

Market Void Analysis



Commercial Real Estate Services, Worldwide.

TARGETED TRADE AREAS VOID OF WALGREENS LOCATIONS WITH SELECTED MAJOR RETAILER LOCATIONS

- Legend**
- | | | |
|--------------------|----------------------|--------------------|
| Major Retailers | Targeted Trade Areas | Airports |
| ● Walgreens | □ Map Grid | ■ Cities and Towns |
| ● CVS | — Interstates | ■ Water |
| ■ Albertsons | — Toll Roads | |
| ■ Publix | — Western Beltway | |
| ■ Winn-Dixie | — US Highways | |
| ▲ BJ's | — State Highways | |
| ▲ Costco | — County Highways | |
| ▲ Sam's Club | — Major Roads | |
| ▲ Target | □ Counties | |
| ▲ Wal-Mart | — Local Roads | |
| ● Future Walgreens | | |

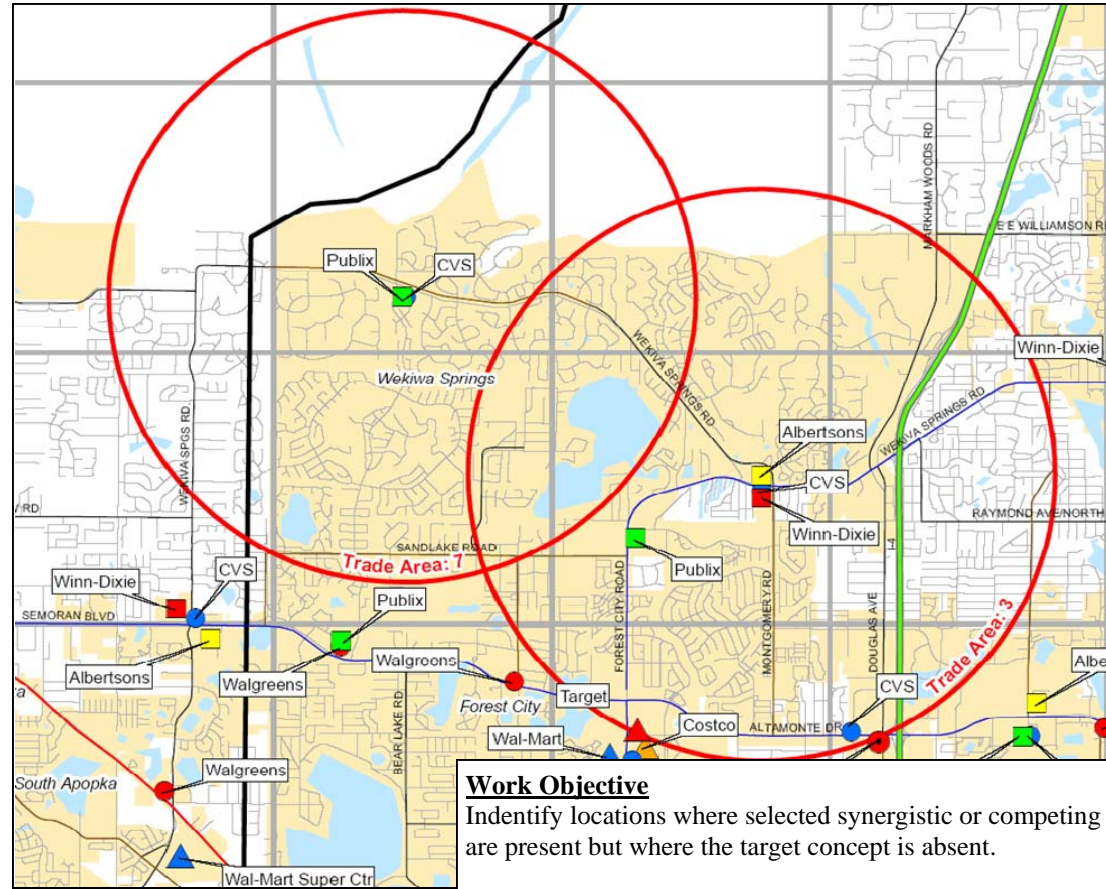
NOTE: A targeted trade area is defined as a two mile radius around any existing major grocery store or CVS drug store location that does not also contain a Walgreens location.



