



MARKET OUTLOOK - GAP ANALYSIS



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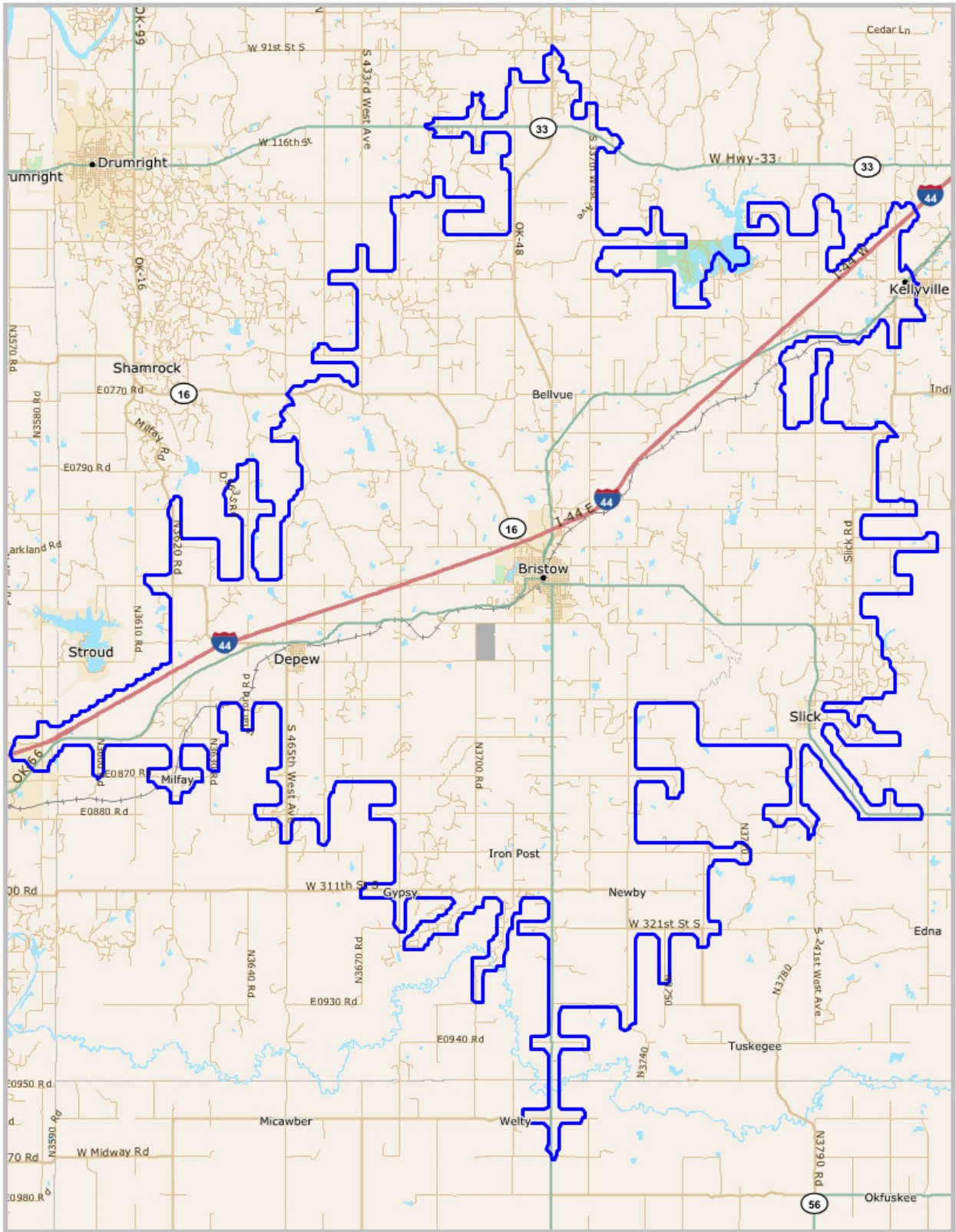
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Bristow Market Area - 15 Minute Drive Area



