BARTLESVILLE, OKLAHOMA
STRATEGIC PLAN UPDATE

February 18, 2013

angeloueconomics

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INTRODUCTION

INTRODUCTION

In August 2012, the City of Bartlesville and the Bartlesville Regional Chamber of Commerce engaged AngelouEconomics to guide the process of updating the Strategic Plan for a Globally Competitive Community, initially completed by AngelouEconomics in 2006. Under direction of the City and the Chamber, AngelouEconomics has focused this Strategic Plan Update first and foremost to evaluate the present conditions of Bartlesville's quality of life and retail market and offer potential strategies to improve the city's quality of life and retail offerings. The Strategic Plan Update also includes a brief overview of major economic and demographic trends and a scorecard evaluation of Bartlesville's progress on implementing the strategies from the 2006 Strategic Plan. It is broken into five separate phases:

PHASE 1	• Economic & Demographic Snapshot
PHASE 2	• Quality of Life Assessment
PHASE 3	• Retail Offerings Assessment
PHASE 4	• Strategic Recommendations
PHASE 5	• Community Scorecard

PUBLIC INVOVEMENT

Throughout each of the five phases of the Strategic Plan Update, community buy-in and stakeholder engagement played a critical role. Focus groups, roundtable discussions, and one-on-one interviews were held with hundreds of business and community leaders. Feedback from the broader community was obtained through a comprehensive online survey that was completed by 1,394 community members, representing 5% of Bartlesville's entire adult population.

The exceptionally high level of response to the community survey is a testament to the involvement of Bartlesville's residents in issues of importance to the community. However, public involvement does not necessarily translate into public consensus and collective decision-making without effective community leadership. Thus, it will be critical for Bartlesville's economic development partners, business leaders, and elected officials to effectively channel this community participation to improve the city's quality of life and retail offerings.

In total, this study comprises nearly 200 pages of analysis, conclusions, recommendations, and supporting data. However, as with all plans, the ultimate success of the strategies presented will largely depend on the degree of commitment and support from the community, including public *and* private stakeholders, in carrying the plan forward and executing its individual strategies.

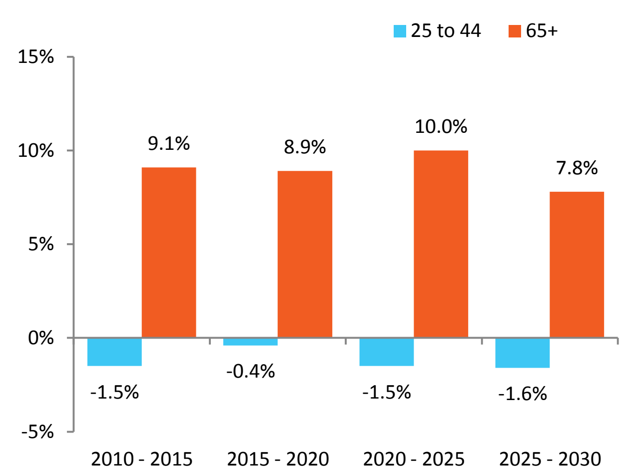
QUALITY OF LIFE AND RETAIL ARE VITAL FOR ECONOMIC DEVELOPMENT

The strongest single indicator of a region's future economic development potential is defined by its ability to grow, retain, and attract a well-educated workforce, particularly the 25-44 age cohort. In earlier decades, the main economic development focus of communities was to attract companies; however, a transformational shift has taken place in recent years. Today, and in the future, the most successful communities will be those that are able to attract talented people. In order to expand and diversify its economy, Bartlesville must prioritize strategies to attract and retain skilled workers, while also taking steps to develop a pipeline of future talented workers through targeted investments in educational systems.

Projections from the U.S. Census Bureau indicate that the 25-44 age cohort will decline significantly as a percentage of total U.S. population over the next two decades, further intensifying the competition among communities to attract talented workers. *(See chart to the right).* Thus, it will be critical for Bartlesville to improve its "human capital" through ongoing investments in the region's workforce and educational systems, while also leveraging the region's unique assets to enhance the city's quality of life and retail offerings to retain and attract skilled workers. The ongoing support of Bartlesville's existing retail and restaurant business, in addition to the growth of new businesses, will become increasingly important. Likewise, sustained investments in Bartlesville's parks and recreation infrastructure will be necessary to better serve current and future residents.

Communities that place high standards on the development of public and private spaces, and cultivate their unique natural, cultural, and historical assets will outperform other communities in the intensifying global competition to attract companies as well as skilled workers. Moreover, the health of a city's downtown is key to the economic vitality of the entire city. History has taught us that when communities let their urban cores decay, they often face substantial economic problems that can take decades to overcome, and in some cases, may never be completely reversed. Therefore, Bartlesville's ability to successfully improve its quality of life and retail market will be closely linked to its downtown revitalization efforts. There is a considerable positive momentum in the transformation of downtown Bartlesville into a vibrant mixed-use district, but business and government leaders must maintain a high level of priority on the continued development of Bartlesville's urban core.

Projected Change in Population Makeup, U.S. 2010 - 2030



Source: U.S. Census Bureau

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EXECUTIVE SUMMARY

OVERVIEW OF ECONOMIC & DEMOGRAPHIC TRENDS

Bartlesville has numerous economic and demographic strengths including a stable economy with a large amount of high-quality jobs and a well-educated workforce. Bartlesville also faces significant demographic challenges, most notably a minimal population growth rate and an aging population.

Job growth in Bartlesville over the last several years has been remarkably strong, with a growth rate of nearly 20% from 2000 to 2011, contributing to an unemployment rate (4.9% in 2011) that has been consistently lower than state and national averages. Unfortunately, this strong job growth has not translated into equally strong population growth in Bartlesville. In fact Bartlesville's population grew by only 2.5% from 2000 to 2010, almost four times slower than the national growth rate of 9.7%. The huge disparity between population growth and job growth over the last decade indicates that Bartlesville's workforce is increasingly choosing to live outside of Bartlesville, primarily in the Tulsa MSA.

Bartlesville continues to struggle in its efforts to attract and retain young professionals.. The city's median age of 40.2 – which is significantly higher than Oklahoma's median age of 35.1 and the U.S. median age of 35.9 – increased 12.7% from 2000 to 2011, a faster growth rate than Oklahoma (9.1%) and the U.S. (12.5%). At the same time, Bartlesville's percentage of population in the young professionals cohort (age 25-44) declined by 4%. The loss of young professionals coupled with meeting the demands of an increasingly older population is a nationwide challenge that Bartlesville will need to address in order to strengthen its long-term economic growth potential.

Bartlesville is a well-educated community, with over 28% of Bartians holding a Bachelor's degree or higher, compared to only 23.1% for the State of Oklahoma as a whole, yet in the most recent decade the city has fallen behind in maintaining the growth of advanced degrees within its population. The percentage of population in Bartlesville with a Bachelor's degree or higher declined by about 5% from 2000 to 2011, while the population with a Bachelor's degree or higher grew by 14% in Oklahoma and by 17% in the U.S. as a whole. The decline in individuals with college degrees has significant ramifications for Bartlesville's future, including the ability of its major employers to expand within the community.

Bartlesville's median household income of $46,152 is greater than the Oklahoma's median household income of $44,173, but significantly lower than the U.S. median household income of $54,398. Bartlesville's median household income grew by a 2.7% compound annual growth rate (CAGR) from 2000 to 2011, slightly less than Oklahoma's CAGR of 2.8%, but higher than the U.S. CAGR of 2.4%. However, despite a steady growth in median income over the last decade, Bartlesville, has undergone a substantial increase in poverty rates, contributing to a growing income disparity within the community. Bartlesville's poverty rate of 10.7% is lower than Oklahoma's poverty rate of 11.9%, but is growing at a much faster pace. Bartlesville's poverty rate grew by 13.8% from 2000 to 2010, compared to a 6.3% increase in Oklahoma's poverty rate during the same period.

OVERVIEW OF QUALITY OF LIFE ASSESSMENT

Bartlesville residents enjoy a high overall quality of life thanks to its unique combination of small-town traits (low cost of living, low crime, strong local businesses) and big-city traits (major corporate presence, wide array of cultural amenities, access to Tulsa, and an authentic downtown district). However, while Bartlesville is considered a great community for families and seniors, the city does not currently live up to the quality of life expectations of many young professionals due to its limited entertainment, nightlife, and recreational opportunities.

Bartlesville's failure to appeal to the quality of life desires of young professionals and those under the age of 45 is one of the city's most urgent challenges because it limits all aspects of the community's growth potential (population and household growth, business expansion/attraction, retail sales growth) and long-term economic health. This phenomenon can be seen both quantitatively – in the continuing trends of a growing median age and shrinking percentage of population in the 25-44 age cohort – as well as qualitatively – in the lower levels of satisfaction of Bartlesville's quality of life amenities as rated by those under age 45 when compared to those above age 45. Efforts to address the quality of life gaps identified by Bartlesville's residents (particularly those residents in the 25-44 age group) should receive priority from public sector and private sector leaders.

Bartlesville's K-12 educational quality is highly regarded, yet its K-12 facilities do fall short of this high standard. Bartlesville's residents rate their satisfaction with the educational quality of K-12 schools much higher than their satisfaction with the quality of the physical K-12 facilities. The implications of this mismatch between the quality of academics and facilities are wide-reaching and of critical importance. The physical quality and appearance of a community's schools is often the most important factor in the determining the perception of the quality of that community as a whole by first-time visitors. Nothing sends a more positive message to the outside world than a city making a major investment in its schools. Bartlesville's business and government leaders have an opportunity to move forward past failed school bond efforts by galvanizing public support for an unprecedented investment in the city's public schools. This will make a statement to residents, businesses, and visitors that "We the city of Bartlesville are making an investment in our children's future and we care about and believe in the long-term prospects of our community."

Bartlesville undoubtedly possesses several unique parks and recreation assets (Pathfinder Parkway, Doenges Field, Kiddie Park) that contribute to the city's quality of life. Yet, the community's parks and athletic facilities are perceived by many residents as sub-standard and not well-maintained. Moreover, Bartlesville simply does not have the necessary sports/athletic facilities to hold large youth sports tournaments (primarily soccer, baseball, and softball). The result is a negative outcome for both Bartlesville's quality of life – because Bartlesville families that participate in competitive youth sports are forced to travel regularly to other cities for tournaments – and for Bartlesville's retail market and economy as a whole – because the city is currently missing out on thousands of potential visitors and millions of dollars of potential retail/restaurant sales due to the inability to host major youth sporting events.

BARRIERS TO RETAIL SECTOR GROWTH

In addition to the specific location criteria (market size, income levels, nearby competitors, spending habits of residents, etc.) that are unique to each retailer when considering a new store location, some of the most important factors that retailers look for in establishing new locations or expanding existing locations include:

- A rapidly growing population
- Steady job growth
- Rising income levels
- Communities or districts that receive large numbers of visitors

A major goal of this Strategic Plan Update is to identify opportunities for attracting new retail establishments to Bartlesville. Community input received through surveys, focus groups, and interviews clearly shows that Bartlesville's residents are not satisfied with the city's existing retail and restaurant offerings. A close look at Bartlesville's retail market indicates that the city currently loses a significant amount of retail sales (about $16 million in net leakage per year) to surrounding communities, primarily in the Tulsa metro area. Unfortunately, this problem cannot be solved easily or quickly because Bartlesville faces several strong barriers to growing its retail market including:

- Its small market size
- Stagnant population growth, despite strong job growth
- Rapid growth in poverty rates
- Continued loss of retail sales to Tulsa metro area
- Under-utilization of unique assets to support tourism growth

SOLUTIONS TO EXPAND RETAIL OFFERINGS

Bartlesville's retail market will only grow and thrive in the way that the city's residents desire if two outcomes happen:

- 1. Bartlesville grows its population at a much faster rate, while continuing to expand its economic base through the creation of more "primary jobs"*
- 2. Bartlesville creates new events and visitor destinations and more fully capitalizes on its existing tourist attractions/events to substantially increase the amount of visitor spending in the local economy

There are also a wide range of public policy interventions and community initiatives that can be implemented to improve Bartlesville's business climate for retail/restaurant businesses, generating incremental improvements over time to Bartlesville's retail market. However, it is critical to note that incremental improvements through policy changes or marketing initiatives will not lead to the transformational changes that are desired to drastically improve Bartlesville's retail offerings.

Thus, AngelouEconomics has focused the recommendations in this report – not only the Retail Enhancement Strategies, but also the Priority Projects and Quality of Life Strategies – to address the two outcomes (population growth and visitor attraction) that will have the greatest positive impact on Bartlesville's retail offerings, while also providing strategies that will yield further incremental improvements to Bartlesville's retail market.

*Primary jobs are jobs which produce goods and services in excess of what can be consumed by the local market.

IMPORTANCE OF DOWNTOWN

The vast majority of retail sales in Bartlesville occur outside of the downtown area. This is true for virtually every city and metropolitan area in the United States. Because of this, it can be easy to dismiss the importance of downtown Bartlesville to the city's retail market. It is important to note that if Bartlesville's downtown area continues to become a more vibrant district – both as a tourist destination and a quality of life amenity for current residents – it will draw more visitors and residents to Bartlesville. And the growth in visitors and residents that result from a rejuvenated downtown district will improve the growth prospects and health of retail stores and restaurants throughout Bartlesville, not only in the downtown area. In fact, it is likely that the vast majority of additional retail sales will take place in shopping centers outside of downtown and retailers in these areas will experience first-hand the benefits of a thriving central business district. By the same token, the continued success of downtown as an arts/culture/entertainment destination will be critical to the city's efforts aimed at improving its quality of life to better serve current residents and to attract more residents.

This Strategic Plan Update is a citywide effort; however, downtown Bartlesville – with its large corporate base, arts/culture amenities, historical sites – is collectively the city's most unique asset and its strongest competitive advantage. As such, strategies that place an emphasis on continuing and accelerating the positive momentum already taking place in the revitalization of downtown Bartlesville will need to play an important role in efforts to improve the city's quality of life and retail offerings.

NEED FOR MORE TRUST AND COLLABORATION

One of Bartlesville's biggest strengths is its well-educated population that is actively engaged in community discussions, volunteerism, and philanthropy. However, despite this high level of civic engagement and willingness to be involved in community improvement efforts, Bartlesville has not been successful in achieving public consensus and taking action on major efforts to improve the city's future. There is a strong undercurrent of conflict among Bartlesville's various stakeholder groups, including the community's business and government leaders, that limits the city's ability to properly leverage its citizens' willingness to improve the community for current and future generations. This is evident in the numerous ballot initiatives for major K-12 school investments and quality of life bonds that have been voted down by the community. Bartlesville's divisiveness can also be seen in the fragmented nature of its more than 300 community organizations. The failure to reach public consensus and move forward as a community is also evident in the lack of trust between the community's economic development partners (the City of Bartlesville, the Bartlesville Regional Chamber of Commerce, and the Bartlesville Development Corporation, among others).

All of these challenges can and must be addressed through bold leadership, decisive actions and a renewed spirit of collaboration between Bartlesville's government and business leaders so that the city can blaze a new path toward a more prosperous future and an improved quality of life for current and future residents.

STRATEGIC RECOMMENDATIONS

A targeted set of Strategic Recommendations is offered to focus Bartlesville's business and government leaders on the most effective solutions available to address the city's most pressing quality of life and retail challenges, while capitalizing on the most promising opportunities. Each of the recommendations, if successfully implemented, will generate positive outcomes for Bartlesville's quality of life and retail offerings. However, the Strategic Recommendations are organized and focused around the following three areas:

- Priority Projects
- Quality of Life Improvement Strategies
- Retail Enhancement Strategies

PRIORITY PROJECTS

Priority Project 1 – Downtown District: Develop a robust network of public infrastructure centered on downtown Bartlesville to better connect the city's many unique assets, while creating a more user-friendly experience for residents and visitors alike.

Priority Project 2 – Parks & Recreation: Create a high-quality activity complex to serve the current and future needs of Bartlesville residents that attracts thousands of annual visitors, while ensuring that existing parks and recreation assets are properly maintained, improved, and expanded over time.

Priority Project 3 – Public Schools: Generate widespread community support for an unprecedented investment in Bartlesville's K-12 schools that will benefit existing and future residents, while strengthening the city's future economic development prospects.

QUALITY OF LIFE IMPROVEMENT STRATEGIES

Strategy Q1: Accelerate the development of diverse, high-quality housing options throughout Bartlesville.

Strategy Q2: Establish and support the growth of an "Arts District" in downtown Bartlesville.

Strategy Q3: Work with Bartlesville's numerous community organizations to develop a more unified approach to civic engagement and community development, adopting and promoting "One Bartlesville" as the tagline for all of the city's community organizations.

RETAIL ENHANCEMENT STRATEGIES

Strategy R1: Prioritize retail/restaurants as a target industry, focusing on niches that offer the greatest growth potential.

Strategy R2: Enact retail-friendly public policies that create a more favorable climate for the growth of new and existing retail businesses throughout Bartlesville.

Strategy R3: Improve community-wide access to small business and entrepreneur resources.

Strategy R4: Create and aggressively promote a new marketing and branding strategy that reflects Bartlesville's many positive attributes and improves the image Bartlesville projects to the outside world.

Strategy R5: Establish a common theme for downtown Bartlesville as a whole, or a specified district in downtown, that builds on the city's unique history as an oil boomtown and offers local retailers a new avenue for cross-marketing and business development.

ECONOMIC & DEMOGRAPHIC SNAPSHOT

KEY FINDINGS: ECONOMIC TRENDS

Bartlesville has a strong economic base, centered on Conoco-Phillips and Phillips 66, that provides a high number of well-paying professional jobs for residents. In recent years, largely due to a strong national oil and gas industry, Bartlesville has enjoyed experienced economic success as evidenced by its low unemployment rate and strong job growth over the past decade. Maintaining and improving Bartlesville's quality of life and retail offerings, as part of a broader effort focused on the retention and expansion of existing employers and the attraction of new employers, will be crucial for the continued stability and growth of the city's economy.

KEY FINDINGS: DEMOGRAPHIC TRENDS

Bartlesville has a well-educated population and income levels that compare with larger metropolitan areas, but the city has an aging population and has a minimal population growth rate. Bartlesville's government and business leaders must place a strong emphasis on retaining and attracting young professionals to support the city's existing employers while improving the community's long-term economic potential. Strategic investments and public policies aimed at improving Bartlesville's quality of life and strengthening the local retail market will play a major role in enhancing the city's attractiveness to young adults and families.

	Bartlesville, OK	Washington County	Tulsa (MSA), OK	Oklahoma	United States
Population (2011)	36,099	51,513	952,215	3,815,480	311,873,842
Pop. Growth ('00-'10)	2.5%	4.0%	9.1%	8.7%	9.7%
Job Growth ('00-'11)	19.9%	21.1%	-4.7%	3.3%	2.2%
Unemployment Rate, October 2012*	4.8%	5.1%	6.5%	6.2%	8.9%
Labor Force Growth ('90-'11)	20.3%	23.8%	11.6%	16.2%	22.0%
Median Household Income (2011)	$46,152	$46,829	$48,185	$44,173	$54,398
% Bachelor's Degree + (2010)	28.4%	25.3%	25.7%	23.1%	28.5%
% in 25-44 Age Group (2010)	23.9%	22.6%	26.7%	26.2%	27.1%

Source: Research 360/U.S. Census Bureau, Bureau of Labor Statistics

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REGIONAL CONNECTIONS

Although this study examines the City of Bartlesville's economy, quality of life, and retail market , the broader regional economy should not be ignored. Many workers travel across county lines to their places of employment. Evidence of intertwined regional economies is revealed by an analysis of Bartlesville on the county level - Washington County's labor shed – the counties where Washington County workers live – and the commute shed – the counties where Washington County residents work. Bartlesville is not an isolated economy but an important piece of a broader regional economy with inseparable linkages, including a shared labor pool. Bartlesville has particularly strong economic ties to the nearby Tulsa metropolitan area.

Data provided by the U.S. Census Bureau show that nearly 48 percent of employed Washington County residents commute to jobs outside of the county, and nearly 41 percent of jobs in Washington County are filled by workers who live outside of its borders. From an employment and a workforce standpoint, Washington County (Bartlesville) is an integral part of the Tulsa metropolitan area and is, in many ways, highly dependent upon its linkages with outside communities. Regional cooperation is a major contributor to success in economic development.

Regions, not individual cities or counties, are the locus of competitive advantage in the new economy – an economy where human capital plays a much more important role in company and community prosperity.

Bartlesville must also consider its place in the broader global economy. Advancements in technology have made it more likely for local companies to hire workers from around the world, and local residents are more likely than ever to work for companies located in other countries. The close ties between Bartlesville and Houston, largely because of Conoco-Phillips and Phillips 66, are a good example of Bartlesville's connectivity to the global economy. The maps on the following pages illustrate Bartlesville's labor shed and commute shed via Washington County. Further explanation of the various interrelationships between Bartlesville and surrounding communities is provided throughout this report.

Evidence of a Regional Economy

- 47.9% (8,721 residents) of employed Washington County residents work outside of Washington County.
- 40.6% (6,496 workers) of Washington County's workforce live outside of Washington County.

"Bartlesville is becoming a better place for young professionals and young families, but need to continue with recreation growth to bring in young families."

- Community Survey Response

"Being close to Tulsa and Owasso is a good thing, but that also means those can both grab people to live and pay taxes in those towns. We need more shopping, restaurants and recreational/parks district systems!"

- Community Survey Response

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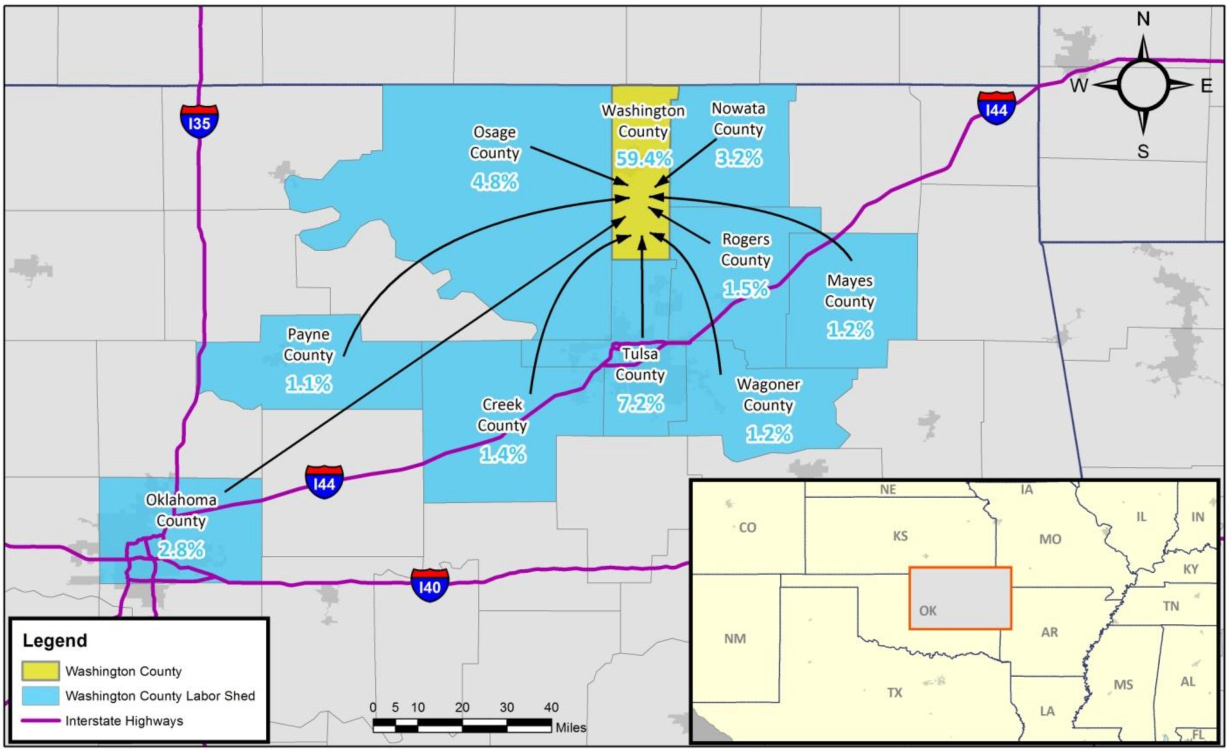
WASHINGTON COUNTY, OK LABOR SHED

WHERE WASHINGTON COUNTY WORKERS LIVE, 2010



TOP 10 COUNTIES WHERE WASHINGTON COUNTY WORKERS LIVE – 2010		
County	**Primary Jobs**	**% of Total**
Washington County, OK	9,489	59.4%
Tulsa County, OK	1,150	7.2%
Osage County, OK	771	4.8%
Nowata County, OK	511	3.2%
Oklahoma County, OK	443	2.8%
Rogers County, OK	242	1.5%
Creek County, OK	231	1.4%
Wagoner County, OK	194	1.2%
Mayes County, OK	185	1.2%
Payne County, OK	182	1.1%
All Other Locations	2,587	16.2%

Nearly 60% of Washington County's labor force resides in Washington County.

- Washington County's economy provides numerous employment opportunities for its residents.
- In 2010, 9,489 primary jobs (59.4% of the total labor force) in Washington County were held by Washington County residents.
- Washington County's labor force also includes a substantial amount of residents from Tulsa County (1,150 or 7.2% of the total), Osage County (771 or 4.8% of the total), Nowata County (511 or 3.2% of the total), and Oklahoma County (443 or 2.8% of the total).

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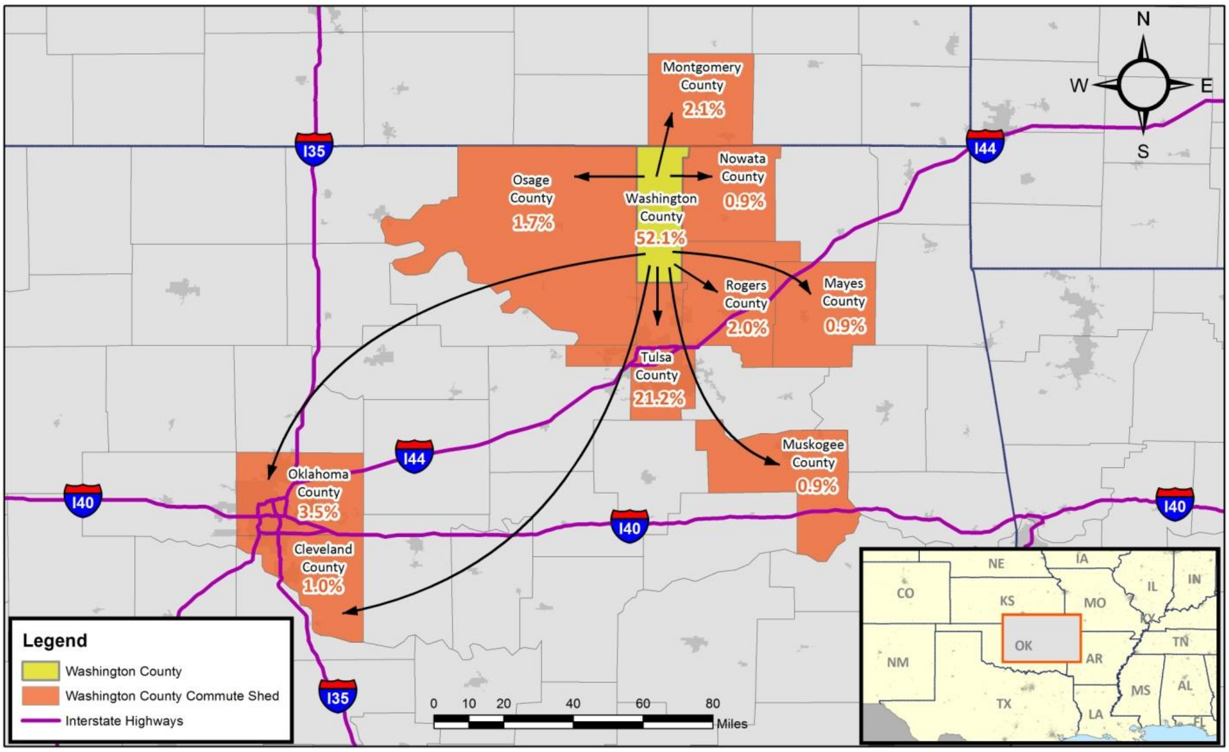
WASHINGTON COUNTY, OK COMMUTE SHED

WHERE WASHINGTON COUNTY RESIDENTS WORK, 2010



TOP 10 COUNTIES WHERE WASHINGTON COUNTY RESIDENTS WORK – 2010		
County	**Primary Jobs**	**% of Total**
Washington County, OK	9,489	52.1%
Tulsa County, OK	3,858	21.2%
Oklahoma County, OK	629	3.5%
Montgomery County, KS	390	2.1%
Rogers County, OK	362	2.0%
Osage County, OK	309	1.7%
Cleveland County, OK	182	1.0%
Muskogee County, OK	161	0.9%
Nowata County, OK	161	0.9%
Mayes County, OK	156	0.9%
All Other Locations	2,513	13.8%

Over 52% of Washington County's employed residents work in Washington County.

- In 2010, slightly more than half of Washington County's employed residents (9,489 residents or 52.1% of Washington County's employed residents) commuted to jobs within Washington County.
- Most of Washington County's employed residents that do not work within Washington County commute into the Tulsa metro area, as evidenced by the significant amount of Washington County residents that commute to Tulsa County for their primary jobs (3,858 residents or 21.2% of the total).

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LOCAL ECONOMY
SELF –SUFFIENCY

Washington County is highly dependent on nearby communities as a source of labor for its businesses while also serving as an employment center for the region.

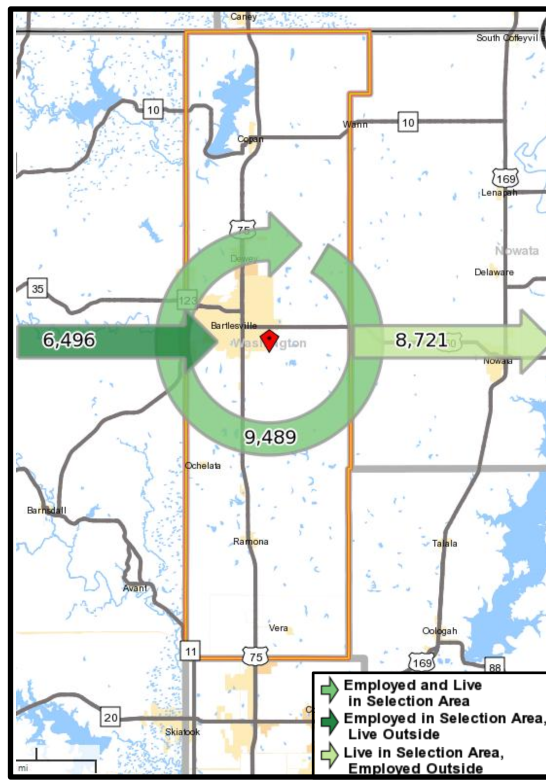
- Very few communities are capable of serving as the source of all labor required for the needs of businesses contained within them or as the location of all jobs for those that live within that community. In fact, occurrences of this happening tend to indicate a rather weakly developed economy.

- In comparison to the 15,217 individuals that traveled regularly into and out of Washington County for work in 2010, 9,489 individuals both lived and worked within the county.

"I have owned a business in Bartlesville for 4 years now and my business has done reasonably well even though the economy has been sluggish. Bartlesville seems to be a little sheltered from different parts of the state because of the income level of the people that live here."

- Community Survey Response

INFLOW/OUTFLOW OF WASHINGTON COUNTY WORKERS, 2010



Source: U.S. Census Bureau On the Map

"If ConocoPhillips or Phillips 66 (or both) pulls out of Bartlesville, then the whole place is in trouble."

- Community Survey Response

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MAJOR EMPLOYERS

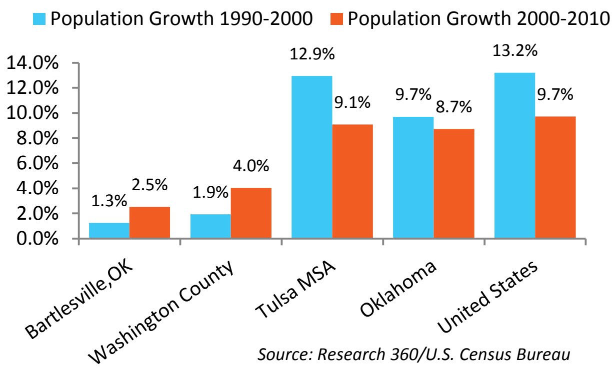
TOP 20 LARGEST EMPLOYERS IN BARTLESVILLE, OK - 2012		
Employers	**Product / Service**	**Employees**
Phillips 66	Refining & Marketing (downstream)	1,900
ConocoPhillips	Exploration & Production (upstream)	1,700
Jane Phillips Medical Center	Hospital/Health Care	1,150
Bartlesville Public Schools	Education	815
Wal-Mart Logistics	Distribution of Grocery Products	800
Wal-Mart Supercenter #41	Retail	450
City of Bartlesville	Government	350
SITEL	Customer Service Center	350
Schlumberger	Electric submersible pumps, etc.	230
Chevron Phillips	Research & Development	203
Diversified Systems Resources	Software & service solutions	200
Arvest Bank	Financial	195
ABB Automation, Inc.	Process control instrumentation	183
SGS	Inspection & Engineering	175
66 Federal Credit Union	Financial	152
Washington County	Government	150
Siemens Energy & Applied Automation	Process control instrumentation	137
Oilfield Pipe & Supply	Rolled & welded pipe	132
Wal-Mart Administrative Services	Claims management	125
United Linen	Commercial linens & uniforms	125

Source: Bartlesville Development Corporation

Bartlesville benefits from the presence of several major corporate, government, and manufacturing employers.

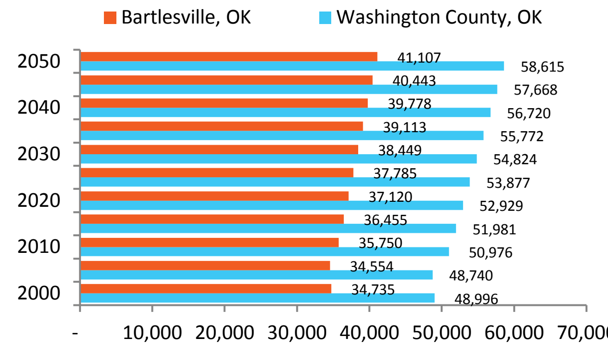
- With 1,900 employees, Phillips 66 is Bartlesville's top employer followed by ConocoPhillips (1,700), Jane Phillips Medical Center (1,150), Bartlesville Public Schools (815), and Wal-Mart Logistics (800).
- Bartlesville's top five employers account for nearly 6,000 jobs – almost 1/3 of Bartlesville's total employment base.

Population Growth



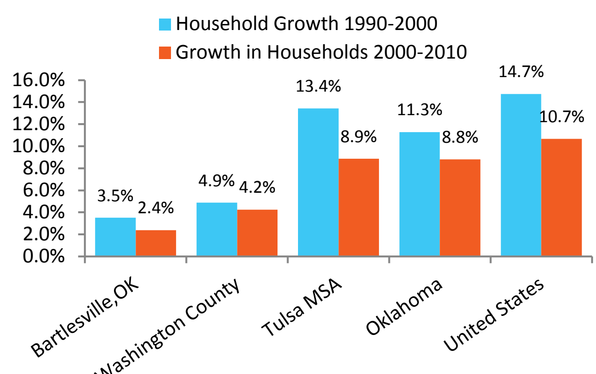
Source: Research 360/U.S. Census Bureau

Population Projections, 2010 - 2050



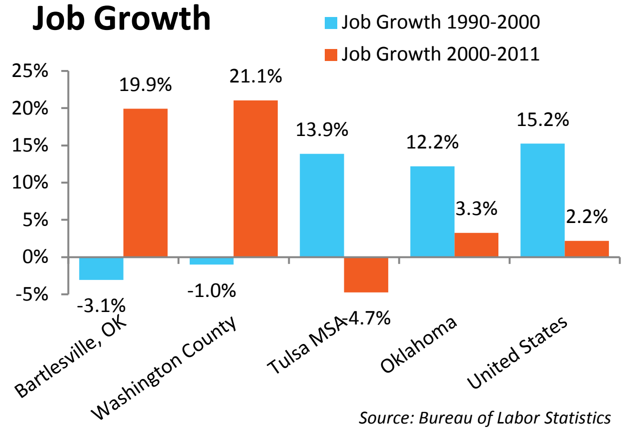
Sources: Oklahoma Department of Commerce, AngelouEconomics

Household Growth



Source: Research 360/U.S. Census Bureau

Job Growth



Source: Bureau of Labor Statistics

POPULATION AND JOB GROWTH

Over the last 20 years, Bartlesville has not experienced the same level of growth in population as experienced across Oklahoma and the U.S. as a whole, despite strong job growth since 2000.

- Bartlesville's population growth rate is minimal compared to the benchmarks, but accelerated over the last decade, growing by 2.5% from 2000 to 2010, compared to 1.3% from 1990 to 2000, despite strong job growth of nearly 20% from 2000 to 2011.
- The disparity between population growth and job growth over the last decade indicated that Bartlesville's workforce is increasingly choosing to live outside of Bartlesville, primarily in the Tulsa MSA.
- Bartlesville's household growth rate is also much lower than the benchmarks, and has declined over the last decade, growing by only 2.4% from 2000 to 2010, compared to 3.5% from 1990 and 2000.
- Population projections for were calculated by AngelouEconomics based on county population projections estimated by Oklahoma's Department of Commerce. Washington County is projected to grow from nearly 50,976 in 2010 to almost 59,000 by 2050. The City of Bartlesville is projected to grow from 35,750 in 2010 to more than 41,000 in 2050.

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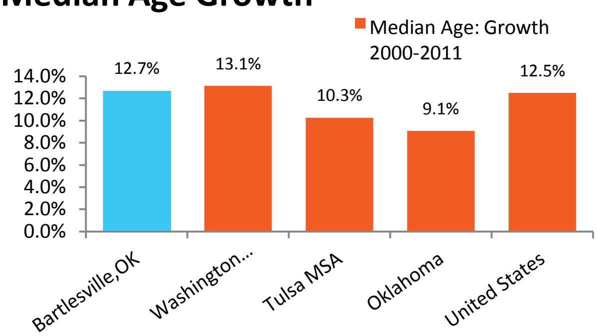
Median Age, 2011	
Bartlesville, OK	40.2
Washington County	40.4
Tulsa MSA	35.5
Oklahoma	35.1
United States	35.9

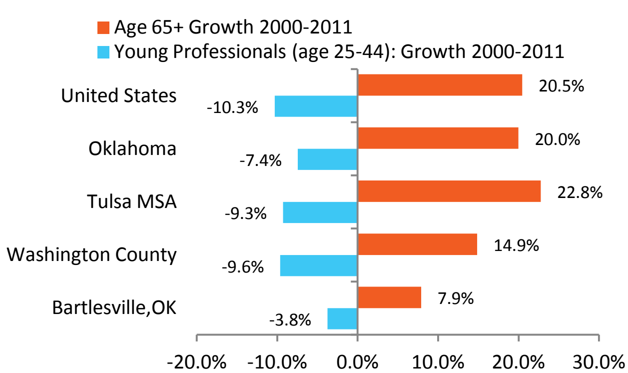
Source: Research 360/ U.S. Census Bureau

Median Age Growth



Source: Research 360/ U.S. Census Bureau

Aging of Population



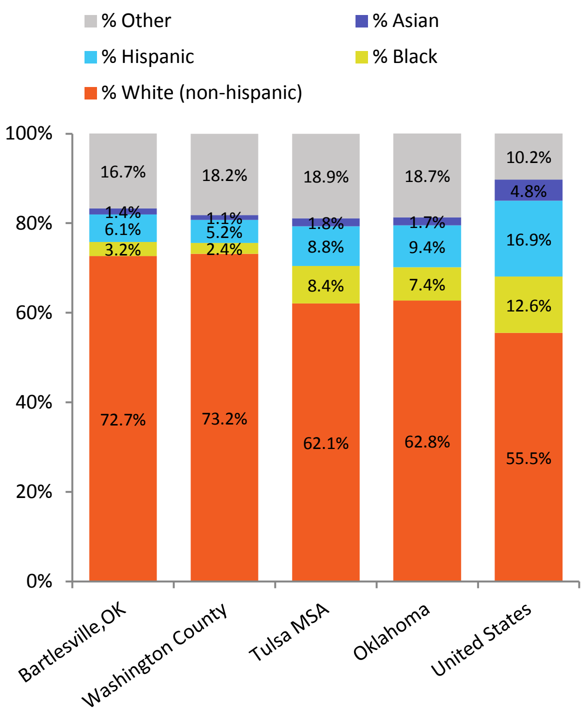
Source: Research 360/ U.S. Census Bureau

AGE COMPOSITION

Over the last decade, the population of Bartlesville has transitioned to an increasingly aging community.

- Bartlesville has a median age of 40.2, which is significantly higher than Oklahoma’s median age of 35.1 and the U.S. median age of 35.9.
- Median age growth increased in Bartlesville by 12.7% from 2000 to 2011, a faster growth rate than Oklahoma (9.1%) and the U.S. (12.5%).
- Bartlesville’s percentage of population in the young professionals cohort (age 25-44) has declined by about 4%, a significantly slower pace than any of the benchmarks from 2000 to 2011.
- Bartlesville’s percentage of population in the 65+ cohort grew at a slower rate than any of the benchmarks from 2000 to 2011.
- Nevertheless, the loss of young professionals coupled with meeting the demands of an increasingly older population is a nationwide challenge that Bartlesville will need to address in order to strengthen its long-term economic growth potential.
- Further, the changing demographics will have wide-range impacts on the design of neighborhoods, the character of the economy, and the city’s ability to remain competitive in attracting new businesses while supporting existing firms.

Distribution of Race/Ethnicity, 2011



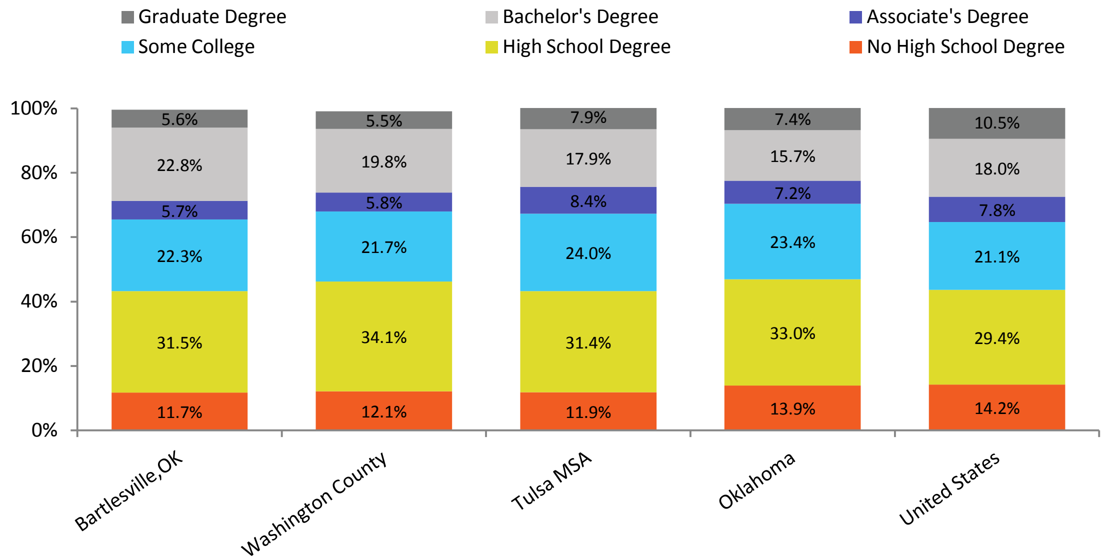
Source: Research 360/ U.S. Census Bureau

RACIAL AND ETHNIC MAKEUP

Bartlesville, OK is less racially diverse than other areas within Oklahoma.

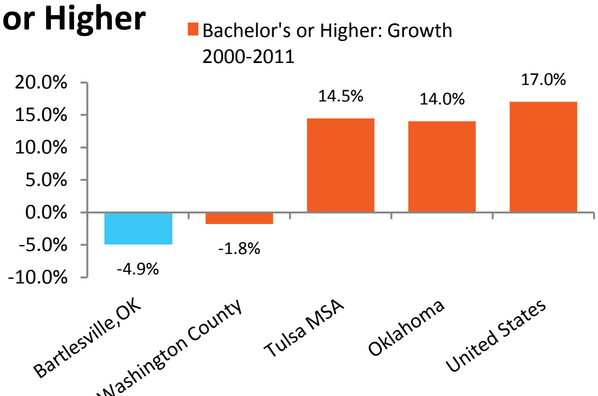
- Bartlesville's largest racial group is White (73%), which is significantly higher compared to other areas of Oklahoma and the U.S.
- Compared to other areas within the state, Bartlesville's population of Hispanics (6.1%) and African Americans (3.2%) are underrepresented within the community.
- The City of Bartlesville, similar to the other communities, has a large percentage of its racial community which identify as some other race (16.7%).
- According to the US Census, "some other race" includes multiracial, interracial, or Hispanic or Latino group (for example, Mexican).
- A lack of diversity can hinder economic development, as businesses and young professionals increasingly seek out diverse areas or, similarly, areas that appear to be welcoming to a wide range of people.

Educational Attainment, 2011



Source: Research 360/ U.S. Census Bureau

Growth of % Bachelor's Degree or Higher



Source: Research 360/ U.S. Census Bureau

2010- 2011 High School Dropout Rate	
Bartlesville, OK	1.4%
Washington County	1.9%
Tulsa, OK	3.6%
Oklahoma	2.3%
United States	7.4%

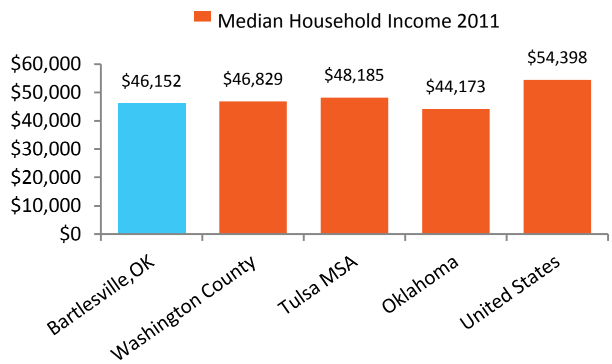
Source: Oklahoma Department of Education and National Center for Education Statistics

EDUCATION

Bartlesville is a highly educated community, particularly compared to the State of Oklahoma as a whole, but the city's ability to maintain its educated workforce is under threat.

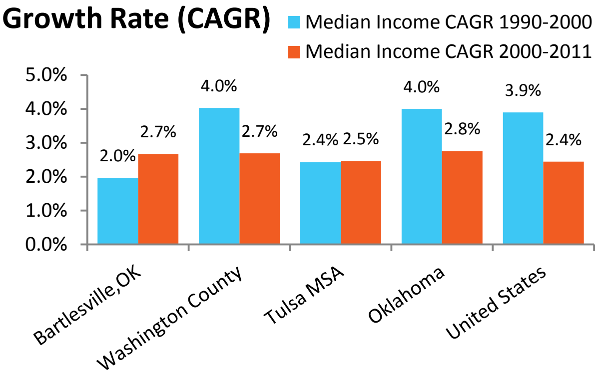
- Over 28% of Bartians have a Bachelor's degree or higher, yet in the most recent decade the community has fallen behind in maintaining the growth of advanced degrees within its population. Moreover, Bartlesville's pool of educated labor has been has been shrinking (-5%) despite growth within the state.
- The decline in individuals with a BA degree or higher has significant ramifications for Bartlesville's future, including the ability of its major employers' and universities to expand within the community.

Median Household Income



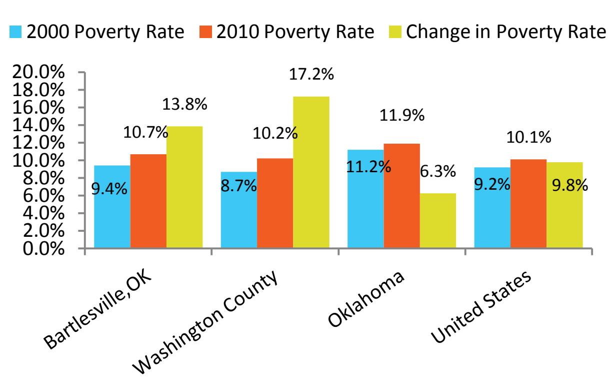
Source: Research 360/ U.S. Census Bureau

Median Income Compound Annual Growth Rate (CAGR)



Source: Research 360/ U.S. Census Bureau

Poverty Rates (2000- 2010)



Source: U.S. Census Bureau
Note: Tulsa 2000 poverty rates unavailable

INCOME AND PROSPERITY

Despite a steady growth in median income over the last decade, Bartlesville, has undergone an increase in poverty rates, contributing to a growing income disparity within the community.

- Bartlesville's median household income of $46,152 is greater than the Oklahoma's median household income, but lower than Washington County, the Tulsa MSA, and the U.S.
- Despite slower median income growth rates in Oklahoma and the U.S. after 2000, Bartlesville has enjoyed steady CAGR of 2.7% from 2000 to 2011, a 35% increase from the previous decade.
- Bartlesville's poverty rate of 10.7% is lower than Oklahoma's poverty rate of 11.9%, but is growing at a much faster pace. Bartlesville's poverty rate grew by 13.8% from 2000 to 2010, compared to a 6.3% increase in Oklahoma's poverty rate during the same period.

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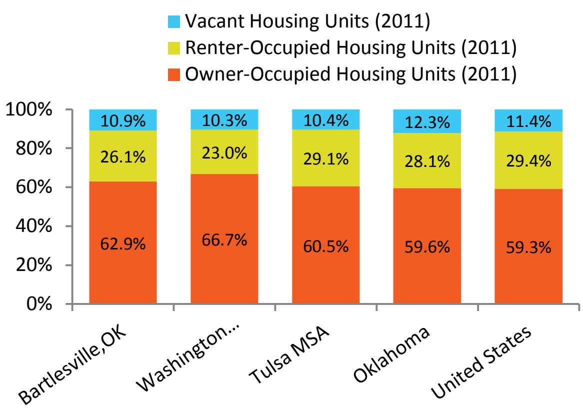
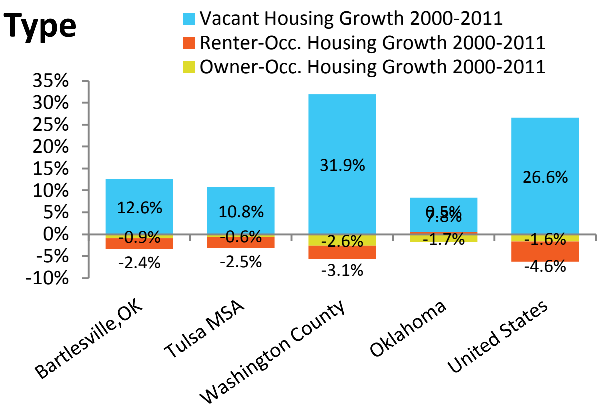
Housing Units by Type



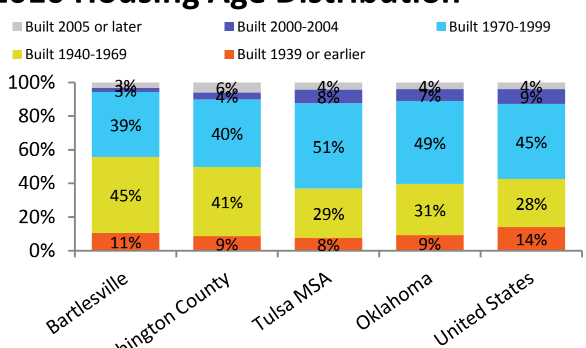
Source: U.S. Census Bureau

Change in Housing Units by Type



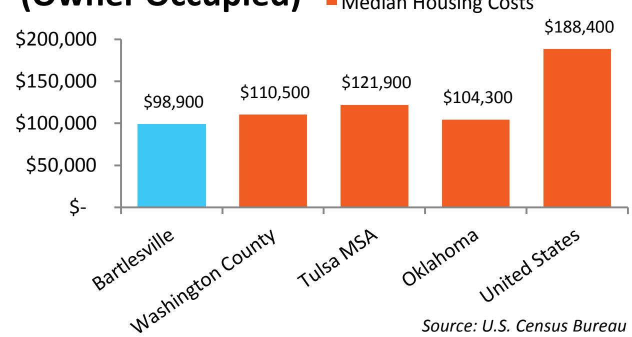
Source: U.S. Census Bureau

2010 Housing Age Distribution



Source: U.S. Census Bureau

2010 Median Housing Costs (Owner Occupied)



Source: U.S. Census Bureau

HOUSING

Housing costs within Bartlesville remain competitive compared to the rest of Oklahoma although the city has an aging housing inventory compared to all of the benchmarks.

- Bartlesville's housing market is predominately owner occupied with 63% occupants owning their home.
- Over the past decade Bartlesville has seen an increase in housing vacancy rates of nearly 13%, about half of the U.S. rate of almost 27%.
- Bartlesville has an older housing stock than all of the benchmarks, with 56% of homes in Bartlesville built before 1970.
- The presence of an aging housing market does make Bartlesville less competitive to potential homeowners looking primarily for newer homes with more modern amenities.

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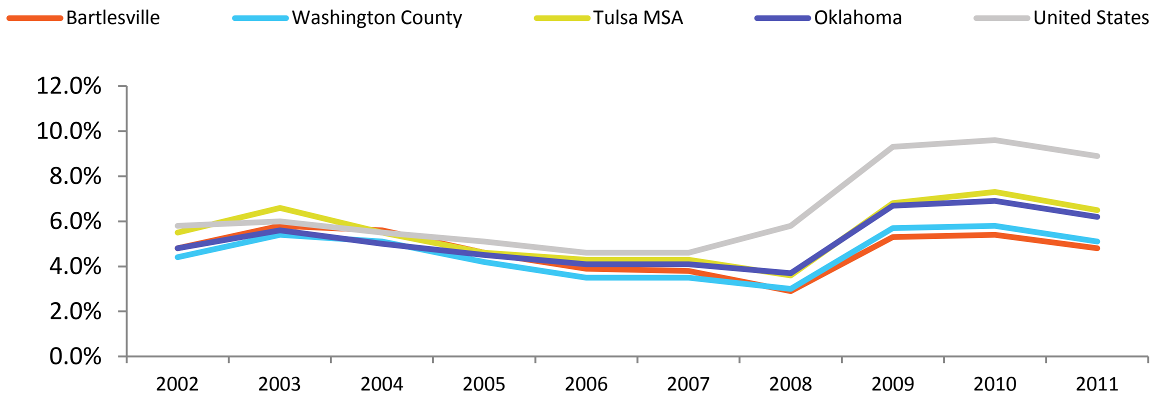
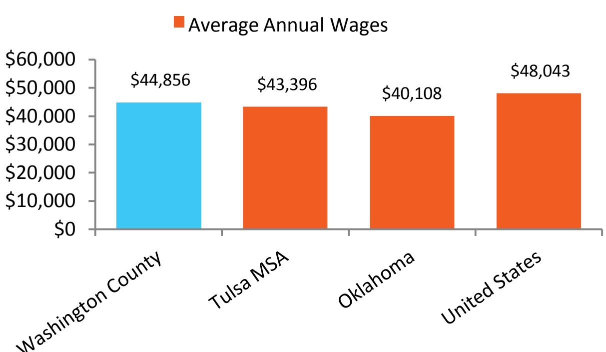
Historical Unemployment Activity



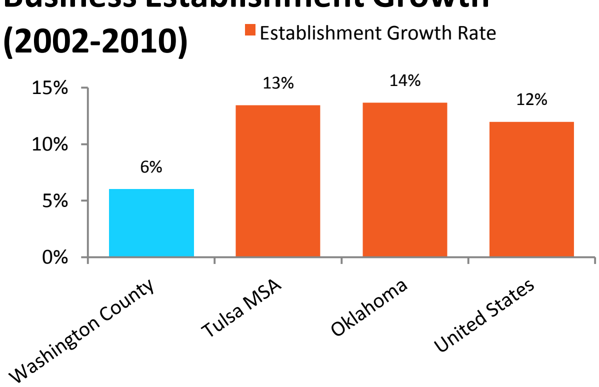
Source: Bureau of Labor and Statistics

2011 Average Annual Wages



Source: Bureau of Labor and Statistics

Business Establishment Growth (2002-2010)



Source: Bureau of Labor and Statistics

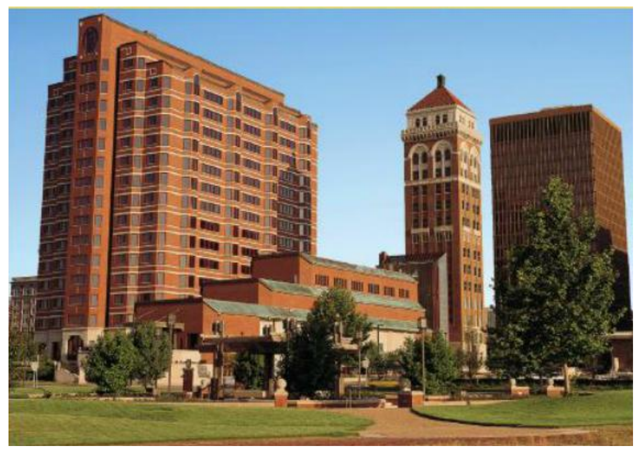
UNEMPLOYMENT AND BUSINESS GROWTH

Bartlesville's unemployment rate has remained well below Oklahoma and U.S. averages in recent years, although business establishment growth has been relatively slow.

- During the last five years, Bartlesville has been able to maintain a substantially lower unemployment rate compared to the U.S., Oklahoma, and the Tulsa MSA.
- Low unemployment rates and relatively high wages can be attributed to the strong presence of several large corporate firms tied to the oil and gas industry, which has performed well in the past decade.
- Despite stable employment and wage trends, business establishment growth has not seen a similar level of growth. A contributing factor may be partially due to Bartlesville relatively stagnant population growth within the past several years.

QUALITY OF LIFE ASSESSMENT

KEY FINDINGS: QUALITY OF LIFE



Bartlesville residents enjoy a high quality of life overall thanks to a low cost of living, low crime, well-performing K-12 schools, high-quality healthcare facilities. Bartlesville also has a number of unique assets for a city with a population of less than 50,000 outside of a metropolitan area, including:

- A major corporate presence anchored by Conoco-Phillips and Phillips 66, together with ABB, Seimens, and Schlumberger
- A wide assortment of "big-city" cultural/recreational amenities (Price Tower, OK Mozart, Symphony Orchestra, Woolaroc, Kiddie Park, Pathfinder Parkway)
- A large, historic downtown district with several thousand professional jobs

Bartlesville is widely regarded as a great community for families and retirees, but the city faces substantial challenges in maintaining and improving its quality of life, particularly for young professionals. Ongoing public investments in Bartlesville's K-12 facilities and parks/recreation assets will be necessary to satisfy the needs of existing residents and to attract future residents. Downtown rejuvenation efforts have yielded positive gains, but must continue and, in fact, accelerate, to achieve downtown's full quality of life and economic development potential.

"Bartlesville is a very lovely place to live."

- Community Survey Response

"The state of the school buildings are hard to overcome even though the teachers and results are positive."

- Community Survey Response

Image Source: Bartlesville Regional Chamber of Commerce

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QUALITY OF LIFE SWOT ANALYSIS

STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS

This section of the report highlights the strengths, weaknesses, opportunities, and threats for Bartlesville's quality of life, as collected through stakeholder discussions, survey information, and quantitative databases. We do not intend for this analysis of issues to be all-inclusive. Rather, we focus on those areas that will have the most direct impact on specific components of future quality of life improvement efforts in Bartlesville.

We define the four aspects of "SWOT" in these terms:

Strengths: Issues or characteristics that can be built upon to advance current and future quality of life opportunities in Bartlesville, OK.

Weaknesses: Issues or characteristics that, if not addressed effectively, could limit the potential for improvements to the quality of life in Bartlesville.

Opportunities: Assets, events, or trends that offer Bartlesville the potential for enhanced quality of life amenities.

Threats: Obstacles, events or trends that, if not addressed effectively, could threaten the city's ability to maintain and improve quality of life offerings in Bartlesville, potentially leading to a lower overall quality of life.

