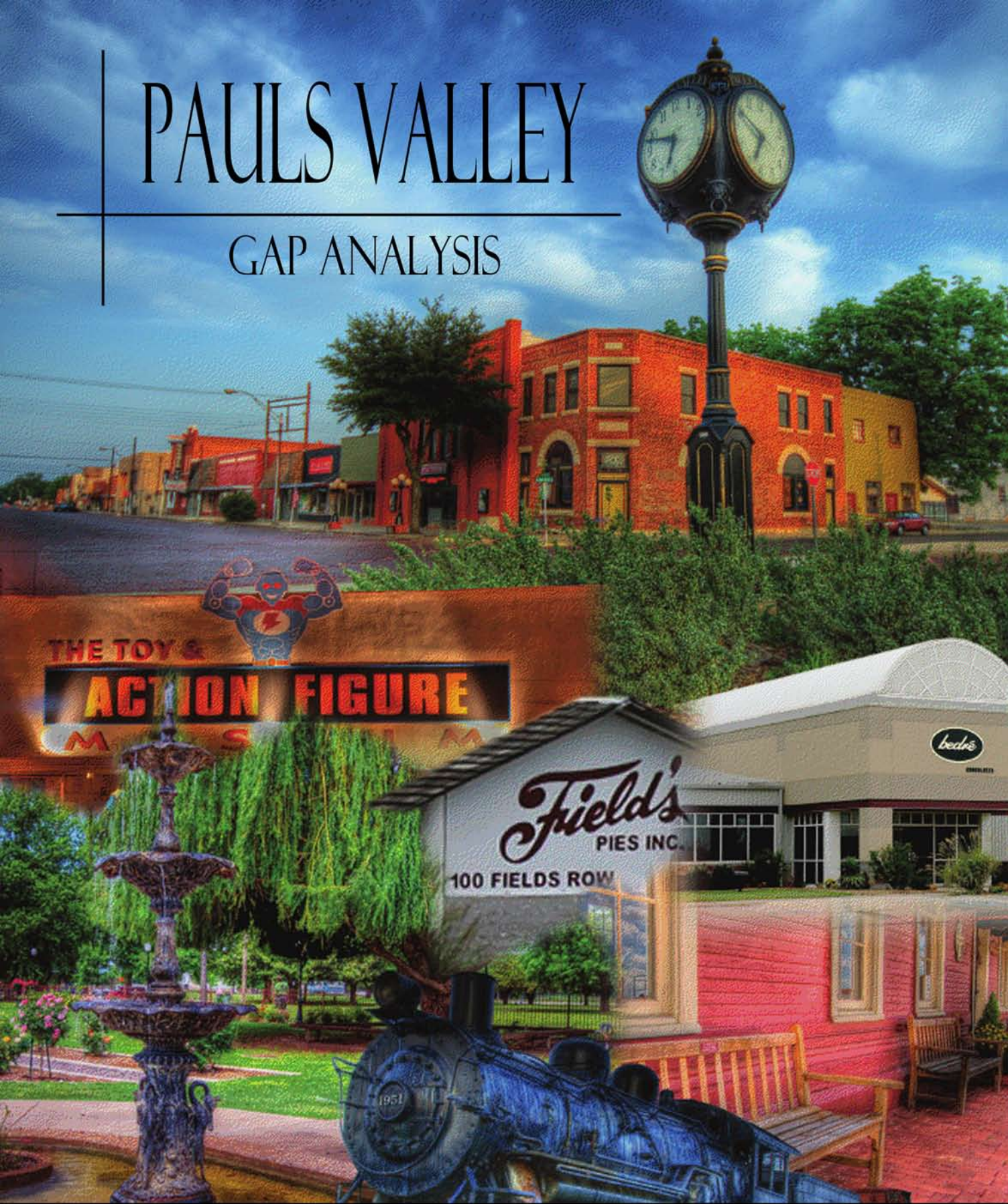


PAULS VALLEY

GAP ANALYSIS



Prepared By



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Contacts

Della Wilson
Pauls Valley Chamber of Commerce
405- 238-6491
della@paulsvalleychamber.com