Sources: Internet Research
Date: March 31, 2006
Project: mg06_000343



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Work Objective

Identify locations where selected synergistic or competing uses are present but where the target concept is absent.

Client

Walgreens (NAI Realvest - Orlando, FL)

Deliverables

- Market level map showing the locations of target use, competitors and synergistic uses with market voids identified.
- Report that enumerates which uses are present within each market void.
- Spreadsheet that provides details for each identified market void.

2 MILE TRADE AREAS AROUND MAJOR GROCER AND CVS LOCATIONS THAT ARE VOID OF WALGREENS

Orange, Seminole and Osceola Counties, Florida
18-Mar-06

Trade Area	Map Col	Map Row	Albertsons	BJ's	CVS	Publix	Sam's Club	Target
Trade Area: 1	10	13	1		2		1	1
Trade Area: 2	1	12		1	1	1	1	1
Trade Area: 3	6	9	1		2	1		1
Trade Area: 4	6	13	1		2	2		
Trade Area: 5	6	13	1		2	1		
Trade Area: 6	9	16			1	1		
Trade Area: 7	5	8			1	1		
Trade Area: 8	9	11				1		
Grand Total			4	1	11	8	2	3

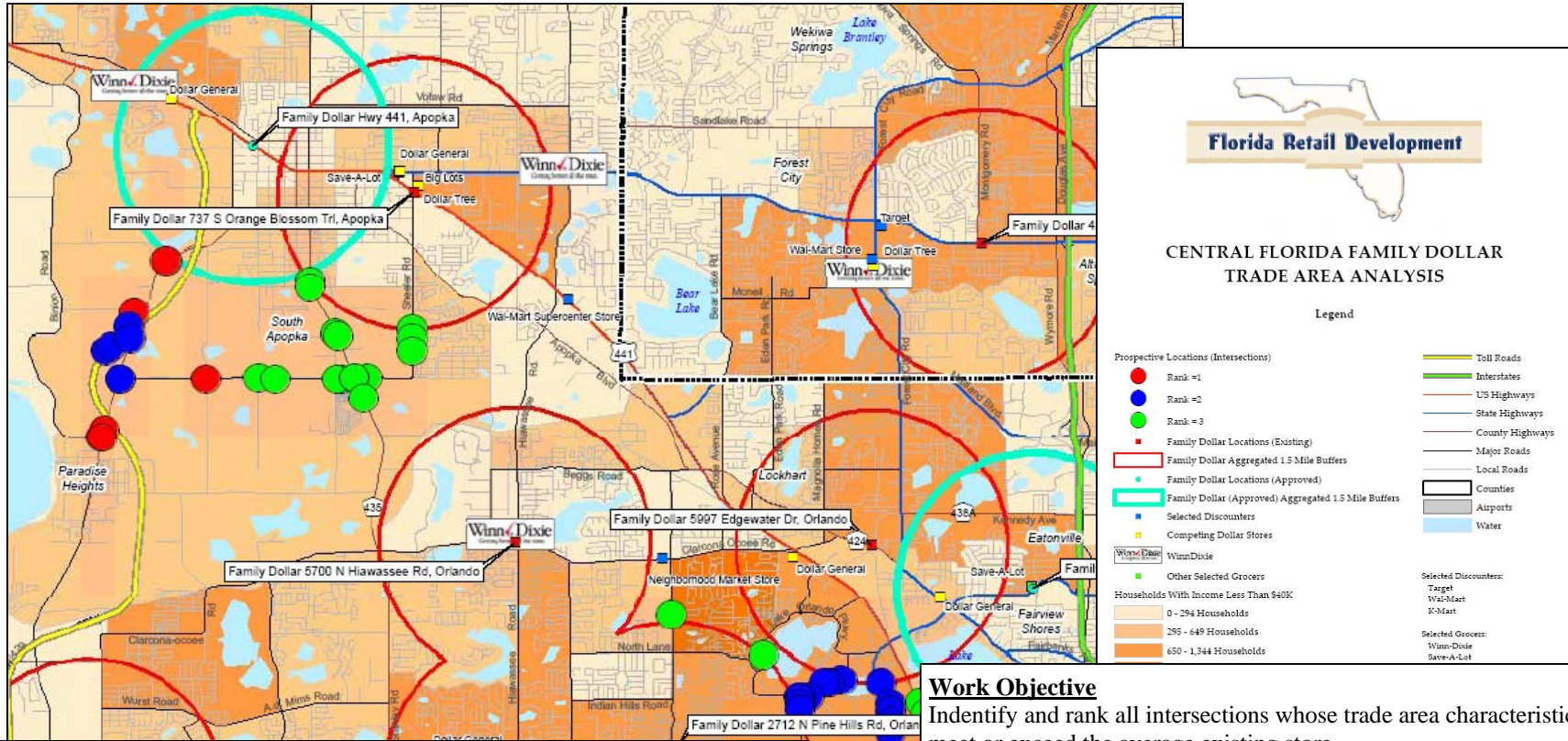


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Analog Analysis



SiteID	Black	BlackPct	Hisp	HispPct	POP	HH	ILT40	ILT40PCT	ILT50	ILT50PCT	CNTDOLLAR	CNT
171798	28363	0.83	2243	0.07	34277	12244	7835	0.64	9065	0.74	1	1
172043	26919	0.83	2057	0.06	32350	11567	7408	0.64	8556	0.74	1	1
173652	28363	0.83	2243	0.07	34277	12244	7835	0.64	9065	0.74	1	1