QUALITY OF LIFE IN BARTLESVILLE

STRENGTHS

- Community recognizes the need to maintain and enhance quality of life
- Wide array of cultural amenities/events (Price Tower, Woolaroc Museum & Wildlife Preserve, OK Mozart, Civic Ballet, Choral Society, Community Concert Association, Theater Bartlesville, Children's Musical Theatre, Symphony Orchestra
- Strong employment base with many professional jobs
- Pathfinder Parkway
- Kiddie Park
- Ongoing redevelopment of downtown
- Family-friendly atmosphere
- Some of the best K-12 schools in the State of Oklahoma
- High level of volunteerism within community
- High quality healthcare facilities
- Low crime rates
- Low cost of living
- Proximity to Tulsa and Tulsa Int'l Airport
- Doenges Memorial Stadium

WEAKNESSES

- Quality of K-12 facilities does not match the high quality of academics
- Lack of city pride
- Shortage of rental housing, particularly high quality rentals and short-term housing
- Aging youth sports facilities
- "Bare-bones" budget for city's parks and recreation department
- Difficult to find workers (skilled and unskilled)
- Limited amount of daycare options
- Lack of connectivity between community assets
- Duplication of civic organizations and initiatives
- Absence of community-wide focus for quality of life improvements
- Piece-meal approach to development
- Perception of low quality of life
- Shrinking young professionals population
- Growing poverty

OPPORTUNITIES

- Steady stream of new young professionals, largely due to Conoco-Phillips and Phillips 66
- Modernization of cultural events (appealing to younger audience)
- Multi-sports athletic complex for existing residents and for visitors attending tournaments
- Expansion of Pathfinder Parkway and additional connectivity to downtown
- Potential for "Arts District" in downtown
- More investments in K-12 schools
- Continued redevelopment of downtown
- Apartment occupancy levels in downtown are at or near 100%, signaling strong demand for downtown Housing
- Combine facilities and support staff of community-based organizations to achieve greater efficiencies and results

THREATS

- Difficulty recruiting professional employees, particularly dual-income professional families
- Fractious community
- Power struggle within community
- Decline of OK Mozart
- Lack of community trust
- Growing elderly population
- Continued perception of low quality of life, particularly for young professionals
- History of voting against major public investments in quality of life amenities
- Overly cautious approach toward public spending limits the potential for quality of life improvements

QUALITY OF LIFE: COMMUNITY SURVEY

COMMUNITY SURVEY SUMMARY

As part of the data collection process, an online survey was developed to glean insight from Bartlesville community members on topics related to economic development, quality of life, and retail offerings. The community survey was completed by 1,394 residents. The exceptionally large number of responses to the community survey is a very positive sign that reflects a high level of participation in this project from local stakeholders.

The survey remained online for a four-week period from October 1, 2012 through October 29, 2012. The following pages provide a summary of the community survey results related to quality of life. A detailed breakdown of results from the survey can be found in Appendix A: Detailed Community Survey Results.

BARTLESVILLE'S QUALITY OF LIFE: DEFINING THEMES

A thorough analysis of the quality of life topics in the survey results yielded a handful of defining themes.

- One of Bartlesville's most significant challenges is the retention and attraction of young professionals.
- Bartlesville's K-12 educational quality is highly regarded, yet its K-12 facilities do fall short of this high standard.
- Bartlesville is considered a great community for families and seniors, but not as good for young professionals, recent college graduates, immigrants, and racial/ethnic minorities.
- Bartlesville's parks and athletic facilities are perceived by many residents as sub-standard and not well-maintained.

"Bartlesville is a very good town to work and live in due to lack of crime and a safe, clean, and friendly atmosphere.'"

- Community Survey Response

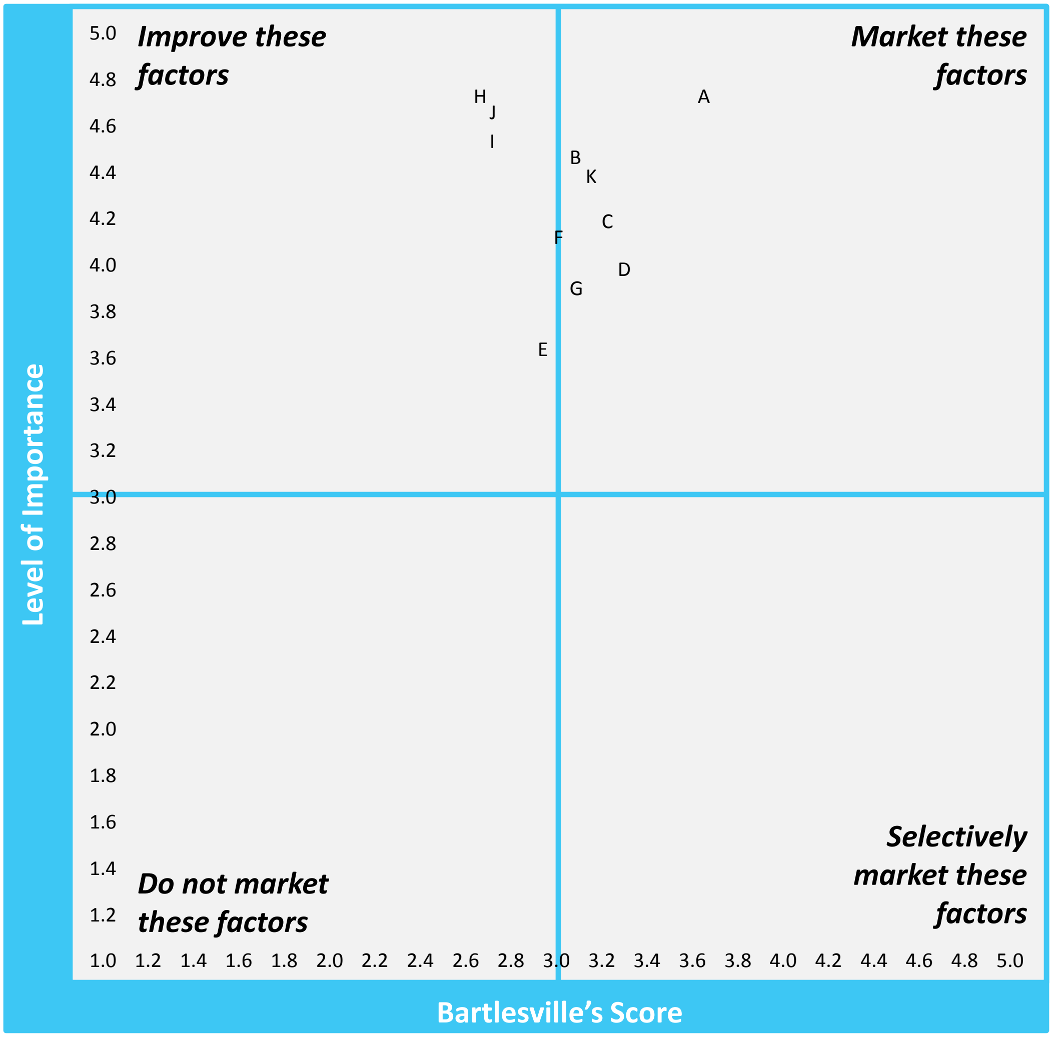
"In my opinion, there needs to be more money allotted to the Parks and Recreation department in Bartlesville. Pathfinder is great, but there should be some sort of running/walking track/trail/etc. that is in the open, where people feel safe working out if they are by themselves."

- Community Survey Response

Bartlesville Community Survey Education and Workforce Environment: Level of Importance vs. Bartlesville's Score

Education and Workforce Environment Factors

A	K-12 Educational Quality
B	K-12 Facilities
C	Continuing Education
D	4-Year Colleges
E	Post-Graduate Education
F	Workforce Training
G	Community Colleges
H	Job Availability
I	High Paying Jobs
J	Career Advancement Opportunities
K	Equal Opportunity



WORKFORCE AND EDUCATION ENVIRONMENT

Bartlesville's workforce and education environment is an key consideration for residents and is generally ranked as well above average.

- Bartlesville's most important and strongest factor is K-12 educational quality.
- Bartlesville's K-12 facilities are one of the most important factors, but are rated as only average.
- The weakest factors are job availability, career advancement opportunities, and high-paying jobs. These low rankings can be partially explained by a mismatch between the types of jobs available and the qualifications of the local workforce.

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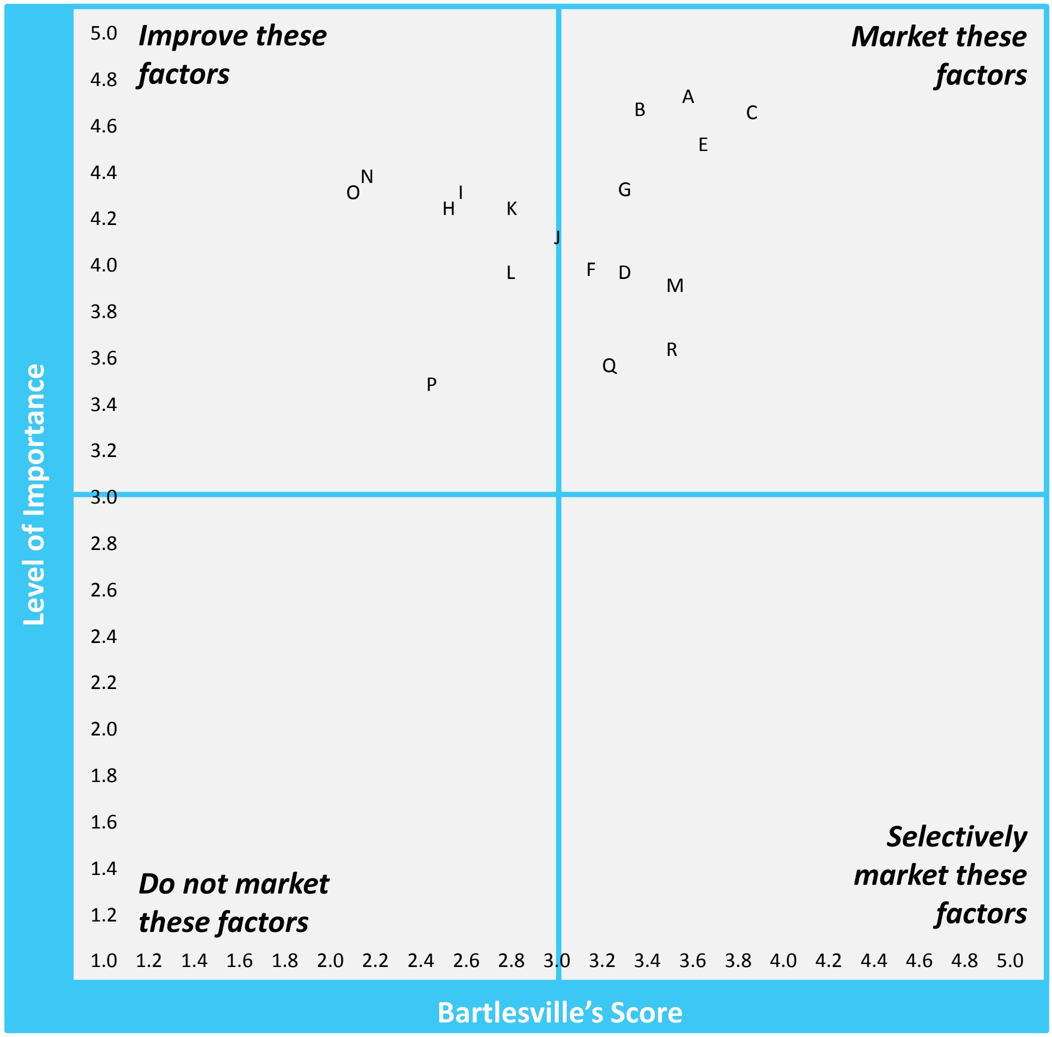
Bartlesville Community Survey Quality of Life:
Level of Importance vs. Bartlesville's Score

Quality of Life Factors

A	Low Crime
B	Good Healthcare
C	Family Environment
D	Pre-School / Daycare Options
E	Cost of Living
F	Diverse Housing Options
G	Affordable Housing
H	Entertainment
I	Recreation
J	Tax Burden
K	Youth Programs
L	Growth Management
M	Arts and Culture
N	Restaurants
O	Retail
P	Nightlife
Q	Climate
R	Historical Preservation



QUALITY OF LIFE

Bartlesville's quality of life is very important to residents. Most factors are rated as average or above average, but several quality of life factors are ranked as below average.

- Bartlesville's weakest quality of life factors are retail and restaurants, followed by nightlife, entertainment, and recreation.
- Bartlesville's strongest quality of life assets are family environment, cost of living, low crime, arts/culture, and historical preservation.

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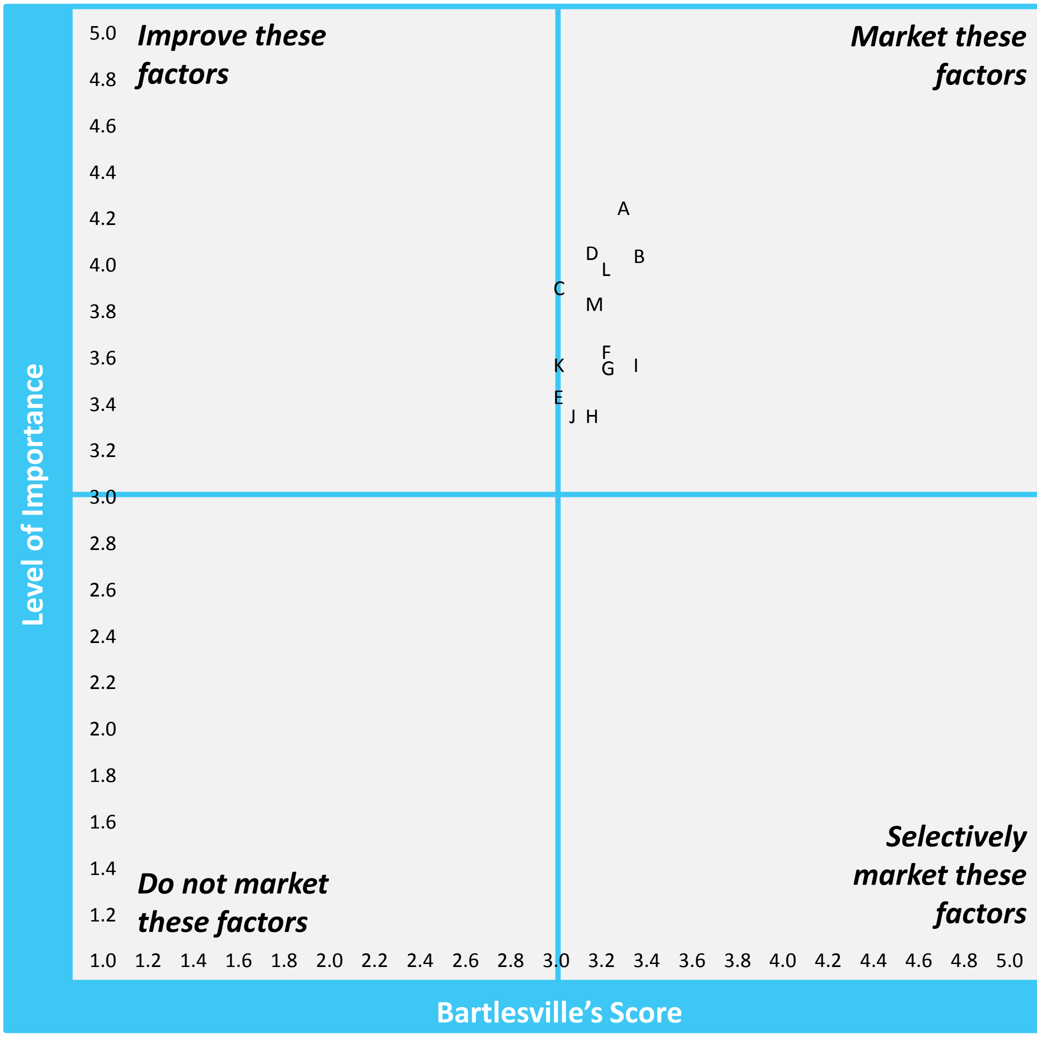
Bartlesville Community Survey Parks and Recreation:
Level of Importance vs. Bartlesville's Score

Parks and Recreation Factors

A	Parks
B	Hiking and Biking Trails
C	Swimming Pools / Aquatic Centers
D	Youth Sports Leagues
E	Adult Sports Leagues
F	Baseball
G	Soccer
H	Tennis
I	Golf
J	Track and Field Facilities
K	Hunting / Fishing Opportunities
L	Fitness Facilities
M	Fitness Classes

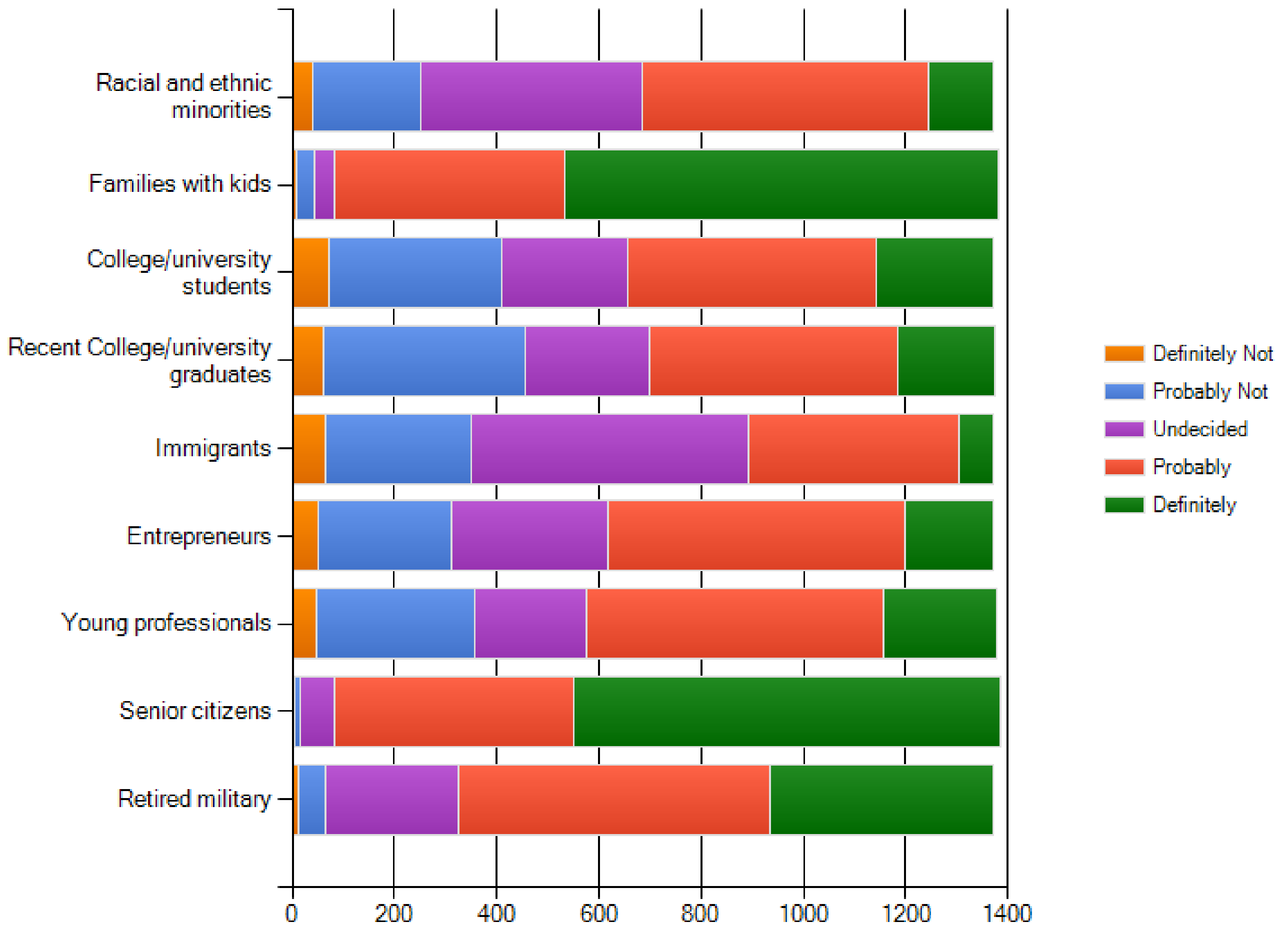


PARKS AND RECREATION

Bartlesville's parks and recreation are viewed as essential to residents, yet every factor is rated as either average or slightly above average.

- Bartlesville's weakest parks and recreation factors are swimming pools/aquatic centers, adult sports leagues, and hunting/fishing opportunities.
- Bartlesville's strongest parks and recreation factors include parks, hiking and biking trails, and golf.

Is Bartlesville a good place for:



COMMUNITY APPEAL TO DIVERSE POPULATION COHORTS

Bartlesville is viewed as being appealing to a wide-range of demographics.

- Bartlesville has the largest appeal to families with kids and senior citizens
- Bartlesville has a moderate appeal toward entrepreneurs and recent college/university graduates
- Bartlesville is viewed as being less appealing to racial and ethnic minorities and immigrants

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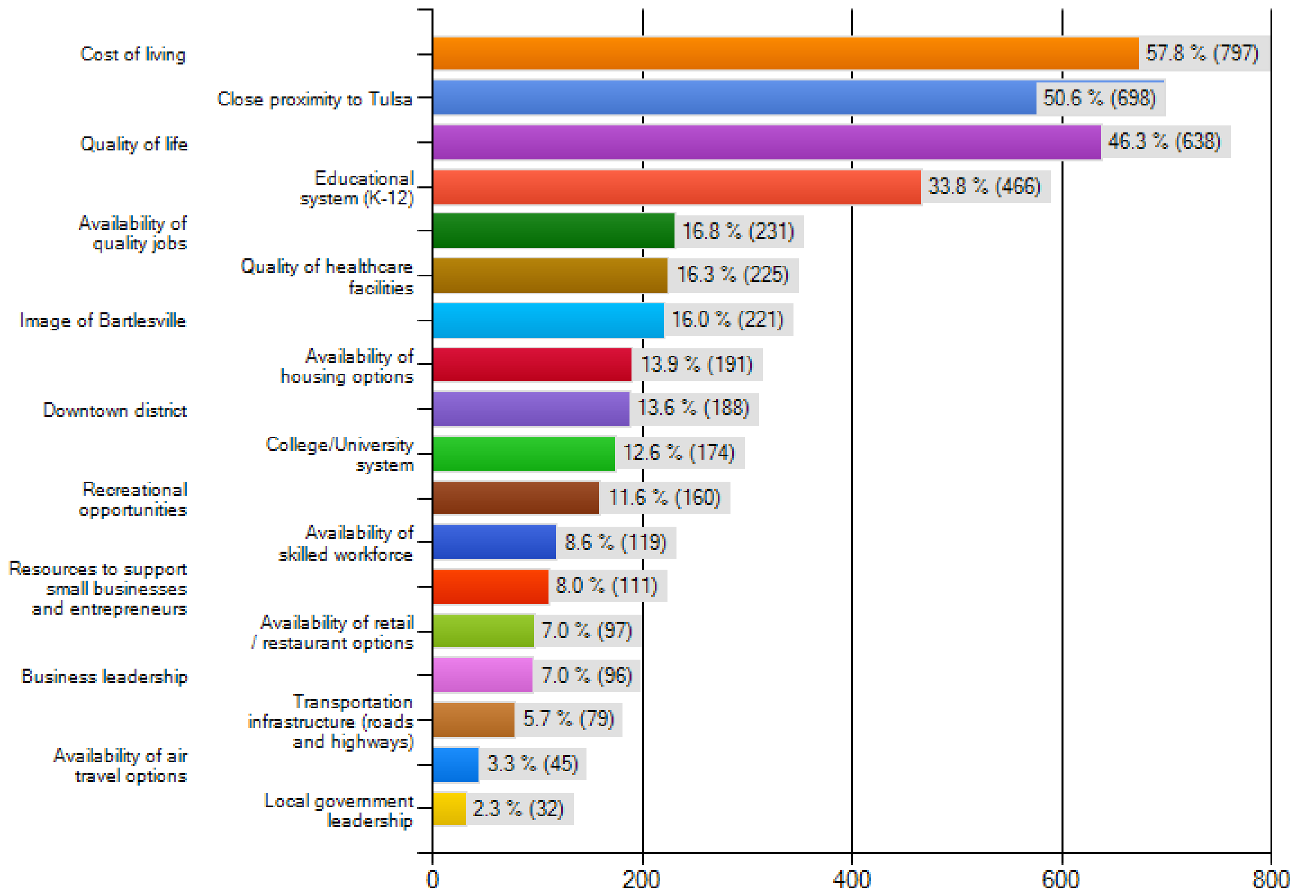
What are Bartlesville's greatest assets that can contribute to future or continued economic growth? (Choose up to three)



GREATEST ASSETS FOR ECONOMIC GROWTH

Measures of livability make up the top factors viewed as Bartlesville's greatest assets that contribute to continued economic growth.

- The cost of living, proximity to Tulsa, quality of life, and the K-12 Educational system were overwhelmingly seen as the top factors.
- Local government leadership, availability of air travel options, and transportation infrastructure rounded out the bottom half of factors.

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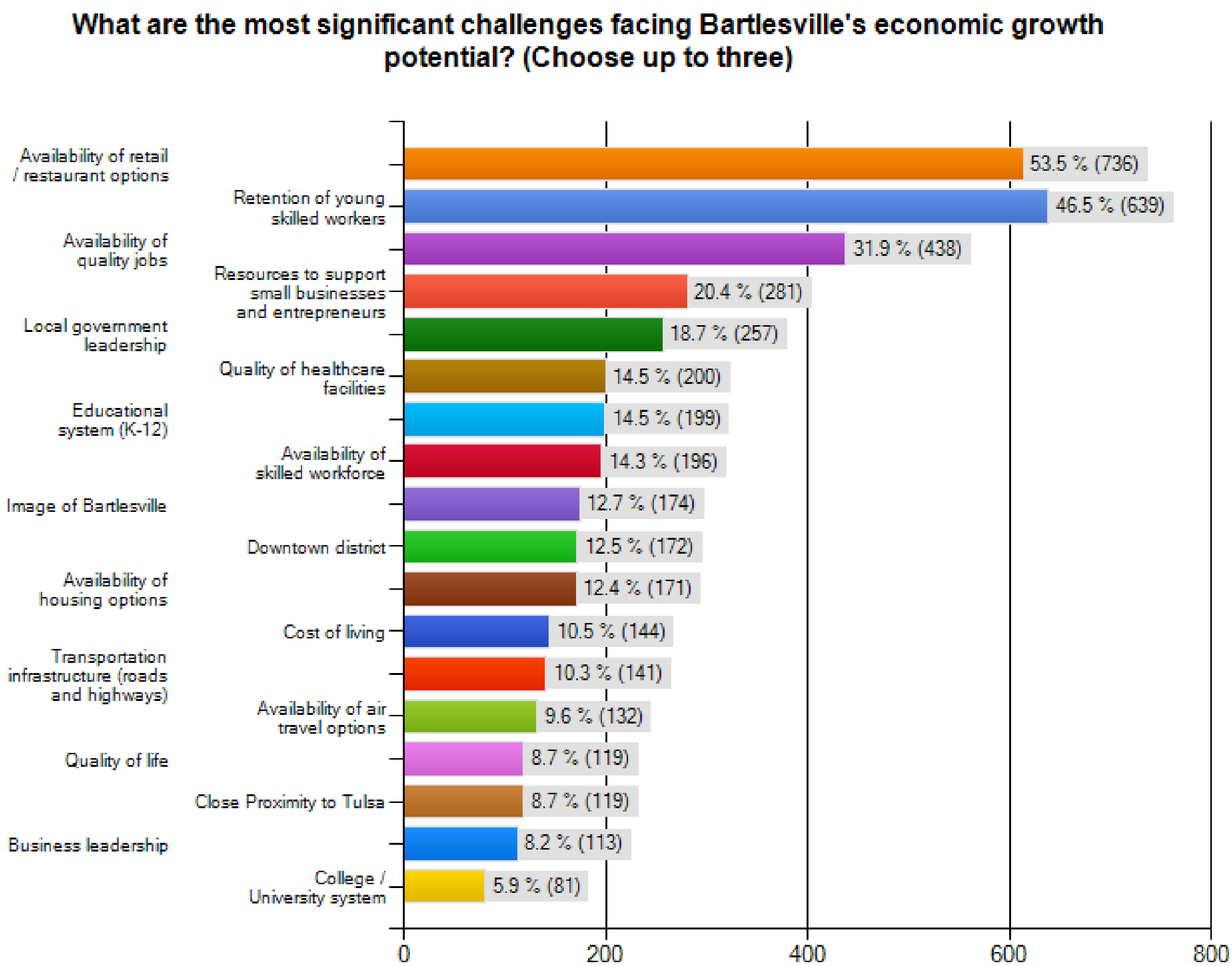

BIGGEST POTENTIAL BARRIERS TO ECONOMIC GROWTH

Retail/restaurant availability and attractiveness to young skilled workers are viewed as top barriers to Bartlesville's economic growth.

- The availability of retail/restaurant options, retaining young/skilled workers, and the availability of quality jobs are viewed as the top barriers to growth.
- The local college/university system, business leadership, and proximity to Tulsa were not seen as likely barriers to economic growth.

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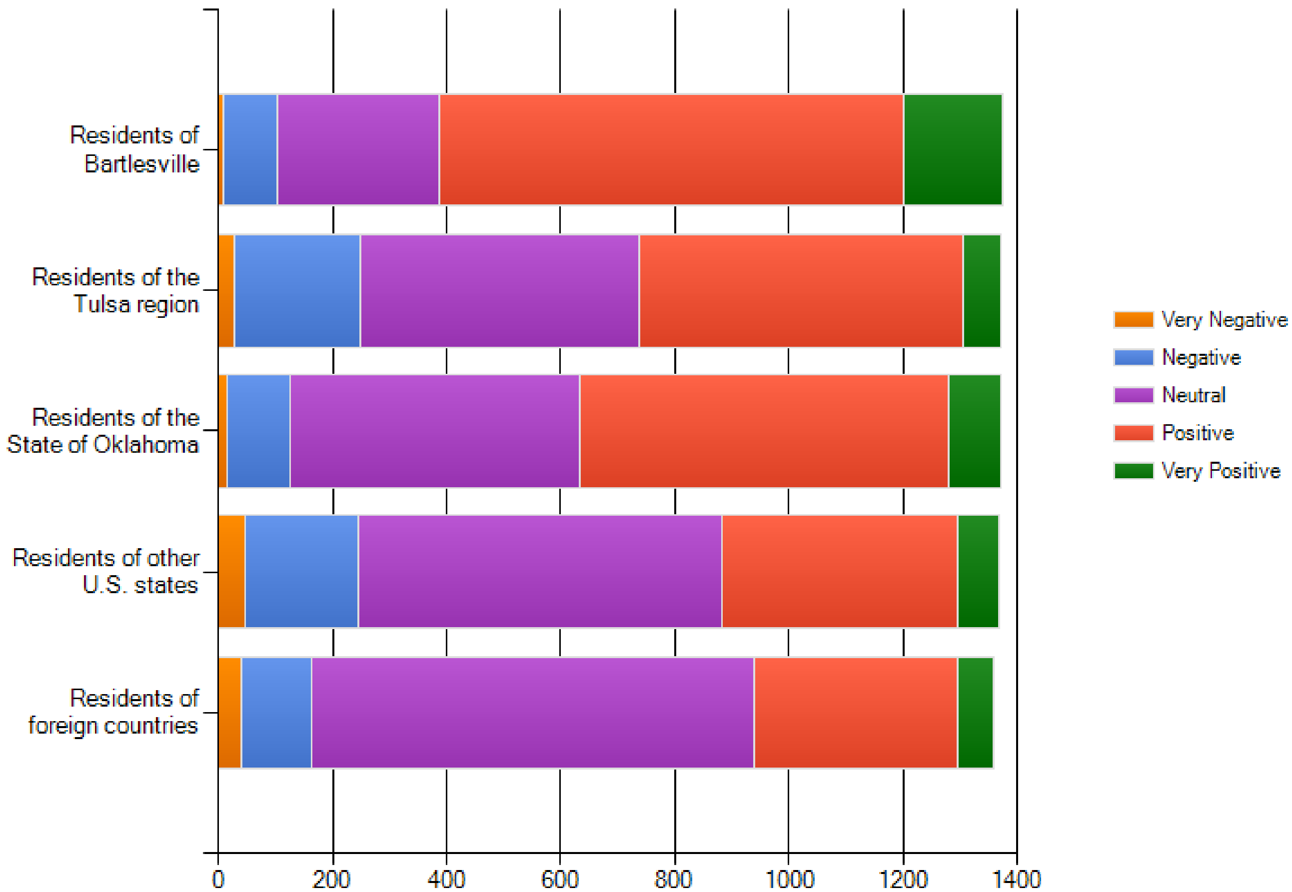
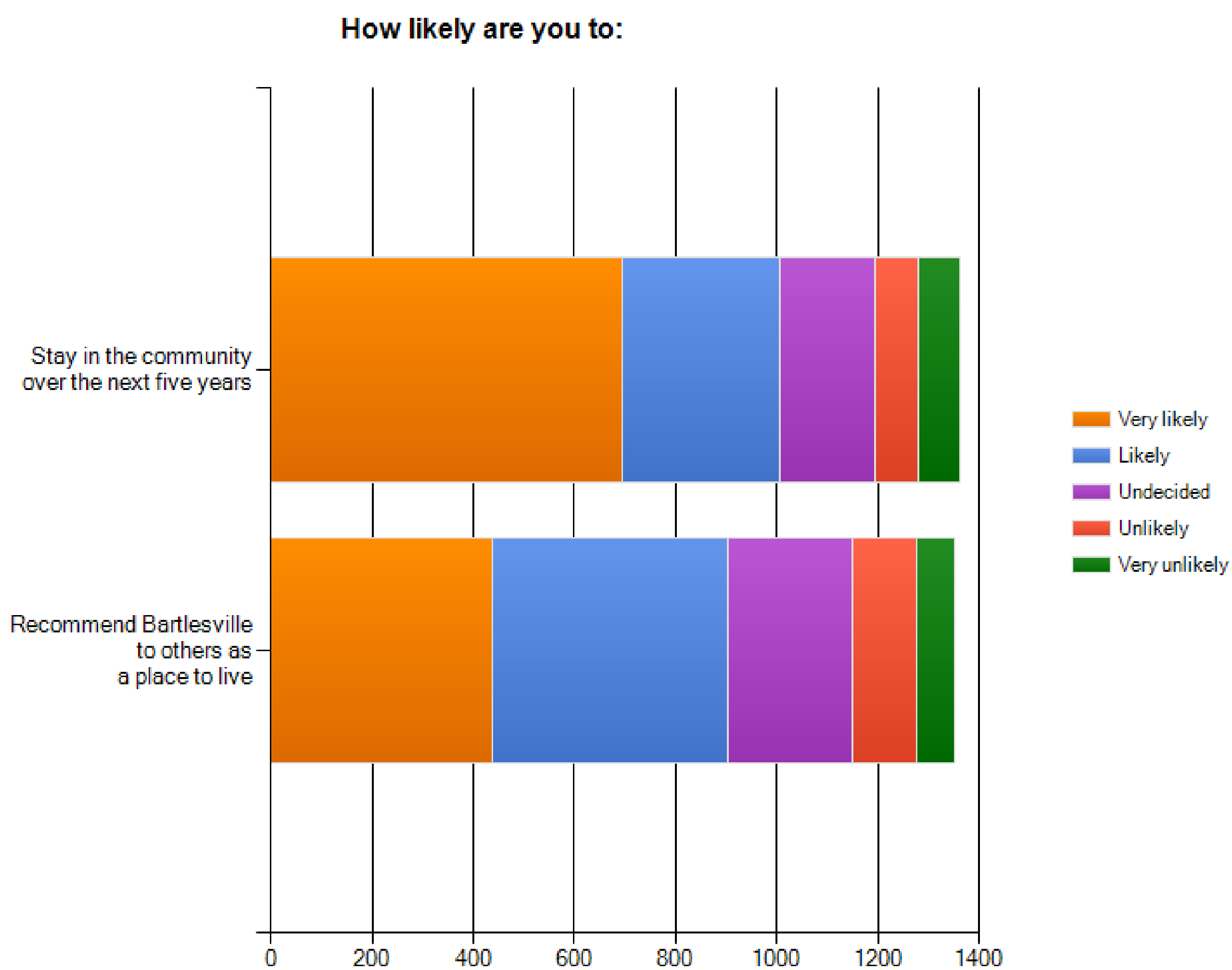
What type of image does Bartlesville project to people from the following areas?



BARTLESVILLE'S IMAGE

The image Bartlesville projects to other areas is viewed as mostly positive.

- Bartlesville's image is believed to be seen positively from residents of the city, region, and state of Oklahoma.
- Bartlesville's image is believed to be seen less positively outside the state of Oklahoma.



COMMUNITY PRIDE

Most residents of Bartlesville are decisive in their choice to stay in Bartlesville as well as recommend the city to others as a place to live.

- An overwhelming majority of the residents surveyed plan to stay in the community over the next five years as well as recommend the city to others as a place to live.
- Approximately one-quarter of residents surveyed do not plan to stay in Bartlesville over the next five years and would not recommend it as a place to live.

RETAIL OFFERINGS ASSESSMENT

KEY FINDINGS: RETAIL OFFERINGS

Retail is a market-driven industry, largely dependent upon the size, income/wealth levels, and spending habits of residents within a given market area. This does not mean that communities cannot take actions to improve their local retail offerings, but it does require that any actions taken to enhance a community's retail market must be strategically focused and must also leverage the community's unique local assets to achieve desirable outcomes.

Bartlesville's retail market is dominated by local businesses and a few national chain retailers. Due to Bartlesville's market size, limited population growth, and proximity to the City of Tulsa MSA and its suburbs, the city has only had minimal success in attracting the attention of most national chain retailers *(The following page details the site selection requirements for big-box retailers).* Thus, Bartlesville's retail market will only grow and thrive in the way that the city's residents desire if two outcomes happen:

- Bartlesville grows its population at a much faster rate, while continuing to expand its economic base through the creation of more "primary jobs"*
- Bartlesville creates new events and visitor destinations and more fully capitalizes on its existing tourist attractions/events to substantially increase the amount of visitor spending

"Better retail and restaurant options would keep more of the money in Bartlesville instead of Owasso or Tulsa."

- Community Survey Response

"We need to be able to utilize the awesome downtown district as a highlight (night-life) for the younger age groups (college and young adults)."

- Community Survey Response

*Primary jobs are jobs which produce goods and services in excess of what can be consumed by the local market.

Image Source: Bartlesville Regional Chamber of Commerce

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RETAIL SITE SELECTION CRITERIA

BIG-BOX AND NATIONAL CHAIN RETAIL/RESTAURANT SITE SELECTION CRITERIA

When considering a community for a retail development, big-box retail developers and national chain retailers/restaurants look at a variety of demographic and market data in order to determine whether or not to pursue a retail development within a community including, but not limited to:

- Population and households (new developments should be included in the growth projections)
- Average and median household incomes
- Per capita income
- Workday population
- Community's educational attainment (the trend of younger, more educated people locating to cities can improve this data)
- Median age
- Percent homeowners
- Percent families with children
- Lifestyle data profiling buying behavior of local residents
- Local construction trends in housing, commercial and industrial space
- Local employment trends
- Transportation data including traffic volume and parking
- Mix of existing retail, entertainment and services in the area
- Mix of residential, lodging, office and industrial space in the area
- Local and regional competition including location and square feet
- Build on downtown Bartlesville's role as a major retail/restaurant/entertainment destination.

Other basic market requirements that many big-box retailers and national chain retailers/restaurants often examine when considering a community include:

- Trade area with a minimum population of 100,000
- Trade area that has a minimum two- to five-mile radius
- Maximum car accessibility (by locating near the intersection of two thoroughfares)
- Minimal land costs
- Maximum visibility

For examples of site selection criteria for specific national chain retailers/restaurants, please see Appendix D: Retail Site Selection Criteria Samples.

Sources: MapInfo, Maryland Department of Planning, University of Wisconsin Center for Community Economic Development, Campaign for Sensible Growth, International Council of Shopping Centers, Metropolitan Mayors Caucus, Metropolitan Planning Council, Bank of America, General Growth Properties, Target Corporation

RETAIL OFFERINGS SWOT ANALYSIS

STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS

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Opportunities: Assets, events, or trends that offer Bartlesville the potential for enhanced retail offerings.

Threats: Obstacles, events or trends that, if not addressed effectively, could threaten the city's economic potential and its ability to improve retail opportunities for Bartlesville's residents.

RETAIL OFFERINGS IN BARTLESVILLE

STRENGTHS

- Community recognizes the need to address leakages of retail and restaurants
- Cultural events
- Strong employment base
- Educated population
- Presence of several corporate firms
- Redevelopment downtown
- Proximity to Tulsa

WEAKNESSES

- Sluggish population growth
- Few high-quality restaurants
- Lack of nightlife
- Significant loss of retail spending to Tulsa MSA
- Limited selection of food and services
- Weak enforcement of downtown parking regulations
- Limited downtown street activity
- Vacant retail space in downtown
- Lack of quality dining and retail
- Dilapidated retail and city infrastructure
- Lack of state/nationwide marketing
- Lack of communication between economic development entities
- Piece-meal approach to development
- Organized anti-growth/development groups
- Shrinking young professionals population
- Growing poverty
- Owasso envy

OPPORTUNITIES

- Modernizing cultural events
- Multi-sports complex
- Redeveloped downtown
- Demand for downtown housing
- Numerous downtown business opportunities include:
    - Brewpub/microbreweries
    - Wineries
    - Niche/specialty retail
    - Neighborhood grocery store
    - Additional “pop-up” restaurants to test concepts
    - Children’s museum
- Redevelopment of former hospital site in downtown
- Development of extended-stay hotel
- Kansas tourism and retail traffic
- Price Tower becoming a UNESCO site
- Redevelopment of Washington Park Mall

THREATS

- Fractious community
- Power struggle within community
- Anti-development mentality
- Growing elderly population
- Downtown redevelopment is made more difficult by fire code
- Development review is perceived as a barrier by many businesses
- Washington Park Mall is not a high quality mall and could deteriorate further
- Potential decreases in community activism/volunteerism due to “burn-out” and lack of progress
- ConocoPhillips/Philips 66 and Jane Phillips Medical Center cafeterias are a barrier to the development of additional privately-held restaurants

RETAIL LEAKAGE ANALYSIS

KEY FINDINGS: RETAIL LEAKAGE

Bartlesville currently loses an estimated $56 million per year in retail sales to surrounding communities, but makes up for some of this leakage through an estimated $40 million per year in retail sales gained from surrounding communities, for a net retail leakage of about $16 million per year. Bartlesville loses the largest amount of retail sales in the following retail sales categories:

- Motor vehicle and parts dealers ($9.4 million/year loss)
- Building materials, garden equipment, and supply stores ($6 million/year loss)
- Food and beverage stores ($13.9 million/year loss)
- Gasoline stations ($16.7 million/year loss)

In contrast, Bartlesville gains the largest amount of retail sales in the following retail sales categories:

- Health and personal care stores ($5.5 million/year gain)
- General merchandise stores ($11.7 million/year gain)
- Food services and drinking places ($21.2 million/year gain)

A complete Retail Leakage Analysis is shown on the following pages for the City of Bartlesville, Washington County, the Bartlesville Primary Trade Area, and the Bartlesville Secondary Trade Area. Retail leakage analyses for multiple additional geographic areas near Bartlesville are shown in Appendix C: Additional Retail Leakage Analyses.

"Access to Tulsa is both a help and a hindrance. We get visitors from the Tulsa area, but many Bartlesville residents think Tulsa is the best place to shop."

- Business Survey Response

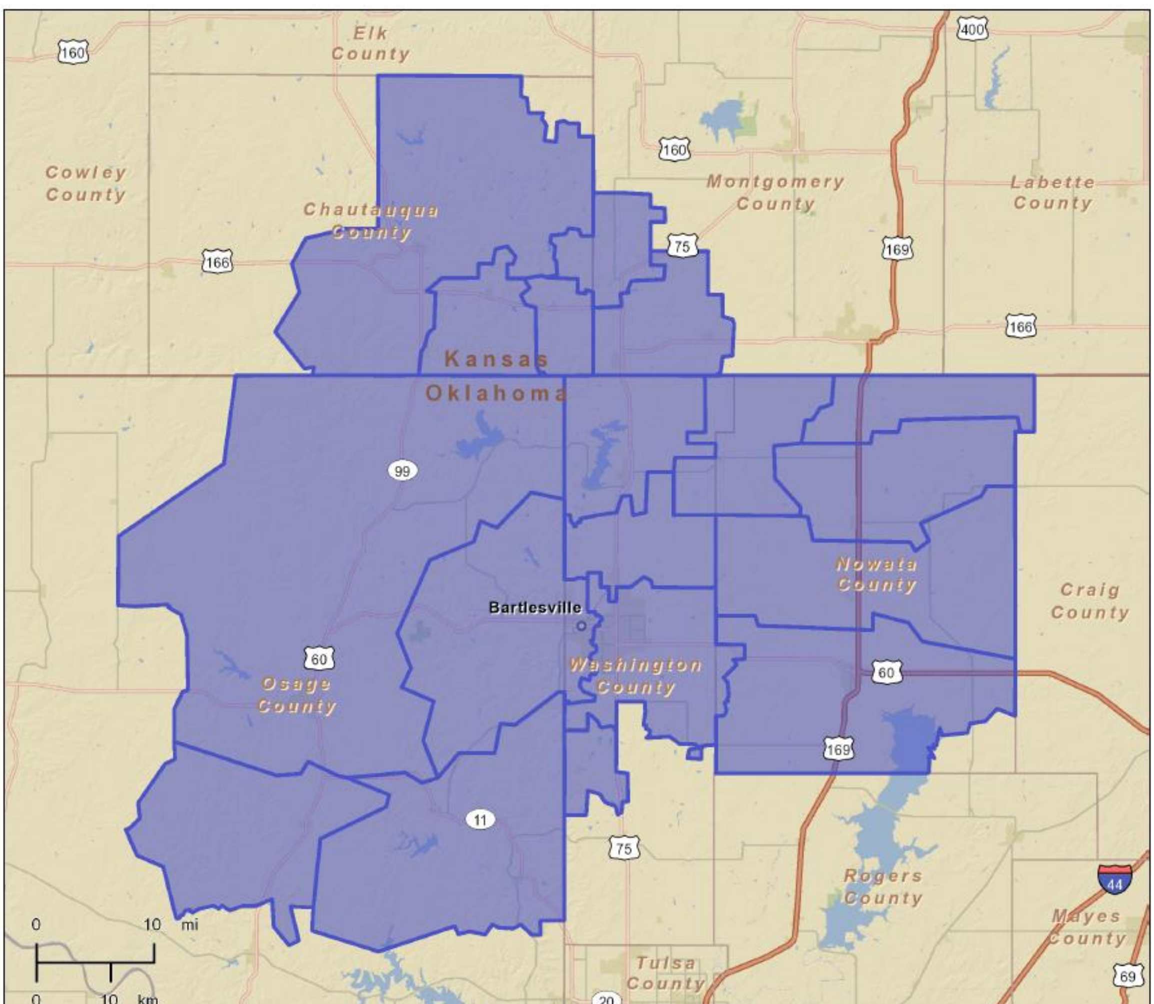
"The city needs to focus on families and recent college graduates. Sometimes there seems to be too much emphasis on the retired. We need facilities for our youth and fun nightlife activities for our young adults."

- Community Survey Response

BARTLESVILLE PRIMARY TRADE AREA

The Bartlesville Primary Trade Area is the zone where the City of Bartlesville has a strong geographic influence and serves as the principal center for the majority of shopping needs for residents within this zone. This trade area was delineated through an analysis of commuting patterns at the zip code level and the application of geographic theories (central place theory, Reilly's Law of Retail Gravitation) to Bartlesville and surrounding communities.

Bartlesville Primary Trade Area: Demographic and Income Snapshot, 2012	
Population	74,933
Households	30,762
Avg. Annual Household Income	$56,306
Households with Annual Income More than $100,000	4,107



Source: AngelouEconomics, ESRI

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City of Bartlesville, OK Retail Leakage Analysis				
Retail Sector	Retail Sales of Bartlesville Establishments (Supply-Retail Sales)	Retail Purchases of Bartlesville Residents (Demand-Retail Potential)	Retail Leakage	Leakage / Surplus Factor*
Total Retail Sales	$342,223,215	$358,336,854	-$16,113,639	-4.5%
Motor Vehicle & Parts Dealers	$62,356,958	$71,758,859	-$9,401,901	-13.1%
Automobile Dealers	$54,817,343	$61,832,398	-$7,015,055	-11.3%
Other Motor Vehicle Dealers	$2,192,216	$5,477,216	-$3,285,000	-60.0%
Auto Parts, Accessories, and Tire Stores	$5,347,399	$4,449,245	$898,154	20.2%
Furniture & Home Furnishings Stores	$4,127,695	$6,677,458	-$2,549,763	-38.2%
Furniture Stores	$2,764,427	$4,879,746	-$2,115,319	-43.3%
Home Furnishings Stores	$1,363,268	$1,797,712	-$434,444	-24.2%
Electronics & Appliance Stores	$4,073,460	$6,272,194	-$2,198,734	-35.1%
Bldg Materials, Garden Equip. & Supply Stores	$5,617,618	$11,573,446	-$5,955,828	-51.5%
Building Material and Supplies Dealers	$4,841,509	$10,615,710	-$5,774,201	-54.4%
Lawn and Garden Equipment and Supplies Stores	$776,109	$957,736	-$181,627	-19.0%
Food & Beverage Stores	$33,841,372	$47,764,215	-$13,922,843	-29.1%
Grocery Stores	$31,997,582	$44,587,404	-$12,589,822	-28.2%
Specialty Food Stores	$258,437	$446,281	-$187,844	-42.1%
Beer, Wine, and Liquor Stores	$1,585,353	$2,730,530	-$1,145,177	-41.9%
Health & Personal Care Stores	$18,566,720	$13,115,378	$5,451,342	41.6%
Gasoline Stations	$39,953,253	$56,621,758	-$16,668,505	-29.4%
Clothing and Clothing Accessories Stores	$7,751,881	$7,187,652	$564,229	7.8%
Clothing Stores	$5,231,244	$4,818,082	$413,162	8.6%
Shoe Stores	$859,984	$797,886	$62,098	7.8%
Jewelry, Luggage, and Leather Goods Stores	$1,660,653	$1,571,684	$88,969	5.7%
Sporting Goods, Hobby, Book, and Music Stores	$3,248,582	$3,783,460	-$534,878	-14.1%
Sporting Goods/Hobby/Musical Instrument Stores	$1,299,157	$1,436,782	-$137,625	-9.6%
Book, Periodical, and Music Stores	$1,949,425	$2,346,678	-$397,253	-16.9%
General Merchandise Stores	$83,742,081	$72,026,661	$11,715,420	16.3%
Department Stores Excluding Leased Depts.	$52,515,662	$45,130,888	$7,384,774	16.4%
Other General Merchandise Stores	$31,226,419	$26,895,773	$4,330,646	16.1%
Miscellaneous Store Retailers	$5,547,215	$6,186,129	-$638,914	-10.3%
Florists	$705,285	$573,531	$131,754	23.0%
Office Supplies, Stationery & Gift Stores	$2,265,781	$2,339,185	-$73,404	-3.1%
Used Merchandise Stores	$367,016	$582,589	-$215,573	-37.0%
Other Miscellaneous Store Retailers	$2,209,133	$2,690,824	-$481,691	-17.9%
Nonstore Retailers	$105,957	$3,288,507	-$3,182,550	-96.8%
Electronic Shopping & Mail-Order Houses	$0	$1,399,456	-$1,399,456	-100.0%
Vending Machine Operators	$105,957	$147,060	-$41,103	-27.9%
Direct Selling Establishments	$0	$1,741,991	-$1,741,991	-100.0%
Food Services & Drinking Places	$73,290,423	$52,081,137	$21,209,286	40.7%
Full-Service Restaurants	$26,688,809	$21,149,106	$5,539,703	26.2%
Limited-Service Eating Places	$44,285,538	$29,401,937	$14,883,601	50.6%
Special Food Services	$1,696,482	$798,929	$897,553	112.3%
Drinking Places - Alcoholic Beverages	$619,594	$731,165	-$111,571	-15.3%

* Leakage factor is defined as the percentage less than the demand being supplied within a given retail category. For example, a leakage of 50% indicates that only half of the demand is currently being supplied. Surplus factor is defined as the percentage greater than the demand being supplied within a given retail category. A surplus of 50% indicates that the supply exceeds the demand by 50%.

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Washington County Retail Leakage Analysis

Retail Sector	Retail Sales of Washington County Establishments (Supply-Retail Sales)	Retail Purchases of Washington County Residents (Demand-Retail Potential)	Retail Leakage	Leakage / Surplus Factor*
Total Retail Sales	$410,529,697	$486,163,607	-$75,633,910	-15.6%
Motor Vehicle & Parts Dealers	$84,883,398	$98,146,518	-$13,263,120	-13.5%
Automobile Dealers	$77,020,670	$84,316,663	-$7,295,993	-8.7%
Other Motor Vehicle Dealers	$2,192,216	$7,792,002	-$5,599,786	-71.9%
Auto Parts, Accessories, and Tire Stores	$5,670,512	$6,037,853	-$367,341	-6.1%
Furniture & Home Furnishings Stores	$5,525,020	$9,159,203	-$3,634,183	-39.7%
Furniture Stores	$3,577,494	$6,678,606	-$3,101,112	-46.4%
Home Furnishings Stores	$1,947,526	$2,480,597	-$533,071	-21.5%
Electronics & Appliance Stores	$4,154,929	$8,514,857	-$4,359,928	-51.2%
Bldg Materials, Garden Equip. & Supply Stores	$7,384,529	$16,242,767	-$8,858,238	-54.5%
Building Material and Supplies Dealers	$6,425,806	$14,898,199	-$8,472,393	-56.9%
Lawn and Garden Equipment and Supplies Stores	$958,723	$1,344,568	-$385,845	-28.7%
Food & Beverage Stores	$40,853,136	$64,260,792	-$23,407,656	-36.4%
Grocery Stores	$38,503,341	$59,986,224	-$21,482,883	-35.8%
Specialty Food Stores	$368,104	$600,173	-$232,069	-38.7%
Beer, Wine, and Liquor Stores	$1,981,691	$3,674,395	-$1,692,704	-46.1%
Health & Personal Care Stores	$19,284,770	$17,780,300	$1,504,470	8.5%
Gasoline Stations	$58,028,006	$76,455,135	-$18,427,129	-24.1%
Clothing and Clothing Accessories Stores	$8,469,092	$9,715,343	-$1,246,251	-12.8%
Clothing Stores	$5,688,978	$6,496,849	-$807,871	-12.4%
Shoe Stores	$859,984	$1,069,675	-$209,691	-19.6%
Jewelry, Luggage, and Leather Goods Stores	$1,920,130	$2,148,819	-$228,689	-10.6%
Sporting Goods, Hobby, Book, and Music Stores	$3,520,849	$5,065,473	-$1,544,624	-30.5%
Sporting Goods/Hobby/Musical Instrument Stores	$1,571,424	$1,962,897	-$391,473	-19.9%
Book, Periodical, and Music Stores	$1,949,425	$3,102,576	-$1,153,151	-37.2%
General Merchandise Stores	$93,022,221	$97,643,265	-$4,621,044	-4.7%
Department Stores Excluding Leased Depts.	$52,515,662	$61,296,666	-$8,781,004	-14.3%
Other General Merchandise Stores	$40,506,559	$36,346,599	$4,159,960	11.4%
Miscellaneous Store Retailers	$6,286,638	$8,376,739	-$2,090,101	-25.0%
Florists	$759,538	$807,873	-$48,335	-6.0%
Office Supplies, Stationery & Gift Stores	$2,407,393	$3,194,558	-$787,165	-24.6%
Used Merchandise Stores	$534,550	$789,741	-$255,191	-32.3%
Other Miscellaneous Store Retailers	$2,585,157	$3,584,567	-$999,410	-27.9%
Nonstore Retailers	$105,957	$4,534,677	-$4,428,720	-97.7%
Electronic Shopping & Mail-Order Houses	$0	$1,903,697	-$1,903,697	-100.0%
Vending Machine Operators	$105,957	$197,923	-$91,966	-46.5%
Direct Selling Establishments	$0	$2,433,057	-$2,433,057	-100.0%
Food Services & Drinking Places	$79,011,152	$70,268,538	$8,742,614	12.4%
Full-Service Restaurants	$29,683,361	$28,507,937	$1,175,424	4.1%
Limited-Service Eating Places	$47,002,692	$39,725,623	$7,277,069	18.3%
Special Food Services	$1,696,482	$1,078,593	$617,889	57.3%
Drinking Places - Alcoholic Beverages	$628,617	$956,385	-$327,768	-34.3%

* Leakage factor is defined as the percentage less than the demand being supplied within a given retail category. For example, a leakage of 50% indicates that only half of the demand is currently being supplied. Surplus factor is defined as the percentage greater than the demand being supplied within a given retail category. A surplus of 50% indicates that the supply exceeds the demand by 50%.

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Bartlesville Primary Trade Area Retail Leakage Analysis

Retail Sector	Retail Sales of Bartlesville Primary Trade Area Establishments (Supply-Retail Sales)	Retail Purchases of Bartlesville Primary Trade Area Residents (Demand-Retail Potential)	Retail Leakage	Leakage / Surplus Factor*
Total Retail Sales	$519,148,882	$670,425,261	-$151,276,379	-22.6%
Motor Vehicle & Parts Dealers	$89,581,893	$135,386,028	-$45,804,135	-33.8%
Automobile Dealers	$80,339,893	$115,543,918	-$35,204,025	-30.5%
Other Motor Vehicle Dealers	$2,192,216	$11,451,620	-$9,259,404	-80.9%
Auto Parts, Accessories, and Tire Stores	$7,049,784	$8,390,490	-$1,340,706	-16.0%
Furniture & Home Furnishings Stores	$5,611,882	$11,657,562	-$6,045,680	-51.9%
Furniture Stores	$3,577,494	$8,534,721	-$4,957,227	-58.1%
Home Furnishings Stores	$2,034,388	$3,122,841	-$1,088,453	-34.9%
Electronics & Appliance Stores	$4,372,947	$10,945,014	-$6,572,067	-60.0%
Bldg Materials, Garden Equip. & Supply Stores	$8,431,791	$21,856,027	-$13,424,236	-61.4%
Building Material and Supplies Dealers	$7,418,174	$19,485,966	-$12,067,792	-61.9%
Lawn and Garden Equipment and Supplies Stores	$1,013,617	$2,370,061	-$1,356,444	-57.2%
Food & Beverage Stores	$58,647,577	$78,003,698	-$19,356,121	-24.8%
Grocery Stores	$54,571,679	$72,218,567	-$17,646,888	-24.4%
Specialty Food Stores	$611,885	$1,126,811	-$514,926	-45.7%
Beer, Wine, and Liquor Stores	$3,464,013	$4,658,320	-$1,194,307	-25.6%
Health & Personal Care Stores	$20,794,440	$20,143,331	$651,109	3.2%
Gasoline Stations	$81,273,269	$113,933,835	-$32,660,566	-28.7%
Clothing and Clothing Accessories Stores	$9,025,667	$10,432,320	-$1,406,653	-13.5%
Clothing Stores	$6,101,717	$7,209,941	-$1,108,224	-15.4%
Shoe Stores	$1,003,820	$1,399,494	-$395,674	-28.3%
Jewelry, Luggage, and Leather Goods Stores	$1,920,130	$1,822,885	$97,245	5.3%
Sporting Goods, Hobby, Book, and Music Stores	$3,658,705	$4,605,823	-$947,118	-20.6%
Sporting Goods/Hobby/Musical Instrument Stores	$1,709,280	$2,262,333	-$553,053	-24.4%
Book, Periodical, and Music Stores	$1,949,425	$2,343,490	-$394,065	-16.8%
General Merchandise Stores	$136,835,159	$150,925,988	-$14,090,829	-9.3%
Department Stores Excluding Leased Depts.	$52,515,662	$68,841,715	-$16,326,053	-23.7%
Other General Merchandise Stores	$84,319,497	$82,084,273	$2,235,224	2.7%
Miscellaneous Store Retailers	$7,899,935	$11,983,923	-$4,083,988	-34.1%
Florists	$996,212	$1,072,733	-$76,521	-7.1%
Office Supplies, Stationery & Gift Stores	$3,132,877	$4,990,619	-$1,857,742	-37.2%
Used Merchandise Stores	$668,531	$842,975	-$174,444	-20.7%
Other Miscellaneous Store Retailers	$3,102,315	$5,077,596	-$1,975,281	-38.9%
Nonstore Retailers	$1,983,318	$9,303,029	-$7,319,711	-78.7%
Electronic Shopping & Mail-Order Houses	$1,782,844	$4,161,094	-$2,378,250	-57.2%
Vending Machine Operators	$200,474	$556,598	-$356,124	-64.0%
Direct Selling Establishments	$0	$4,585,337	-$4,585,337	-100.0%
Food Services & Drinking Places	$91,032,299	$91,248,683	-$216,384	-0.2%
Full-Service Restaurants	$37,241,272	$42,727,259	-$5,485,987	-12.8%
Limited-Service Eating Places	$50,985,599	$44,564,917	$6,420,682	14.4%
Special Food Services	$1,696,482	$2,614,630	-$918,148	-35.1%
Drinking Places - Alcoholic Beverages	$1,108,946	$1,341,877	-$232,931	-17.4%

* Leakage factor is defined as the percentage less than the demand being supplied within a given retail category. For example, a leakage of 50% indicates that only half of the demand is currently being supplied. Surplus factor is defined as the percentage greater than the demand being supplied within a given retail category. A surplus of 50% indicates that the supply exceeds the demand by 50%.

