



2013

# SKIATOOK, OKLAHOMA MARKET ASSESSMENT

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# ABOUT THE SKIATOOK MARKET

## LOCATION AND ACCESSIBILITY

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The City of Skiatook, Oklahoma is a suburb of Tulsa just minutes from Tulsa's historic downtown business district. State Highways 20 and 11 intersect on the east side of Skiatook's downtown, and SH 20 connects Skiatook with US 75 on its eastern city limits. Skiatook's central retail corridor is a five mile stretch of SH20 that literally dissects the community and funnels thousands of people every year to the area's main destination, Skiatook Lake. Seasonal lake traffic brings visitors from all over northeast Oklahoma and southern Kansas through the retail district of Skiatook on their way to the lake.

## DEVELOPMENT ASSETS AND CONCERNS

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The City of Skiatook has created an environment in the community that is pro-growth and pro-business. Although growth has been slow, Skiatook did show positive growth over the last decade unlike countless other rural Oklahoma communities. Residential construction totals show an increase of 655 new residential permits in the city limits over the past ten years totaling nearly \$86 million in value. Skiatook benefits from its location on Highway 20 with average daily traffic counts of more than 11,700 vehicles per day traveling to and through Skiatook making the area a regional collection point for retail shopping opportunities. The City administration understands the necessity for public-private partnerships to facilitate retail development and works to make the development process as streamlined as possible.

## BUSINESS ENVIRONMENT

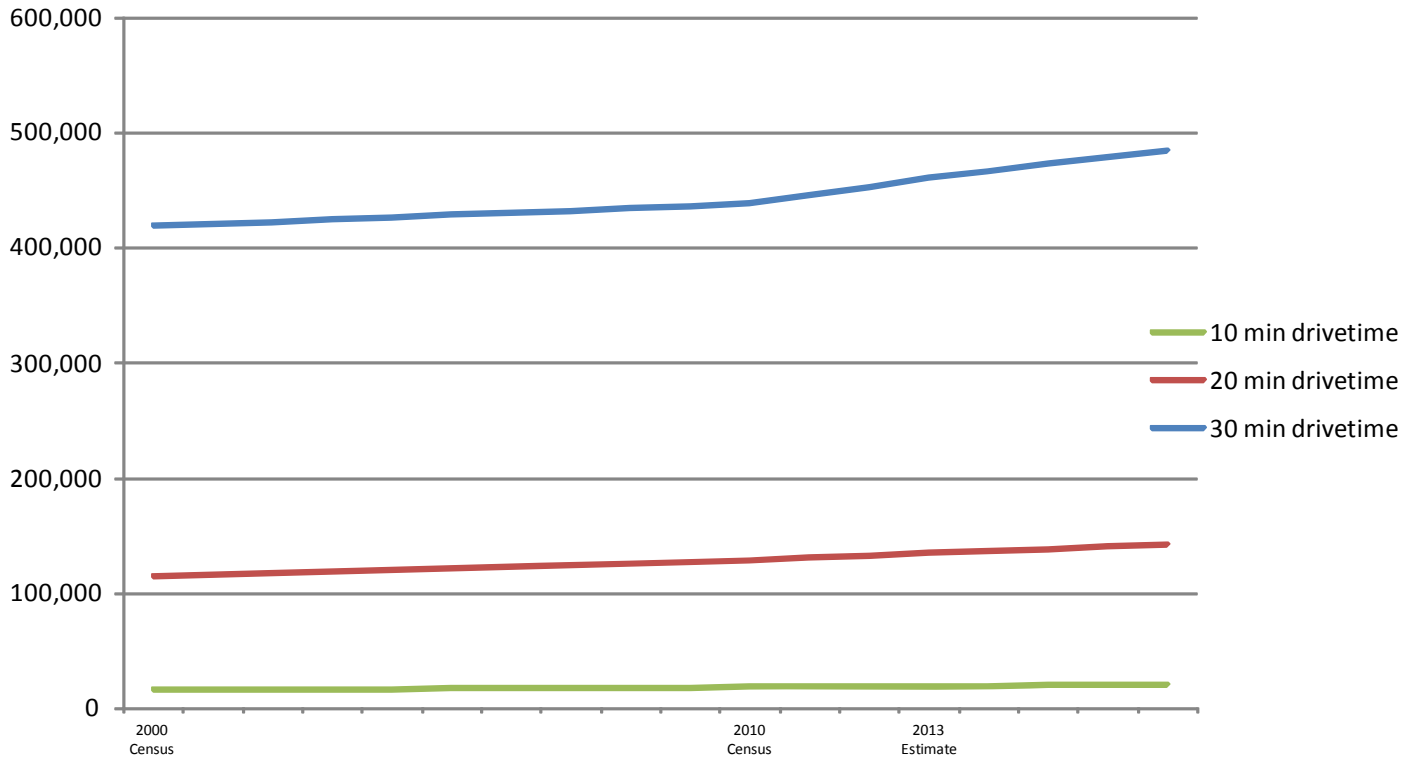
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The City of Skiatook is actively seeking retail development projects to provide its businesses and residents with the convenience of local shopping and dining. Skiatook is ready to begin a retail growth phase to support the residential growth phase of the past ten years. Incentives are available for retailers fitting the city's timeline and identified needs.

POPULATION GROWTH

Population Growth / 2013 / Skiatook

Population Growth

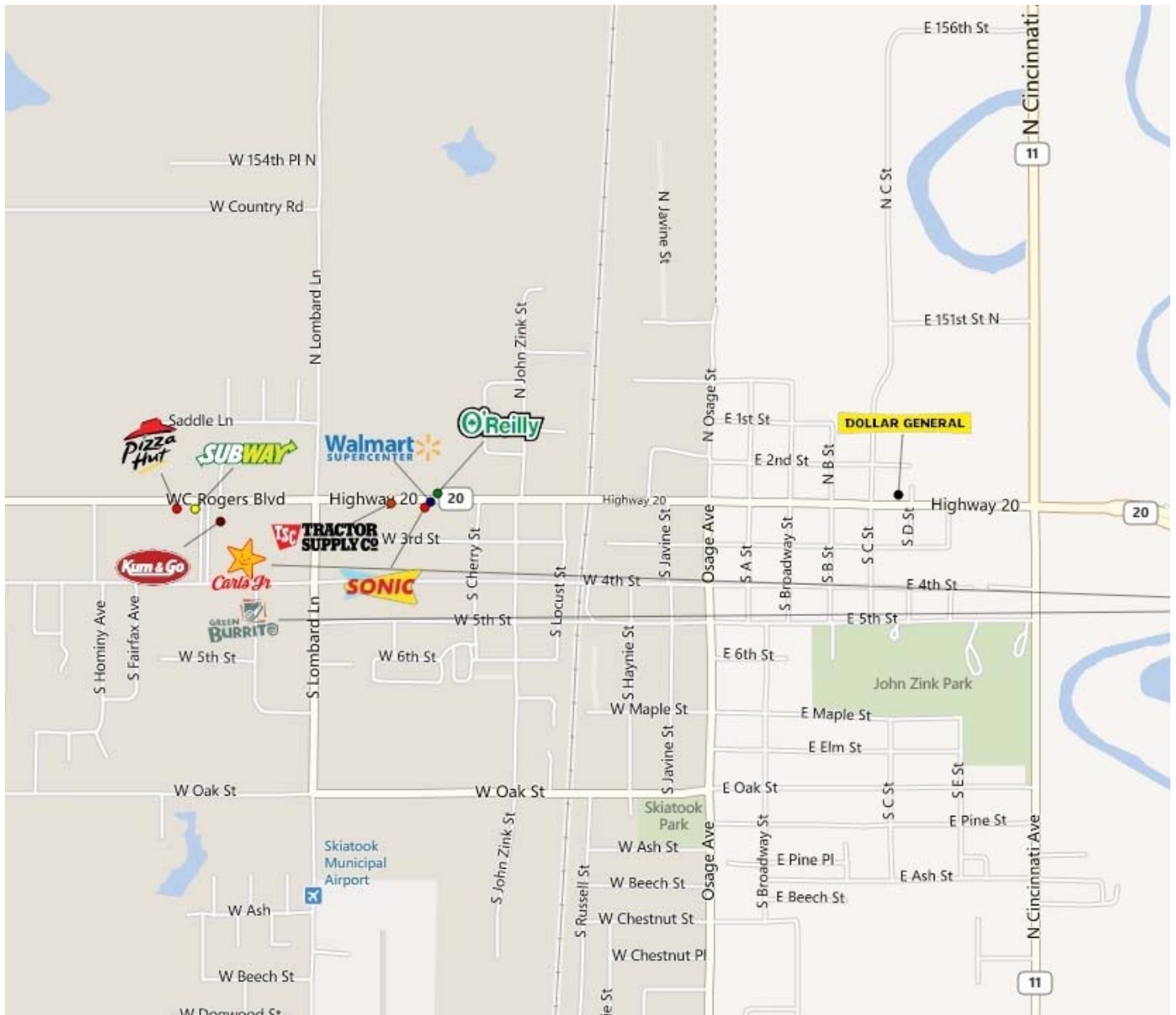


Growth in the 10 minute drivetime around Skiatook is positive, with a 1.73% annual increase in population over the past thirteen years to 19,723 residents and an additional 1.20% of annual growth and a population of 20,911 projected by 2018. The Skiatook city limits population has increased by 1.87% annually over the past thirteen years and is projected to continue to grow through 2018.

	Estimated 2013 Population	Annual Growth 2000-13	Estimated Annual Growth 2013-18
CITY LIMITS	7,438	1.87%	0.30%
5 MILE RADIUS	12,754	1.97%	1.00%
10 MILE RADIUS	50,842	1.75%	1.30%
15 MILE RADIUS	175,565	1.14%	1.30%
10 MINUTE DRIVETIME	19,723	1.73%	1.20%
20 MINUTE DRIVETIME	135,241	1.39%	1.30%
30 MINUTE DRIVETIME	460,569	0.78%	1.30%

## RETAIL ENVIRONMENT

Several national chains are currently located in Skiatook including Walmart, Hibbett Sports, McDonalds, Subway, Pizza Hut, Sonic, O'reillys, and Dollar General. However, the opportunity gap shows that there are still significant leakages in the food & beverage and full service restaurant sectors.



Skiatook serves as the retail source for the nearby towns of Avant, Barnsdall, and Sperry. Residential construction totals show an increase of 655 new residential homes in the past ten years. Benefiting from its location on Highway 20, average daily traffic counts of more than 11,700 vehicles per day travelling to and through Skiatook makes the Skiatook area a regional collection point for retail shopping opportunities.

## ABOUT THE SKIATOOK RETAIL POTENTIAL

### RETAIL ENVIRONMENT

A category with retail leakage indicates revenue leaving a market and an unmet demand in that category. When consumers from an area are spending more for goods than the businesses in that area are providing, that area has retail leakage. Categories with retail leakage suggest that the area can support additional retailers in those categories. Several categories in the areas surrounding Skiatook show significant leakages as shown below.

RETAIL CATEGORY	ANNUAL LEAKAGE		
	5 MILE DRIVE	10 MILE DRIVE	15 MILE DRIVE
Food and Beverage Stores	\$18,292,741	\$33,549,141	\$144,334,140
Non-Store Retailers	\$11,084,672	\$40,837,537	\$200,670,931
Other Build Materials	\$5,774,781	\$21,105,342	(\$113,516,970)
Full Service Restaurants	\$5,035,278	\$21,866,248	\$65,001,276
Limited Service Restaurants	\$4,570,296	\$20,445,797	\$17,848,924
Pharmacies and Drug Stores	\$1,747,681	\$14,249,876	\$13,377,069
Lumberyards	\$2,253,565	\$8,133,457	(\$44,644,441)
Furniture and Home Furnishings	\$1,997,739	\$7,162,155	(\$55,346,935)
Appliances, TVs, Electronics	\$1,763,944	\$5,629,640	(\$9,657,662)
Radio, Television, Electronics	\$1,411,455	\$5,448,431	(\$11,053,655)
Hardware	\$1,249,246	(\$3,206,416)	(\$5,866,271)
Home Centers	\$4,183,382	\$1,704,011	(\$34,475,436)
<b>TOTAL RETAIL LEAKAGE</b>	<b>\$109,738,456</b>	<b>\$368,654,833</b>	<b>\$757,080,512</b>

## ABOUT THE SKIATOOK RETAIL POTENTIAL

### RETAIL ENVIRONMENT

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RETAIL CATEGORY	ANNUAL LEAKAGE		
	10 MIN RING	20 MIN RING	30 MIN RING
Food and Beverage Stores	\$18,292,741	\$33,549,141	\$144,334,140
Non-Store Retailers	\$11,084,672	\$40,837,537	\$200,670,931
Other Build Materials	\$5,774,781	\$21,105,342	(\$113,516,970)
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Limited Service Restaurants	\$4,570,296	\$20,445,797	\$17,848,924
Home Centers	\$4,183,382	\$1,704,011	(\$34,475,436)
Lumberyards	\$2,253,565	\$8,133,457	(\$44,644,441)
Family Clothing	\$2,600,980	\$9,233,043	(\$13,628,995)
Appliances, TVs, Electronics	\$1,763,944	\$5,629,640	(\$9,657,662)
Pharmacies and Drug Stores	\$1,747,681	\$14,249,876	\$13,377,069
Radio, Television, Electronics	\$1,411,455	\$5,448,431	(\$11,053,655)
Hardware	\$1,249,246	(\$3,206,416)	(\$5,866,271)
<b>TOTAL RETAIL LEAKAGE</b>	<b>\$82,636,165</b>	<b>\$262,751,045</b>	<b>\$755,848,963</b>



### ACTION ITEMS

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Cities can and should take every available opportunity to create an environment that invites private sector investment. Below is a list of proven strategies that give cities an advantage when being evaluated by investors.

Engage the entire community to establish ownership, support, and participation from a broad cross-section of the stakeholders.

Develop a cooperative effort from local governing bodies including city, county, state, school and other community organizations.

Develop and enhance the depth and consistency of the pool of individuals for local leadership and develop a shared vision for leadership of the community.

Improve the image of the community in terms of aesthetics. Cleanup, beautify, and do whatever is feasible to present the best "look" for the city.

Develop short and long-range plans to deal with new growth and the maintenance of infrastructure systems including transportation, water, sanitary sewer, and storm sewer. This will allow the community to be able to accommodate potential development investments in an efficient and timely manner.

Develop and modernize IT infrastructure including an up to date city and ED website, staying active in social media, and providing adequate internet speeds to businesses and residents.

Develop modern, up-to-date, accurate and informative marketing material.

Develop a strategy for incentives and public-private partnerships that are effective and make sense for the community. Evaluate opportunities to pursue Tax Increment Financing (TIF) Districts and Tax Increment Reinvestment Zones.

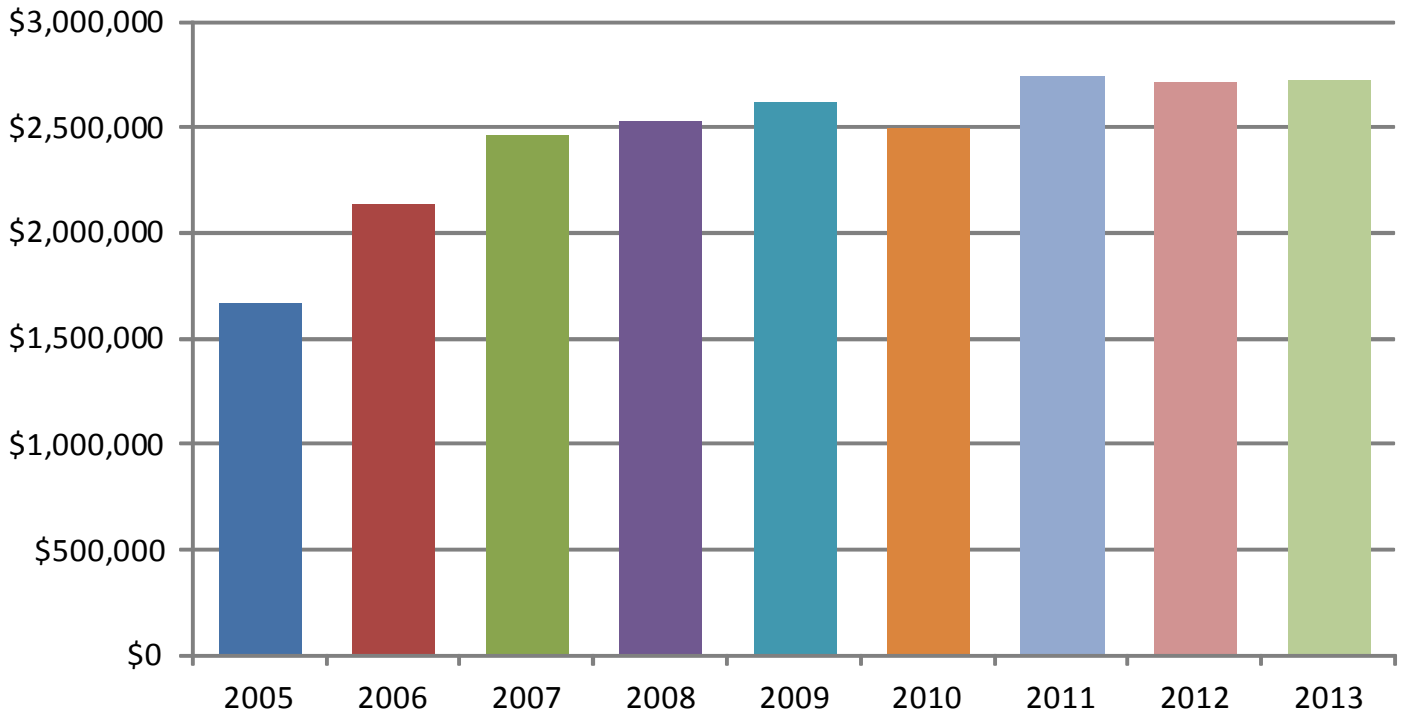
Identify and pursue grant funding opportunities when available.

Assess city's development protocol with the goal of making the process as efficient as possible. Identify and train key personnel so that when opportunity knocks, the community responds immediately.