175688	26919	0.83	2057	0.06	32350	11567	7408	0.64	8556	0.74	1	1
152103	27643	0.82	2361	0.07	33858	12205	7710	0.63	8933	0.73	0	0
155522	27643	0.82	2361	0.07	33858	12205	7710	0.63	8933	0.73	0	0
173702	27643	0.82	2361	0.07	33858	12205	7710	0.63	8933	0.73	0	0
174763	27854	0.82	2279	0.07	34004	12238	7703	0.63	8943	0.73	1	1
154426	26396	0.81	2285	0.07	32571	11973	7602	0.63	8814	0.74	0	0
154677	26970	0.81	2372	0.07	33226	12246	7859	0.64	9080	0.74	0	0
155215	26970	0.81	2372	0.07	33226	12246	7859	0.64	9080	0.74	0	0
172045	27273	0.8	3459	0.1	33973	11622	7342	0.63	8518	0.73	1	1
173295	27273	0.8	3459	0.1	33973	11622	7342	0.63	8518	0.73	1	1
174388	27802	0.79	3583	0.1	35028	11992	7530	0.63	8763	0.73	1	1
175706	27802	0.79	3583	0.1	35028	11992	7530	0.63	8763	0.73	1	1
153871	25814	0.78	2394	0.07	33202	12192	7712	0.63	9008	0.74	0	0
170572	20467	0.78	2252	0.09	26130	9168	5862	0.64	6727	0.73	1	1
171739	28482	0.78	2376	0.07	36341	13193	8121	0.62	9459	0.72	1	1
171780	28482	0.78	2376	0.07	36341	13193	8121	0.62	9459	0.72	1	1
172224	27933	0.78	3768	0.11	35839	12305	7799	0.63	9044	0.73	2	2
173306	27933	0.78	3768	0.11	35839	12305	7799	0.63	9044	0.73	2	2
173589	27933	0.78	3768	0.11	35839	12305	7799	0.63	9044	0.73	3	3
175356	28482	0.78	2376	0.07	36341	13193	8121	0.62	9459	0.72	1	1

Work Objective

Identify and rank all intersections whose trade area characteristics meet or exceed the average existing store.