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RETAIL OFFERINGS: BUSINESS SURVEY

BUSINESS SURVEY SUMMARY

As part of the data collection process, an online survey was developed to glean insight from Bartlesville retail and restaurant business owners on topics related to the Bartlesville retail market and, to a lesser extent, quality of life and economic development. The business survey was completed by 23 retail and restaurant business owners.

The survey remained online for a three-week period from November 9, 2012 through November 30, 2012. The following pages provide a detailed breakdown of results from the survey. The following pages provide a summary of the business survey results related to Bartlesville's retail offerings. A detailed breakdown of results from the survey can be found in Appendix B: Detailed Business Survey Results.

BARTLESVILLE'S RETAIL OFFERINGS: DEFINING THEMES

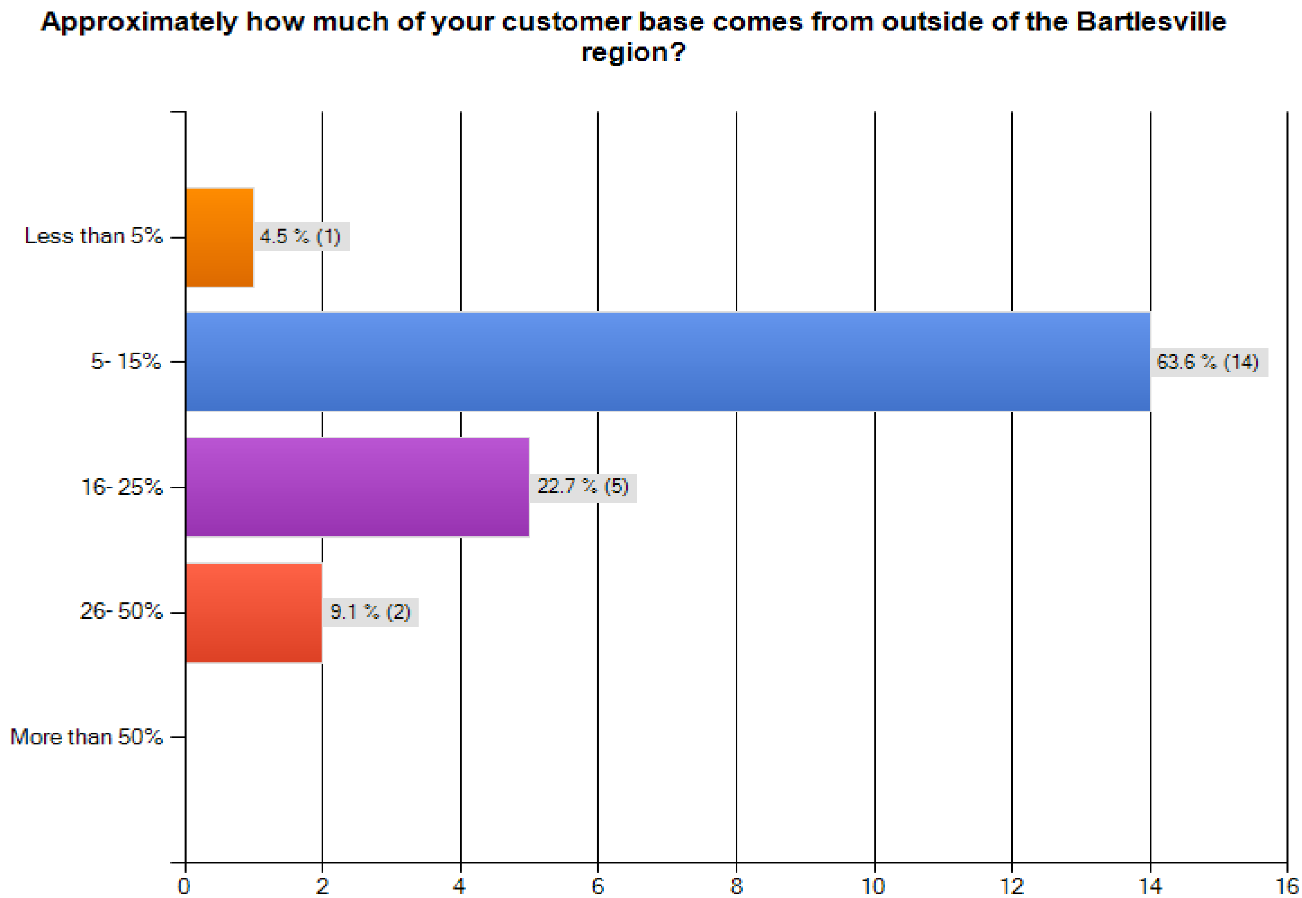
A thorough analysis of the retail topics in the business survey results shed light on several recurring themes.

- Downtown Bartlesville is widely recognized by local retailers as a unique asset that can further contribute to the success of their business.
- Bartlesville retailers focus on the female, and age 45-64 consumer segments.
- Tourist and visitor spending from outside of the region is not a major source of revenue for most Bartlesville retailers.
- Bartlesville's workforce quality is an area of concern for local retailers.
- There is a clear consensus that the post-holiday months (January/February) are the slowest months for retail business.

"Let's get it done!"

- Business Survey Response

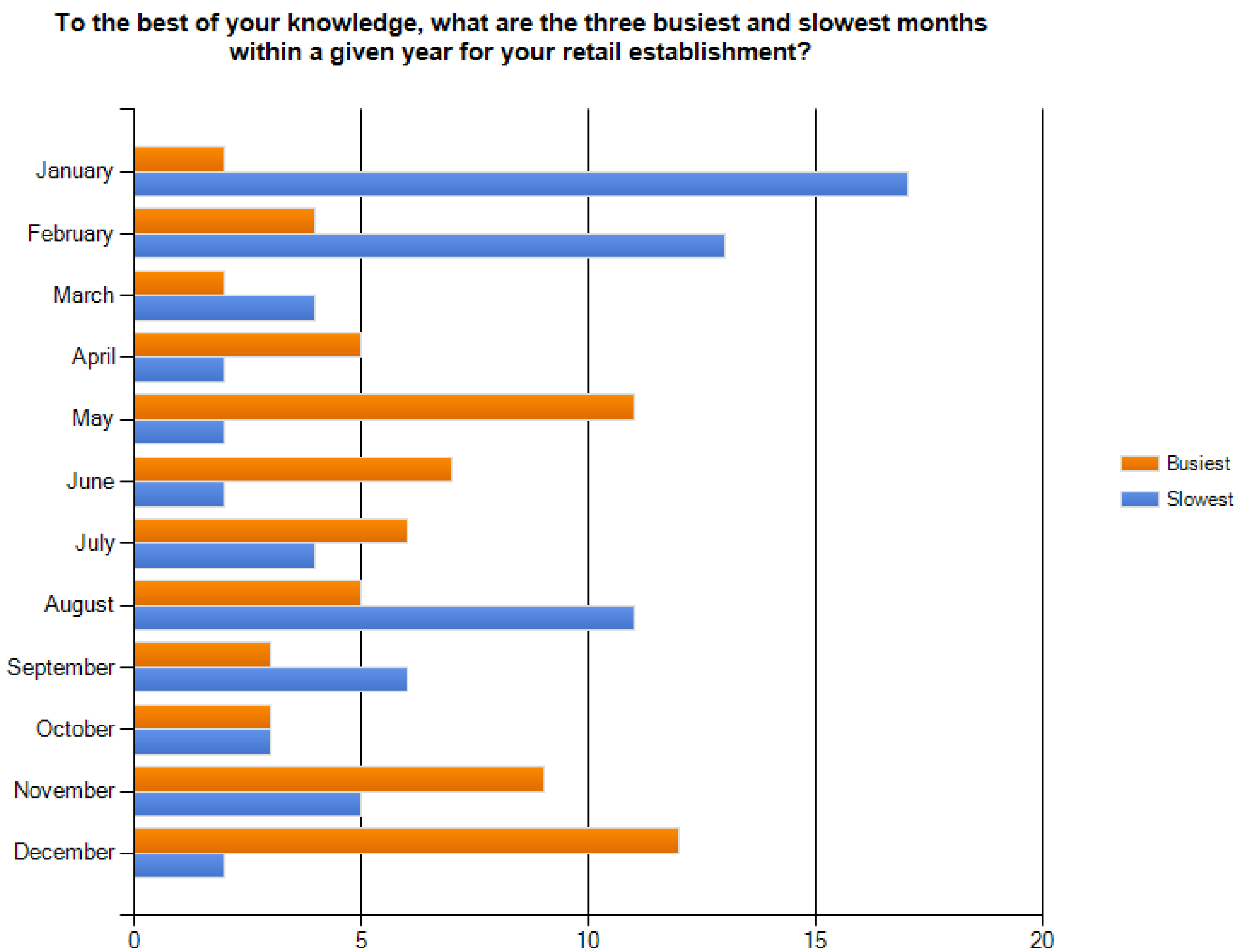
"Position Bartlesville as a progressive, growing and positive community with a high quality of life to help attract and keep the best people."
- Business Survey Response



RETAIL CUSTOMERS FROM OUTSIDE OF REGION

The customer base from outside the region currently has a minimal effect on Bartlesville businesses.

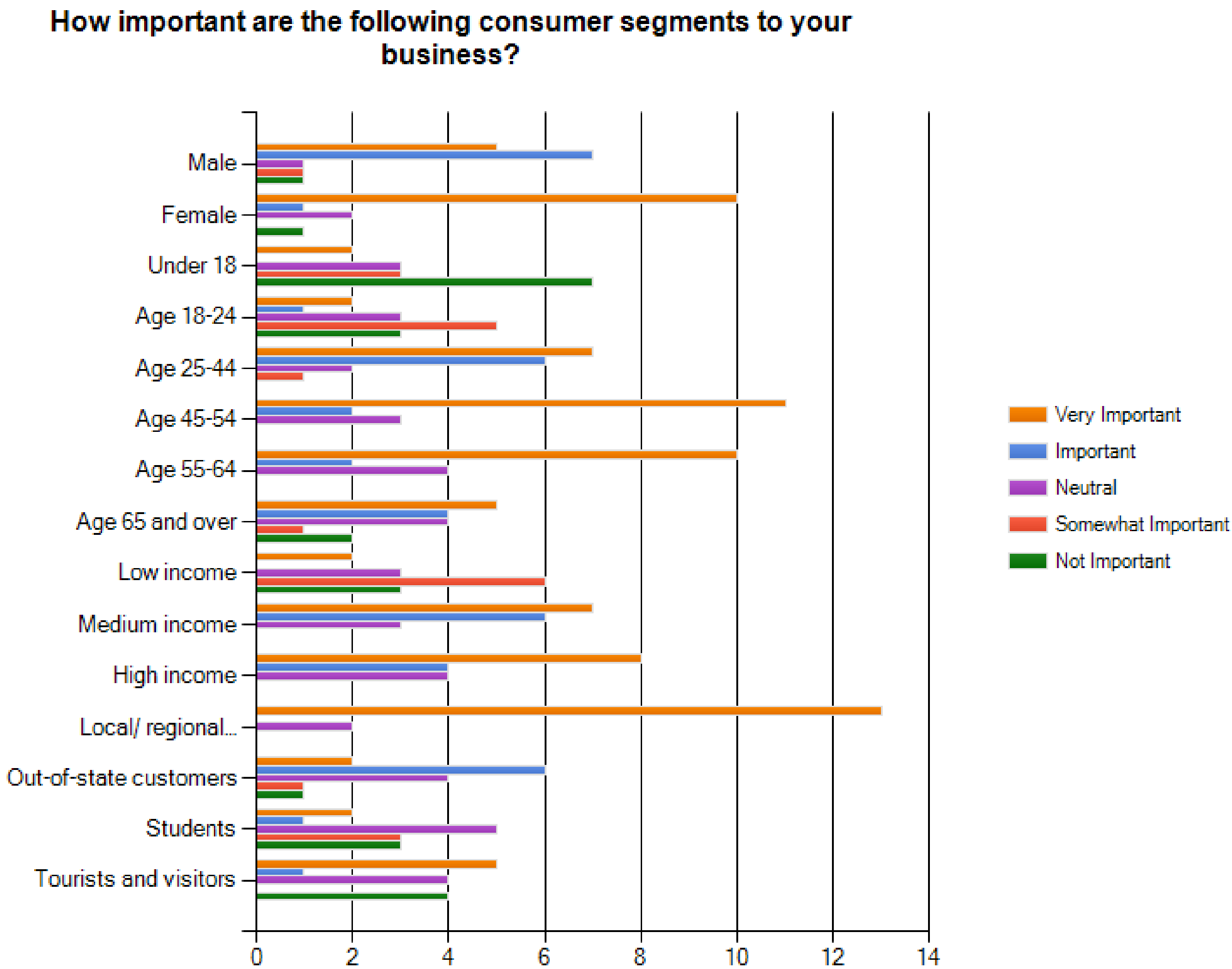
- The majority of businesses surveyed said 15 percent or less of their customer base comes from outside the region.
- Only two businesses surveyed have between 26 and 50 percent of their customer base outside the region.



BUSIEST AND SLOWEST MONTHS FOR RETAIL BUSINESS

Retail foot traffic in Bartlesville flows in tandem with the holiday season.

- The busiest retail months occur during the months of November and December, closely followed by the early summer months.
- The post-holiday months of January and February make up some of the slowest times for retail establishments.



MOST IMPORTANT CONSUMER SEGMENTS

Females and consumers between age 45 and 64 make up important consumer segments for Bartlesville, but none as important as local/regional customers.

- The local/regional consumer segment was identified as the most important for Bartlesville businesses.
- The 45 to 64 age range and female population are also important consumer segments for local businesses.
- Tourists and visitors were not identified as an important consumer segment by most businesses.

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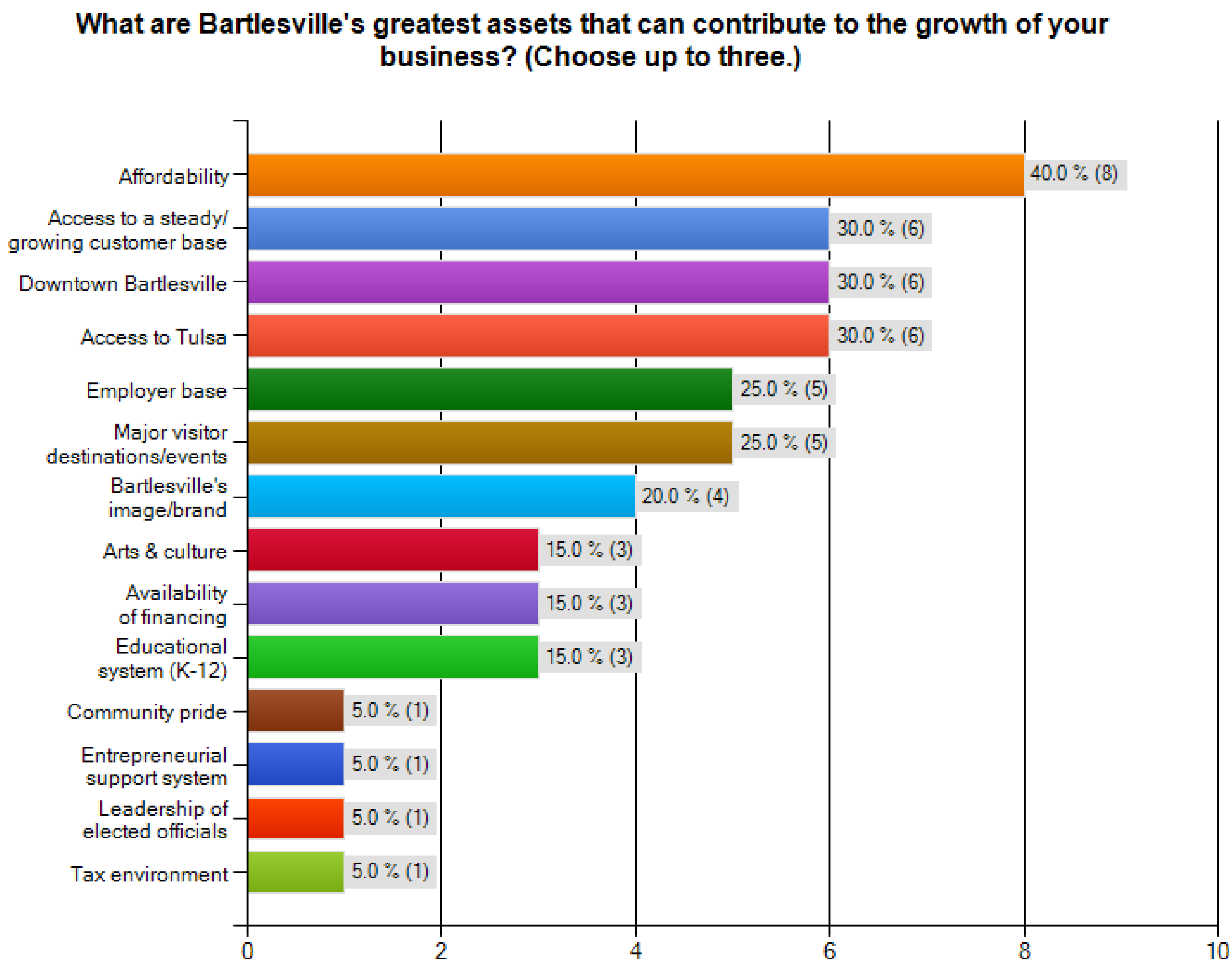

GREATEST ASSETS FOR RETAIL BUSINESS GROWTH

Bartlesville's geography lends a hand in producing some of its greatest assets for retail growth.

- Being close to Tulsa, but with more affordability, was one of the top assets named for retail growth in Bartlesville.
- The tax environment and leadership of elected officials were not considered assets that could be leverage for retail growth.

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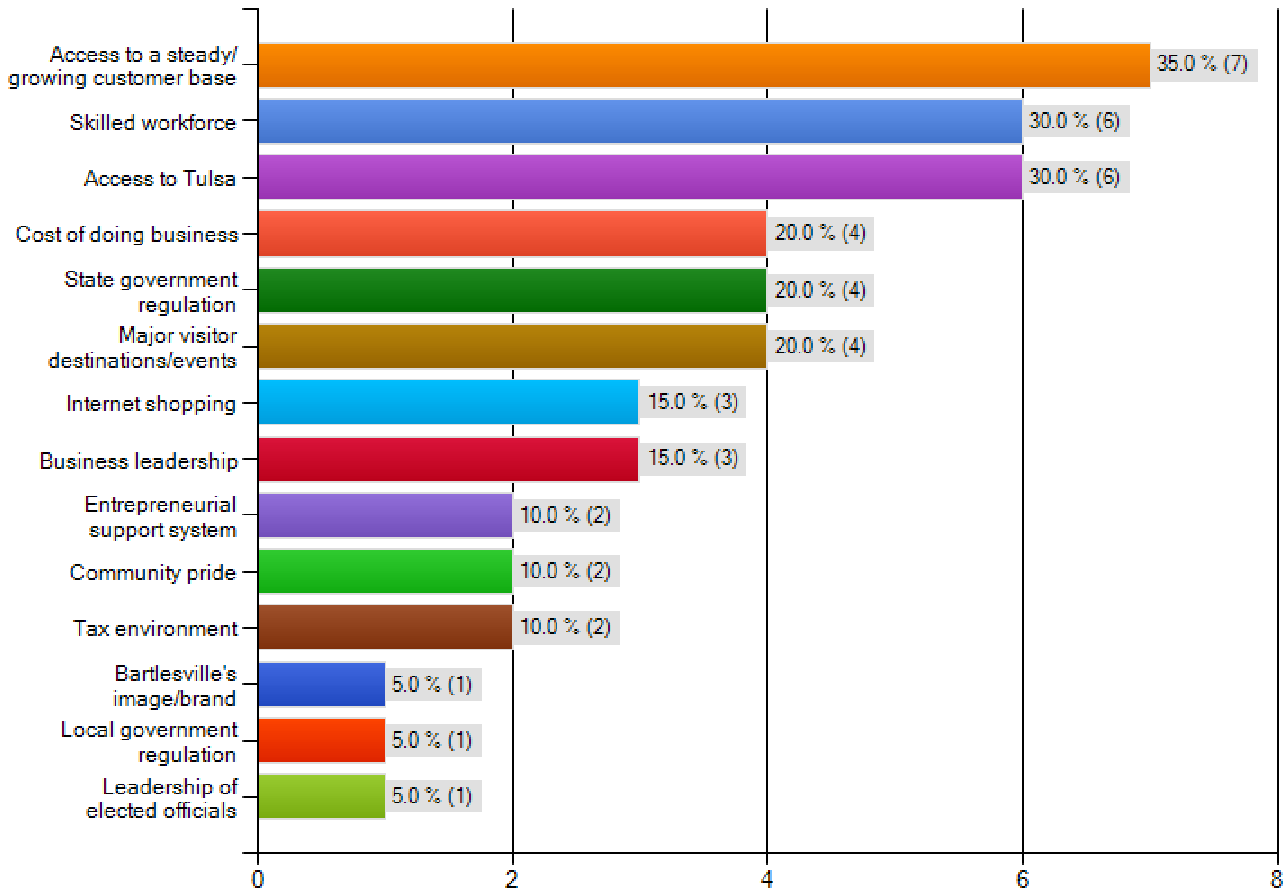
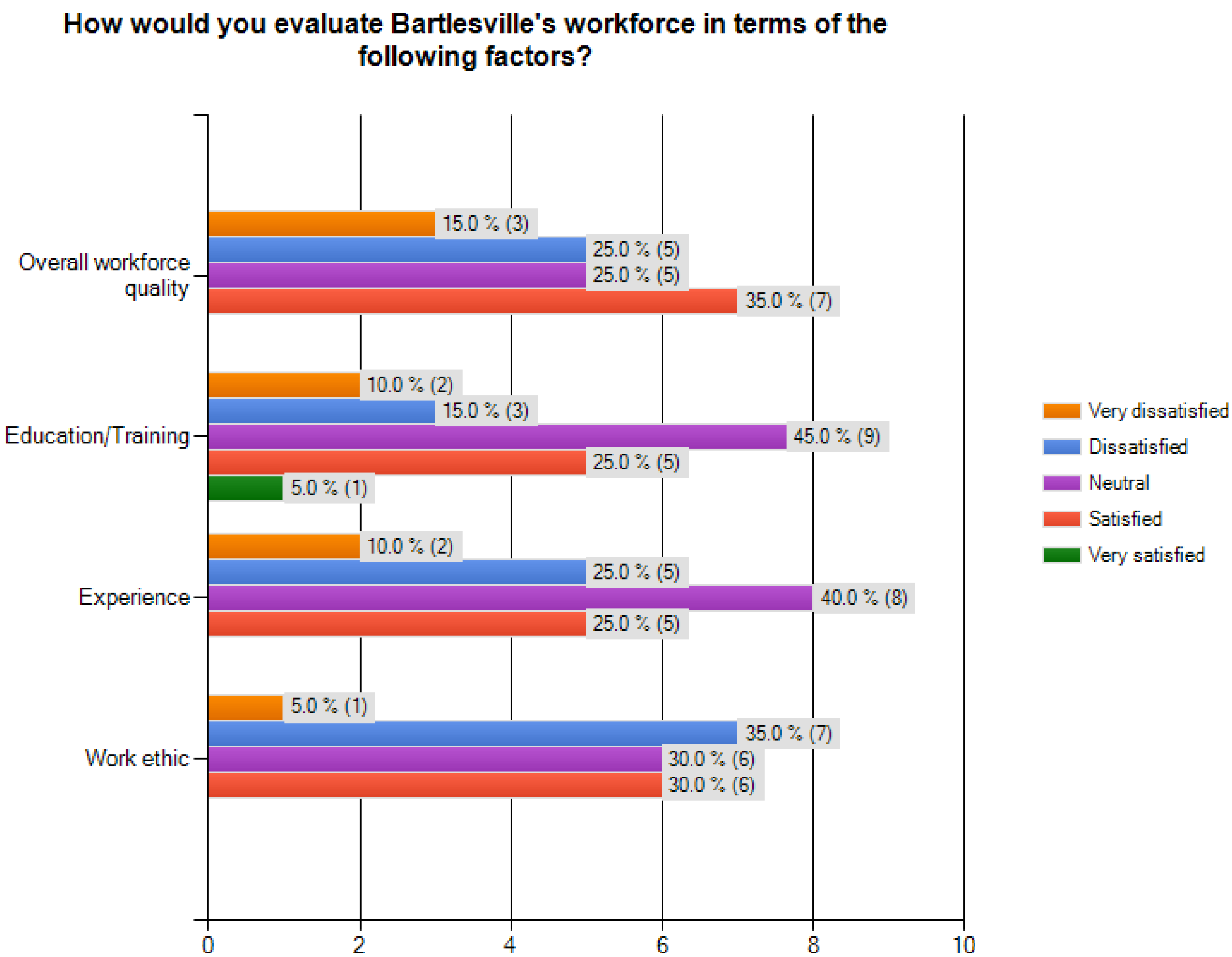
What are Bartlesville's most significant challenges that impact your business and its ability to grow? (Choose up to three.)



BIGGEST CHALLENGES FOR RETAIL BUSINESS GROWTH

Access to a growing customer base and skilled workers present the biggest challenges for retail growth.

- Access to a steady and growing customer base was seen as the overall biggest challenge for retail business growth.
- Government intervention and regulation was not seen as much of a challenge for retail business growth.



BARTLESVILLE'S WORKFORCE

Bartlesville's business community is dissatisfied with the overall quality of the local workforce, but mostly disinterested in education/training programs.

- Work ethic was cited as a common problem among the local workforce.
- 40% of businesses were dissatisfied or very dissatisfied with Bartlesville's overall workforce quality.
- 25% of businesses were dissatisfied or very dissatisfied with the education/training level of Bartlesville's workforce, whereas 45% had a neutral view toward the education/training of the workforce.

RETAIL OFFERINGS: COMMUNITY SURVEY

COMMUNITY SURVEY SUMMARY

The following pages provide a summary of the community survey results related to retail offerings. A detailed breakdown of results from the survey can be found in Appendix A: Detailed Community Survey Results.

"Bville is doing a great job adapting to uncontrollable changes and looking forward. This project/survey are appreciated and I hope actually create further improvement. It's a challenge, but we've got great people in charge and a community who pitches in to help make things stay great and get better. Thanks for the opportunity to participate! Go Bville, Go!"

- Community Survey Response

BARTLESVILLE'S RETAIL OFFERINGS: DEFINING THEMES

A thorough analysis of the retail topics in the community survey results yielded a several common themes.

- Bartlesville is unique community with a small-town atmosphere and big-city cultural amenities.
- Bartlesville has a shortage of high-quality retail and restaurant options.
- Bartlesville is lacking in nightlife and entertainment for young adults.
- Downtown Bartlesville is a truly unique asset that has great potential for further development as a destination for new retail, restaurants, and housing.

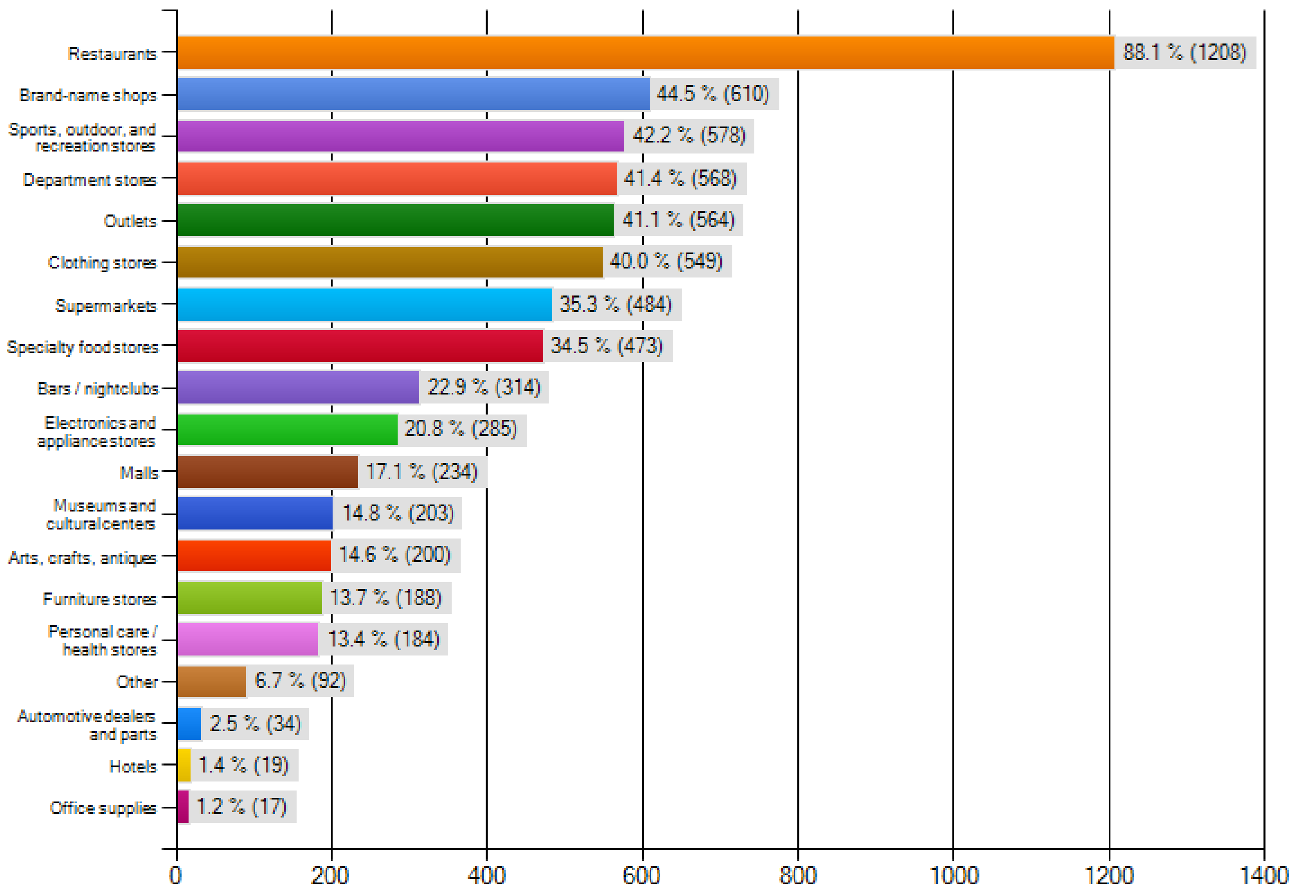
"Bartlesville needs to continue to develop the downtown district and create retail/restaurants to attract and retain young professionals. This needs to be a town they enjoy living in, not just where their job is."

- Community Survey Response

"I would appreciate a broader variety of restaurants (like Indian, Cajun, etc), especially if the service in the restaurants Improved!"

- Community Survey Response

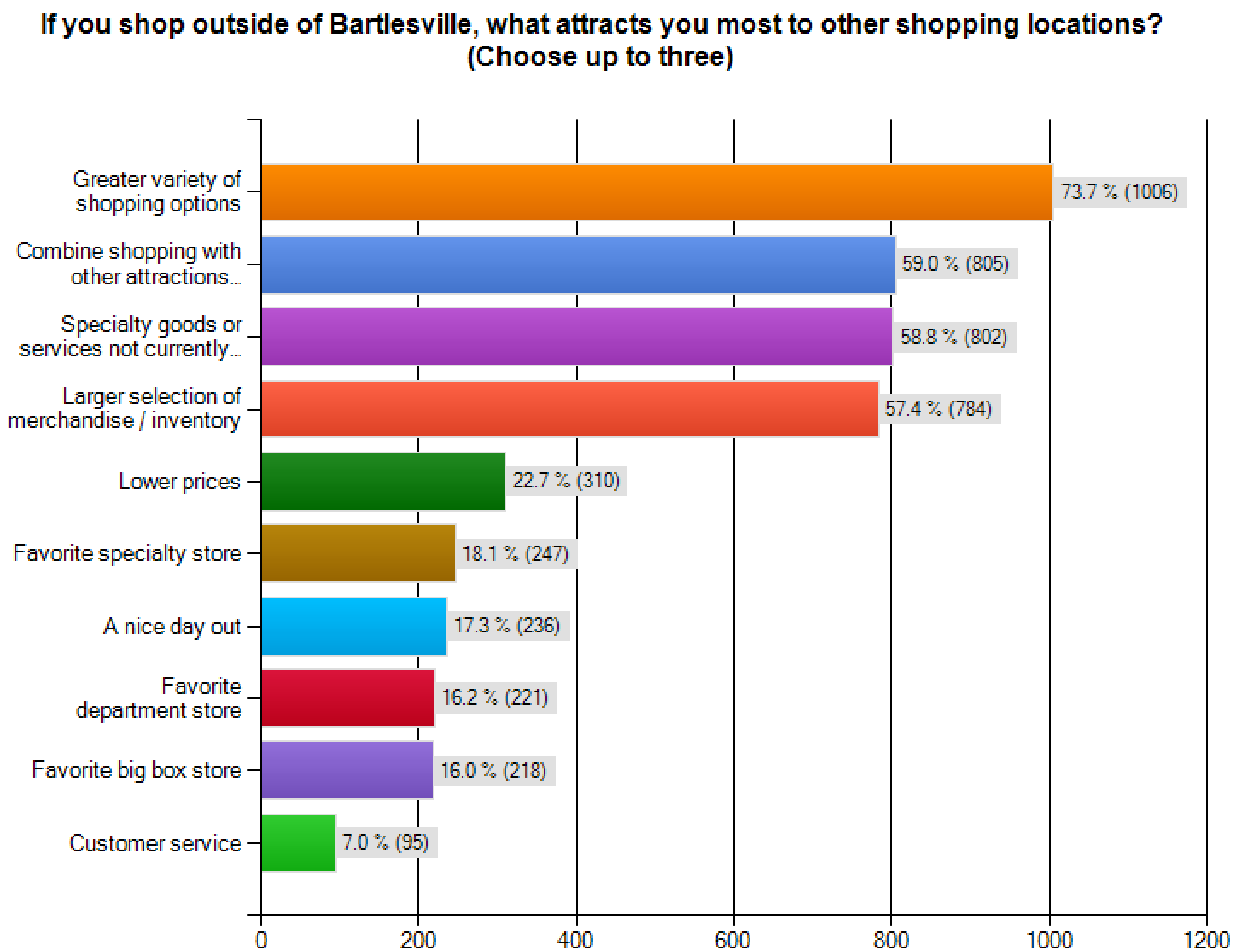
Which types of businesses would you most like to see expand or open in Bartlesville? (Choose up to five)



RETAIL BUSINESSES MOST DESIRED BY RESIDENTS

More dining options are overwhelmingly viewed as the most desired businesses by Bartlesville residents.

- Nearly twice as many survey respondents choose restaurants over other types of business they would like to see expand in Bartlesville.
- Office supplies, hotels, and automotive dealers/parts were seen as the least popular businesses sought for expansion.



LOSS OF RETAIL SPENDING TO OTHER CITIES

Residents of Bartlesville prefer a large and diverse selection of merchandise to choose from when shopping.

- Bartlesville residents prefer multitasking on their shopping trips as well as having a variety of shops to choose from.
- Lower prices and customer service are factors not solely influencing the shopping habits of Bartlesville residents.

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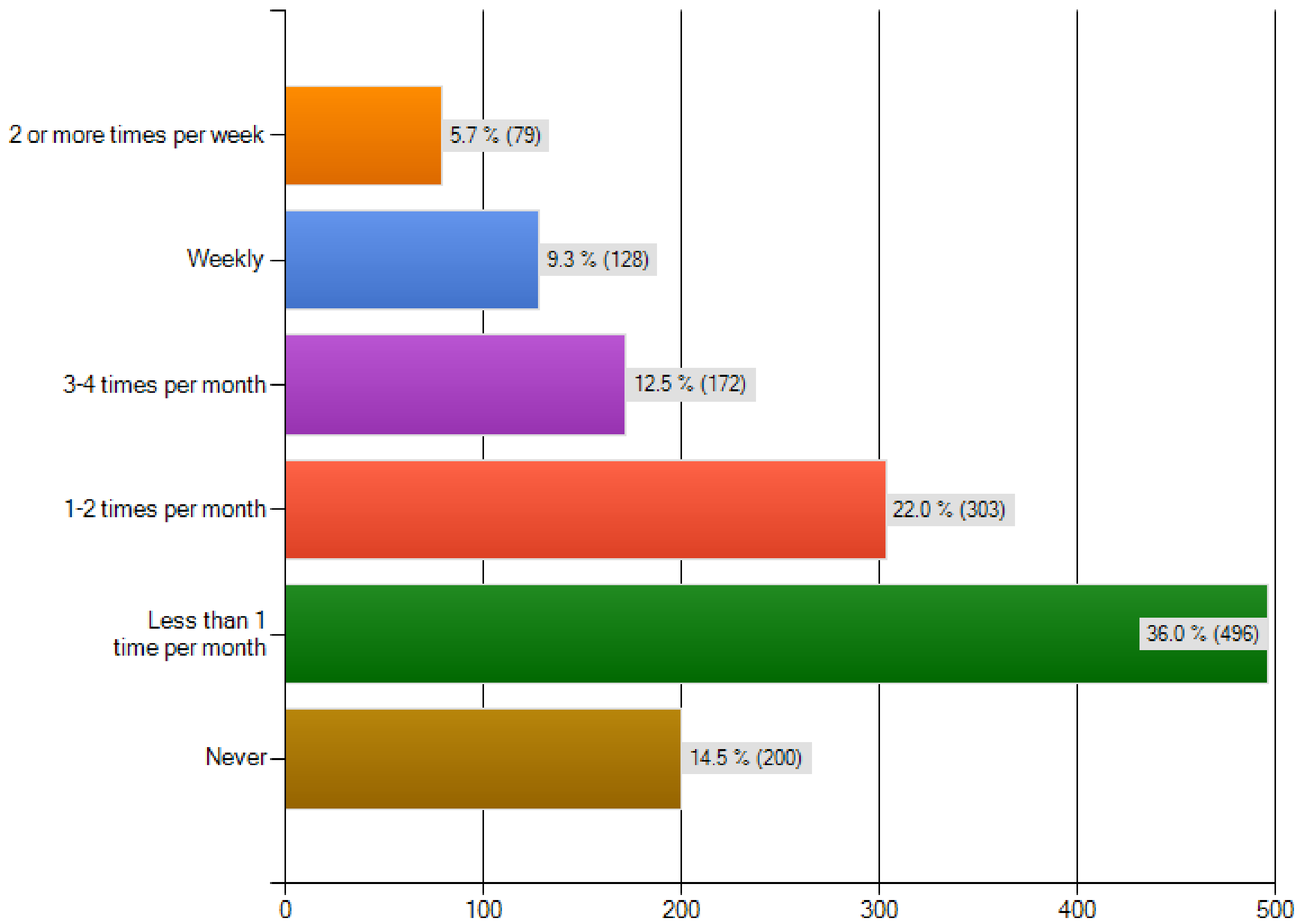
How often do you shop online for retail items that can be purchased locally?

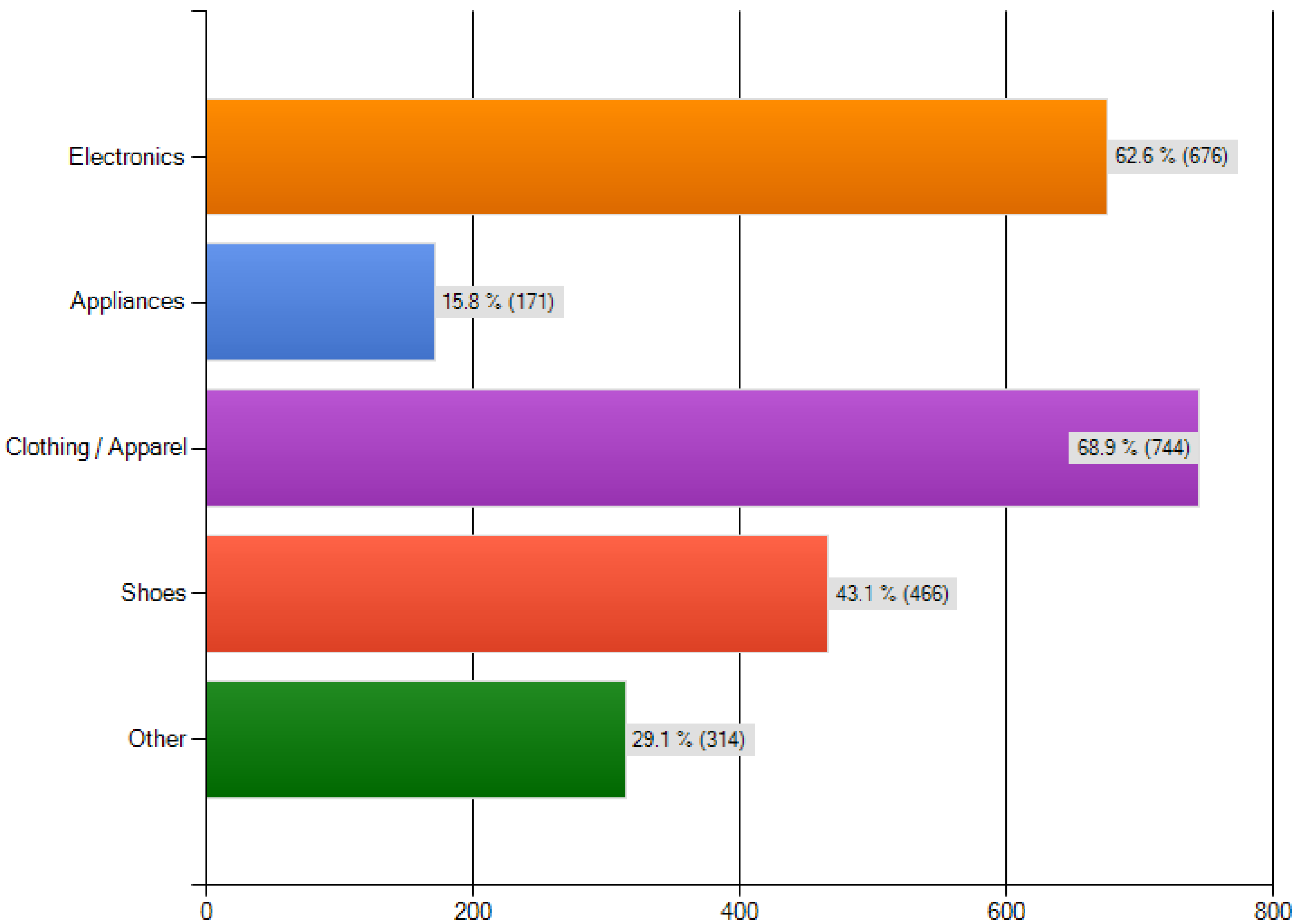


FREQUENCY OF ONLINE SHOPPING

Online shopping is not a major experience for most Bartlesville residents.

- Half of all survey respondents shop online less than one time per month.
- Fifteen percent of all survey respondents shop online at least once a week.

Do you regularly shop online for any of the following items? (select all that apply)



MOST COMMON TYPES OF ONLINE PURCHASES

When Bartlesville residents do shop online, clothing/apparel is the most common merchandise purchased.

- Electronics are the second-most popular merchandise (62.3 percent) purchased online by survey respondents
- Appliances are the least popular merchandise (15.8 percent) purchased online by survey respondents.

STRATEGIC RECOMMENDATIONS

The Strategic Recommendations comprises a set of priority projects, initiatives, and actions organized around the following three strategic areas:

PRIORITY PROJECTS

Bartlesville's strong employment base, its unique downtown, and its high-quality K-12 academics are all distinctive competitive advantages for a community of its size; however, these assets are in many ways, underutilized. Moreover, if these strengths are not properly cultivated through strategic public investments and broad-based community support, Bartlesville could potentially experience a deterioration of these valuable assets over time. In the pages that follow, a set of priority projects are recommended for consideration as community investments to more fully leverage these underutilized assets.

QUALITY OF LIFE IMPROVEMENT STRATEGIES

Bartlesville residents enjoy a high quality of life overall. An excellent family environment, a low cost of living, access to Tulsa, K-12 educational quality, low crime rates, and arts/cultural amenities are some of the city's strongest assets. Yet, Bartlesville faces numerous challenges in maintaining and improving its quality of life, especially for young professionals. Several strategies to address the critical gaps in Bartlesville's quality of life amenities are recommended in the following pages.

RETAIL ENHANCEMENT STRATEGIES

Bartlesville residents place a high level of importance on the availability of retail and restaurant options, but rate the city as below average in its retail/restaurant offerings. This challenge is not unique to Bartlesville. Small and mid-size communities across the country struggle to satisfy their residents' desire for local shopping venues. However, Bartlesville possesses a number of unique assets that can be tapped to address these deficiencies. In the pages that follow, several strategies are recommended for improving local shopping opportunities for Bartlesville residents while growing the city's tax base.

"We need to maintain a community that can attract doctors and other professionals that may not have a connection to Bartlesville."

- Community Survey Response

PRIORITY PROJECTS

The following pages outline action items associated with the three Priority Projects identified, which include:

Priority Project 1 – Downtown District:

Develop a robust network of public infrastructure centered on downtown Bartlesville to better connect the city's many unique assets, while creating a more user-friendly experience for residents and visitors alike.

Priority Project 2 – Parks & Recreation:

Create a high-quality activity complex to serve the current and future needs of Bartlesville residents that attracts thousands of annual visitors, while ensuring that existing parks and recreation assets are properly maintained, improved, and expanded over time.

Priority Project 3 – Public Schools:

Generate widespread community support for anunprecedented investment in Bartlesville's K-12 schools that will benefit existing and future residents, while strengthening the city's future economic development prospects.

Image Source: Bartlesville Regional Chamber of Commerce

PRIORITY PROJECT 1 – DOWNTOWN DISTRICT

Develop a robust network of public infrastructure centered on downtown Bartlesville to better connect the city's many unique assets, while creating a more user-friendly experience for residents and visitors alike.

Downtown areas are the "living rooms" of communities. A city's downtown is often the first area that is experienced by visitors (tourists, prospective residents, and prospective investors/ businesses) and is used by these visitors to develop an impression of the quality of the city as a whole. The vibrancy and economic health of Bartlesville's downtown and its immediate surroundings are critical to the long-term prosperity of the entire city. Moreover, Bartlesville's downtown contains the community's largest concentration of unique natural, cultural, and historic assets that differentiate the city from other areas. It will be critical for Bartlesville's quality of life, retail market, and overall economic prosperity for to build on positive momentum taking place in the development of downtown Bartlesville as a major cultural/retail/entertainment destination.

ACTION 1.1

Improve pedestrian and bicycle connectivity between downtown Bartlesville and other important community assets (Johnstone Park, Pathfinder Parkway, Sooner Park).

ACTION 1.2

Implement streetscape improvements (trees, benches, raised crosswalks, public art) throughout downtown Bartlesville, beginning with primary activity corridors such as Dewey Street, 2nd Street, Frank Phillips Boulevard.

ACTION 1.3

Consider establishing a Business Improvement District (BID) in downtown Bartlesville, which could provide new funding sources for infrastructure (streetscape/ pedestrian improvements, downtown wayfinding signage) and services to local businesses (waste/recycling pick-up and joint marketing) in downtown Bartlesville. *(See New York, NY example to the right)*

Best Practice

NYC Small Business Services

New York, NY – Business Improvement Districts (BIDs)

New York City has 64 BIDs, more than any other city in North America, ranging from large organizations like the Times Square Alliance to small BIDs along neighborhood commercial corridors outside of Manhattan. New York City's BIDs invest about $100 million a year in the city's neighborhoods and commercial districts. The BIDs are public/private partnerships in which property and business owners elect to make a collective contribution to the maintenance, development and promotion of their commercial district. The concept for BIDs was originally modeled on the shared maintenance functions of suburban shopping centers, in which a single property owner sublets retail space to multiple tenants that each pay a common area maintenance fee to enhance the appearance of common areas and provide joint advertising for the shopping center and its stores. BIDs work in a nearly identical fashion with the primary difference of having multiple property owners instead of relying on a single entity.

BIDs provide a number of benefits including:

- A safer, cleaner, more attractive business district
- A stable funding source for services to local businesses and infrastructure improvements
- A business district that can better compete with surrounding commercial areas
- Higher property values and lower vacancy rates

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PRIORITY PROJECT 2 – PARKS & RECREATION

Create a high-quality activity complex to serve the current and future needs of Bartlesville residents that attracts thousands of annual visitors, while ensuring that existing parks and recreation assets are properly maintained, improved, and expanded over time.

Communities across the United States have made substantial public investments in athletic complexes that have generated measurable economic development benefits. In fact, hundreds of Bartlesville families travel with their children on a regular basis to attend youth sports tournaments in other cities. Bartlesville should overcome its overly cautious approach to public investments in parks and recreation facilities in order to provide the high quality sports and recreation facilities that are desired by its residents. The successful development of a major, high-quality athletic complex would provide a higher quality of life for Bartlesville's current and future residents and would yield even greater benefits for the city's retail/restaurant businesses and tax base. A greater appreciation is also needed for the wide range of community benefits provided by Bartlesville's existing parks and recreation infrastructure and sustained increases in maintenance funding are also necessary.

ACTION 2.1

Prepare a development plan for an appropriate site in Bartlesville for a multi-use sports and activity complex and focus on promoting compatible, and preferably, pedestrian-friendly mixed-use development, in areas surrounding the activity complex. Begin preparing a marketing strategy to promote the site to various users within and outside of the Bartlesville region and/or Oklahoma.

ACTION 2.2

Consider issuing a ballot initiative for a ½ cent sales tax to raise funds for the development of an activity complex. Utilize the findings in the 2009 Bartlesville Parks and Recreation Development Plan to guide the mixture of uses in the proposed activity complex, striving to balance uses between those most desired by Bartlesville residents and those most likely to attract outside visitors.

ACTION 2.3

Conduct a comprehensive economic impact analysis of the activity complex and widely publicize it in advance of a ballot initiative.

ACTION 2.4

Work with Bartlesville's business and government leaders to call attention to the need for maintaining, improving, and expanding the city's parks and recreation infrastructure.

ACTION 2.5

Seek sustainable funding sources to finance the ongoing maintenance of Bartlesville's parks and recreation assets. Consider utilizing a portion of the recommended ½ cent sales tax to also provide additional financing capabilities for basic upkeep of existing park facilities.

PRIORITY PROJECT 3 – PUBLIC SCHOOLS

Generate widespread community support for an unprecedented investment in Bartlesville's K-12 schools that will benefit existing and future residents, while strengthening the city's future economic development prospects.

Despite having some of the academically best-performing K-12 schools in the State of Oklahoma, Bartlesville's K-12 facilities are not commonly regarded as a strong asset. This affects Bartlesville's economy in a somewhat invisible, yet insidious, manner. While long-time Bartlesville residents and business owners are well aware of the quality K-12 education provided by local schools, no one will ever know how many prospective residents and prospective businesses considered relocating to Bartlesville and decided to take their residence or business investment elsewhere after failing to look past the physical facilities and never taking a closer look at the outstanding academic quality of Bartlesville's schools.

ACTION 3.1

Develop an ambitious long-range facility improvement plan, building on the goals and strategies laid out in the Bartlesville Public School District's *Bruin's GPS 2017 Strategic Plan* and place the plan in a public referendum. However, ensure that the facility improvement plan can easily be broken into multiple phases to allow for more ease of financing options.

ACTION 3.2

Maintain a high level of priority among regional economic development partners and business leaders to support the Bartlesville Public School District's *Bruin's GPS 2017 Strategic Plan* and the proposed facility improvement referendum.

ACTION 3.3

Publicly celebrate the academic excellence of Bartlesville's K-12 schools on a continual basis, benchmarking them against other top-rated national school districts in Oklahoma and across the U.S.

"The public schools are in sad shape...Our teachers and kids deserve better!"

- Community Survey Response

"Our educational facilities really must be improved in appearance and modernization."

- Community Survey Response

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QUALITY OF LIFE IMPROVEMENT STRATEGIES

The following pages outline the action items associated with the three Quality of Life Improvement Strategies identified, which include:

Strategy Q1:	Accelerate the development of diverse, high-quality housing options throughout Bartlesville.
Strategy Q2:	Establish and support the growth of an "Arts District" in downtown Bartlesville.
Strategy Q3:	Work with Bartlesville's numerous community organizations to develop a more unified approach to civic engagement and community development, adopting and promoting "One Bartlesville" as the tagline for all of the city's community organizations.

Image Source: Bartlesville Development Corporation

STRATEGY Q1 *Accelerate the development of diverse, high-quality housing options throughout Bartlesville.*

ACTION Q1.1

Hold periodic meetings with local governments and real estate developers to work collaboratively to pursue opportunities to stimulate the development of new housing options in Bartlesville. Use these public-private meetings as a forum to continually monitor the city's land use codes and development review processes to identify and remove any barriers that prevent the construction of new housing or the renovation of existing homes.

ACTION Q1.2

Seek out Tulsa area real estate developers that have built successful housing products that are lacking and have strong market potential in Bartlesville – downtown apartments, garden homes, townhomes, and large-scale apartment complexes – and work with them to explore opportunities to develop similar products in Bartlesville.

ACTION Q1.3

Building on the success of Downtown Bartlesville, Inc.'s façade improvement program, consider the creation of a privately-funded "Protect the Past, Invest in the Future" fund that reduces the redevelopment costs associated with aging, yet historic, downtown structures into loft housing by tapping into Bartlesville's community generosity to help alleviate the cost of necessary mitigation measures required in building modernizations and retrofits.

ACTION Q1.4

Work proactively to address the lack of short-term housing with the following initiatives:

- Develop an extended-stay hotel.
- Work with existing hotels to explore the possibility of expanding services to include extended-stay options.
- Work with existing rental properties to investigate the potential for short-term leases (e.g. 3-month, 4-month, and 6-month)

ACTION Q1.5

Explore the market feasibility of a new downtown high-rise apartment and/or condominium building. If successful, such a building would provide desirable housing options in the city's urban core and would also garner widespread notoriety for Bartlesville. This would build upon on the city's already one-of-a-kind status of being a small town in Oklahoma with a veritable skyline and Frank Lloyd Wright's only built skyscraper, by making it one of the only (if not the only) small towns in the U.S. that is actively developing downtown high-rise living options.

"I have lived in Bartlesville all my life, but as a young single adult I find it difficult to stay here with the lack of housing options for young adults."

- Community Survey Response

STRATEGY Q2 *Establish and support the growth of an “Arts District” in downtown Bartlesville.*

ACTION Q2.1

Package downtown Bartlesville’s multiple arts/cultural attractions together, marketing them as a cohesive “Arts District” destination, centered on the Price Tower. Consider developing the “Arts District” into a “destination retail” district over time through aggressive business recruitment and marketing, as well as public investments where appropriate.

ACTION Q2.2

Develop an annual architecture competition to be held in Bartlesville’s “Arts District”, hosting thousands of aspiring student architects as well as accomplished professional architects in Bartlesville over a multi-day event to showcase their architectural work. Hold the competition during one of the least busy months for local retail businesses to generate additional customer activity and revenue for local merchants. *(See ArtPrize example to the right)*

ACTION Q2.3

Work with Bartlesville’s K-12 schools and higher education institutions to develop a student-led public art program in which local high school and college students create permanent and temporary public art for ongoing display throughout the “Arts District”.

*Destination retail can either take place in a mixed-use entertainment/shopping district or it can be focused on a single retail establishment. Bricktown in Oklahoma City is a good example of a destination retail district. Examples of destination retail establishments inclue: Cabela’s, Bass Pro Shops, Ikea, Nebraska Furniture Mart, and major outlet malls.

ACTION Q2.4

Aggressively work to expand Rogers State University’s (RSU) campus in downtown Bartlesville, focusing first on expanding and/or relocating the Department of Fine Arts from RSU’s main campus in Claremore to the downtown Bartlesville campus.

Best Practice

Grand Rapids, MI – ArtPrize

ArtPrize is a large gathering of artists in downtown Grand Rapids, MI in which spectators vote on artists’ work via the internet or mobile phone. The artist with the most votes gets a $200,000 prize. In September of 2009, the first time the event was held, there were 1,262 artists throughout 159 venues. Event planners estimated that there were over 200,000 visitors who came to Grand Rapids for the occasion.

Over the past three years, ArtPrize has attracted almost 1 million visitors to the area for a chance to see and vote on the artists’ work. There have been over 4,500 artists whose work has been displayed at the event. The entire event lasts for two to three weeks, and the city of Grand Rapids claims that it is the world’s largest art competition.

““Bartlesville was very strong in the arts and did an excellent job supporting the arts. I returned to Bartlesville to contribute to the arts community.”

- Community Survey Response

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STRATEGY Q3 *Work with Bartlesville's many community organizations to develop a more unified approach to civic engagement and community development, adopting and promoting "One Bartlesville" as the tagline for all of the city's community organizations.*

ACTION Q3.1

Establish a coalition of Bartlesville's community organizations under the name "One Bartlesville" to present a united message of community support to all of Bartlesville's residents and businesses.

ACTION Q3.2

Utilizing the "One Bartlesville" coalition, streamline and simplify the city's existing volunteerism and philanthropy efforts to make the best use of citizens' time and effort, also working to reduce the risk of burnout among Bartlesville's most active volunteers.

ACTION Q3.3

Under the leadership of the "One Bartlesville" coalition, work over time to identify synergies between community organizations and implement steps that improve the operating efficiencies of individual organizations, considering the merger or consolidation of organizations or of specific functional areas, where appropriate. Consider conducting a formal audit of community organizations to reveal where duplication of services exist and to provide a foundation of knowledge for this effort.

Best Practice

Kansas City, MO/KS – OneKC

The Kansas City Area Development Council (KCADC) developed a two-pronged campaign in 2004 to promote the greater Kansas City region as a unified economy: the ThinkKC and OneKC campaigns, together, ThinkOneKC. City, county and business leaders within the region focused on a simple asset, the region's easy-to-remember two-letter initials, KC. Through an aggressive marketing campaign that included 150 presentations to local groups and the use of 20 billboards, KCADC promoted the KC initials as a common identifier for the region and a way to position Kansas City as a preeminent urban area, amongst only three other U.S. cities known nationally by their initials: NY, LA, and DC. ThinkKC is the KCADC's national marketing and branding campaign, promoting the region as a top U.S. city for attraction of new companies, jobs, and residents.

OneKC is a good example of a campaign that successfully promotes regional cohesiveness and publicizes the economic, social, and cultural interdependence of the many jurisdictions that make up the Kansas City region. This campaign is especially important in Kansas City because the region spans two states and is made up of 18 counties and more than 50 individual communities. KCADC has a Branding Toolbox on its website that provides the ThinkKC and OneKC official campaign logos in a downloadable graphic format, with many variations of the logos, including logos for each of the region's 18 counties and 45 municipalities. This makes it easy for each individual community to simultaneously promote itself and the greater Kansas City region.