SALES TAX REVENUE

*Sales Tax Revenue / 2013 / Skiatook City Limits*

**City Sales Tax Revenue**

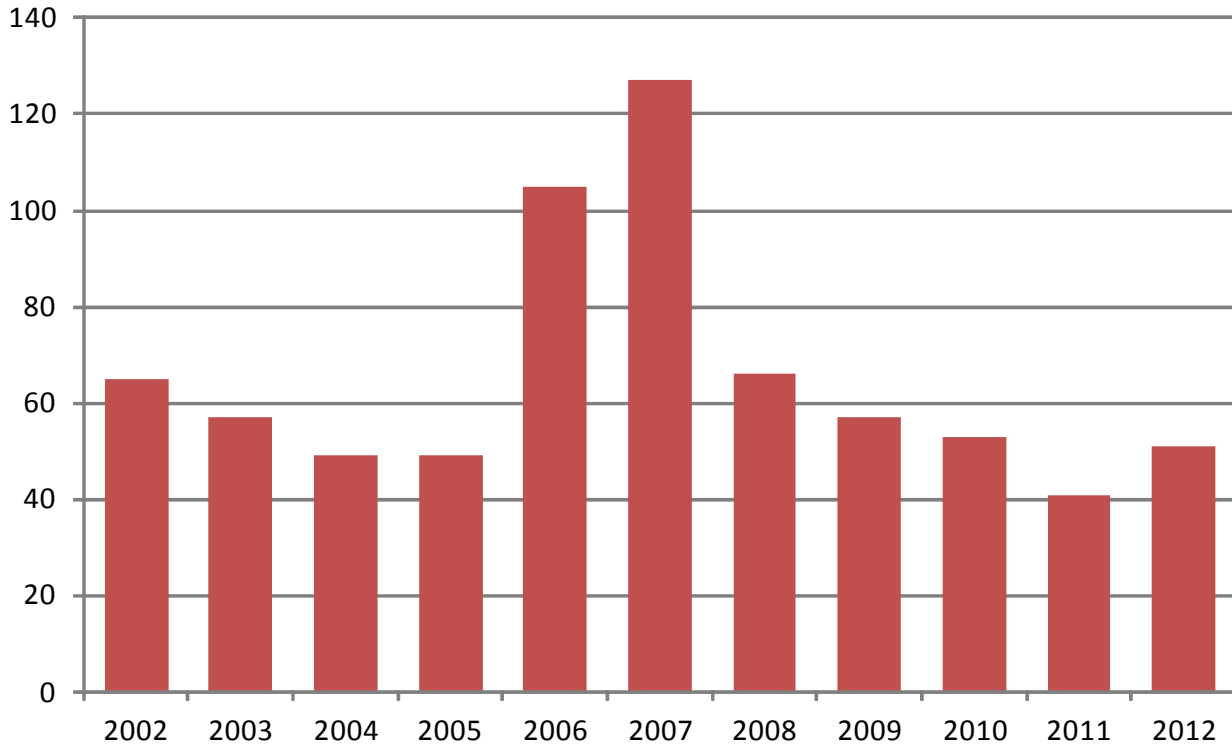


Sales tax revenue is an indicator of the health of the existing retailers and in turn the city government. As shown in the above chart, the sales tax revenue has shown a steady increase in retail sales in the community over the last 9 years indicating fiscal health.

BUILDING PERMIT INFORMATION

*Building Permits / 2013 / Skiatook*

**Residential Building Permits**

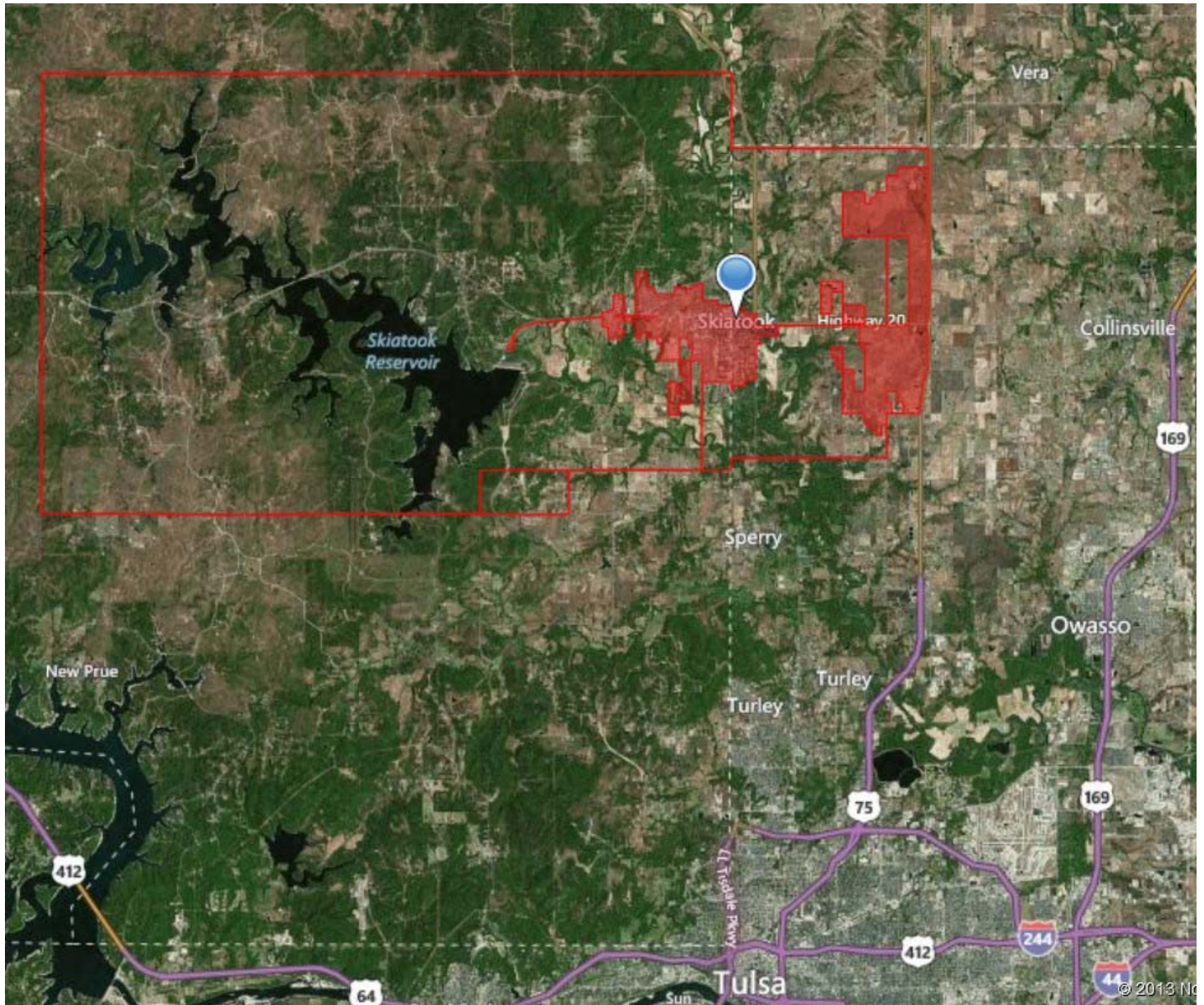


Building permits reflect the residential and commercial growth of a community. The data indicates strong residential growth which increases the customer base and the amount of disposable income available to new and existing retailers.

# DEMOGRAPHIC PROFILE - CITY LIMITS

## AREA MAP

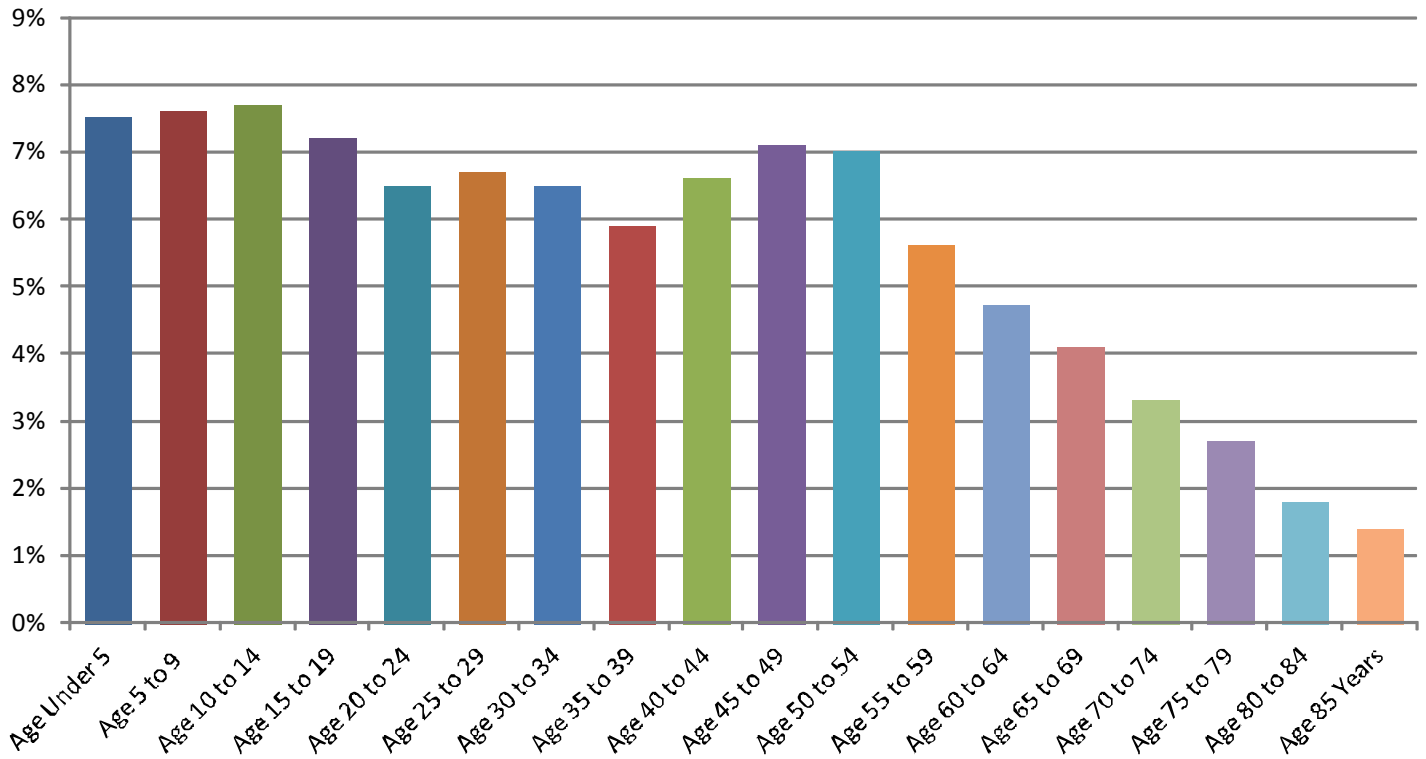
This map shows the highways that service the area and the surrounding communities. The city limits data gives a good representation of the centrally concentrated population in an area.



POPULATION BY AGE

Population by Age / 2013 / Skiatook City Limits

Age Classification 2013

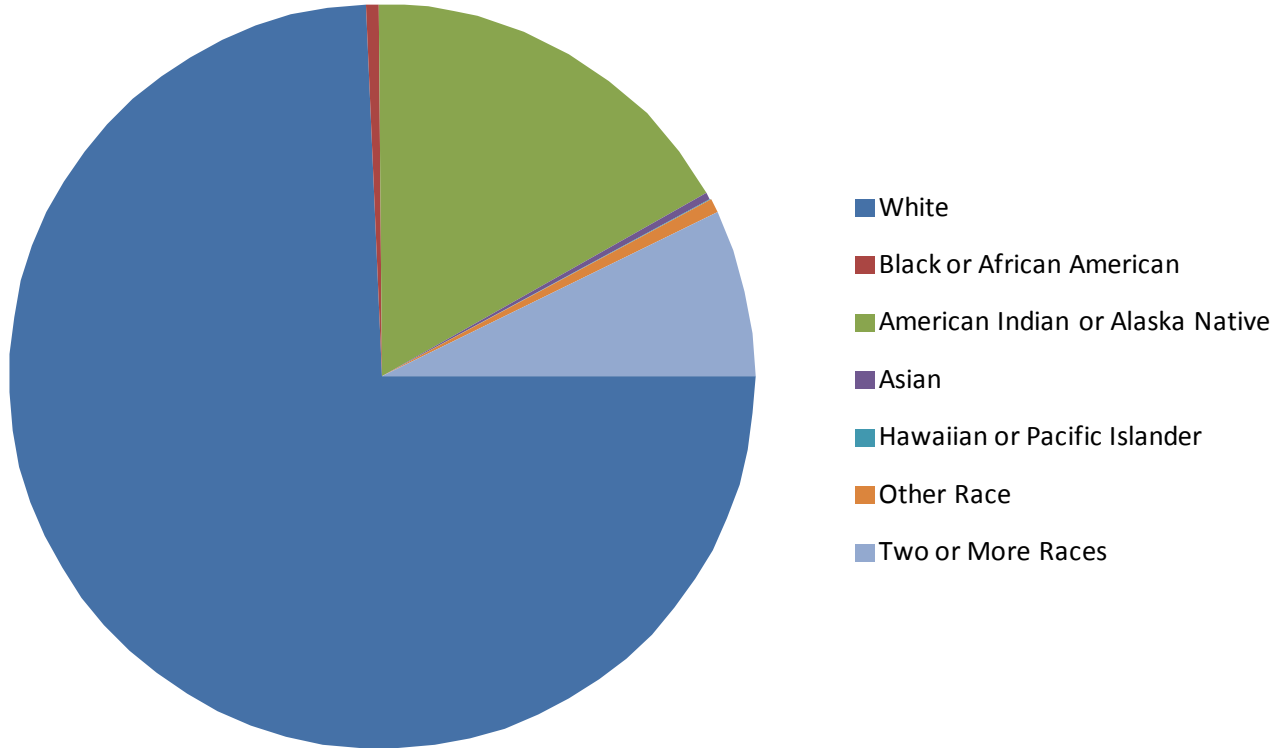


Most retailers desire a market with a heavy concentration of consumers between the ages of 25 and 44 years old. The city limits of Skiatook has 25.70 percent of their market between the ages of 25 and 44, and the median age is 34.20 years old.

POPULATION BY RACE

Population by Race / 2013 / Skiatook City Limits

Single Race Classification 2013

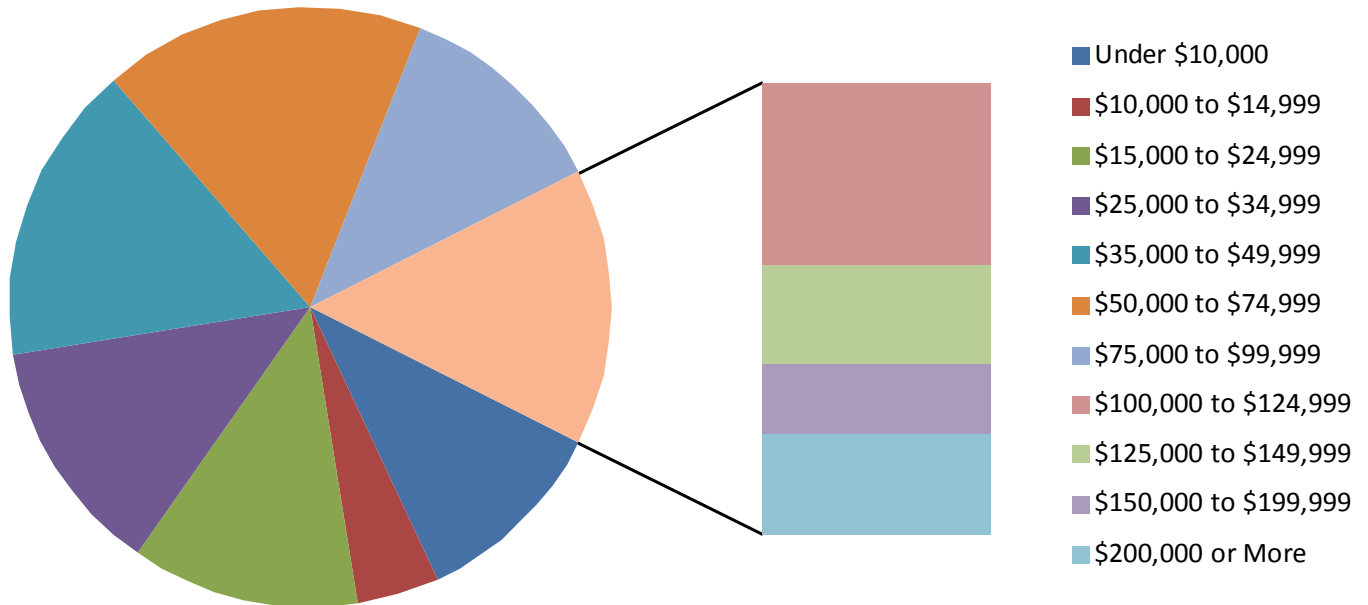


The population of the city limits area of Skiatook has 74.30% White residents, 0.50% Black or African American residents, and 17.00% American Indian or Alaska Native residents. 3.30% of the population is Hispanic or Latino by origin.

POPULATION BY INCOME

Population by Income / 2013 / Skiatook City Limits

Household Income 2013



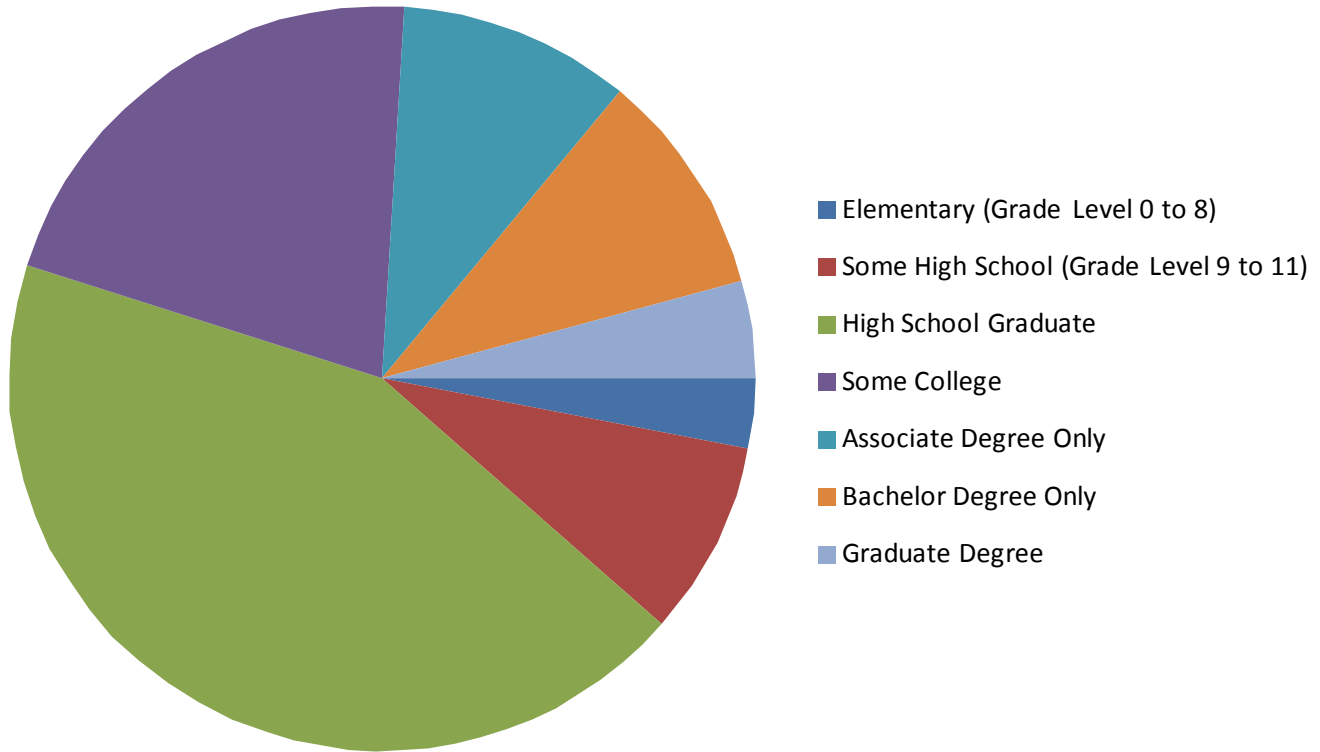
The average household income in the Skiatook city limits is \$56,186.00. Of the households in the Skiatook city limits, 43.70% have an average annual income at or above \$50,000, and 72.50% are family households.

