740		\$15,054
C	\$1,680		\$11,970		\$240		\$13,890	\$1,680		\$11,970		\$240		\$13,890
D	\$1,680		\$14,826		\$240		\$16,746	\$1,680		\$14,826		\$240		\$16,746
E	\$1,680		\$16,107		\$240		\$18,027	\$1,680		\$16,107		\$240		\$18,027
F	\$1,680		\$9,618		\$240		\$11,538	\$1,680		\$9,618		\$240		\$11,538
G	\$1,680		\$8,148		\$240		\$10,068	\$1,680		\$8,148		\$240		\$10,068
H	\$1,680		\$12,033		\$240		\$13,953	\$1,680		\$12,033		\$240		\$13,953
I	\$2,873		\$11,214		\$600		\$14,687	\$2,873		\$11,214		\$600		\$14,687

Source: Coffee County Assessor's Office



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REFERENCE MAP: 1-MILE, 5-MILE, AND 10-MILE RADII OF GEORGE WASHINGTON CARVER SHOPPING CENTER





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MARKET AREA ANALYSIS

Demographic Analysis

Population

The population in the area surrounding George Washington Carver Shopping Center is expected to remain mostly constant over the next five years between 2021 and 2026. The population is 4,850 within a 1-mile radius, 23,251 within a 5-mile radius, and 36,457 within a 10-mile radius. The daytime population within the area is similar to the total residential population within a 5-mile radius or 10-mile radius. However, the daytime population within a 1-mile radius of the shopping center is much higher at 7,635 than the total residential population of 4,850 within the same area.

The racial makeup within the 1-mile radius is majority Black (68.6 percent), while the 5-mile or 10-mile radius is majority White, followed by Black, with a significant percentage of Some Other Race. The Hispanic or Latino population, who can be of any race, is 6.0 percent of the population within a 1-mile radius, 13.7 percent within a 5-mile radius, and 14.1 percent within a 10-mile radius.

The median age is 33.7 years within a 1-mile radius, 35.6 years within a 5-mile radius, and 36.7 years within a 10-mile radius. The median age is creeping up over time and will be nearly two years older in each radius area by 2026. As of 2021, the region surrounding George Washington Carver Shopping Center is slightly younger than the median for the State of Georgia (37.2 years) or the nation (38.8 years).

Figure 7. Population Summary.

Population Summary	1 mile	5 miles	10 miles	Georgia	United States
2000 Total Population	4,141	20,551	31,242	8,186,453	281,421,906
2010 Total Population	4,687	22,556	34,989	9,687,653	308,745,538
2021 Total Population	4,850	23,251	36,457	10,815,378	333,934,112
2026 Total Population	4,863	23,456	36,924	11,392,648	345,887,495
2021-2026 Annual Rate	0.05%	0.18%	0.25%	1.05%	0.71%
2021 Total Daytime Population	7,635	27,908	37,965	10,744,575	332,118,242
Workers	4,763	15,212	17,858	5,054,085	156,849,265
Residents	2,872	12,696	20,107	5,690,490	175,268,977

Source: ESRI 2021



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Figure 8. Population by Race and Ethnicity.

2021 Population by Race/Ethnicity	1 mile	5 miles	10 miles	Georgia	United States
2021 Total Population	4,850	23,251	36,457	10,815,378	333,934,112
White Alone	25.2%	52.4%	59.6%	55.5%	69.2%
Black Alone	68.6%	35.4%	28.1%	32.3%	13.0%
American Indian Alone	0.2%	0.5%	0.5%	0.4%	1.0%
Asian Alone	0.5%	1.1%	1.0%	4.5%	5.9%
Pacific Islander Alone	0.1%	0.1%	0.0%	0.1%	0.2%
Some Other Race Alone	3.4%	8.6%	8.9%	4.5%	7.1%
Two or More Races	2.1%	2.0%	1.9%	2.8%	3.6%
Hispanic Origin*	6.0%	13.7%	14.1%	10.1%	18.9%

Source: ESRI 2021. *Hispanic people can be of any race.

Figure 9. Median Age.

Median Age	1 mile	5 miles	10 miles	Georgia	United States
2010	32.0	33.6	34.4	35.3	37.1
2021	33.7	35.6	36.7	37.2	38.8
2026	35.4	37.2	38.3	37.9	39.5

Source: ESRI 2021



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Households and Families

There are approximately 1,570 households within a 1-mile radius and 8,264 households within a 5-mile radius of the shopping center. There are 1,017 families within a 1-mile radius and 5,745 families within a 5-mile radius.

A household consists of all the people who occupy a housing unit. A household includes the related family members and all the unrelated people, if any, such as lodgers, foster children, wards, or employees who share the housing unit. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.

A family is a group of two people or more (one of whom is the householder) related by birth, marriage, or adoption and residing together; all such people (including related subfamily members) are considered as members of one family.

Figure 10. Households and Families.

Household Summary	1 mile	5 miles	10 miles	Georgia	United States
2000 Households	1,437	7,584	11,354	3,006,369	105,480,101
2000 Average Household Size	2.83	2.66	2.71	2.65	2.59
2010 Households	1,560	8,264	12,707	3,585,584	116,716,292
2010 Average Household Size	2.81	2.64	2.69	2.63	2.58
2021 Households	1,570	8,461	13,182	4,013,721	126,470,675
2021 Average Household Size	2.83	2.64	2.69	2.63	2.58
2026 Households	1,575	8,540	13,355	4,231,600	131,047,364
2026 Average Household Size	2.83	2.64	2.69	2.63	2.58
2021-2026 Annual Rate	0.06%	0.19%	0.26%	1.06%	0.71%
2010 Families	1,036	5,725	9,104	2,457,810	77,538,296
2010 Average Family Size	3.50	3.19	3.20	3.17	3.14
2021 Families	1,017	5,745	9,279	2,704,444	82,824,624
2021 Average Family Size	3.58	3.23	3.23	3.19	3.15
2026 Families	1,012	5,762	9,349	2,837,494	85,505,391
2026 Average Family Size	3.60	3.24	3.24	3.20	3.16
2021-2026 Annual Rate	-0.10%	0.06%	0.15%	0.97%	0.64%

Source: ESRI 2021



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Income

The median household income is \$60,605 in the State of Georgia and \$64,730 in the United States, while the median household income of the area surrounding George Washington Carver Shopping Center ranges from \$25,403 to \$41,656. Retailers often consider household incomes when selecting sites for new locations. Therefore, retailers with lower income targets should be prioritized for recruitment to the area.

Figure 11. Income.

Median Household Income	1 mile	5 miles	10 miles	Georgia	United States
2021	\$25,403	\$39,962	\$41,656	\$60,605	\$64,730
2026	\$28,056	\$43,489	\$45,912	\$68,338	\$72,932

Per Capita Income	1 mile	5 miles	10 miles	Georgia	United States
2021	\$13,569	\$20,470	\$21,519	\$32,105	\$35,106
2026	\$14,673	\$22,406	\$23,830	\$36,340	\$39,378

Average Household Income	1 mile	5 miles	10 miles	Georgia	United States
2021	\$36,103	\$55,986	\$59,066	\$86,247	\$92,435
2026	\$39,198	\$61,333	\$65,428	\$97,570	\$103,679

Source: ESRI 2021



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Education

Residents within a 1-mile radius, 5-mile radius, or 10-mile radius of the George Washington Carver Shopping Center are less likely to hold an education at the high school graduate level or higher than the state or national populations. Retailers often look at education levels when making location decisions so appropriate retailers should be targeted in line with the area’s education levels.

Figure 12. Educational Attainment.

2021 Population 25+ by Educational Attainment	1 mile	5 miles	10 miles	Georgia	United States
Total	3,058	15,113	24,109	7,305,299	230,565,279
Less than 9th Grade	8.5%	9.3%	8.4%	4.5%	4.7%
9th - 12th Grade, No Diploma	15.1%	13.8%	13.5%	7.3%	6.4%
High School Graduate	34.4%	29.0%	30.0%	22.6%	22.9%
GED/Alternative Credential	7.3%	6.1%	6.0%	4.6%	4.0%
Some College, No Degree	20.4%	18.3%	18.0%	19.9%	19.8%
Associate Degree	7.8%	7.8%	8.2%	8.1%	8.7%
Bachelor's Degree	3.7%	8.9%	9.2%	20.2%	20.6%
Graduate/Professional Degree	2.8%	6.6%	6.7%	12.9%	13.0%
High School Graduate/Equivalent or Higher	76.4%	76.7%	78.1%	88.3%	89.0%

Source: ESRI 2021



GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY

Employment

Another factor considered by retailers making location decisions is the industries and occupations that make up the bulk of an area's employment base. Within the 1-mile radius, 5-mile radius, and 10-mile radius of the George Washington Carver Shopping Center, a higher percentage of workers are employed in Manufacturing and Retail Trade industries than the state or national employment base. The 1-mile radius has relatively high percentages of Services and Public Administration employees. The workforce within the area is skewed more toward Services and Blue Collar occupations than toward White Collar occupations when compared to the state and national employment bases.

Figure 13. Employment by Industry.

2021 Employed Population 16+ by Industry	1 mile	5 miles	10 miles	Georgia	United States
Total	1,899	10,503	16,312	5,050,062	157,284,361
Agriculture/Mining	1.2%	2.9%	3.7%	1.0%	1.7%
Construction	2.2%	6.1%	6.8%	7.0%	7.1%
Manufacturing	14.7%	16.8%	16.8%	10.5%	9.9%
Wholesale Trade	0.2%	1.8%	2.4%	2.8%	2.5%
Retail Trade	12.8%	12.4%	12.4%	10.7%	10.7%
Transportation/Utilities	5.9%	5.0%	5.1%	7.5%	6.0%
Information	1.2%	0.9%	0.8%	2.2%	1.8%
Finance/Insurance/Real Estate	0.3%	1.9%	2.5%	6.8%	7.1%
Services	49.3%	45.4%	43.7%	46.3%	48.0%
Public Administration	12.3%	6.8%	5.8%	5.2%	5.2%

Source: ESRI 2021

Figure 14. Employment by Occupation.