Market Outlook Comparison - GAP Analysis



Geography: **Bristow - 15 Minute Drive Area**

Supporting Demographics

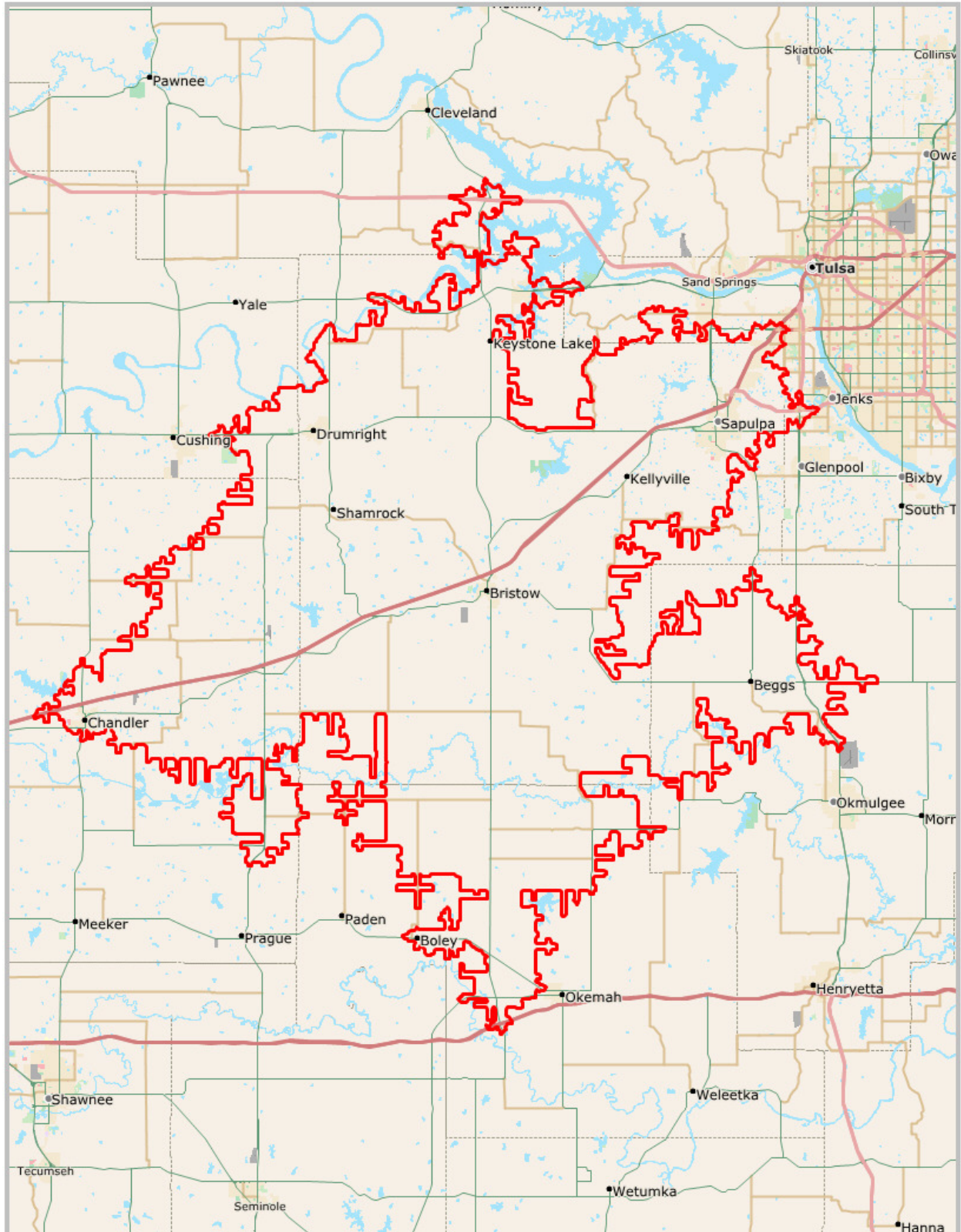
Household Estimate	4,654
Population Estimate	12,069
Workplace Employees	2,410
Workplace Establishments	275