2013 Household Income (Estimated)	
CITY LIMITS	\$56,186
5 MILE RADIUS	\$59,709
10 MILE RADIUS	\$59,767
15 MILE RADIUS	\$53,682
10 MINUTE DRIVETIME	\$58,987
20 MINUTE DRIVETIME	\$55,143
30 MINUTE DRIVETIME	\$58,070

POPULATION BY EDUCATION

Population by Education / 2013 / Skiatook City Limits

**Educational Attainment 2013**



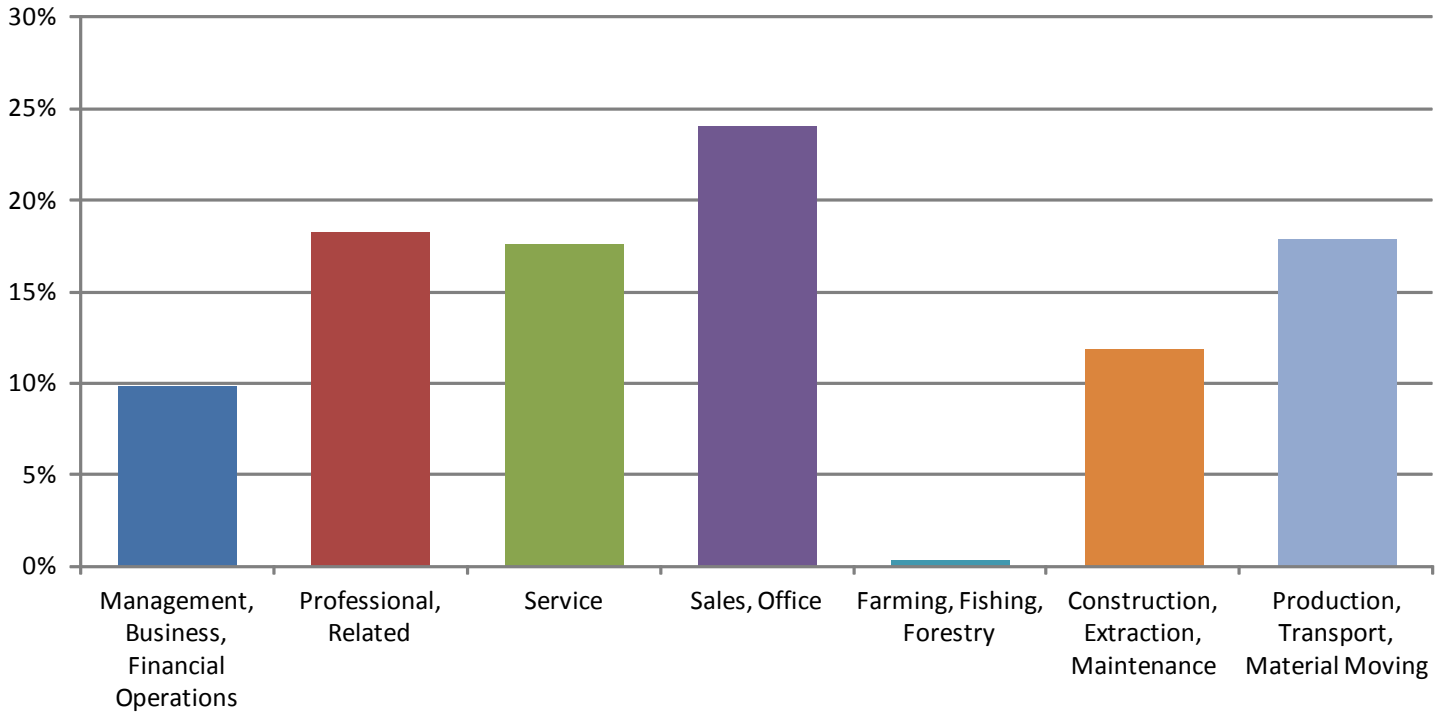
Of the population age 16 and over in the Skiatook city limits, 21.00% have some post-secondary education, and 24.10% have a college degree.



POPULATION BY OCCUPATION

Population by Occupation / 2013 / Skiatook City Limits

**Occupational Classification,  
Employed Population Aged 16+**

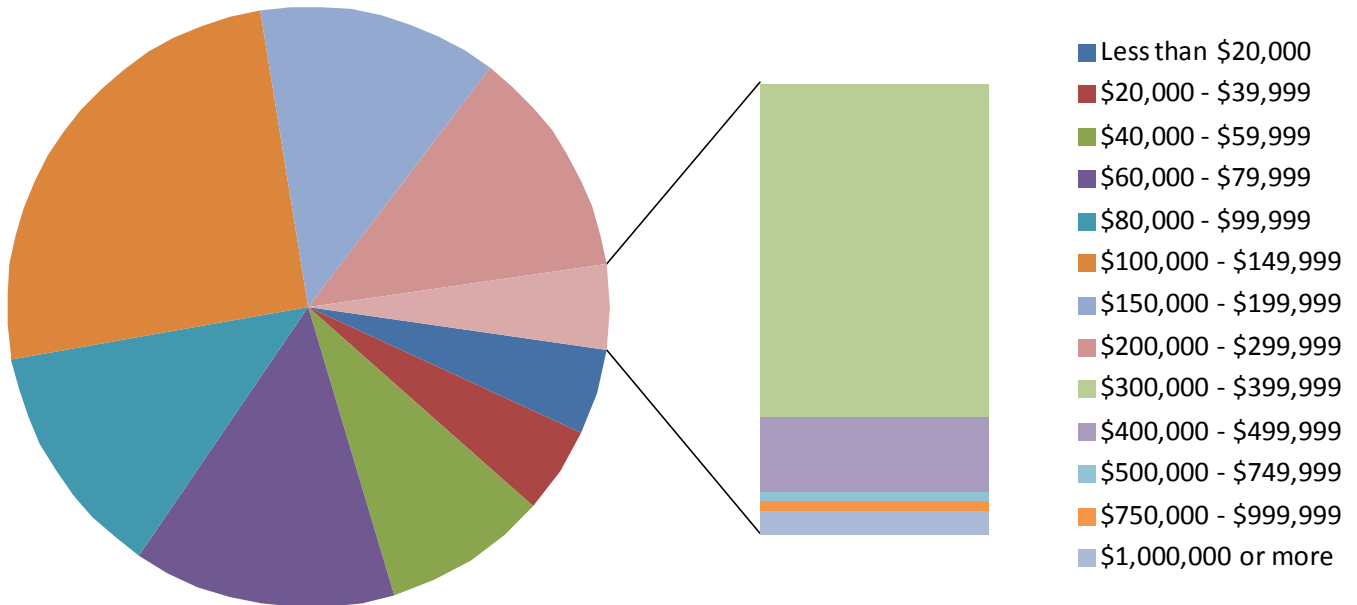


Of the population in the Skiatook city limits, 52.20% is engaged in white collar occupations, with 18.20% in professional occupations and another 9.90% in management, business and financial operations. Of the population in the Skiatook city limits, 47.80% is engaged in blue collar occupations with 11.90% in construction and maintenance and 17.90% in production and transport.

HOUSING VALUE DISTRIBUTION

*Housing Value Distribution / 2013 / Skiatook City Limits*

**Housing Value Distribution 2013**

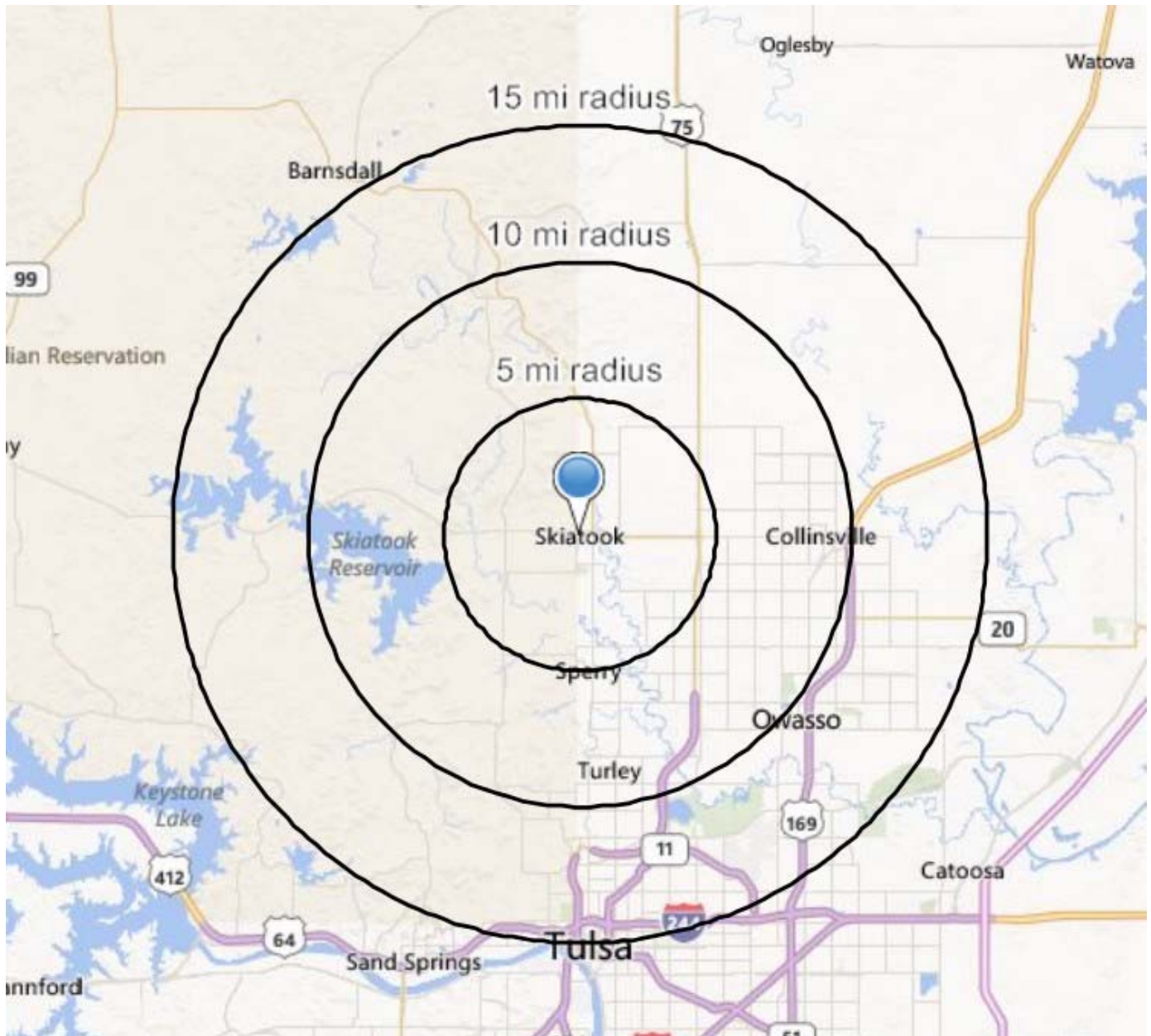


The median value of a home in the city limits of Skiatook is \$110,028.00. Of these homes, 72.21% are owner occupied and 19.50% were built since 2000.

# DEMOGRAPHIC PROFILE - CONCENTRIC RINGS

## AREA MAP

Concentric ring data shows the demographic make-up for a 5, 10 and 15 mile radius around Skiatook. The appropriate ring diameter is determined by the retail draw of the retailer. Drivetimes are good for a quick overview but neighboring markets, traffic flow, accessibility and convenience must be taken into account.

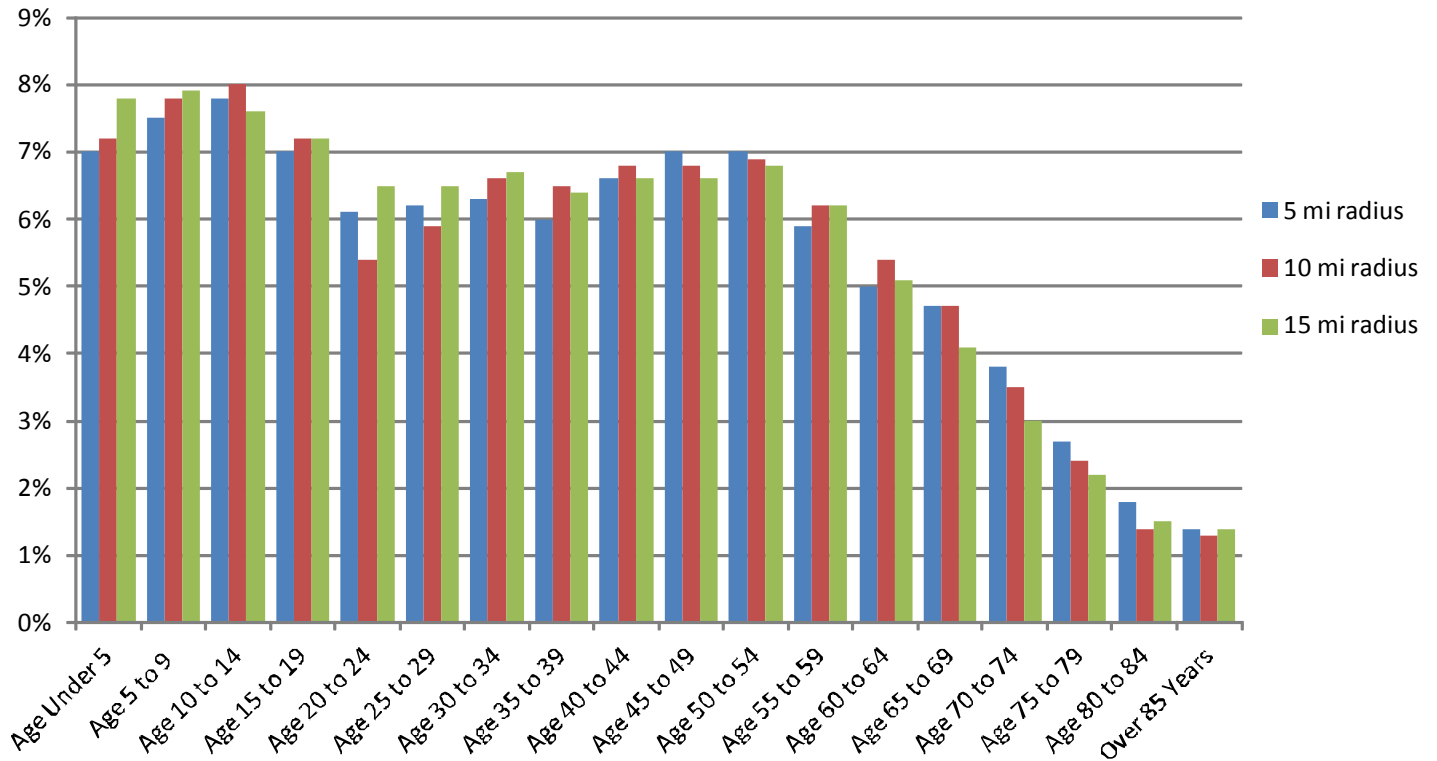


# DEMOGRAPHIC PROFILE - CONCENTRIC RINGS

## POPULATION BY AGE

Population by Age / 2013 / Skiatook Concentric Rings

### Age Classification 2013



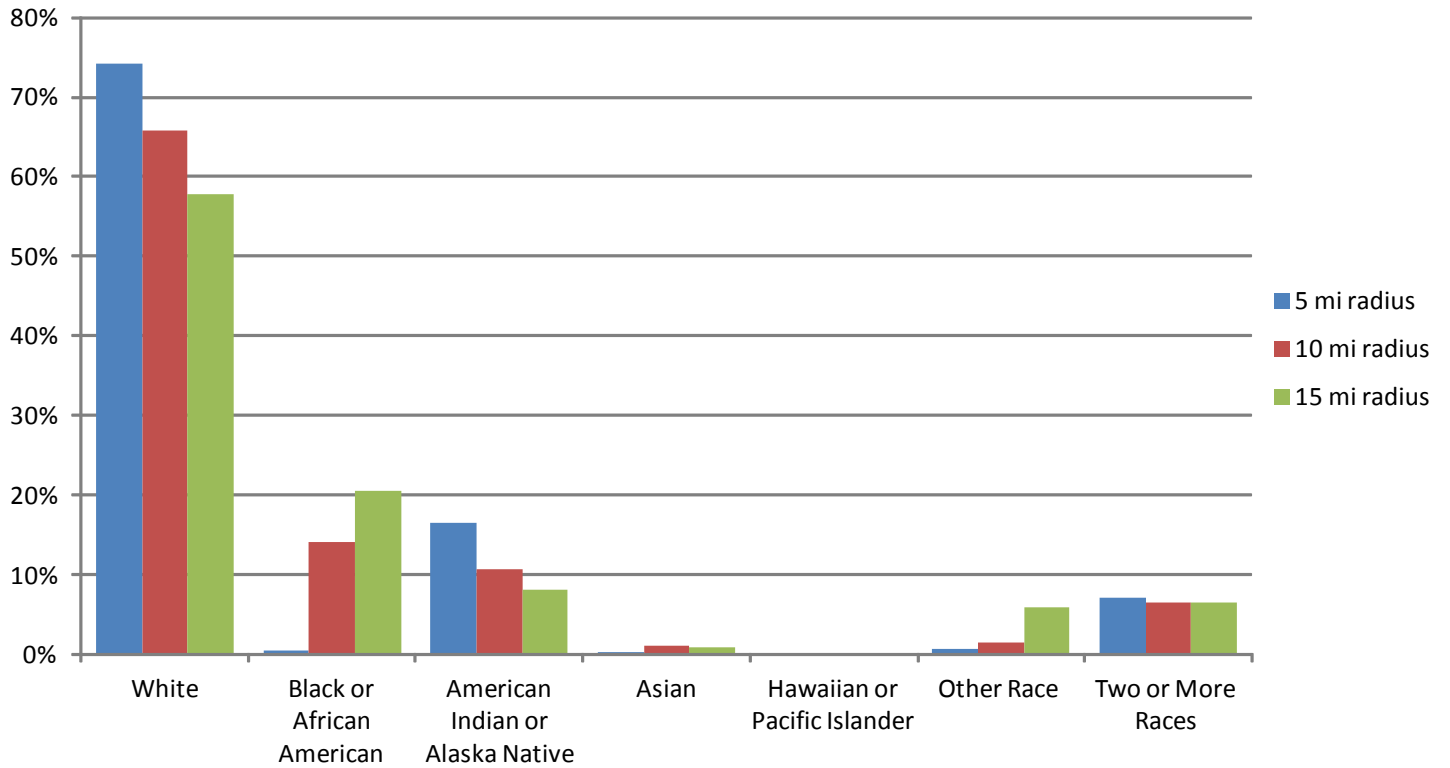
Most retailers desire a market with a heavy concentration of consumers between the ages of 25 and 44 years old. The concentric rings of Skiatook has 25.10 percent of their market between the ages of 25 and 44, and the median age is 34.50 years old.