2021 Employed Population 16+ by Occupation	1 mile	5 miles	10 miles	Georgia	United States
Total	1,889	10,504	16,312	5,050,062	157,284,361
White Collar	47.5%	51.7%	53.0%	62.8%	63.1%
Management/Business/Financial	5.0%	11.9%	12.9%	18.3%	17.9%
Professional	20.7%	20.9%	21.2%	23.5%	24.8%
Sales	10.0%	8.9%	9.7%	9.7%	9.3%
Administrative Support	11.9%	10.0%	9.2%	11.3%	11.2%
Services	21.2%	17.1%	15.2%	13.9%	15.1%
Blue Collar	31.3%	31.2%	31.8%	23.3%	21.8%
Farming/Forestry/Fishing	0.5%	1.2%	1.5%	0.4%	0.6%
Construction/Extraction	1.5%	4.4%	5.1%	4.9%	5.2%
Installation/Maintenance/Repair	0.2%	1.4%	1.7%	3.3%	2.9%
Production	10.3%	9.4%	9.9%	5.6%	5.2%
Transportation/Material Moving	18.7%	14.8%	13.6%	9.2%	7.9%

Source: ESRI 2021



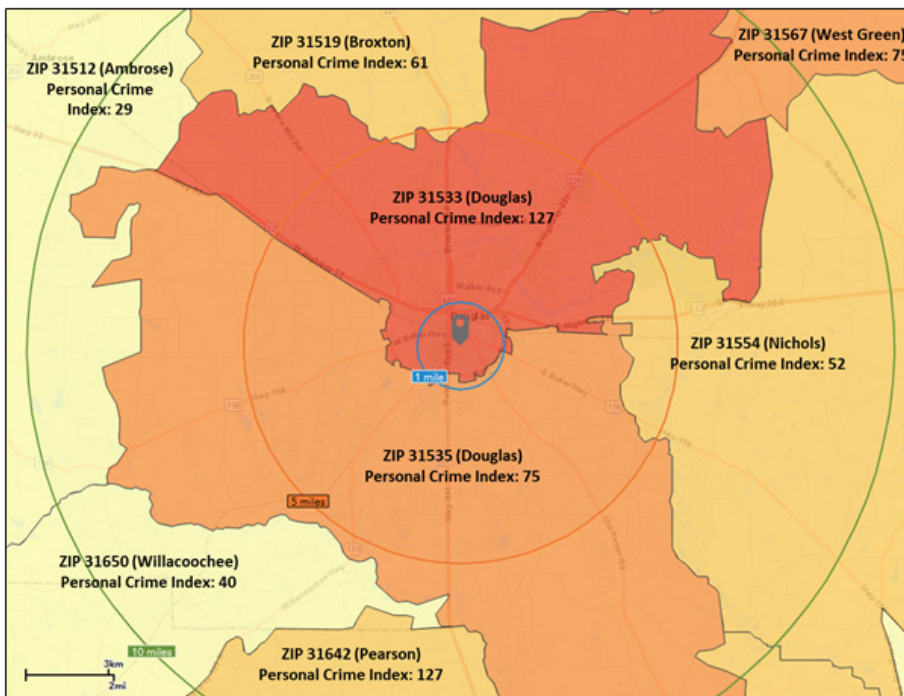
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Crime

The Personal Crime Index provides an assessment of the relative risk of four major crime types: murder, rape, robbery, and assault. It is modeled using data from the FBI Uniform Crime Report and demographic data from the Census and Applied Geographic Solutions (AGS). An index of 100 is the average for the United States. Indices above 100 are considered high crime, while indices below 100 are considered low crime. The Personal Crime Index in the ZIP code immediately to the north of the George Washington Carver Shopping Center is higher than average, while the Personal Crime Index in the ZIP code to the south of the property is lower than average.

The Property Crime Index provides an assessment of the relative risk of three major crime types: burglary, larceny, and motor vehicle theft. It is modeled using data from the FBI Uniform Crime Report and demographic data from the Census and Applied Geographic Solutions (AGS). As for the Personal Crime Index, a Property Crime Index of 100 is the average for the United States. Indices above 100 are considered high crime, while indices below 100 are considered low crime. The Property Crime Indices in the ZIP codes to the north and south of the property are both higher than average.

Figure 15. Personal Crime Index by ZIP Code.

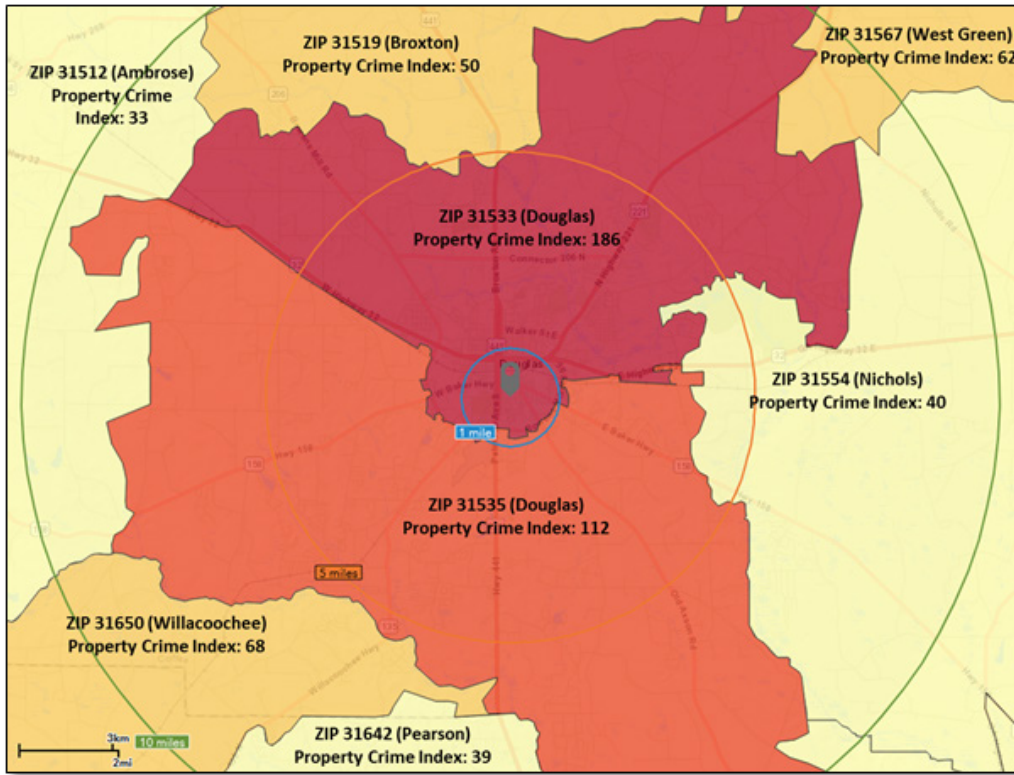


Source: ESRI 2021



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Figure 16. Property Crime Index by ZIP Code.



Source: ESRI 2021



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Tapestry Segmentation Analysis

ESRI's Tapestry Segmentation is a system that classifies US neighborhoods based on their socioeconomic and demographic compositions. The power of Tapestry Segmentation allows you to profile consumers in a number of ways including by ZIP code. Tapestry Segmentation combines the 68 segments into 14 LifeMode summary groups for a broader view of US consumer markets based on lifestyle and lifestage.

Figure 17. LifeMode Summary Groups (ESRI).



All of the dominant Tapestry Segments in ZIP codes surrounding George Washington Carver Shopping Center are grouped into LifeMode 10 Rural Outposts, which is generally characterized by a particular set of criteria as listed below. There are five specific Tapestry Segments contained within LifeMode 10: 10A Southern Satellites, 10B Rooted Rural, 10C Economic BedRock, 10D Down the Road, and 10E Rural Bypasses.

Figure 18. LifeMode 10 Rustic Outposts (ESRI).

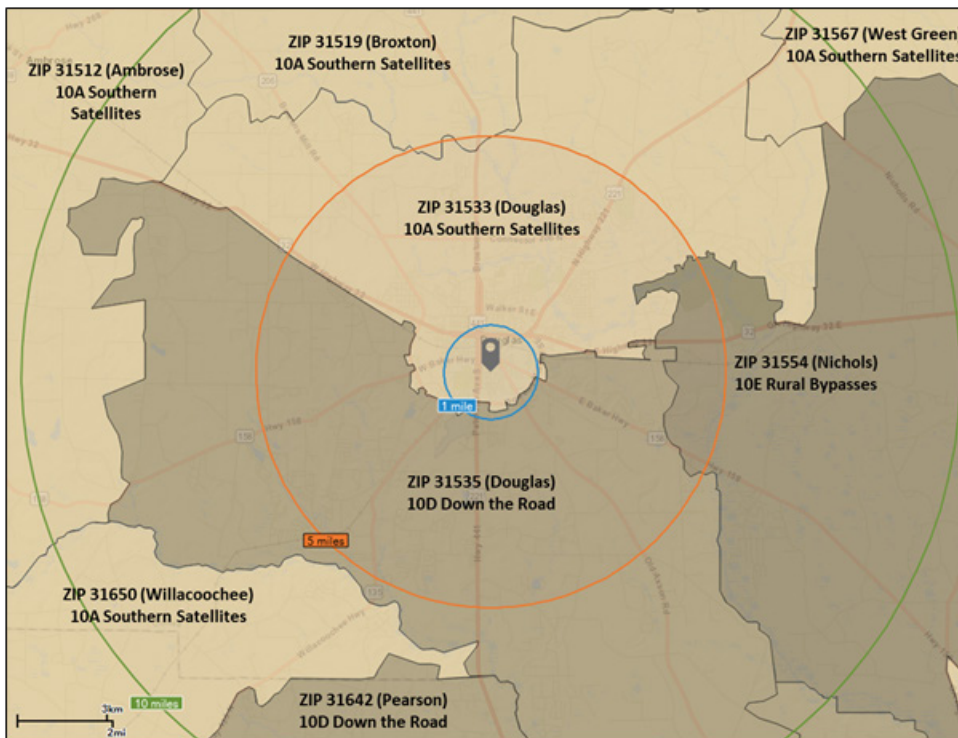
<ul style="list-style-type: none"> • Country life with older families in older homes. • Depend on manufacturing, retail, and healthcare, with pockets of mining and agricultural jobs. • Low labor force participation in skilled and service occupations. • Own affordable, older single-family or mobile homes; vehicle ownership is a must. • Residents live within their means, shop at discount stores, and maintain their own vehicles (purchased used) and homes. • Outdoor enthusiasts, who grow their own vegetables, love their pets, and enjoy hunting and fishing. • Pay bills in person; use the yellow pages; read newspapers, magazines, and mail-order books. 	10A Southern Satellites
	10B Rooted Rural
	10C Economic BedRock
	10D Down the Road
	10E Rural Bypasses



Tapestry Segmentation Analysis

People grouped into particular Tapestry Segments may not necessarily fall perfectly into the description of the given Tapestry Segment but will share many characteristics with others in that Tapestry Segment. The value of Tapestry Segmentation is for researchers, stakeholders, policymakers, and others to get a feel for the general values and characteristics of people in a given area.

