



Financial Expenditures

2911-2973 US-64
 2911-2973 US-64, Mocksville, North Carolina, 27028
 Ring: 1 mile radius

Prepared By Kyle Swicegood, CCIM, Broker
 Latitude: 35.88146
 Longitude: -80.45515

Demographic Summary		2020	2025
Population		520	541
Households		209	216
Families		154	160
Median Age		46.2	47.5
Median Household Income		\$62,850	\$70,203
		Spending Potential Index	Average Amount
			Total
Assets			
Value of Checking/Savings/Money Market Accounts & CDs	98	\$16,847.85	\$3,521,201
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	100	\$15,783.93	\$3,298,841
Value of Stocks/Bonds/Mutual Funds	93	\$22,759.90	\$4,756,820
Value of Stocks/Bonds/Mutual Funds (1 year ago)	92	\$20,942.30	\$4,376,940
Value of Other Financial Assets	97	\$7,927.33	\$1,656,813
Value of Other Financial Assets (1 year ago)	98	\$7,431.27	\$1,553,136
Value of Retirement Plans	98	\$93,263.63	\$19,492,099
Value of Retirement Plans (1 year ago)	98	\$81,170.91	\$16,964,720
Surrender Value of Whole Life Policies	83	\$10,035.12	\$2,097,340
Surrender Value of Whole Life Policies (1 year ago)	78	\$9,023.37	\$1,885,884
Earnings			
Interest/Dividends	92	\$1,079.73	\$225,664
Royalty/Estate/Trust Income	97	\$408.00	\$85,272
Liabilities			
Original Mortgage Amount (Owned Home)	84	\$11,122.33	\$2,324,566
Vehicle Loan Amount (1)	103	\$3,010.02	\$629,094
Value of Credit Card Debt	96	\$2,490.58	\$520,531
Value of Credit Card Debt (1 year ago)	97	\$2,412.87	\$504,289
Value Owed on Student Loans	87	\$6,064.63	\$1,267,508
Value Owed on Student Loans (1 year ago)	88	\$5,694.22	\$1,190,091
Value Owed on Non-student Loans	99	\$966.44	\$201,987
Value Owed on Non-student Loans (1 year ago)	96	\$699.58	\$146,212
Owned Dwellings - Special Lump Sum Mortgage Payments	87	\$436.12	\$91,149
Owned Dwellings - Special Assessments	113	\$17.94	\$3,749
Owned Dwellings - Property Purchase Closing Costs	91	\$270.93	\$56,624
Amount Paid: Interest			
Home Mortgage	93	\$3,396.44	\$709,856
Home Equity Loan	99	\$31.73	\$6,632
Home Equity Line of Credit	98	\$124.05	\$25,926
New Car/Truck/Van Loan	108	\$138.95	\$29,041
Used Car/Truck/Van Loan	106	\$131.93	\$27,573
Finance/Late/Interest Charges for Credit Cards	100	\$415.74	\$86,889
Finance/Late/Interest Charges for Student Loans	84	\$169.03	\$35,327
Finance/Late/Interest Charges for Non-student Loans	86	\$29.82	\$6,232
Amount Paid: Principal			
Home Mortgage	97	\$2,086.71	\$436,123
Home Equity Loan	101	\$61.44	\$12,842
Home Equity Line of Credit	120	\$389.71	\$81,450
New Car/Truck/Van Loan	105	\$1,169.35	\$244,395
Used Car/Truck/Van Loan	107	\$994.09	\$207,764
Checking Account and Banking Service Charges	88	\$27.75	\$5,800

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100.
 (1) **Vehicle Loan Amount** is the amount of a loan for a car, truck, van, SUV, motor home, boat, camper, motorcycle, motor scooter, moped, plane, snowmobile, dune buggy, ATV, or Segway, excluding interest.
Source: Esri forecasts for 2020 and 2025; Consumer Spending data are derived from the 2017 and 2018 Consumer Expenditure Surveys, Bureau of Labor Statistics.