Client

Family Dollar (Florida Retail Development - Orlando, FL)

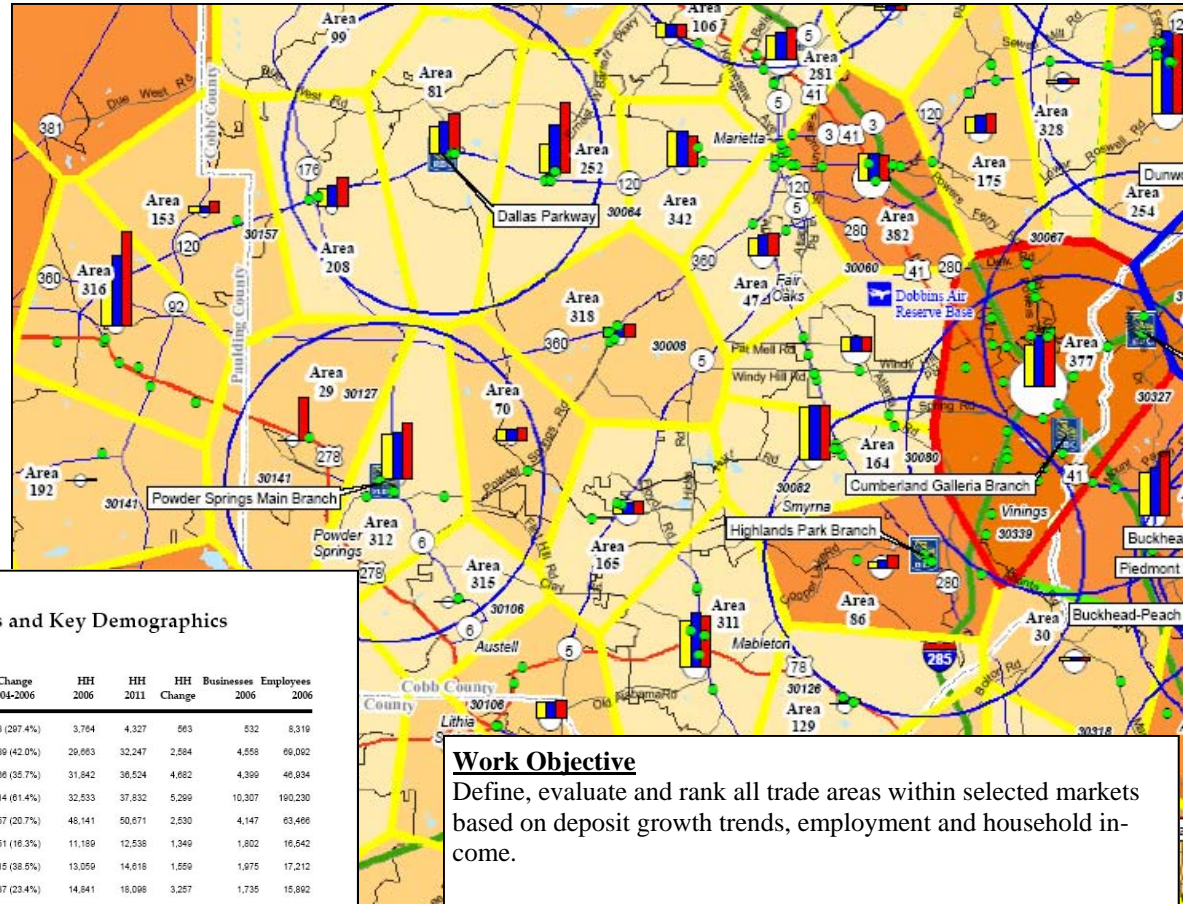
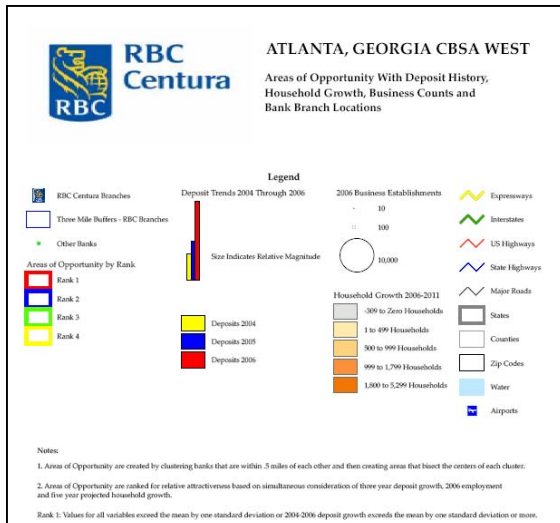
Deliverables