Ray Murphy
TruVue LLC
918-605-0919
rmurphy@truvuellc.com

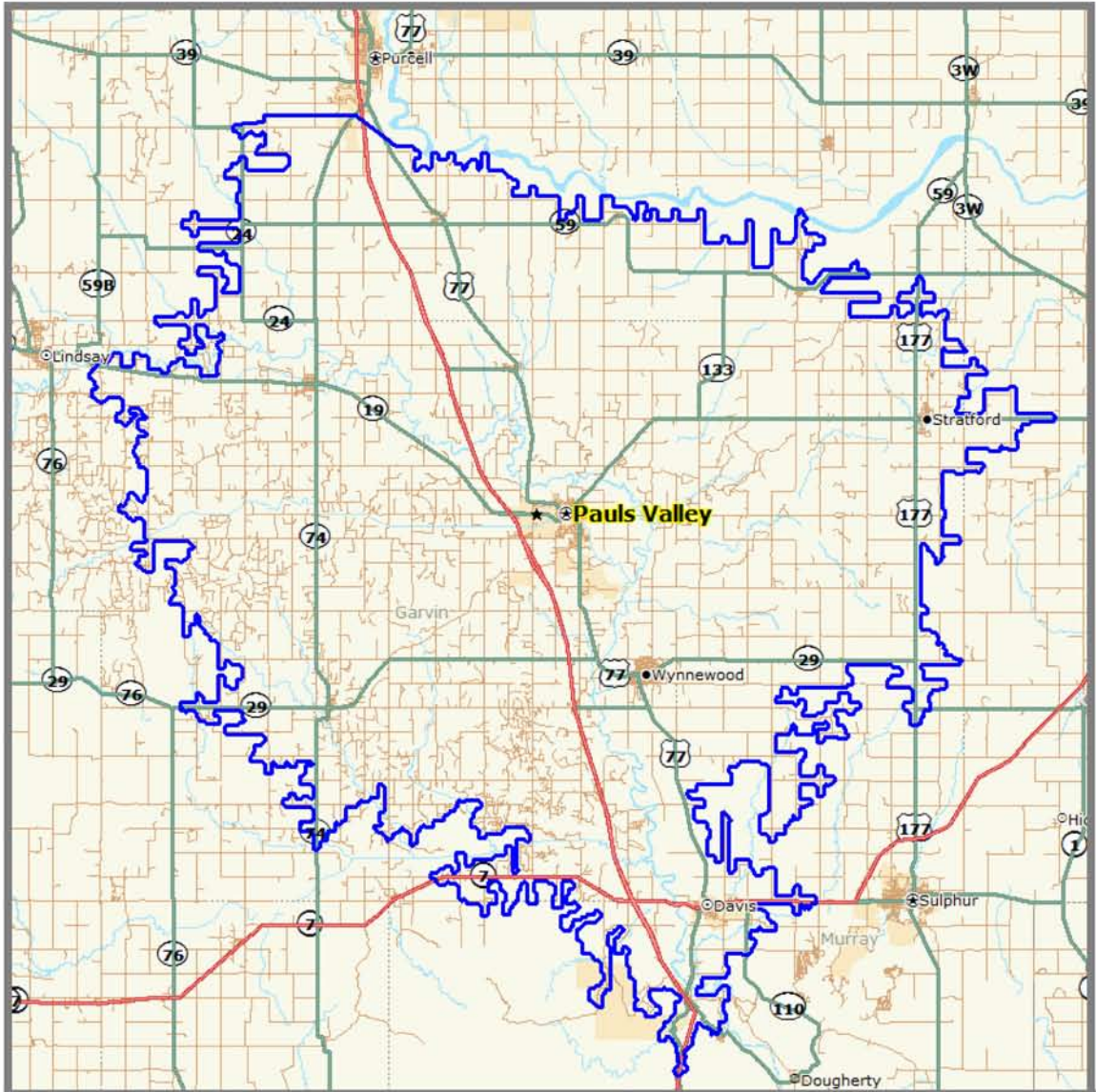
PopStats Demographic Data

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.

