

**PAWHUSKA, OK**

**GAP ANALYSIS**



**PAWHUSKA**  
CHAMBER OF COMMERCE

*Gateway  
to the Tallgrass Prairie*

**PREPARED FOR  
TLH AND ASSOCIATES**

**PREPARED BY**



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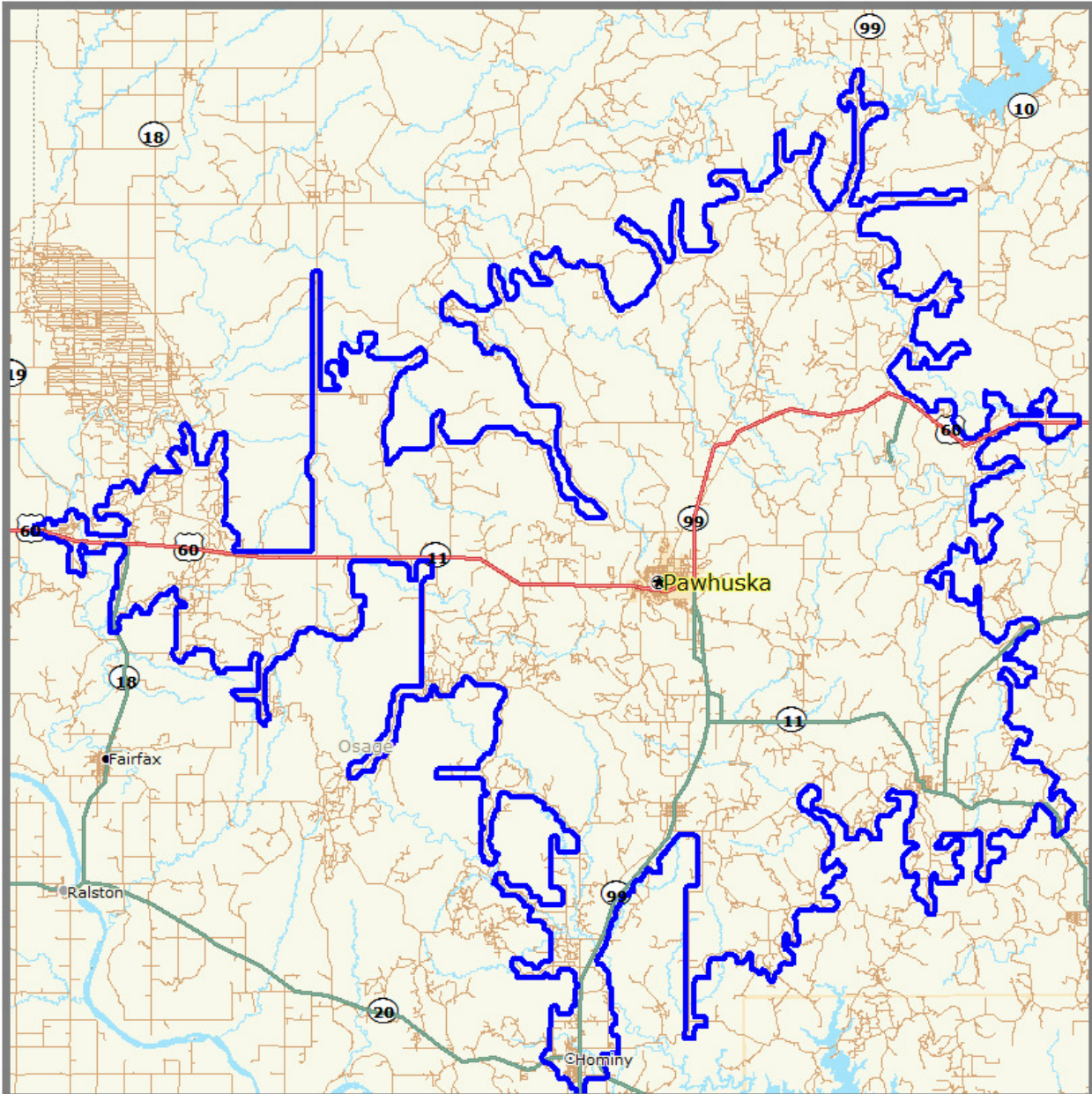
## **PopStats Demographic Data**

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.