# DEMOGRAPHIC PROFILE - CONCENTRIC RINGS

## POPULATION BY RACE

Population by Race / 2013 / Skiatook Concentric Rings

### Single Race Classification 2013



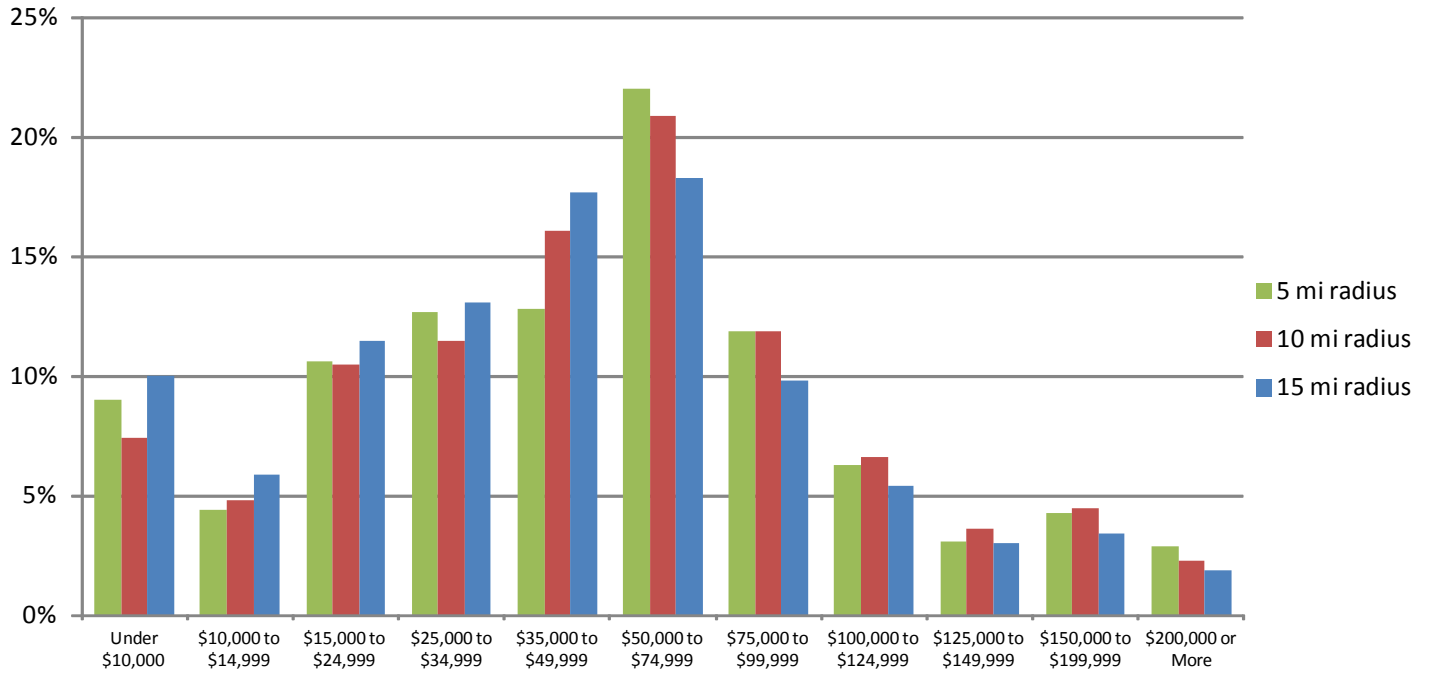
The population of the concentric rings area of Skiatook has 57.80% White residents, 20.60% Black or African American residents, and 8.10% American Indian or Alaska Native residents. 11.40% of the population is Hispanic or Latino by origin.

# DEMOGRAPHIC PROFILE - CONCENTRIC RINGS

## POPULATION BY INCOME

Population by Income / 2013 / Skiatook Concentric Rings

### Household Income 2013



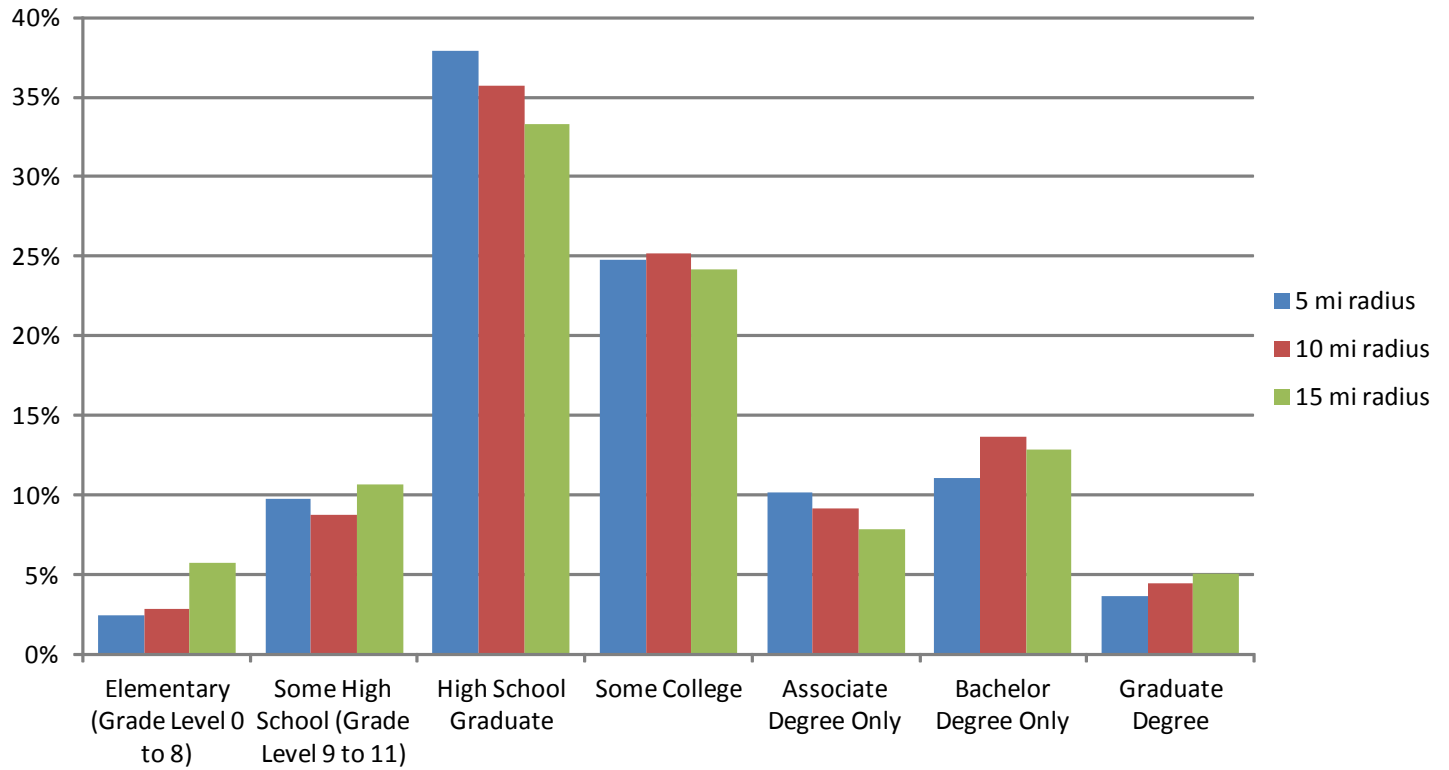
The average household income in the Skiatook concentric rings is \$53,682.00. Of the households in the Skiatook concentric rings, 41.80% have an average annual income at or above \$50,000, and 69.10% are family households.

2013 Household Income (Estimated)	
CITY LIMITS	\$56,186
5 MILE RADIUS	\$59,709
10 MILE RADIUS	\$59,767
15 MILE RADIUS	\$53,682
10 MINUTE DRIVETIME	\$58,987
20 MINUTE DRIVETIME	\$55,143
30 MINUTE DRIVETIME	\$58,070

## POPULATION BY EDUCATION

*Population by Education / 2013 / Skiatook Concentric Rings*

### Educational Attainment 2013



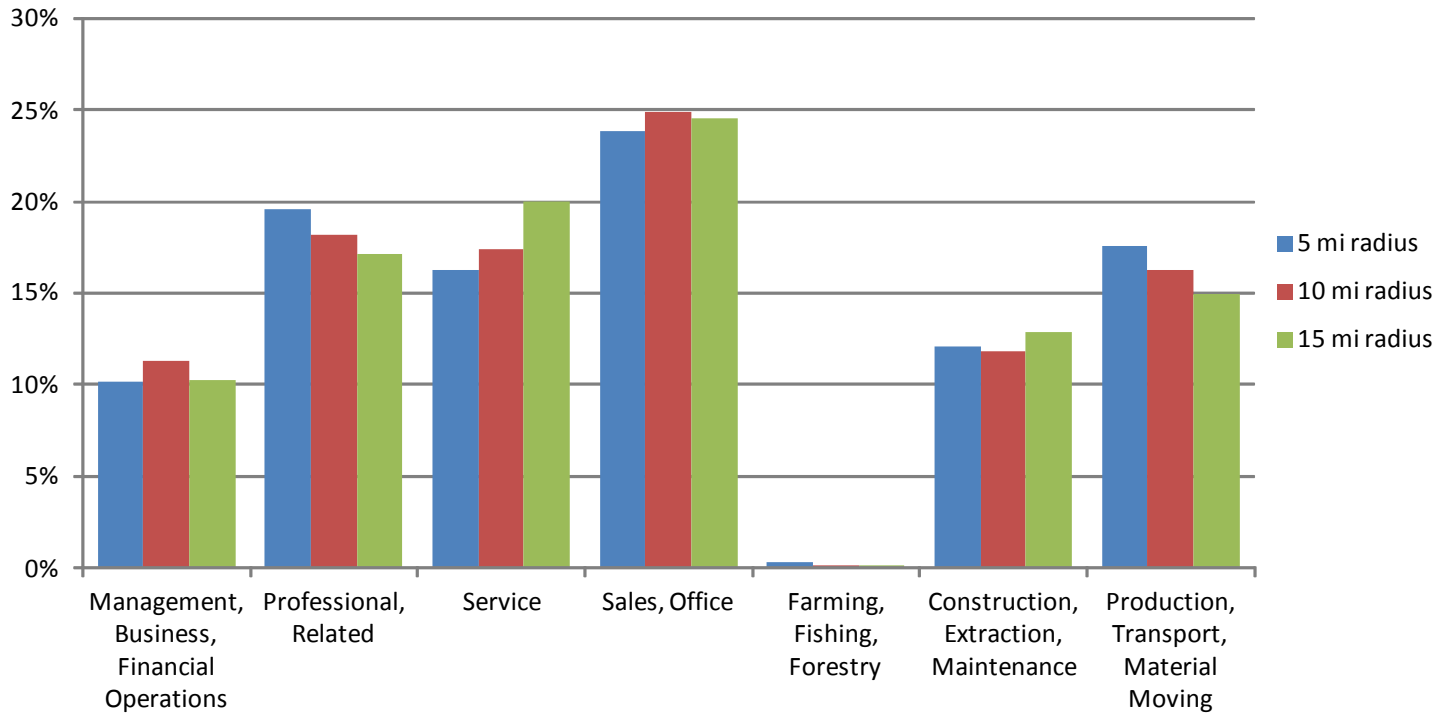
Of the population age 16 and over in the Skiatook concentric rings, 24.20% have some post-secondary education, and 25.90% have a college degree.

# DEMOGRAPHIC PROFILE - CONCENTRIC RINGS

## POPULATION BY OCCUPATION

*Population by Occupation / 2013 / Skiatook Concentric Rings*

### Occupational Classification, Employed Population Aged 16+



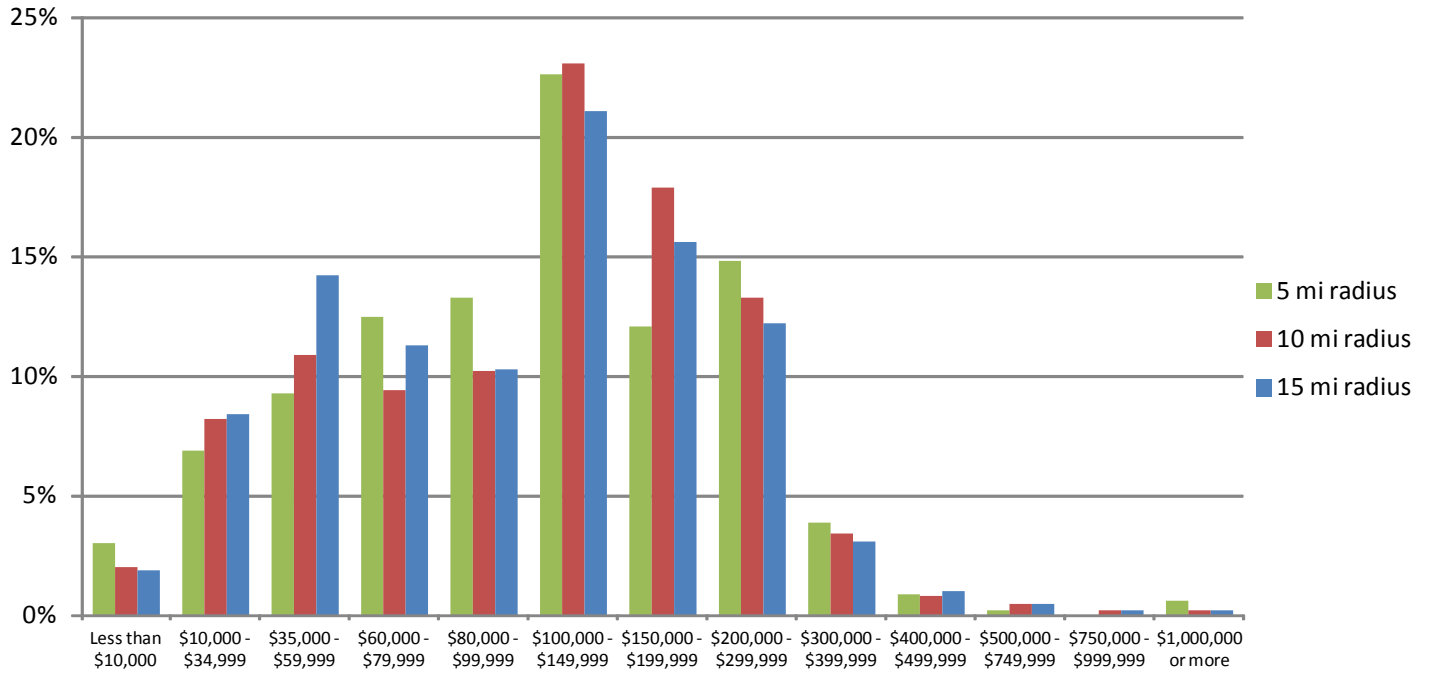
Of the population in the Skiatook concentric rings, 51.90% is engaged in white collar occupations, with 17.10% in professional occupations and another 10.30% in management, business and financial operations. Of the population in the Skiatook concentric rings, 48.10% is engaged in blue collar occupations with 12.90% in construction and maintenance and 15.00% in production and transport.



HOUSING VALUE DISTRIBUTION

Housing Value Distribution / 2013 / Skiatook Concentric Rings

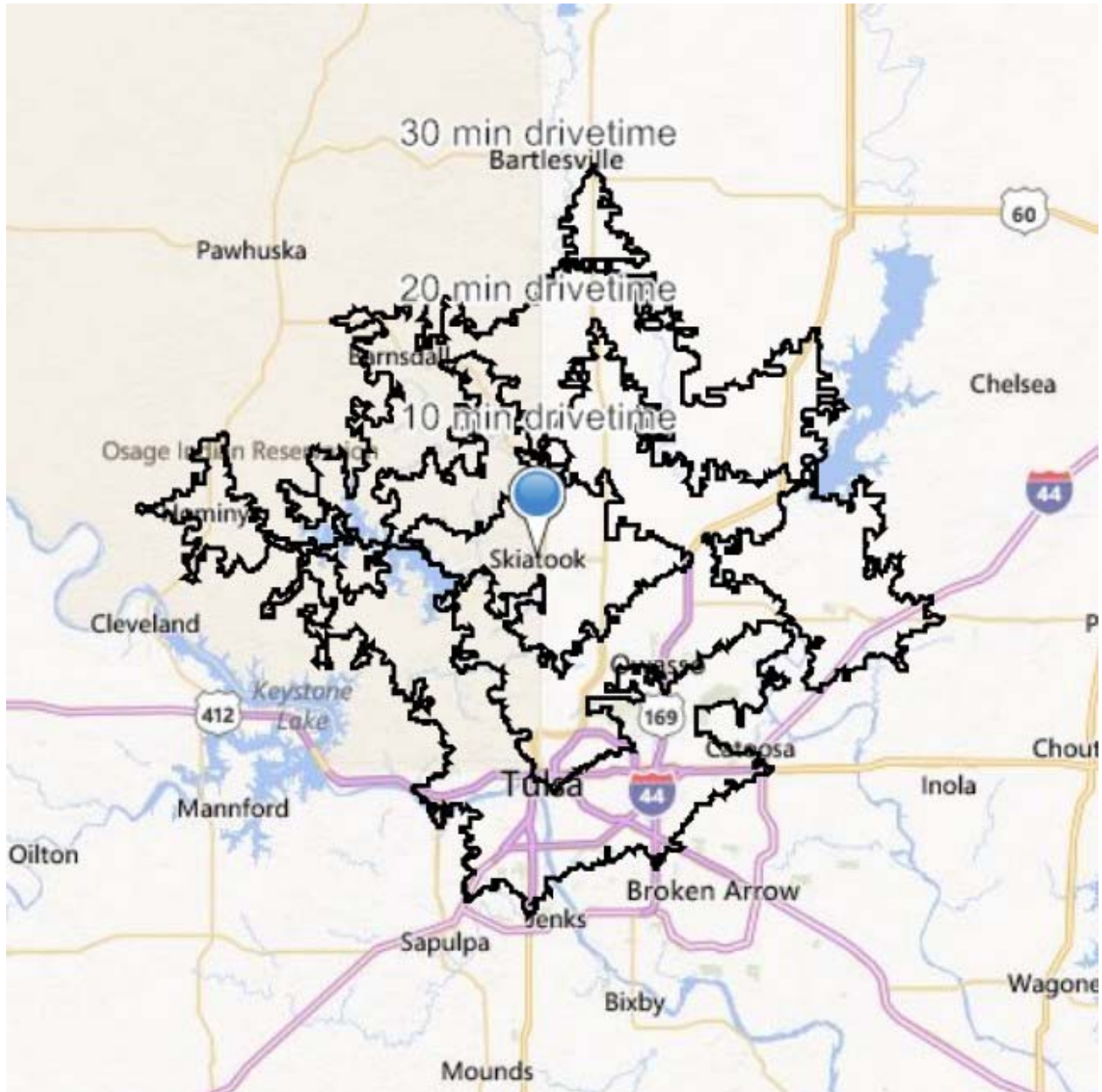
Housing Value Distribution 2013



The median value of a home in the concentric rings around Skiatook is \$114,141.00. Of these homes, 75.97% are owner occupied and 19.02% were built since 2000.