RETAIL ENHANCEMENT STRATEGIES

The following pages outline the action items associated with the five Retail Enhancement Strategies identified, which include:

Strategy R1:	Prioritize retail/restaurants as a target industry, focusing on niches that offer the greatest growth potential.
Strategy R2:	Enact retail-friendly public policies that create a more favorable climate for the growth of new and existing retail businesses throughout Bartlesville.
Strategy R3:	Improve community-wide access to small business and entrepreneur resources.
Strategy R4:	Create and aggressively promote a new marketing and branding strategy that reflects Bartlesville's many positive attributes and improves the image Bartlesville projects to the outside world.
Strategy R5:	Establish a common theme for downtown Bartlesville as a whole, or a specified district in downtown, that builds on the city's unique history as an oil boomtown and offers local retailers a new avenue for cross-marketing and business development.

Image Source: Bartlesville Regional Chamber of Commerce

STRATEGY R1 *Prioritize retail/restaurants as a target industry, focusing on niches that offer the greatest growth potential.*

ACTION R1.1

Focus retail industry targeting efforts on the creation, development, and growth of unique local restaurants and retail stores. Using this plan as a starting point, develop a consensus between all of Bartlesville's economic development partners on the primary responsibilities of each organization as they relate to retail development. Consider a partnership with the City, Chamber, and BDC to hire a part- or full-time retail consultant. *(See Elmhurst, IL example in Appendix E)*

ACTION R1.2

Through the Bartlesville Regional Chamber of Commerce, hold regular networking events to foster expanded coordination and knowledge-sharing among local retailers.

ACTION R1.3

Attend International Council of Shopping Centers (ICSC) conferences to promote Bartlesville to retailers. Pay special attention to franchise opportunities as it may be easier to attract brand-name retailers if they are franchises, locally owned, and not centrally managed chains.

ACTION R1.4

Work with the Chamber, the Bartlesville Convention & Visitors Bureau, and local retailers to establish a "Bartlesville Festival Development Committee" that holds periodic meetings to research, plan, and create new events and develop strategies to increase visitation to existing events, with the end goal of increasing year-round tourist visitation and spending at local retail shops, restaurants, and hotels.

ACTION R1.5

Embark on a permanent "buy local" initiative that educates local businesses, residents, and non-profit entities about the benefits of buying from local merchants. *(See Dane, WI example below)*

Best Practice

Think Local First

Dane, WI – Dane Buy Local

"Shop Local Campaigns for Small Towns" is an article written by Becky McCray which includes many best practice examples of successful buy local campaigns including "Dane Buy Local" in Wisconsin, http://www.danebuylocal.com/ which has over 500 members who sponsor the initiative. The article also identifies the top ten reasons to buy local and lays out seven strategies for establishing a successful buy local campaign in a small town.

Top Ten Reasons to Buy Local:

1. Dollars spent locally support vital public services locally.
2. Local businesses are a strong part of the uniqueness of the community.
3. You can develop strong relationships with local merchants.
4. Local merchants invest in the community.
5. Local purchases support local jobs.
6. Supporting a local business has positive effects on surrounding businesses clustered around it.
7. Local shops are more accessible for everyone.
8. You save by shopping locally.
9. Buying locally reduces your environmental impact.
10. Local purchases help attract new entrepreneurs and workers.

Strategies for a successful buy local program:

1. Get help and support from local businesses and key community leaders
2. Pick a theme which incorporates your town or county's identity into the slogan
3. Promote your most powerful local strengths
4. Create a few effective promotional materials
5. Kick off the initiative with events and media coverage, including a Facebook page
6. Measure success through surveys
7. Extend the reach of the program to include business-to-business transactions.

STRATEGY R2 *Enact retail-friendly public policies that create a more favorable climate for the growth of new and existing retail businesses throughout Bartlesville.*

ACTION R2.1

Consider establishing incentive policies to attract "destination retail" establishments that generate new economic activity for the Bartlesville region and would generate additional revenue for the city's existing retail businesses. Ensure that incentives include requirements that projected economic and fiscal returns from assisted projects significantly outweigh public costs.

ACTION R2.2

Consider creating an Enhanced Sales Tax Incentive Program (ESTIP) to stimulate retail development by sharing sales tax revenue with participating retailers and developers. *(See Silverthorne, CO in Appendix E)*

ACTION R2.3

Create a "Fast-Track" development review program to accelerate the process of development review for projects of strategic importance to the City of Bartlesville, including new retail and restaurant establishments. *(See Riverside, CA example in Appendix E)*

ACTION R2.4

Launch a website development matching program for local retailers with grants up to $5,000 or 50% of the project cost (whichever is less) to be used for website design/redesign, updates, search engine optimization, social networking, and database/application development.

ACTION R2.5

Seek out and cultivate relationships with Tulsa area real estate developers that have built successful retail developments and/or "lifestyle shopping centers"* and work with them to explore opportunities to create new retail developments or re-develop existing shopping centers in Bartlesville.

ACTION R2.6

Work to revitalize Bartlesville's existing shopping centers over time, transitioning them toward the lifestyle shopping center model. Consider offering performance-based loans and/or matching grant programs that would be used for redevelopment, building/façade improvements, landscaping enhancements, parking lot improvements.

ACTION R2.7

Proactively market the types of projects for which incentives are offered and list all available incentives on marketing materials to help prevent Bartlesville from being overlooked by prospects that may otherwise perceive the city to have limited incentives.

*Lifestyle shopping centers offer a wider range of retail and services in a more upscale, pedestrian-scaled environment than typical shopping centers

STRATEGY R3 *Improve community-wide access to small business and entrepreneur resources.*

ACTION R3.1

Work with the Tri County Technology Center (TCTC) and Bartlesville's K-12 schools and integrate a stronger set of business-focused curricula (particularly entrepreneurship and international business) in local schools, using this also as an opportunity to increase interest in youth civic engagement.

ACTION R3.2

Expand the scope of the Build Bartlesville initiative to include separate business plan competitions for local high school students as well as for non-student entrepreneurs. Hold an annual ceremony to recognize the winners of each business plan competition.

ACTION R3.3

Consider re-locating the Bartlesville region's multiple small business and entrepreneur support resources in a single location in downtown Bartlesville to achieve the dual objectives of improving the operating efficiencies of each business support entity while providing a highly accessible location for local businesses seeking resources. Similarly, consider creating a "front page" website that centralizes internet access to every Bartlesville area small business and entrepreneur resource. (*See San Angelo, TX example to the right)*

ACTION R3.4

Work with the Tulsa SCORE chapter to establish a physical SCORE location in Bartlesville so that small businesses can more easily tap into the knowledge base of Bartlesville's retired professionals.

Best Practice

San Angelo, TX – Business Resource Center

In 2009, a group of visionary leaders representing San Angelo's economic development partners decided to develop a facility that would house the majority of the region's economic development and small business support functions in a central location in downtown San Angelo. Economic development partners involved in this effort include the City of San Angelo Development Corporation, the San Angelo Chamber of Commerce, the Angelo State University Small Business Development Center, Howard College, the Concho Valley Center for Entrepreneurial Development, Downtown San Angelo, Inc., and the Concho Valley Angel Netowrk. The primary goals of this facility, known as the BRC (Business Resource Center), are to:

- Provide a highly visible "one stop shop" for business retention/expansion and business attraction
- Create an enhanced support environment for the region's small businesses and entrepreneurs
- Improve operating efficiencies and knowledge sharing among the region's economic development partners

Moreover, the BRC is being built in a renovated, formerly vacant building that sits along an underutilized downtown corridor immediately between the core of San Angelo's central business district and the Concho Valley Transit Center, a new multi-modal transportation facility being developed on the north end of downtown. This location was chosen strategically to serve as a catalyst for additional downtown revitalization. Renovations and construction in the BRC are now complete and the facility has been operational since November 2012.

For more information visit:
http://www.cvbiz.org/brc.html

STRATEGY R4 *Create and aggressively promote a new marketing and branding strategy that reflects Bartlesville's many positive attributes and improves the image that Bartlesville projects to the outside world.*

ACTION R4.1

Embark on a community branding initiative that yields a new brand/image of Bartlesville that celebrates Bartlesville's unique past as a frontier/oil boom town while also highlighting the city's sophisticated cultural assets and its modern corporate base. Develop a tagline from this effort that is adopted by all of Bartlesville's economic development partners in marketing, business recruitment, and tourism promotion efforts.

ACTION R4.2

Launch a vigorous marketing campaign that closely aligns with the new brand that emerges from the community branding initiative that promotes Bartlesville as a unique visitor destination with numerous one-of-a-kind attractions. Call attention to key assets:

- Downtown Bartlesville
- Price Tower
- Woolaroc Museum and Wildlife Reserve
- Pathfinder Parkway
- One-of-a-kind local shops/eateries

ACTION R4.3

Focus marketing and advertising efforts on large population centers near Bartlesville, placing emphasis on the Tulsa MSA and, to a lesser extent, Oklahoma City and Wichita.

ACTION R4.4

Develop and implement a citywide wayfinding signage master plan that complements the new brand and points visitors to Bartlesville's major shopping areas and tourist attractions, while raising overall awareness of the city's unique assets for visitors and residents alike.

Best Practice

City of Fort Collins

Fort Collins, CO – Image Enhancement

In 2012, the City of Fort Collins, Colorado published an updated "Economic Health Strategic Plan." Their mission stressed the importance of crafting the appropriate image of the city. One strategic goal was to raise awareness of Fort Collins as a source of innovation to attract and engage investors and entrepreneurial talent to spur economic growth. The plan called to utilize the Colorado State University (CSU) alumni network to find entrepreneurs who might be interested in investing in Fort Collins. The plan also focused on collaborating with Metro Denver and the greater Denver region to attract the broadest pool of talent available.

The City intends to market business successes of startups in Fort Collins and CSU as well as to larger, established firms outside of Fort Collins. Marketing the quality of life and culture in Fort Collins is an aspect aimed at enhancing the image of Fort Collins to businesses and talent both in and outside of the city limits. A case-in-point is the presence of breweries in Fort Collins, which is an attraction for visitors and residents, alike. Not only does this stand as a business venture, but also as a sign of ease and pleasure in the culture of Fort Collins. In addition to the breweries, arts are also a profitable part of the Fort Collins community making it a regional destination for retail and recreation. Fort Collins has begun to craft the image it wants the world to see by becoming a place where one can work, live, and enjoy life.

STRATEGY R5 *Establish a common theme for downtown Bartlesville as a whole, or a specified district in downtown, that builds on the city's unique history as an oil boomtown and offers local retailers a new avenue for cross-marketing and business development.*

ACTION R5.1

Consider establishing a themed district in downtown Bartlesville with the moniker "Boomtown District" to draw a high level of energy and activity into a concentrated area. Work to develop the "Boomtown District" into a "destination retail" district through strategic public investments, targeted business recruitment, and aggressive marketing. *(See Wamego, KS example to the right), (See also "Arts District" Strategy Q2)*

ACTION R5.2

Work with Downtown Bartlesville, Inc., the City, the Chamber, and downtown stakeholders to co-locate businesses in the "Boomtown District" that mutually reinforce each other. Examples of potential businesses that could locate in such a district include:

- Restaurants/coffee shops
- Breweries/wineries
- Apparel/specialty retailers
- Hotels/Bed and breakfasts
- Entertainment venues

ACTION R5.3

Develop an interactive, multi-day festival that celebrates Bartlesville's oil boom history and helps to build awareness and brand recognition of the "Boomtown District" outside of Bartlesville. Hold the festival during one of the least busy months for local retailers to generate additional customer activity and revenue for local merchants.

ACTION R5.4

Develop supportive public infrastructure (way finding signage, dedicated parking, pedestrian improvements) as needed to support the "Boomtown District".

Best Practice

Wamego, KS – The OZ Theme (Oz Museum, OZtoberFest, Oz Winery)

The town of Wamego, KS (population 4,372) has successfully created a theme centered around the Wizard of Oz in their downtown that has resulted in the addition of thousands of annual visitors and millions of dollars in extra spending within their local economy.

The Oz theme first arose in Wamego when a public display of a local high-school kid's Wizard of Oz collectibles in Wamego's Columbian Theater drew a significant amount of attention. The discovery of this rare and unique collection of Oz memorabilia led to the establishment of an Oz Museum that now houses thousands of Oz-related artifacts. Soon thereafter, a local businessman opened up the Oz Winery which has been a major success. The creation of an annual Oz-focused event – OZtoberFest – has created a greater level of activity and interest in the Oz theme. Building on the success, additional existing businesses in downtown Wamego changed their names or have begun to offer products with names that align with the emerging Oz theme such as nearby restaurant Toto's Tacoz, and 1st National Bank of Wamego, a local bank which offers a limited edition Oz credit card.

COMMUNITY SCORECARD

IMPLEMENTATION OF 2006 STRATEGIC PLAN

In 2006, AngelouEconomics worked over a period of several months in partnership with Bartlesville's business and government leaders to develop the Strategic Plan for a Globally Competitive Community. The community of Bartlesville adopted this strategic plan as the guiding blueprint for the city's economic development program over the next several years. While Bartlesville has made progress on implementing some of the recommendations provided in 2006, many challenges remain and now is the time for community leaders to redouble their efforts toward improving the city's economy.

The 2006 Strategic Plan provided goals, strategies, and action items centered on five broad themes:

- Business Climate
- Workforce and Education
- Sites and Infrastructure
- Quality of Life
- Economic Development and Marketing

"I believe we need to be more progressive and provide more things that would entice people of all ages to want to live here."

- Community Survey Response

The 2006 Strategic Plan also called attention to eight Priority Actions:

- 1. Develop a strong support system for entrepreneurs and small businesses.
- 2. Establish target industry working groups for each of the five targeted industries.
- 3. Establish a Business & Education Council to develop a long-term workforce plan for the region.
- 4. For the retention and attraction of the young professionals (vital elements of a strong workforce) empower the Young Professionals Group to become involved in local activities and serve on committees and boards.
- 5. Develop Bartlesville Public Schools into a world-class system.
- 6. Focus on enhancing and strengthening Bartlesville's unique downtown on a block-by-block basis.
- 7. Enhance the retail offerings, including restaurants and shopping venues, throughout the community and work with a developer to create a "Destination Retail" opportunity.
- 8. Strategically implement the Pathfinder Recreation District Master Plan.

The following pages include a "Community Scorecard" analysis that rates Bartlesville on the progress that has been made toward implementing the recommendations provided in the 2006 Strategic Plan and offers critical next steps for each of the five goal areas.

BUSINESS CLIMATE GOAL: *Create a pro-business environment that produces higher wage jobs and prosperity for the region through support of entrepreneurs, small businesses and companies within targeted industries.*

BUSINESS CLIMATE STRATEGIES	Grade A: Implementation is complete Grade F: No progress on implementation					Assessment Rationale
	A	B	C	D	F	
Strategy 1: Develop a strong support system for entrepreneurs and small businesses.						Small business and entrepreneur-support resources remain scattered and disconnected from the needs of many local businesses and would-be entrepreneurs. Build Bartlesville is a step in the right direction.
Strategy 2: Establish target industry working groups for each of the five targeted industries.						Bartlesville has not established target industry working groups for its target industries. A more focused approach that leverages Bartlesville's existing major employers for the retention, expansion, and attraction of businesses and jobs within the city's target industries is needed.
Strategy 3: Provide a pro-business environment that promotes quality investment in the community and region.						Improvements have been made to City/County operational efficiencies. Local incentives are not very aggressive/targeted.

OVERALL GRADE: C-

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WORKFORCE AND EDUCATION GOAL: *Create a seamless system between workforce providers, educators, and business leaders that propels the Bartlesville area in the global economy.*

WORKFORCE AND EDUCATION STRATEGIES	Grade A: Implementation is complete Grade F: No progress on implementation					Assessment Rationale
	A	B	C	D	F	
Strategy 1: Establish a Business & Education Council to develop a long-term plan for the region.						Some progress has been made on workforce development, but there is no formalized long-term workforce plan. Workforce quality was noted as a major challenge by local employers.
Strategy 2: For the retention and attraction of young professionals (vital elements of a strong workforce) empower the Young Professionals Group to become involved in local activities and serve on committees and boards.						Bartlesville's young professionals are generally not actively engaged in economic development and community development efforts. Bartlesville's Young Professionals Group has not received the resources or support necessary to play a stronger role in the retention/attraction of young professionals to Bartlesville.
Strategy 3: Develop Bartlesville Public Schools into a world-class system.						BPSD has maintained its top-notch academic status in the state of Oklahoma, its physical facilities are not an asset. The *Bruin's GPS 2017 Strategic Plan* is a positive step.
Strategy 4: Continue a workforce assessment and skills assessment in targeted industries and existing industries.						The 2010 Economic Development Strategy Update included an assessment of workforce skills; however, this information has not been integrated into a long-range workforce plan.

OVERALL GRADE: C-

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SITES AND INFRASTRUCTURE GOAL: *The region will create the facilities and infrastructure needed to help existing and targeted industries succeed while improving the quality of the physical environment for residents.*

SITES AND INFRASTRUCTURE STRATEGIES	Grade A: Implementation is complete Grade F: No progress on implementation					Assessment Rationale
	A	B	C	D	F	
Strategy 1: Promote block-by-block downtown development, revitalization, and beautification.						Downtown Bartlesville is undeniably on the right track with numerous restaurants/bars, retailers, service businesses, and residences continue to locate in renovated buildings. Destination development and more vibrant public spaces are still untapped opportunities.
Strategy 2: Provide the infrastructure needed to attract and retain global companies and a global workforce.						Bartlesville has adequately maintained, but not expanded upon, its transportation infrastructure (highways, airport, rail).
Strategy 3: Expand transportation mobility for all residents within the region.						The CityRide Circuit has improved transportation mobility for Bartlesville residents, particularly low-income residents that do not have access to personal automobiles.

OVERALL GRADE: B+

QUALITY OF LIFE GOAL: *Preserve the high quality of life already present, and enhance the quality of life amenities necessary to attract new residents and businesses that can and will call this community home.*

QUALITY OF LIFE STRATEGIES	Grade A: Implementation is complete Grade F: No progress on implementation					Assessment Rationale
	A	B	C	D	F	
Strategy 1: Enhance the retail offerings including restaurants and shopping venues throughout the community and create a "Destination Retail" opportunity for tourism and economic development opportunities.						Retail/restaurant offerings in Bartlesville have improved moderately over the last several years, but remain far below the desires of most residents, and "Destination Retail" is still lacking. However, the decision to undertake this study is a major step in the right direction.
Strategy 2: Strategically implement the Pathfinder Recreation District Master Plan.						Bartlesville's parks/recreation assets remain under-funded for regular upkeep and for development of new facilities. However, as with the retail analysis, this study is a step in the right direction.
Strategy 3: Provide diverse housing options that are affordable and attractive for existing residents and those relocating to the area.						Housing options in Bartlesville have improved in the last several years. However, there remains a shortage of high-quality rental units and short-term housing.
Strategy 4: Expand the diversity of entertainment and cultural offerings in the area.						Bartlesville continues to boast a strong array of cultural offerings, but many of these are still focused more on the age 45+ cohort. However, Downtown Bartlesville is making progress toward becoming a more vibrant entertainment/ cultural district for all ages.

OVERALL GRADE: C+

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ECONOMIC DEVELOPMENT AND MARKETING GOAL: *The Greater Bartlesville area will increase awareness of the region as a business and tourism location destination and promote stronger regional collaboration in support of both.*

ECONOMIC DEVELOPMENT AND MARKETING STRATEGIES	Grade A: Implementation is complete Grade F: No progress on implementation					Assessment Rationale
	A	B	C	D	F	
Strategy 1: Expand programs that support the expansion and retention of existing industries and create new ones where appropriate.	●					Business retention/expansion has been successful, leading to multiple expansions of existing employers.
Strategy 2: Continue the relocation strategy through Bartlesvillejobs.com to assist employees considering relocating to the area or employers recruiting new talent or transferring staff.	●					Bartlesvillejobs.com continues to serve as a resource for job seekers and employers.
Strategy 3: Create and initiate a marketing campaign to attract target industries.			●			Marketing efforts have yielded limited results in terms of business attraction.
Strategy 4: Continue a marketing campaign that incorporates regional collaboration and promotes Bartlesville's new and existing attractions.			●			Tourism marketing efforts have yielded limited results, partially due to the lack of a consistent, identifiable brand.
Strategy 5: Continue promoting the activities and events in cooperation with state tourism officials to promote the 2007 Centennial Celebration.		●				Bartlesville placed a high level of priority for the 2007 State of Oklahoma Centennial Celebration and benefited through increased tourist visitation and widespread positive publicity.

ECONOMIC DEVELOPMENT AND MARKETING (CONTINUED)

ECONOMIC DEVELOPMENT AND MARKETING STRATEGIES	Grade A: Implementation is complete Grade F: No progress on implementation					Assessment Rationale
	A	B	C	D	F	
Strategy 6: Work in partnership with the Young Professionals (YP) Group to develop a marketing strategy and communication tools.						The Bartlesville YP group has continued to hold networking events, but has not been adequately involved actively in economic development and marketing efforts.
Strategy 7: Promote stronger collaboration within the region and analyze brand awareness.						A strong brand has not been developed for Bartlesville.
Strategy 8: Improve the information available on the BDC website concerning available sites with the usage of maps, pdf files, and more complete data.						Site and building information (including maps) is readily available on the BDC website.
Strategy 9: The BDC should continue to promote the assets of the communities of Dewey, Nowata, Pawhuska, Coffeyville, and Independence within the region for tourism and economic development.						The promotion of communities surrounding Bartlesville remains largely an untapped opportunity.
Strategy 10: Promote Bartlesville's designation as one of America's Dozen Distinctive Destinations by the National Trust for Historic Preservation.						Bartlesville is beginning to capitalize on its historic assets, most notably the Price Tower, which is being considered as a UNESCO site. However, much more can be done to leverage the city's historical significance.

OVERALL GRADE: C+

CRITICAL NEXT STEPS

GOAL AREAS	OVERALL GRADE	CRITICAL NEXT STEPS TO ACHIEVE A GRADE OF "A"
Business Climate	C-	• Identify community leaders that are able and willing to end the divisiveness and lack of trust between Bartlesville's various stakeholder groups, including many government and business leaders • Consolidate existing small business/entrepreneur support programs • Establish target industry working groups for each of Bartlesville's target industries to leverage the knowledge of local business leaders for the retention, expansion, and attraction of jobs and businesses within these industries • Enact business-friendly public policies (including, but not limited to, retail-specific incentives) and widely publicize these policies and incentives
Workforce and Education	C-	• Establish monthly meetings between education institutions (BPSD, RSU, Oklahoma Wesleyan, Tri-County Tech) and employers to improve communication and to address unmet workforce needs in a timely fashion. • Work with the Chamber to provide the necessary resources to Bartlesville's Young Professionals Group so that it can play a more active role in the retention and attraction of young adults to Bartlesville • Build public support for an unprecedented investment in BPSD's school facilities
Sites and Infrastructure	B+	• Create higher-quality gateways, landscaping features, and pedestrian/cyclist infrastructure along primary transportation corridors throughout Bartlesville • Cultivate relationships with Tulsa-area real estate developers to explore and pursue opportunities for new retail and residential development (and redevelopment of existing shopping centers) in Bartlesville • Accelerate the positive momentum taking place in the revitalization of downtown Bartlesville through continued public investments and public-private partnerships
Quality of Life	C+	• Place a greater emphasis (and more public funding) on parks/recreation, both for new facilities (such as the proposed activity complex) and existing facilities • Build public consensus for a quality of life bond package to fund the proposed activity complex • Utilize the "One Bartlesville" concept to improve the efficiency and level-of-service of community-based organizations
Economic Development and Marketing	C+	• Establish regular (monthly or, at least, quarterly) coordination meetings between Bartlesville's economic development partners (City, BDC, Chamber) to discuss immediate economic development issues and as long-term priorities • Embark on a community branding exercise that results in a consistent brand to be adopted by all of Bartlesville's economic development partners • Proactively develop and execute new festivals/events to increase tourism visitation/spending in Bartlesville • Aggressively pursue the development and promotion of the "Boomtown District" concept for a portion or all of downtown Bartlesville

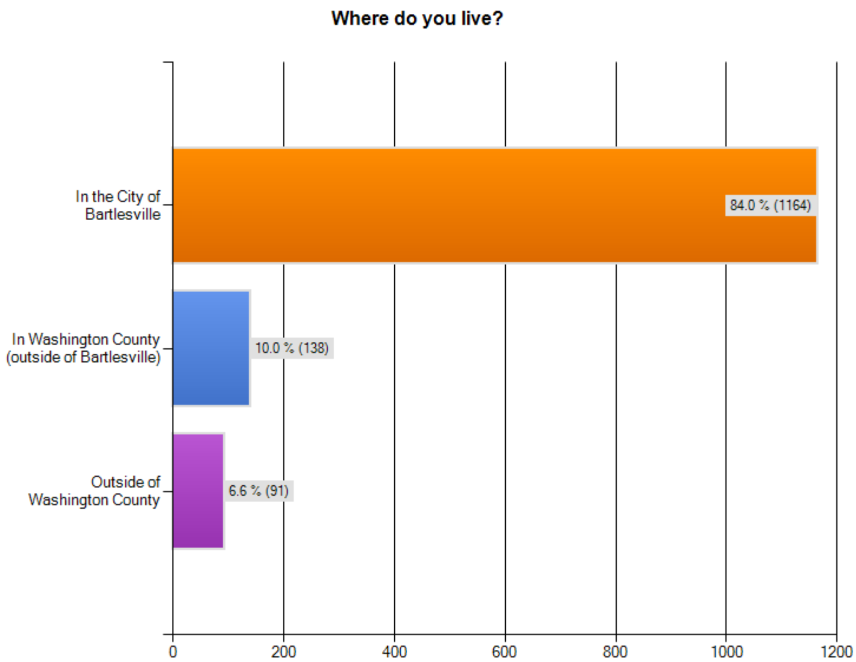
APPENDIX A: DETAILED COMMUNITY SURVEY RESULTS

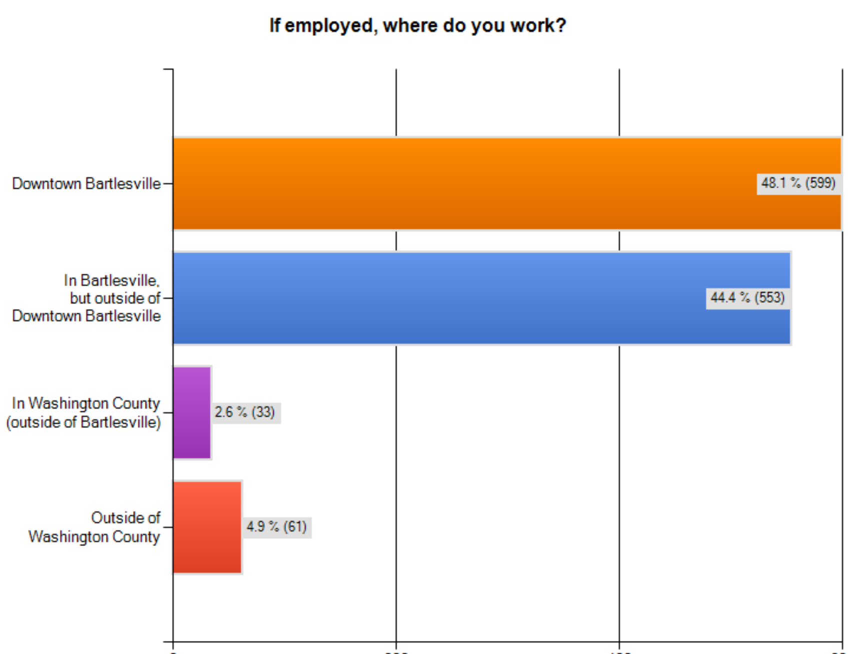
BARTLESVILLE COMMUNITY SURVEY

As part of the data collection process, an online survey was developed to glean insight from Bartlesville community members on topics related to economic development, quality of life, and retail offerings. The community survey was completed by 1,394 residents. The exceptionally large number of responses to the community survey is a very positive sign that reflects a high level of participation in this project from local stakeholders.

The survey remained online for a four-week period from October 1, 2012 through October 29, 2012. The following pages provide a detailed breakdown of results from the survey.

COMMUNITY SURVEY:
ALL RESPONSES





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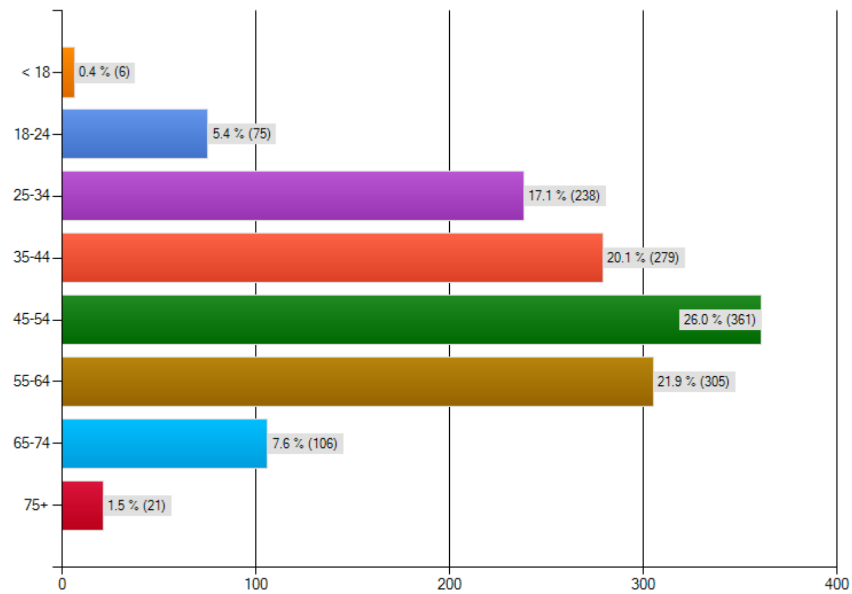
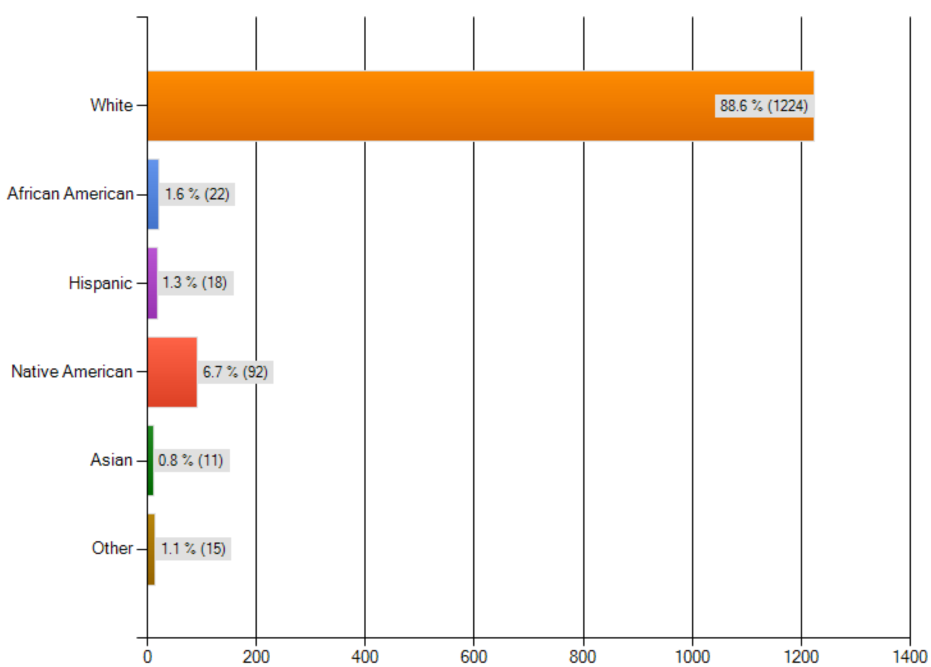
COMMUNITY SURVEY:
ALL RESPONSES

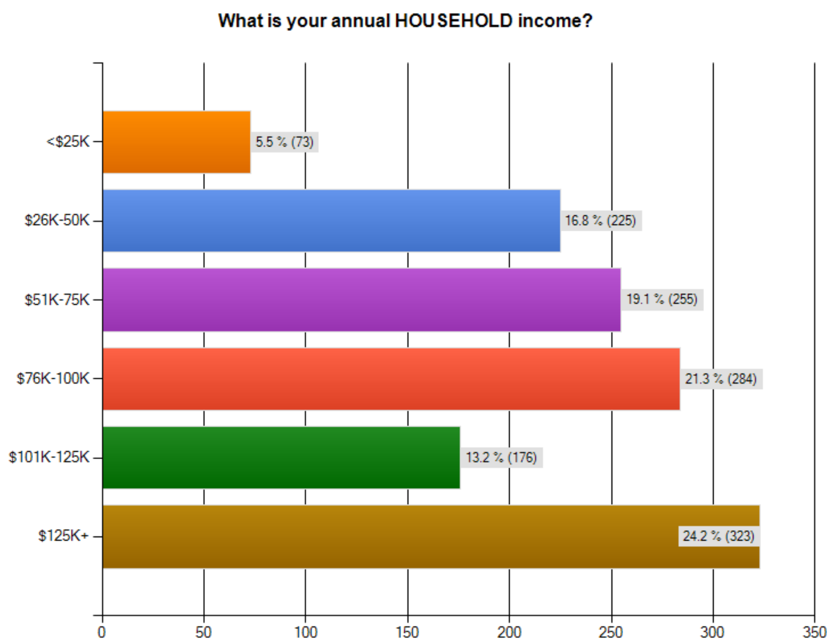
What is your age?

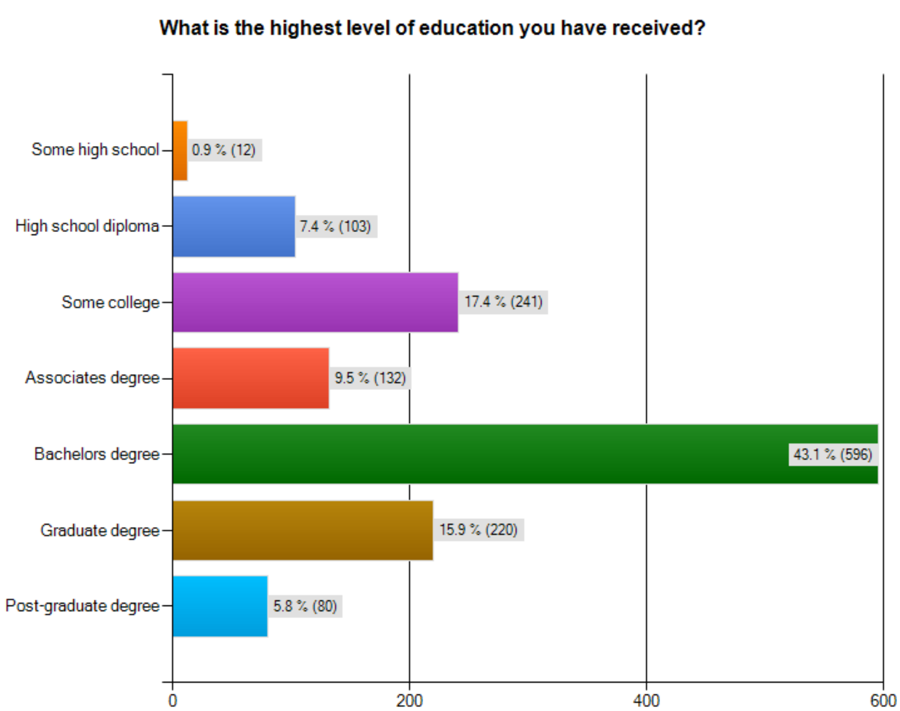


What is your ethnicity?



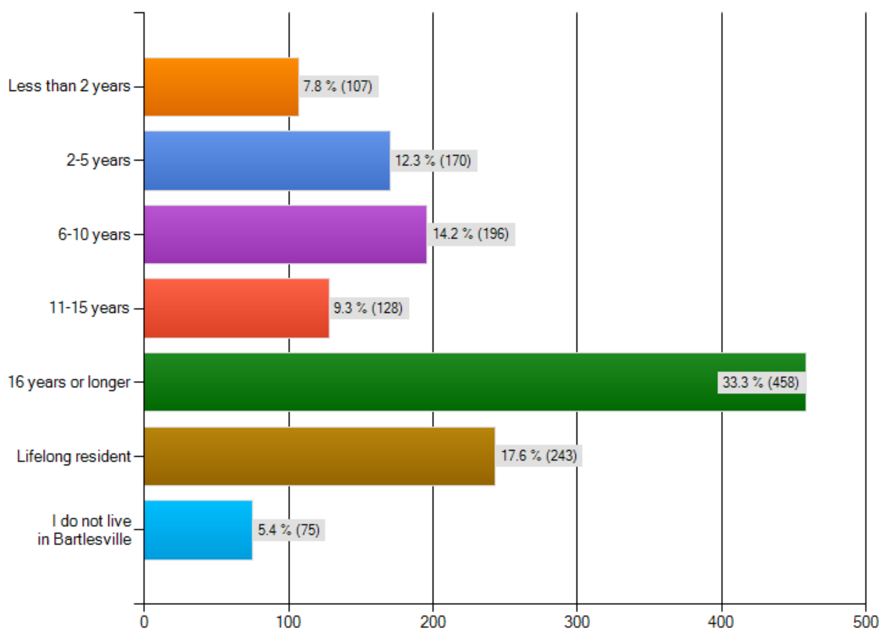
COMMUNITY SURVEY: ALL RESPONSES



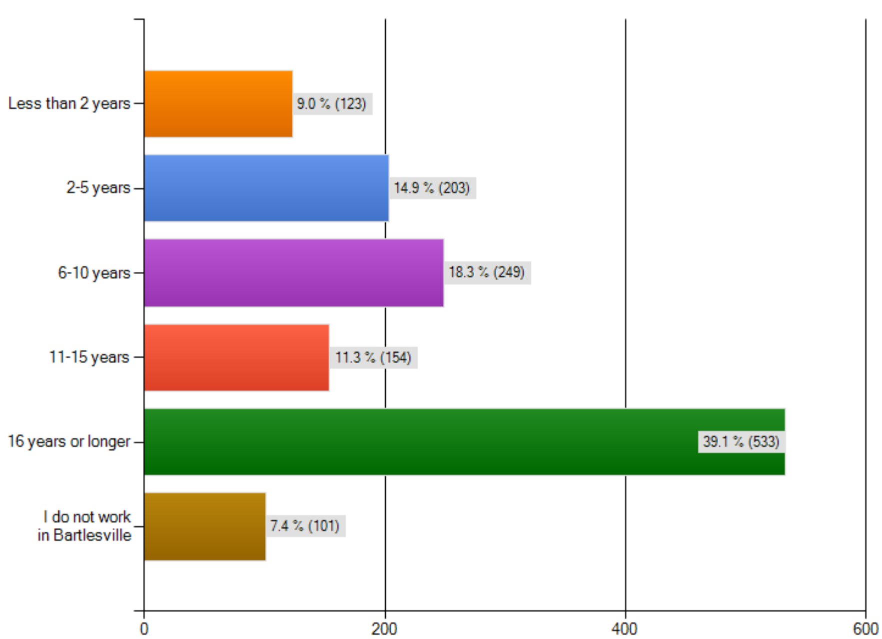


COMMUNITY SURVEY: ALL RESPONSES

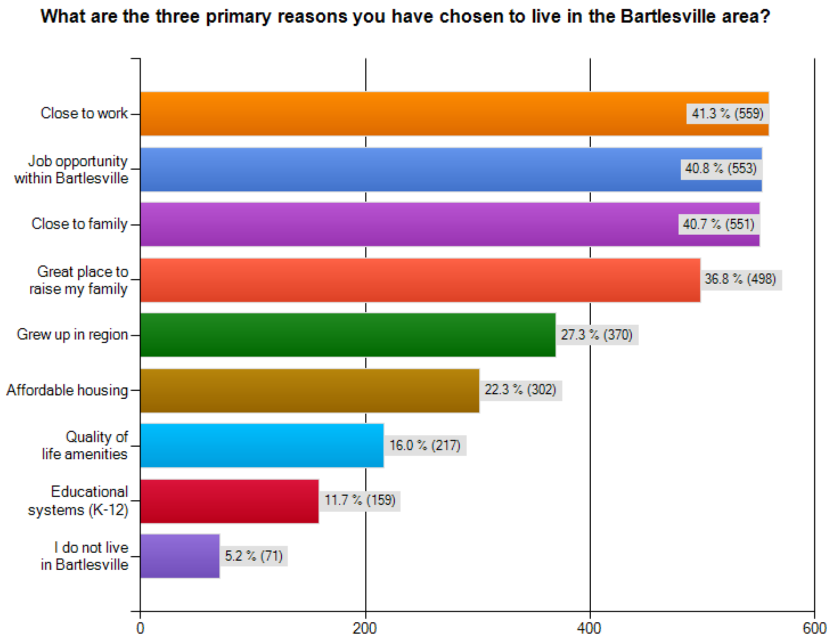
How long have you lived in Bartlesville?

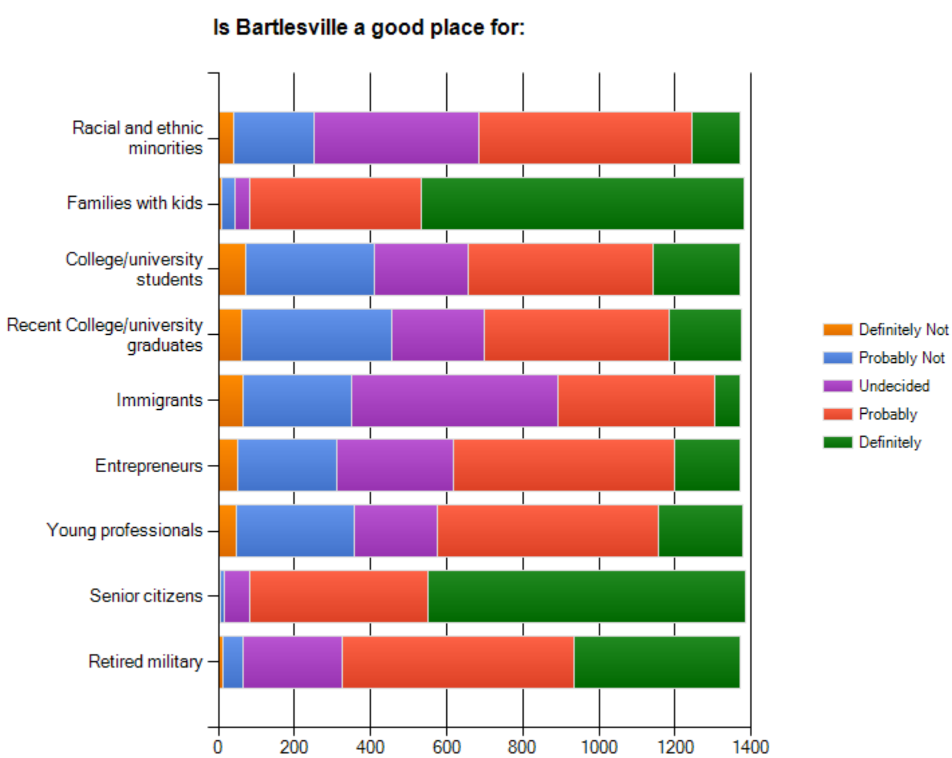


How long have you worked in Bartlesville?



COMMUNITY SURVEY:
ALL RESPONSES





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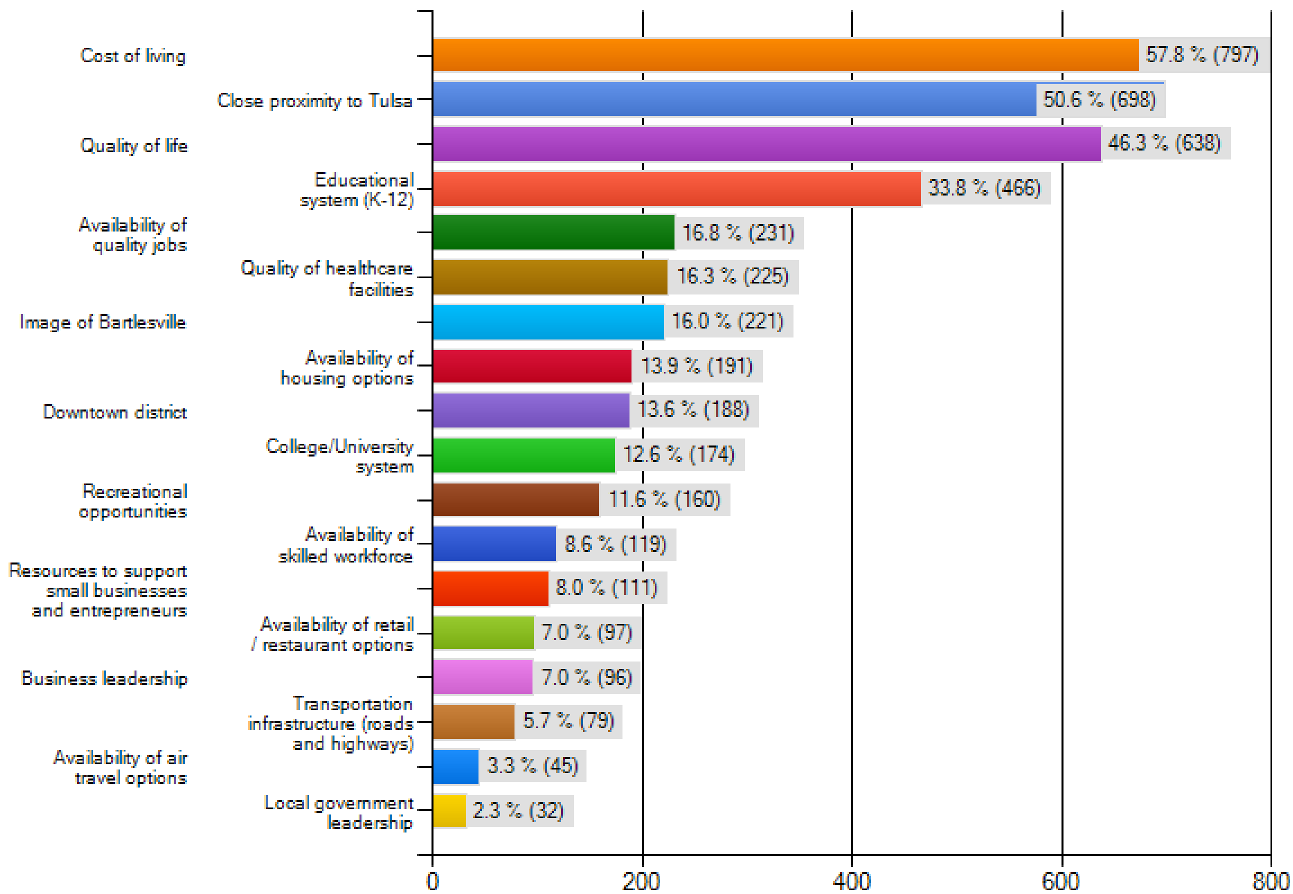
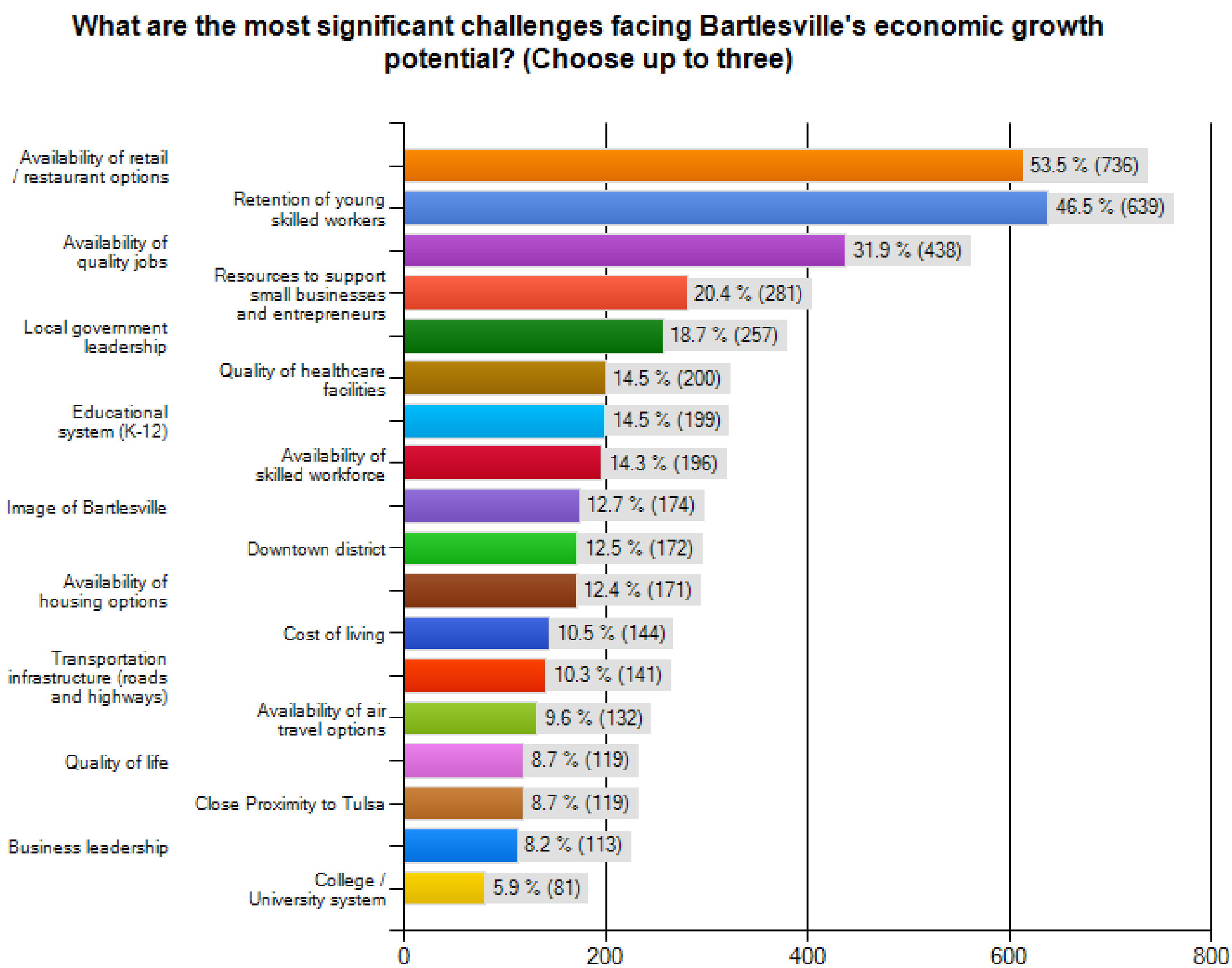
COMMUNITY SURVEY: ALL RESPONSES

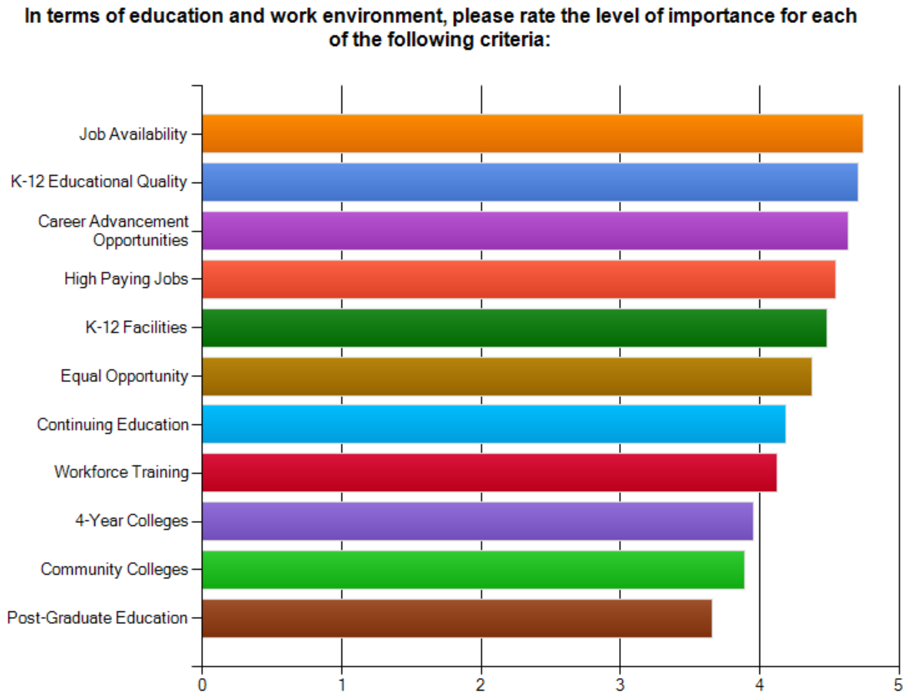
What are Bartlesville's greatest assets that can contribute to future or continued economic growth? (Choose up to three)

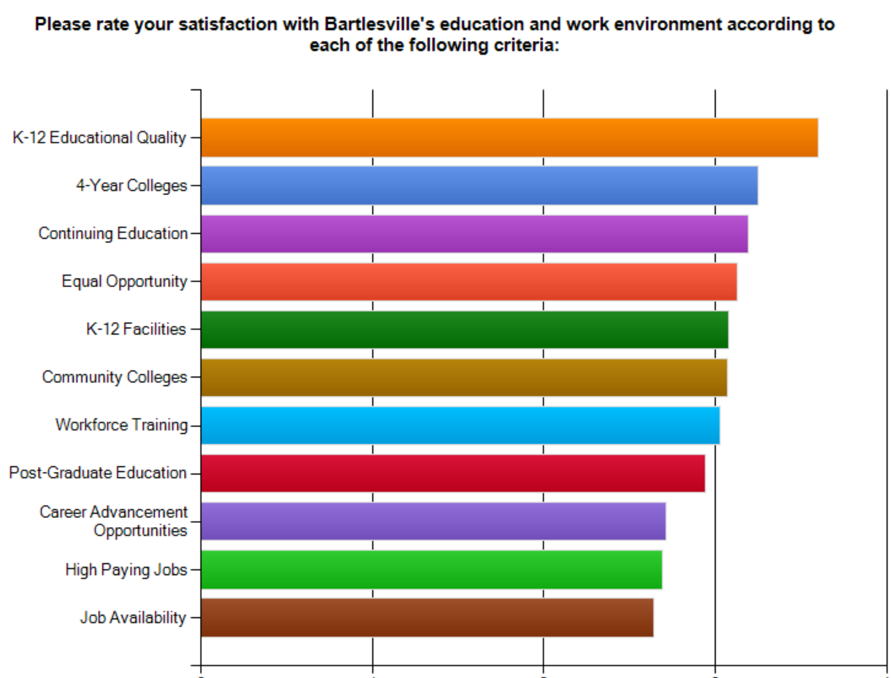


COMMUNITY SURVEY:
ALL RESPONSES

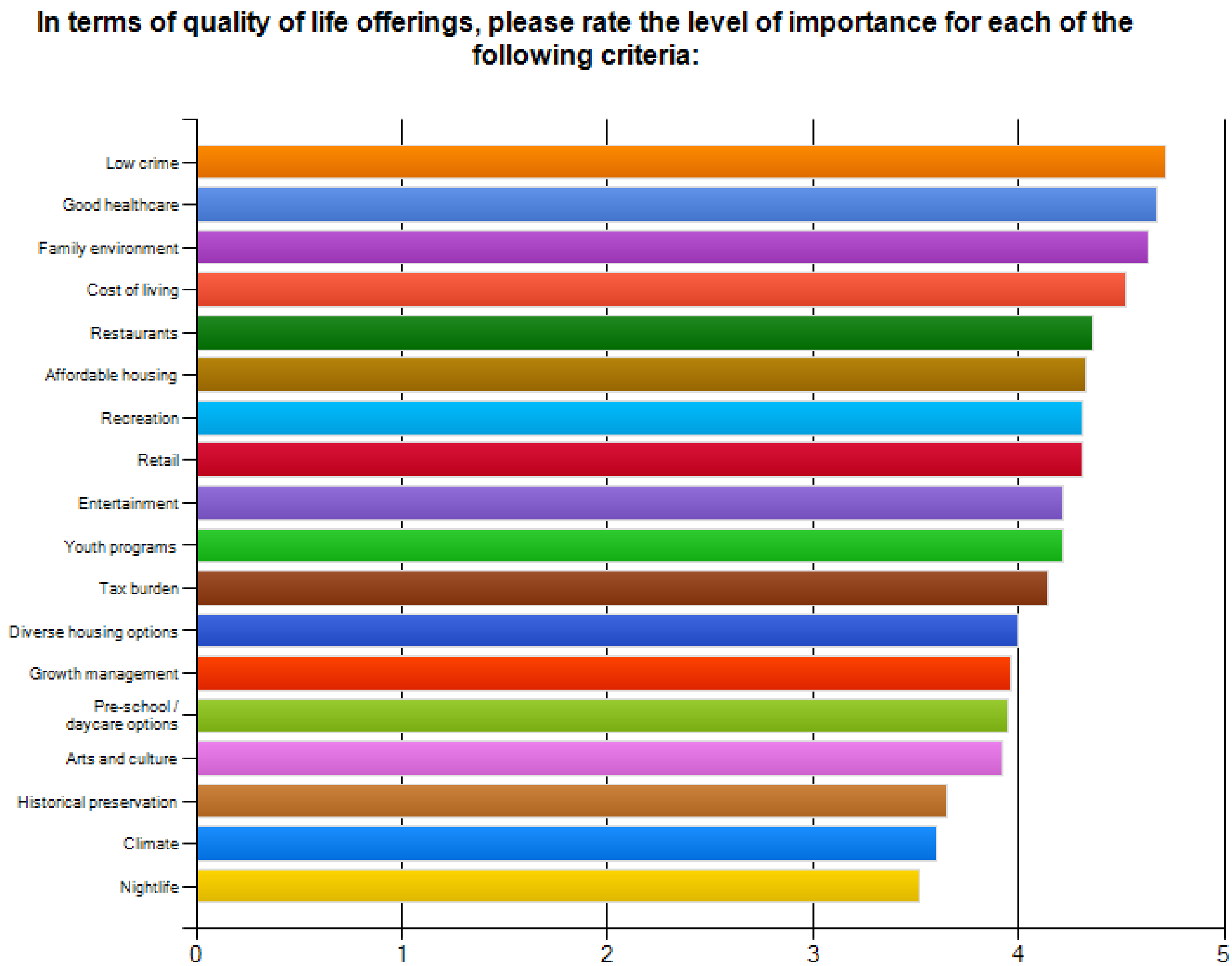


COMMUNITY SURVEY: ALL RESPONSES





COMMUNITY SURVEY:
ALL RESPONSES



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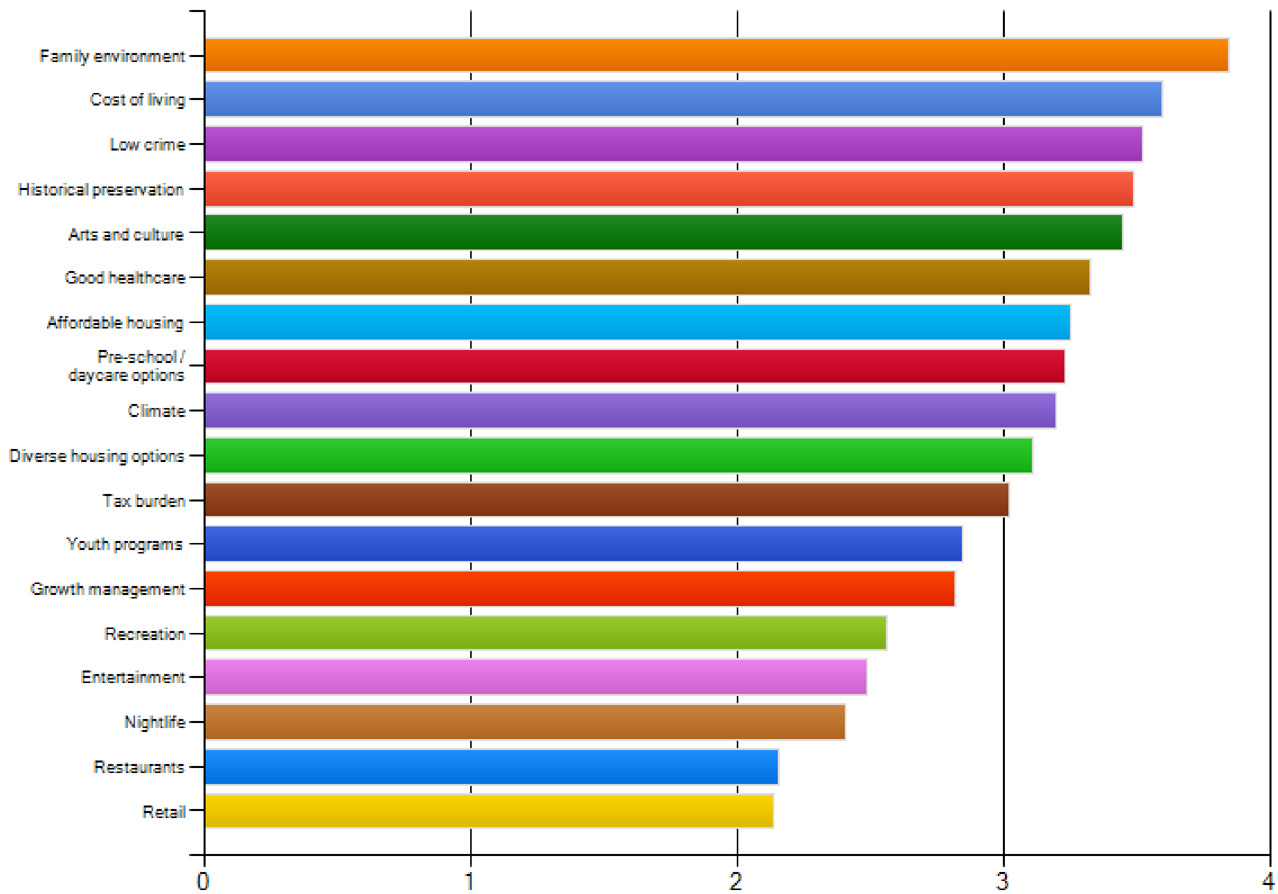
COMMUNITY SURVEY:
ALL RESPONSES