# Pawhuska, OK



**Pawhuska Market Area**  
**Normal Speeds - 30 Minute Drive Time**

**Market Outlook Comparison - GAP Analysis**  
**Pawhuska Market Area**



**Supporting Demographics (2009)**

Household Estimate	4,189
Population Estimate	11,630
Workplace Employees	2,581
Workplace Establishments	315

<b>Market Outlook 2009 By Establishment Type</b>	<b>Demand</b>	<b>Supply</b>	<b>GAP</b>	<b>Relative GAP Index</b>
Automobile dealers	\$19,179,825	\$12,298,100	6,881,725	23.2
Automotive parts, accessories & tire stores	\$2,386,081	\$1,031,376	1,354,705	41.4
Bars/Drinking places (alcoholic beverages)	\$613,934	\$513,380	100,554	9.1
Beer, wine & liquor stores	\$1,382,694	\$1,834,137	(451,443)	(15.9)
Book, periodical & music stores	\$1,068,565	\$0	1,068,565	90.9
Building material & supplies dealers	\$8,604,227	\$3,513,222	5,091,005	43.8
Clothing stores	\$3,392,080	\$531,449	2,860,631	71.0
Department stores	\$8,018,953	\$0	8,018,953	90.9
Direct selling establishments	\$1,496,607	\$2,021,908	(525,301)	(16.8)
Electronic shopping & mail-order houses	\$1,101,233	\$0	1,101,233	90.9
Electronics & appliance stores	\$1,857,693	\$197,350	1,660,343	77.2
Florists and miscellaneous store retailers	\$224,923	\$378,344	(153,421)	(26.6)
Full-service restaurants	\$4,578,294	\$950,537	3,627,757	65.1
Furniture stores	\$1,407,129	\$0	1,407,129	90.9
Gasoline stations	\$14,347,283	\$14,515,598	(168,315)	(1.4)
Grocery stores	\$17,995,426	\$29,117,382	(11,121,956)	(25.0)
Health & personal care stores	\$6,825,238	\$3,046,227	3,779,011	40.1
Home furnishings stores	\$1,615,683	\$0	1,615,683	90.9
Jewelry, luggage & leather goods stores	\$852,523	\$0	852,523	90.9
Lawn & garden equipment & supplies stores	\$1,879,111	\$0	1,879,111	90.9
Limited-service eating places	\$6,053,682	\$3,237,395	2,816,287	32.1
Office supplies, stationery & gift stores	\$1,320,362	\$669,162	651,200	(100.0)
Other general merchandise stores	\$11,939,350	\$8,672,359	3,266,991	16.7
Other miscellaneous store retailers	\$2,517,976	\$2,298,291	219,685	4.3
Other motor vehicle dealers	\$1,883,297	\$0	1,883,297	90.9
Shoe stores	\$597,377	\$0	597,377	90.9
Special food services	\$938,796	\$1,339,535	(400,739)	(19.4)
Specialty food stores	\$308,553	\$438,304	(129,751)	(19.2)
Sporting goods, hobby & musical instrument stores	\$1,444,369	\$1,451,700	(7,331)	(1.1)
Used merchandise stores	\$671,364	\$673,873	(2,509)	(1.0)
Vending machine operators (Nonstore retailers)	\$1,442,851	\$2,432,202	(989,351)	(26.7)

<b>Market Outlook 2009 By Major Product Line</b>	<b>Demand</b>	<b>Supply</b>	<b>GAP</b>	<b>Relative GAP Index</b>
Alcoholic drinks served at the establishment	\$1,747,315	\$789,022	958,293	39.6
All other merchandise	\$4,321,848	\$2,733,287	1,588,561	23.9
Audio equipment & musical instruments & related materials	\$780,286	\$353,578	426,708	39.5
Automotive fuels	\$11,965,756	\$11,609,443	356,313	0.9
Automotive lubricants, including oil, greases, etc.	\$256,644	\$154,334	102,310	26.4
Automotive tires, tubes, batteries, parts, accessories	\$3,910,863	\$1,801,484	2,109,379	38.8
Autos, cars, vans, trucks & motorcycles	\$15,582,469	\$10,067,572	5,514,897	22.8
Books/Periodicals	\$903,292	\$234,616	668,676	59.2