## AREA MAP

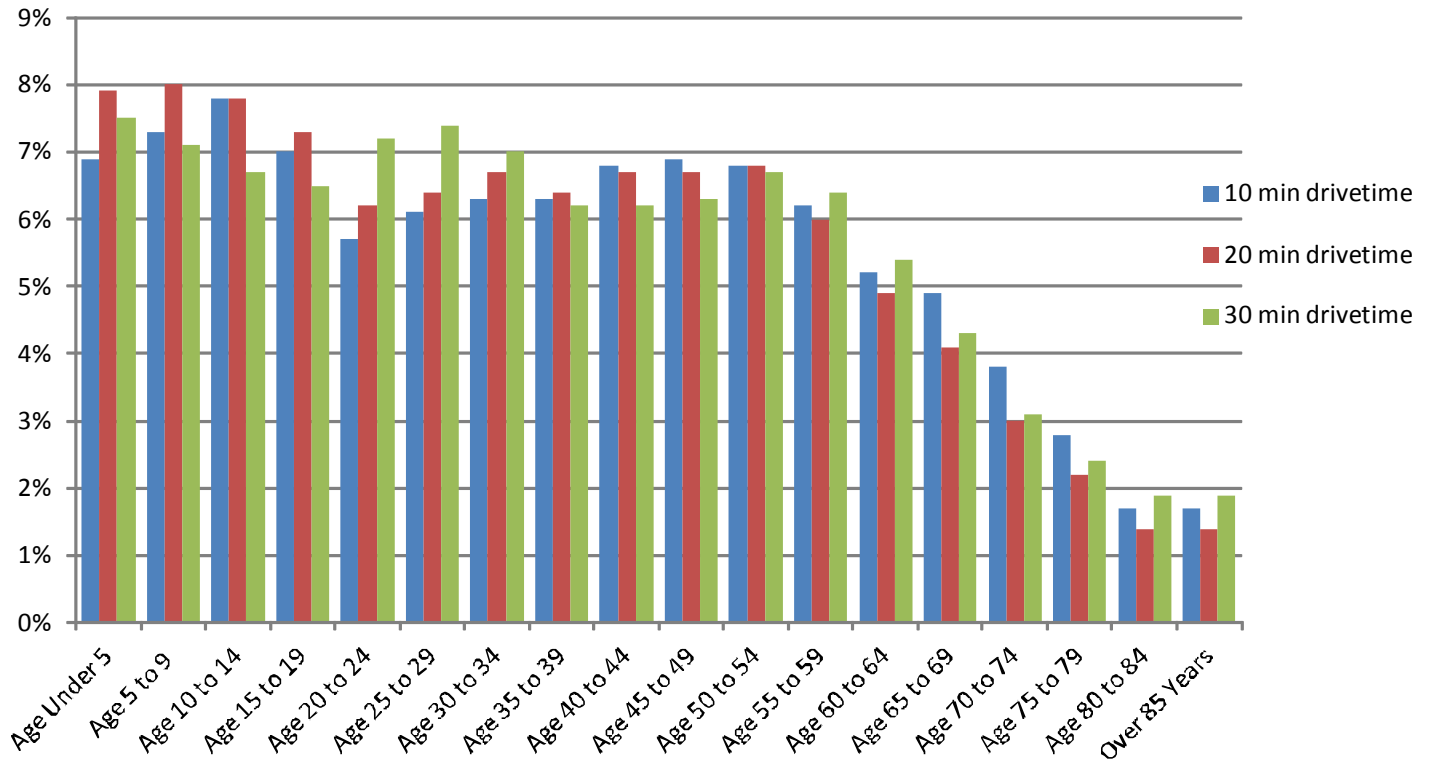
This data represents the consumers located within a 10, 20 and 30 minute drive of Skiatook. The appropriate drivetime is determined by the retail draw of the retailer. Drivetimes are good for a quick overview but neighboring markets, traffic flow, accessibility and convenience must be taken into account.



POPULATION BY AGE

Population by Age / 2013 / Skiatook Drivetimes

Age Classification 2013

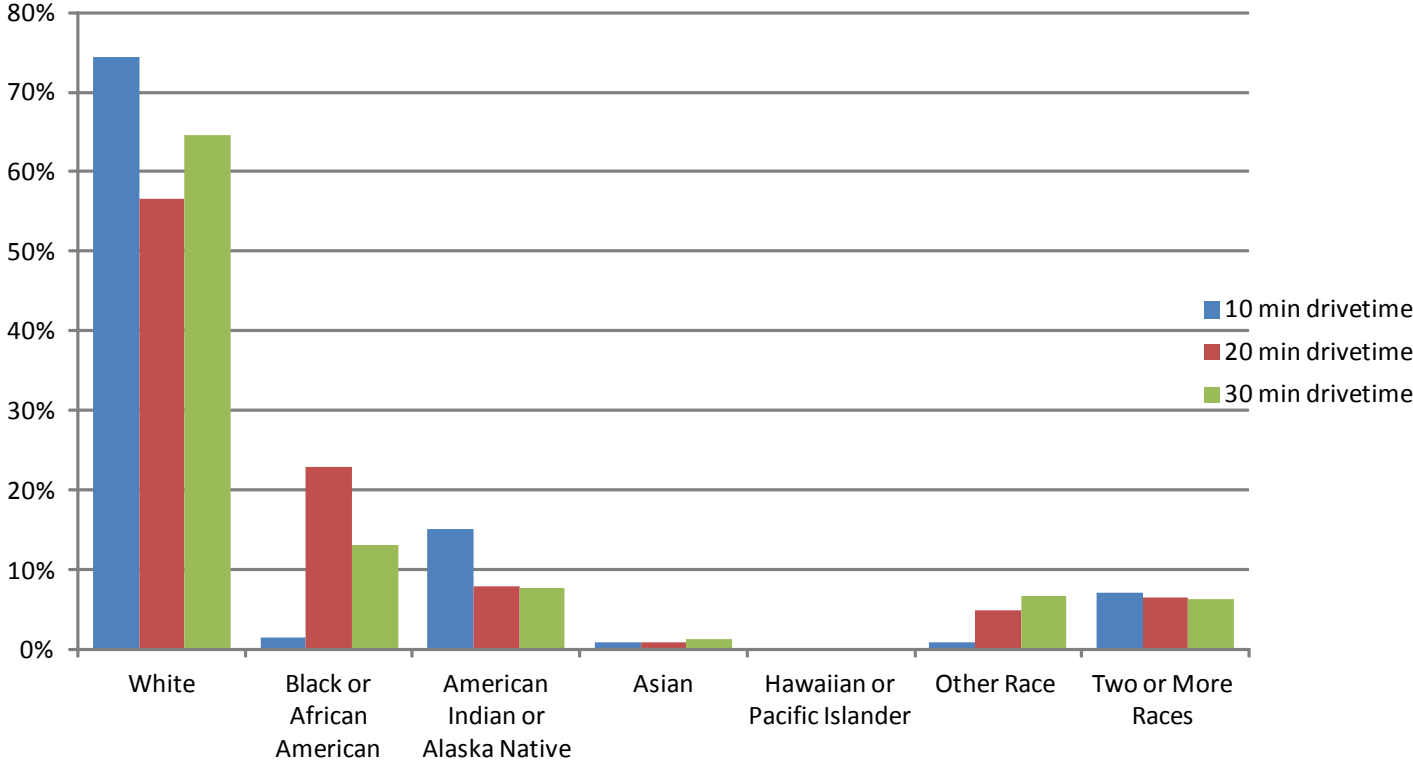


Most retailers desire a market with a heavy concentration of consumers between the ages of 25 and 44 years old. The drivetimes of Skiatook has 25.50 percent of their market between the ages of 25 and 44, and the median age is 34.20 years old.

POPULATION BY RACE

Population by Race / 2013 / Skiatook Drivetimes

Single Race Classification 2013

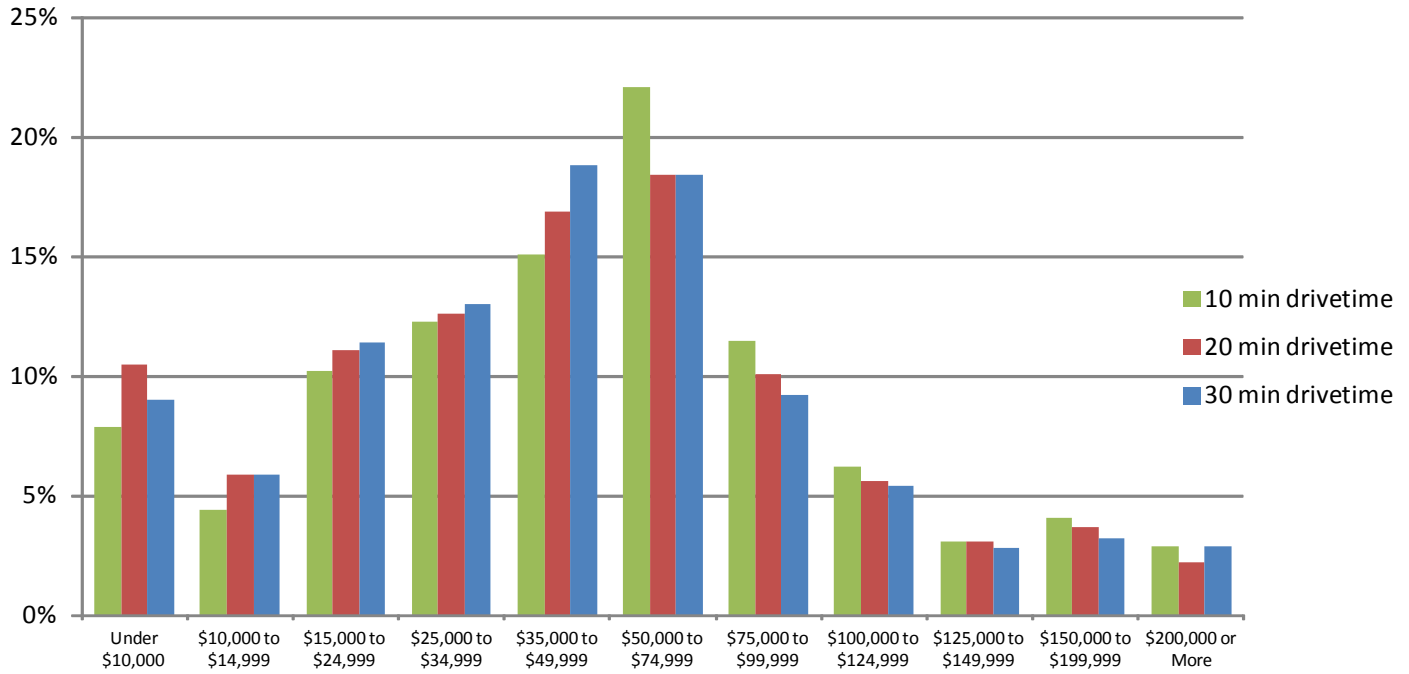


The population of the drivetimes area of Skiatook has 56.50% White residents, 23.00% Black or African American residents, and 7.90% American Indian or Alaska Native residents. 9.80% of the population is Hispanic or Latino by origin.

POPULATION BY INCOME

Population by Income / 2013 / Skiatook Drivetimes

Household Income 2013



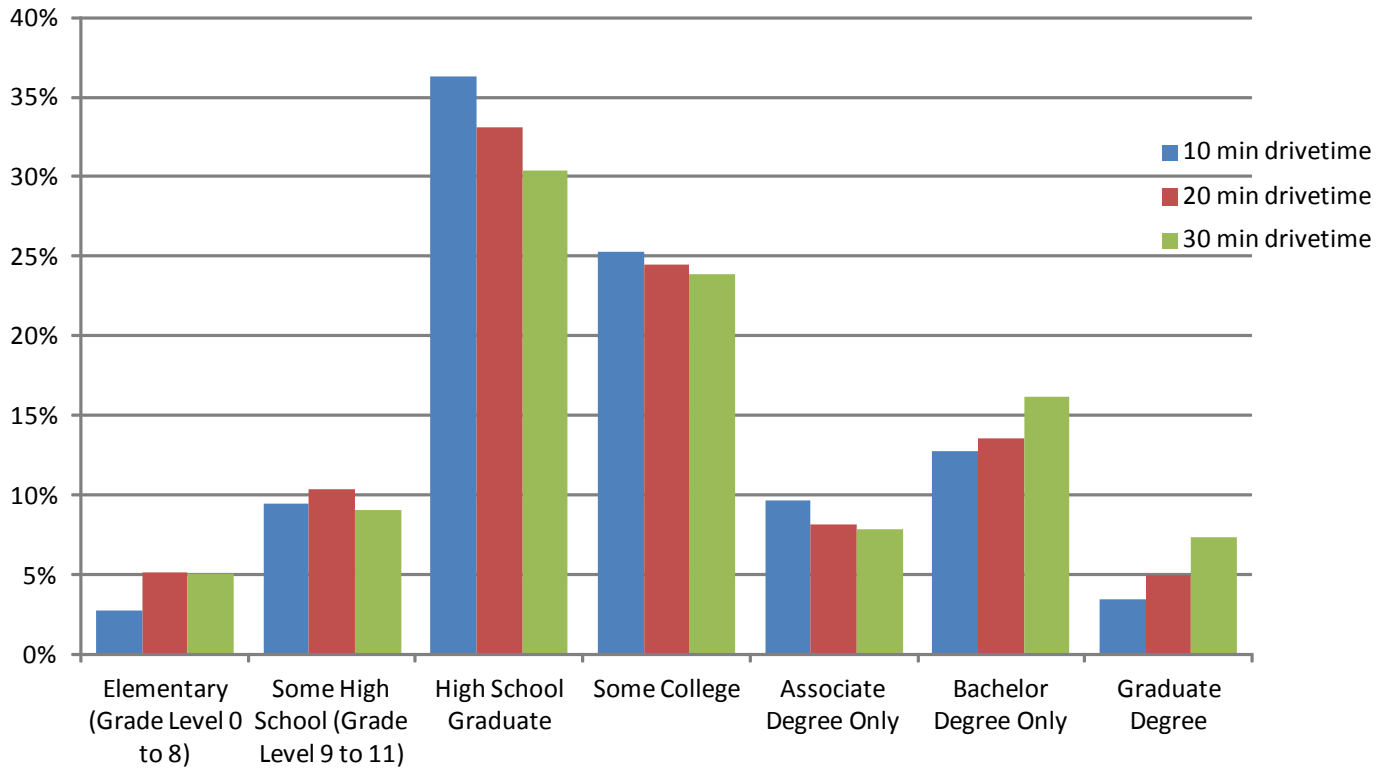
The average household income in the Skiatook drivetimes is \$55,143.00. Of the households in the Skiatook drivetimes, 43.10% have an average annual income at or above \$50,000, and 70.40% are family households.

2013 Household Income (Estimated)	
CITY LIMITS	\$56,186
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POPULATION BY EDUCATION

Population by Education / 2013 / Skiatook Drivetimes

**Educational Attainment 2013**

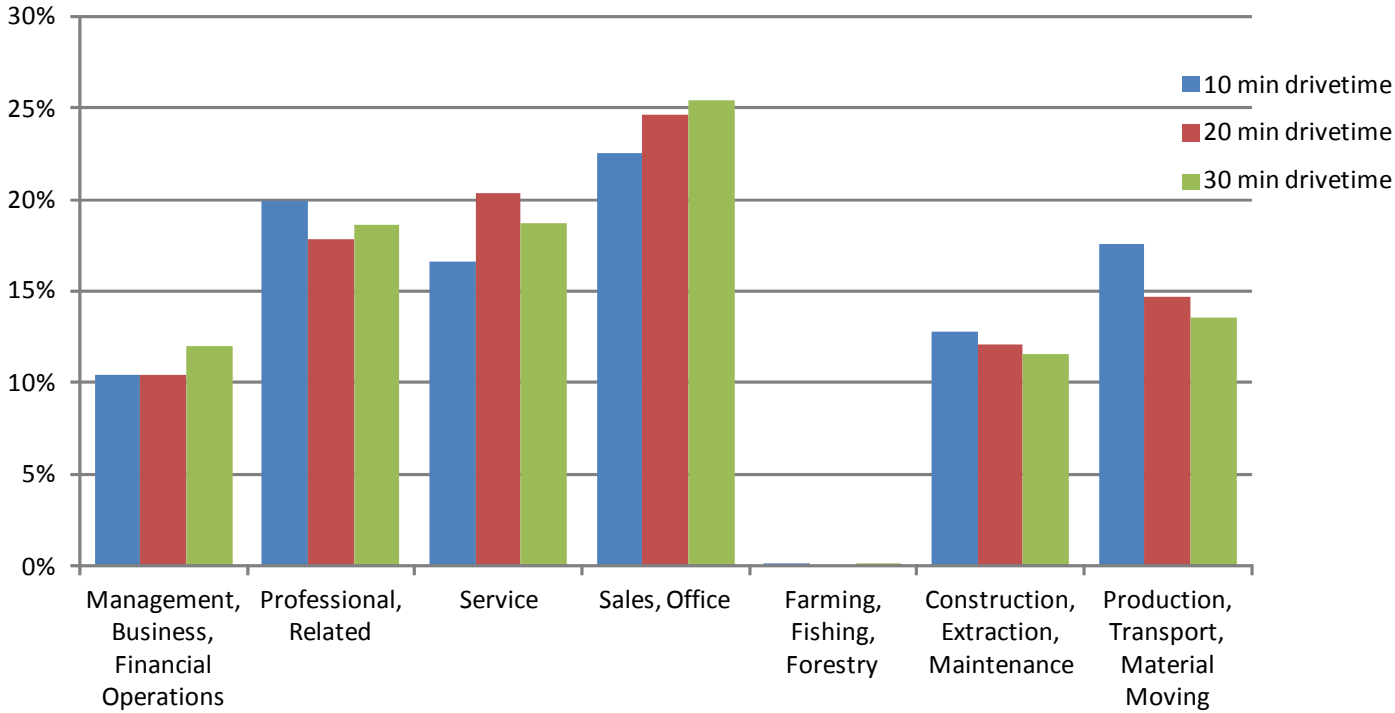


Of the population age 16 and over in the Skiatook drivetimes, 24.50% have some post-secondary education, and 26.80% have a college degree.