Market Outlook By Establishment Type

	Demand	Supply	GAP
Automobile dealers	\$21,969,381	\$32,961,964	\$-10,992,583
Automotive parts, accessories & tire stores	\$2,705,531	\$1,753,564	\$951,967
Bars/Drinking places (alcoholic beverages)	\$557,343	\$0	\$557,343
Beer, wine & liquor stores	\$1,619,358	\$910,090	\$709,268
Book, periodical & music stores	\$1,062,916	\$1,604,336	\$-541,420
Building material & supplies dealers	\$8,459,228	\$1,342,574	\$7,116,654
Clothing Stores	\$4,014,895	\$0	\$4,014,895
Department Stores	\$8,742,120	\$2,793,510	\$5,948,610
Direct selling establishments	\$1,416,252	\$1,521,753	\$-105,501
Electronic shopping & mail-order houses	\$1,686,015	\$0	\$1,686,015
Electronics & appliance stores	\$2,375,050	\$228,636	\$2,146,414
Florists and miscellaneous store retailers	\$206,618	\$319,367	\$-112,749
Full-service restaurants	\$5,205,195	\$4,614,536	\$590,659
Furniture Stores	\$1,417,515	\$0	\$1,417,515
Gasoline Stations	\$16,142,371	\$19,518,072	\$-3,375,701
Grocery Stores	\$20,459,156	\$13,971,378	\$6,487,778
Health & personal care stores	\$8,505,716	\$4,791,444	\$3,714,272
Home furnishings stores	\$1,545,185	\$777,367	\$767,818
Jewelry, luggage & leather goods stores	\$961,213	\$0	\$961,213
Lawn & garden equipment & supplies stores	\$2,311,838	\$2,613,810	\$-301,972
Limited-service eating places	\$7,218,061	\$4,801,153	\$2,416,908
Office supplies, stationery & gift stores	\$1,359,065	\$198,552	\$1,160,513
Other General Merchandise Stores	\$14,757,481	\$3,368,359	\$11,389,122
Other miscellaneous store retailers	\$2,897,216	\$1,957,003	\$940,214
Other motor vehicle dealers	\$1,482,345	\$1,164,868	\$317,477
Shoe Stores	\$701,241	\$0	\$701,241
Special food services	\$1,065,809	\$1,000,983	\$64,826
Specialty food stores	\$344,699	\$200,791	\$143,909
Sporting goods, hobby & musical instrument stores	\$1,751,954	\$1,887,528	\$-135,573
Used Merchandise Stores	\$798,090	\$1,015,561	\$-217,471
Vending machine operators (Nonstore retailers)	\$1,549,836	\$0	\$1,549,836

Market Outlook By Major Product Line	Demand	Supply	GAP
Alcoholic drinks served at the establishment	\$1,716,652	\$1,159,560	\$557,092
All other merchandise	\$5,013,092	\$2,648,887	\$2,364,205
Audio equipment & music instruments	\$956,824	\$686,488	\$270,337
Automotive Fuels	\$13,416,615	\$15,360,608	\$-1,943,993
Automotive lubricants, including oil, greases, etc.	\$288,739	\$234,471	\$54,268
Automotive tires, tubes, batteries, parts, accessories	\$4,496,556	\$3,672,089	\$824,467
Autos, cars, vans, trucks, motorcycles	\$17,766,949	\$27,269,482	\$-9,502,532
Books/Periodicals	\$919,624	\$1,067,475	\$-147,851
Children's wear & infants' & toddlers' clothing, etc.	\$874,728	\$249,217	\$625,511
Cigars, cigarettes, tobacco & smokers' accessories	\$3,781,804	\$2,751,165	\$1,030,639
Computer hardware, software & supplies, including gaming	\$1,070,788	\$203,582	\$867,207
Curtains, draperies, blinds, slipcovers, bed & table coverings	\$495,775	\$233,350	\$262,425
Dimensional lumber & other building/structural materials & supplies	\$4,090,249	\$679,584	\$3,410,665
Drugs, health aids, beauty aids, including cosmetics	\$13,857,870	\$6,073,997	\$7,783,873
Flooring & floor coverings	\$1,160,936	\$436,980	\$723,956
Footwear, including accessories	\$1,611,103	\$306,689	\$1,304,414
Furniture, sleep equipment & outdoor/patio furniture	\$2,956,841	\$636,437	\$2,320,404
Groceries & other food items for human consumption off the premises	\$28,236,430	\$14,902,614	\$13,333,816
Hardware, tools & plumbing & electrical supplies	\$2,440,970	\$557,847	\$1,883,123
Household fuels, including oil, LP gas, wood, coal	\$681,721	\$894,767	\$-213,046
Jewelry, including watches	\$1,365,991	\$177,381	\$1,188,610
Kitchenware & home furnishings	\$1,600,162	\$639,809	\$960,354
Lawn, garden & farm equipment & supplies	\$2,909,421	\$2,575,853	\$333,568
Major household appliances	\$495,713	\$160,847	\$334,866
Meals & nonalcoholic beverages for immediate consumption	\$13,070,417	\$9,888,812	\$3,181,605
Men's wear	\$1,789,017	\$454,624	\$1,334,393
Optical goods, including eyeglasses, contact lenses, sunglasses, etc.	\$422,740	\$224,766	\$197,974
Packaged liquor, wine & beer	\$2,561,480	\$1,851,267	\$710,213
Paint & sundries / Wallpaper & other flexible wall coverings	\$703,338	\$136,130	\$567,208
Paper & related products	\$854,047	\$440,376	\$413,670
Pets, pet foods & pet supplies	\$1,114,106	\$493,742	\$620,364
Photographic equipment & supplies	\$160,553	\$51,606	\$108,947
Retailer Services	\$3,890,764	\$4,699,396	\$-808,632
Sewing, knitting materials & supplies	\$131,734	\$124,509	\$7,224
Small electric appliances	\$185,997	\$84,765	\$101,233
Soaps, detergents & household cleaners	\$863,530	\$435,492	\$428,038
Sporting goods, including saddlery, bicycles & motorized sport vehicles	\$1,732,778	\$1,324,840	\$407,938
Televisions, video recorders, video cameras, video tapes, DVDs, etc.	\$750,088	\$276,278	\$473,810
Toys, hobby goods & games	\$803,229	\$517,298	\$285,931
Women's, juniors' & misses' wear	\$4,049,326	\$734,116	\$3,315,210