Pauls Valley Primary Market Area



Pauls Valley Primary Market Area

**Market Outlook Comparison - GAP
Analysis
Pauls Valley Market Area**



Supporting Demographics (2009)

Household Estimate	11,535
Population Estimate	29,281
Workplace Employees	8,503
Workplace Establishments	717

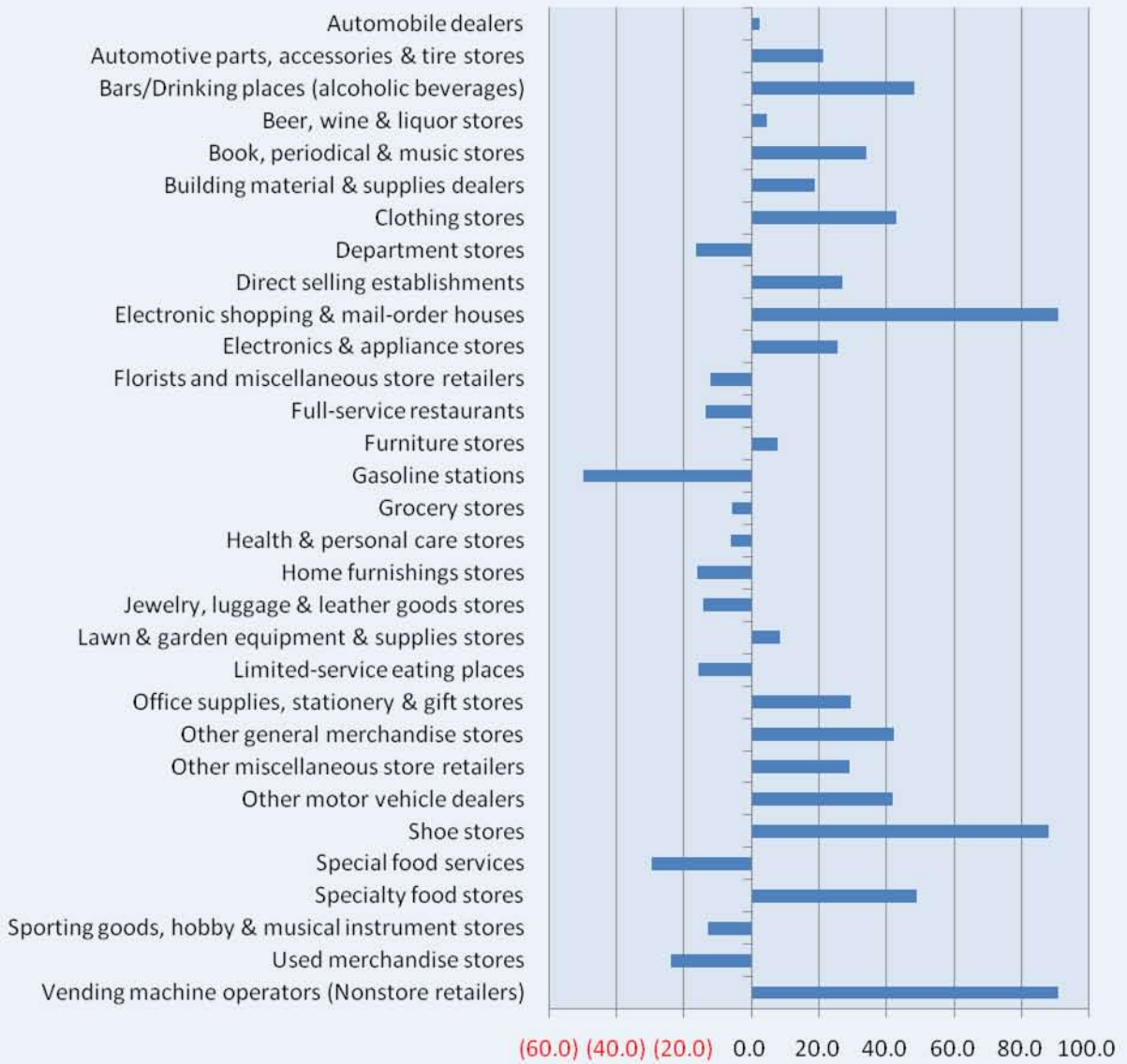
Market Outlook 2009 By Establishment Type	Demand	Supply	GAP	Relative GAP Index
Automobile dealers	\$57,490,435	\$54,134,866	3,355,569	2.5
Automotive parts, accessories & tire stores	\$6,782,245	\$4,524,424	2,257,821	21.2
Bars/Drinking places (alcoholic beverages)	\$1,843,855	\$672,338	1,171,517	48.1
Beer, wine & liquor stores	\$3,731,660	\$3,396,415	335,245	4.4
Book, periodical & music stores	\$3,002,944	\$1,537,343	1,465,601	34.1
Building material & supplies dealers	\$24,047,086	\$16,852,241	7,194,845	18.6
Clothing stores	\$9,545,416	\$3,974,370	5,571,046	43.0
Department stores	\$22,343,924	\$30,068,209	(7,724,285)	(16.6)
Direct selling establishments	\$4,203,513	\$2,508,833	1,694,680	26.8
Electronic shopping & mail-order houses	\$3,102,023	\$0	3,102,023	90.9
Electronics & appliance stores	\$5,554,113	\$3,400,196	2,153,917	25.5
Florists and miscellaneous store retailers	\$633,095	\$778,870	(145,775)	(12.0)
Full-service restaurants	\$13,572,173	\$17,165,796	(3,593,623)	(13.4)