Figure 19. Dominant Tapestry Segment by ZIP Code.




Source: ESRI 2021



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Tapestry Segmentation Analysis

In ZIP codes 31533 (Douglas), 31567 (West Green), 31519 (Broxton), 31512 (Ambrose), and 31650 (Willacoochee), the dominant tapestry segment is **10A Southern Satellites**.



LifeMode Group: Rustic Outposts
Southern Satellites 10A

Households: 3,856,800
Average Household Size: 2.67
Median Age: 40.3
Median Household Income: \$47,800


In ZIP code 31535 (Douglas), the dominant tapestry segment is **10D Down the Road**.



LifeMode Group: Rustic Outposts
Down the Road 10D

Households: 1,406,700
Average Household Size: 2.76
Median Age: 35.0
Median Household Income: \$38,700

In ZIP code 31554 (Nichols), the dominant tapestry segment is **10E Rural Bypasses**.



LifeMode Group: Rustic Outposts
Rural Bypasses 10E

Households: 1,646,400
Average Household Size: 2.55
Median Age: 40.4
Median Household Income: \$33,000



GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY

CONSUMER SPENDING ANALYSIS

The top household spending categories for any given area are typically Shelter, followed by Health Care and Food at Home. The 1-mile, 5-mile, and 10-mile radii surrounding George Washington Carver Shopping Center are no exception to this rule. Residents spend significantly less on these categories and others within a 1-mile radius of the shopping center, which is reflective of lower income levels and lower cost of living in the immediate area.

Figure 20. Top Household Spending Categories.

Spending Categories	1 mile	5 miles	10 miles	Georgia	United States
Shelter	\$7,527.69	\$11,332.09	\$11,816.32	\$18,317.84	\$20,156.28
Health Care	\$2,736.64	\$4,299.14	\$4,548.69	\$6,026.22	\$6,236.87
Food at Home	\$2,325.00	\$3,632.59	\$3,799.65	\$5,207.91	\$5,448.67
Food Away from Home	\$1,528.16	\$2,379.55	\$2,498.00	\$3,606.32	\$3,795.94
Entertainment/Recreation	\$1,330.23	\$2,091.36	\$2,204.58	\$3,061.68	\$3,230.70
Support Payments/Cash Contributions/Gifts in Kind	\$931.50	\$1,544.38	\$1,634.05	\$2,287.47	\$2,390.55
HH Furnishings & Equipment	\$899.31	\$1,418.39	\$1,499.17	\$2,140.76	\$2,254.86
Travel	\$895.63	\$1,412.94	\$1,499.30	\$2,306.17	\$2,527.91
Apparel & Services	\$855.74	\$1,300.05	\$1,362.98	\$2,001.48	\$2,120.09
Education	\$587.34	\$865.75	\$908.17	\$1,509.97	\$1,725.95
Vehicle Maintenance & Repairs	\$489.96	\$766.71	\$801.64	\$1,085.27	\$1,108.20
Personal Care Products & Services	\$358.22	\$547.80	\$575.59	\$842.67	\$897.45

Source: ESRI 2021



GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY

Figure 21. 2021 Consumer Spending.

2021 Consumer Spending	1 mile	5 miles	10 miles	Georgia	United States
Apparel & Services: Total	\$1,343,519	\$10,999,734	\$17,966,866	\$8,033,388,107	\$268,129,213,361
Average Spent	\$855.74	\$1,300.05	\$1,362.98	\$2,001.48	\$2,120.09
Education: Total	\$922,129	\$7,325,095	\$11,971,460	\$6,060,583,509	\$218,282,061,516
Average Spent	\$587.34	\$865.75	\$908.17	\$1,509.97	\$1,725.95
Entertainment/Recreation: Total	\$2,088,461	\$17,694,977	\$29,060,800	\$12,288,725,608	\$408,588,809,723
Average Spent	\$1,330.23	\$2,091.36	\$2,204.58	\$3,061.68	\$3,230.70
Food at Home: Total	\$3,650,252	\$30,735,319	\$50,087,045	\$20,903,110,435	\$689,096,972,752
Average Spent	\$2,325.00	\$3,632.59	\$3,799.65	\$5,207.91	\$5,448.67
Food Away from Home: Total	\$2,399,218	\$20,133,405	\$32,928,656	\$14,474,752,611	\$480,075,094,060
Average Spent	\$1,528.16	\$2,379.55	\$2,498.00	\$3,606.32	\$3,795.94
Health Care: Total	\$4,296,523	\$36,375,065	\$59,960,796	\$24,187,574,996	\$788,781,158,787
Average Spent	\$2,736.64	\$4,299.14	\$4,548.69	\$6,026.22	\$6,236.87
HH Furnishings & Equipment: Total	\$1,411,915	\$12,001,029	\$19,762,112	\$8,592,417,407	\$285,173,666,231
Average Spent	\$899.31	\$1,418.39	\$1,499.17	\$2,140.76	\$2,254.86
Personal Care Products & Services: Total	\$562,410	\$4,634,908	\$7,587,454	\$3,382,251,339	\$113,501,107,279
Average Spent	\$358.22	\$547.80	\$575.59	\$842.67	\$897.45
Shelter: Total	\$11,818,468	\$95,880,819	\$155,762,770	\$73,522,711,786	\$2,549,178,337,090
Average Spent	\$7,527.69	\$11,332.09	\$11,816.32	\$18,317.84	\$20,156.28
Support Payments/Cash Contributions/Gifts in Kind: Total	\$1,462,461	\$13,066,987	\$21,540,077	\$9,181,258,562	\$302,334,472,121
Average Spent	\$931.50	\$1,544.38	\$1,634.05	\$2,287.47	\$2,390.55
Travel: Total	\$1,406,141	\$11,954,882	\$19,763,742	\$9,256,315,530	\$319,706,484,039
Average Spent	\$895.63	\$1,412.94	\$1,499.30	\$2,306.17	\$2,527.91
Vehicle Maintenance & Repairs: Total	\$769,245	\$6,487,139	\$10,567,189	\$4,355,977,240	\$140,154,802,035
Average Spent	\$489.96	\$766.71	\$801.64	\$1,085.27	\$1,108.20

Source: ESRI 2021



GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY

RETAIL LEAKAGE AND SURPLUS

Within the 1-mile radius trade area, the industry groups with a surplus retail demand (retail gap) are Electronic Shopping & Mail-Order Houses (NAICS 4541), Special Food Services (NAICS 7223), and Drinking Places – Alcoholic Beverages (NAICS 7224). Special Food Services includes caterers, while Drinking Places refers to bars.

Within the 5-mile radius trade area, additional industry groups with surplus retail demand are Book, Periodical, and Music Stores (NAICS 4512), Other General Merchandise Stores (NAICS 4529), and Used Merchandise Stores (NAICS 4533). Other General Merchandise Stores can refer to variety or dollar stores, while Used Merchandise Stores refers to thrift or consignment shops.

Within the 10-mile radius trade area, unique industry groups with surplus retail demand are Other Motor Vehicle Dealers (NAICS 4412); Home Furnishing Stores (NAICS 4422); Electronics and Appliance Stores (NAICS 4431); Gasoline Stations (NAICS 4471); Clothing Stores (NAICS 4481); Jewelry, Luggage, and Leather Goods Stores (NAICS 4483); Sporting Goods, Hobby, and Musical Instrument Stores (NAICS 4511); and Office Supplies, Stationery, and Gift Stores (NAICS 4532).

See below Figure 22, Figure 23, and Figure 24 for a summary of industry groups with excess retail demand or retail leakage. See the Retail MarketPlace Profile in the Appendix of this document for more information on retail demand and supply in the area surrounding the shopping center.

Figure 22. Surplus Retail Demand: 1-Mile Radius.

2017 Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Businesses
Electronic Shopping & Mail-Order Houses	4541	\$2,270,360	\$0	\$277,030	0
Special Food Services	7223	\$28,169	\$0	\$28,169	0
Drinking Places - Alcoholic Beverages	7224	\$58,665	\$0	\$58,665	0

Source: ESRI (2017 data)

Figure 23. Surplus Retail Demand: 5-Mile Radius.

2017 Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Businesses
Book, Periodical, and Music Stores	4512	\$648,724	\$250,296	\$398,446	1
Other General Merchandise Stores	4529	\$9,488,192	\$7,431,834	\$2,056,358	11
Used Merchandise Stores	4533	\$1,012,959	\$814,396	\$198,563	8
Electronic Shopping & Mail-Order Houses	4541	\$1,641,283	\$1,141,230	\$500,053	1
Drinking Places - Alcoholic Beverages	7224	\$407,280	\$0	\$407,280	0

Source: ESRI (2017 data)



GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY

Figure 24. Surplus Retail Demand: 10-Mile Radius.

2017 Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Businesses
Other Motor Vehicle Dealers	4412	\$6,191,821	\$5,425,564	\$766,257	7
Home Furnishing Stores	4422	\$5,293,325	\$3,806,153	\$1,487,172	5
Electronics and Appliance Stores	4431	\$10,017,414	\$8,582,542	\$1,434,872	5
Special Food Services	7223	\$3,186,839	\$2,463,169	\$723,670	5
Gasoline Stations	4471	\$39,753,307	\$39,136,096	\$617,211	21
Clothing Stores	4481	\$9,491,472	\$6,706,992	\$2,784,480	15
Jewelry, Luggage, and Leather Goods Stores	4483	\$2,229,779	\$1,603,456	\$626,323	4
Sporting Goods, Hobby, and Musical Instrument Stores	4511	\$6,960,645	\$5,288,786	\$1,671,859	10
Book, Periodical, and Music Stores	4512	\$1,046,793	\$250,296	\$796,497	1
Other General Merchandise Stores	4529	\$15,384,327	\$9,494,530	\$5,889,797	15
Office Supplies, Stationery, and Gift Stores	4532	\$1,989,785	\$1,290,346	\$699,439	8
Used Merchandise Stores	4533	\$1,637,414	\$870,804	\$766,610	8
Electronic Shopping & Mail-Order Houses	4541	\$2,666,975	\$1,458,240	\$1,208,735	1
Special Food Services	7223	\$335,395	\$308,624	\$26,771	2
Drinking Places - Alcoholic Beverages	7224	\$658,008	\$0	\$658,008	0

Source: ESRI (2017 data)