Please rate your satisfaction with Bartlesville's quality of life offerings according to each of the following criteria:



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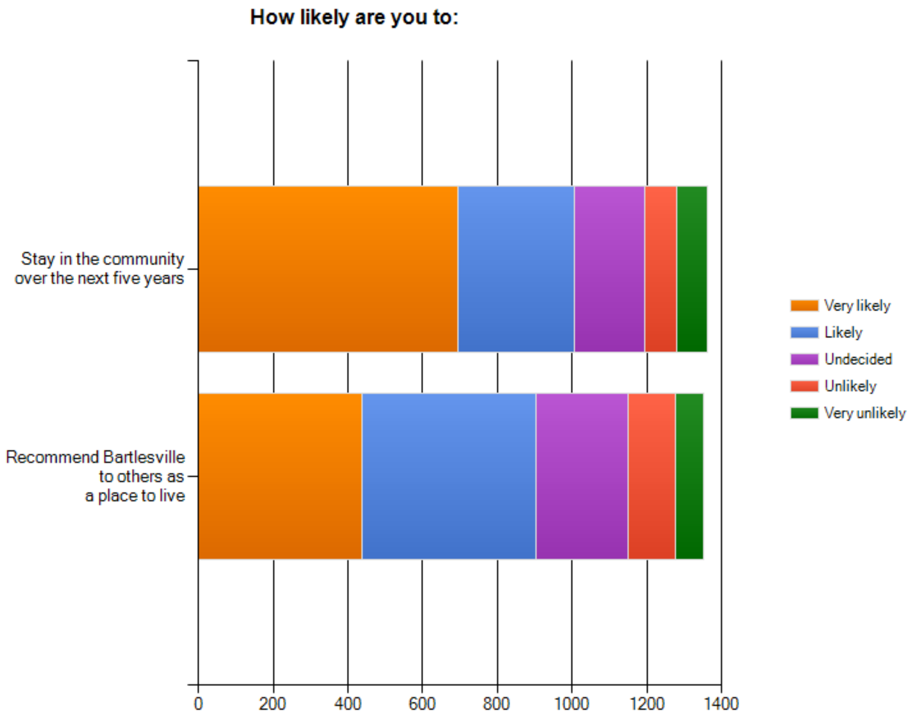
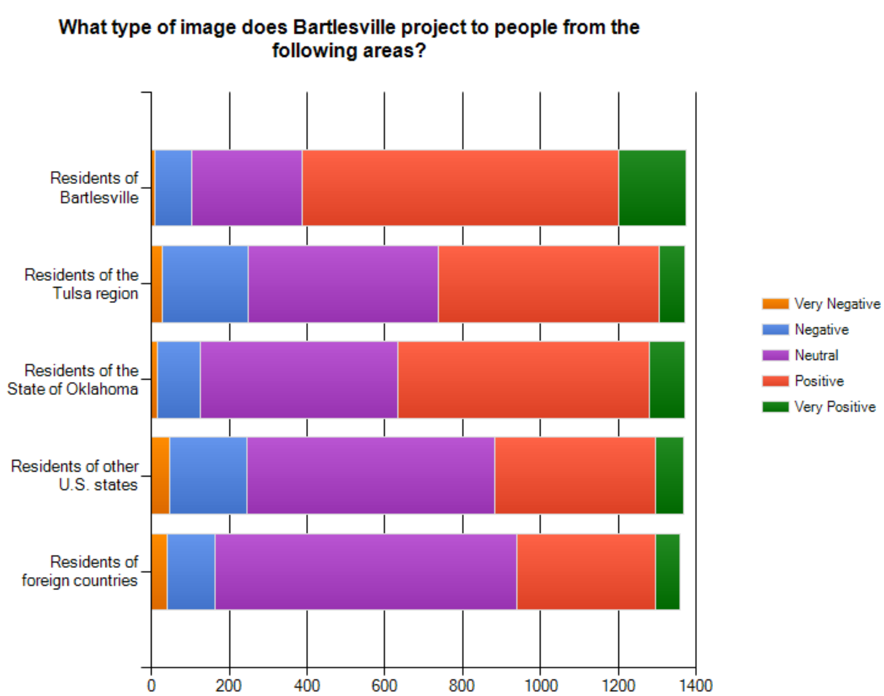
COMMUNITY SURVEY: ALL RESPONSES





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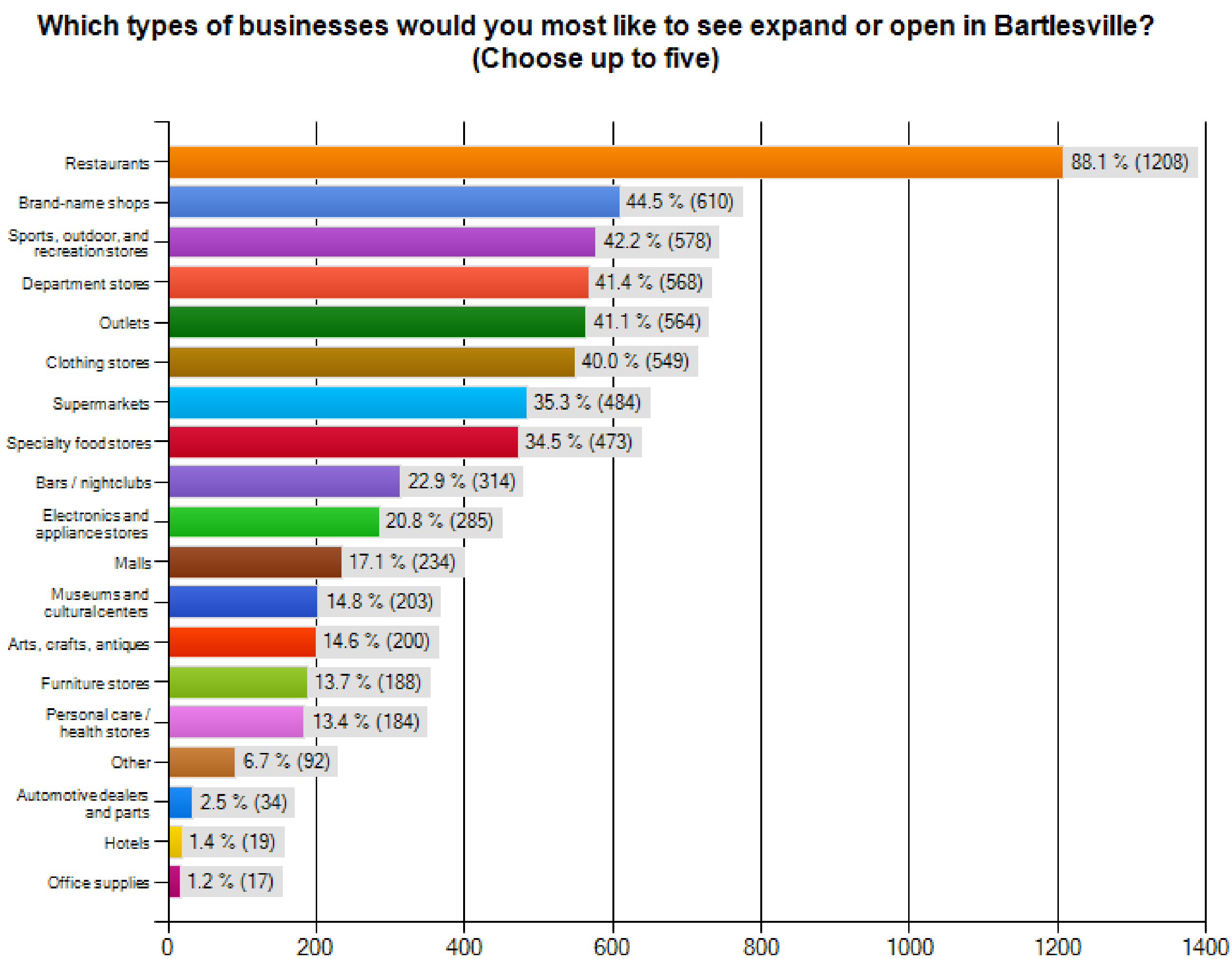
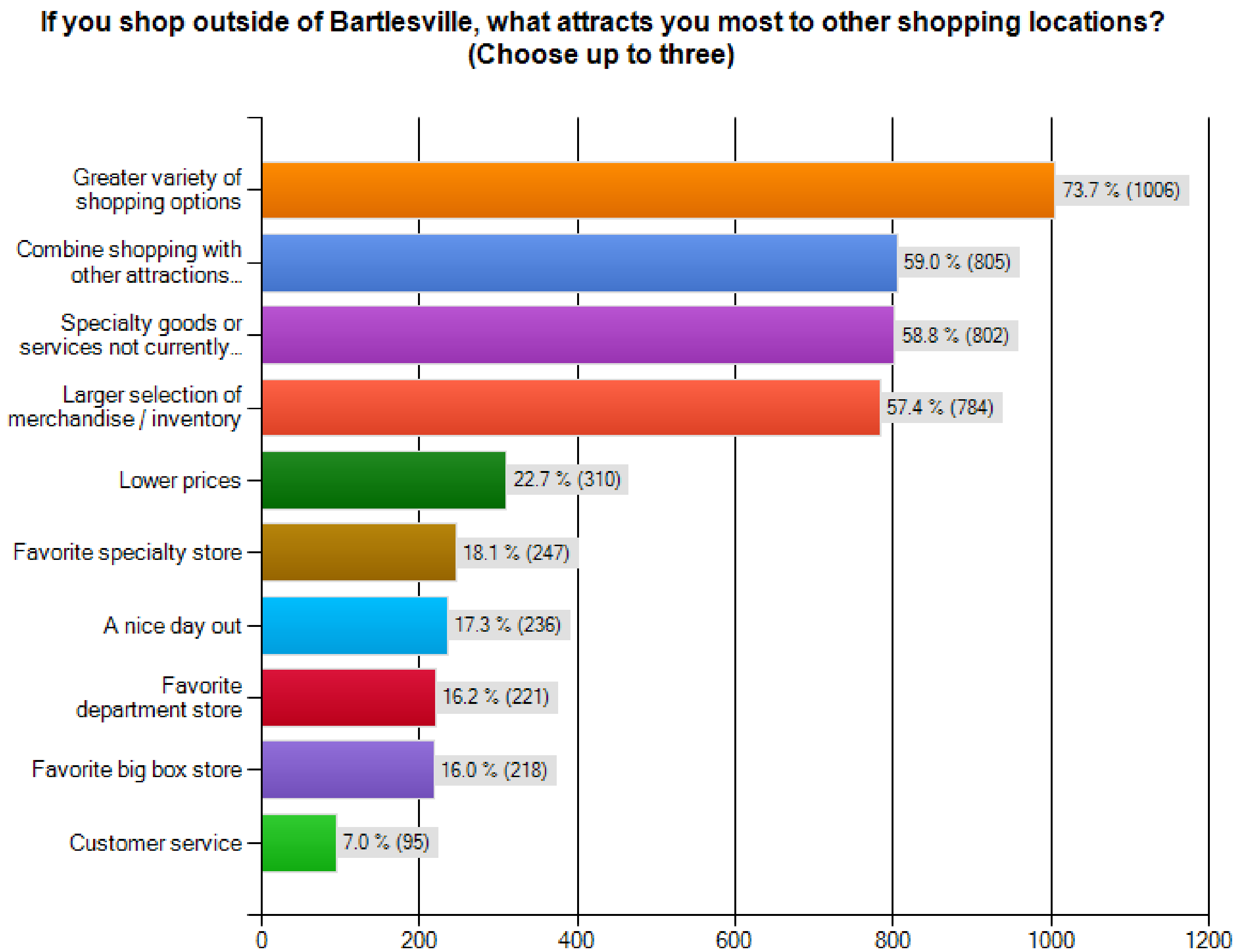
ALL RESPONSES



COMMUNITY SURVEY:
ALL RESPONSES



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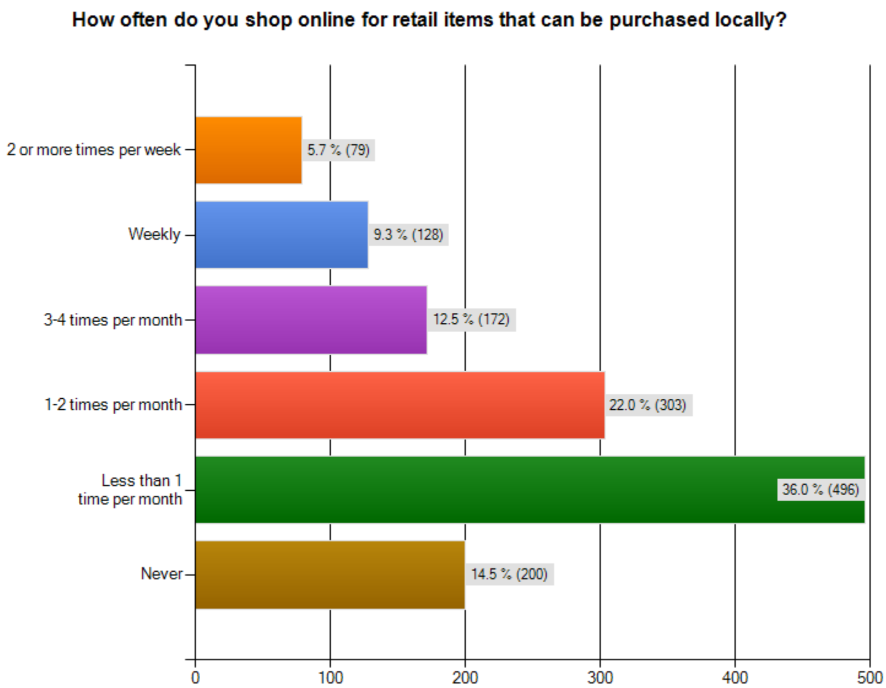
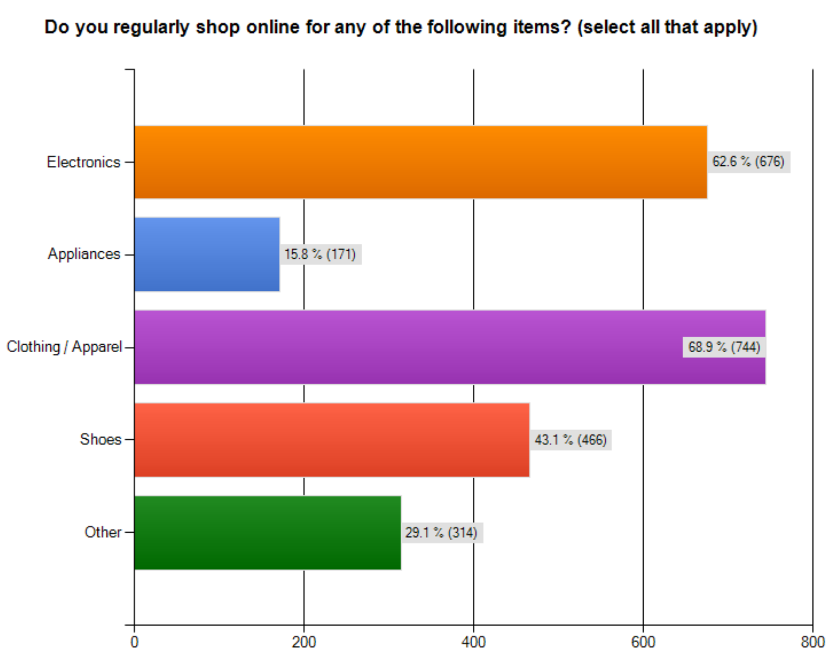
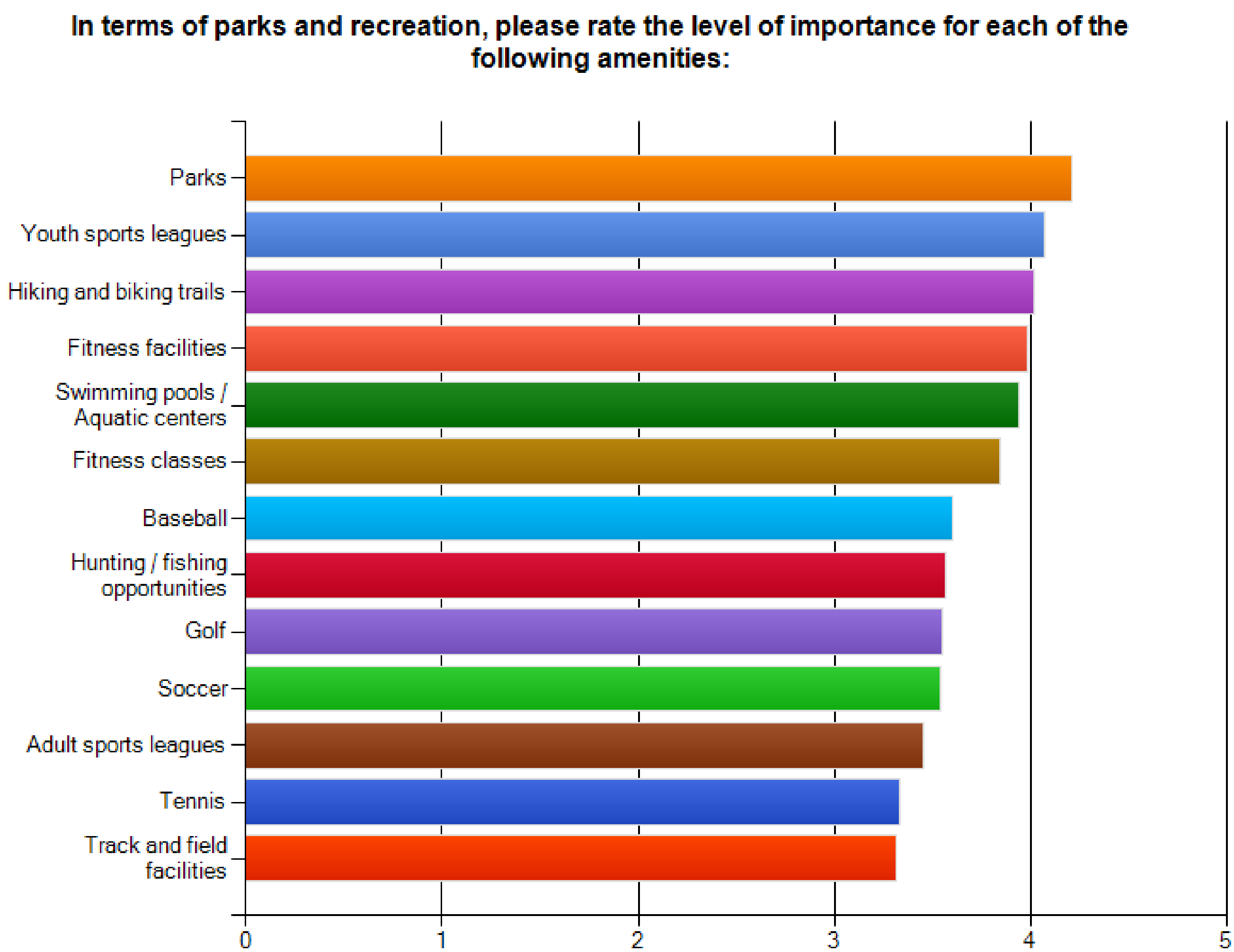
ALL RESPONSES

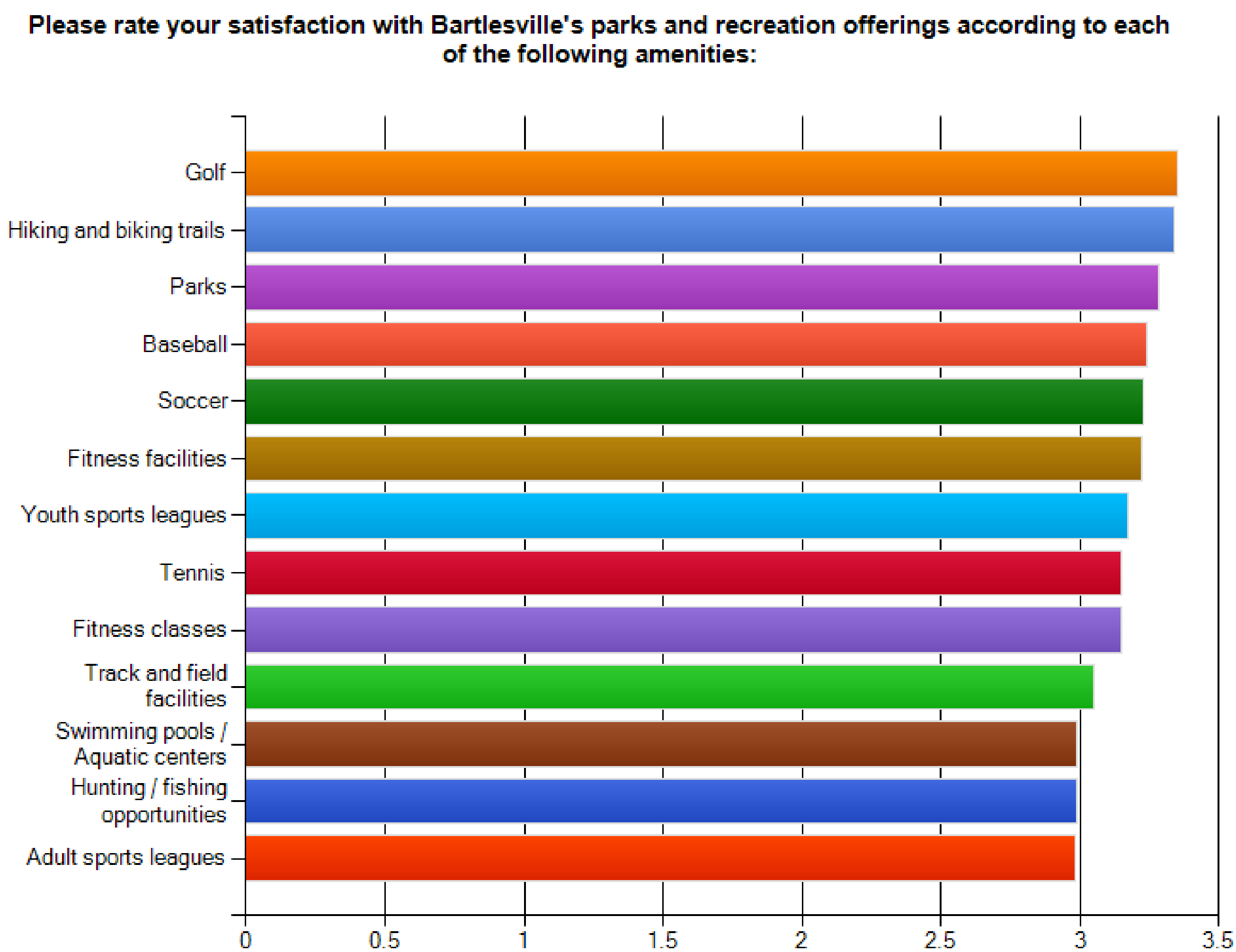




COMMUNITY SURVEY:
ALL RESPONSES



COMMUNITY SURVEY:
ALL RESPONSES



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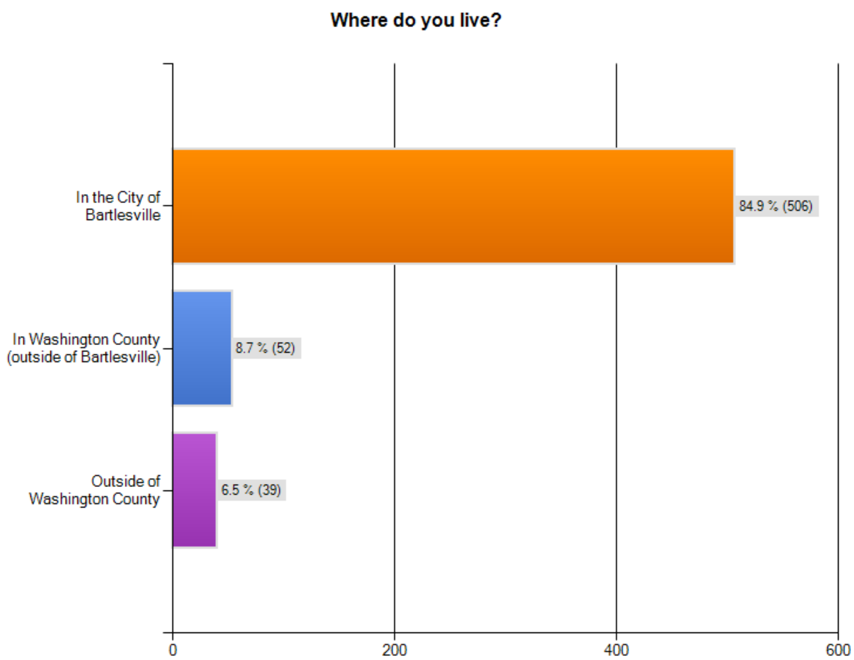
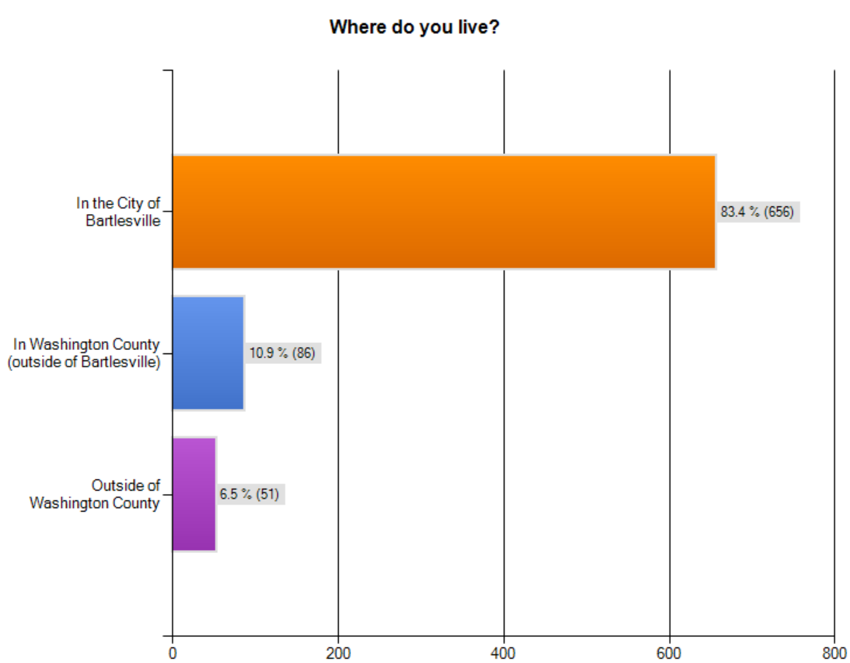
COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)

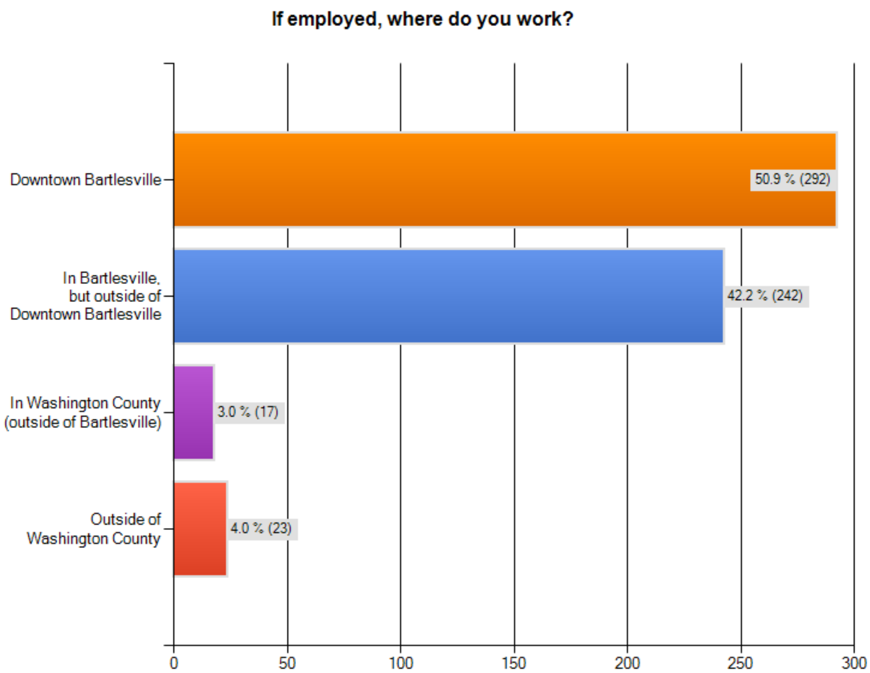


UNDER 45



OVER 45

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



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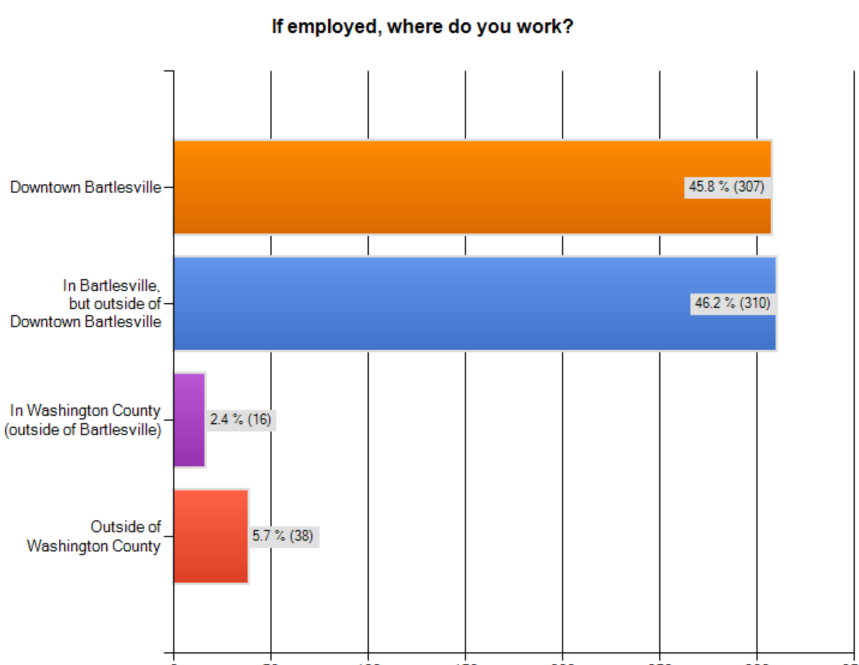

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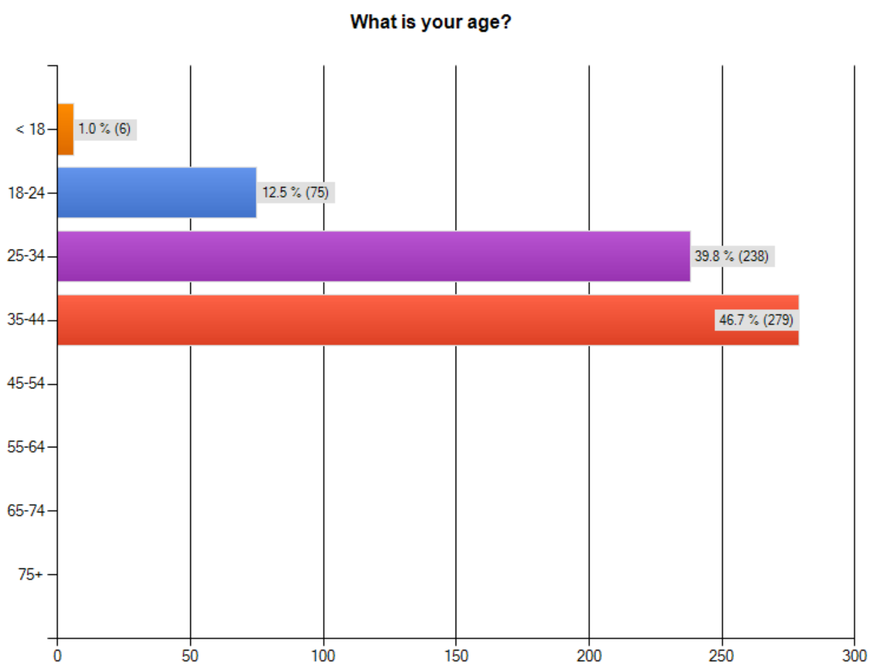
COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



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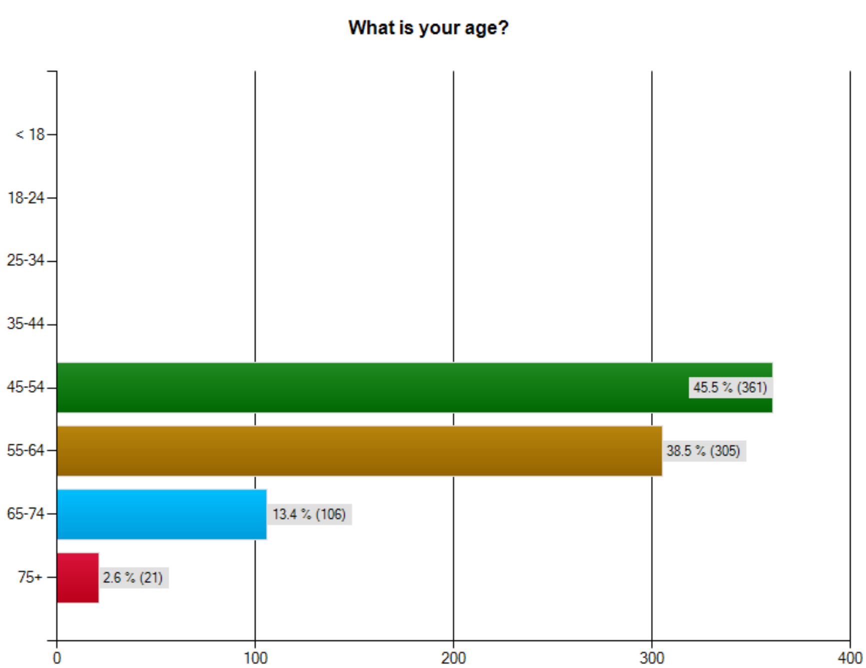

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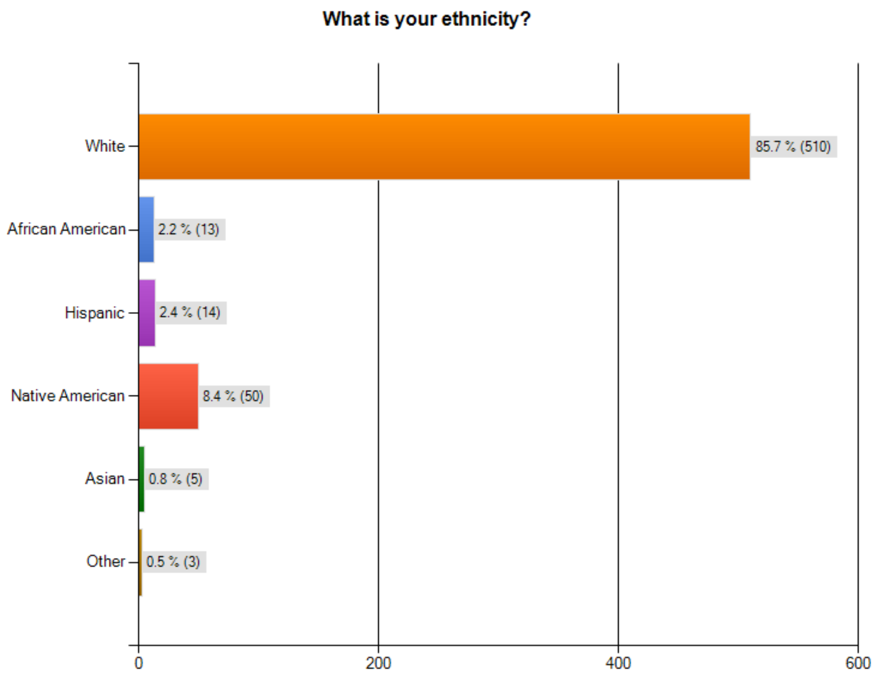
COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



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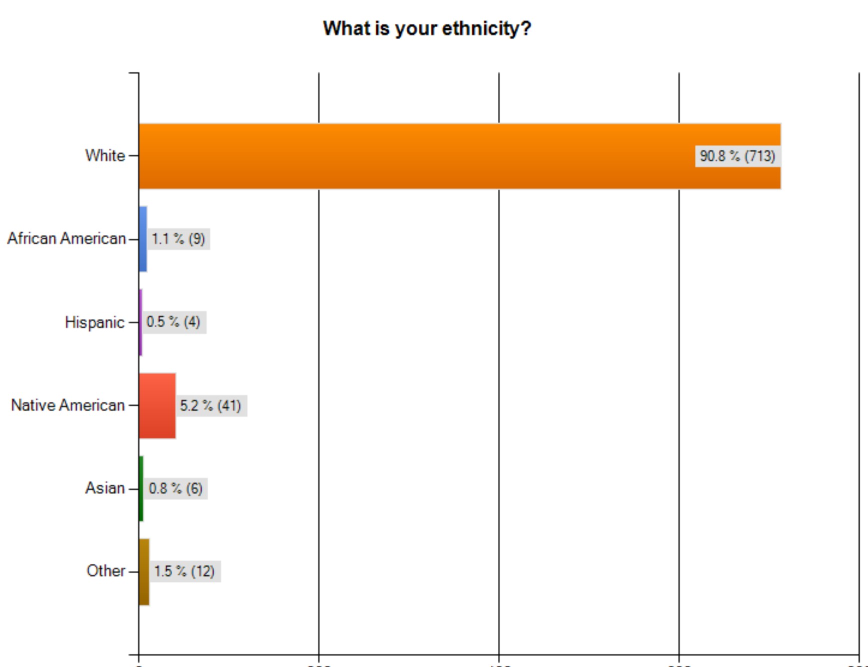
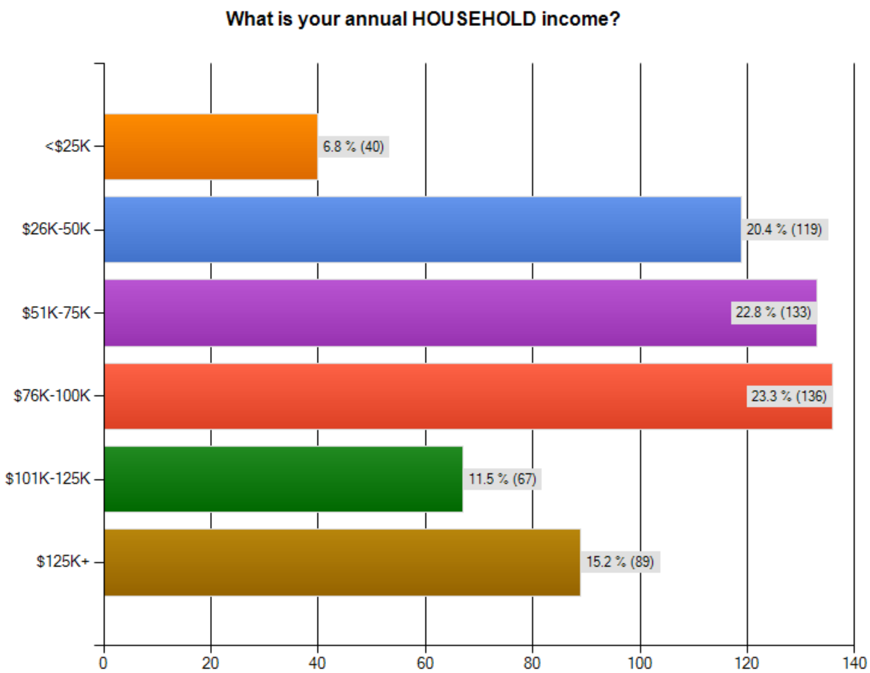


OVER 45

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



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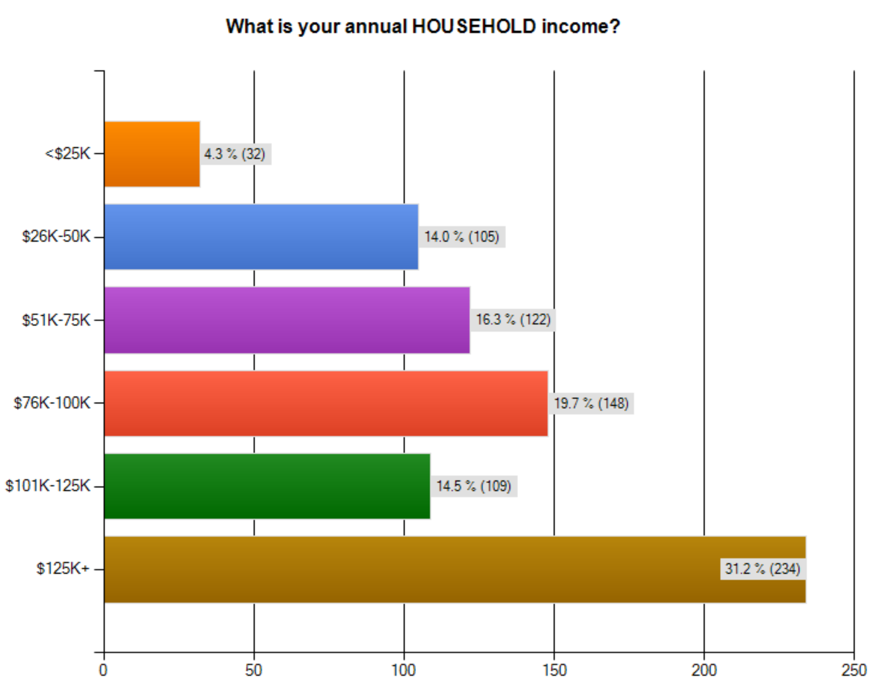
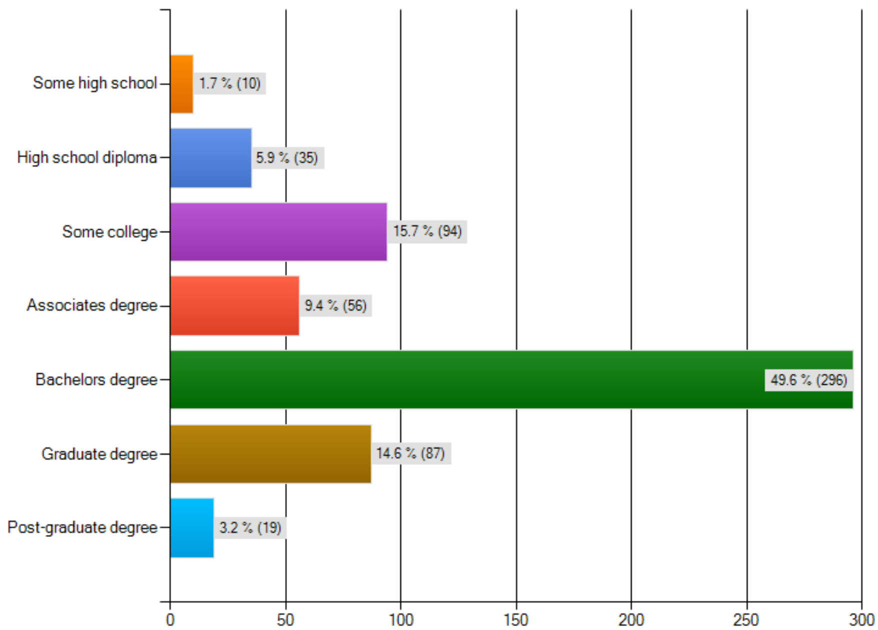


OVER 45

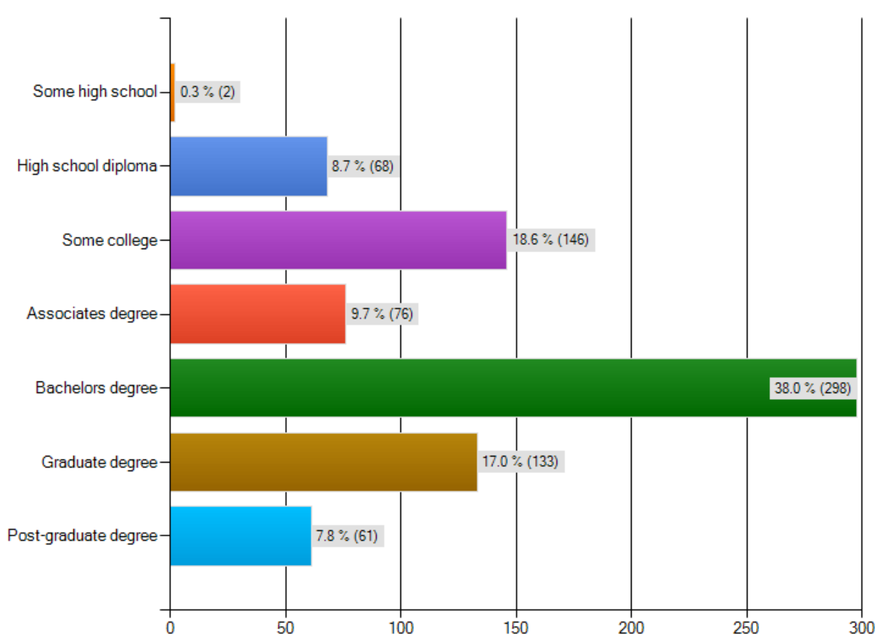
COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)

What is the highest level of education you have received?



UNDER 45

What is the highest level of education you have received?



OVER 45

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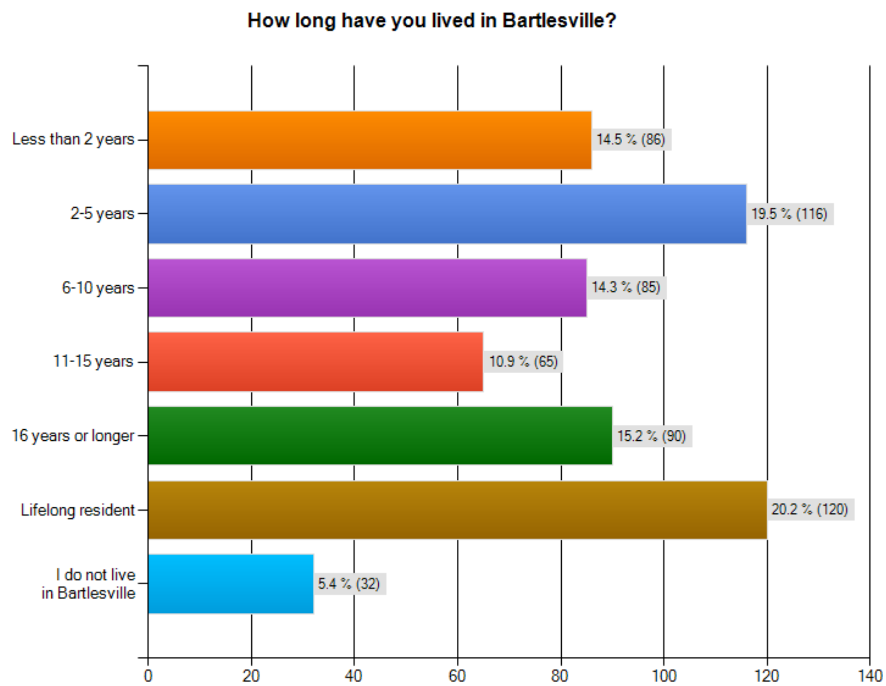
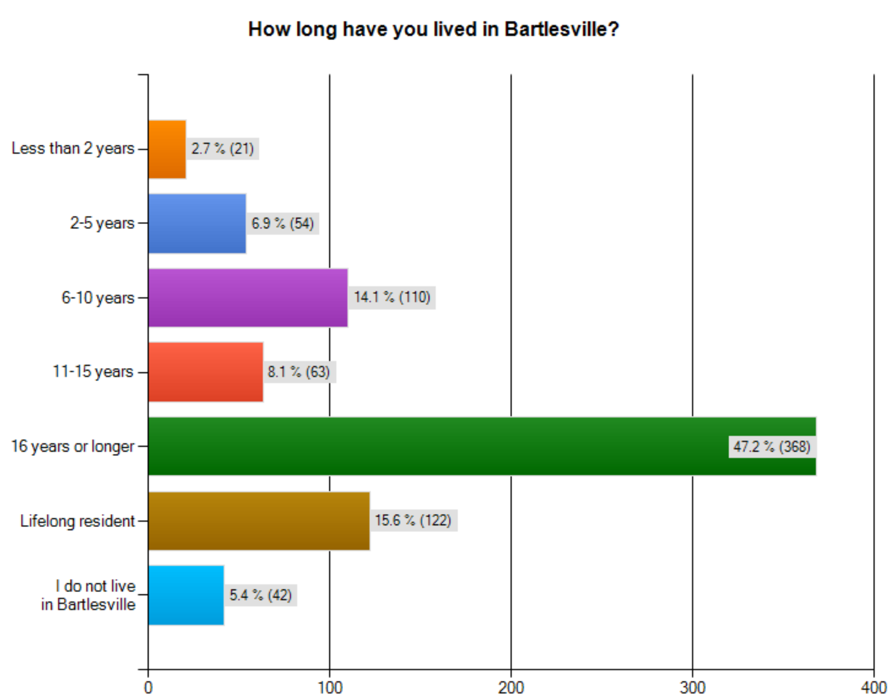
COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)

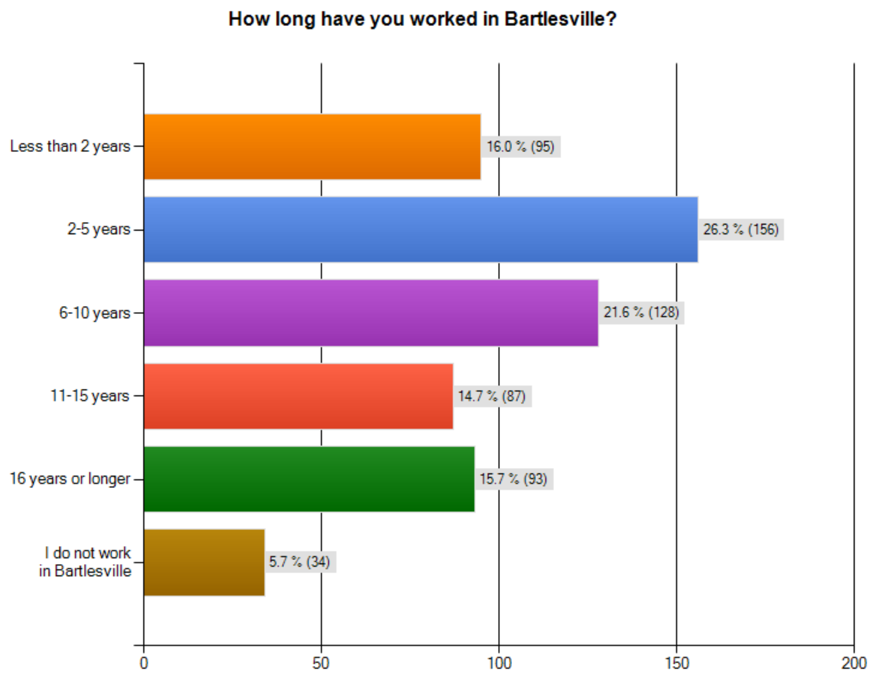


UNDER 45

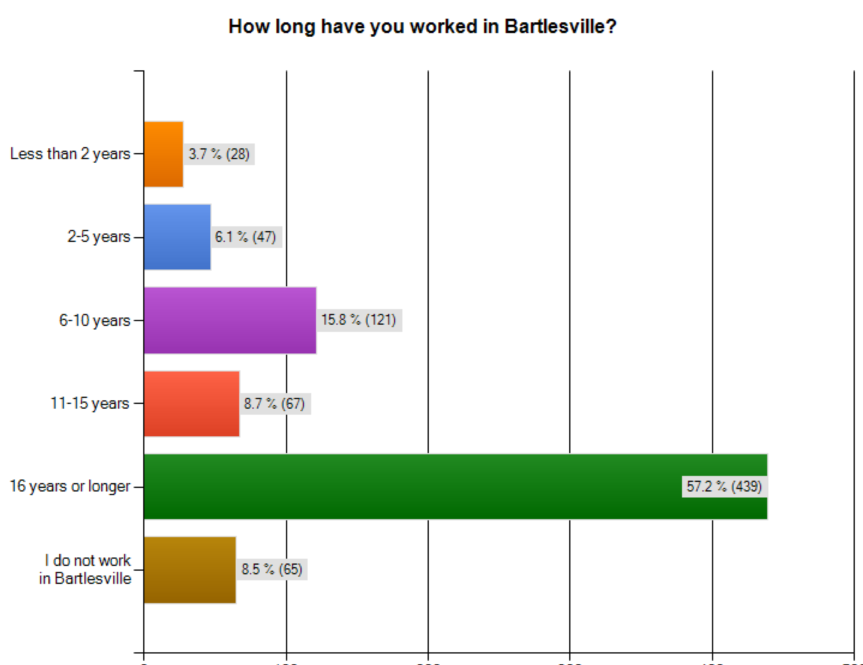


OVER 45

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)