Furniture stores	\$3,980,544	\$3,421,907	558,637	7.6
Gasoline stations	\$42,516,224	\$145,211,079	(102,694,855)	(49.7)
Grocery stores	\$47,700,720	\$52,365,828	(4,665,108)	(5.9)
Health & personal care stores	\$18,801,396	\$20,727,159	(1,925,763)	(6.1)
Home furnishings stores	\$4,534,600	\$6,028,905	(1,494,305)	(16.0)
Jewelry, luggage & leather goods stores	\$2,409,833	\$3,093,102	(683,269)	(14.2)
Lawn & garden equipment & supplies stores	\$5,326,238	\$4,520,199	806,039	8.3
Limited-service eating places	\$17,838,965	\$23,635,580	(5,796,615)	(15.8)
Office supplies, stationery & gift stores	\$3,758,754	\$2,124,746	1,634,008	29.4
Other general merchandise stores	\$32,330,992	\$13,781,401	18,549,591	42.0
Other miscellaneous store retailers	\$7,014,997	\$4,010,993	3,004,004	28.9
Other motor vehicle dealers	\$5,422,301	\$2,325,950	3,096,351	41.8
Shoe stores	\$1,677,564	\$37,316	1,640,248	88.0
Special food services	\$2,768,895	\$5,041,830	(2,272,935)	(29.5)
Specialty food stores	\$808,578	\$288,167	520,411	48.9
Sporting goods, hobby & musical instrument stores	\$4,069,087	\$5,092,656	(1,023,569)	(12.9)
Used merchandise stores	\$1,893,175	\$2,987,504	(1,094,329)	(24.0)
Vending machine operators (Nonstore retailers)	\$3,867,423	\$0	3,867,423	90.9