Financial Expenditures

2911-2973 US-64
 2911-2973 US-64, Mocksville, North Carolina, 27028
 Ring: 3 mile radius

Prepared By Kyle Swicegood, CCIM, Broker
 Latitude: 35.88146
 Longitude: -80.45515

Demographic Summary		2020	2025
Population		3,174	3,304
Households		1,272	1,320
Families		943	975
Median Age		46.0	47.5
Median Household Income		\$63,497	\$69,967
		Spending Potential Index	Average Amount
			Total
Assets			
Value of Checking/Savings/Money Market Accounts & CDs	96	\$16,592.35	\$21,105,472
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	98	\$15,551.30	\$19,781,256
Value of Stocks/Bonds/Mutual Funds	92	\$22,499.16	\$28,618,929
Value of Stocks/Bonds/Mutual Funds (1 year ago)	91	\$20,723.09	\$26,359,773
Value of Other Financial Assets	96	\$7,843.52	\$9,976,955
Value of Other Financial Assets (1 year ago)	97	\$7,355.15	\$9,355,752
Value of Retirement Plans	97	\$92,370.83	\$117,495,702
Value of Retirement Plans (1 year ago)	97	\$80,424.00	\$102,299,331
Surrender Value of Whole Life Policies	82	\$9,882.94	\$12,571,105
Surrender Value of Whole Life Policies (1 year ago)	77	\$8,919.70	\$11,345,864
Earnings			
Interest/Dividends	91	\$1,067.24	\$1,357,533
Royalty/Estate/Trust Income	96	\$404.81	\$514,913
Liabilities			
Original Mortgage Amount (Owned Home)	83	\$10,944.19	\$13,921,008
Vehicle Loan Amount (1)	100	\$2,927.41	\$3,723,667
Value of Credit Card Debt	94	\$2,443.53	\$3,108,168
Value of Credit Card Debt (1 year ago)	95	\$2,368.56	\$3,012,803
Value Owed on Student Loans	85	\$5,967.25	\$7,590,340
Value Owed on Student Loans (1 year ago)	86	\$5,604.75	\$7,129,239
Value Owed on Non-student Loans	96	\$941.82	\$1,197,989
Value Owed on Non-student Loans (1 year ago)	94	\$681.07	\$866,324
Owned Dwellings - Special Lump Sum Mortgage Payments	87	\$432.23	\$549,793
Owned Dwellings - Special Assessments	113	\$17.88	\$22,749
Owned Dwellings - Property Purchase Closing Costs	89	\$265.86	\$338,169
Amount Paid: Interest			
Home Mortgage	91	\$3,335.67	\$4,242,974
Home Equity Loan	98	\$31.43	\$39,974
Home Equity Line of Credit	98	\$123.42	\$156,995
New Car/Truck/Van Loan	105	\$135.29	\$172,093
Used Car/Truck/Van Loan	103	\$128.33	\$163,242
Finance/Late/Interest Charges for Credit Cards	97	\$404.39	\$514,379
Finance/Late/Interest Charges for Student Loans	82	\$165.81	\$210,914
Finance/Late/Interest Charges for Non-student Loans	84	\$29.14	\$37,066
Amount Paid: Principal			
Home Mortgage	96	\$2,052.90	\$2,611,289
Home Equity Loan	100	\$60.87	\$77,425
Home Equity Line of Credit	120	\$389.56	\$495,524
New Car/Truck/Van Loan	102	\$1,139.81	\$1,449,839
Used Car/Truck/Van Loan	104	\$966.90	\$1,229,903
Checking Account and Banking Service Charges	85	\$27.05	\$34,411

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100.
 (1) **Vehicle Loan Amount** is the amount of a loan for a car, truck, van, SUV, motor home, boat, camper, motorcycle, motor scooter, moped, plane, snowmobile, dune buggy, ATV, or Segway, excluding interest.
Source: Esri forecasts for 2020 and 2025; Consumer Spending data are derived from the 2017 and 2018 Consumer Expenditure Surveys, Bureau of Labor Statistics.