Bristow Market Area - 30 Minute Drive Area



Market Outlook Comparison - GAP Analysis



Geography: **Bristow 30 Min. Drive Area**

Supporting Demographics

Household Estimate	32,329
Population Estimate	85,719
Workplace Employees	21,395
Workplace Establishments	2,004

Market Outlook By Establishment Type

	Demand	Supply	GAP
Automobile dealers	\$158,146,737	\$108,864,660	\$49,282,077
Automotive parts, accessories & tire stores	\$19,219,619	\$16,728,611	\$2,491,008
Bars/Drinking places (alcoholic beverages)	\$4,530,173	\$2,535,009	\$1,995,164
Beer, wine & liquor stores	\$11,570,587	\$12,296,517	\$-725,930
Book, periodical & music stores	\$7,638,088	\$7,018,881	\$619,207
Building material & supplies dealers	\$60,041,818	\$41,556,208	\$18,485,610
Clothing Stores	\$28,692,146	\$13,841,946	\$14,850,200
Department Stores	\$62,342,249	\$25,115,492	\$37,226,757
Direct selling establishments	\$10,075,665	\$3,424,215	\$6,651,449
Electronic shopping & mail-order houses	\$12,151,413	\$0	\$12,151,413
Electronics & appliance stores	\$18,333,005	\$4,261,428	\$14,071,578
Florists and miscellaneous store retailers	\$1,469,826	\$1,314,992	\$154,835
Full-service restaurants	\$40,024,838	\$26,816,023	\$13,208,815
Furniture Stores	\$10,134,569	\$0	\$10,134,569
Gasoline Stations	\$115,232,516	\$107,064,520	\$8,167,996
Grocery Stores	\$145,150,723	\$52,143,926	\$93,006,797
Health & personal care stores	\$60,291,758	\$37,947,190	\$22,344,568
Home furnishings stores	\$11,001,509	\$2,302,230	\$8,699,279
Jewelry, luggage & leather goods stores	\$6,864,355	\$2,231,894	\$4,632,462
Lawn & garden equipment & supplies stores	\$16,444,407	\$7,226,346	\$9,218,061
Limited-service eating places	\$54,494,791	\$42,503,220	\$11,991,571
Office supplies, stationery & gift stores	\$9,869,544	\$5,471,638	\$4,397,906
Other General Merchandise Stores	\$105,025,641	\$46,075,582	\$58,950,059
Other miscellaneous store retailers	\$20,524,250	\$10,702,091	\$9,822,159
Other motor vehicle dealers	\$10,628,979	\$7,293,359	\$3,335,620
Shoe Stores	\$5,003,848	\$3,780,416	\$1,223,431
Special food services	\$8,071,148	\$8,253,090	\$-181,942
Specialty food stores	\$2,445,470	\$866,212	\$1,579,258
Sporting goods, hobby & musical instrument stores	\$12,516,249	\$3,424,358	\$9,091,891
Used Merchandise Stores	\$5,708,099	\$3,016,732	\$2,691,367
Vending machine operators (Nonstore retailers)	\$11,120,365	\$2,739,435	\$8,380,930