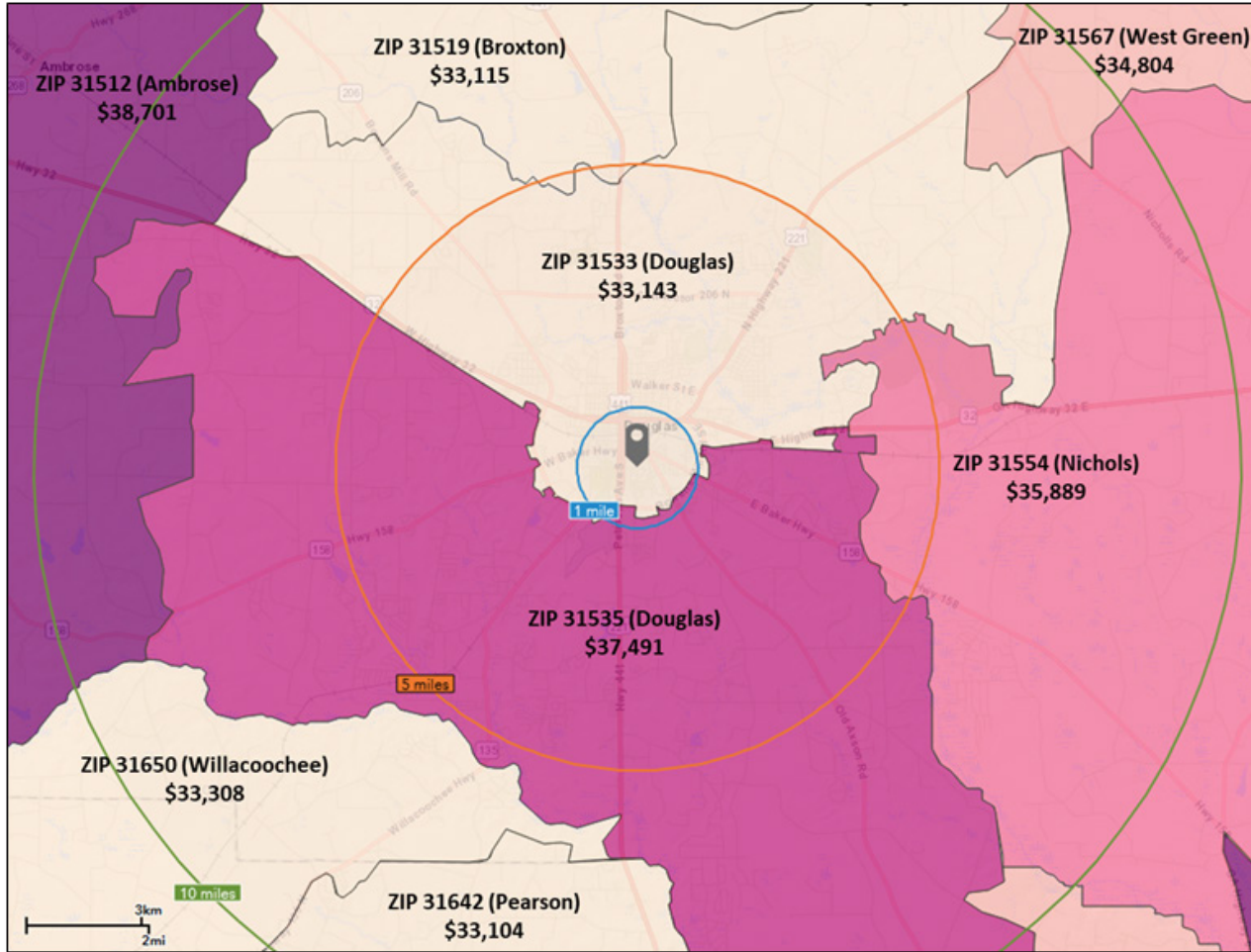


GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY

DISPOSABLE INCOME

The median disposable income is higher in the ZIP code to the south of the shopping center than it is in the ZIP code to the north of the shopping center.

Figure 25. Median Disposable Income.



Source: ESRI 2021



Key Takeaways

- Income levels and spending are generally lower in the area surrounding the shopping center than is typical in state or national markets.
- Demographic and economic data, as well as tapestry segmentation, point to a population within the trade area that is typically employed in blue collar or service occupations, are practical, and tend to shop at discount stores.
- Retail leakage and surplus data points to a possible demand for retailers such as caterers, bars, variety or dollar stores, thrift or consignment shops,
- Other examples of possible uses for the vacant spaces in the shopping center are religious services, professional offices, and community centers owned by community organizations.



Redevelopment Scenarios

Historic shopping centers provide cultural and tangible value to communities which have them. However, over time, the original purpose of many such shopping centers changes as consumer needs in the community shift. Many communities with historic shopping centers have found themselves tasked with redevelopment and revitalization efforts that are challenging. Communities want these shopping centers to keep their character intact, while restoring the practical value the shopping centers once offered to the community. In efforts to redevelop shopping centers with historic or cultural value, there is no one-size-fits-all solution.

One approach is to “retrofit” these shopping centers by giving them a façade and parking area update, to make the shopping center more attractive to potential new infill retailers and to customers the retailers are trying to attract.

Other solutions include adding outparcels to the center to increase versatility and attractiveness to retailers who may be interested in different retail building types. However, when faced with existing vacancy and oversupply issues, adding more square footage to a shopping center is a difficult-to-justify expense and effort. Even adding outparcels cannot compensate for a lack of market demand.

A more drastic solution might be to demolish the existing structure and rebuild a more modern-looking shopping center in its place to attract a set of new retailers and restaurants. Even if this approach makes financial sense, in the case of a historic shopping center with cultural value to the community, this scenario may be unsatisfactory if the community wishes to preserve the character of the original building or buildings. In addition, this would likely be a costly endeavor and the demand for retail, restaurants, and services in this location would need to be sufficiently and unambiguously high enough to justify the expense and effort involved in rebuilding the shopping center from scratch. Community buy-in and desire for this scenario would need to be secured as well.

In any case, the most important first step in shopping center redevelopment should be an assessment of the market conditions and the demand for retail, restaurants, and services in the surrounding trade area. In this case, the market analysis presented in this study shows that excess market demand within the 1-mile trade area exists in few sectors; namely, Special Food Services (such as catering), and Drinking Places - Alcoholic Beverages (such as bars).



GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY

Expanding our trade area out to the 5-mile radius yields excess demand in the following sectors:

- Book, Periodical, and Music Stores
- Other General Merchandise Stores
- Used Merchandise Stores
- Electronic Shopping & Mail-Order Houses
- Drinking Places – Alcoholic Beverages

There are limitations to the data sources that report excess demand, and they do not tell the whole story. Furthermore, retail data does not account for values and goals of a community and can exclude creative solutions that fall outside the pure retail space, such as religious meeting places, community centers, professional offices, and mixed use developments. The parcel and building sizes of the shopping center are also on the smaller side, limiting retail and professional possible users to a small subset.

The possibilities for shopping center revitalization are numerous but, for a successful revitalization, the key points to underscore are:

- Local governments, property owners, and community stakeholders should come to the table together and have a realistic picture of market demand and supply so that expectations are reasonable. Public policy and development decisions should take place within the context of realism and understanding of the market realities.
- Proactive management of zoning and permitting approvals to achieve a more desirable mix of retail and services in the shopping center.
- Emphasizing the walkability, and, where possible, bikeability of a shopping center, which increases access to the shopping center by people who may not own a car and by residents in the immediate vicinity, or the 1-mile radius trade area. The shopping center is somewhat walkable and within a mile of other amenities like grocery stores and close to residential areas.
- Typically, depending on the size of the center, the ideal combination of strip center tenants includes a mix of the following:
 - Health and beauty (hair and nail salons, barbershops)
 - Restaurants (casual and affordable dining)
 - Fitness
 - Service (laundromats and dry cleaners, smartphone stores, tax preparation services, and medical and dental services are also a growing trend in smaller shopping centers)
 - Entertainment (like an indoor children's playground)
 - Bargain boutiques
- Strip center tenants are smaller operations, they have a strong need for high foot traffic, and a proper mix of tenants can help boost that number. One technique is to consider co-tenancy, understanding that certain businesses have specific peak times. By creating a balance, it is possible to keep the parking lot full all day long so each of the businesses can flourish based on patronage patterns.



GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY

Examples

The George Washington Carver Shopping Center is classified as a strip center type of shopping center according to the International Council of Shopping Centers (ICSC), which means that all tenants are small in square footage and consist entirely of convenience retail and dining. Examples of revitalizations of similarly sized and positioned shopping centers are presented below.

Example 1: Rainbow Square, Wilmington, North Carolina

Rainbow Square is a small, 11,200-square-foot strip center built in 1974 located at 3901 Wrightsville Avenue in Wilmington, North Carolina. The property was purchased in November 2018 by Remarkable Properties LLC, who repaved the parking lot and completed significant façade improvements to attract higher-value retailers and to bring in customers. [More info.](#)

BEFORE



AFTER



Example 2: Grow DeSoto Market Place, DeSoto, Texas

The Grow DeSoto Market Place is a 26,000-square-foot space located in DeSoto, Texas. This building once housed ACE Hardware as its anchor tenant for many years. The facility has since been repurposed and now houses a variety of restaurants, retail spaces, and offices for small business owners. The building is a public-private partnership, which is currently leased to a variety of microbusinesses ranging from restaurants to a full-service fitness/rehabilitation center. [More info.](#)

BEFORE



AFTER





GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY

Example 3: Alta Sunrise Retail Center, Citrus Heights, California

Located at 5450 Sunrise Blvd, the Alta Sunrise Retail Center experienced an extensive remodel in 2017 in an effort to update the aging shopping center and accommodate restaurant tenants. [More info.](#)