Children's wear & infants' & toddlers' clothing & accessories	\$750,816	\$240,442	510,374	52.7
Cigars, cigarettes, tobacco & smokers' accessories	\$3,405,991	\$3,155,493	250,498	3.4
Computer hardware, software & supplies, including gaming	\$873,132	\$263,013	610,119	54.7
Curtains, draperies, blinds, slipcovers, bed & table coverings	\$452,161	\$152,909	299,252	50.8
Dimensional lumber & other building/structural materials & supplies	\$4,290,435	\$1,723,444	2,566,991	44.4
Drugs, health aids, beauty aids, including cosmetics	\$10,984,589	\$5,864,384	5,120,205	32.2
Flooring & floor coverings	\$1,281,314	\$177,291	1,104,023	73.2
Footwear, including accessories	\$1,377,413	\$221,919	1,155,494	70.5
Furniture, sleep equipment & outdoor/patio furniture	\$2,855,338	\$588,880	2,266,458	65.2
Groceries & other food items for human consumption off the premises	\$24,724,860	\$30,396,810	(5,671,950)	(12.0)
Hardware, tools & plumbing & electrical supplies	\$2,472,014	\$1,060,558	1,411,456	41.8
Household fuels, including oil, LP gas, wood, coal	\$774,780	\$1,082,314	(307,534)	(18.4)
Jewelry, including watches	\$1,182,186	\$145,398	1,036,788	75.1
Kitchenware & home furnishings	\$1,455,993	\$509,899	946,094	49.6
Lawn, garden & farm equipment & supplies	\$2,485,692	\$755,797	1,729,895	54.4
Major household appliances	\$405,848	\$159,084	246,764	45.4
Meals & nonalcoholic beverages for immediate consumption	\$11,098,989	\$6,628,250	4,470,739	26.8
Men's wear	\$1,518,417	\$379,239	1,139,178	60.3
Optical goods, including eyeglasses, contact lenses, sunglasses, etc.	\$326,401	\$161,258	165,143	35.7
Packaged liquor, wine & beer	\$2,201,158	\$3,036,072	(834,914)	(17.8)
Paint & sundries / Wallpaper & other flexible wallcoverings	\$729,466	\$309,339	420,127	42.2
Paper & related products	\$733,268	\$825,464	(92,196)	(7.3)
Pets, pet foods & pet supplies	\$739,174	\$614,704	124,470	9.4
Photographic equipment & supplies	\$115,549	\$68,373	47,176	27.2
Retailer Services	\$3,580,305	\$1,981,767	1,598,538	30.5
Sewing, knitting materials & supplies	\$106,578	\$110,370	(3,792)	(2.7)
Small electric appliances	\$161,311	\$91,034	70,277	29.5
Soaps, detergents & household cleaners	\$750,588	\$814,301	(63,713)	(5.3)
Sporting goods, including saddlery, bicycles & motorized sport vehicles	\$1,884,549	\$614,170	1,270,379	52.1
Televisions, video recorders, video cameras, video tapes, DVDs, etc.	\$605,545	\$166,771	438,774	57.5
Toys, hobby goods & games	\$630,497	\$472,447	158,050	15.1
Women's, juniors' & misses' wear	\$3,522,654	\$647,301	2,875,353	67.8

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. 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: **U.S. Bureau of Labor Statistics' Consumer Expenditure Survey (CE)**. Demand data is derived from this source. **U.S. Census Bureau's Census of Retail Trade (CRT) reports**. The annual and monthly reports contribute to Market Outlook's supply data. **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. **Relative GAP Index** (TruVue LLC) is a viability comparison measure showing if the market has excess demand 0 to +100 or excess supply 0 to -100. A positive Relative GAP Index indicates that consumers are purchasing outside the area (leakage). A negative Relative GAP Index indicates that there is excess supply or that the area is attracting consumers from outside the area where goods and services may not be available.

## Relative GAP Index



## Relative GAP Index



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