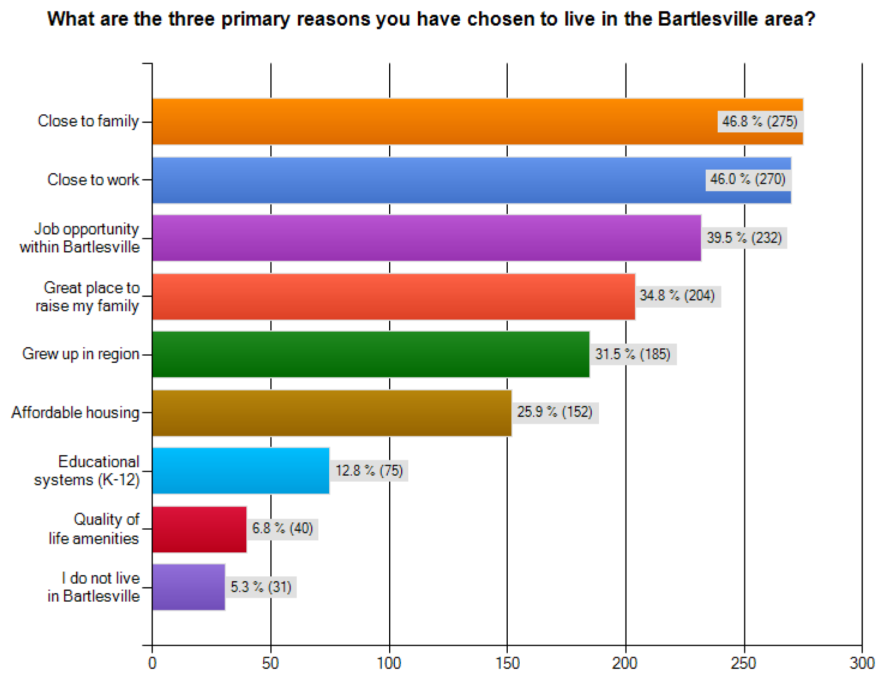


UNDER 45

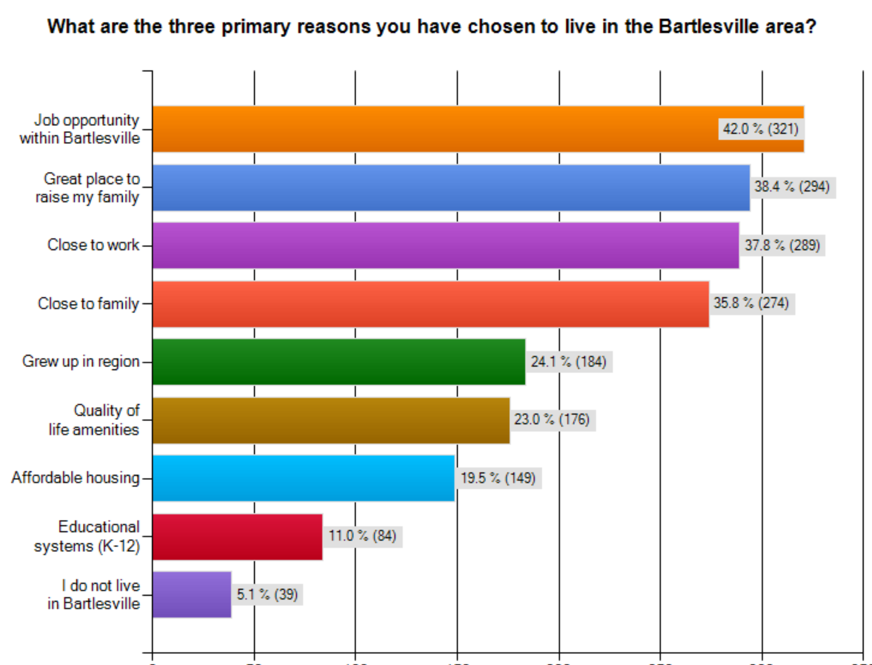


OVER 45

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



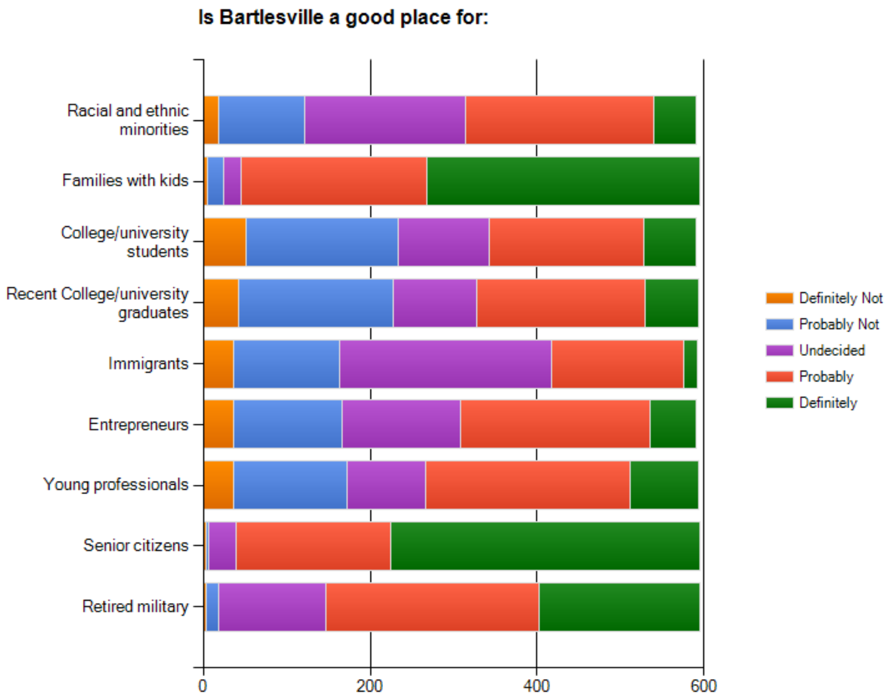
UNDER 45



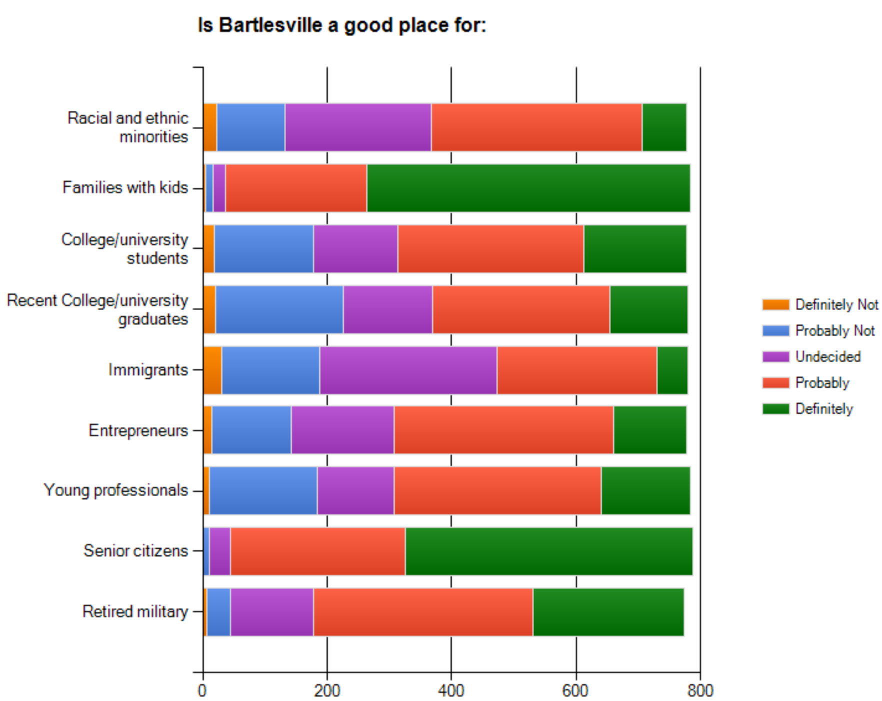
OVER 45

angeloueconomics

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



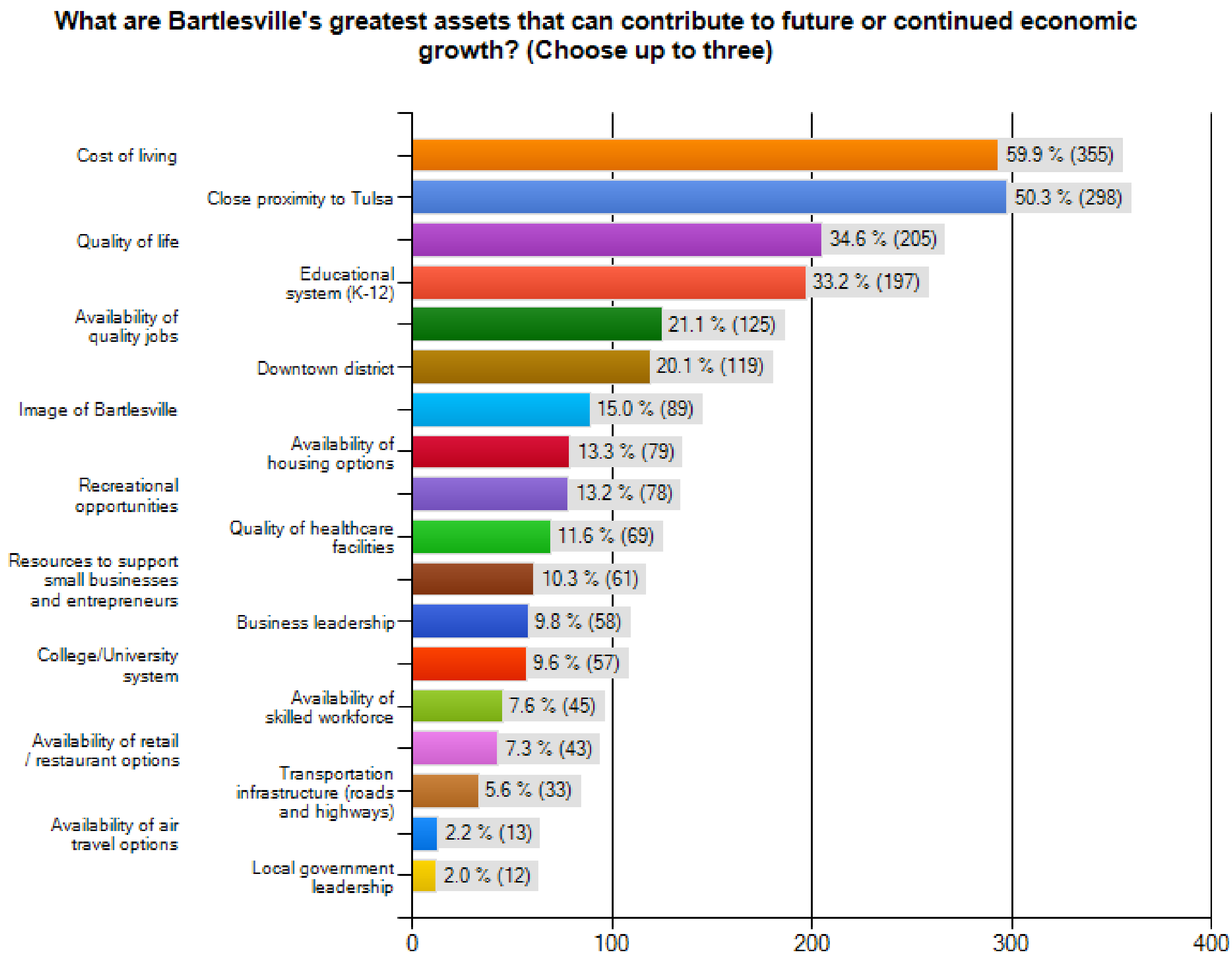
UNDER 45



OVER 45

angeloueconomics

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



UNDER 45

angeloueconomics

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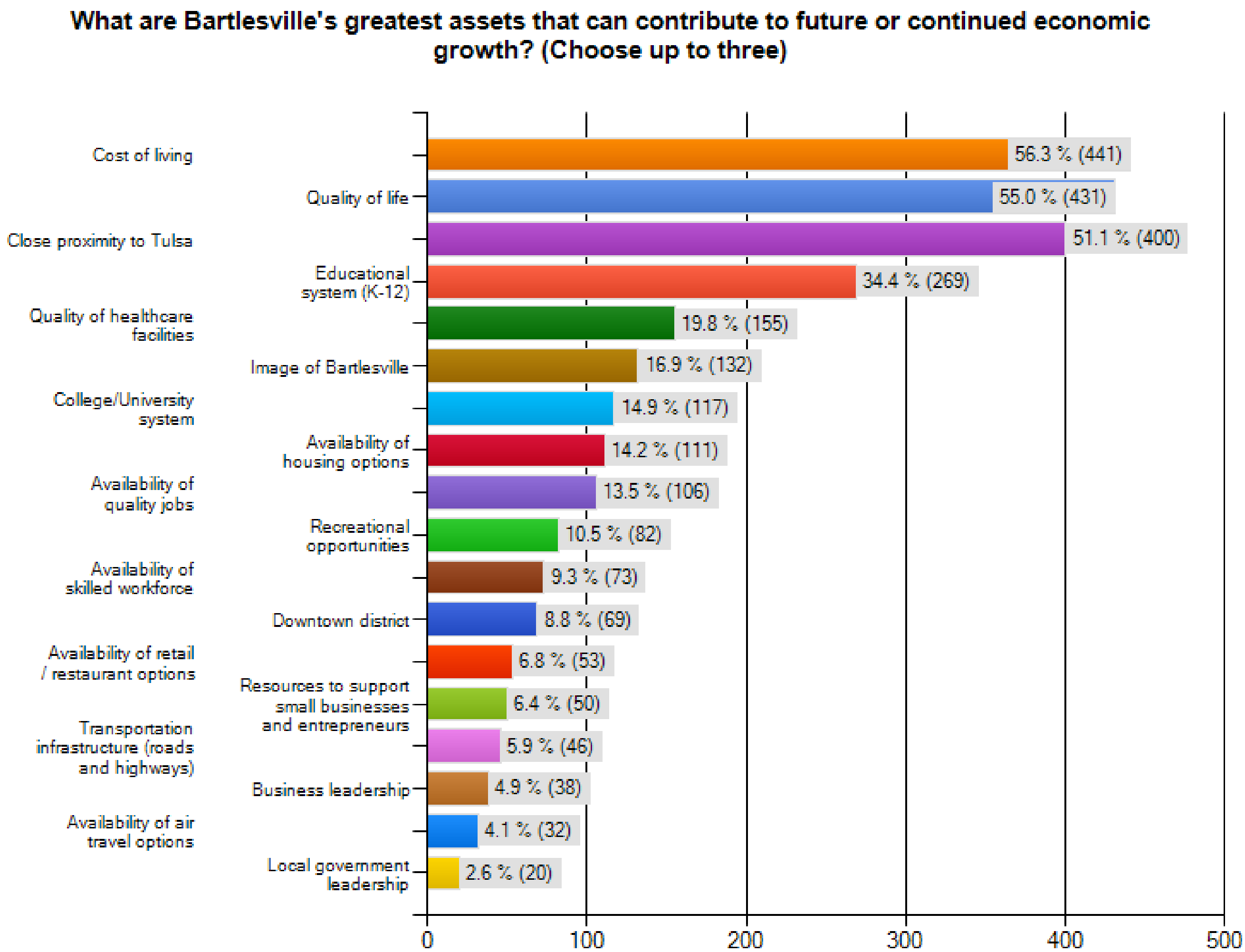
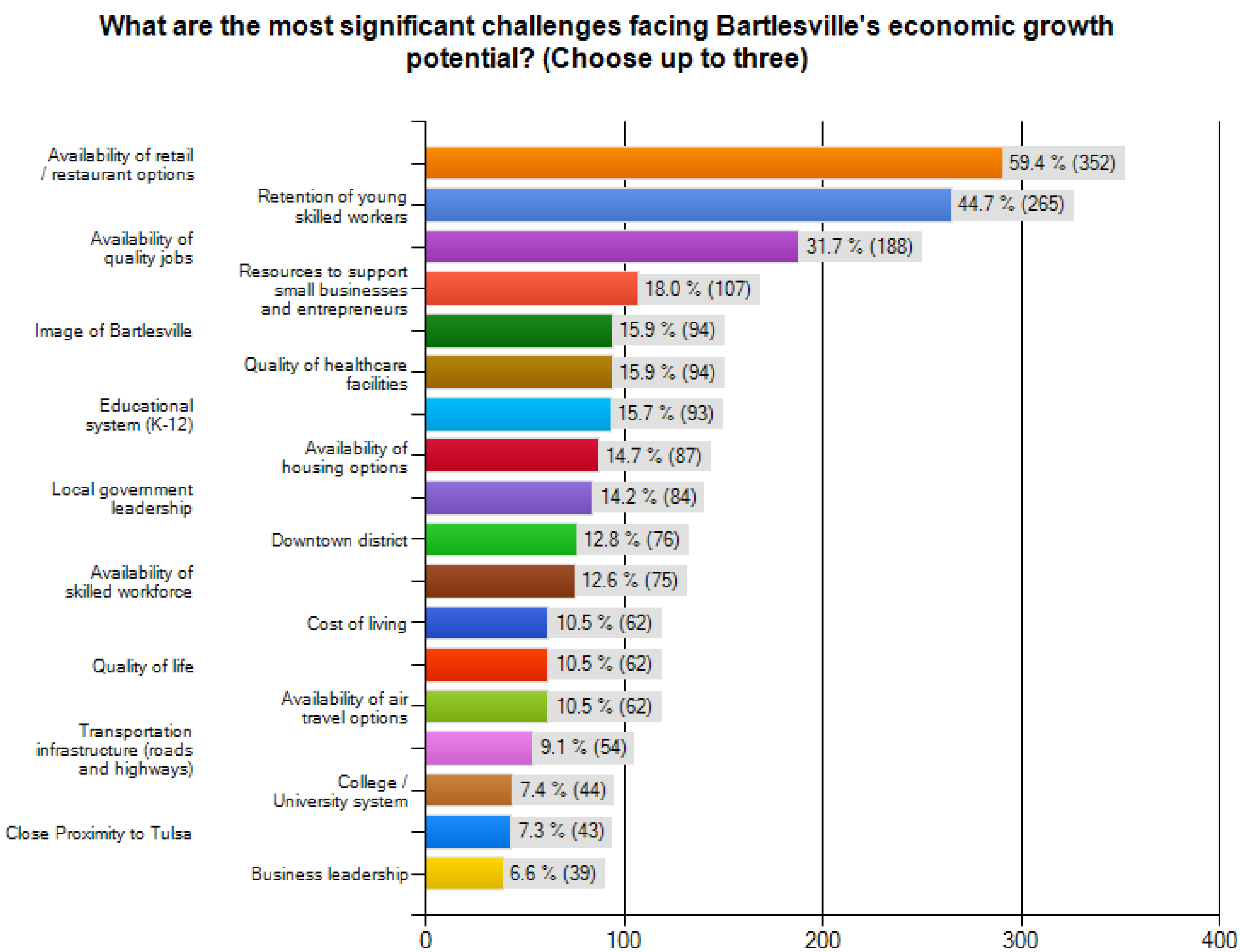
RESPONSES BY AGE (UNDER 45, OVER 45)



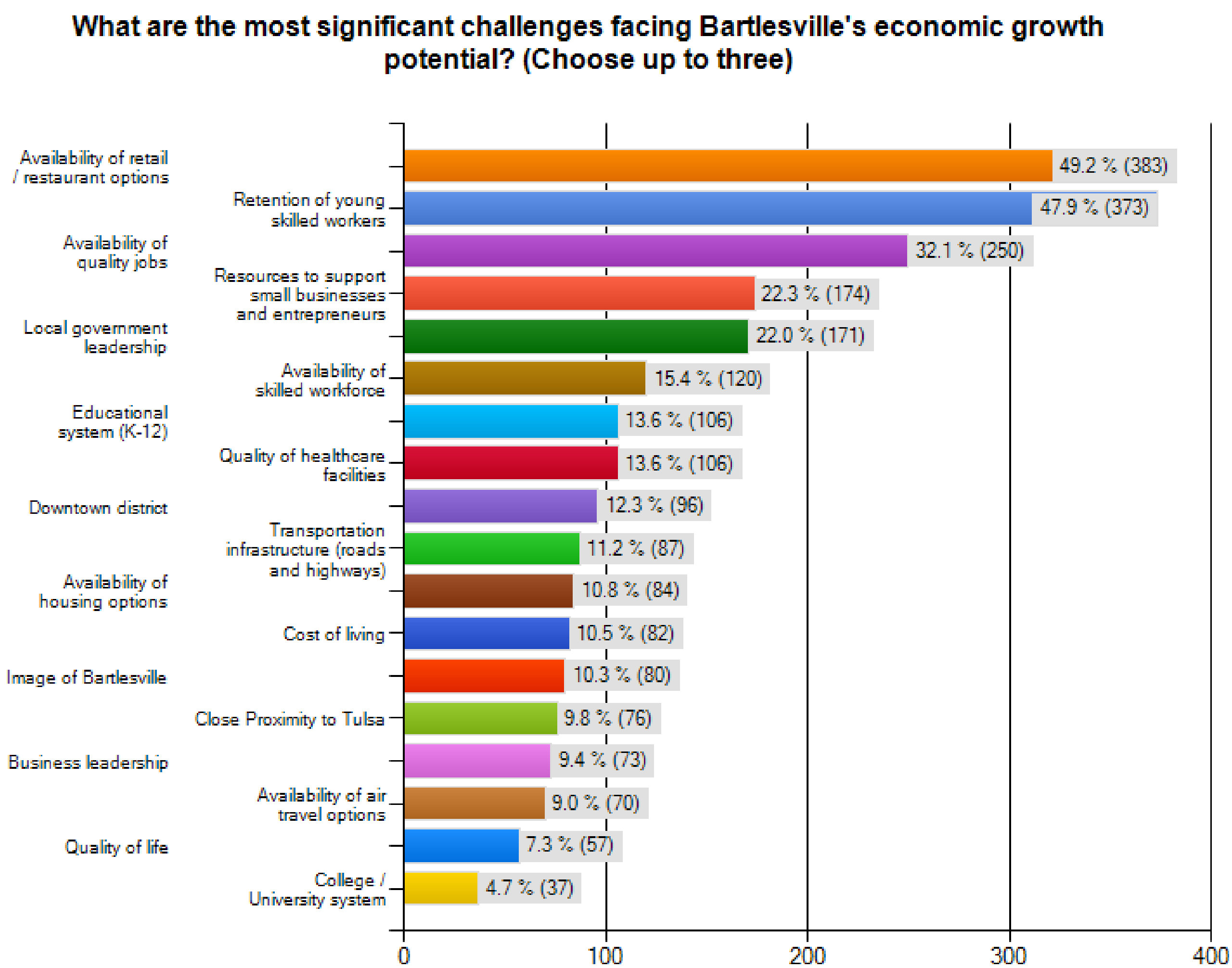
OVER 45

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



UNDER 45

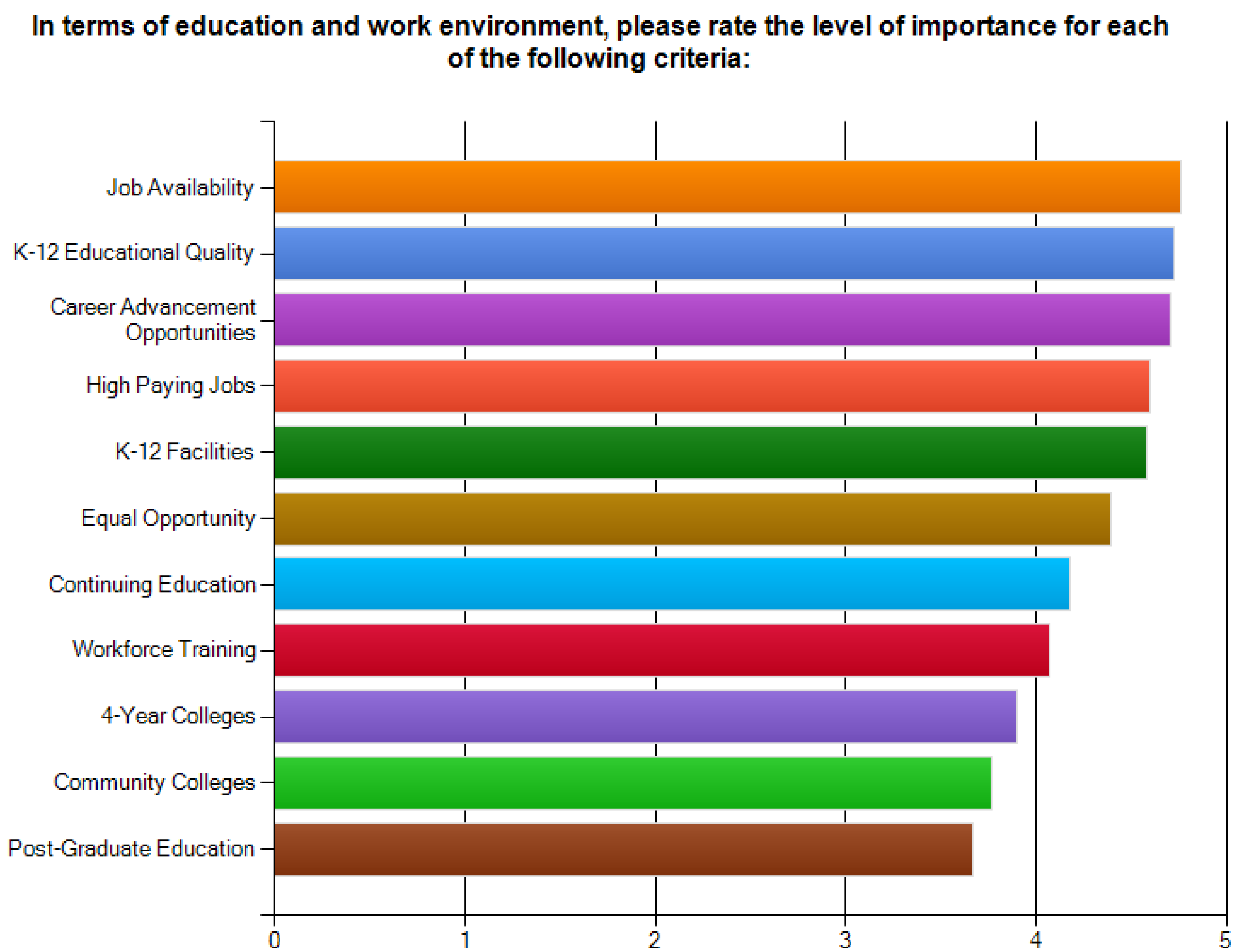
COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



OVER 45

angeloueconomics

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



UNDER 45

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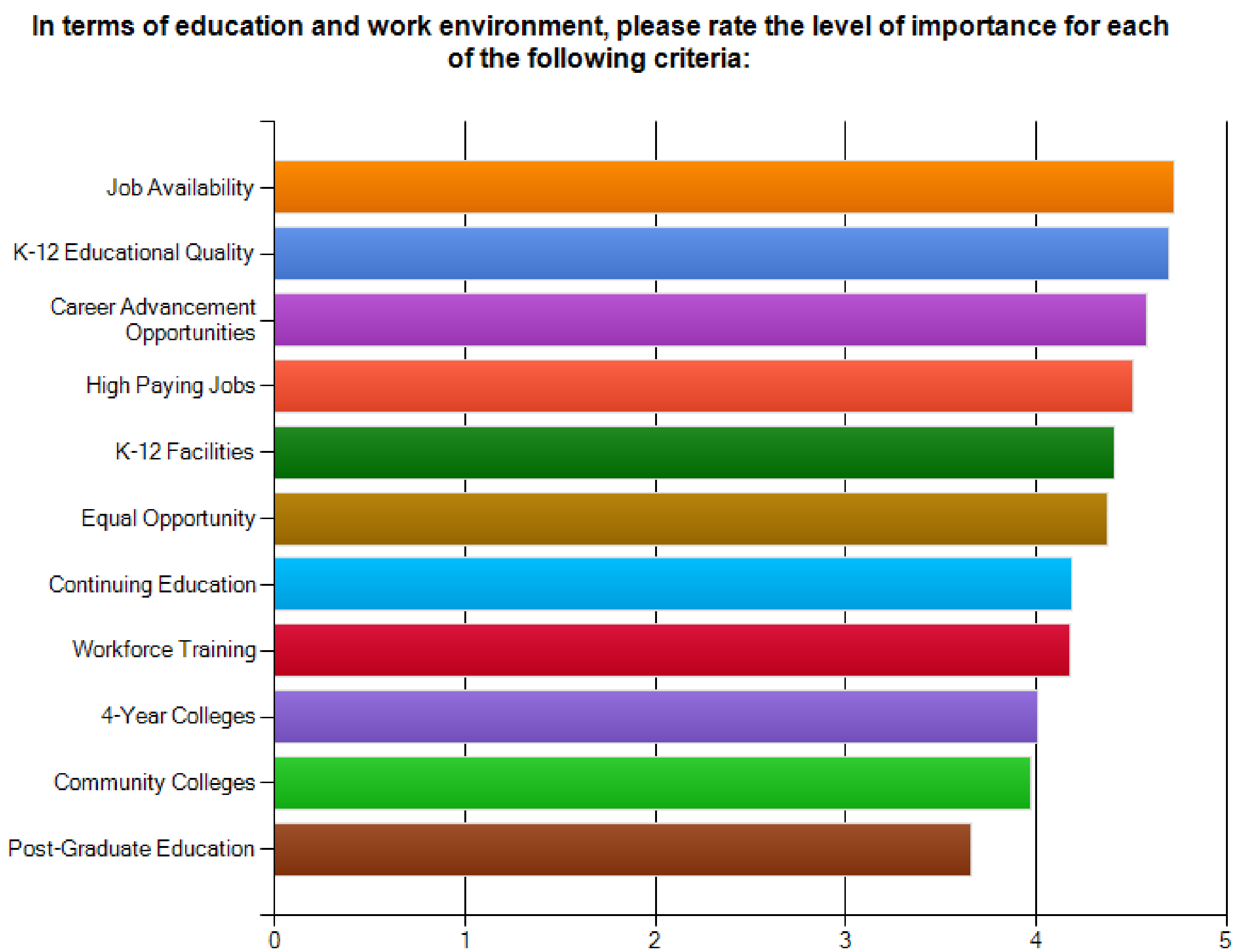
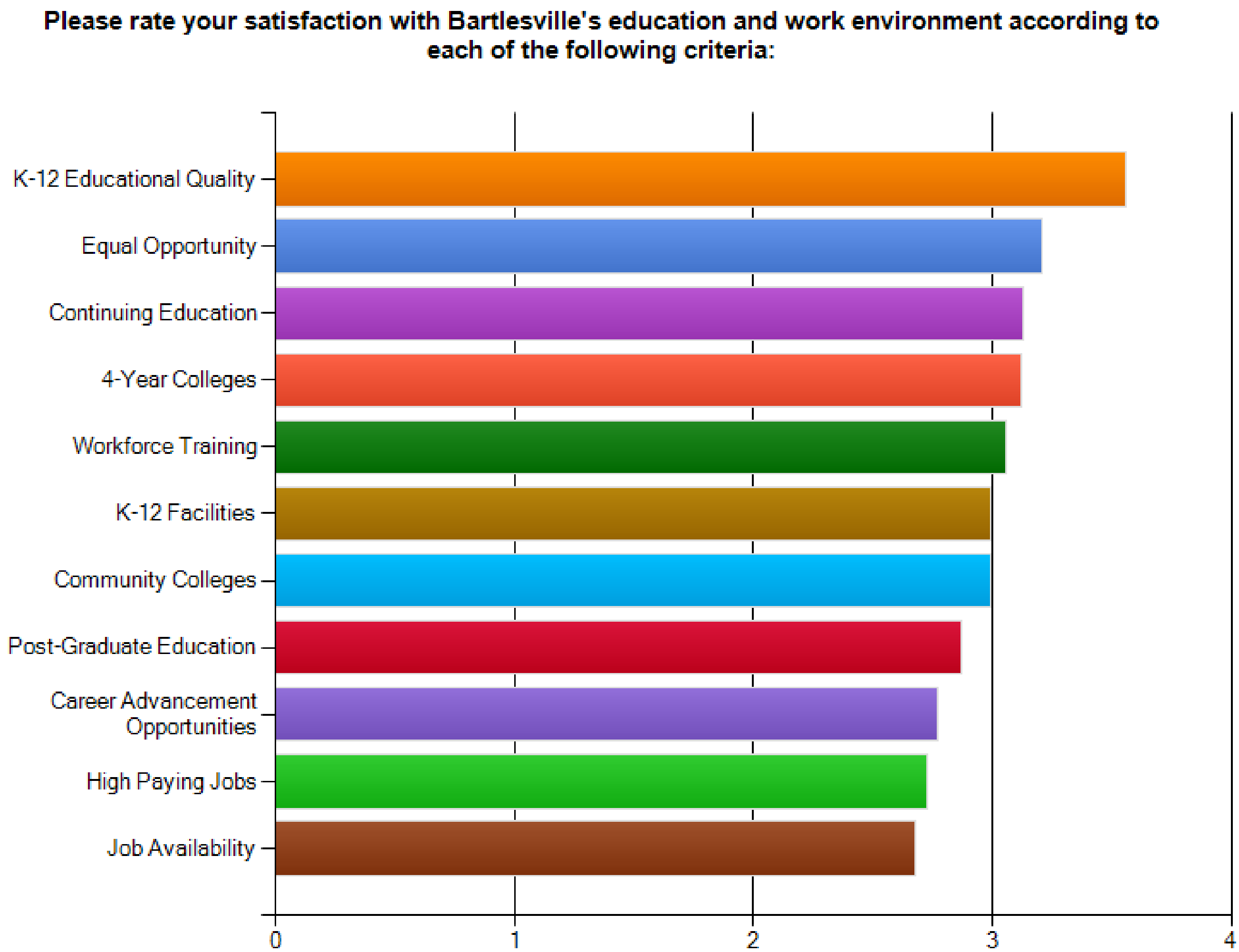
COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



OVER 45

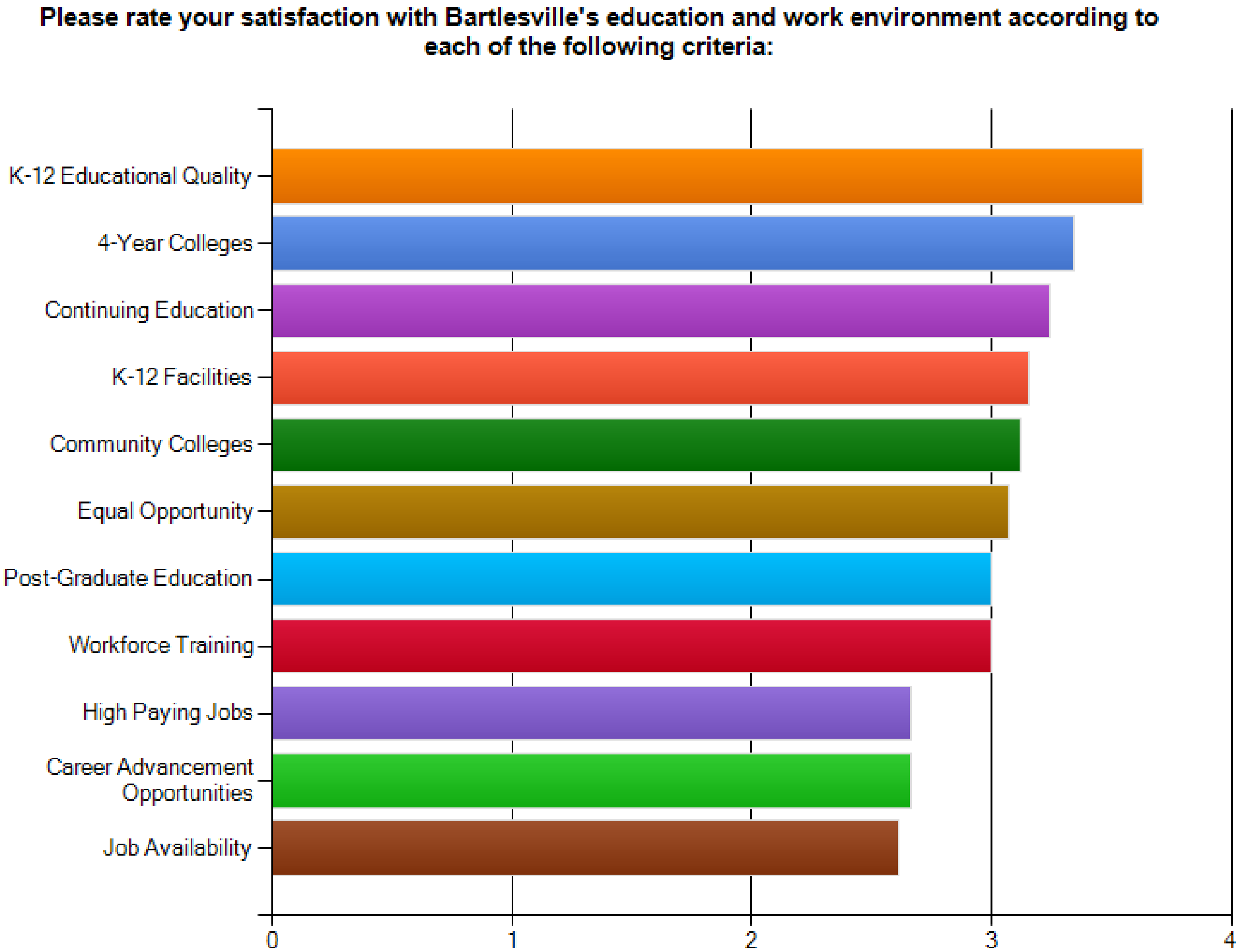
angeloueconomics

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



UNDER 45

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



OVER 45

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)

UNDER 45

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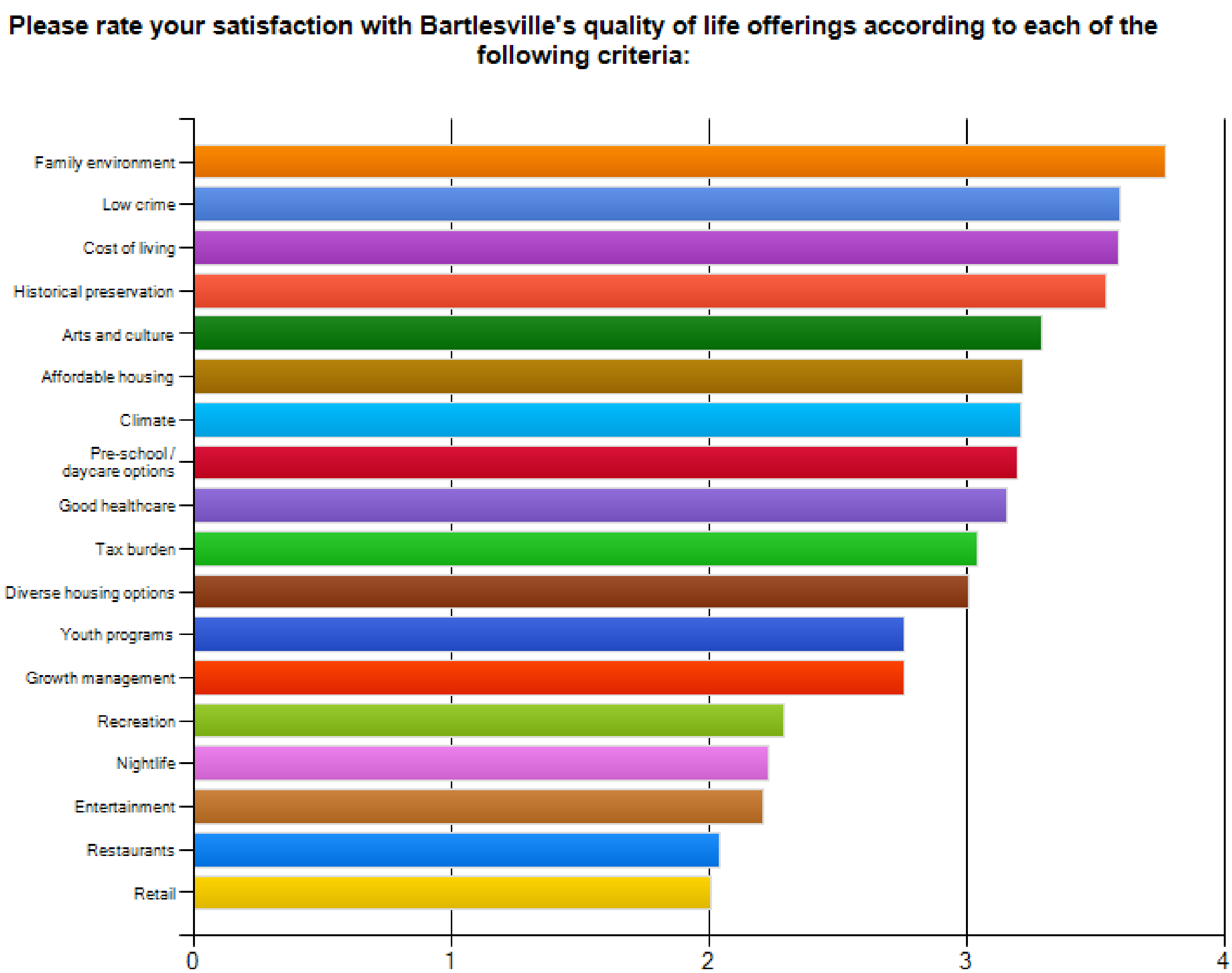
OVER 45

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



UNDER 45

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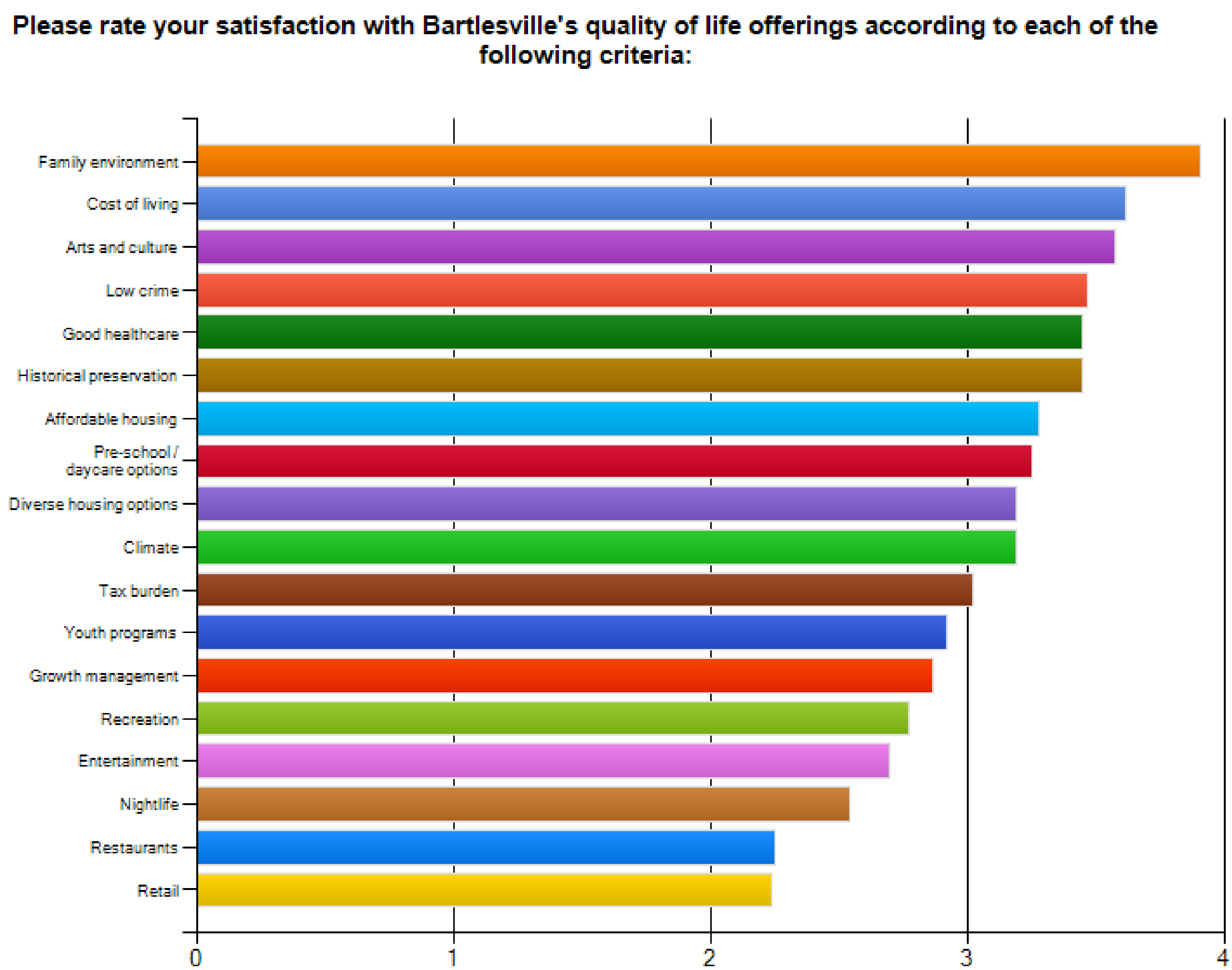
RESPONSES BY AGE (UNDER 45, OVER 45)



OVER 45

angeloueconomics

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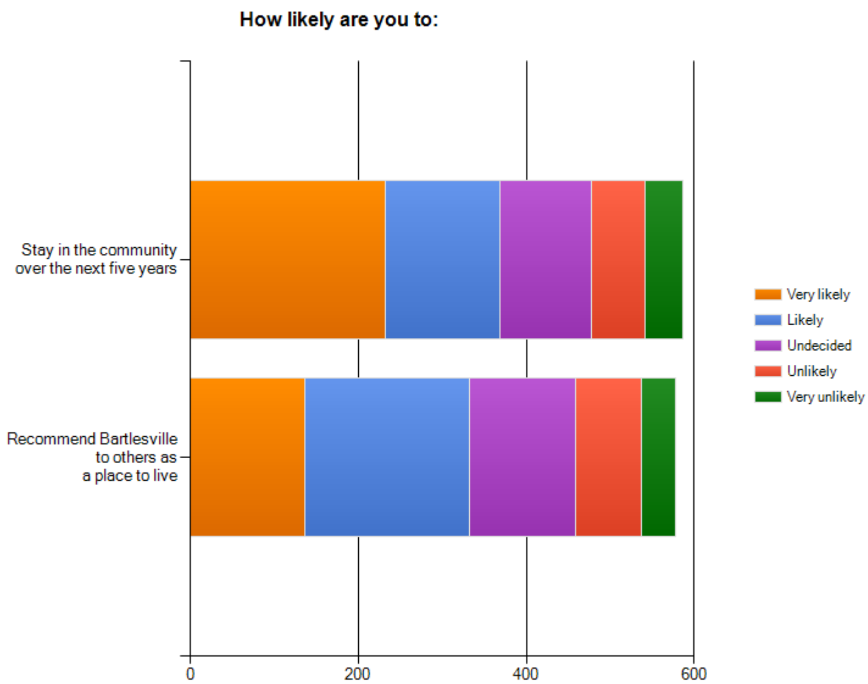
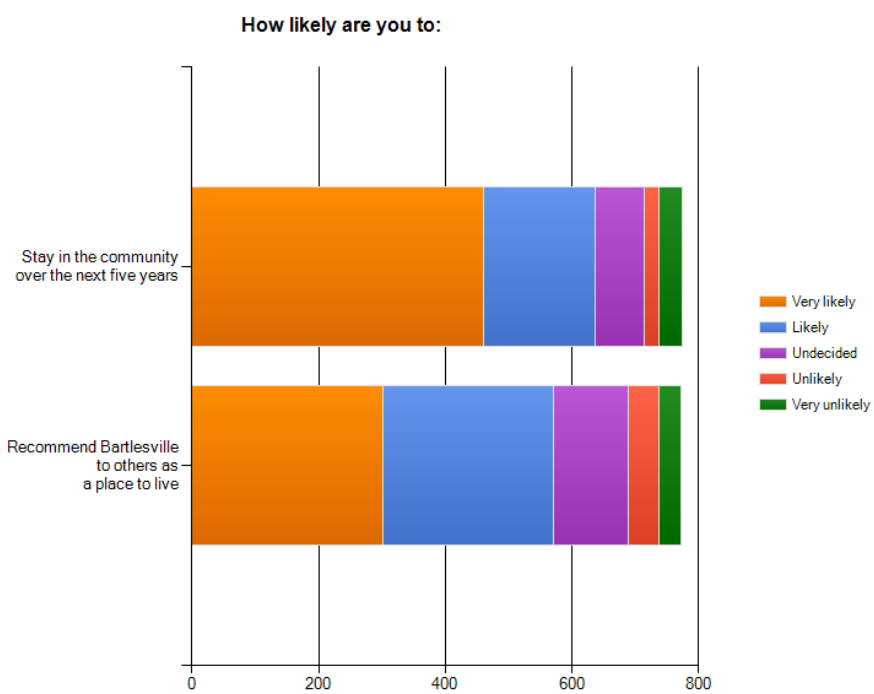
RESPONSES BY AGE (UNDER 45, OVER 45)

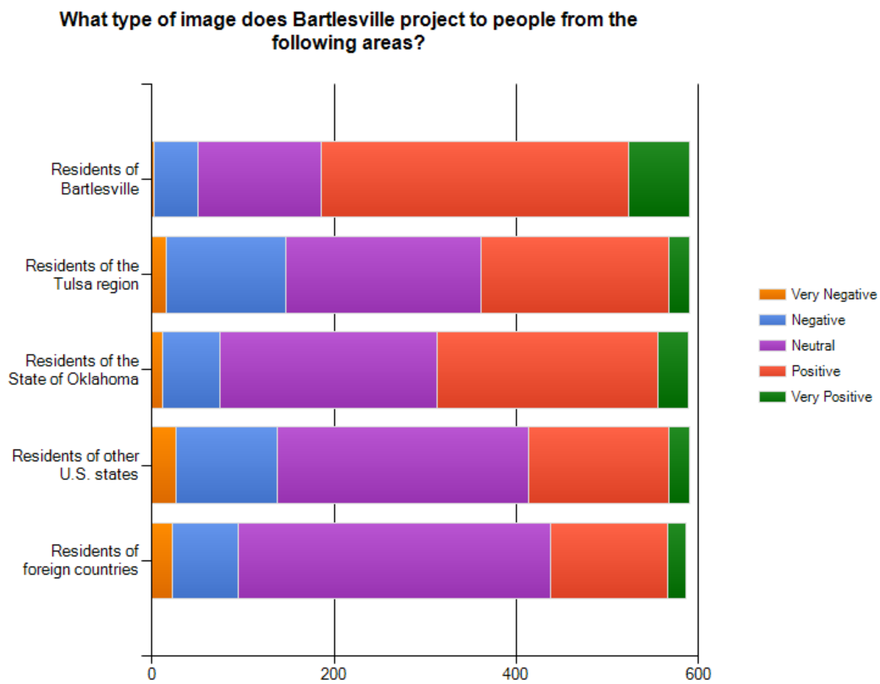


UNDER 45

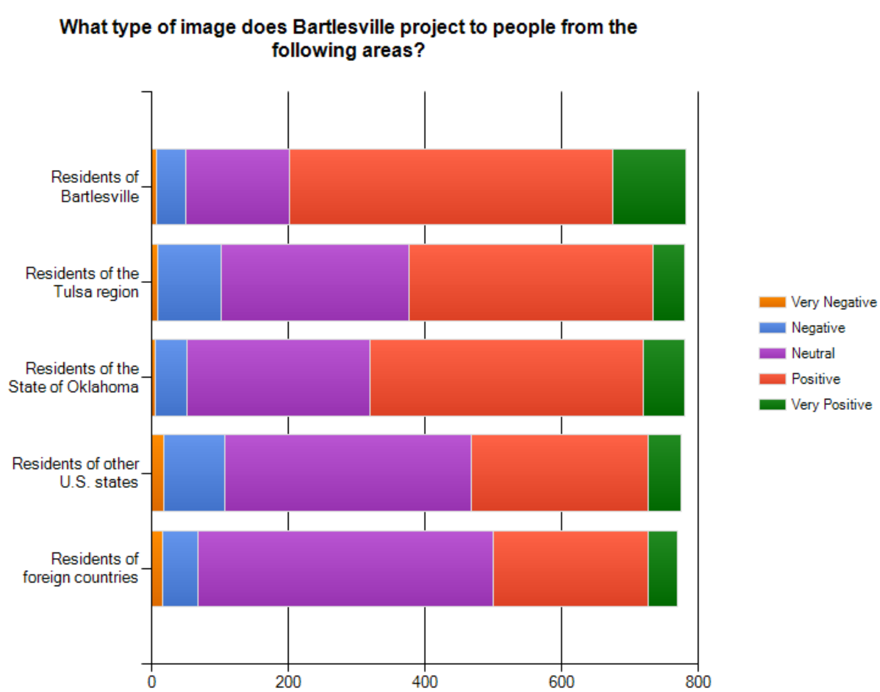


OVER 45

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



UNDER 45



OVER 45

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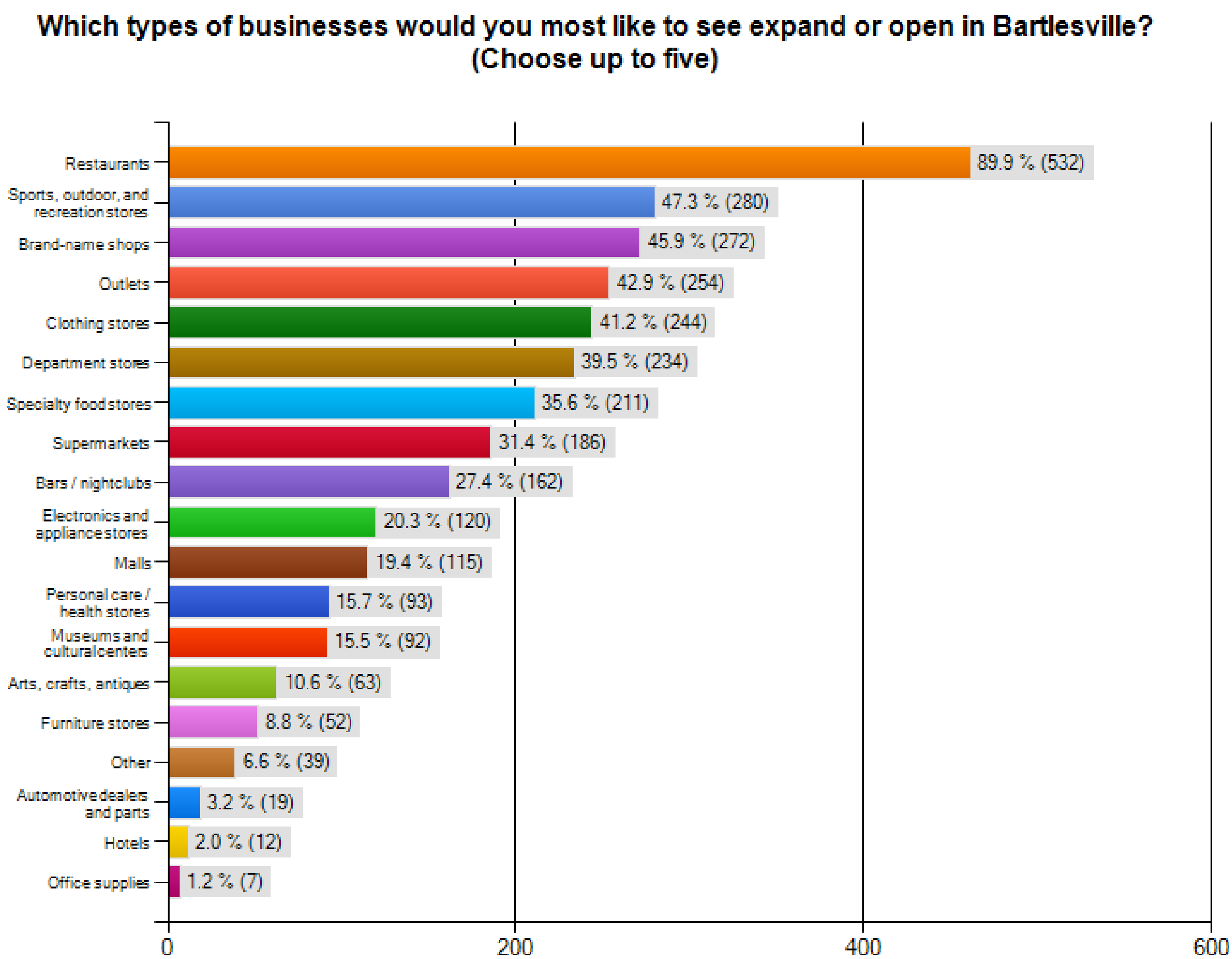
RESPONSES BY AGE (UNDER 45, OVER 45)



UNDER 45

angeloueconomics

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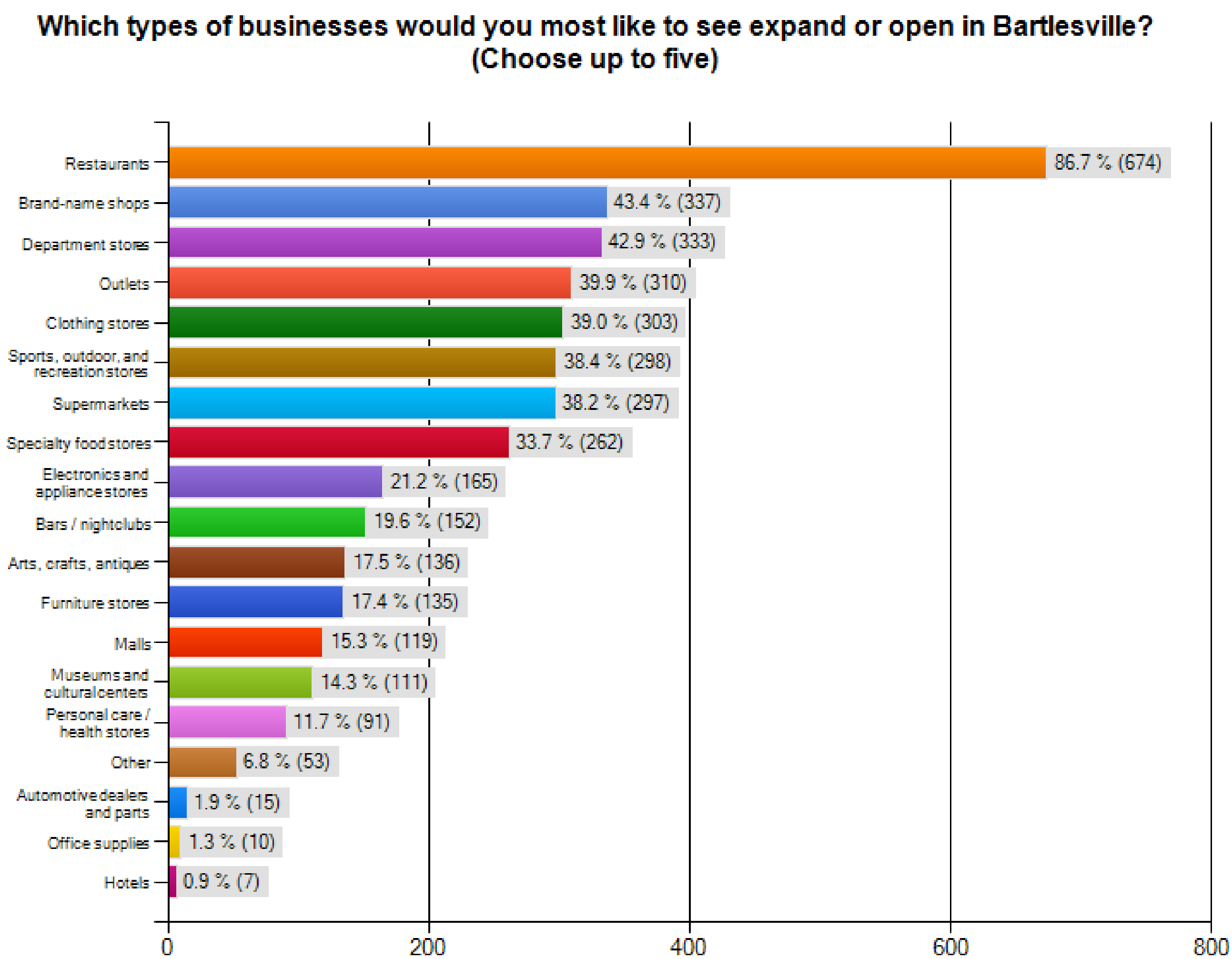
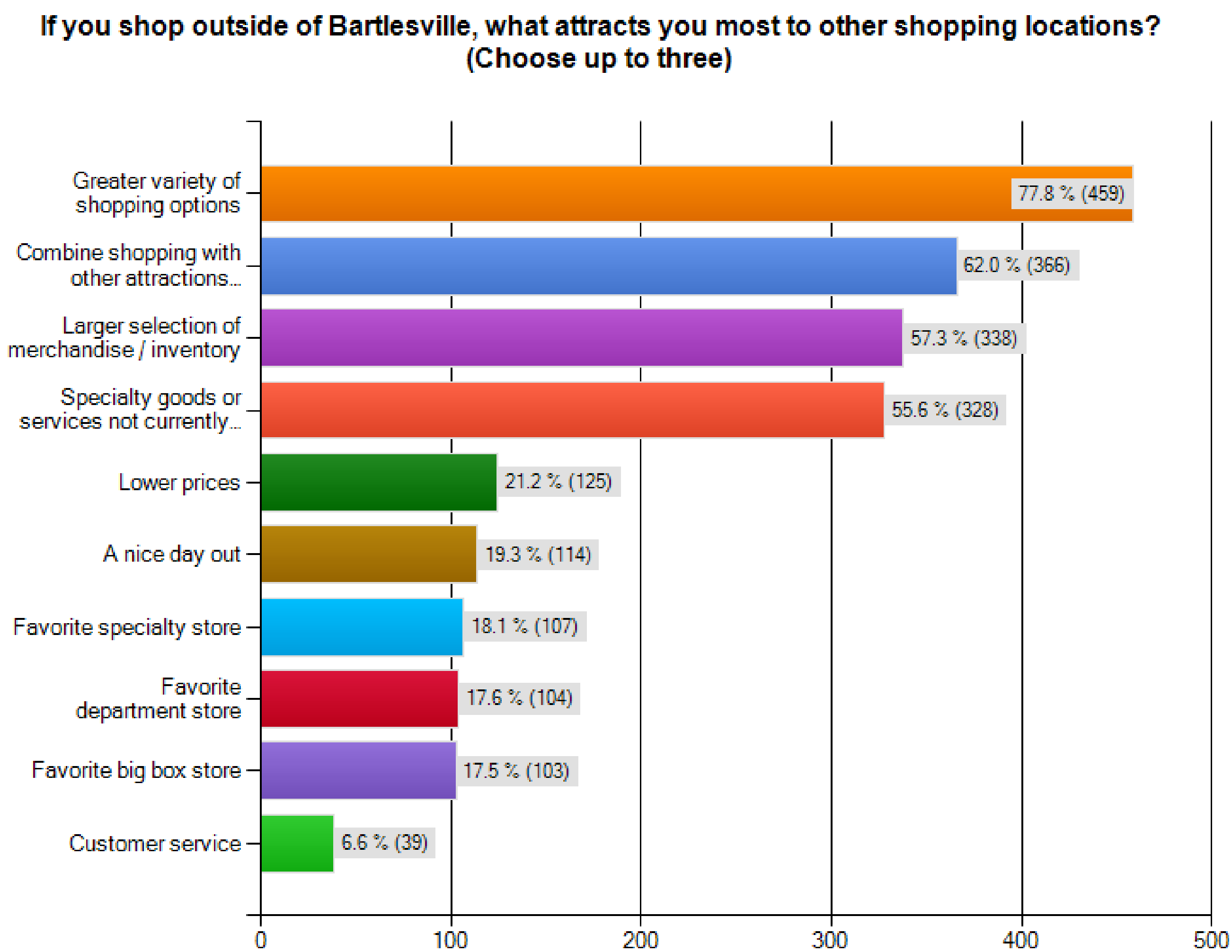
RESPONSES BY AGE (UNDER 45, OVER 45)



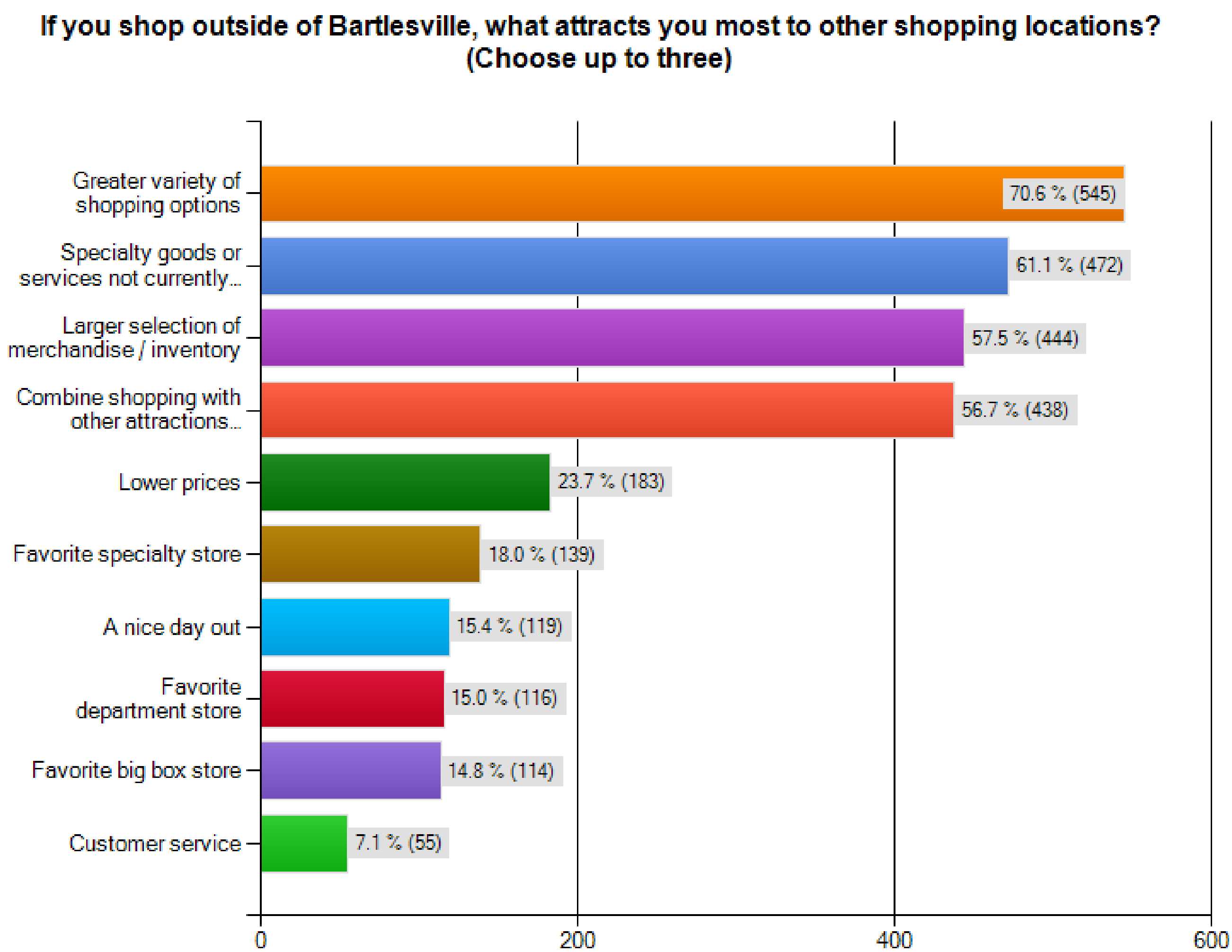
OVER 45

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



UNDER 45

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)

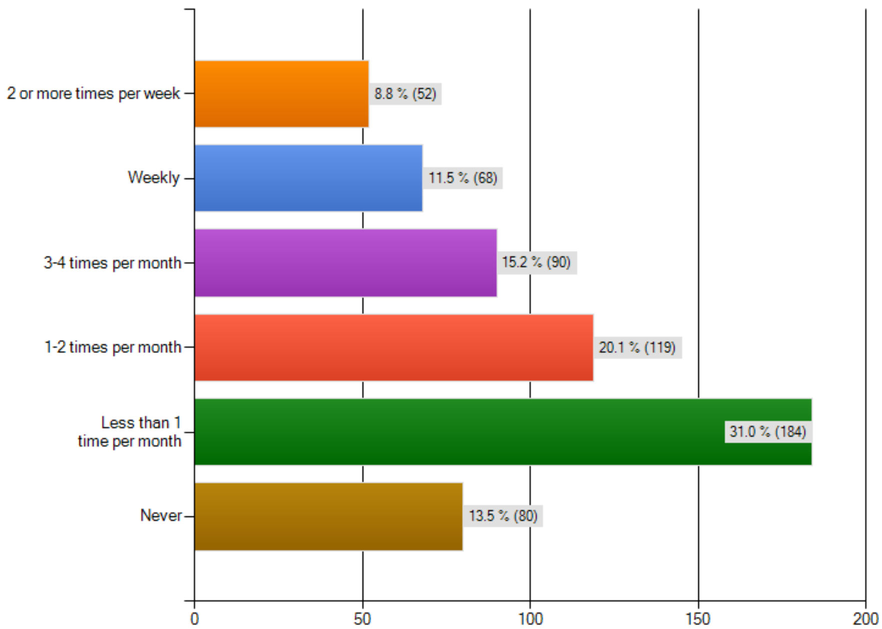


OVER 45

angeloueconomics

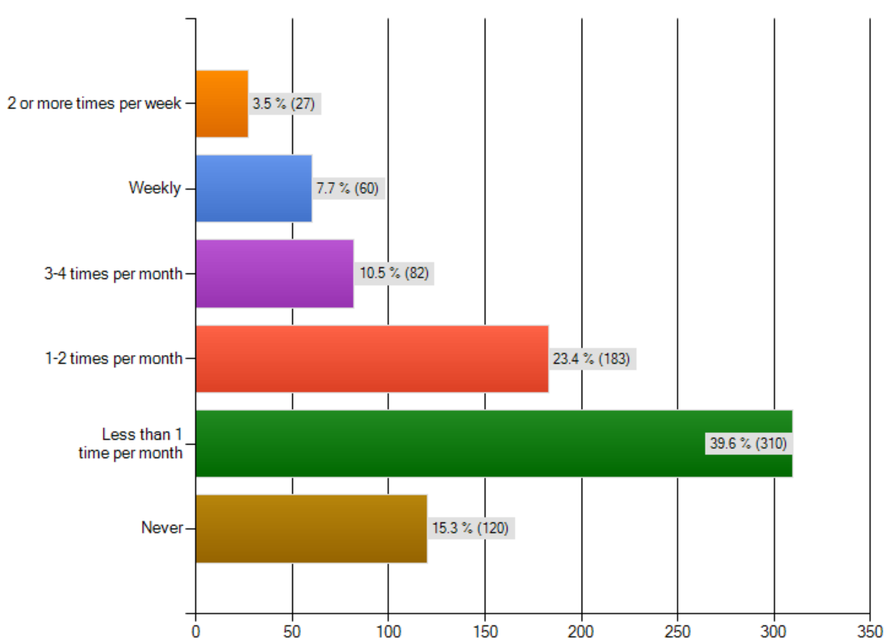
COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)

How often do you shop online for retail items that can be purchased locally?



