

**TULSA, OK
N GILCREASE MUSEUM RD AND
W EDISON ST**

GAP ANALYSIS

**PREPARED FOR
TLH AND ASSOCIATES**

PREPARED BY



Table of Contents

<u>Item</u>	<u>Page</u>
1. PopStats Demographic Data	3
2. Tulsa, OK	
a. Map – N Gilcrease and W Edison	4
b. GAP Analysis	5

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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:

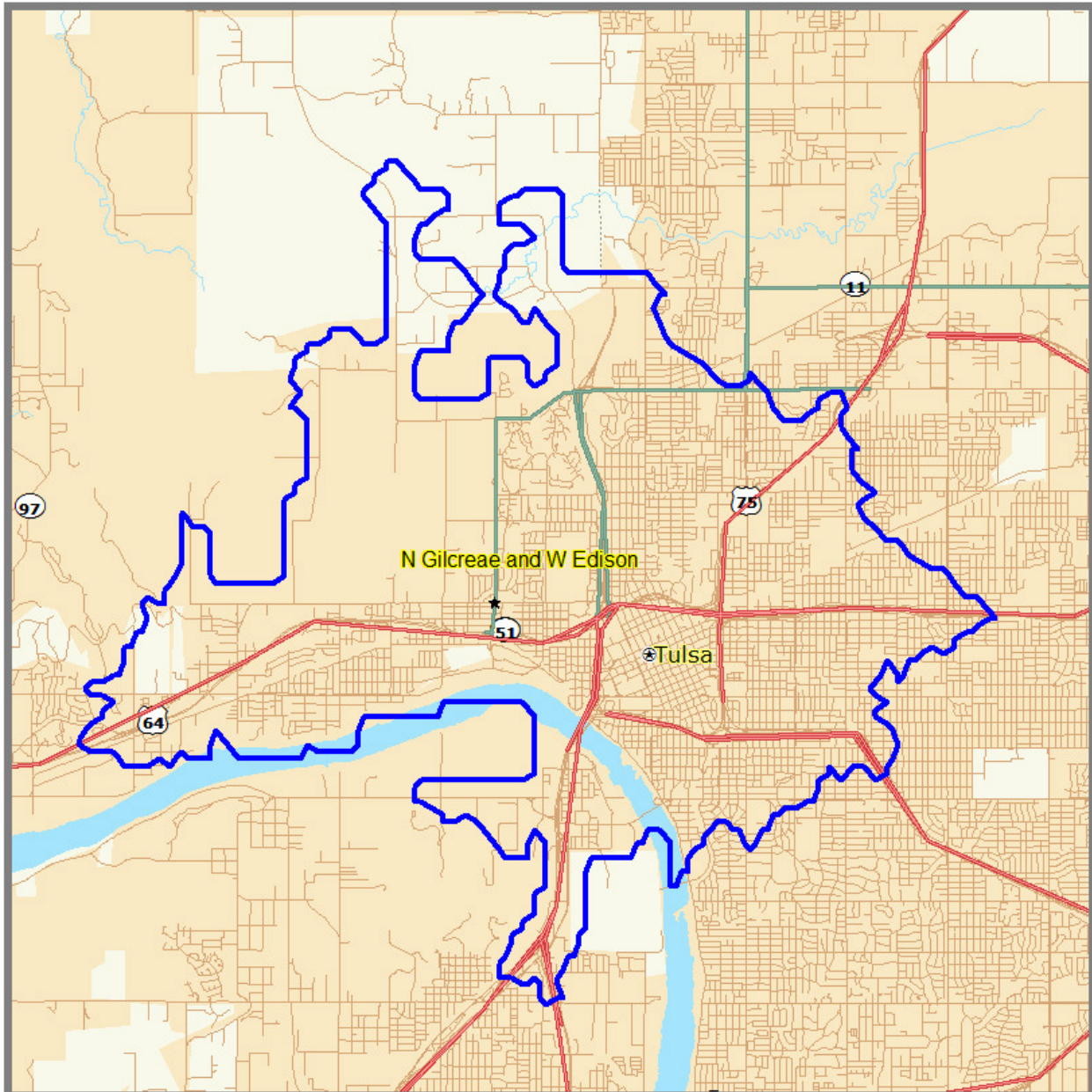
1. **U.S. Bureau of Labor Statistics' Consumer Expenditure Survey (CE).** Demand data is derived from this source.
2. **U.S. Census Bureau's Census of Retail Trade (CRT) reports.** The annual and monthly reports contribute to Market Outlook's supply data.
3. **U.S. Census Bureau's Economic Census.** 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
N Gilcrease Museum Rd and W Edison St



