

**TULSA, OK**

**W PINE AVE AND N UNION AVE**

**GAP ANALYSIS**

**PREPARED FOR  
TLH AND ASSOCIATES**

**PREPARED BY**



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## PopStats Demographic Data

This PopStats demographic data utilized in this report is provided by Synergos Technologies. This data is updated quarterly to end users based on new ZIP+4 data (note that new data and statistics are delivered monthly, updated quarterly). This data is modeled where a growth factor is derived for every ZIP+4 in the country. This application occurs via a proprietary model that uses this information as well as other pertinent factors (see below) to generate a current estimate. The data sources for PopStats datasets come from:

- United States Postal Service (USPS)
- United States Department of Defense (DMDC)
- United States Census Bureau
- National Center for Education Statistics (NCES)
- Federal Financial Institutions Examination Council (FFIEC)
- Internal Revenue Service (IRS)
- Bureau of Economic Analysis (BEA)
- Bureau of Labor Statistics (BLS)
- Office of Federal Housing Enterprise Oversight (OFHEO)

Most data vendors and therefore most data analysts are using information that is delivered once annually and is based upon trended census growth figures (i.e., 1990 to 2000). Census trended data misses any new growth that may occur, particularly isolated hot communities that tend to flare up in a few years and sometimes a few quarters.

### STI: Market Outlook - Methodology

The consumer demand and supply data for STI: Market Outlook is derived for annual retail sales and expenditures from the following three major sources of information:

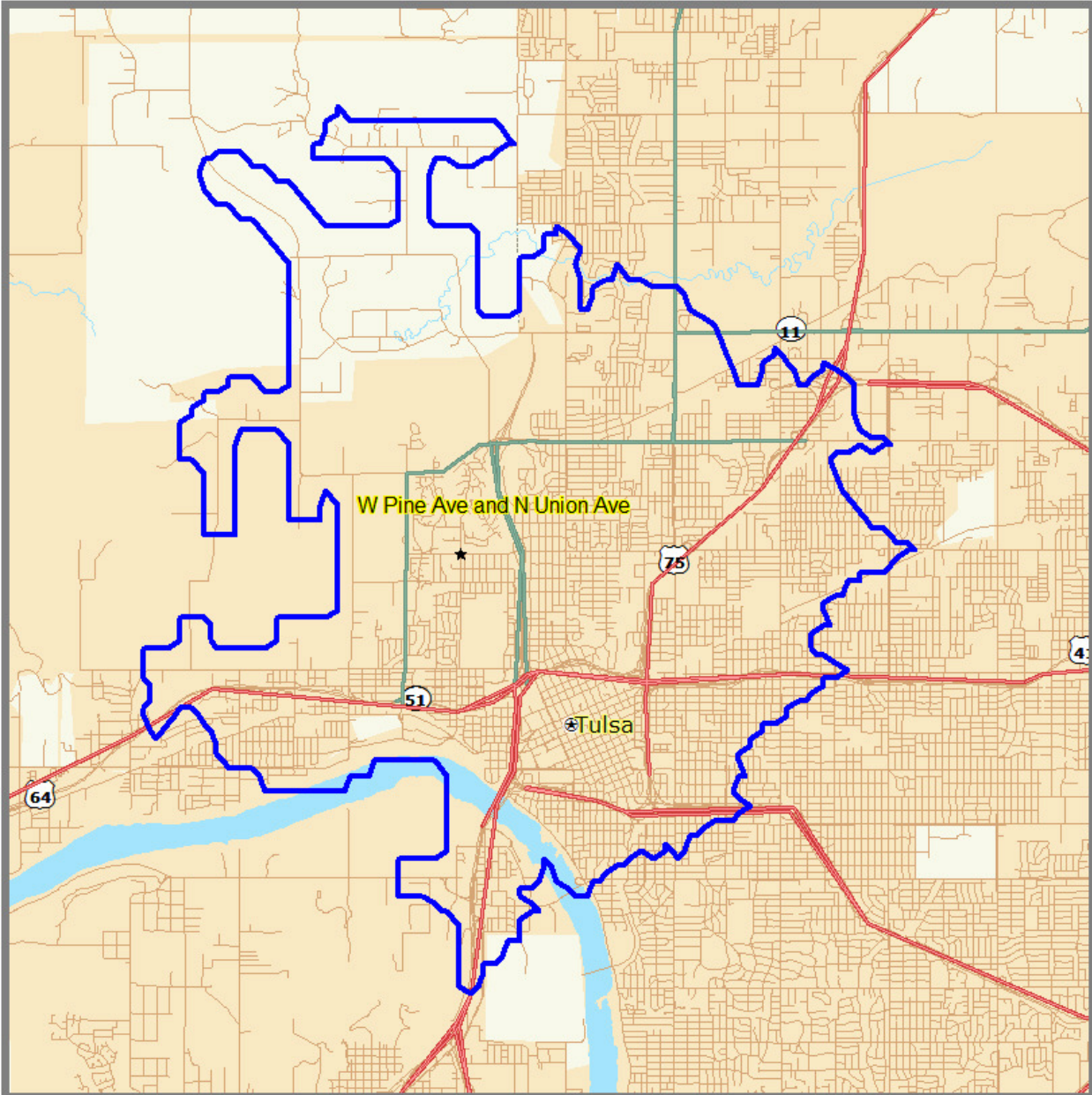
1. **U.S. Bureau of Labor Statistics' Consumer Expenditure Survey (CE).** Demand data is derived from this source.
2. **U.S. Census Bureau's Census of Retail Trade (CRT) reports.** The annual and monthly reports contribute to Market Outlook's supply data.
3. **U.S. Census Bureau's Economic Census.** Supply data is also derived from this source, which provides an even more detailed view than the CRT reports.