UNDER 45

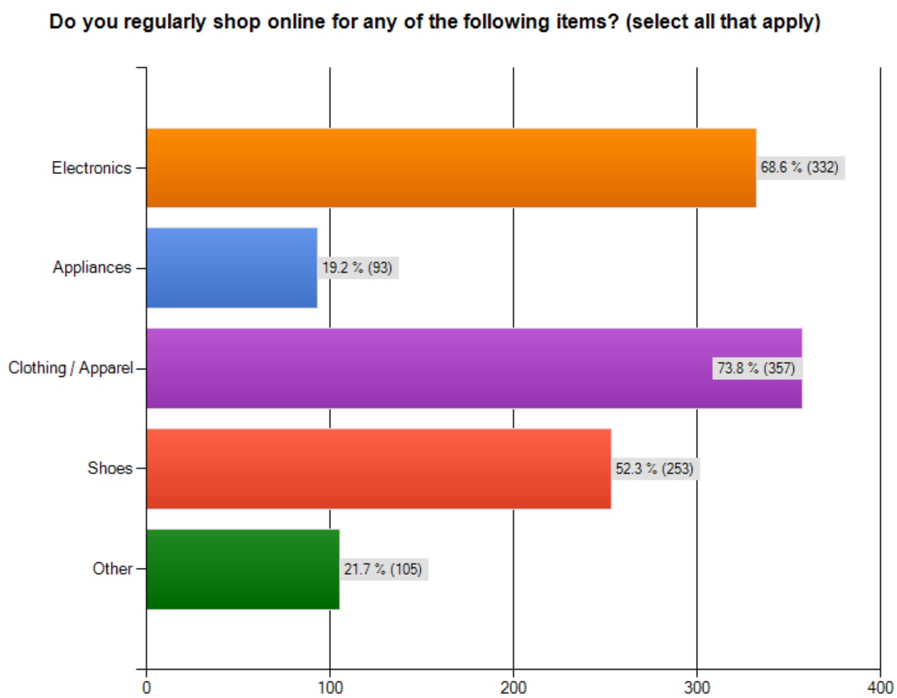
How often do you shop online for retail items that can be purchased locally?



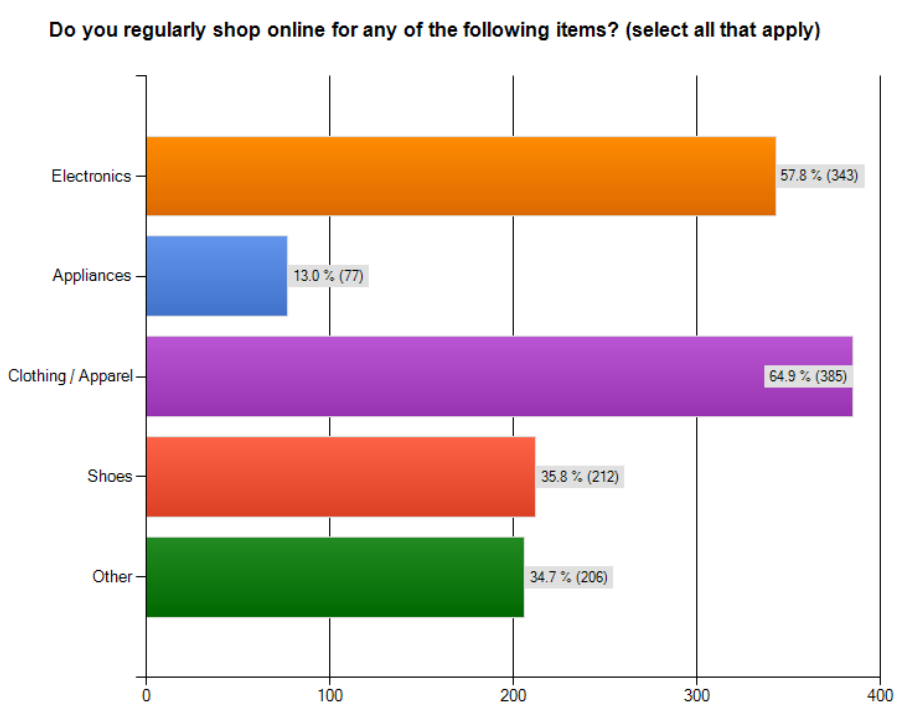
OVER 45

angeloueconomics

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



UNDER 45



OVER 45

angeloueconomics

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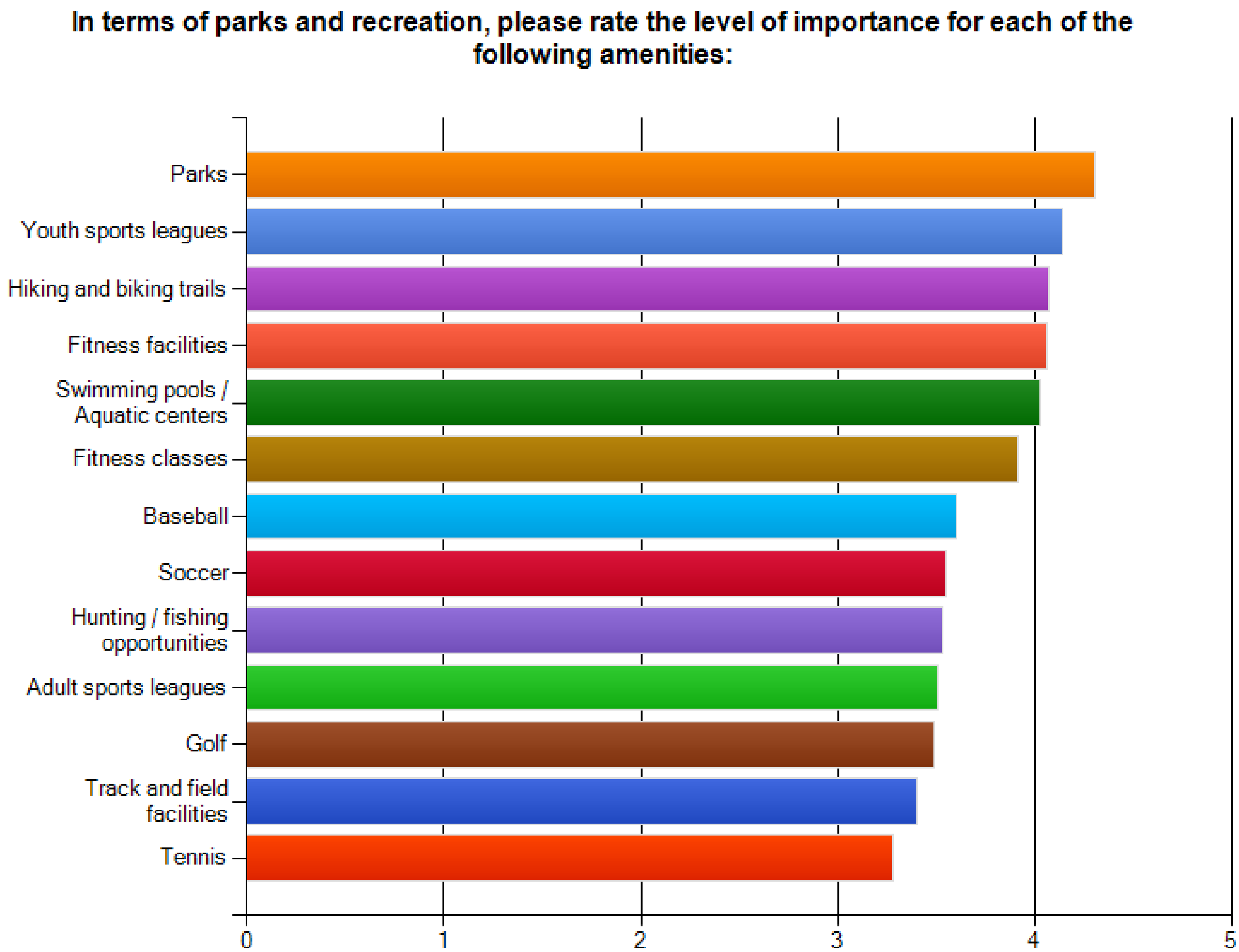
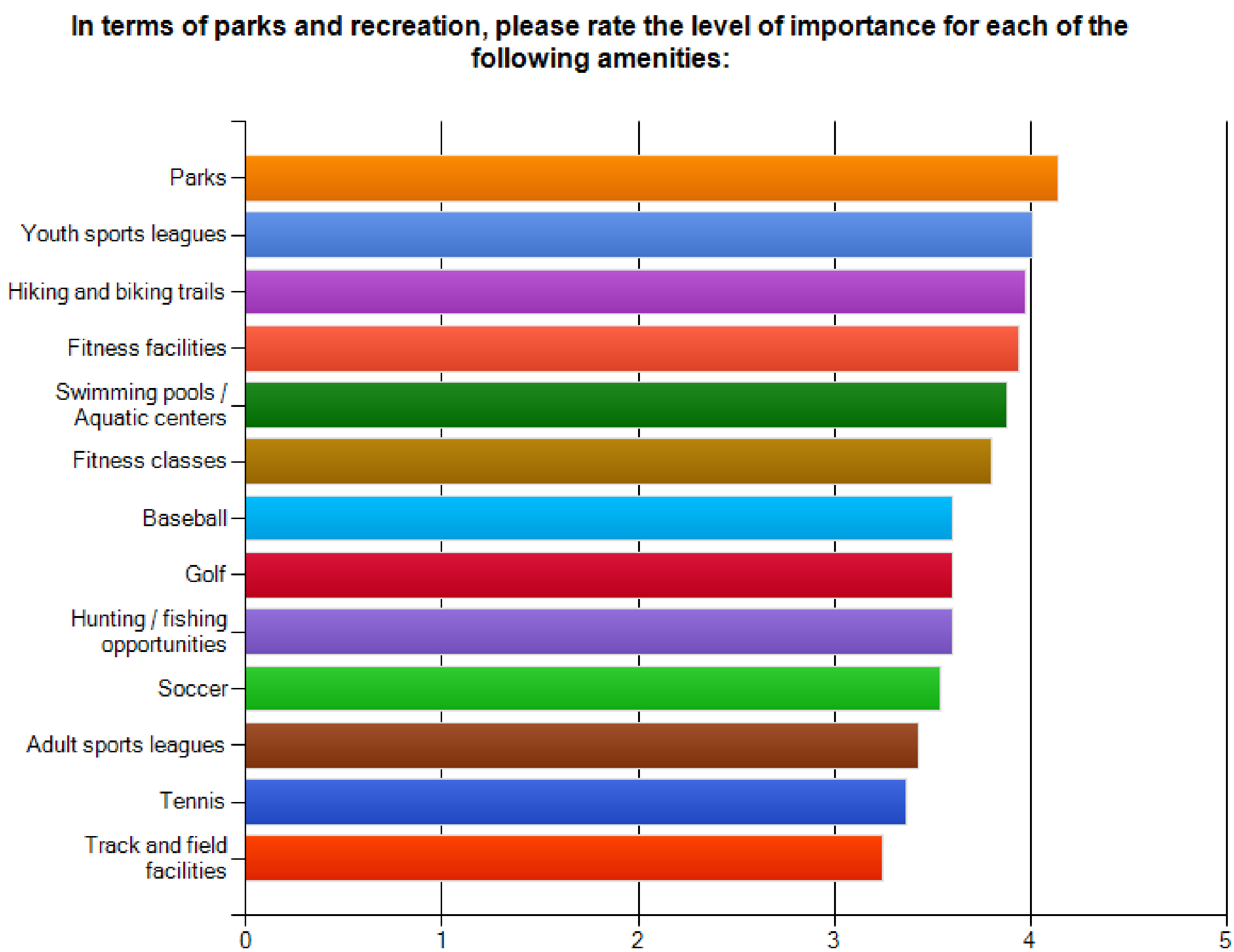
RESPONSES BY AGE (UNDER 45, OVER 45)



UNDER 45

COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)



OVER 45

angeloueconomics

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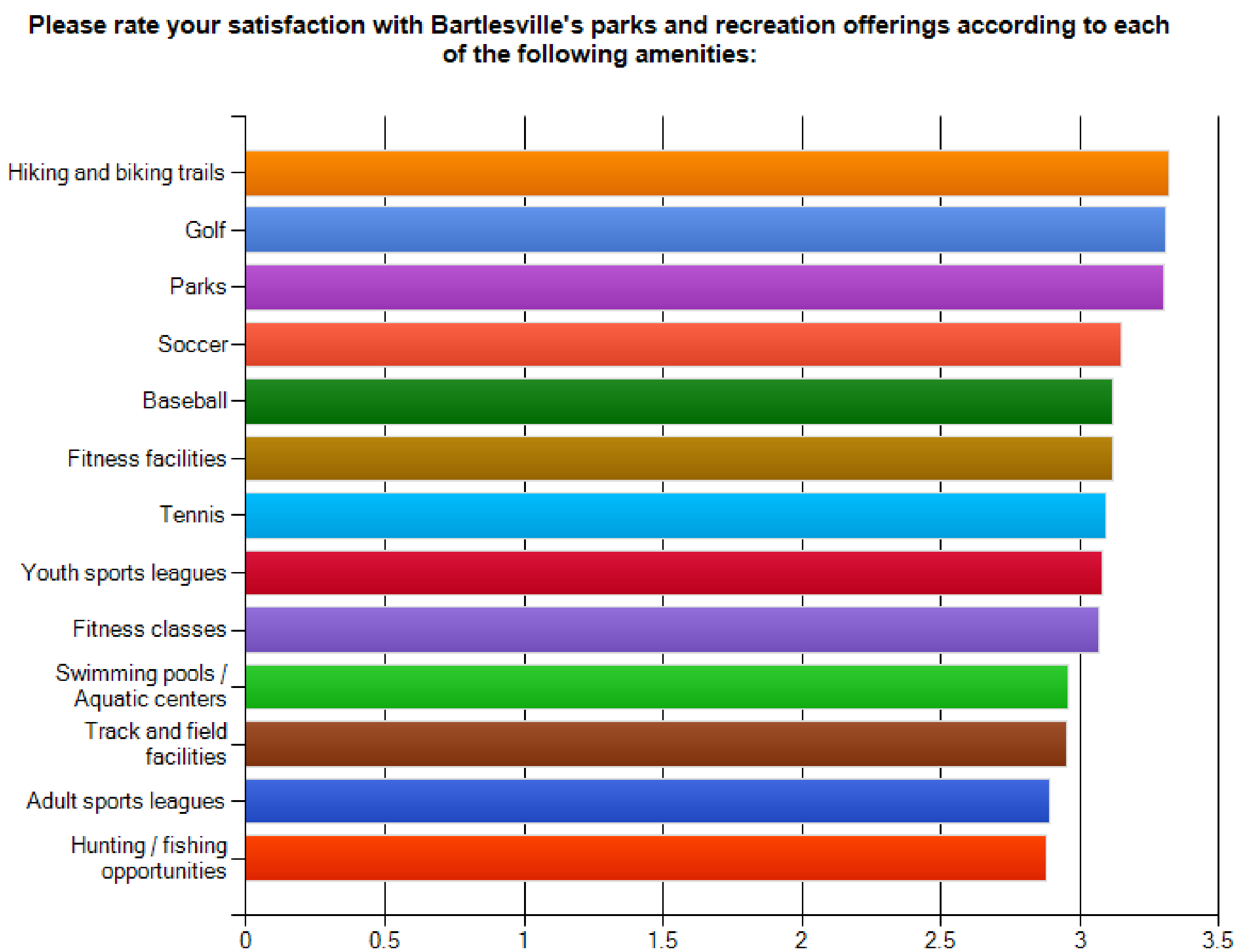

UNDER 45

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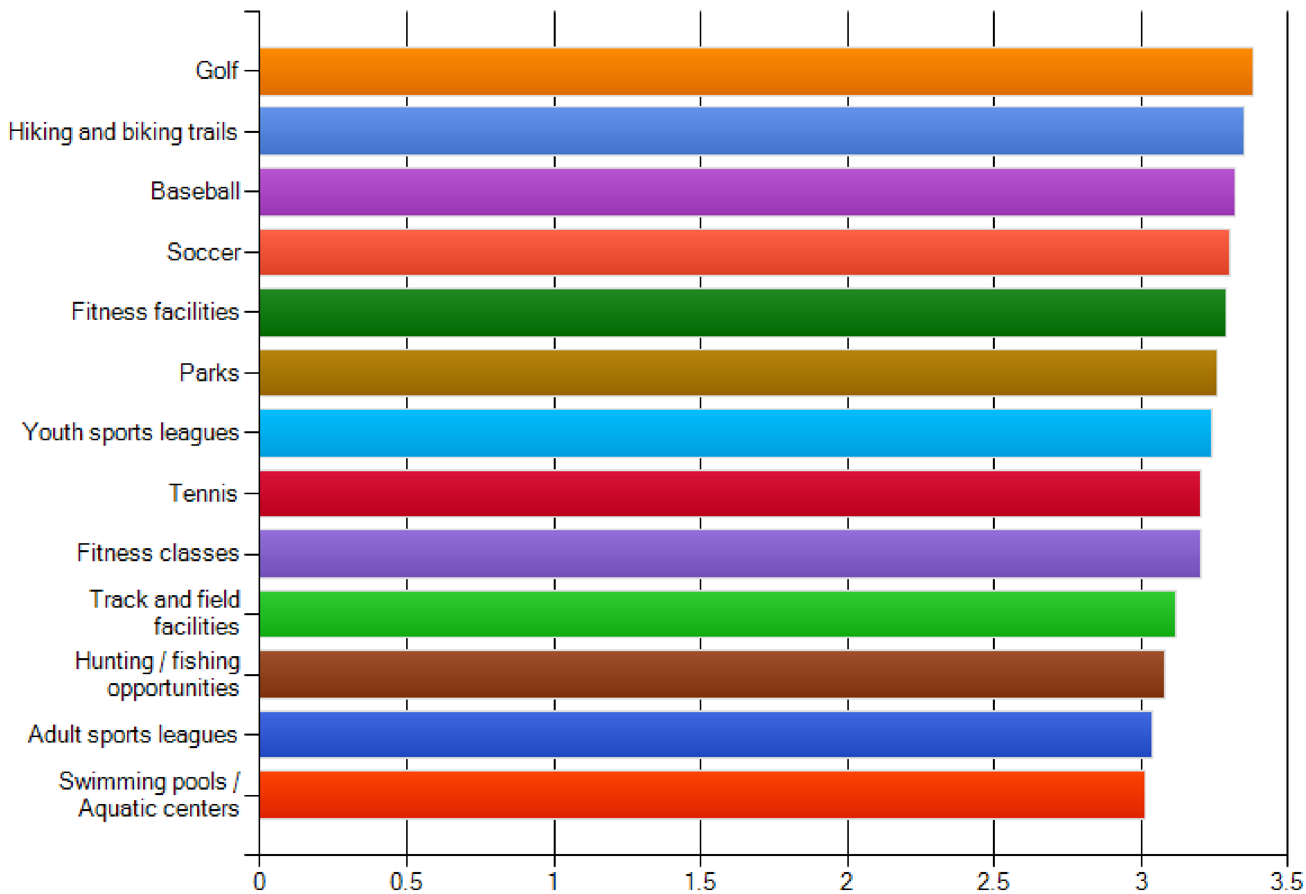
COMMUNITY SURVEY:
RESPONSES BY AGE (UNDER 45, OVER 45)

Please rate your satisfaction with Bartlesville's parks and recreation offerings according to each of the following amenities:



OVER 45

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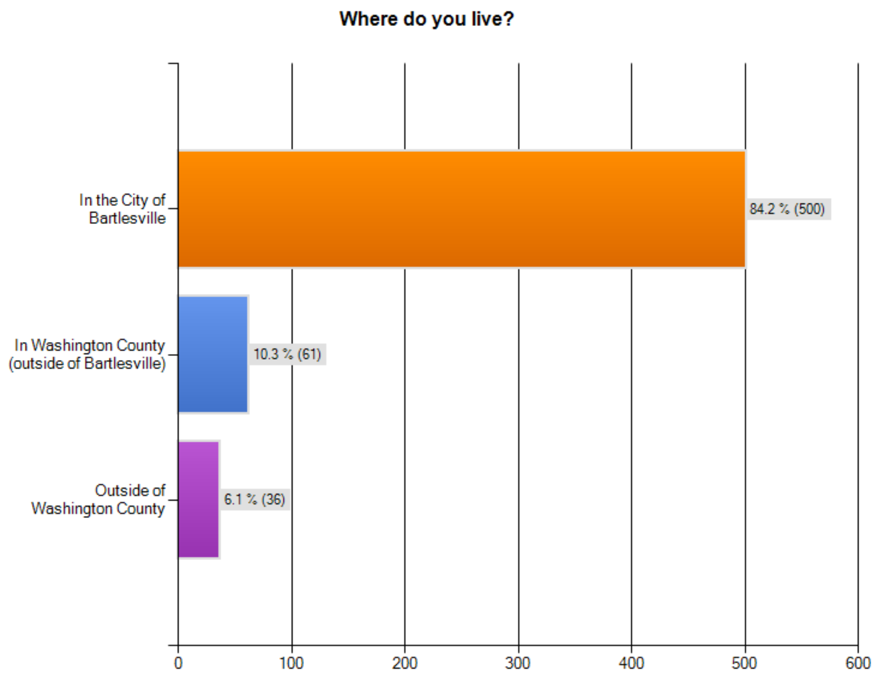
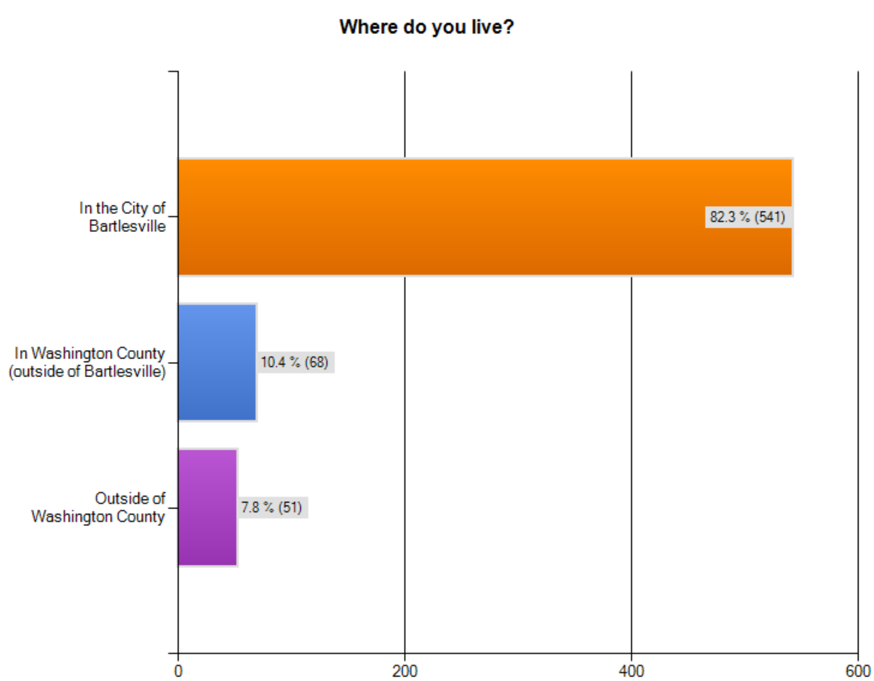
COMMUNITY SURVEY:

RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



WORK IN DOWNTOWN



WORK OUTSIDE OF DOWNTOWN

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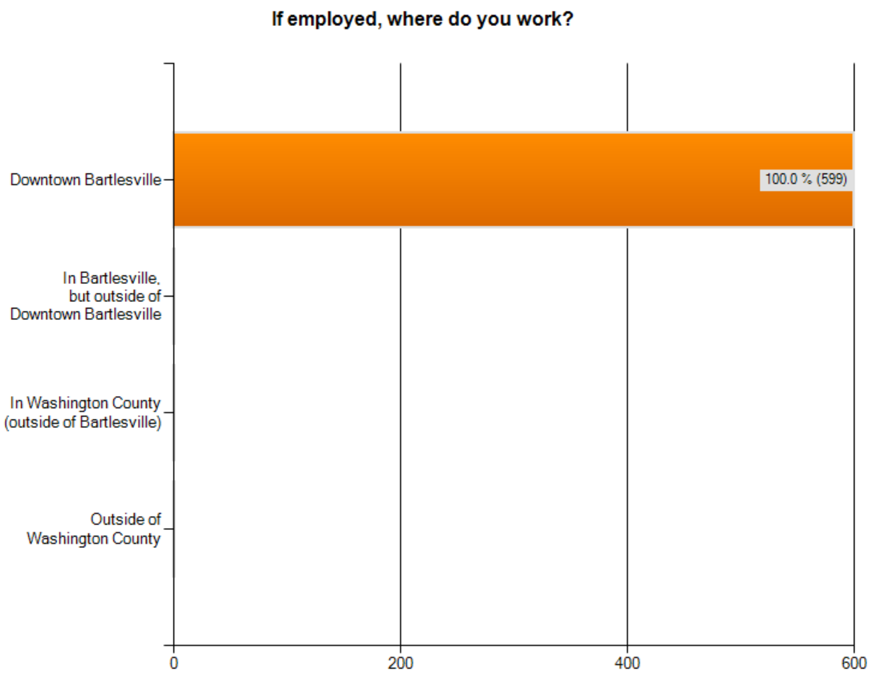
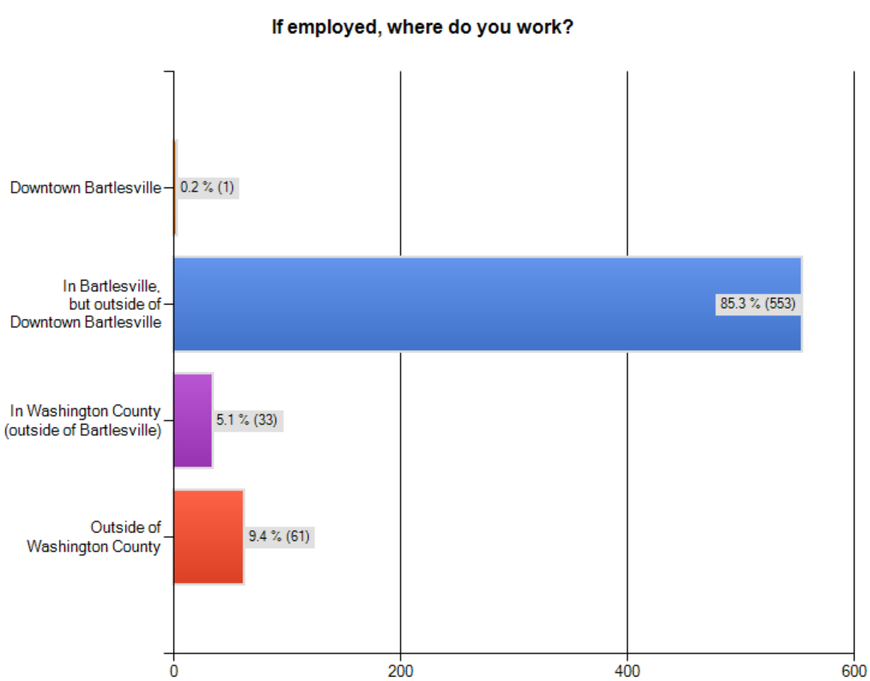
COMMUNITY SURVEY:
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



WORK IN DOWNTOWN



WORK OUTSIDE OF DOWNTOWN

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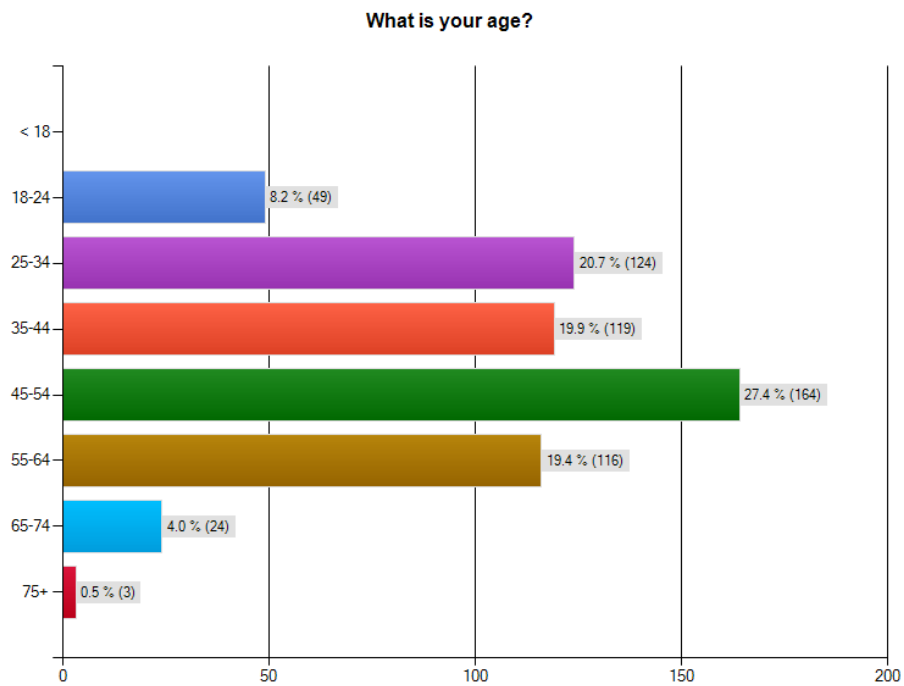
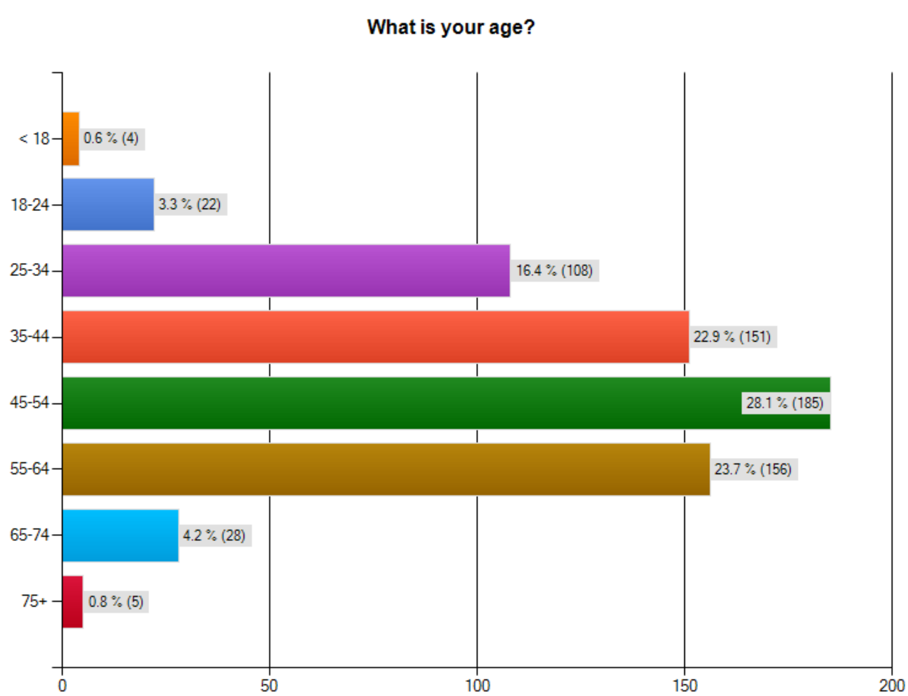
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



WORK IN DOWNTOWN



WORK OUTSIDE OF DOWNTOWN

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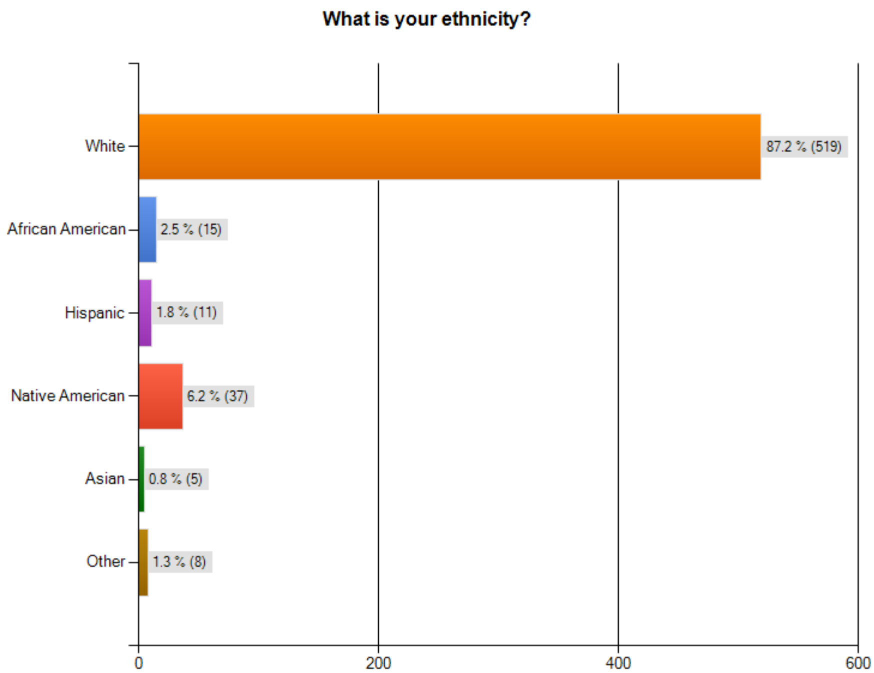
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



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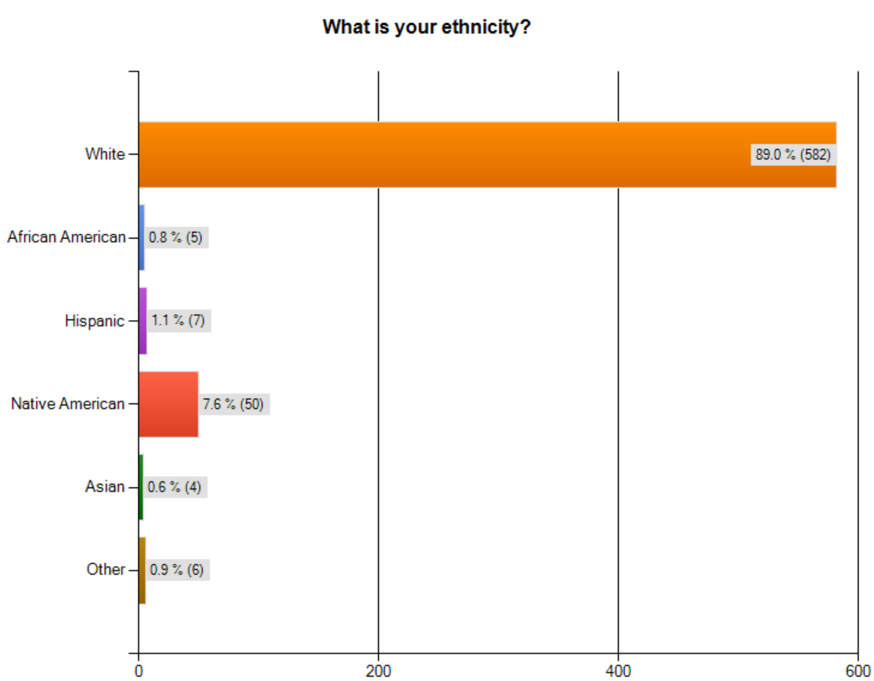

WORK OUTSIDE OF DOWNTOWN

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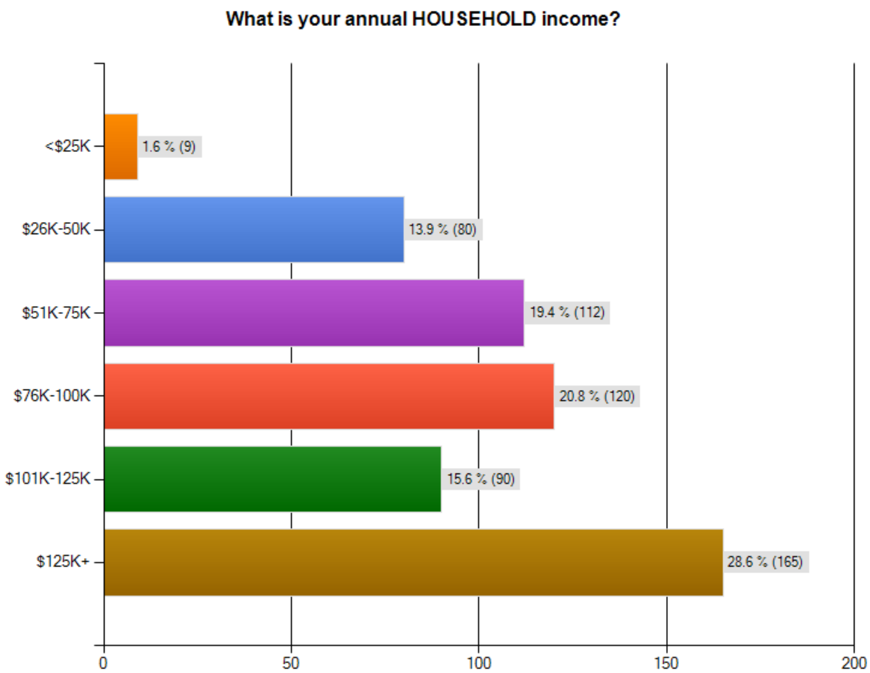
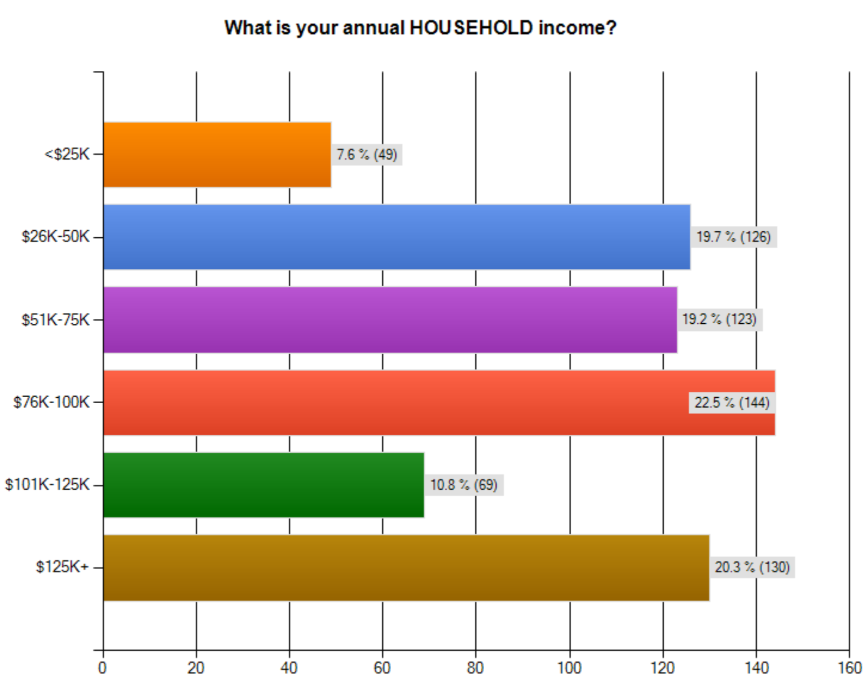


WORK IN DOWNTOWN



WORK OUTSIDE OF DOWNTOWN

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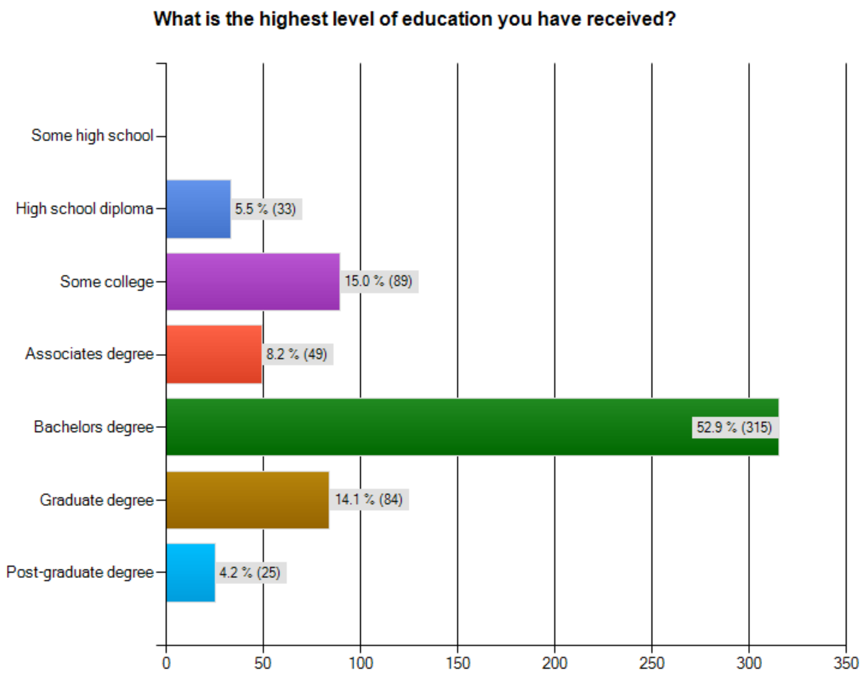
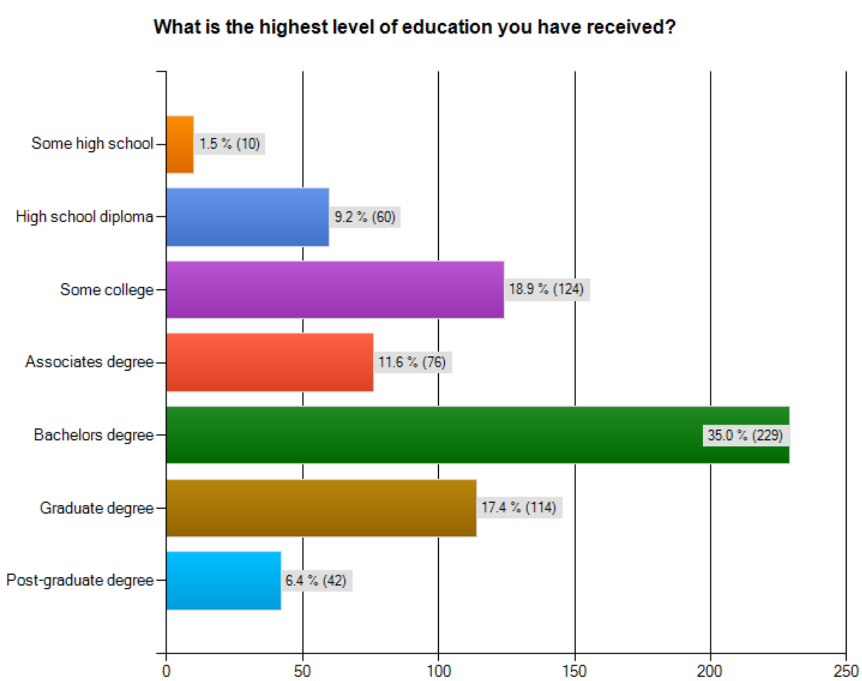
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



WORK IN DOWNTOWN



WORK OUTSIDE OF DOWNTOWN

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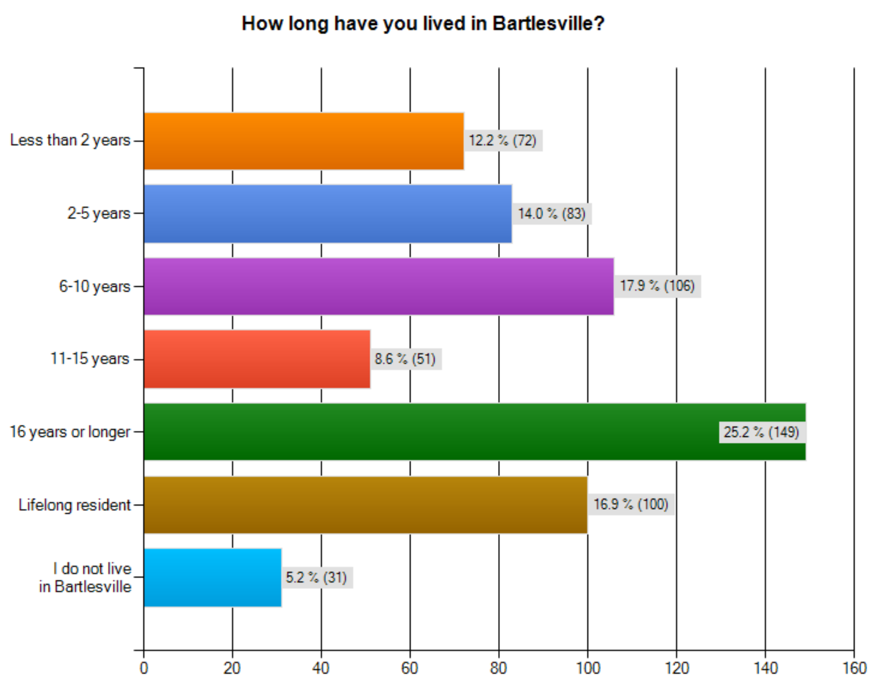
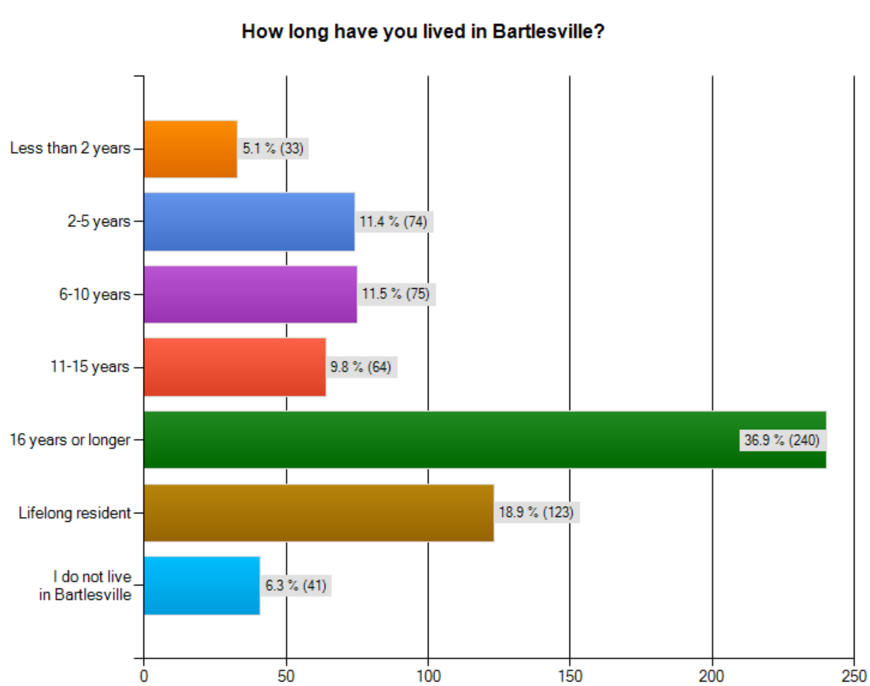


WORK IN DOWNTOWN



WORK OUTSIDE OF DOWNTOWN

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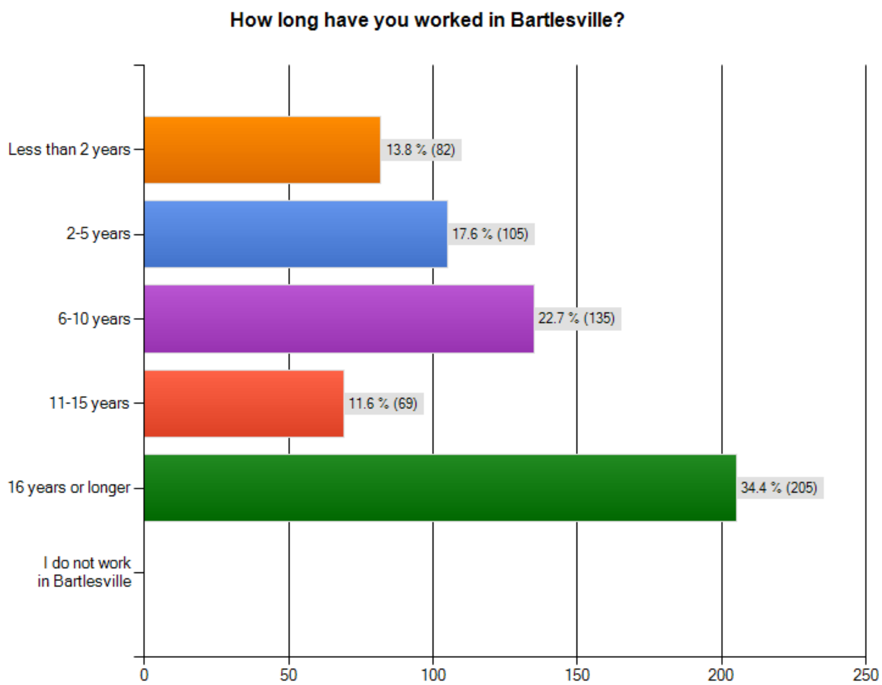
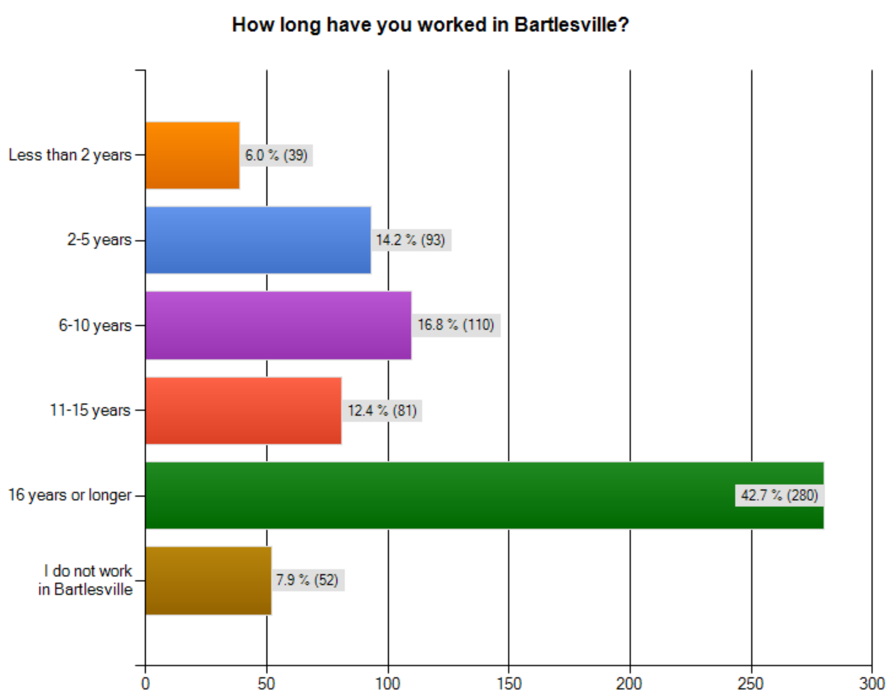


WORK IN DOWNTOWN



WORK OUTSIDE OF DOWNTOWN

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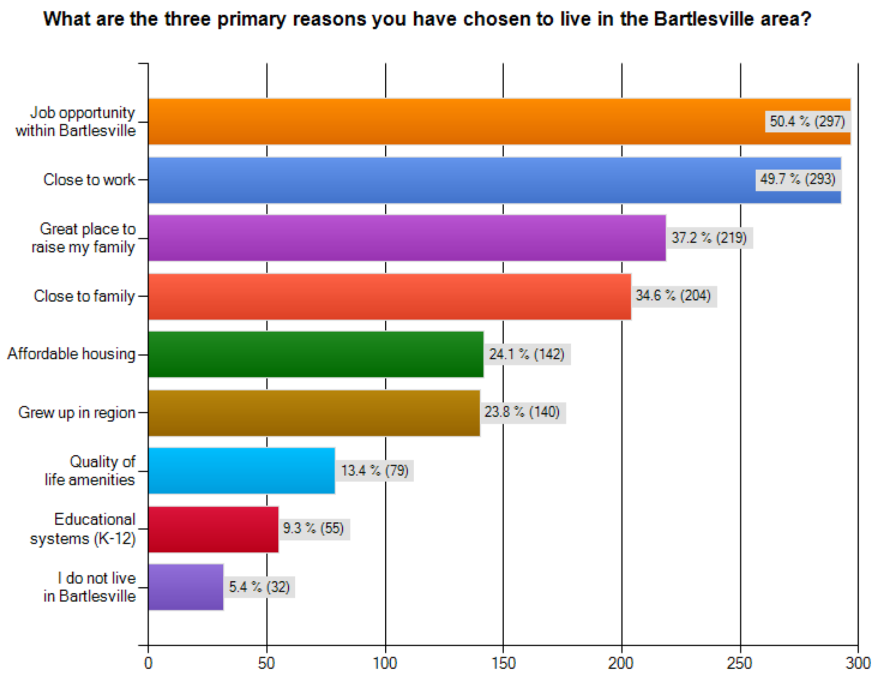
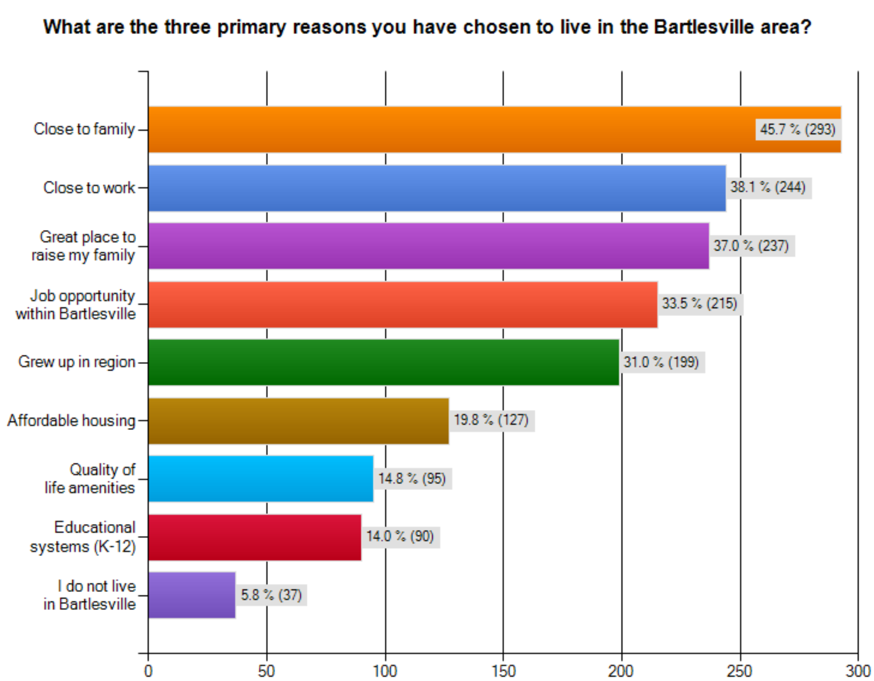
COMMUNITY SURVEY:
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)