Tulsa Market Area
N Gilcrease and W Edison
Heavy Traffic Conditions - 8 Minute Drive Time

Market Outlook Comparison - GAP Analysis



N Gilcrease and W Edison

Supporting Demographics (2009)

Household Estimate	25,424
Population Estimate	60,645
Group Quarter Estimate	3,879
Workplace Employees	65,027
Workplace Establishments	2,772

Market Outlook 2009 - By Establishment Type

	Demand	Supply	GAP
Automobile dealers	\$103,822,280	\$156,814,003	(\$52,991,723)
Automotive parts, accessories & tire stores	\$13,116,033	\$26,945,757	(\$13,829,724)
Bars/Drinking places (alcoholic beverages)	\$9,875,200	\$16,265,290	(\$6,390,090)
Beer, wine & liquor stores	\$7,659,885	\$19,917,383	(\$12,257,498)
Book, periodical & music stores	\$6,159,961	\$6,214,000	(\$54,039)
Building material & supplies dealers	\$47,357,458	\$62,849,395	(\$15,491,937)
Clothing stores	\$18,565,769	\$21,191,413	(\$2,625,644)
Department stores	\$44,690,850	\$25,371,297	\$19,319,553
Direct selling establishments	\$8,418,911	\$6,689,444	\$1,729,467
Electronic shopping & mail-order houses	\$7,270,899	\$0	\$7,270,899
Electronics & appliance stores	\$21,529,902	\$18,735,680	\$2,794,222
Florists and miscellaneous store retailers	\$1,230,300	\$1,947,862	(\$717,562)
Full-service restaurants	\$52,367,466	\$53,028,788	(\$661,322)
Furniture stores	\$7,709,627	\$5,063,845	\$2,645,782
Gasoline stations	\$78,835,192	\$123,997,599	(\$45,162,407)
Grocery stores	\$100,488,216	\$139,155,315	(\$38,667,099)
Health & personal care stores	\$37,434,851	\$42,534,053	(\$5,099,202)
Home furnishings stores	\$8,859,960	\$8,713,738	\$146,222
Jewelry, luggage & leather goods stores	\$4,669,615	\$544,283	\$4,125,332
Lawn & garden equipment & supplies stores	\$10,272,653	\$3,907,600	\$6,365,053
Limited-service eating places	\$59,190,391	\$67,691,644	(\$8,501,253)
Office supplies, stationery & gift stores	\$8,819,822	\$11,511,971	(\$2,692,149)
Other general merchandise stores	\$67,675,946	\$25,258,746	\$42,417,200
Other miscellaneous store retailers	\$13,720,331	\$20,143,492	(\$6,423,161)
Other motor vehicle dealers	\$10,304,826	\$5,379,337	\$4,925,489
Shoe stores	\$3,274,657	\$4,633,831	(\$1,359,174)
Special food services	\$9,441,127	\$6,950,095	\$2,491,032
Specialty food stores	\$1,727,935	\$2,536,455	(\$808,520)
Sporting goods, hobby & musical instrument stores	\$7,929,955	\$3,905,138	\$4,024,817

Used merchandise stores	\$3,707,879	\$5,722,715	(\$2,014,836)
Vending machine operators (Nonstore retailers)	\$9,150,297	\$49,404,175	(\$40,253,878)