- Whole market maps showing ranked trade areas and supporting data.
- Reports containing details for ranked areas.
- Spreadsheet that provides details for ranked areas.
- Detailed maps and companion reports for trade areas that were selected for additional consideration.



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Trade Area Potential Analysis



RBC Centura
Area of Opportunity Bank Deposits and Key Demographics
Atlanta, Georgia

Map ID	Rank	Deposits 2004	Deposits 2005	Deposits 2006	Change 2004-2005	Change 2005-2006	Change 2004-2006	HH 2006	HH 2011	HH Change	Businesses 2006	Employees 2006
257	1	\$666,627	\$29,216	\$2,780,185	(\$670,311) (-65.8%)	\$2,750,669 (9,416.0%)	\$2,080,658 (297.4%)	3,764	4,327	863	532	6,319
377	1	\$2,311,830	\$2,854,500	\$3,281,719	\$542,670 (23.5%)	\$427,219 (15.0%)	\$969,889 (42.0%)	29,653	32,247	2,584	4,558	66,092
393	1	\$4,068,413	\$4,671,213	\$5,562,379	\$572,800 (14.0%)	\$891,166 (19.1%)	\$1,463,966 (35.7%)	31,842	36,524	4,682	4,399	46,834
408	1	\$23,632,147	\$31,168,536	\$37,969,761	\$7,636,389 (32.5%)	\$6,801,225 (21.8%)	\$14,437,614 (61.4%)	32,533	37,832	5,299	10,307	190,230
241	2	\$660,670	\$622,529	\$1,039,027	\$61,859 (7.2%)	\$116,496 (12.8%)	\$178,357 (20.7%)	46,141	50,671	2,530	4,147	63,466
280	2	\$600,289	\$672,900	\$668,140	\$72,611 (12.1%)	\$25,240 (3.8%)	\$97,851 (16.3%)	11,189	12,538	1,349	1,802	16,642
314	2	\$759,860	\$883,596	\$1,052,565	\$123,716 (16.3%)	\$168,969 (19.1%)	\$292,715 (38.5%)	13,059	14,618	1,559	1,975	17,212
330	2	\$795,080	\$851,131	\$981,417	\$56,051 (7.0%)	\$130,286 (15.3%)	\$186,337 (23.4%)	14,841	16,098	3,257	1,735	16,892
350	2	\$987,420	\$1,071,657	\$1,152,804	\$84,237 (8.5%)	\$81,147 (7.6%)	\$165,384 (16.7%)	9,001	10,562	1,561	1,606	19,315
359	2	\$1,178,899	\$1,256,551	\$1,263,141	\$77,652 (6.6%)	\$6,590 (0.5%)	\$84,242 (7.1%)	10,993	12,399	1,406	1,711	20,819
361	2	\$2,161,644	\$2,284,955	\$2,377,657	\$123,311 (5.7%)	\$92,702 (4.1%)	\$216,013 (10.0%)	45,881	48,454	2,773	6,138	79,082
385	2	\$665,382	\$761,417	\$887,634	\$96,025 (14.4%)	\$126,217 (16.8%)	\$222,242 (33.4%)	14,785	17,763	2,968	1,601	16,849
394	2	\$740,007	\$761,378	\$863,574	\$21,371 (2.9%)	\$102,196 (13.4%)	\$123,667 (16.7%)	14,659	16,463	1,824	2,774	33,297
405	2	\$1,158,685	\$1,197,677	\$1,236,491	\$38,992 (3.4%)	\$38,814 (3.2%)	\$77,806 (6.7%)	17,127	20,620	3,793	2,118	27,637
6	3	\$558,661	\$633,411	\$802,752	\$74,730 (13.4%)	\$169,341 (26.7%)	\$244,071 (43.7%)	9,240	10,135	895	1,452	10,661
78	3	\$160,196	\$229,863	\$285,755	\$39,667 (20.9%)	\$95,892 (24.3%)	\$56,225 (24.3%)	6,737	7,404	667	619	5,684
94	3	\$919,203	\$889,339	\$1,010,414	(\$29,864) (-3.2%)	\$121,075 (13.6%)	\$91,211 (9.9%)	23,224	24,397	1,173	1,957	21,288