POPULATION BY OCCUPATION

Population by Occupation / 2013 / Skiatook Drivetimes

**Occupational Classification,  
Employed Population Aged 16+**

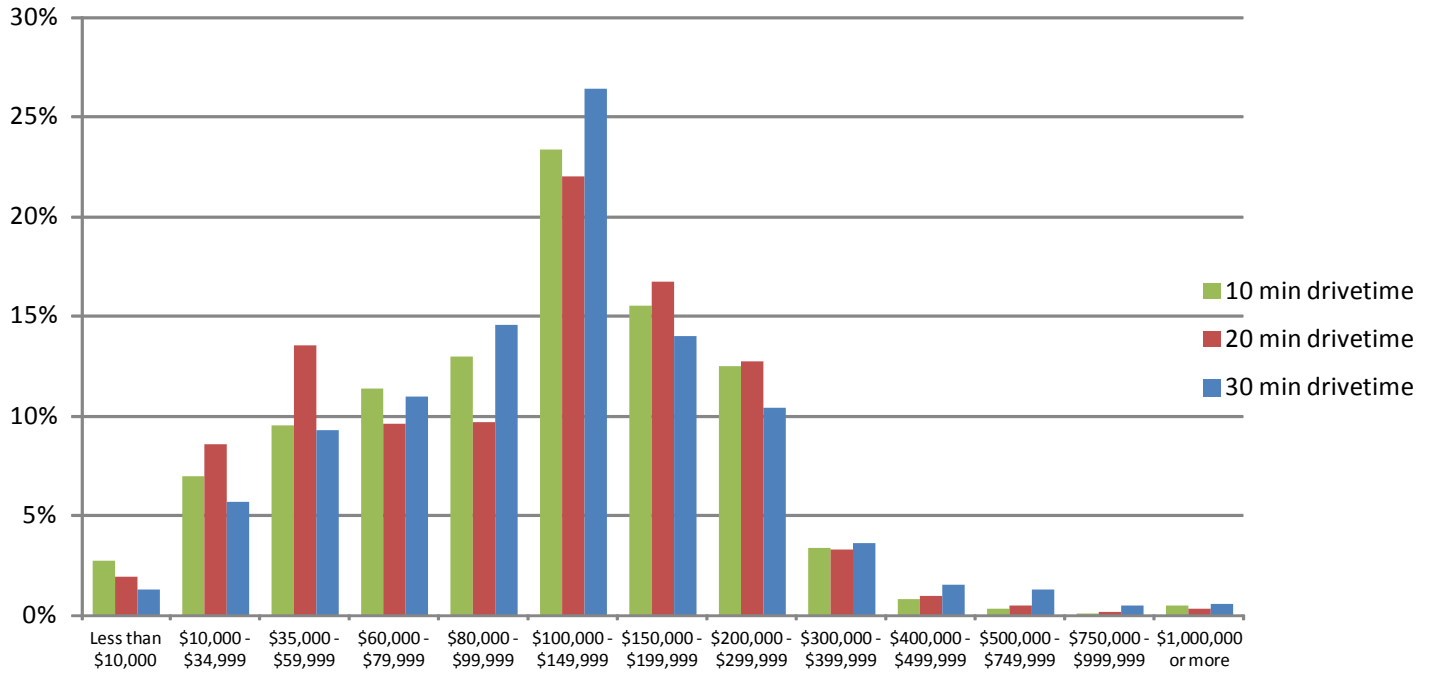


Of the population in the Skiatook drivetimes, 52.70% is engaged in white collar occupations, with 17.80% in professional occupations and another 10.40% in management, business and financial operations. Of the population in the Skiatook drivetimes, 47.30% is engaged in blue collar occupations with 12.10% in construction and maintenance and 14.70% in production and transport.

HOUSING VALUE DISTRIBUTION

Housing Value Distribution / 2013 / Skiatook Drivetimes

Housing Value Distribution 2013



The median value of a home in the drivetimes around Skiatook is \$115,460.00. Of these homes, 75.01% are owner occupied and 20.57% were built since 2000.



## NIELSEN CLARITAS RETAIL MARKET POWER

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The Nielsen Claritas Retail Market Power™ (RMP) database provides an actionable portrait of sales opportunity for optimal site and market analysis, allowing you to maximize your growth strategies by accurately targeting the sales gaps that exist in the marketplace. By using sales potential to depict supply and geography-based estimates of potential annual consumer expenditures to depict demand within a specific market, RMP enables an opportunity gap analysis of the retail environment. The database was developed using the Consumer Expenditure (CEX) surveys conducted by the Bureau of Labor Statistics and the Census of Retail Trade conducted by the US Census. Current-year (CY) supply and demand estimates and five-year (5Y) demand projections are available for all standard census, postal, and marketing geographies.

### Data Sources for Potential Sales:

- Census of Retail Trade (CRT) Annual Survey of Retail Trade
- Claritas Business-Facts
- Census of Employment Wages
- State Sales Tax reports
- Trade Associations
- Demand Side Estimates

### Data Sources for Potential Expenditures:

- Consumer Expenditure Survey (CEX) Global Insights
- Claritas Current Year demographics
- Trade Associations

The Nielsen Claritas Retail Market Power™ (RMP) allows you to compare supply and demand to determine potential sources of revenue growth at any standard or user defined geographic level. Such comparison can be achieved at the retail outlet level or the merchandise line level. An opportunity gap appears when household expenditure levels for a specific geography are higher than the corresponding retail sales estimates. This difference signifies that resident households are meeting the available supply and supplementing their additional demand potential by going outside of their own geography. The opposite is true in the event of an opportunity surplus which occurs when the levels of household expenditures are lower than the retail sales estimates. In this case, local retailers are attracting residents from other areas to their stores.

## RETAIL CATEGORIES

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### Vehicle and Parts Dealers

New and used automobile dealers, motorcycle dealers, recreational vehicle dealers, all terrain vehicle dealers, boat dealers, auto parts stores, auto accessories stores and tire dealers

### Furniture and Home Furnishings Stores

Furniture stores, home furnishing stores, home decorating stores and floor covering stores

### Electronics and Appliance Stores

Household appliance stores, electronics stores, computer and software stores and camera and photographic equipment stores

### Building Materials and Garden Supply Stores

Building material and supply dealers, home improvement centers, paint and wallpaper stores, hardware stores, lumberyards, lawn and garden stores, outdoor power equipment stores, nursery and garden centers

### Food and Beverage Stores

Grocery stores, supermarkets, convenience stores, specialty food stores and beer, wine and liquor stores

### Health and Personal Care Stores

Pharmacies, drug stores, cosmetic dealers, beauty supply stores, perfume stores, optical goods stores, health care stores and personal care stores

### Gasoline Stations

Gasoline stations and gasoline stations with convenience stores

### Clothing and Clothing Accessories Stores

Men's clothing stores, women's clothing stores, children's and infant's clothing stores, family clothing stores, clothing accessories stores, shoe stores, jewelry stores, luggage stores, leather goods stores

### Sporting Goods and Hobby Stores

Sporting goods stores, hobby stores, toy stores, sewing and needlework stores, musical instrument and supplies stores, book stores, newsstands, music stores

### General Merchandise Stores

Department stores and other general merchandise stores

### Miscellaneous Store Retailers

Florists, office supply stores, stationery stores, gift and souvenir stores, used merchandise stores and other miscellaneous retailers

### Foodservice and Drinking Places

Full-service restaurants, limited-service eating places, special foodservices, taverns and bars

## OPPORTUNITY GAP - CITY LIMITS

RETAIL CATEGORY	POTENTIAL SALES	ACTUAL SALES	SURPLUS/LEAKAGE
Motor Vehicle and Parts Dealers	\$15,525,927	\$4,776,353	\$10,749,574
Automotive Dealers	\$10,577,209	\$4,146,031	\$6,431,178
Other Motor Vehicle Dealers	\$3,409,066	\$173,703	\$3,235,363
Automotive Parts and Accessories	\$1,539,652	\$456,619	\$1,083,033
Furniture and Home Furnishings	\$2,098,465	\$640,317	\$1,458,148
Furniture	\$1,104,832	\$591,726	\$513,106
Home Furnishings	\$993,633	\$48,591	\$945,042
Electronics and Appliances	\$2,109,507	\$574,078	\$1,535,429
Appliances, TVs, Electronics	\$1,545,794	\$225,895	\$1,319,899
Household Appliances	\$271,907	\$170	\$271,737
Radio, Television, Electronics	\$1,273,887	\$225,725	\$1,048,162
Computer and Software	\$515,320	\$348,183	\$167,137
Photographic Equipment	\$48,393	\$0	\$48,393
Building Materials and Garden Eqpt	\$10,482,494	\$1,797,804	\$8,684,690
Building Materials	\$9,323,055	\$0	\$9,323,055
Home Centers	\$3,773,403	\$0	\$3,773,403
Paint and Wallpaper	\$151,923	\$0	\$151,923
Hardware	\$960,331	\$0	\$960,331
Other Build Materials	\$4,437,398	\$0	\$4,437,398
Lumberyards	\$1,735,539	\$0	\$1,735,539
Lawn and Garden Supplies	\$1,159,439	\$1,797,804	(\$638,365)
Outdoor Power Equipment	\$245,051	\$233,471	\$11,580
Nursery and Garden Centers	\$914,388	\$1,564,333	(\$649,945)
Food and Beverage Stores	\$15,303,519	\$1,350,368	\$13,953,151
Grocery Stores	\$13,301,742	\$586,695	\$12,715,047
Supermarkets	\$12,579,304	\$19,968	\$12,559,336
Convenience Stores	\$722,438	\$566,727	\$155,711
Specialty Food Stores	\$1,087,415	\$506,971	\$580,444
Beer, Wine and Liquor Stores	\$914,362	\$256,702	\$657,660
Health and Personal Care	\$7,264,226	\$5,456,032	\$1,808,194
Pharmacies and Drug Stores	\$5,808,681	\$5,102,441	\$706,240
Cosmetics and Beauty Supplies	\$517,675	\$0	\$517,675
Optical Goods	\$282,906	\$0	\$282,906
Other Health and Personal Care	\$654,964	\$353,591	\$301,373
Gasoline Stations	\$11,989,865	\$17,995,357	(\$6,005,492)
Gasoline with Convenience Store	\$8,958,881	\$10,942,431	(\$1,983,550)
Other Gasoline Stations	\$3,030,984	\$7,052,926	(\$4,021,942)

## OPPORTUNITY GAP - CITY LIMITS

RETAIL CATEGORY (cont)	POTENTIAL SALES	ACTUAL SALES	SURPLUS/LEAKAGE
Clothing and Clothing Accessories	\$4,985,511	\$159,379	\$4,826,132
Clothing	\$3,799,473	\$13,341	\$3,786,132
Men's Clothing	\$212,979	\$0	\$212,979
Women's Clothing	\$826,057	\$0	\$826,057
Children's Clothing	\$262,591	\$0	\$262,591
Family Clothing	\$2,004,830	\$1,449	\$2,003,381
Clothing Accessories	\$150,552	\$0	\$150,552
Other Clothing	\$342,464	\$11,892	\$330,572
Shoes	\$664,093	\$37,087	\$627,006
Jewelry	\$476,622	\$97,871	\$378,751
Luggage and Leather Goods	\$45,323	\$11,080	\$34,243
Sporting Goods, Hobby, Book Music	\$1,961,659	\$311,666	\$1,649,993
Sporting Goods	\$849,394	\$135,060	\$714,334
Hobby, Toys, Games	\$456,663	\$0	\$456,663
Sew, Needlework, Piece Goods	\$167,849	\$0	\$167,849
Musical Instruments	\$110,359	\$176,606	(\$66,247)
Book Stores	\$267,445	\$0	\$267,445
News Dealers and Newsstand	\$38,151	\$0	\$38,151
Prerecorded Tapes, CDs, Record	\$71,798	\$0	\$71,798
General Merchandise	\$14,886,157	\$72,050,231	(\$57,164,074)
Miscellaneous Retailers	\$3,491,505	\$693,660	\$2,797,845
Florists	\$130,359	\$0	\$130,359
Office Supplies, Stationery, Gifts	\$945,600	\$150,709	\$794,891
Used Merchandise	\$257,101	\$66,757	\$190,344
Other Miscellaneous	\$2,158,445	\$476,194	\$1,682,251
Non-Store Retailers	\$8,615,647	\$94,804	\$8,520,843
Food and Drink	\$11,721,037	\$3,386,836	\$8,334,201
Full Service Restaurants	\$5,395,676	\$1,573,174	\$3,822,502
Limited Service Restaurants	\$4,813,885	\$1,204,375	\$3,609,510
Special Food	\$928,834	\$456,598	\$472,236
Drinking Places	\$582,642	\$152,689	\$429,953
TOTAL LEAKAGE			\$64,968,145
TOTAL SURPLUS			(\$63,819,511)
BALANCE			\$1,148,634

## OPPORTUNITY GAP - 5 MILE RADIUS

RETAIL CATEGORY	POTENTIAL SALES	ACTUAL SALES	SURPLUS/LEAKAGE
Motor Vehicle and Parts Dealers	\$27,044,411	\$8,382,277	\$18,662,134
Automotive Dealers	\$18,543,437	\$7,507,024	\$11,036,413
Other Motor Vehicle Dealers	\$5,844,605	\$214,272	\$5,630,333
Automotive Parts and Accessories	\$2,656,369	\$660,981	\$1,995,388
Furniture and Home Furnishings	\$3,579,081	\$952,622	\$2,626,459
Furniture	\$1,879,744	\$857,988	\$1,021,756
Home Furnishings	\$1,699,337	\$94,634	\$1,604,703
Electronics and Appliances	\$3,639,082	\$719,922	\$2,919,160
Appliances, TVs, Electronics	\$2,664,670	\$314,082	\$2,350,588
Household Appliances	\$469,709	\$383	\$469,326
Radio, Television, Electronics	\$2,194,961	\$313,699	\$1,881,262
Computer and Software	\$890,629	\$405,840	\$484,789
Photographic Equipment	\$83,783	\$0	\$83,783
Building Materials and Garden Eqpt	\$18,147,024	\$7,932,939	\$10,214,085
Building Materials	\$16,137,157	\$5,377,066	\$10,760,091
Home Centers	\$6,512,844	\$5,377,066	\$1,135,778
Paint and Wallpaper	\$264,993	\$0	\$264,993
Hardware	\$1,655,487	\$0	\$1,655,487
Other Build Materials	\$7,703,833	\$0	\$7,703,833
Lumberyards	\$3,002,008	\$0	\$3,002,008
Lawn and Garden Supplies	\$2,009,867	\$2,555,873	(\$546,006)
Outdoor Power Equipment	\$422,676	\$301,362	\$121,314
Nursery and Garden Centers	\$1,587,190	\$2,254,511	(\$667,321)
Food and Beverage Stores	\$26,150,604	\$1,826,131	\$24,324,473
Grocery Stores	\$22,729,065	\$844,238	\$21,884,827
Supermarkets	\$21,504,124	\$44,930	\$21,459,194
Convenience Stores	\$1,224,941	\$799,309	\$425,632
Specialty Food Stores	\$1,859,418	\$506,971	\$1,352,447
Beer, Wine and Liquor Stores	\$1,562,121	\$474,922	\$1,087,199
Health and Personal Care	\$12,443,269	\$6,611,802	\$5,831,467
Pharmacies and Drug Stores	\$9,941,582	\$6,175,628	\$3,765,954
Cosmetics and Beauty Supplies	\$886,134	\$0	\$886,134
Optical Goods	\$494,366	\$0	\$494,366
Other Health and Personal Care	\$1,121,186	\$436,174	\$685,012
Gasoline Stations	\$20,457,511	\$22,462,690	(\$2,005,179)
Gasoline with Convenience Store	\$15,261,223	\$14,002,624	\$1,258,599
Other Gasoline Stations	\$5,196,289	\$8,460,066	(\$3,263,777)

## OPPORTUNITY GAP - 5 MILE RADIUS

RETAIL CATEGORY (cont)	POTENTIAL SALES	ACTUAL SALES	SURPLUS/LEAKAGE
Clothing and Clothing Accessories	\$8,567,977	\$660,273	\$7,907,704
Clothing	\$6,526,746	\$448,523	\$6,078,223
Men's Clothing	\$368,064	\$0	\$368,064
Women's Clothing	\$1,425,098	\$0	\$1,425,098
Children's Clothing	\$441,439	\$0	\$441,439
Family Clothing	\$3,441,693	\$3,259	\$3,438,434
Clothing Accessories	\$260,346	\$409,925	(\$149,579)
Other Clothing	\$590,105	\$35,339	\$554,766
Shoes	\$1,129,663	\$53,775	\$1,075,888
Jewelry	\$833,478	\$141,910	\$691,568
Luggage and Leather Goods	\$78,090	\$16,065	\$62,025
Sporting Goods, Hobby, Book Music	\$3,384,079	\$560,051	\$2,824,028
Sporting Goods	\$1,452,585	\$309,979	\$1,142,606
Hobby, Toys, Games	\$799,280	\$0	\$799,280
Sew, Needlework, Piece Goods	\$286,628	\$0	\$286,628
Musical Instruments	\$190,081	\$250,072	(\$59,991)
Book Stores	\$466,574	\$0	\$466,574
News Dealers and Newsstand	\$65,112	\$0	\$65,112
Prerecorded Tapes, CDs, Record	\$123,820	\$0	\$123,820
General Merchandise	\$25,494,800	\$105,435,089	(\$79,940,289)
Miscellaneous Retailers	\$5,960,210	\$1,524,171	\$4,436,039
Florists	\$227,195	\$0	\$227,195
Office Supplies, Stationery, Gifts	\$1,627,678	\$175,665	\$1,452,013
Used Merchandise	\$442,645	\$77,812	\$364,833
Other Miscellaneous	\$3,662,692	\$1,270,694	\$2,391,998
Non-Store Retailers	\$14,806,107	\$560,012	\$14,246,095
Food and Drink	\$20,053,628	\$4,974,134	\$15,079,494
Full Service Restaurants	\$9,235,004	\$2,259,725	\$6,975,279
Limited Service Restaurants	\$8,235,285	\$1,991,528	\$6,243,757
Special Food	\$1,589,976	\$456,598	\$1,133,378
Drinking Places	\$993,363	\$266,283	\$727,080
TOTAL LEAKAGE			\$109,738,456
TOTAL SURPLUS			(\$82,612,789)
BALANCE			\$27,125,667