Market Outlook 2009 - By Major Product Line

	Demand	Supply	GAP
Alcoholic drinks served at the establishment	\$29,271,981	\$28,150,585	\$1,121,396
All other merchandise	\$23,498,702	\$27,907,399	(\$4,408,697)
Audio equipment & musical instruments & related materials	\$4,291,095	\$5,067,030	(\$775,935)
Automotive fuels	\$64,805,731	\$97,149,981	(\$32,344,250)
Automotive lubricants, including oil, greases, etc.	\$1,413,963	\$2,150,126	(\$736,163)
Automotive tires, tubes, batteries, parts, accessories	\$21,543,246	\$33,109,332	(\$11,566,086)
Autos, cars, vans, trucks & motorcycles	\$84,293,425	\$129,690,084	(\$45,396,659)
Books/Periodicals	\$4,963,481	\$4,775,018	\$188,463
Children's wear & infants' & toddlers' clothing & accessories	\$4,241,526	\$4,084,051	\$157,475
Cigars, cigarettes, tobacco & smokers' accessories	\$18,667,160	\$23,726,590	(\$5,059,430)
Computer hardware, software & supplies, including gaming	\$21,566,501	\$8,350,268	\$13,216,233
Curtains, draperies, blinds, slipcovers, bed & table coverings	\$2,423,338	\$2,448,636	(\$25,298)
Dimensional lumber & other building/structural materials & supplies	\$23,666,236	\$30,688,111	(\$7,021,875)
Drugs, health aids, beauty aids, including cosmetics	\$60,232,296	\$54,645,030	\$5,587,266
Flooring & floor coverings	\$7,075,296	\$6,805,356	\$269,940
Footwear, including accessories	\$7,551,073	\$7,413,444	\$137,629
Furniture, sleep equipment & outdoor/patio furniture	\$15,647,761	\$11,653,833	\$3,993,928
Groceries & other food items for human consumption off the premises	\$137,129,992	\$173,819,279	(\$36,689,287)
Hardware, tools & plumbing & electrical supplies	\$13,609,800	\$17,386,614	(\$3,776,814)
Household fuels, including oil, LP gas, wood, coal	\$4,290,436	\$4,262,055	\$28,381
Jewelry, including watches	\$6,482,795	\$2,355,427	\$4,127,368
Kitchenware & home furnishings	\$7,956,125	\$6,871,272	\$1,084,853
Lawn, garden & farm equipment & supplies	\$13,614,041	\$9,708,101	\$3,905,940
Major household appliances	\$2,153,374	\$4,029,180	(\$1,875,806)
Meals & nonalcoholic beverages for immediate consumption	\$108,884,515	\$132,443,347	(\$23,558,832)
Men's wear	\$8,312,984	\$7,651,367	\$661,617
Optical goods, including eyeglasses, contact lenses, sunglasses, etc.	\$1,795,059	\$1,971,957	(\$176,898)
Packaged liquor, wine & beer	\$12,196,376	\$26,875,329	(\$14,678,953)
Paint & sundries / Wallpaper & other flexible wallcoverings	\$4,021,519	\$5,118,932	(\$1,097,413)
Paper & related products	\$4,008,771	\$4,133,818	(\$125,047)
Pets, pet foods & pet supplies	\$3,936,604	\$4,466,670	(\$530,066)

Photographic equipment & supplies	\$627,008	\$905,110	(\$278,102)
Retailer Services	\$19,242,229	\$26,806,875	(\$7,564,646)
Sewing, knitting materials & supplies	\$578,105	\$431,214	\$146,891
Small electric appliances	\$876,154	\$881,244	(\$5,090)
Soaps, detergents & household cleaners	\$4,065,207	\$4,189,167	(\$123,960)
Sporting goods, including saddlery, bicycles & motorized sport vehicles	\$10,411,521	\$5,271,150	\$5,140,371
Televisions, video recorders, video cameras, video tapes, DVDs, etc.	\$3,261,489	\$5,306,641	(\$2,045,152)
Toys, hobby goods & games	\$3,487,297	\$3,209,099	\$278,198
Women's, juniors' & misses' wear	\$19,183,951	\$17,115,611	\$2,068,340

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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