BEFORE



AFTER





GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY

APPENDIX

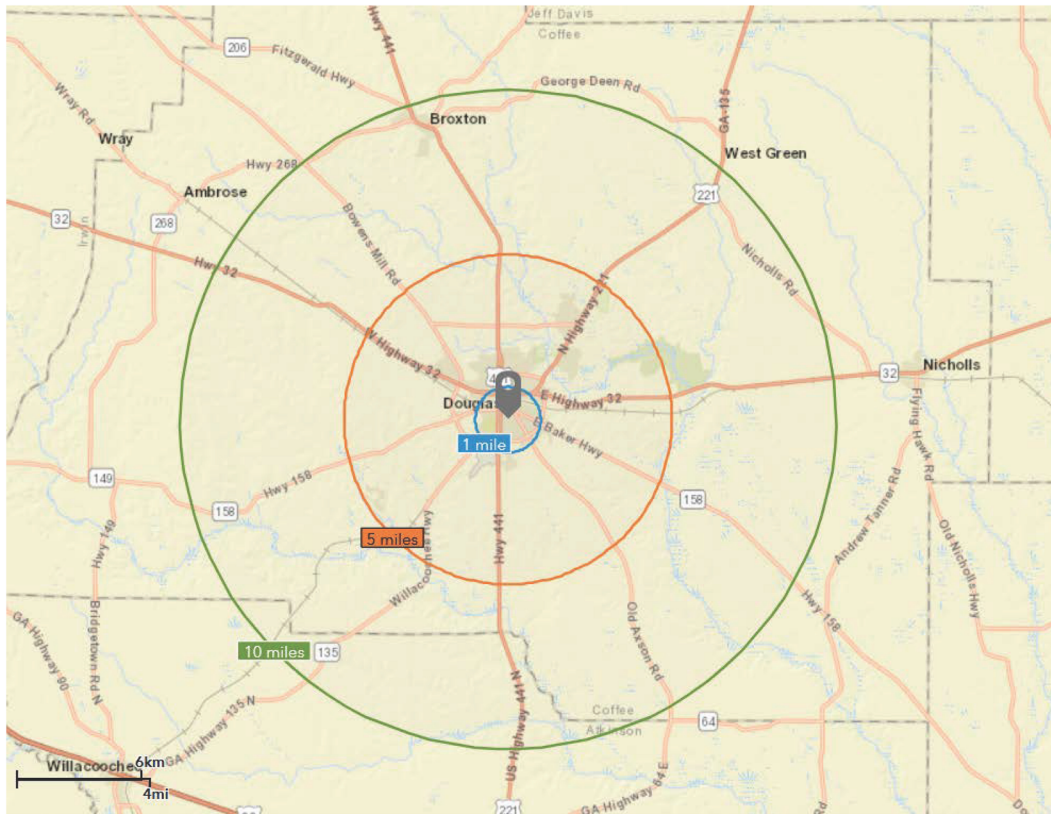
Community Profile



Community Profile

George Washington Carver Shopping Center
Gaskin Ave S & E College Park Dr, Douglas, Georgia, 31533
Rings: 1, 5, 10 mile radii

Prepared by ECG
Latitude: 31.49689
Longitude: -82.84565



June 30, 2021

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GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY



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	1 mile	5 miles	10 miles
Population Summary			
2000 Total Population	4,141	20,551	31,242
2010 Total Population	4,687	22,556	34,989
2021 Total Population	4,850	23,251	36,457
2021 Group Quarters	401	878	947
2026 Total Population	4,863	23,456	36,924
2021-2026 Annual Rate	0.05%	0.18%	0.25%
2021 Total Daytime Population	7,635	27,908	37,965
Workers	4,763	15,212	17,858
Residents	2,872	12,696	20,107
Household Summary			
2000 Households	1,437	7,584	11,354
2000 Average Household Size	2.83	2.66	2.71
2010 Households	1,560	8,264	12,707
2010 Average Household Size	2.81	2.64	2.69
2021 Households	1,570	8,461	13,182
2021 Average Household Size	2.83	2.64	2.69
2026 Households	1,575	8,540	13,355
2026 Average Household Size	2.83	2.64	2.69
2021-2026 Annual Rate	0.06%	0.19%	0.26%
2010 Families	1,036	5,725	9,104
2010 Average Family Size	3.50	3.19	3.20
2021 Families	1,017	5,745	9,279
2021 Average Family Size	3.58	3.23	3.23
2026 Families	1,012	5,762	9,349
2026 Average Family Size	3.60	3.24	3.24
2021-2026 Annual Rate	-0.10%	0.06%	0.15%
Housing Unit Summary			
2000 Housing Units	1,779	8,918	13,250
Owner Occupied Housing Units	46.1%	58.4%	62.8%
Renter Occupied Housing Units	34.6%	26.7%	22.9%
Vacant Housing Units	19.2%	15.0%	14.3%
2010 Housing Units	1,812	9,466	14,547
Owner Occupied Housing Units	40.4%	53.6%	58.9%
Renter Occupied Housing Units	45.7%	33.7%	28.5%
Vacant Housing Units	13.9%	12.7%	12.6%
2021 Housing Units	1,859	9,861	15,337
Owner Occupied Housing Units	34.6%	47.9%	53.9%
Renter Occupied Housing Units	49.8%	37.9%	32.0%
Vacant Housing Units	15.5%	14.2%	14.1%
2026 Housing Units	1,884	10,038	15,667
Owner Occupied Housing Units	34.5%	47.9%	53.9%
Renter Occupied Housing Units	49.1%	37.2%	31.4%
Vacant Housing Units	16.4%	14.9%	14.8%
Median Household Income			
2021	\$25,403	\$39,962	\$41,656
2026	\$28,056	\$43,489	\$45,912
Median Home Value			
2021	\$88,528	\$117,667	\$123,844
2026	\$98,592	\$135,396	\$145,419
Per Capita Income			
2021	\$13,569	\$20,470	\$21,519
2026	\$14,673	\$22,406	\$23,830
Median Age			
2010	32.0	33.6	34.4
2021	33.7	35.6	36.7
2026	35.4	37.2	38.3

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2021 and 2026 Esri converted Census 2000 data into 2010 geography.

June 30, 2021





GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY



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	1 mile	5 miles	10 miles
2021 Households by Income			
Household Income Base	1,570	8,461	13,182
<\$15,000	30.2%	19.2%	17.5%
\$15,000 - \$24,999	19.4%	15.0%	14.5%
\$25,000 - \$34,999	7.5%	10.2%	10.8%
\$35,000 - \$49,999	17.7%	13.7%	13.7%
\$50,000 - \$74,999	16.2%	20.8%	19.9%
\$75,000 - \$99,999	5.4%	9.2%	9.5%
\$100,000 - \$149,999	2.5%	6.0%	7.5%
\$150,000 - \$199,999	0.8%	2.9%	3.6%
\$200,000+	0.3%	2.8%	3.0%
Average Household Income	\$36,103	\$55,986	\$59,066
2026 Households by Income			
Household Income Base	1,575	8,540	13,355
<\$15,000	28.3%	17.4%	15.6%
\$15,000 - \$24,999	19.0%	14.2%	13.7%
\$25,000 - \$34,999	7.5%	10.1%	10.8%
\$35,000 - \$49,999	17.7%	13.0%	12.7%
\$50,000 - \$74,999	17.5%	22.0%	20.6%
\$75,000 - \$99,999	5.9%	10.1%	10.3%
\$100,000 - \$149,999	2.9%	7.1%	8.9%
\$150,000 - \$199,999	0.9%	3.2%	4.1%
\$200,000+	0.3%	3.0%	3.3%
Average Household Income	\$39,198	\$61,333	\$65,428
2021 Owner Occupied Housing Units by Value			
Total	644	4,728	8,271
<\$50,000	22.4%	18.5%	18.7%
\$50,000 - \$99,999	35.9%	23.9%	22.1%
\$100,000 - \$149,999	22.7%	21.5%	19.3%
\$150,000 - \$199,999	6.8%	14.5%	15.4%
\$200,000 - \$249,999	4.2%	6.4%	7.8%
\$250,000 - \$299,999	5.0%	7.1%	7.0%
\$300,000 - \$399,999	2.3%	6.0%	7.6%
\$400,000 - \$499,999	0.0%	0.7%	0.6%
\$500,000 - \$749,999	0.2%	0.3%	0.6%
\$750,000 - \$999,999	0.0%	0.6%	0.5%
\$1,000,000 - \$1,499,999	0.0%	0.0%	0.0%
\$1,500,000 - \$1,999,999	0.0%	0.3%	0.2%
\$2,000,000 +	0.6%	0.2%	0.2%
Average Home Value	\$118,983	\$150,513	\$153,362
2026 Owner Occupied Housing Units by Value			
Total	650	4,806	8,443
<\$50,000	18.2%	14.5%	14.2%
\$50,000 - \$99,999	32.8%	20.6%	18.7%
\$100,000 - \$149,999	23.5%	21.0%	18.8%
\$150,000 - \$199,999	8.5%	16.7%	17.4%
\$200,000 - \$249,999	5.8%	8.5%	9.8%
\$250,000 - \$299,999	7.2%	8.9%	9.0%
\$300,000 - \$399,999	3.2%	7.3%	9.7%
\$400,000 - \$499,999	0.0%	0.9%	0.7%
\$500,000 - \$749,999	0.2%	0.4%	0.7%
\$750,000 - \$999,999	0.0%	0.6%	0.5%
\$1,000,000 - \$1,499,999	0.0%	0.0%	0.0%
\$1,500,000 - \$1,999,999	0.0%	0.3%	0.2%
\$2,000,000 +	0.6%	0.2%	0.2%
Average Home Value	\$132,500	\$166,157	\$171,429

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2021 and 2026 Esri converted Census 2000 data into 2010 geography.

June 30, 2021





GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY



Community Profile

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 Rings: 1, 5, 10 mile radii

Prepared by ECG
 Latitude: 31.49689
 Longitude: -82.84565

	1 mile	5 miles	10 miles
2010 Population by Age			
Total	4,685	22,558	34,991
0 - 4	8.5%	8.1%	7.8%
5 - 9	7.4%	7.6%	7.6%
10 - 14	7.0%	7.5%	7.7%
15 - 24	18.1%	15.7%	14.8%
25 - 34	12.7%	12.8%	12.8%
35 - 44	12.6%	12.9%	13.3%
45 - 54	12.7%	12.9%	13.4%
55 - 64	10.4%	11.1%	11.2%
65 - 74	6.5%	6.6%	6.8%
75 - 84	3.1%	3.4%	3.3%
85 +	1.2%	1.4%	1.2%
18 +	72.3%	72.4%	72.3%
2021 Population by Age			
Total	4,850	23,253	36,457
0 - 4	7.4%	7.0%	6.8%
5 - 9	7.3%	7.2%	7.1%
10 - 14	6.9%	6.8%	6.9%
15 - 24	15.4%	13.9%	13.0%
25 - 34	15.0%	14.3%	14.0%
35 - 44	11.7%	12.3%	12.7%
45 - 54	11.5%	11.8%	12.2%
55 - 64	10.4%	11.4%	12.0%
65 - 74	9.0%	9.5%	9.7%
75 - 84	4.2%	4.3%	4.3%
85 +	1.2%	1.4%	1.3%
18 +	74.6%	75.2%	75.5%
2026 Population by Age			
Total	4,861	23,454	36,925
0 - 4	7.2%	6.8%	6.6%
5 - 9	6.8%	6.9%	6.8%
10 - 14	6.7%	7.1%	7.1%
15 - 24	15.8%	13.9%	13.0%
25 - 34	13.0%	12.4%	12.1%
35 - 44	12.8%	12.9%	12.9%
45 - 54	11.2%	11.8%	12.3%
55 - 64	10.1%	11.4%	12.0%
65 - 74	9.5%	9.8%	10.1%
75 - 84	5.5%	5.5%	5.6%
85 +	1.5%	1.6%	1.5%
18 +	75.2%	75.2%	75.4%
2010 Population by Sex			
Males	2,186	10,737	16,877
Females	2,501	11,819	18,112
2021 Population by Sex			
Males	2,310	11,246	17,799
Females	2,539	12,005	18,658
2026 Population by Sex			
Males	2,337	11,428	18,123
Females	2,525	12,028	18,801

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2021 and 2026 Esri converted Census 2000 data into 2010 geography.