Market Outlook By Major Product Line	Demand	Supply	GAP
Alcoholic drinks served at the establishment	\$14,072,326	\$9,251,392	\$4,820,934
All other merchandise	\$35,907,606	\$18,037,246	\$17,870,360
Audio equipment & music instruments	\$6,866,747	\$3,760,022	\$3,106,724
Automotive Fuels	\$95,875,820	\$82,242,704	\$13,633,116
Automotive lubricants, including oil, greases, etc.	\$2,039,742	\$1,537,218	\$502,524
Automotive tires, tubes, batteries, parts, accessories	\$31,881,084	\$21,955,255	\$9,925,829
Autos, cars, vans, trucks, motorcycles	\$127,948,065	\$91,100,629	\$36,847,436
Books/Periodicals	\$6,575,662	\$4,558,547	\$2,017,115
Children's wear & infants' & toddlers' clothing, etc.	\$6,218,015	\$3,522,284	\$2,695,731
Cigars, cigarettes, tobacco & smokers' accessories	\$26,566,716	\$15,132,602	\$11,434,114
Computer hardware, software & supplies, including gaming	\$9,487,038	\$2,904,902	\$6,582,136
Curtains, draperies, blinds, slipcovers, bed & table coverings	\$3,581,492	\$1,888,613	\$1,692,879
Dimensional lumber & other building/structural materials & supplies	\$28,939,122	\$19,850,137	\$9,088,985
Drugs, health aids, beauty aids, including cosmetics	\$98,108,095	\$46,519,653	\$51,588,441
Flooring & floor coverings	\$8,242,470	\$3,002,267	\$5,240,203
Footwear, including accessories	\$11,494,495	\$6,208,663	\$5,285,832
Furniture, sleep equipment & outdoor/patio furniture	\$21,139,728	\$4,526,541	\$16,613,186
Groceries & other food items for human consumption off the premises	\$200,147,591	\$77,365,476	\$122,782,115
Hardware, tools & plumbing & electrical supplies	\$17,371,753	\$12,103,478	\$5,268,275
Household fuels, including oil, LP gas, wood, coal	\$4,825,944	\$2,608,714	\$2,217,229
Jewelry, including watches	\$9,749,227	\$3,567,425	\$6,181,802
Kitchenware & home furnishings	\$11,346,943	\$4,460,304	\$6,886,639
Lawn, garden & farm equipment & supplies	\$20,665,406	\$10,703,486	\$9,961,920
Major household appliances	\$3,612,850	\$2,077,811	\$1,535,039
Meals & nonalcoholic beverages for immediate consumption	\$98,734,083	\$74,508,192	\$24,225,890
Men's wear	\$12,811,281	\$6,227,902	\$6,583,379
Optical goods, including eyeglasses, contact lenses, sunglasses, etc.	\$3,033,447	\$1,822,770	\$1,210,677
Packaged liquor, wine & beer	\$18,311,212	\$17,067,992	\$1,243,220
Paint & sundries / Wallpaper & other flexible wall coverings	\$4,986,497	\$3,504,831	\$1,481,666
Paper & related products	\$6,057,537	\$2,952,761	\$3,104,776
Pets, pet foods & pet supplies	\$7,944,757	\$2,916,750	\$5,028,007
Photographic equipment & supplies	\$1,159,095	\$536,664	\$622,430
Retailer Services	\$28,218,711	\$18,962,844	\$9,255,867
Sewing, knitting materials & supplies	\$941,177	\$446,121	\$495,056
Small electric appliances	\$1,321,734	\$855,406	\$466,328
Soaps, detergents & household cleaners	\$6,121,032	\$3,251,187	\$2,869,845
Sporting goods, including saddlery, bicycles & motorized sport vehicles	\$12,376,230	\$6,110,522	\$6,265,708
Televisions, video recorders, video cameras, video tapes, DVDs, etc.	\$5,411,542	\$2,579,168	\$2,832,374
Toys, hobby goods & games	\$5,708,324	\$2,857,469	\$2,850,855
Women's, juniors' & misses' wear	\$28,963,770	\$13,330,255	\$15,633,515

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.

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.

Contact

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