STI: Market Outlook delivers nearly 300 market supply and demand variables at four levels of geography: block group, tract, county, and state. The variables include the following: current year data, recent historical demand data, and supporting demographic data.

- **Consumer Demand**
  - Consumer Demand for 2009 - by 31 leading retail segments
  - Consumer Demand for 2008 - by 31 leading retail segments
  - Consumer Demand for 2007 - by 31 leading retail segments
  - Consumer Demand for 2009 - by 40 major product lines
  - Consumer Demand for 2008 - by 40 major product lines
  - Consumer Demand for 2007 - by 40 major product lines
- **Market Supply**
  - Market Supply for 2009 - by 31 leading retail segments
  - Market Supply for 2009 - by 40 major product lines
- **Supporting Demographics**

Population estimate	Group quarters estimate
Household estimate	Workplace estimate
Population in household estimate	Workplace employees estimate

**Tulsa, OK  
W Pine Ave and N Union Ave**



**Tulsa Market Area  
W Pine Ave and N Union Ave  
Heavy Traffic Conditions - 8 Minute Drive Time**

## Market Outlook Comparison - GAP Analysis



W Pine and N Union

### Supporting Demographics (2009)

Household Estimate	21,199
Population Estimate	51,111
Group Quarter Estimate	3,141
Workplace Employees	54,403
Workplace Establishments	2,291

Market Outlook 2009 - By Establishment Type	Demand	Supply	GAP
Automobile dealers	\$86,854,932	\$119,373,269	(\$32,518,337)
Automotive parts, accessories & tire stores	\$11,088,983	\$21,743,331	(\$10,654,348)
Bars/Drinking places (alcoholic beverages)	\$8,184,868	\$15,673,175	(\$7,488,307)
Beer, wine & liquor stores	\$6,466,906	\$16,217,190	(\$9,750,284)
Book, periodical & music stores	\$5,202,812	\$5,117,076	\$85,736
Building material & supplies dealers	\$40,048,171	\$57,096,873	(\$17,048,702)
Clothing stores	\$15,620,836	\$10,974,675	\$4,646,161
Department stores	\$37,650,938	\$21,271,993	\$16,378,945
Direct selling establishments	\$7,119,518	\$5,785,388	\$1,334,130
Electronic shopping & mail-order houses	\$6,115,331	\$0	\$6,115,331
Electronics & appliance stores	\$17,880,440	\$15,133,684	\$2,746,756
Florists and miscellaneous store retailers	\$1,036,005	\$1,754,003	(\$717,998)
Full-service restaurants	\$43,478,716	\$42,251,564	\$1,227,152
Furniture stores	\$6,456,680	\$4,823,722	\$1,632,958
Gasoline stations	\$66,330,422	\$114,644,866	(\$48,314,444)
Grocery stores	\$85,036,598	\$109,791,655	(\$24,755,057)
Health & personal care stores	\$31,687,209	\$31,579,663	\$107,546
Home furnishings stores	\$7,470,268	\$4,731,491	\$2,738,777
Jewelry, luggage & leather goods stores	\$3,913,102	\$530,327	\$3,382,775
Lawn & garden equipment & supplies stores	\$8,649,417	\$4,067,058	\$4,582,359
Limited-service eating places	\$49,198,669	\$50,954,853	(\$1,756,184)
Office supplies, stationery & gift stores	\$7,382,232	\$8,338,685	(\$956,453)
Other general merchandise stores	\$57,146,270	\$19,970,633	\$37,175,637
Other miscellaneous store retailers	\$11,601,006	\$17,845,440	(\$6,244,434)
Other motor vehicle dealers	\$8,645,624	\$4,140,621	\$4,505,003
Shoe stores	\$2,751,600	\$4,175,036	(\$1,423,436)
Special food services	\$7,845,856	\$5,568,400	\$2,277,456
Specialty food stores	\$1,462,267	\$1,721,073	(\$258,806)
Sporting goods, hobby & musical instrument stores	\$6,667,217	\$3,410,491	\$3,256,726