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GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY



Community Profile

George Washington Carver Shopping Center
 Gaskin Ave S & E College Park Dr, Douglas, Georgia, 31533
 Rings: 1, 5, 10 mile radii

Prepared by ECG
 Latitude: 31.49689
 Longitude: -82.84565

	1 mile	5 miles	10 miles
2010 Population by Race/Ethnicity			
Total	4,686	22,556	34,990
White Alone	28.7%	56.8%	63.7%
Black Alone	66.2%	33.4%	26.4%
American Indian Alone	0.1%	0.3%	0.3%
Asian Alone	0.4%	0.9%	0.8%
Pacific Islander Alone	0.1%	0.1%	0.0%
Some Other Race Alone	2.8%	7.1%	7.3%
Two or More Races	1.7%	1.5%	1.4%
Hispanic Origin	4.9%	11.2%	11.5%
Diversity Index	52.9	65.3	62.1
2021 Population by Race/Ethnicity			
Total	4,850	23,252	36,457
White Alone	25.2%	52.4%	59.6%
Black Alone	68.6%	35.4%	28.1%
American Indian Alone	0.2%	0.5%	0.5%
Asian Alone	0.5%	1.1%	1.0%
Pacific Islander Alone	0.1%	0.1%	0.0%
Some Other Race Alone	3.4%	8.6%	8.9%
Two or More Races	2.1%	2.0%	1.9%
Hispanic Origin	6.0%	13.7%	14.1%
Diversity Index	52.6	69.5	67.1
2026 Population by Race/Ethnicity			
Total	4,862	23,456	36,924
White Alone	23.6%	50.4%	57.6%
Black Alone	69.5%	36.1%	28.6%
American Indian Alone	0.2%	0.5%	0.5%
Asian Alone	0.5%	1.2%	1.1%
Pacific Islander Alone	0.1%	0.1%	0.0%
Some Other Race Alone	3.7%	9.5%	9.9%
Two or More Races	2.4%	2.3%	2.2%
Hispanic Origin	6.5%	15.2%	15.6%
Diversity Index	52.7	71.5	69.5
2010 Population by Relationship and Household Type			
Total	4,687	22,556	34,989
In Households	93.4%	96.8%	97.8%
In Family Households	79.6%	83.5%	85.5%
Householder	23.7%	25.3%	26.1%
Spouse	11.3%	15.9%	17.6%
Child	37.2%	35.1%	35.0%
Other relative	5.2%	4.7%	4.5%
Nonrelative	2.3%	2.5%	2.4%
In Nonfamily Households	13.8%	13.3%	12.3%
In Group Quarters	6.6%	3.2%	2.2%
Institutionalized Population	4.5%	1.6%	1.2%
Noninstitutionalized Population	2.1%	1.6%	1.0%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2021 and 2026 Esri converted Census 2000 data into 2010 geography.

June 30, 2021





GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY



Community Profile

George Washington Carver Shopping Center
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	1 mile	5 miles	10 miles
2021 Population 25+ by Educational Attainment			
Total	3,058	15,113	24,109
Less than 9th Grade	8.5%	9.3%	8.4%
9th - 12th Grade, No Diploma	15.1%	13.8%	13.5%
High School Graduate	34.4%	29.0%	30.0%
GED/Alternative Credential	7.3%	6.1%	6.0%
Some College, No Degree	20.4%	18.3%	18.0%
Associate Degree	7.8%	7.8%	8.2%
Bachelor's Degree	3.7%	8.9%	9.2%
Graduate/Professional Degree	2.8%	6.6%	6.7%
2021 Population 15+ by Marital Status			
Total	3,804	18,345	28,848
Never Married	48.6%	35.8%	32.7%
Married	24.9%	43.0%	47.4%
Widowed	10.0%	6.7%	6.6%
Divorced	16.5%	14.5%	13.4%
2021 Civilian Population 16+ in Labor Force			
Civilian Population 16+	1,975	10,879	16,963
Population 16+ Employed	95.6%	96.5%	96.2%
Population 16+ Unemployment rate	4.4%	3.5%	3.8%
Population 16-24 Employed	16.9%	16.0%	15.5%
Population 16-24 Unemployment rate	5.6%	5.0%	4.2%
Population 25-54 Employed	64.2%	62.5%	62.3%
Population 25-54 Unemployment rate	5.2%	4.2%	5.0%
Population 55-64 Employed	12.3%	14.4%	14.8%
Population 55-64 Unemployment rate	0.0%	0.1%	0.4%
Population 65+ Employed	6.6%	7.1%	7.4%
Population 65+ Unemployment rate	0.0%	0.0%	0.0%
2021 Employed Population 16+ by Industry			
Total	1,889	10,503	16,312
Agriculture/Mining	1.2%	2.9%	3.7%
Construction	2.2%	6.1%	6.8%
Manufacturing	14.7%	16.8%	16.8%
Wholesale Trade	0.2%	1.8%	2.4%
Retail Trade	12.8%	12.4%	12.4%
Transportation/Utilities	5.9%	5.0%	5.1%
Information	1.2%	0.9%	0.8%
Finance/Insurance/Real Estate	0.3%	1.9%	2.5%
Services	49.3%	45.4%	43.7%
Public Administration	12.3%	6.8%	5.8%
2021 Employed Population 16+ by Occupation			
Total	1,889	10,504	16,312
White Collar	47.5%	51.7%	53.0%
Management/Business/Financial	5.0%	11.9%	12.9%
Professional	20.7%	20.9%	21.2%
Sales	10.0%	8.9%	9.7%
Administrative Support	11.9%	10.0%	9.2%
Services	21.2%	17.1%	15.2%
Blue Collar	31.3%	31.2%	31.8%
Farming/Forestry/Fishing	0.5%	1.2%	1.5%
Construction/Extraction	1.5%	4.4%	5.1%
Installation/Maintenance/Repair	0.2%	1.4%	1.7%
Production	10.3%	9.4%	9.9%
Transportation/Material Moving	18.7%	14.8%	13.6%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2021 and 2026 Esri converted Census 2000 data into 2010 geography.

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	1 mile	5 miles	10 miles
2010 Households by Type			
Total	1,560	8,263	12,707
Households with 1 Person	29.9%	26.4%	24.2%
Households with 2+ People	70.1%	73.6%	75.8%
Family Households	66.4%	69.3%	71.6%
Husband-wife Families	30.9%	43.5%	48.4%
With Related Children	14.6%	20.5%	23.1%
Other Family (No Spouse Present)	35.5%	25.8%	23.3%
Other Family with Male Householder	5.2%	5.2%	5.3%
With Related Children	2.4%	2.9%	2.9%
Other Family with Female Householder	30.3%	20.5%	18.0%
With Related Children	22.0%	14.7%	12.7%
Nonfamily Households	3.7%	4.3%	4.1%
All Households with Children	39.4%	38.6%	39.3%
Multigenerational Households	7.9%	5.8%	5.6%
Unmarried Partner Households	7.2%	6.4%	6.1%
Male-female	6.5%	5.7%	5.4%
Same-sex	0.8%	0.7%	0.7%
2010 Households by Size			
Total	1,559	8,263	12,706
1 Person Household	29.9%	26.4%	24.2%
2 Person Household	25.8%	29.7%	30.6%
3 Person Household	18.7%	17.4%	18.0%
4 Person Household	13.3%	14.2%	14.6%
5 Person Household	6.9%	7.4%	7.7%
6 Person Household	3.1%	3.0%	3.0%
7 + Person Household	2.2%	1.9%	1.9%
2010 Households by Tenure and Mortgage Status			
Total	1,560	8,264	12,707
Owner Occupied	46.9%	61.4%	67.4%
Owned with a Mortgage/Loan	28.6%	35.2%	37.8%
Owned Free and Clear	18.3%	26.2%	29.6%
Renter Occupied	53.1%	38.6%	32.6%
2021 Affordability, Mortgage and Wealth			
Housing Affordability Index	159	185	184
Percent of Income for Mortgage	14.6%	12.4%	12.5%
Wealth Index	24	48	53
2010 Housing Units By Urban/ Rural Status			
Total Housing Units	1,812	9,466	14,547
Housing Units Inside Urbanized Area	0.0%	0.0%	0.0%
Housing Units Inside Urbanized Cluster	85.3%	59.8%	41.2%
Rural Housing Units	14.7%	40.2%	58.8%
2010 Population By Urban/ Rural Status			
Total Population	4,687	22,556	34,989
Population Inside Urbanized Area	0.0%	0.0%	0.0%
Population Inside Urbanized Cluster	84.1%	59.1%	40.3%
Rural Population	15.9%	40.9%	59.7%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2021 and 2026 Esri converted Census 2000 data into 2010 geography.