## OPPORTUNITY GAP - 10 MILE RADIUS

RETAIL CATEGORY	POTENTIAL SALES	ACTUAL SALES	SURPLUS/LEAKAGE
Motor Vehicle and Parts Dealers	\$110,251,885	\$50,604,857	\$59,647,028
Automotive Dealers	\$76,930,833	\$19,321,965	\$57,608,868
Other Motor Vehicle Dealers	\$22,395,717	\$25,391,089	(\$2,995,372)
Automotive Parts and Accessories	\$10,925,336	\$5,891,803	\$5,033,533
Furniture and Home Furnishings	\$14,856,353	\$5,104,873	\$9,751,480
Furniture	\$7,793,552	\$1,094,037	\$6,699,515
Home Furnishings	\$7,062,801	\$4,010,836	\$3,051,965
Electronics and Appliances	\$15,434,952	\$5,311,256	\$10,123,696
Appliances, TVs, Electronics	\$11,296,055	\$3,086,391	\$8,209,664
Household Appliances	\$1,970,413	\$1,245,264	\$725,149
Radio, Television, Electronics	\$9,325,642	\$1,841,127	\$7,484,515
Computer and Software	\$3,781,833	\$2,224,865	\$1,556,968
Photographic Equipment	\$357,064	\$0	\$357,064
Building Materials and Garden Eqpt	\$75,331,206	\$41,999,230	\$33,331,976
Building Materials	\$67,114,244	\$38,647,555	\$28,466,689
Home Centers	\$27,090,787	\$24,247,840	\$2,842,947
Paint and Wallpaper	\$1,096,277	\$0	\$1,096,277
Hardware	\$6,864,150	\$13,223,077	(\$6,358,927)
Other Build Materials	\$32,063,031	\$1,176,637	\$30,886,394
Lumberyards	\$12,385,796	\$460,065	\$11,925,731
Lawn and Garden Supplies	\$8,216,962	\$3,351,675	\$4,865,287
Outdoor Power Equipment	\$1,653,559	\$544,264	\$1,109,295
Nursery and Garden Centers	\$6,563,403	\$2,807,411	\$3,755,992
Food and Beverage Stores	\$106,505,944	\$67,295,541	\$39,210,403
Grocery Stores	\$92,517,214	\$62,700,216	\$29,816,998
Supermarkets	\$87,701,658	\$57,485,218	\$30,216,440
Convenience Stores	\$4,815,556	\$5,214,998	(\$399,442)
Specialty Food Stores	\$7,602,713	\$1,799,450	\$5,803,263
Beer, Wine and Liquor Stores	\$6,386,016	\$2,795,874	\$3,590,142
Health and Personal Care	\$51,121,101	\$23,971,209	\$27,149,892
Pharmacies and Drug Stores	\$40,788,376	\$21,048,579	\$19,739,797
Cosmetics and Beauty Supplies	\$3,642,440	\$2,061,492	\$1,580,948
Optical Goods	\$2,083,666	\$174,065	\$1,909,601
Other Health and Personal Care	\$4,606,620	\$687,073	\$3,919,547
Gasoline Stations	\$82,325,617	\$74,509,243	\$7,816,374
Gasoline with Convenience Store	\$61,023,580	\$54,956,940	\$6,066,640
Other Gasoline Stations	\$21,302,036	\$19,552,302	\$1,749,734

## OPPORTUNITY GAP - 10 MILE RADIUS

RETAIL CATEGORY (cont)	POTENTIAL SALES	ACTUAL SALES	SURPLUS/LEAKAGE
Clothing and Clothing Accessories	\$36,022,947	\$10,225,834	\$25,797,113
Clothing	\$27,428,651	\$6,746,098	\$20,682,553
Men's Clothing	\$1,533,419	\$0	\$1,533,419
Women's Clothing	\$6,009,202	\$936,467	\$5,072,735
Children's Clothing	\$1,859,238	\$63,029	\$1,796,209
Family Clothing	\$14,450,453	\$4,092,434	\$10,358,019
Clothing Accessories	\$1,098,418	\$1,456,134	(\$357,716)
Other Clothing	\$2,477,921	\$198,034	\$2,279,887
Shoes	\$4,724,623	\$3,111,204	\$1,613,419
Jewelry	\$3,544,259	\$352,467	\$3,191,792
Luggage and Leather Goods	\$325,413	\$16,065	\$309,348
Sporting Goods, Hobby, Book Music	\$14,217,418	\$3,248,445	\$10,968,973
Sporting Goods	\$6,093,111	\$1,240,625	\$4,852,486
Hobby, Toys, Games	\$3,366,882	\$1,000,404	\$2,366,478
Sew, Needlework, Piece Goods	\$1,192,151	\$389,863	\$802,288
Musical Instruments	\$830,611	\$617,553	\$213,058
Book Stores	\$1,943,761	\$0	\$1,943,761
News Dealers and Newsstand	\$257,935	\$0	\$257,935
Prerecorded Tapes, CDs, Record	\$532,967	\$0	\$532,967
General Merchandise	\$105,101,539	\$120,923,137	(\$15,821,598)
Miscellaneous Retailers	\$23,612,278	\$9,029,109	\$14,583,169
Florists	\$946,183	\$799,341	\$146,842
Office Supplies, Stationery, Gifts	\$6,759,017	\$3,395,244	\$3,363,773
Used Merchandise	\$1,857,011	\$989,661	\$867,350
Other Miscellaneous	\$14,050,067	\$3,844,863	\$10,205,204
Non-Store Retailers	\$61,395,687	\$4,577,551	\$56,818,136
Food and Drink	\$82,304,151	\$18,201,861	\$64,102,290
Full Service Restaurants	\$37,969,344	\$10,171,640	\$27,797,704
Limited Service Restaurants	\$33,800,294	\$6,288,944	\$27,511,350
Special Food	\$6,534,277	\$881,459	\$5,652,818
Drinking Places	\$4,000,236	\$859,818	\$3,140,418
TOTAL LEAKAGE			\$368,654,833
TOTAL SURPLUS			(\$25,175,897)
BALANCE			\$343,478,936



## OPPORTUNITY GAP - 15 MILE RADIUS

RETAIL CATEGORY	POTENTIAL SALES	ACTUAL SALES	SURPLUS/LEAKAGE
Motor Vehicle and Parts Dealers	\$365,667,435	\$249,706,716	\$115,960,719
Automotive Dealers	\$270,218,915	\$150,634,597	\$119,584,318
Other Motor Vehicle Dealers	\$63,730,948	\$68,363,125	(\$4,632,177)
Automotive Parts and Accessories	\$31,717,571	\$30,708,994	\$1,008,577
Furniture and Home Furnishings	\$45,051,101	\$34,517,570	\$10,533,531
Furniture	\$23,723,502	\$14,566,093	\$9,157,409
Home Furnishings	\$21,327,599	\$19,951,477	\$1,376,122
Electronics and Appliances	\$45,254,570	\$57,704,633	(\$12,450,063)
Appliances, TVs, Electronics	\$33,182,976	\$40,351,620	(\$7,168,644)
Household Appliances	\$5,758,306	\$4,237,504	\$1,520,802
Radio, Television, Electronics	\$27,424,671	\$36,114,116	(\$8,689,445)
Computer and Software	\$11,039,082	\$17,353,012	(\$6,313,930)
Photographic Equipment	\$1,032,511	\$0	\$1,032,511
Building Materials and Garden Eqpt	\$219,176,427	\$275,225,483	(\$56,049,056)
Building Materials	\$195,606,975	\$267,913,427	(\$72,306,452)
Home Centers	\$79,620,750	\$131,786,069	(\$52,165,319)
Paint and Wallpaper	\$3,137,578	\$2,337,444	\$800,134
Hardware	\$20,261,643	\$19,609,542	\$652,101
Other Build Materials	\$92,587,004	\$114,180,372	(\$21,593,368)
Lumberyards	\$35,774,544	\$44,644,516	(\$8,869,972)
Lawn and Garden Supplies	\$23,569,452	\$7,312,057	\$16,257,395
Outdoor Power Equipment	\$4,606,001	\$1,976,960	\$2,629,041
Nursery and Garden Centers	\$18,963,451	\$5,335,097	\$13,628,354
Food and Beverage Stores	\$320,351,019	\$209,765,114	\$110,585,905
Grocery Stores	\$278,265,862	\$186,269,325	\$91,996,537
Supermarkets	\$263,898,540	\$176,124,734	\$87,773,806
Convenience Stores	\$14,367,321	\$10,144,591	\$4,222,730
Specialty Food Stores	\$22,902,674	\$8,824,527	\$14,078,147
Beer, Wine and Liquor Stores	\$19,182,483	\$14,671,263	\$4,511,220
Health and Personal Care	\$155,162,702	\$93,640,605	\$61,522,097
Pharmacies and Drug Stores	\$123,867,839	\$85,836,764	\$38,031,075
Cosmetics and Beauty Supplies	\$11,088,631	\$4,545,976	\$6,542,655
Optical Goods	\$6,200,739	\$630,698	\$5,570,041
Other Health and Personal Care	\$14,005,494	\$2,627,167	\$11,378,327
Gasoline Stations	\$242,854,485	\$376,417,624	(\$133,563,139)
Gasoline with Convenience Store	\$180,190,368	\$314,150,081	(\$133,959,713)
Other Gasoline Stations	\$62,664,117	\$62,267,544	\$396,573

## OPPORTUNITY GAP - 15 MILE RADIUS

RETAIL CATEGORY (cont)	POTENTIAL SALES	ACTUAL SALES	SURPLUS/LEAKAGE
Clothing and Clothing Accessories	\$107,956,722	\$53,837,433	\$54,119,289
Clothing	\$82,456,440	\$38,732,810	\$43,723,630
Men's Clothing	\$4,616,282	\$3,455,807	\$1,160,475
Women's Clothing	\$18,036,039	\$4,453,492	\$13,582,547
Children's Clothing	\$5,606,989	\$1,274,338	\$4,332,651
Family Clothing	\$43,470,298	\$24,000,475	\$19,469,823
Clothing Accessories	\$3,270,255	\$3,046,409	\$223,846
Other Clothing	\$7,456,578	\$2,502,289	\$4,954,289
Shoes	\$14,535,608	\$12,784,778	\$1,750,830
Jewelry	\$10,000,951	\$1,405,262	\$8,595,689
Luggage and Leather Goods	\$963,722	\$914,583	\$49,139
Sporting Goods, Hobby, Book Music	\$42,293,568	\$20,514,692	\$21,778,876
Sporting Goods	\$18,377,128	\$7,652,409	\$10,724,719
Hobby, Toys, Games	\$9,837,095	\$7,702,415	\$2,134,680
Sew, Needlework, Piece Goods	\$3,604,743	\$1,467,483	\$2,137,260
Musical Instruments	\$2,419,903	\$1,772,467	\$647,436
Book Stores	\$5,730,556	\$1,192,810	\$4,537,746
News Dealers and Newsstand	\$760,920	\$0	\$760,920
Prerecorded Tapes, CDs, Record	\$1,563,222	\$727,107	\$836,115
General Merchandise	\$315,279,841	\$213,617,676	\$101,662,165
Miscellaneous Retailers	\$68,935,409	\$44,072,200	\$24,863,209
Florists	\$2,713,610	\$2,499,146	\$214,464
Office Supplies, Stationery, Gifts	\$19,811,545	\$11,244,623	\$8,566,922
Used Merchandise	\$5,528,697	\$4,301,733	\$1,226,964
Other Miscellaneous	\$40,881,557	\$26,026,699	\$14,854,858
Non-Store Retailers	\$183,749,614	\$33,916,515	\$149,833,099
Food and Drink	\$242,564,195	\$163,342,905	\$79,221,290
Full Service Restaurants	\$111,830,409	\$52,009,136	\$59,821,273
Limited Service Restaurants	\$99,591,820	\$85,235,678	\$14,356,142
Special Food	\$19,255,197	\$21,360,412	(\$2,105,215)
Drinking Places	\$11,886,768	\$4,737,679	\$7,149,089
<b>TOTAL LEAKAGE</b>			<b>\$757,080,512</b>
<b>TOTAL SURPLUS</b>			<b>(\$229,062,593)</b>
<b>BALANCE</b>			<b>\$528,017,919</b>

## OPPORTUNITY GAP - 10 MINUTE DRIVETIME

RETAIL CATEGORY	POTENTIAL SALES	ACTUAL SALES	SURPLUS/LEAKAGE
Motor Vehicle and Parts Dealers	\$20,027,480	\$7,655,259	\$12,372,221
Automotive Dealers	\$13,719,536	\$6,901,829	\$6,817,707
Other Motor Vehicle Dealers	\$4,311,375	\$184,718	\$4,126,657
Automotive Parts and Accessories	\$1,996,569	\$568,712	\$1,427,857
Furniture and Home Furnishings	\$2,725,243	\$727,504	\$1,997,739
Furniture	\$1,431,694	\$627,824	\$803,870
Home Furnishings	\$1,293,549	\$99,680	\$1,193,869
Electronics and Appliances	\$2,735,029	\$644,287	\$2,090,742
Appliances, TVs, Electronics	\$2,003,817	\$239,873	\$1,763,944
Household Appliances	\$352,716	\$227	\$352,489
Radio, Television, Electronics	\$1,651,101	\$239,646	\$1,411,455
Computer and Software	\$668,561	\$404,414	\$264,147
Photographic Equipment	\$62,651	\$0	\$62,651
Building Materials and Garden Eqpt	\$13,628,221	\$2,698,849	\$10,929,372
Building Materials	\$12,127,441	\$722,610	\$11,404,831
Home Centers	\$4,905,992	\$722,610	\$4,183,382
Paint and Wallpaper	\$197,422	\$0	\$197,422
Hardware	\$1,249,246	\$0	\$1,249,246
Other Build Materials	\$5,774,781	\$0	\$5,774,781
Lumberyards	\$2,253,565	\$0	\$2,253,565
Lawn and Garden Supplies	\$1,500,780	\$1,976,239	(\$475,459)
Outdoor Power Equipment	\$311,893	\$311,622	\$271
Nursery and Garden Centers	\$1,188,887	\$1,664,618	(\$475,731)
Food and Beverage Stores	\$19,935,501	\$1,642,760	\$18,292,741
Grocery Stores	\$17,332,960	\$708,687	\$16,624,273
Supermarkets	\$16,391,478	\$26,625	\$16,364,853
Convenience Stores	\$941,482	\$682,062	\$259,420
Specialty Food Stores	\$1,416,688	\$506,971	\$909,717
Beer, Wine and Liquor Stores	\$1,185,853	\$427,101	\$758,752
Health and Personal Care	\$9,495,350	\$6,221,826	\$3,273,524
Pharmacies and Drug Stores	\$7,593,495	\$5,845,814	\$1,747,681
Cosmetics and Beauty Supplies	\$676,993	\$0	\$676,993
Optical Goods	\$368,629	\$0	\$368,629
Other Health and Personal Care	\$856,233	\$376,012	\$480,221
Gasoline Stations	\$15,578,460	\$20,624,179	(\$5,045,719)
Gasoline with Convenience Store	\$11,646,334	\$13,134,641	(\$1,488,307)
Other Gasoline Stations	\$3,932,125	\$7,489,538	(\$3,557,413)

## OPPORTUNITY GAP - 10 MINUTE DRIVETIME

RETAIL CATEGORY (cont)	POTENTIAL SALES	ACTUAL SALES	SURPLUS/LEAKAGE
Clothing and Clothing Accessories	\$6,466,108	\$678,043	\$5,788,065
Clothing	\$4,932,950	\$523,097	\$4,409,853
Men's Clothing	\$277,671	\$0	\$277,671
Women's Clothing	\$1,073,936	\$0	\$1,073,936
Children's Clothing	\$337,308	\$0	\$337,308
Family Clothing	\$2,602,912	\$1,932	\$2,600,980
Clothing Accessories	\$195,513	\$514,658	(\$319,145)
Other Clothing	\$445,609	\$6,507	\$439,102
Shoes	\$861,565	\$39,349	\$822,216
Jewelry	\$612,767	\$103,841	\$508,926
Luggage and Leather Goods	\$58,826	\$11,755	\$47,071
Sporting Goods, Hobby, Book Music	\$2,552,205	\$552,692	\$1,999,513
Sporting Goods	\$1,101,642	\$286,375	\$815,267
Hobby, Toys, Games	\$600,528	\$0	\$600,528
Sew, Needlework, Piece Goods	\$217,183	\$0	\$217,183
Musical Instruments	\$142,731	\$266,317	(\$123,586)
Book Stores	\$347,374	\$0	\$347,374
News Dealers and Newsstand	\$49,731	\$0	\$49,731
Prerecorded Tapes, CDs, Record	\$93,015	\$0	\$93,015
General Merchandise	\$19,374,832	\$78,226,035	(\$58,851,203)
Miscellaneous Retailers	\$4,546,476	\$1,095,293	\$3,451,183
Florists	\$169,494	\$0	\$169,494
Office Supplies, Stationery, Gifts	\$1,227,014	\$175,048	\$1,051,966
Used Merchandise	\$333,406	\$77,539	\$255,867
Other Miscellaneous	\$2,816,562	\$842,707	\$1,973,855
Non-Store Retailers	\$11,215,140	\$130,468	\$11,084,672
Food and Drink	\$15,220,479	\$4,339,815	\$10,880,664
Full Service Restaurants	\$7,004,465	\$1,969,187	\$5,035,278
Limited Service Restaurants	\$6,253,236	\$1,682,940	\$4,570,296
Special Food	\$1,206,436	\$456,598	\$749,838
Drinking Places	\$756,342	\$231,090	\$525,252
<b>TOTAL LEAKAGE</b>			\$82,636,165
<b>TOTAL SURPLUS</b>			(\$64,372,653)
<b>BALANCE</b>			\$18,263,512

## OPPORTUNITY GAP - 20 MINUTE DRIVETIME

RETAIL CATEGORY	POTENTIAL SALES	ACTUAL SALES	SURPLUS/LEAKAGE
Motor Vehicle and Parts Dealers	\$80,020,878	\$50,827,113	\$29,193,765
Automotive Dealers	\$55,360,218	\$24,129,013	\$31,231,205
Other Motor Vehicle Dealers	\$16,713,070	\$23,346,976	(\$6,633,906)
Automotive Parts and Accessories	\$7,947,590	\$3,351,124	\$4,596,466
Furniture and Home Furnishings	\$10,857,799	\$3,695,644	\$7,162,155
Furniture	\$5,674,607	\$1,161,480	\$4,513,127
Home Furnishings	\$5,183,192	\$2,534,164	\$2,649,028
Electronics and Appliances	\$11,110,474	\$4,633,294	\$6,477,180
Appliances, TVs, Electronics	\$8,135,640	\$2,506,000	\$5,629,640
Household Appliances	\$1,424,458	\$1,243,249	\$181,209
Radio, Television, Electronics	\$6,711,182	\$1,262,751	\$5,448,431
Computer and Software	\$2,720,402	\$2,127,294	\$593,108
Photographic Equipment	\$254,432	\$0	\$254,432
Building Materials and Garden Eqpt	\$54,913,692	\$31,919,959	\$22,993,733
Building Materials	\$48,902,927	\$28,504,465	\$20,398,462
Home Centers	\$19,748,001	\$18,043,990	\$1,704,011
Paint and Wallpaper	\$795,526	\$0	\$795,526
Hardware	\$5,024,560	\$8,230,976	(\$3,206,416)
Other Build Materials	\$23,334,840	\$2,229,498	\$21,105,342
Lumberyards	\$9,005,190	\$871,733	\$8,133,457
Lawn and Garden Supplies	\$6,010,766	\$3,415,494	\$2,595,272
Outdoor Power Equipment	\$1,223,481	\$544,264	\$679,217
Nursery and Garden Centers	\$4,787,285	\$2,871,230	\$1,916,055
Food and Beverage Stores	\$78,787,659	\$45,238,518	\$33,549,141
Grocery Stores	\$68,492,677	\$42,692,168	\$25,800,509
Supermarkets	\$64,892,338	\$39,761,881	\$25,130,457
Convenience Stores	\$3,600,339	\$2,930,288	\$670,051
Specialty Food Stores	\$5,618,158	\$1,190,803	\$4,427,355
Beer, Wine and Liquor Stores	\$4,676,824	\$1,355,547	\$3,321,277
Health and Personal Care	\$38,134,741	\$16,790,050	\$21,344,691
Pharmacies and Drug Stores	\$30,461,381	\$16,211,505	\$14,249,876
Cosmetics and Beauty Supplies	\$2,722,947	\$135,408	\$2,587,539
Optical Goods	\$1,511,200	\$0	\$1,511,200
Other Health and Personal Care	\$3,439,213	\$443,137	\$2,996,076
Gasoline Stations	\$60,945,162	\$67,355,826	(\$6,410,664)
Gasoline with Convenience Store	\$45,288,673	\$50,934,316	(\$5,645,643)
Other Gasoline Stations	\$15,656,488	\$16,421,510	(\$765,022)