Financial Expenditures

2911-2973 US-64
 2911-2973 US-64, Mocksville, North Carolina, 27028
 Ring: 5 mile radius

Prepared By Kyle Swicegood, CCIM, Broker
 Latitude: 35.88146
 Longitude: -80.45515

Demographic Summary		2020	2025
Population		11,539	12,014
Households		4,429	4,604
Families		3,264	3,381
Median Age		44.1	45.5
Median Household Income		\$57,976	\$62,910
		Spending Potential Index	Average Amount
			Total
Assets			
Value of Checking/Savings/Money Market Accounts & CDs	90	\$15,474.69	\$68,537,392
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	91	\$14,409.53	\$63,819,788
Value of Stocks/Bonds/Mutual Funds	87	\$21,127.80	\$93,575,038
Value of Stocks/Bonds/Mutual Funds (1 year ago)	86	\$19,433.84	\$86,072,477
Value of Other Financial Assets	88	\$7,225.10	\$31,999,989
Value of Other Financial Assets (1 year ago)	89	\$6,745.28	\$29,874,823
Value of Retirement Plans	90	\$86,085.38	\$381,272,147
Value of Retirement Plans (1 year ago)	90	\$74,786.25	\$331,228,311
Surrender Value of Whole Life Policies	78	\$9,410.21	\$41,677,830
Surrender Value of Whole Life Policies (1 year ago)	74	\$8,595.95	\$38,071,474
Earnings			
Interest/Dividends	86	\$1,009.39	\$4,470,606
Royalty/Estate/Trust Income	87	\$368.00	\$1,629,858
Liabilities			
Original Mortgage Amount (Owned Home)	81	\$10,714.13	\$47,452,891
Vehicle Loan Amount (1)	95	\$2,764.12	\$12,242,271
Value of Credit Card Debt	88	\$2,298.02	\$10,177,913
Value of Credit Card Debt (1 year ago)	90	\$2,223.00	\$9,845,647
Value Owed on Student Loans	79	\$5,551.26	\$24,586,519
Value Owed on Student Loans (1 year ago)	80	\$5,197.43	\$23,019,414
Value Owed on Non-student Loans	91	\$885.22	\$3,920,625
Value Owed on Non-student Loans (1 year ago)	87	\$633.23	\$2,804,588
Owned Dwellings - Special Lump Sum Mortgage Payments	81	\$406.04	\$1,798,367
Owned Dwellings - Special Assessments	97	\$15.35	\$68,003
Owned Dwellings - Property Purchase Closing Costs	85	\$254.97	\$1,129,265
Amount Paid: Interest			
Home Mortgage	88	\$3,201.47	\$14,179,293
Home Equity Loan	92	\$29.41	\$130,264
Home Equity Line of Credit	90	\$114.25	\$506,016
New Car/Truck/Van Loan	98	\$126.60	\$560,704
Used Car/Truck/Van Loan	96	\$119.79	\$530,528
Finance/Late/Interest Charges for Credit Cards	93	\$387.86	\$1,717,810
Finance/Late/Interest Charges for Student Loans	78	\$157.87	\$699,219
Finance/Late/Interest Charges for Non-student Loans	82	\$28.46	\$126,067
Amount Paid: Principal			
Home Mortgage	91	\$1,943.68	\$8,608,567
Home Equity Loan	94	\$56.82	\$251,664
Home Equity Line of Credit	104	\$337.66	\$1,495,496
New Car/Truck/Van Loan	96	\$1,071.31	\$4,744,821
Used Car/Truck/Van Loan	97	\$903.32	\$4,000,807
Checking Account and Banking Service Charges	81	\$25.71	\$113,872

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100.
 (1) **Vehicle Loan Amount** is the amount of a loan for a car, truck, van, SUV, motor home, boat, camper, motorcycle, motor scooter, moped, plane, snowmobile, dune buggy, ATV, or Segway, excluding interest.
Source: Esri forecasts for 2020 and 2025; Consumer Spending data are derived from the 2017 and 2018 Consumer Expenditure Surveys, Bureau of Labor Statistics.