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GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY



Community Profile

George Washington Carver Shopping Center
Gaskin Ave S & E College Park Dr, Douglas, Georgia, 31533
Rings: 1, 5, 10 mile radii

Prepared by ECG
Latitude: 31.49689
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	1 mile	5 miles	10 miles
Top 3 Tapestry Segments			
1.	Modest Income Homes (12D)	Down the Road (10D)	Southern Satellites (10A)
2.	Rural Bypasses (10E)	Rural Bypasses (10E)	Down the Road (10D)
3.	Traditional Living (12B)	Southern Satellites (10A)	Rural Bypasses (10E)
2021 Consumer Spending			
Apparel & Services: Total \$	\$1,343,519	\$10,999,734	\$17,966,866
Average Spent	\$855.74	\$1,300.05	\$1,362.98
Spending Potential Index	40	61	64
Education: Total \$	\$922,129	\$7,325,095	\$11,971,460
Average Spent	\$587.34	\$865.75	\$908.17
Spending Potential Index	34	50	53
Entertainment/Recreation: Total \$	\$2,088,461	\$17,694,977	\$29,060,800
Average Spent	\$1,330.23	\$2,091.36	\$2,204.58
Spending Potential Index	41	65	68
Food at Home: Total \$	\$3,650,252	\$30,735,319	\$50,087,045
Average Spent	\$2,325.00	\$3,632.59	\$3,799.65
Spending Potential Index	43	67	70
Food Away from Home: Total \$	\$2,399,218	\$20,133,405	\$32,928,656
Average Spent	\$1,528.16	\$2,379.55	\$2,498.00
Spending Potential Index	40	63	66
Health Care: Total \$	\$4,296,523	\$36,375,065	\$59,960,796
Average Spent	\$2,736.64	\$4,299.14	\$4,548.69
Spending Potential Index	44	69	73
HH Furnishings & Equipment: Total \$	\$1,411,915	\$12,001,029	\$19,762,112
Average Spent	\$899.31	\$1,418.39	\$1,499.17
Spending Potential Index	40	63	66
Personal Care Products & Services: Total \$	\$562,410	\$4,634,908	\$7,587,454
Average Spent	\$358.22	\$547.80	\$575.59
Spending Potential Index	40	61	64
Shelter: Total \$	\$11,818,468	\$95,880,819	\$155,762,770
Average Spent	\$7,527.69	\$11,332.09	\$11,816.32
Spending Potential Index	37	56	59
Support Payments/Cash Contributions/Gifts in Kind: Total \$	\$1,462,461	\$13,066,987	\$21,540,077
Average Spent	\$931.50	\$1,544.38	\$1,634.05
Spending Potential Index	39	65	68
Travel: Total \$	\$1,406,141	\$11,954,882	\$19,763,742
Average Spent	\$895.63	\$1,412.94	\$1,499.30
Spending Potential Index	35	56	59
Vehicle Maintenance & Repairs: Total \$	\$769,245	\$6,487,139	\$10,567,189
Average Spent	\$489.96	\$766.71	\$801.64
Spending Potential Index	44	69	72

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2018 and 2019 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2021 and 2026 Esri converted Census 2000 data into 2010 geography.

June 30, 2021





GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY

RETAIL MARKETPLACE PROFILE

This report compares the estimated spending by local residents (Demand / Retail Potential) to the total sales estimated for local businesses (Supply / Retail Sales). For some store types, local businesses may sell more than local residents, which suggests that outsiders are coming into the area to shop in these businesses (negative retail gap / retail surplus). In other categories, residents spend more than local stores sell suggesting that residents are shopping and dining outside the area (positive retail gap / retail leakage).



Retail Marketplace Profile

George Washington Carver Shopping Center
Gaskin Ave S & E College Park Dr, Douglas, Georgia, 31533
Ring: 1 mile radius

Prepared by ECG
Latitude: 31.49689
Longitude: -82.84565

This area, the 1-mile radius of George Washington Shopping Center, contains 3.14 square miles, 4,850 people, 1,570 households, and a median disposable income of \$22,494.

Example: In this area, there are 40 food and drink businesses that collectively do \$23,203,358 in sales. Residents in this area spend \$2,618,881 on food and drink. The negative retail gap indicates that there is a surplus of sales in this area (i.e. more sales than can be accounted for by resident spending). The retail surplus indicates that this area is a draw for non-residents to engage in retail and food and drink spending in the area.

While, in general, this area has a retail surplus (negative retail gap), there are three industry sectors that have retail leakages (positive retail gaps), Electronic Shopping & Mail-Order Houses (NAICS 4541), Special Food Places (NAICS 7223), and Drinking Places – Alcoholic Beverages (NAICS 7224). The retail leakages in these sectors indicate that residents have excess demand and new businesses in these sectors may be justified.

Summary Demographics

2021 Population	4,850
2021 Households	1,570
2021 Median Disposable Income	\$22,494
2021 Per Capita Income	\$13,569

NOTE: This database is in mature status. While the data are presented in current year geography, all supply- and demand-related estimates remain vintage 2017.

2017 Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$29,589,705	\$205,533,745	-\$175,944,040	-74.8	153
Total Retail Trade	44-45	\$26,970,825	\$182,330,388	-\$155,359,563	-74.2	113
Total Food & Drink	722	\$2,618,881	\$23,203,358	-\$20,584,477	-79.7	40
2017 Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$5,961,704	\$49,499,136	-\$43,537,432	-78.5	20
Automobile Dealers	4411	\$4,935,627	\$39,336,427	-\$34,400,800	-77.7	10
Other Motor Vehicle Dealers	4412	\$497,017	\$1,700,307	-\$1,203,290	-54.8	2
Auto Parts, Accessories & Tire Stores	4413	\$529,061	\$8,462,402	-\$7,933,341	-88.2	8
Furniture & Home Furnishings Stores	442	\$962,432	\$3,890,196	-\$2,927,764	-60.3	6
Furniture Stores	4421	\$531,864	\$1,658,172	-\$1,126,308	-51.4	3
Home Furnishings Stores	4422	\$430,568	\$2,232,024	-\$1,801,456	-67.7	3
Electronics & Appliance Stores	443	\$859,059	\$7,564,876	-\$6,705,817	-79.6	4
Bldg Materials, Garden Equip. & Supply Stores	444	\$1,660,554	\$14,630,502	-\$12,969,948	-79.6	6
Bldg Material & Supplies Dealers	4441	\$1,557,839	\$12,041,663	-\$10,483,824	-77.1	3
Lawn & Garden Equip & Supply Stores	4442	\$102,715	\$2,588,839	-\$2,486,124	-92.4	3
Food & Beverage Stores	445	\$4,714,573	\$13,826,865	-\$9,112,292	-49.1	14
Grocery Stores	4451	\$4,172,678	\$11,530,428	-\$7,357,750	-46.9	10
Specialty Food Stores	4452	\$274,502	\$1,013,170	-\$738,668	-57.4	3
Beer, Wine & Liquor Stores	4453	\$267,392	\$1,283,268	-\$1,015,876	-65.5	2
Health & Personal Care Stores	446,4461	\$1,738,872	\$19,228,059	-\$17,489,187	-83.4	8
Gasoline Stations	447,4471	\$3,358,015	\$8,905,157	-\$5,547,142	-45.2	5
Clothing & Clothing Accessories Stores	448	\$1,178,607	\$8,260,818	-\$7,082,211	-75.0	17
Clothing Stores	4481	\$802,605	\$4,803,595	-\$4,000,990	-71.4	10
Shoe Stores	4482	\$185,378	\$2,125,736	-\$1,940,358	-84.0	3
Jewelry, Luggage & Leather Goods Stores	4483	\$190,624	\$1,331,487	-\$1,140,863	-75.0	3
Sporting Goods, Hobby, Book & Music Stores	451	\$672,121	\$3,578,125	-\$2,906,004	-68.4	6
Sporting Goods/Hobby/Musical Instr Stores	4511	\$579,013	\$3,342,474	-\$2,763,461	-70.5	5
Book, Periodical & Music Stores	4512	\$93,108	\$235,651	-\$142,543	-43.4	1
General Merchandise Stores	452	\$4,555,853	\$42,205,732	-\$37,649,879	-80.5	11
Department Stores Excluding Leased Depts.	4521	\$3,241,940	\$38,588,661	-\$35,346,721	-84.5	6
Other General Merchandise Stores	4529	\$1,313,913	\$3,617,072	-\$2,303,159	-46.7	5
Miscellaneous Store Retailers	453	\$955,796	\$7,595,817	-\$6,640,021	-77.6	15
Florists	4531	\$30,121	\$576,526	-\$546,405	-90.1	2
Office Supplies, Stationery & Gift Stores	4532	\$167,927	\$390,075	-\$222,148	-39.8	4
Used Merchandise Stores	4533	\$144,886	\$534,259	-\$389,373	-57.3	5
Other Miscellaneous Store Retailers	4539	\$612,861	\$6,094,957	-\$5,482,096	-81.7	4
Nonstore Retailers	454	\$353,239	\$3,145,104	-\$2,791,865	-79.8	2
Electronic Shopping & Mail-Order Houses	4541	\$227,030	\$0	\$227,030	100.0	0
Vending Machine Operators	4542	\$20,731	\$1,804,813	-\$1,784,082	-97.7	2
Direct Selling Establishments	4543	\$105,478	\$959,881	-\$854,403	-80.2	1
Food Services & Drinking Places	722	\$2,618,881	\$23,203,358	-\$20,584,477	-79.7	40
Special Food Services	7223	\$28,169	\$0	\$28,169	100.0	0
Drinking Places - Alcoholic Beverages	7224	\$58,665	\$0	\$58,665	100.0	0
Restaurants/Other Eating Places	7225	\$2,532,046	\$23,189,834	-\$20,657,788	-80.3	40

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents "leakage" or retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail Marketplace data, please click the link below to view the Methodology Statement.

<http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

Source: Esri and Data Axle. Esri 2021 Updated Demographics. Esri 2017 Retail Marketplace. ©2021 Esri. ©2017 Data Axle, Inc. All rights reserved.

June 30, 2021





GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY



Retail MarketPlace Profile

George Washington Carver Shopping Center
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Ring: 5 mile radius

Prepared by ECG
Latitude: 31.49689
Longitude: -82.84565

Summary Demographics

2021 Population	23,251
2021 Households	8,461
2021 Median Disposable Income	\$33,711
2021 Per Capita Income	\$20,470

NOTE: This database is in mature status. While the data are presented in current year geography, all supply- and demand-related estimates remain vintage 2017.