## OPPORTUNITY GAP - 20 MINUTE DRIVETIME

RETAIL CATEGORY (cont)	POTENTIAL SALES	ACTUAL SALES	SURPLUS/LEAKAGE
Clothing and Clothing Accessories	\$26,107,353	\$4,798,460	\$21,308,893
Clothing	\$19,917,952	\$3,844,581	\$16,073,371
Men's Clothing	\$1,121,030	\$0	\$1,121,030
Women's Clothing	\$4,358,054	\$783,567	\$3,574,487
Children's Clothing	\$1,339,369	\$28,898	\$1,310,471
Family Clothing	\$10,501,066	\$1,268,023	\$9,233,043
Clothing Accessories	\$793,923	\$1,547,750	(\$753,827)
Other Clothing	\$1,804,511	\$216,344	\$1,588,167
Shoes	\$3,453,554	\$585,347	\$2,868,207
Jewelry	\$2,499,552	\$352,467	\$2,147,085
Luggage and Leather Goods	\$236,295	\$16,065	\$220,230
Sporting Goods, Hobby, Book Music	\$10,334,778	\$1,603,770	\$8,731,008
Sporting Goods	\$4,436,213	\$804,942	\$3,631,271
Hobby, Toys, Games	\$2,496,015	\$181,275	\$2,314,740
Sew, Needlework, Piece Goods	\$870,344	\$0	\$870,344
Musical Instruments	\$592,706	\$617,553	(\$24,847)
Book Stores	\$1,366,764	\$0	\$1,366,764
News Dealers and Newsstand	\$191,010	\$0	\$191,010
Prerecorded Tapes, CDs, Record	\$381,725	\$0	\$381,725
General Merchandise	\$77,293,578	\$112,817,698	(\$35,524,120)
Miscellaneous Retailers	\$17,508,693	\$4,414,857	\$13,093,836
Florists	\$686,396	\$740,639	(\$54,243)
Office Supplies, Stationery, Gifts	\$4,903,248	\$270,219	\$4,633,029
Used Merchandise	\$1,339,402	\$620,809	\$718,593
Other Miscellaneous	\$10,579,647	\$2,783,190	\$7,796,457
Non-Store Retailers	\$45,001,656	\$4,164,119	\$40,837,537
Food and Drink	\$59,926,294	\$11,761,756	\$48,164,538
Full Service Restaurants	\$27,605,855	\$5,739,607	\$21,866,248
Limited Service Restaurants	\$24,622,666	\$4,176,869	\$20,445,797
Special Food	\$4,758,465	\$1,052,975	\$3,705,490
Drinking Places	\$2,939,308	\$792,304	\$2,147,004
TOTAL LEAKAGE			\$262,751,045
TOTAL SURPLUS			(\$51,829,349)
BALANCE			\$210,921,696

## OPPORTUNITY GAP - 30 MINUTE DRIVETIME

RETAIL CATEGORY	POTENTIAL SALES	ACTUAL SALES	SURPLUS/LEAKAGE
Motor Vehicle and Parts Dealers	\$564,353,383	\$543,231,078	\$21,122,305
Automotive Dealers	\$432,079,843	\$397,801,160	\$34,278,683
Other Motor Vehicle Dealers	\$86,716,377	\$85,562,988	\$1,153,389
Automotive Parts and Accessories	\$45,557,162	\$59,866,930	(\$14,309,768)
Furniture and Home Furnishings	\$65,749,237	\$121,096,172	(\$55,346,935)
Furniture	\$34,799,355	\$68,578,782	(\$33,779,427)
Home Furnishings	\$30,949,882	\$52,517,389	(\$21,567,507)
Electronics and Appliances	\$65,063,785	\$86,632,325	(\$21,568,540)
Appliances, TVs, Electronics	\$47,800,241	\$57,457,903	(\$9,657,662)
Household Appliances	\$8,211,936	\$6,815,943	\$1,395,993
Radio, Television, Electronics	\$39,588,305	\$50,641,960	(\$11,053,655)
Computer and Software	\$15,801,597	\$29,174,422	(\$13,372,825)
Photographic Equipment	\$1,461,948	\$0	\$1,461,948
Building Materials and Garden Eqpt	\$310,845,032	\$445,993,737	(\$135,148,705)
Building Materials	\$277,948,591	\$430,642,781	(\$152,694,190)
Home Centers	\$113,612,368	\$148,087,804	(\$34,475,436)
Paint and Wallpaper	\$4,424,243	\$3,259,755	\$1,164,488
Hardware	\$28,774,688	\$34,640,959	(\$5,866,271)
Other Build Materials	\$131,137,293	\$244,654,263	(\$113,516,970)
Lumberyards	\$51,015,375	\$95,659,816	(\$44,644,441)
Lawn and Garden Supplies	\$32,896,441	\$15,350,956	\$17,545,485
Outdoor Power Equipment	\$6,225,340	\$7,244,187	(\$1,018,847)
Nursery and Garden Centers	\$26,671,101	\$8,106,769	\$18,564,332
Food and Beverage Stores	\$449,596,007	\$305,261,867	\$144,334,140
Grocery Stores	\$389,691,206	\$270,652,838	\$119,038,368
Supermarkets	\$369,262,956	\$256,559,307	\$112,703,649
Convenience Stores	\$20,428,250	\$14,093,531	\$6,334,719
Specialty Food Stores	\$31,914,120	\$13,807,052	\$18,107,068
Beer, Wine and Liquor Stores	\$27,990,681	\$20,801,977	\$7,188,704
Health and Personal Care	\$219,253,479	\$193,701,702	\$25,551,777
Pharmacies and Drug Stores	\$175,119,806	\$161,742,737	\$13,377,069
Cosmetics and Beauty Supplies	\$15,675,092	\$9,710,406	\$5,964,686
Optical Goods	\$8,693,185	\$4,795,006	\$3,898,179
Other Health and Personal Care	\$19,765,396	\$17,453,553	\$2,311,843
Gasoline Stations	\$345,801,100	\$581,777,922	(\$235,976,822)
Gasoline with Convenience Store	\$256,708,340	\$475,117,167	(\$218,408,827)
Other Gasoline Stations	\$89,092,760	\$106,660,755	(\$17,567,995)

## OPPORTUNITY GAP - 30 MINUTE DRIVETIME

RETAIL CATEGORY (cont)	POTENTIAL SALES	ACTUAL SALES	SURPLUS/LEAKAGE
Clothing and Clothing Accessories	\$151,209,806	\$144,023,345	\$7,186,461
Clothing	\$115,168,013	\$108,534,337	\$6,633,676
Men's Clothing	\$6,576,993	\$5,921,587	\$655,406
Women's Clothing	\$25,191,881	\$10,324,035	\$14,867,846
Children's Clothing	\$7,601,792	\$2,423,489	\$5,178,303
Family Clothing	\$60,757,725	\$74,386,720	(\$13,628,995)
Clothing Accessories	\$4,591,275	\$6,188,326	(\$1,597,051)
Other Clothing	\$10,448,347	\$9,290,180	\$1,158,167
Shoes	\$20,310,718	\$21,180,664	(\$869,946)
Jewelry	\$14,364,629	\$11,147,464	\$3,217,165
Luggage and Leather Goods	\$1,366,447	\$3,160,880	(\$1,794,433)
Sporting Goods, Hobby, Book Music	\$61,085,628	\$113,912,081	(\$52,826,453)
Sporting Goods	\$26,198,291	\$69,772,062	(\$43,573,771)
Hobby, Toys, Games	\$13,642,724	\$11,308,958	\$2,333,766
Sew, Needlework, Piece Goods	\$5,219,088	\$6,587,234	(\$1,368,146)
Musical Instruments	\$3,621,004	\$11,369,091	(\$7,748,087)
Book Stores	\$8,991,172	\$12,424,525	(\$3,433,353)
News Dealers and Newsstand	\$1,099,858	\$0	\$1,099,858
Prerecorded Tapes, CDs, Record	\$2,313,491	\$2,450,211	(\$136,720)
General Merchandise	\$442,914,112	\$237,470,420	\$205,443,692
Miscellaneous Retailers	\$98,567,147	\$88,762,359	\$9,804,788
Florists	\$3,822,820	\$6,804,498	(\$2,981,678)
Office Supplies, Stationery, Gifts	\$28,378,325	\$32,106,153	(\$3,727,828)
Used Merchandise	\$7,923,496	\$11,756,260	(\$3,832,764)
Other Miscellaneous	\$58,442,506	\$38,095,448	\$20,347,058
Non-Store Retailers	\$261,781,283	\$61,110,352	\$200,670,931
Food and Drink	\$348,688,938	\$255,262,815	\$93,426,123
Full Service Restaurants	\$161,102,228	\$96,100,952	\$65,001,276
Limited Service Restaurants	\$142,672,016	\$124,823,092	\$17,848,924
Special Food	\$27,578,807	\$24,307,309	\$3,271,498
Drinking Places	\$17,335,888	\$10,031,462	\$7,304,426
<b>TOTAL LEAKAGE</b>			<b>\$755,848,963</b>
<b>TOTAL SURPLUS</b>			<b>(\$549,176,196)</b>
<b>BALANCE</b>			<b>\$206,672,767</b>



## ABOUT US

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Retail Attractions is an economic development consulting firm specializing in market research, creating workable incentive packages and retail recruiting. Our firm believes healthy economic development is a process. Retail Attractions partners with our clients in a coordinated and strategic course of action resulting in extraordinary results. Retail Attractions believes smart, successful retail development is a vital part of a community's economic development program. We leverage our national network of relationships and our proven expertise to bring retailers, developers, landowners and communities together to grow new retail business... one relationship at a time. We partner with our client cities to achieve their community goals through retail development. Far beyond concentric rings, drive times or just another bound report, we develop actionable information and make sure the right people have access to it. In short, we make a difference for your community.

The truth is that anyone or any competent firm can pull demographics for a location based on a radius or a drive time. What makes us different is our custom approach to developing a community's trade area. We evaluate the existing retail options nearby, physical barriers to traffic, natural existing shopping patterns, and the potential draw of new shopping opportunities to develop a custom trade area for each community we serve. Your trade area is prepared by seasoned retail recruitment professionals based on criteria we know is important to the audience who will be receiving the finished marketing materials. We integrate demographic data with data we develop from other sources to create a complete picture of a community... one that will resonate with developers, brokers and retailers. We work with a community to prepare materials and get them in the hands of interested parties rather than merely deliver data that then the community has to send out on its own. We also recognize that "one size DOESN'T fit all" when it comes to trade areas. Some sites may be perfect for a grocery store, with a more localized trade area, while others may support a more regional draw. If your community has unique opportunities that require more than one trade area, we deliver what you need rather than forcing your community into our "standard offering."

Retail Attractions sends our custom marketing material, developed for each city based on the unique characteristics and demographic indicators for that city, to our network of developers, brokers and retailers. In addition, we contact retailers through our accurate, proprietary database to make sure they are aware of opportunities in your city that match their specs.

We have an extensive knowledge of various types of incentives, and their practical application, and the experience to work with city staff to develop a framework for evaluating opportunities and providing creative incentives that result in win-win scenarios for both the public and private sector. Beyond merely a list of incentive possibilities, Retail Attractions serves as an ongoing advisor to city staff, helping to craft incentives that make sense for the city, meet developer's needs and truly encourage new business development.

Retail Attractions understands municipal government and the interplay of political, financial, and regulatory environments. We also understand how development works and what site selectors, developers and retail tenants need to see, hear, and feel from a potential location to move forward. Retail Attractions features a team of research and marketing professionals who assist retail recruiters in developing the necessary data and marketing materials to prove the case for investment in your community. Since beginning Retail Attractions, we have helped our clients launch millions of square feet of retail and reap the associated benefits of additional city revenues, plus new goods and services for citizens, and increasing the quality of life in the community.

## OUR STAFF

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### **RICKEY HAYES, PRINCIPAL**

During his six years as Economic Development Director for the City of Owasso, Rickey Hayes facilitated new commercial construction totaling more than 4.2 million square feet with more than a quarter of a billion dollars in total value, resulting in a city sales tax base more than double what it had been. Since beginning Retail Attractions, Rickey has helped cities launch millions of square feet of additional retail space and reap the associated benefits in additional revenues, goods and services for their citizens. Rickey has developed an extensive personal network of relationships in the areas of government, retail, land development, real estate and site selection, leasing and tenancing, engineering, creative financing for development projects, and architecture and planning. Rickey holds a Bachelors Degree in Criminal Justice and a Masters Degree in Counseling from Great Plains Baptist College. Rickey is a member of International Council of Shopping Centers (ICSC). Rickey and his wife, Wendy, have four children, and one grandchild.

### **BETH NICHOLS, PROJECT MANAGEMENT**

Beth has a Bachelor of Science in Electrical Engineering from Purdue University. She has been with Retail Attractions since inception and manages marketing and recruitment projects at Retail Attractions. Beth is a member of the International Council of Shopping Centers(ICSC). Beth lives with her husband and two children in Skiatook, Oklahoma.

### **ASHLEY TUCKER, ECONOMIST / MARKET RESEARCH**

Ashley has a Bachelor of Science in Economics from Oklahoma State University and a Master of Science in Economics from Oklahoma State University. While in graduate school, her research primarily focused on property values and land values. Ashley has extensive training in Econometrics, Forecasting, and Project Valuation and puts these skills to use as an analyst. She lives with her husband in Owasso, Oklahoma.

### **ROBERT NICHOLS, INFORMATION TECHNOLOGY**

Rob has a Bachelor of Science in Electrical Engineering from Oklahoma State University. He has been with Retail Attractions since inception and manages the website, data storage and access for Retail Attractions. Rob lives with his wife and two children in Skiatook, Oklahoma.

### **PAT FRY, RETAIL RECRUITMENT / PROPERTY MARKETING**

### **MICAH HAYES, RESEARCH / CITY DATA**

## OUR METHODOLOGY

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### Our Approach

Just as every city has distinctive characteristics, every consulting project is unique. Retail Attractions employs proven strategies to achieve economic development and growth in your community. We offer three tiers of contract service in addition to project-based and short-term engagements, allowing us to tailor our services to each client community's individual needs. Unlike "cookie-cutter" approaches to retail development that return little more than a bound document, partnering with Retail Attractions means you gain an experienced, dedicated staff who will work diligently on your behalf to grow your city. In addition to our tiered services under contract, additional services such as municipal web site development (for the city overall or specifically for economic development), experienced city and economic development PR efforts, and public meetings/input process management are available as well. These types of services may either be included in the contract for an additional cost or may be utilized on a project / as-needed basis by a client city for an additional estimated cost.

### Market Assessment

Retail Attractions uses data from a variety of sources to accurately portray the trade area, retail potential and opportunities within a market. Sources used in this report include Nielsen-Claritas, Applied Geographic Solutions (AGS), the City, various state agencies, US Census Bureau, US Economic Survey and US Bureau of Labor information. Retail Attractions combines physical observation, data-driven research and information, retail site selection methodologies and competitive analysis with personal experience and a reputation for finding the right sites for the right retail to create our market assessment reports.

### Retail Recruitment

Our relationships with our clients do not end when we deliver our market assessment report. We promote and actively recruit for our clients throughout the term of their contracts through mail, email, web, phone and personal contacts in our comprehensive nationwide contact database. Our diligent pursuit of development for your community assures your community will be on the radar of appropriate national retailers.

### The Benefits

Employing Retail Attractions to fulfill the city's need for an economic development professional allows the city to conserve resources that would otherwise be spent for no direct gain including insurance, employment taxes and other benefits. The city can reap the benefit of utilizing an experienced, successful economic development professional without incurring the expense of a full-time exempt employee. Retail Attractions is intimately familiar with development dynamics and can bring our experience, network and concentrated approach to bear immediately on behalf of the city. No valuable time is lost through a "learning the process" or "learning the area" acclimation period. Commercial development often feels painfully slow when observing the process from the outside. From initial interest in a site to doors open for business is often an 18- to 24-month process. Retail Attractions will be with you every step of the way to help your community reach its maximum retail potential.

## OUR DATA

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Retail Attractions compiles data from a number of sources including Nielsen-Claritas, Applied Geographic Solutions (AGS), the client City, various state agencies, the US Census Bureau, the US Economic Survey and information from the US Bureau of Labor. The primary sources for the demographic information included in this report are Nielsen-Claritas SiteReports and Applied Geographic Solutions (AGS).

Both Nielsen-Claritas and AGS pull data from public and private sources and apply their proprietary algorithm to determine demographic projections and estimates. Retail Attractions has carefully analyzed the resulting statistics and determined the algorithms that best represent the client community and trade area.

Nielsen-Claritas and AGS are highly respected data providers in the retail industry, and both sources calculate estimates for the current year and projections for five years in the future. Both companies produce data at varying geographic levels including national, state, county, city/town, zip code, and block group. These estimates and projections on a defined population can be analyzed according to population characteristics such as age, sex, race, Hispanic ethnicity, income, education, occupation, housing or rate of growth.

The majority of the demographic data contained in this report comes from AGS, with the exception of the housing data. The housing data is from Nielsen-Claritas which provides data up to the year prior to the year of the report. As mentioned previously, the opportunity gap data is from Nielsen Claritas Retail Market Power™ (RMP). The RMP data allows you to compare supply and demand to determine potential sources of revenue growth at any standard or user defined geographic level.

If there are any questions about the data used in this report, please contact Retail Attractions, and we will be happy to answer your questions.

# ACKNOWLEDGEMENTS AND DISCLAIMER

## ACKNOWLEDGEMENTS

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Nielsen and Applied Geographic Solutions are both highly respected data providers. However, these companies use algorithms to make estimates and projections. While these estimates and projections are based on years of research and adjustment, they are still only estimates and projections.

## DISCLAIMER

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All information is believed to be accurate and is presented in good faith by Retail Attractions, LLC under the terms and protections of the contract between the Client and Retail Attractions, LLC.

While we do expect to successfully complete the objective of increasing commercial investment in your community, it is impossible to guarantee a level of investment or even any investment since market conditions, retailer's business plans, city policies and other market drivers are subject to change at any time and are beyond the control of Retail Attractions, LLC. You understand and agree that any advice provided under this proposal is true and correct to the best knowledge and ability of Retail Attractions, LLC and will be provided in good faith. The city accepts full responsibility for its decisions to act or not act according to said advice and agrees to indemnify and hold harmless Retail Attractions, LLC; its principals, employees, sub-contractors and associates pertaining to outcomes or situations that arise from the advice, materials or other items provided under this proposal agreement.