* in 000's of dollars
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Monday, March 19, 2007

GENOA

Work Objective

Define, evaluate and rank all trade areas within selected markets based on deposit growth trends, employment and household income.

Client

RBC Centura Bank (Genoa - Atlanta, GA)

Deliverables

- Whole market maps showing ranked trade areas and supporting data.
- Reports containing details for ranked areas.
- Spreadsheet that provides details for ranked areas.
- Detailed maps and companion reports for trade areas that were selected for additional consideration.



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Site Level Due Diligence

Primary Competitors By Trade Area Page 1

Subject Site: Salt Lake City, UT - 90 South 400 West Salt Lake City, UT 84101

Name	Address	City	State	Zip
0-10 min				
APPLEBEES	159 S RIO GRANDE	SALT LAKE CITY	UT	84101
APPLEBEES	2176 WEST CITY CENTER COURT	WEST VALLEY CITY	UT	84119

Secondary Competitors By Trade Area Page 1

Subject Site: Salt Lake City, UT - 90 South 400 West Salt Lake City, UT 84101

Name	Address	City	State	Zip
0-10 min				
DESERT STATE BANQUETS & CATER	4861 S STATE ST	MURRAY	UT	84107-4821

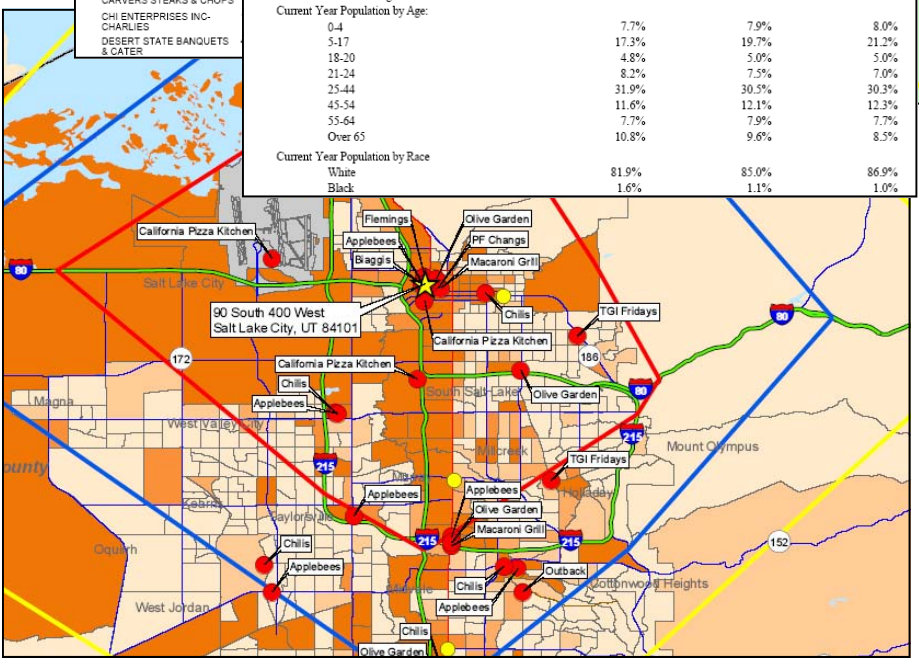
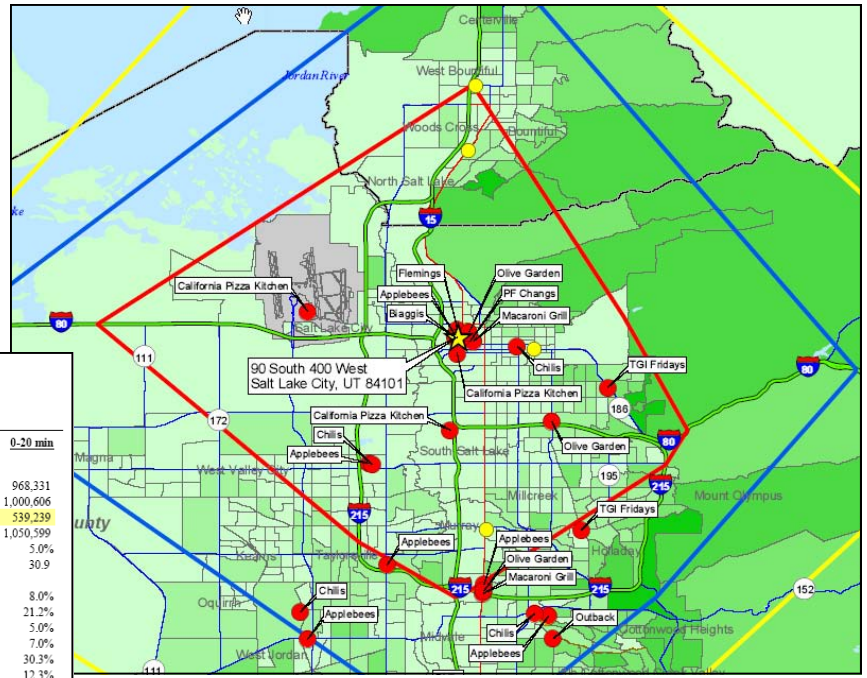
0-15 min				
APPLEBEES	SPENCER'S FOR STEAKS & CHOP			
APPLEBEES	WAGONMASTER RESTAURANT			
0-15 min				
APPLEBEES	BLACK ANGUS RESTAURANT			
APPLEBEES	BLACK ANGUS RESTAURANT			
BIAGGIS	CAFE ALICIA			
CALIFORNIA PIZZA KITCHEN	CHILIS			