2017 Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$216,407,567	\$455,126,508	-\$238,718,941	-35.5	307
Total Retail Trade	44-45	\$197,424,409	\$414,471,990	-\$217,047,581	-35.5	236
Total Food & Drink	722	\$18,983,158	\$40,654,517	-\$21,671,359	-36.3	71
2017 Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$44,093,062	\$89,895,103	-\$45,802,041	-34.2	45
Automobile Dealers	4411	\$36,487,476	\$72,153,372	-\$35,665,896	-32.8	26
Other Motor Vehicle Dealers	4412	\$3,760,389	\$4,664,281	-\$903,892	-10.7	5
Auto Parts, Accessories & Tire Stores	4413	\$3,845,197	\$13,077,451	-\$9,232,254	-54.6	15
Furniture & Home Furnishings Stores	442	\$6,966,551	\$10,664,434	-\$3,697,883	-21.0	11
Furniture Stores	4421	\$3,764,836	\$6,858,281	-\$3,093,445	-29.1	6
Home Furnishings Stores	4422	\$3,201,715	\$3,806,153	-\$604,438	-8.6	5
Electronics & Appliance Stores	443	\$6,173,860	\$8,555,708	-\$2,381,848	-16.2	5
Bldg Materials, Garden Equip. & Supply Stores	444	\$12,984,917	\$29,634,397	-\$16,649,480	-39.1	18
Bldg Material & Supplies Dealers	4441	\$12,209,408	\$23,894,669	-\$11,685,261	-32.4	10
Lawn & Garden Equip & Supply Stores	4442	\$775,509	\$5,739,728	-\$4,964,219	-76.2	8
Food & Beverage Stores	445	\$33,925,406	\$48,832,274	-\$14,906,868	-18.0	32
Grocery Stores	4451	\$30,036,082	\$43,932,727	-\$13,896,645	-18.8	24
Specialty Food Stores	4452	\$1,970,290	\$2,219,857	-\$249,567	-6.0	4
Beer, Wine & Liquor Stores	4453	\$1,919,034	\$2,679,690	-\$760,656	-16.5	4
Health & Personal Care Stores	446,4461	\$12,677,452	\$45,368,349	-\$32,690,897	-56.3	21
Gasoline Stations	447,4471	\$24,509,055	\$29,947,155	-\$5,438,100	-10.0	15
Clothing & Clothing Accessories Stores	448	\$8,553,427	\$10,575,010	-\$2,021,583	-10.6	22
Clothing Stores	4481	\$5,829,761	\$6,550,991	-\$721,230	-5.8	14
Shoe Stores	4482	\$1,359,344	\$2,420,563	-\$1,061,219	-28.1	4
Jewelry, Luggage & Leather Goods Stores	4483	\$1,364,322	\$1,603,456	-\$239,134	-8.1	4
Sporting Goods, Hobby, Book & Music Stores	451	\$4,914,075	\$5,142,063	-\$227,988	-2.3	10
Sporting Goods/Hobby/Musical Instr Stores	4511	\$4,265,333	\$4,891,767	-\$626,434	-6.8	9
Book, Periodical & Music Stores	4512	\$648,742	\$250,296	\$398,446	44.3	1
General Merchandise Stores	452	\$33,025,778	\$55,504,965	-\$22,479,187	-25.4	18
Department Stores Excluding Leased Depts.	4521	\$23,537,586	\$48,073,131	-\$24,535,545	-34.3	7
Other General Merchandise Stores	4529	\$9,488,192	\$7,431,834	\$2,056,358	12.2	11
Miscellaneous Store Retailers	453	\$7,019,698	\$72,095,269	-\$65,075,571	-82.3	32
Florists	4531	\$221,594	\$716,597	-\$495,003	-52.8	3
Office Supplies, Stationery & Gift Stores	4532	\$1,220,236	\$1,225,687	-\$5,451	-0.2	7
Used Merchandise Stores	4533	\$1,012,959	\$814,396	\$198,563	10.9	8
Other Miscellaneous Store Retailers	4539	\$4,564,908	\$69,338,590	-\$64,773,682	-87.6	13
Nonstore Retailers	454	\$2,581,125	\$8,257,264	-\$5,676,139	-52.4	6
Electronic Shopping & Mail-Order Houses	4541	\$1,641,283	\$1,141,230	\$500,053	18.0	1
Vending Machine Operators	4542	\$149,096	\$2,260,081	-\$2,110,985	-87.6	2
Direct Selling Establishments	4543	\$790,746	\$4,855,953	-\$4,065,207	-72.0	3
Food Services & Drinking Places	722	\$18,983,158	\$40,654,517	-\$21,671,359	-36.3	71
Special Food Services	7223	\$203,717	\$308,624	-\$104,907	-20.5	2
Drinking Places - Alcoholic Beverages	7224	\$407,280	\$0	\$407,280	100.0	0
Restaurants/Other Eating Places	7225	\$18,372,161	\$40,345,893	-\$21,973,732	-37.4	69

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.

<http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

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June 30, 2021

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This area, the 5-mile radius of George Washington Shopping Center, contains 78.5 square miles, 23,251 people, 8,461 households, and a median disposable income of \$33,711.

This area still has a negative retail gap (retail surplus). The retail surplus indicates that this area is a draw for non-residents to engage in retail and food and drink spending in the area.

Despite the general retail surplus in the area, there are five industry sectors with retail leakages (positive retail gaps): Book, Periodical, and Music Stores (NAICS 4512), Other General Merchandise Stores (NAICS 4529), Used Merchandise Stores (NAICS 4533), Electronic Shopping & Mail-Order Houses (NAICS 4541), and Drinking Places - Alcoholic Beverages (NAICS 7224). The retail leakages in these sectors indicate that residents have excess demand and new businesses in these sectors may be justified.



GEORGE WASHINGTON CARVER SHOPPING CENTER FEASIBILITY STUDY



Retail MarketPlace Profile

George Washington Carver Shopping Center
Gaskin Ave S & E College Park Dr, Douglas, Georgia, 31533
Ring: 10 mile radius

Prepared by ECG
Latitude: 31.49689
Longitude: -82.84565

This area, the 10-mile radius of George Washington Shopping Center, contains 314 square miles, 36,457 people, 13,182 households, and a median disposable income of \$35,179.

Summary Demographics

2021 Population	36,457
2021 Households	13,182
2021 Median Disposable Income	\$35,179
2021 Per Capita Income	\$21,519

NOTE: This database is in mature status. While the data are presented in current year geography, all supply- and demand-related estimates remain vintage 2017.

2017 Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$352,863,522	\$483,379,671	-\$130,516,149	-15.6	344
Total Retail Trade	44-45	\$321,896,755	\$441,375,140	-\$119,478,385	-15.7	268
Total Food & Drink	722	\$30,966,767	\$42,004,531	-\$11,037,764	-15.1	77

This area has an overall negative retail gap (retail surplus). The retail surplus indicates that this area is a draw for non-residents to engage in retail and food and drink spending in the area.

2017 Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$72,174,239	\$93,896,286	-\$21,722,047	-13.1	52
Automobile Dealers	4411	\$59,724,975	\$74,092,723	-\$14,367,748	-10.7	27
Other Motor Vehicle Dealers	4412	\$6,191,821	\$5,425,564	\$766,257	6.6	7
Auto Parts, Accessories & Tire Stores	4413	\$6,257,443	\$14,377,999	-\$8,120,556	-39.4	17
Furniture & Home Furnishings Stores	442	\$11,430,473	\$10,664,434	\$766,039	3.5	11
Furniture Stores	4421	\$6,137,148	\$6,858,281	-\$721,133	-5.5	6
Home Furnishings Stores	4422	\$5,293,325	\$3,806,153	\$1,487,172	16.3	5
Electronics & Appliance Stores	443	\$10,017,414	\$8,582,542	\$1,434,872	7.7	5
Bldg Materials, Garden Equip. & Supply Stores	444	\$21,621,904	\$30,494,079	-\$8,872,175	-17.0	22
Bldg Material & Supplies Dealers	4441	\$20,338,685	\$24,004,763	-\$3,666,078	-8.3	11
Lawn & Garden Equip & Supply Stores	4442	\$1,283,219	\$6,489,316	-\$5,206,097	-67.0	11
Food & Beverage Stores	445	\$54,947,427	\$57,305,914	-\$2,358,487	-2.1	40
Grocery Stores	4451	\$48,644,585	\$51,109,947	-\$2,465,362	-2.5	30
Specialty Food Stores	4452	\$3,186,839	\$2,463,169	\$723,670	12.8	5
Beer, Wine & Liquor Stores	4453	\$3,116,002	\$3,732,799	-\$616,797	-9.0	5
Health & Personal Care Stores	446,4461	\$20,678,470	\$46,479,027	-\$25,800,557	-38.4	22
Gasoline Stations	447,4471	\$39,753,307	\$39,136,096	\$617,211	0.8	21
Clothing & Clothing Accessories Stores	448	\$13,936,574	\$10,731,011	\$3,205,563	13.0	23
Clothing Stores	4481	\$9,491,472	\$6,706,992	\$2,784,480	17.2	15
Shoe Stores	4482	\$2,215,323	\$2,420,563	-\$205,240	-4.4	4
Jewelry, Luggage & Leather Goods Stores	4483	\$2,229,779	\$1,603,456	\$626,323	16.3	4
Sporting Goods, Hobby, Book & Music Stores	451	\$8,007,437	\$5,539,082	\$2,468,355	18.2	11
Sporting Goods/Hobby/Musical Instr Stores	4511	\$6,960,645	\$5,288,786	\$1,671,859	13.6	10
Book, Periodical & Music Stores	4512	\$1,046,793	\$250,296	\$796,497	61.4	1
General Merchandise Stores	452	\$53,687,825	\$57,567,661	-\$3,879,836	-3.5	22
Department Stores Excluding Leased Depts.	4521	\$38,303,498	\$48,073,131	-\$9,769,633	-11.3	7
Other General Merchandise Stores	4529	\$15,384,327	\$9,494,530	\$5,889,797	23.7	15
Miscellaneous Store Retailers	453	\$11,431,396	\$72,404,732	-\$60,973,336	-72.7	33
Florists	4531	\$368,420	\$716,597	-\$348,177	-32.1	3
Office Supplies, Stationery & Gift Stores	4532	\$1,989,785	\$1,290,346	\$699,439	21.3	8
Used Merchandise Stores	4533	\$1,637,414	\$870,804	\$766,610	30.6	8
Other Miscellaneous Store Retailers	4539	\$7,435,777	\$69,526,985	-\$62,091,208	-80.7	14
Nonstore Retailers	454	\$4,210,288	\$8,574,274	-\$4,363,986	-34.1	6
Electronic Shopping & Mail-Order Houses	4541	\$2,666,975	\$1,458,240	\$1,208,735	29.3	1
Vending Machine Operators	4542	\$241,598	\$2,260,081	-\$2,018,483	-80.7	2
Direct Selling Establishments	4543	\$1,301,715	\$4,855,953	-\$3,554,238	-57.7	3
Food Services & Drinking Places	722	\$30,966,767	\$42,004,531	-\$11,037,764	-15.1	77
Special Food Services	7223	\$335,395	\$308,624	\$26,771	4.2	2
Drinking Places - Alcoholic Beverages	7224	\$658,008	\$0	\$658,008	100.0	0
Restaurants/Other Eating Places	7225	\$29,973,365	\$41,695,907	-\$11,722,542	-16.4	75

Despite the general retail surplus in the area, there are 15 industry sectors with retail leakages (positive retail gaps). These sectors are highlighted. The retail leakages in these sectors indicate that residents have excess demand and new businesses in these sectors may be justified.

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents "leakage" of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.

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June 30, 2021





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