Market Outlook 2009 By Major Product Line	Demand	Supply	GAP	Relative GAP Index
Alcoholic drinks served at the establishment	\$5,263,073	\$4,023,444	1,239,629	14.0
All other merchandise	\$12,178,563	\$10,111,133	2,067,430	9.5
Audio equipment & musical instruments & related materials	\$2,193,704	\$2,103,576	90,128	1.5
Automotive fuels	\$36,228,853	\$112,667,459	(76,438,606)	(44.1)
Automotive lubricants, including oil, greases, etc.	\$723,108	\$822,912	(99,804)	(7.9)
Automotive tires, tubes, batteries, parts, accessories	\$11,076,125	\$8,611,608	2,464,517	13.1
Autos, cars, vans, trucks & motorcycles	\$47,035,825	\$45,226,980	1,808,845	1.4
Books/Periodicals	\$2,518,468	\$1,268,346	1,250,122	34.8
Children's wear & infants' & toddlers' clothing & accessories	\$2,142,405	\$2,113,542	28,863	(0.0)
Cigars, cigarettes, tobacco & smokers' accessories	\$9,392,363	\$15,141,562	(5,749,199)	(24.9)
Computer hardware, software & supplies, including gaming	\$2,872,218	\$1,200,115	1,672,103	42.8
Curtains, draperies, blinds, slipcovers, bed & table coverings	\$1,295,615	\$1,677,856	(382,241)	(14.7)
Dimensional lumber & other building/structural materials & supplies	\$11,947,228	\$9,108,709	2,838,519	14.1
Drugs, health aids, beauty aids, including cosmetics	\$30,318,495	\$28,875,827	1,442,668	1.9
Flooring & floor coverings	\$3,582,300	\$4,302,723	(720,423)	(10.7)
Footwear, including accessories	\$3,866,933	\$1,991,085	1,875,848	33.8
Furniture, sleep equipment & outdoor/patio furniture	\$8,077,128	\$6,769,039	1,308,089	9.0
Groceries & other food items for human consumption off the premises	\$64,671,851	\$61,763,091	2,908,760	1.8
Hardware, tools & plumbing & electrical supplies	\$6,910,833	\$5,299,342	1,611,491	13.8
Household fuels, including oil, LP gas, wood, coal	\$2,199,888	\$2,771,798	(571,910)	(13.3)
Jewelry, including watches	\$3,335,667	\$4,050,568	(714,901)	(11.3)
Kitchenware & home furnishings	\$4,060,129	\$3,897,612	162,517	1.5
Lawn, garden & farm equipment & supplies	\$6,989,075	\$5,467,984	1,521,091	12.7
Major household appliances	\$1,166,343	\$1,684,074	(517,731)	(20.0)
Meals & nonalcoholic beverages for immediate consumption	\$32,755,054	\$46,767,452	(14,012,398)	(19.5)
Men's wear	\$4,291,795	\$3,677,774	614,021	7.8
Optical goods, including eyeglasses, contact lenses, sunglasses, etc.	\$862,580	\$889,351	(26,771)	(2.5)
Packaged liquor, wine & beer	\$5,942,136	\$8,109,280	(2,167,144)	(17.3)
Paint & sundries / Wallpaper & other flexible wallcoverings	\$2,033,313	\$1,508,825	524,488	15.6
Paper & related products	\$2,034,869	\$2,008,628	26,241	(0.1)
Pets, pet foods & pet supplies	\$2,093,960	\$1,487,757	606,203	17.9
Photographic equipment & supplies	\$330,839	\$391,596	(60,757)	(10.0)
Retailer Services	\$10,644,686	\$9,818,922	825,764	3.7
Sewing, knitting materials & supplies	\$299,219	\$450,178	(150,959)	(21.9)
Small electric appliances	\$451,441	\$541,349	(89,908)	(10.7)
Soaps, detergents & household cleaners	\$2,083,459	\$2,064,092	19,367	(0.3)

Sporting goods, including saddlery, bicycles & motorized sport vehicles	\$5,309,994	\$3,368,264	1,941,730	23.8
Televisions, video recorders, video cameras, video tapes, DVDs, etc.	\$1,728,457	\$1,860,859	(132,402)	(4.9)
Toys, hobby goods & games	\$1,779,305	\$2,108,562	(329,257)	(10.0)
Women's, juniors' & misses' wear	\$9,885,465	\$7,704,967	2,180,498	12.9

*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