CALIFORNIA PIZZA KITCHEN	CHILIS			
CHI ENTERPRISES INC- CHARLIES	DESERT STATE BANQUETS & CATER			

Demographic Summary Report - Drive Times

Subject Site: Salt Lake City, UT - 90 South 400 West Salt Lake City, UT 84101

Source: Applied Geographic Solutions, Estimates and Projections, June 2003

	0-10 min	0-15 min	0-20 min
Population:			
2000 Population - Census, Actual	389,934	749,421	968,331
Current Year Population	403,687	773,787	1,000,606
Current Year Employment	364,709	487,482	539,239
Projected Population - 5 Year	424,681	811,592	1,050,599
Projected Growth - 5 Year	5.2%	4.9%	5.0%
Current Year Median Age	32.0	31.4	30.9
Current Year Population by Age:			
0-4	7.7%	7.9%	8.0%
5-17	17.3%	19.7%	21.2%
18-20	4.8%	5.0%	5.0%
21-24	8.2%	7.5%	7.0%
25-44	31.9%	30.5%	30.3%
45-54	11.6%	12.1%	12.3%
55-64	7.7%	7.9%	7.7%
Over 65	10.8%	9.6%	8.5%
Current Year Population by Race			
White	81.9%	85.0%	86.9%
Black	1.6%	1.1%	1.0%



Work Objective

Develop standardized suite of deliverables that was used to compare and contrast potential sites for new restaurants.

Client

Ted Turner's Ted's Montana Grill Restaurant

Deliverables

- Maps of income and daytime population with competitor locations.
- Reports detailing demographics, primary competition and secondary competition within specified drive times.
- Spreadsheet that served as input to statistical analysis and basis for comparing and contrasting alternatives.



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