Used merchandise stores	\$3,114,547	\$2,684,611	\$429,936
Vending machine operators (Nonstore retailers)	\$7,706,294	\$46,160,395	(\$38,454,101)

<b>Market Outlook 2009 - By Major Product Line</b>	<b>Demand</b>	<b>Supply</b>	<b>GAP</b>
Alcoholic drinks served at the establishment	\$24,255,492	\$24,922,762	(\$667,270)
All other merchandise	\$19,725,601	\$21,933,226	(\$2,207,625)
Audio equipment & musical instruments & related materials	\$3,620,736	\$4,122,885	(\$502,149)
Automotive fuels	\$54,445,828	\$89,589,782	(\$35,143,954)
Automotive lubricants, including oil, greases, etc.	\$1,198,305	\$1,757,175	(\$558,870)
Automotive tires, tubes, batteries, parts, accessories	\$18,234,230	\$26,395,427	(\$8,161,197)
Autos, cars, vans, trucks & motorcycles	\$70,449,042	\$98,736,608	(\$28,287,566)
Books/Periodicals	\$4,217,516	\$3,808,035	\$409,481
Children's wear & infants' & toddlers' clothing & accessories	\$3,553,722	\$2,622,437	\$931,285
Cigars, cigarettes, tobacco & smokers' accessories	\$15,893,394	\$20,844,528	(\$4,951,134)
Computer hardware, software & supplies, including gaming	\$17,868,983	\$6,647,088	\$11,221,895
Curtains, draperies, blinds, slipcovers, bed & table coverings	\$2,019,112	\$1,724,026	\$295,086
Dimensional lumber & other building/structural materials & supplies	\$20,054,165	\$27,862,206	(\$7,808,041)
Drugs, health aids, beauty aids, including cosmetics	\$51,041,688	\$41,624,708	\$9,416,980
Flooring & floor coverings	\$5,982,213	\$4,730,647	\$1,251,566
Footwear, including accessories	\$6,345,391	\$6,001,475	\$343,916
Furniture, sleep equipment & outdoor/patio furniture	\$13,103,020	\$9,491,368	\$3,611,652
Groceries & other food items for human consumption off the premises	\$116,096,719	\$143,698,631	(\$27,601,912)
Hardware, tools & plumbing & electrical supplies	\$11,499,577	\$15,664,049	(\$4,164,472)
Household fuels, including oil, LP gas, wood, coal	\$3,642,201	\$3,740,693	(\$98,492)
Jewelry, including watches	\$5,432,039	\$1,728,083	\$3,703,956
Kitchenware & home furnishings	\$6,719,577	\$4,852,243	\$1,867,334
Lawn, garden & farm equipment & supplies	\$11,469,900	\$9,050,445	\$2,419,455
Major household appliances	\$1,781,361	\$3,363,563	(\$1,582,202)
Meals & nonalcoholic beverages for immediate consumption	\$90,492,561	\$104,836,766	(\$14,344,205)
Men's wear	\$6,961,751	\$4,853,771	\$2,107,980
Optical goods, including eyeglasses, contact lenses, sunglasses, etc.	\$1,499,102	\$1,469,503	\$29,599
Packaged liquor, wine & beer	\$10,294,632	\$22,190,309	(\$11,895,677)
Paint & sundries / Wallpaper & other flexible wallcoverings	\$3,406,358	\$4,619,674	(\$1,213,316)
Paper & related products	\$3,404,131	\$3,294,751	\$109,380
Pets, pet foods & pet supplies	\$3,277,973	\$3,850,695	(\$572,722)
Photographic equipment & supplies	\$520,857	\$725,630	(\$204,773)
Retailer Services	\$16,071,381	\$20,921,648	(\$4,850,267)

Sewing, knitting materials & supplies	\$488,537	\$362,766	\$125,771
Small electric appliances	\$740,390	\$690,687	\$49,703
Soaps, detergents & household cleaners	\$3,440,027	\$3,374,335	\$65,692
Sporting goods, including saddlery, bicycles & motorized sport vehicles	\$8,753,586	\$4,219,685	\$4,533,901
Televisions, video recorders, video cameras, video tapes, DVDs, etc.	\$2,699,203	\$4,291,301	(\$1,592,098)
Toys, hobby goods & games	\$2,932,724	\$2,512,299	\$420,425
Women's, juniors' & misses' wear	\$16,180,697	\$10,405,323	\$5,775,374

*Market Outlook provides a direct comparison between annual retail sales and consumer spending in 31 retail segments and 40 major retail lines for both supply and demand, as identified by NAICS (the North American Industry Classification System). A negative value notes Supply potentially exceeds Demand.*

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