WORK IN DOWNTOWN



WORK OUTSIDE OF DOWNTOWN



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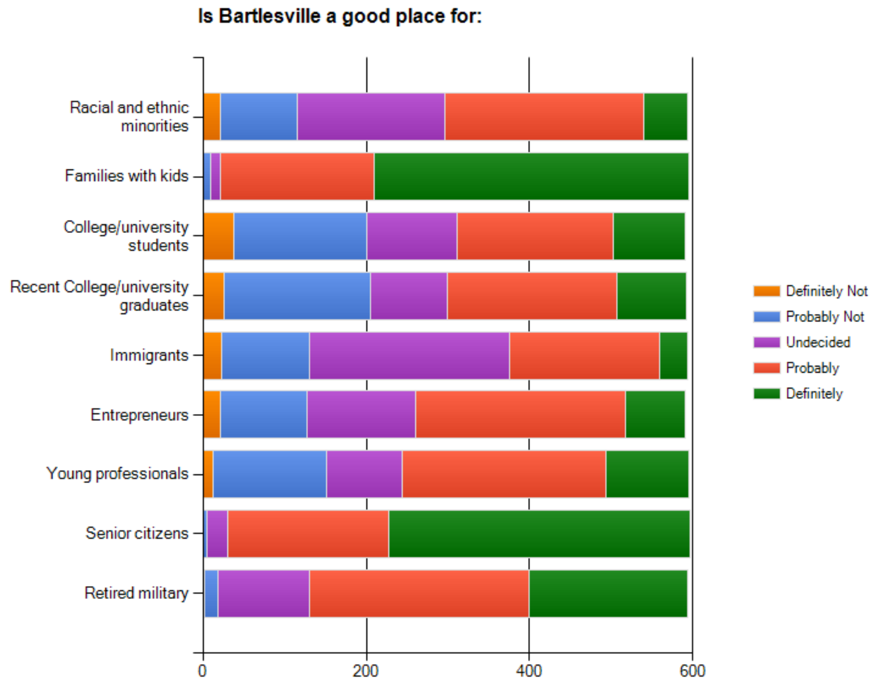

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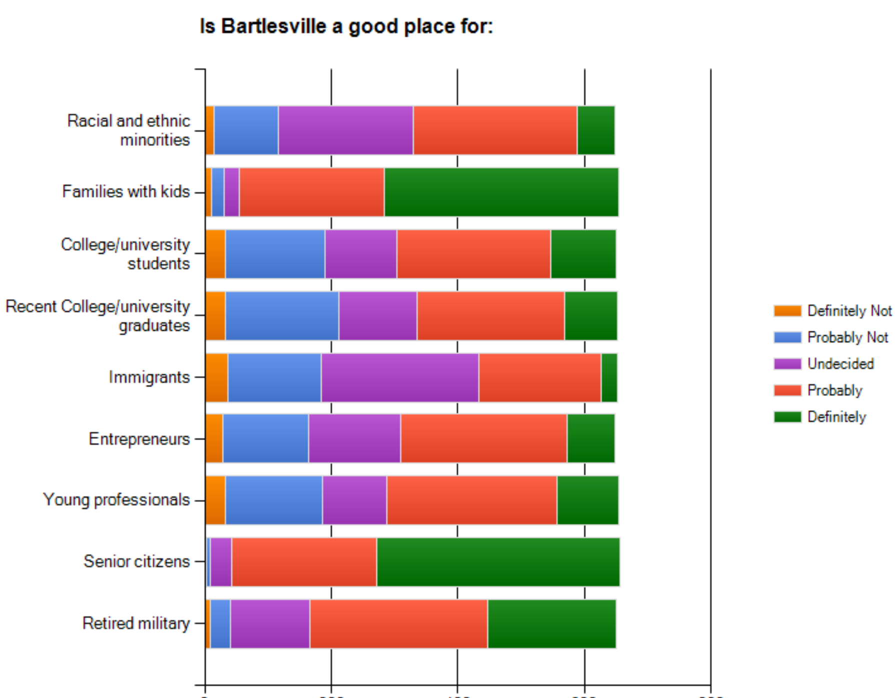

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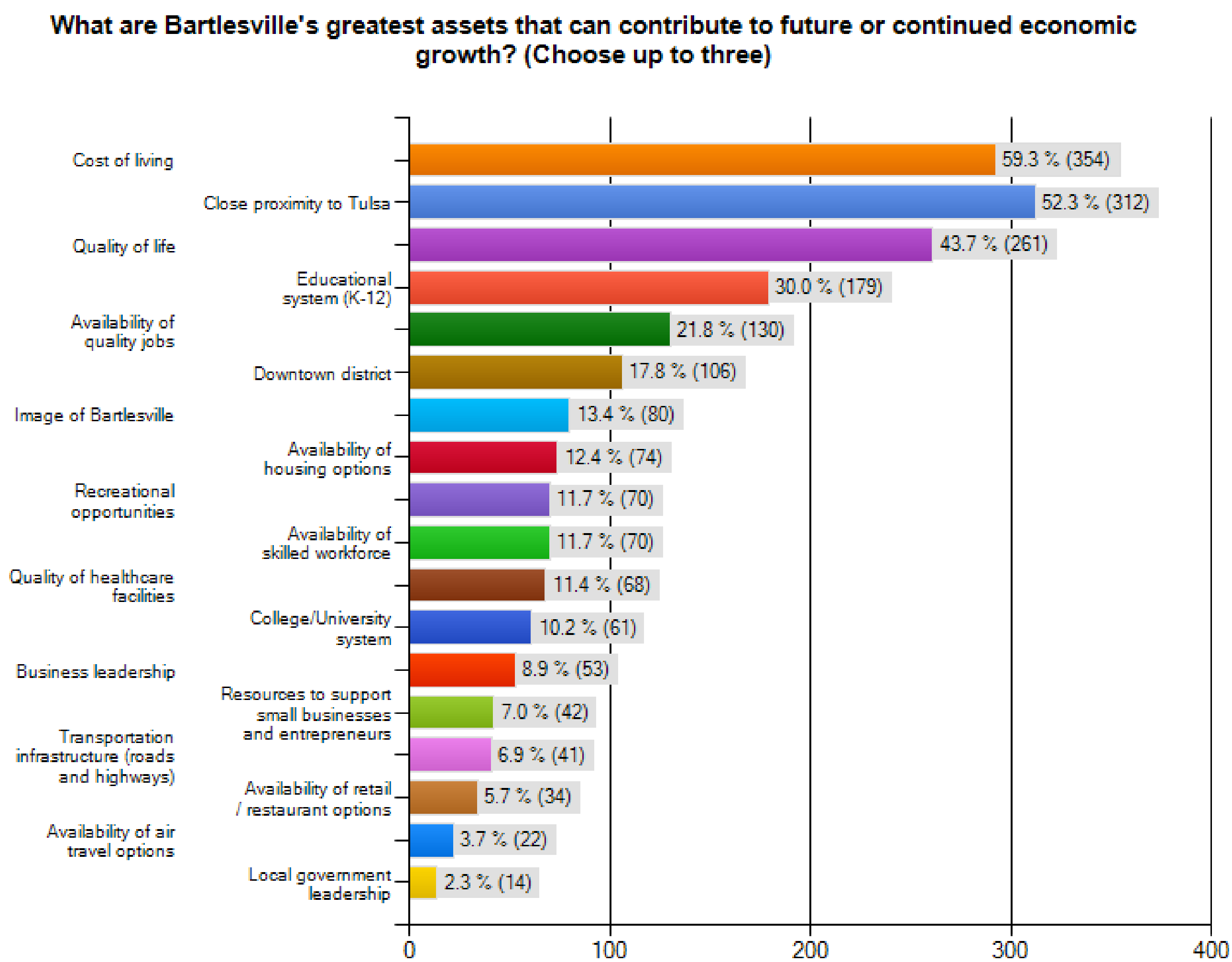

WORK IN DOWNTOWN

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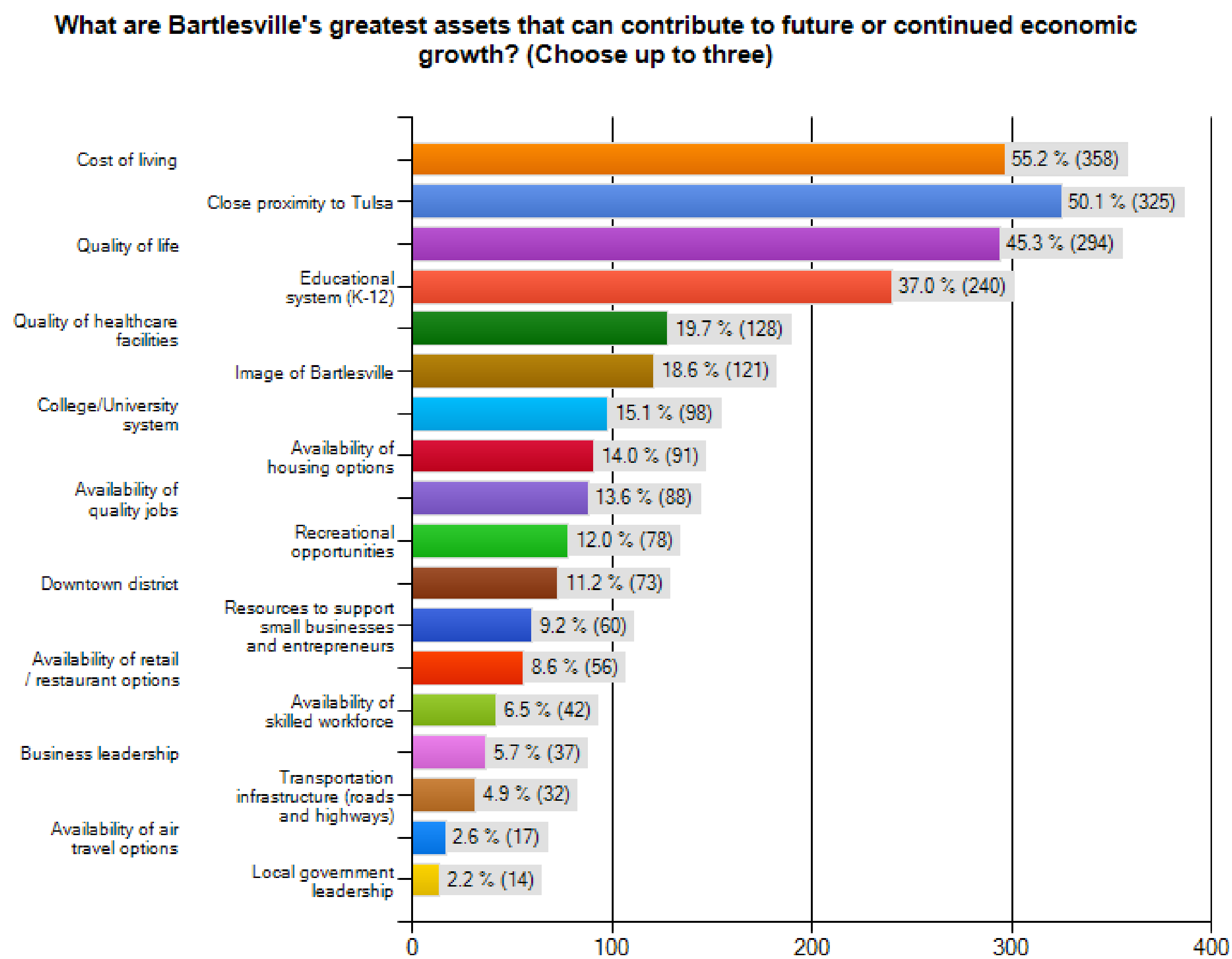
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



WORK OUTSIDE OF DOWNTOWN

angeloueconomics

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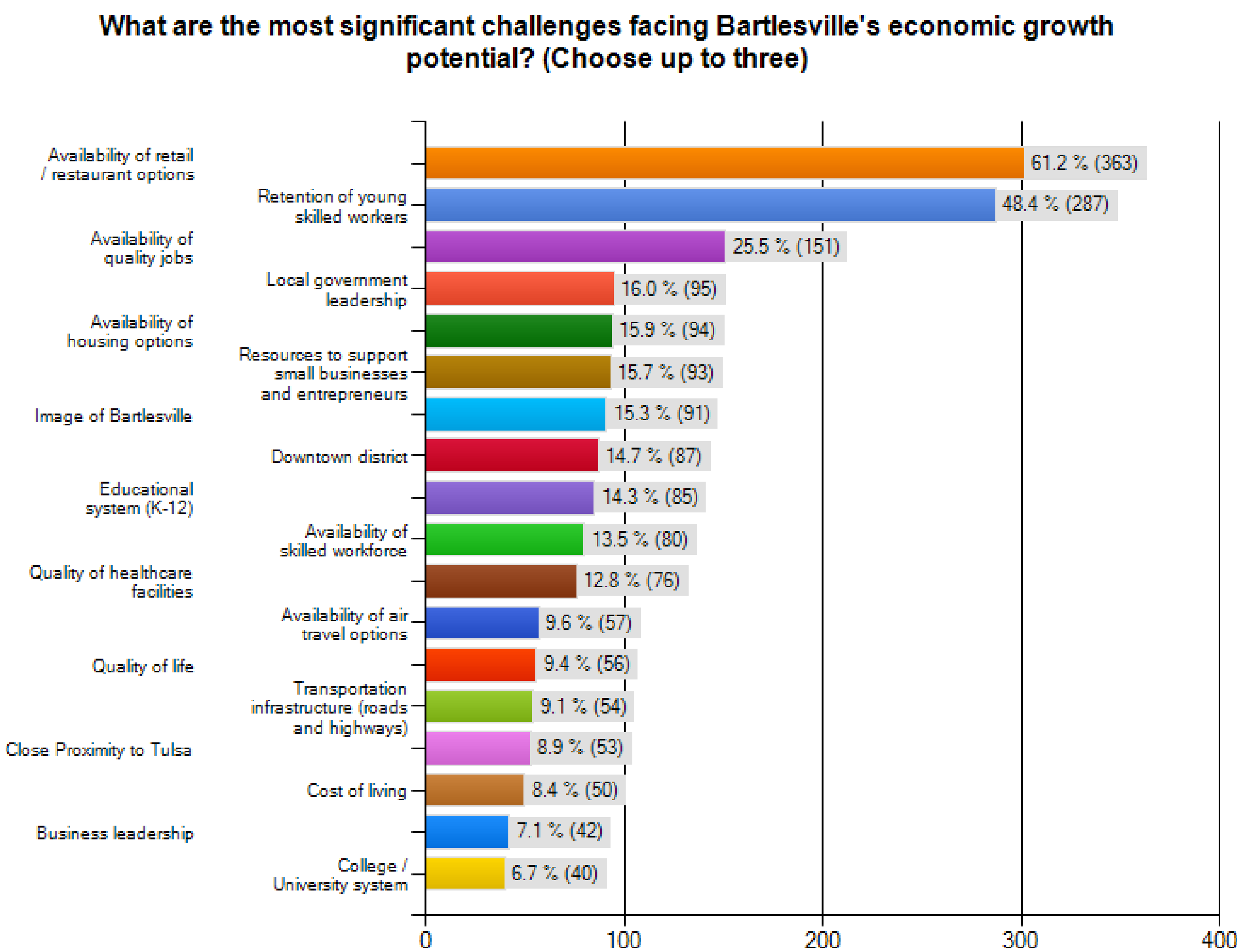

WORK IN DOWNTOWN

angeloueconomics

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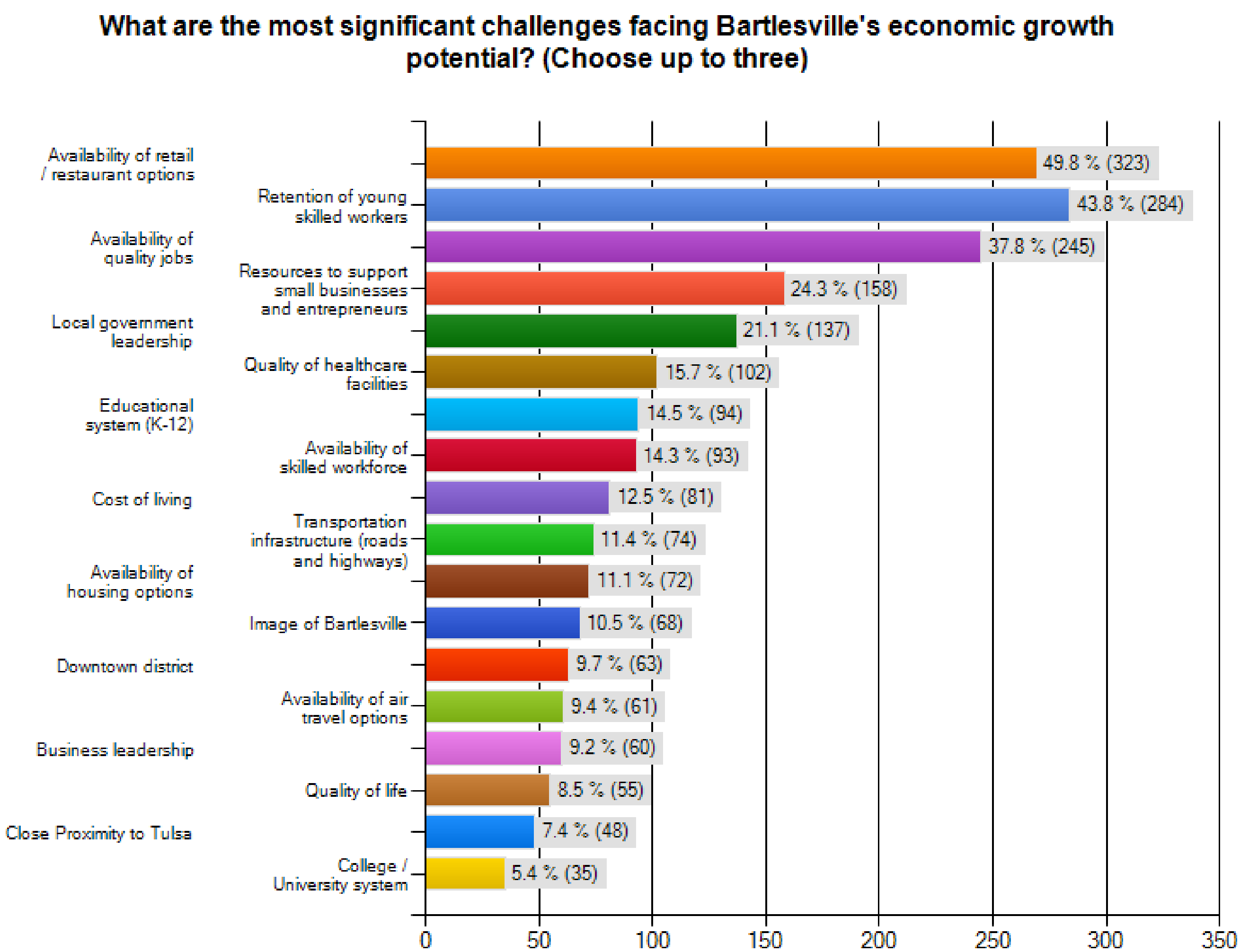

WORK OUTSIDE OF DOWNTOWN

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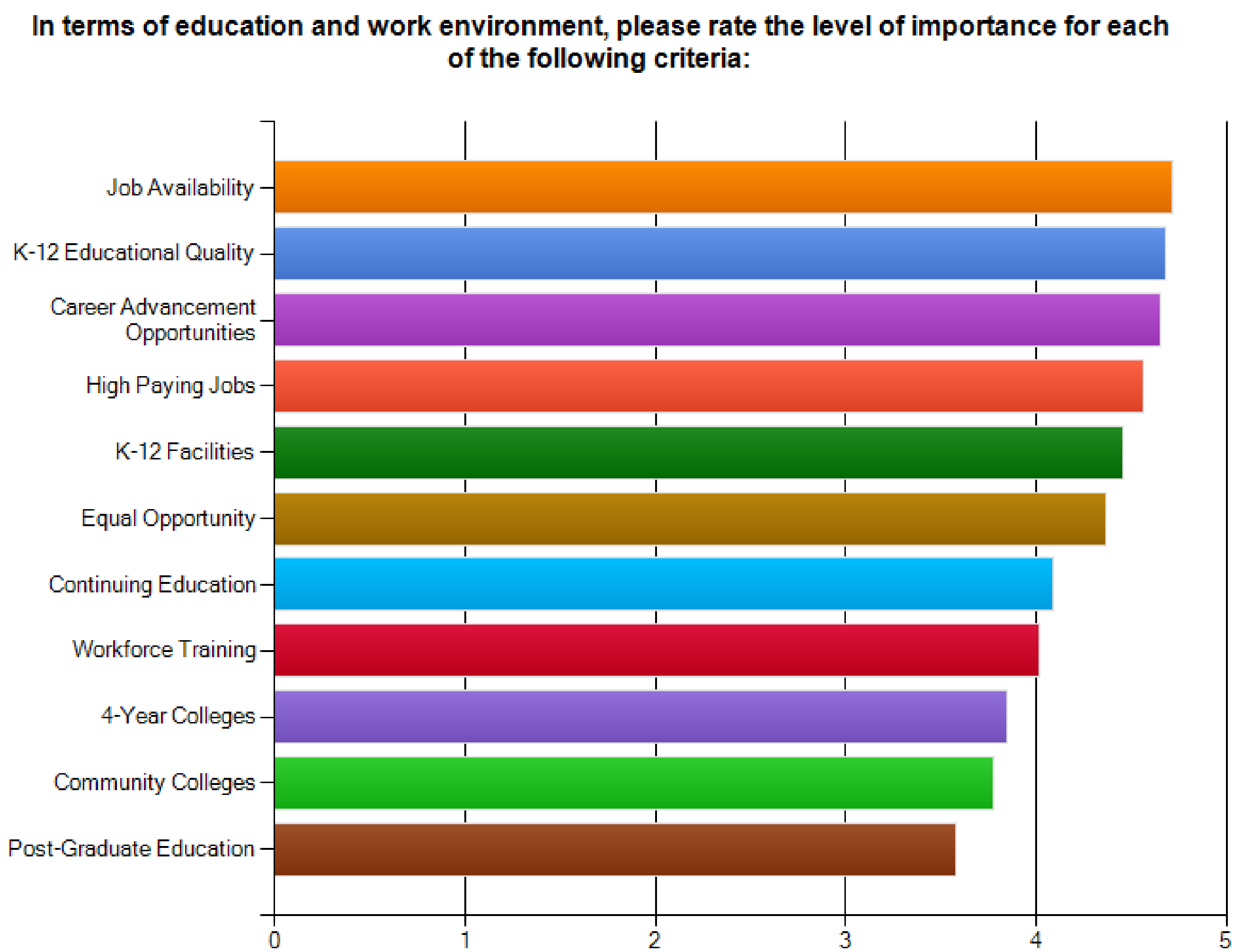

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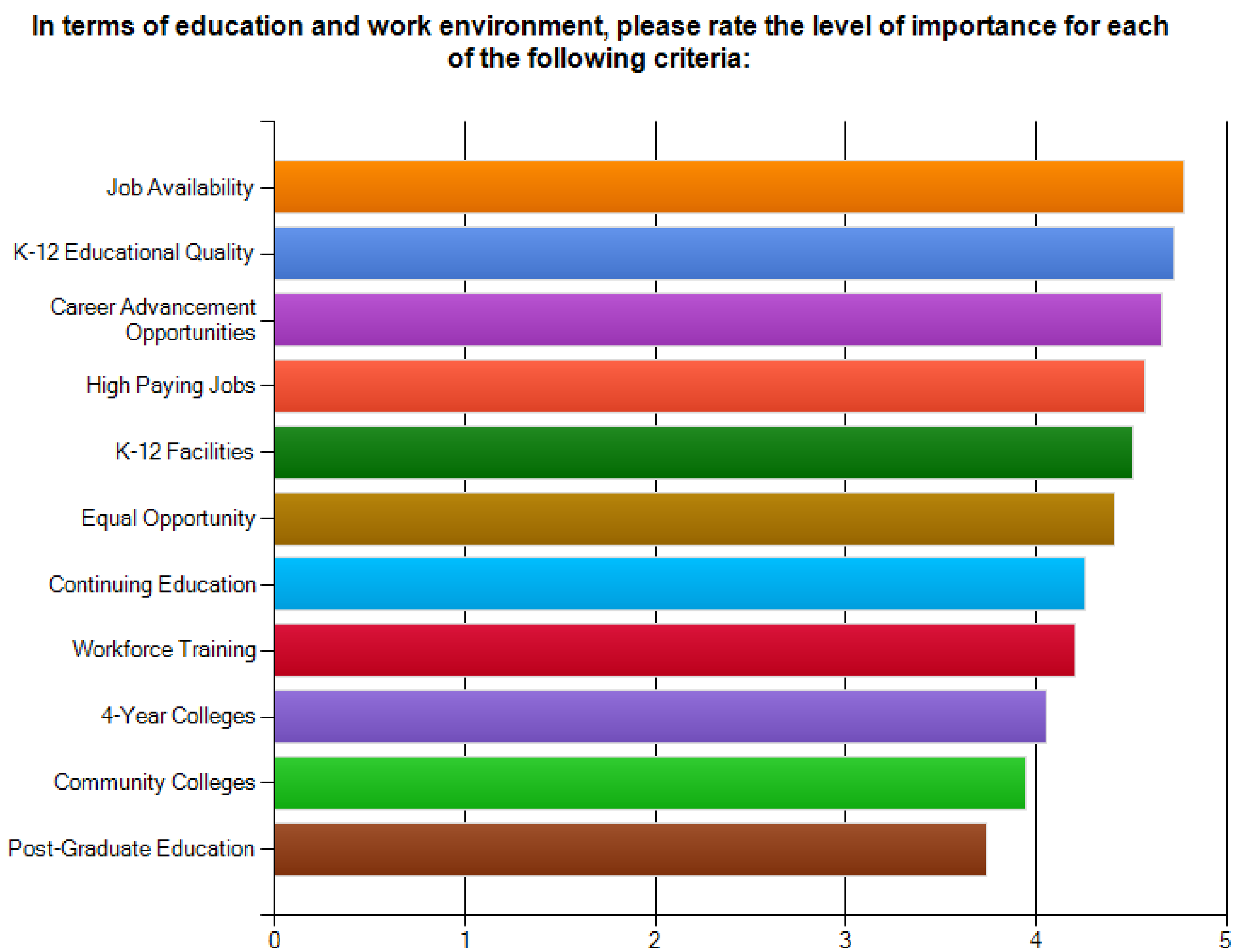

WORK OUTSIDE OF DOWNTOWN

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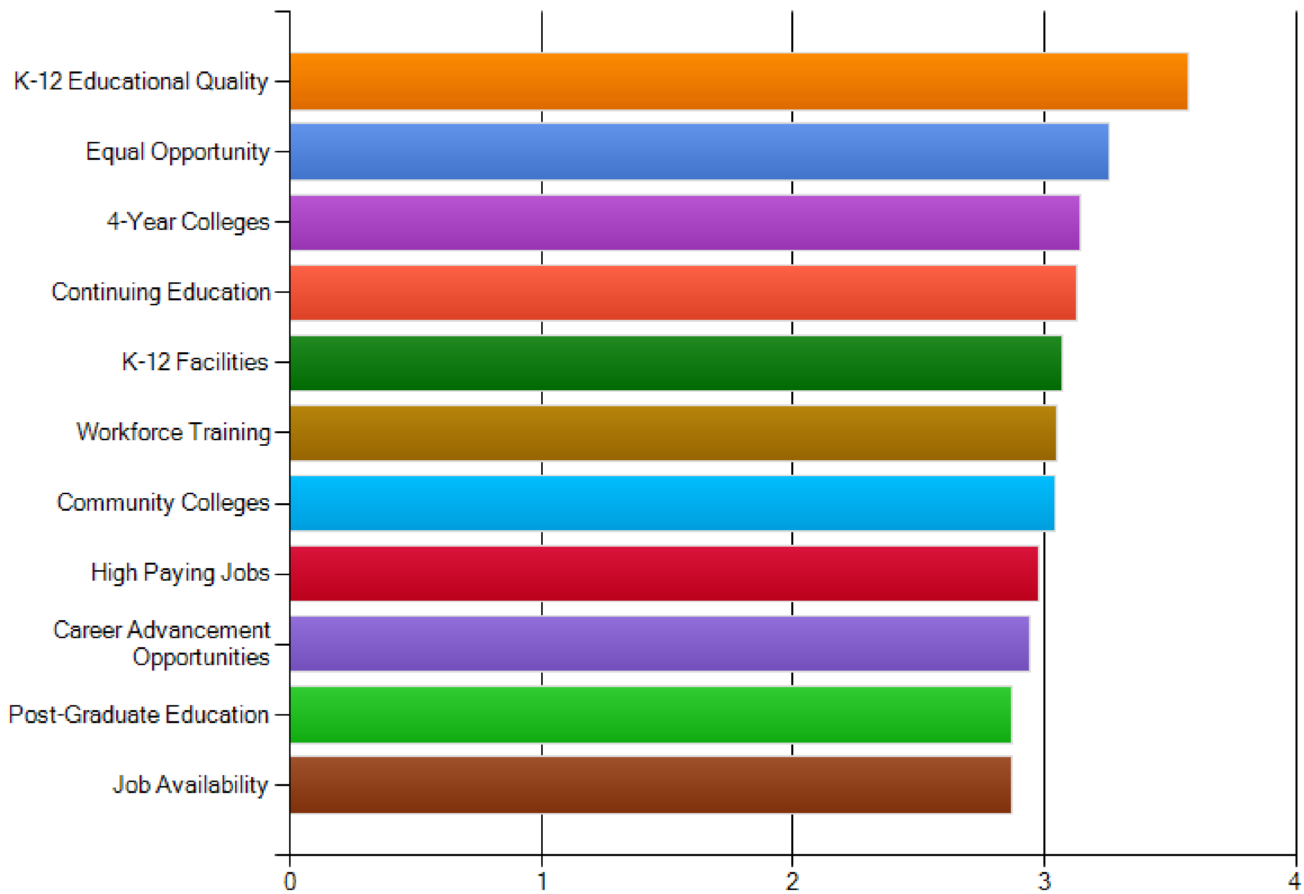
COMMUNITY SURVEY:
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)

Please rate your satisfaction with Bartlesville's education and work environment according to each of the following criteria:



WORK IN DOWNTOWN

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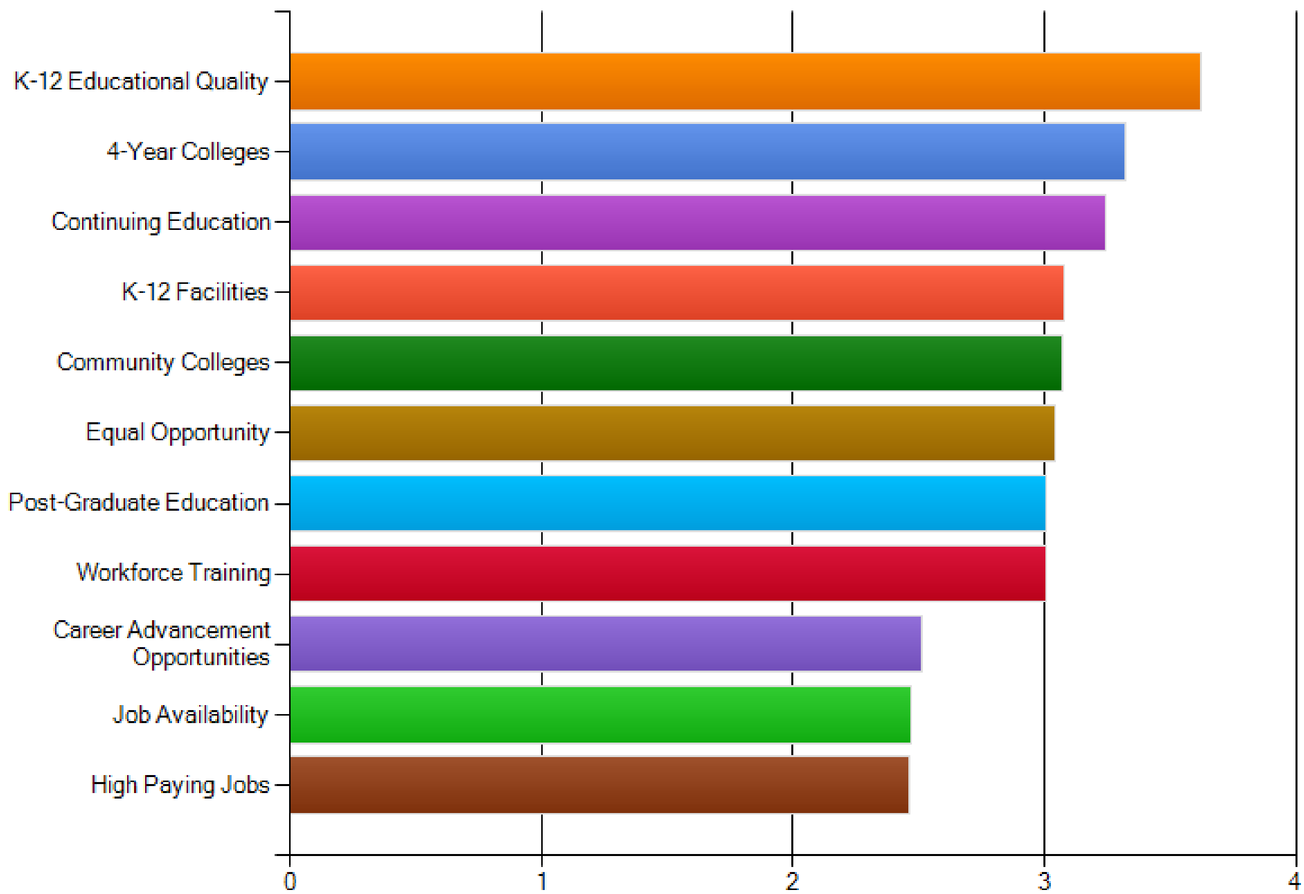
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)

Please rate your satisfaction with Bartlesville's education and work environment according to each of the following criteria:



WORK OUTSIDE OF DOWNTOWN

angeloueconomics

COMMUNITY SURVEY:
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)

WORK IN DOWNTOWN

angeloueconomics

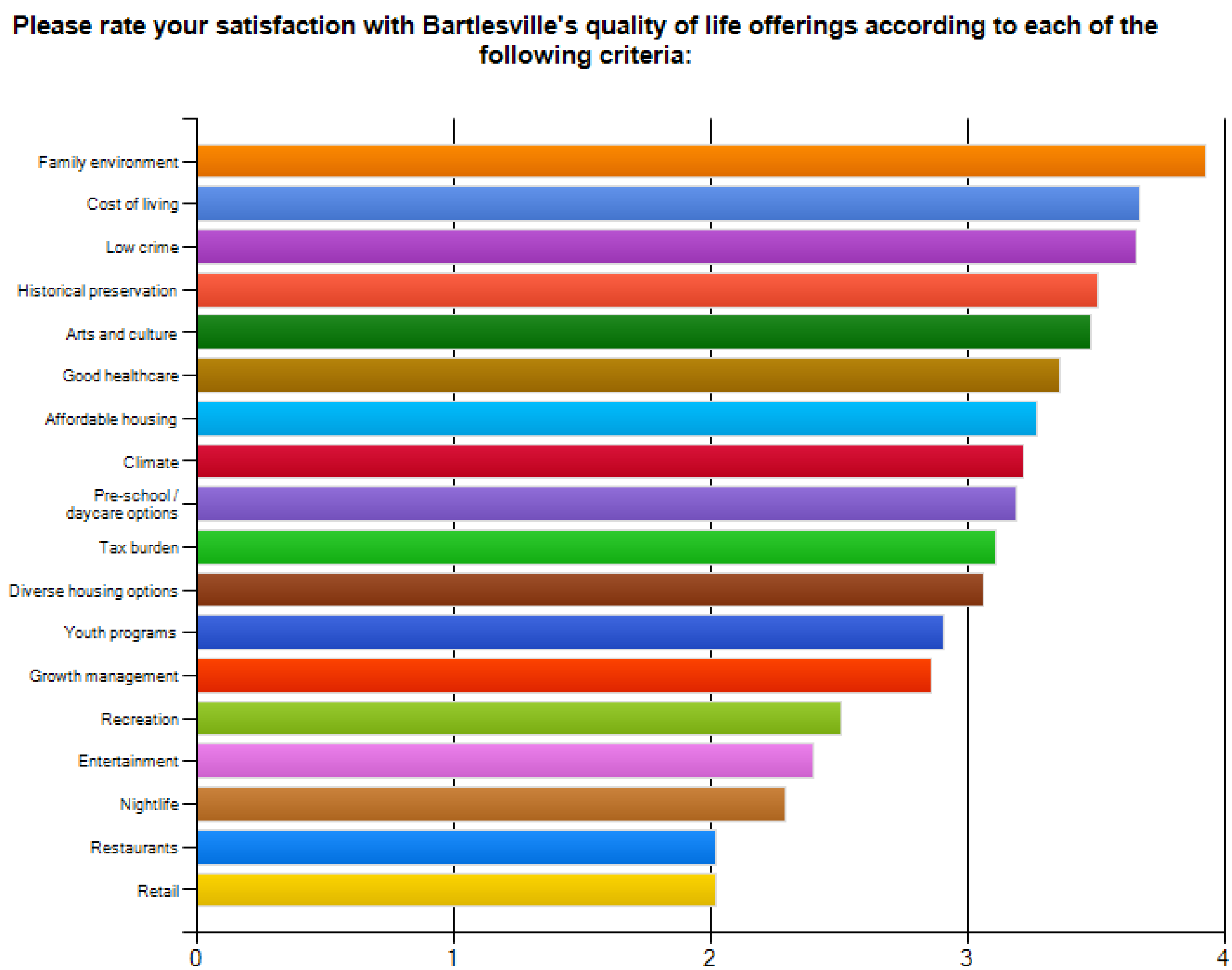
COMMUNITY SURVEY:
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)

WORK OUTSIDE OF DOWNTOWN

angeloueconomics

COMMUNITY SURVEY:

RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)

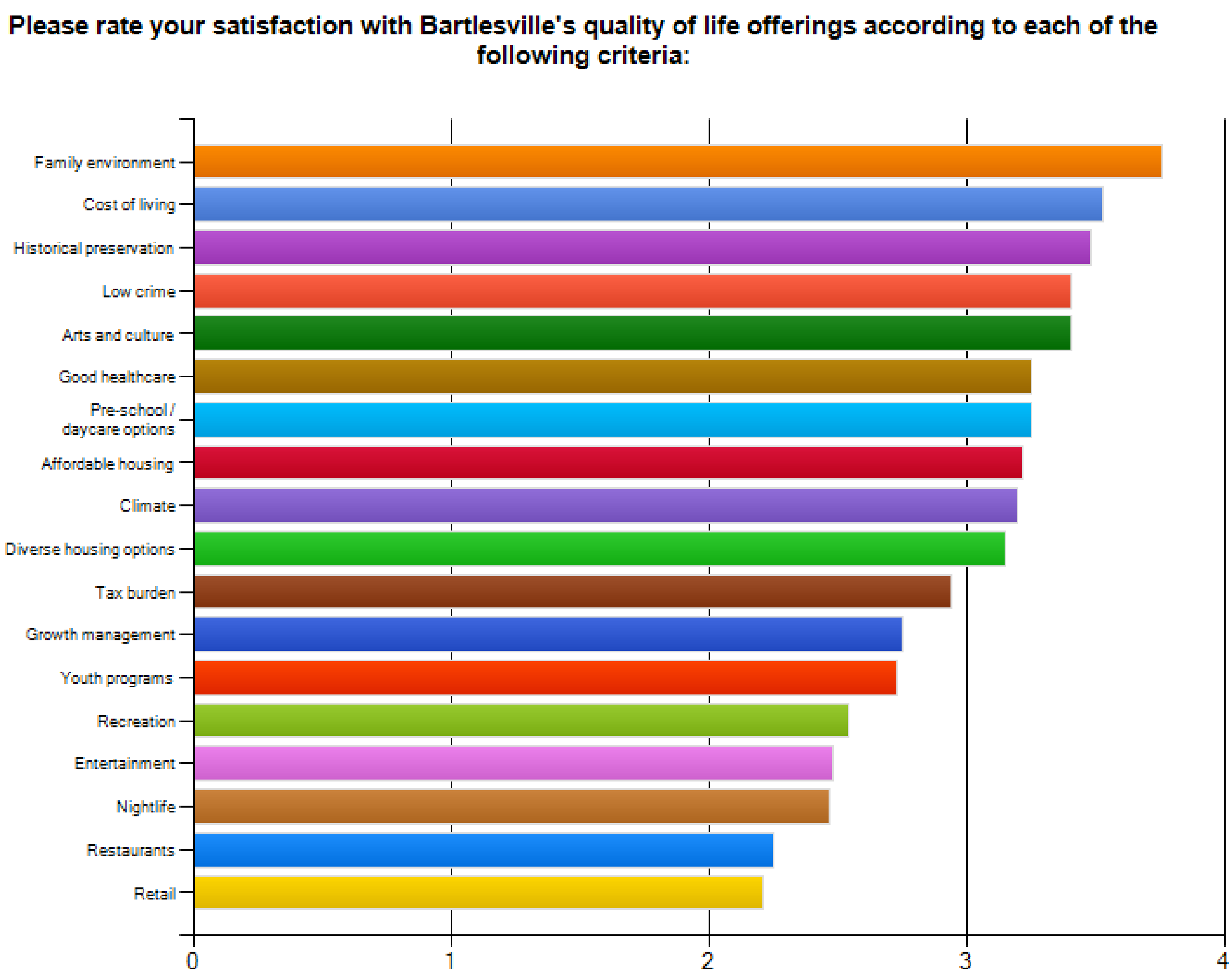


WORK IN DOWNTOWN

angeloueconomics

COMMUNITY SURVEY:

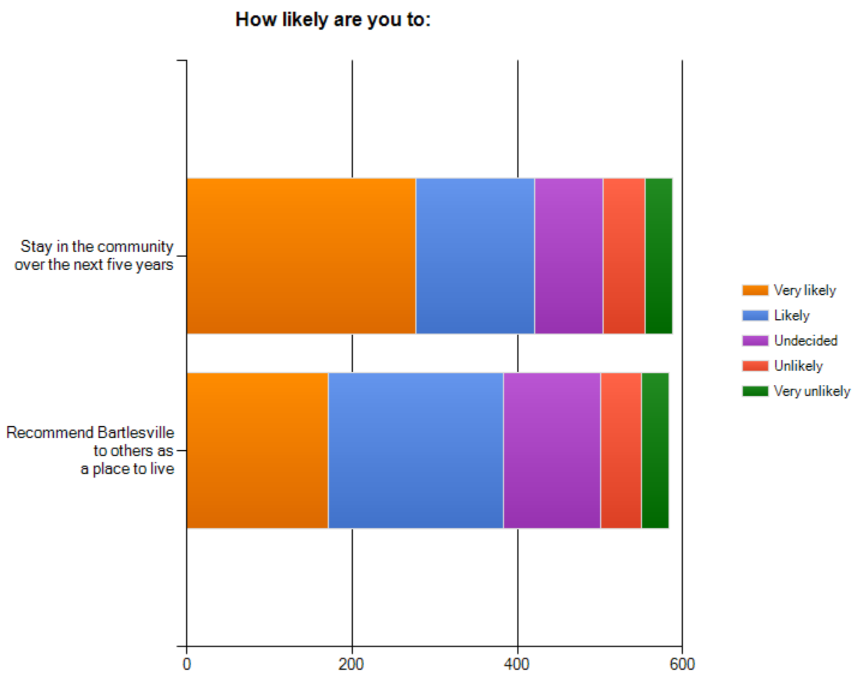
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



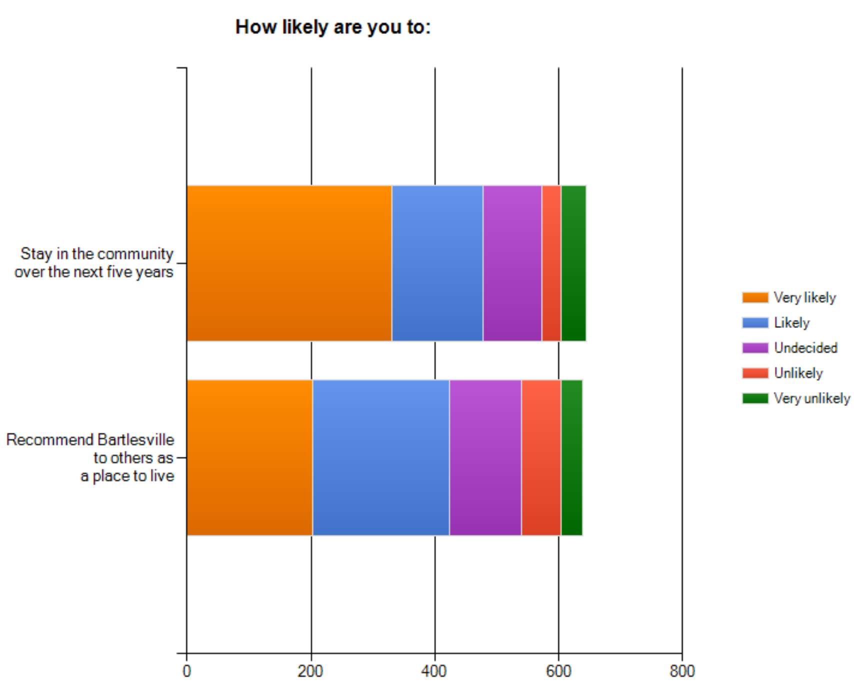
WORK OUTSIDE OF DOWNTOWN

angeloueconomics

COMMUNITY SURVEY:
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



WORK IN DOWNTOWN

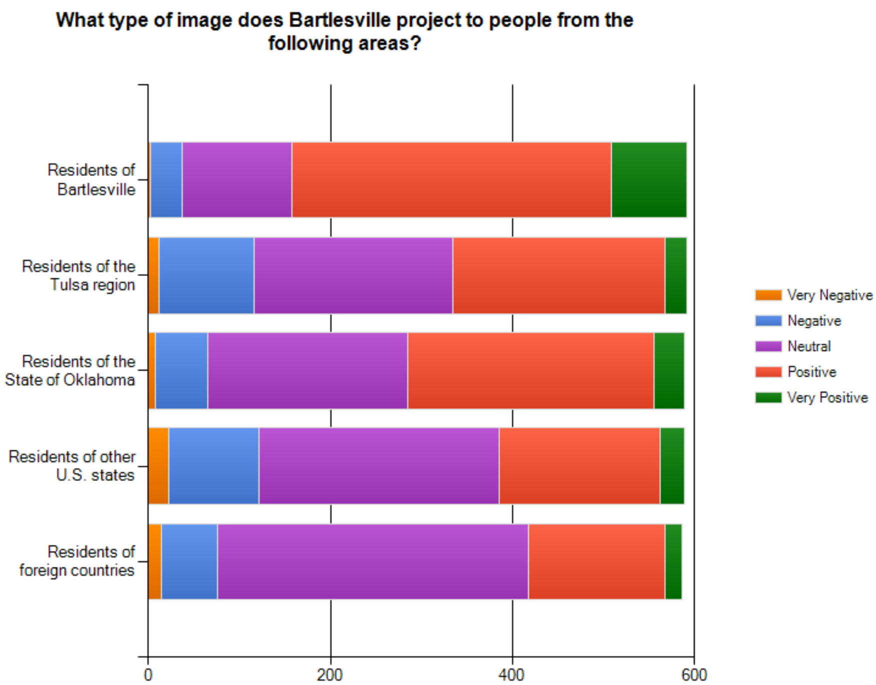


WORK OUTSIDE OF DOWNTOWN

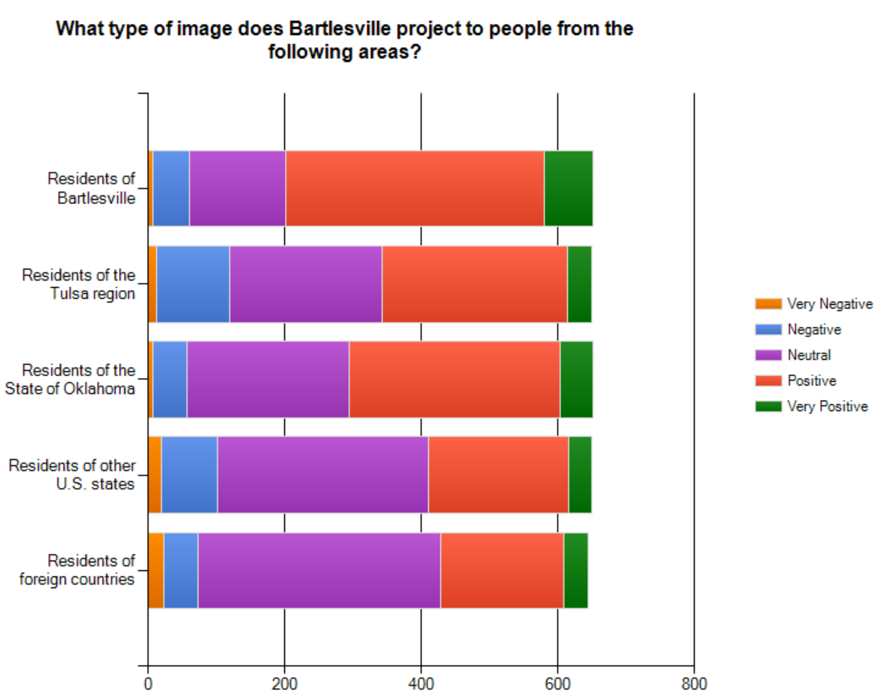
angeloueconomics

COMMUNITY SURVEY:

RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



WORK IN DOWNTOWN



WORK OUTSIDE OF DOWNTOWN

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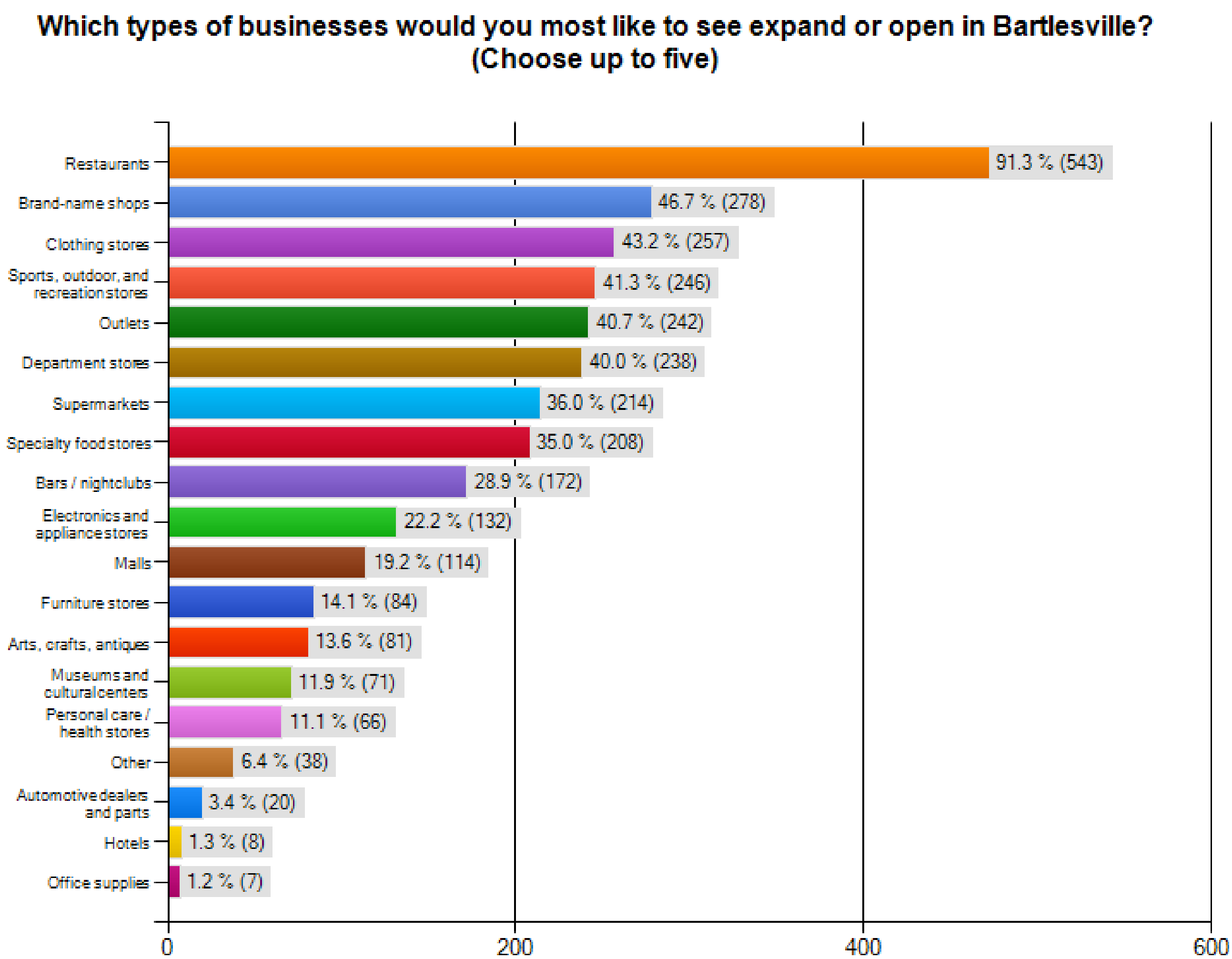
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



WORK IN DOWNTOWN

angeloueconomics

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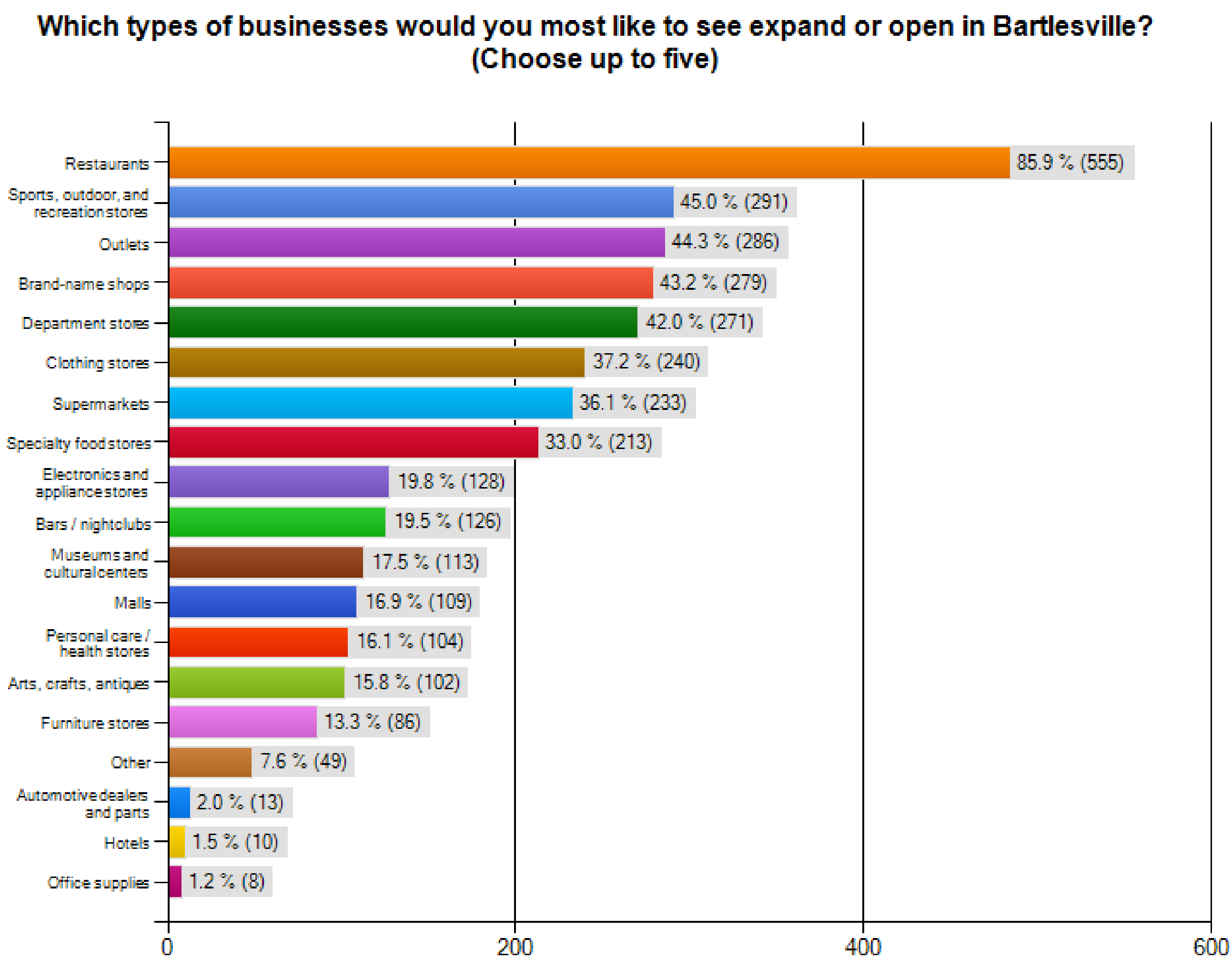
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)

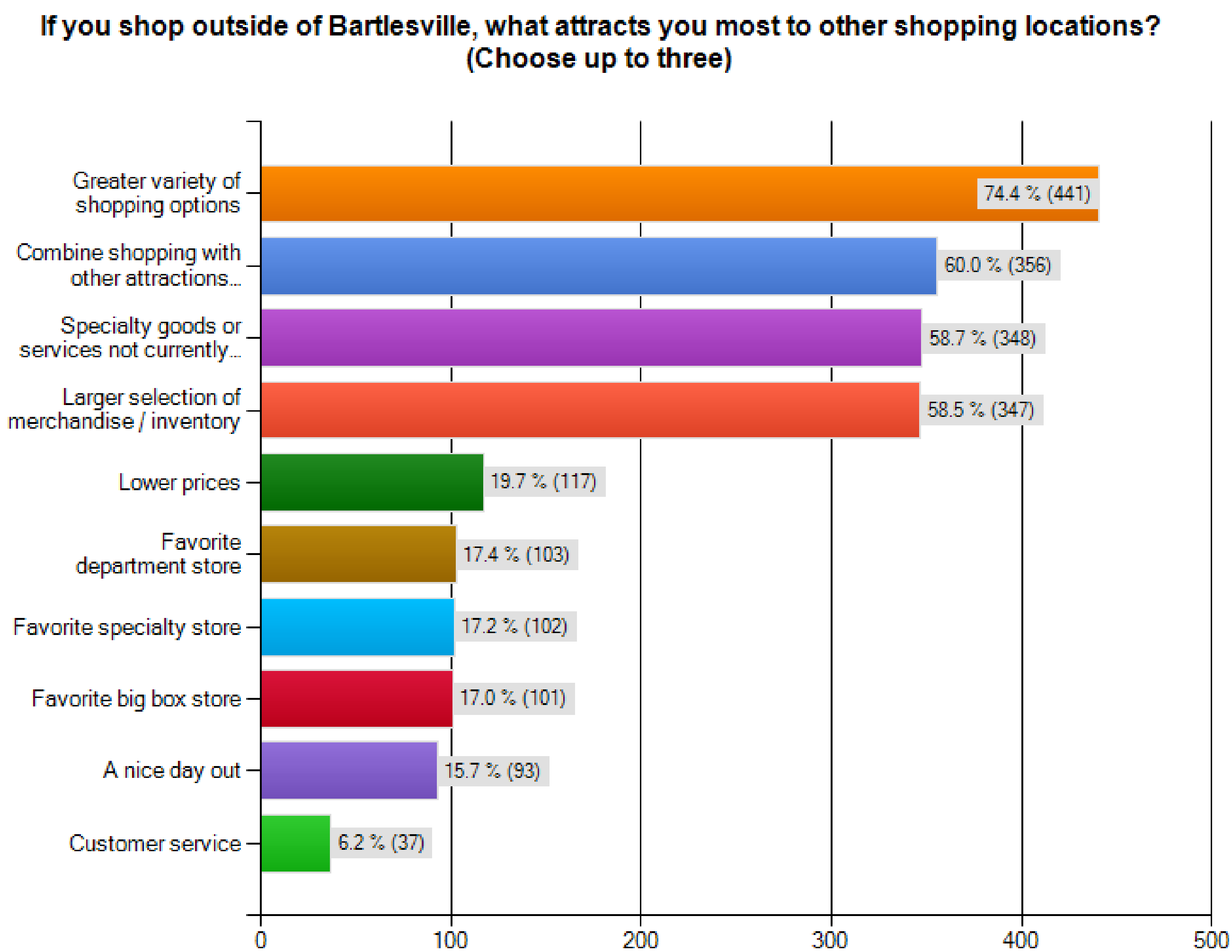


WORK OUTSIDE OF DOWNTOWN

angeloueconomics

COMMUNITY SURVEY:

RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)

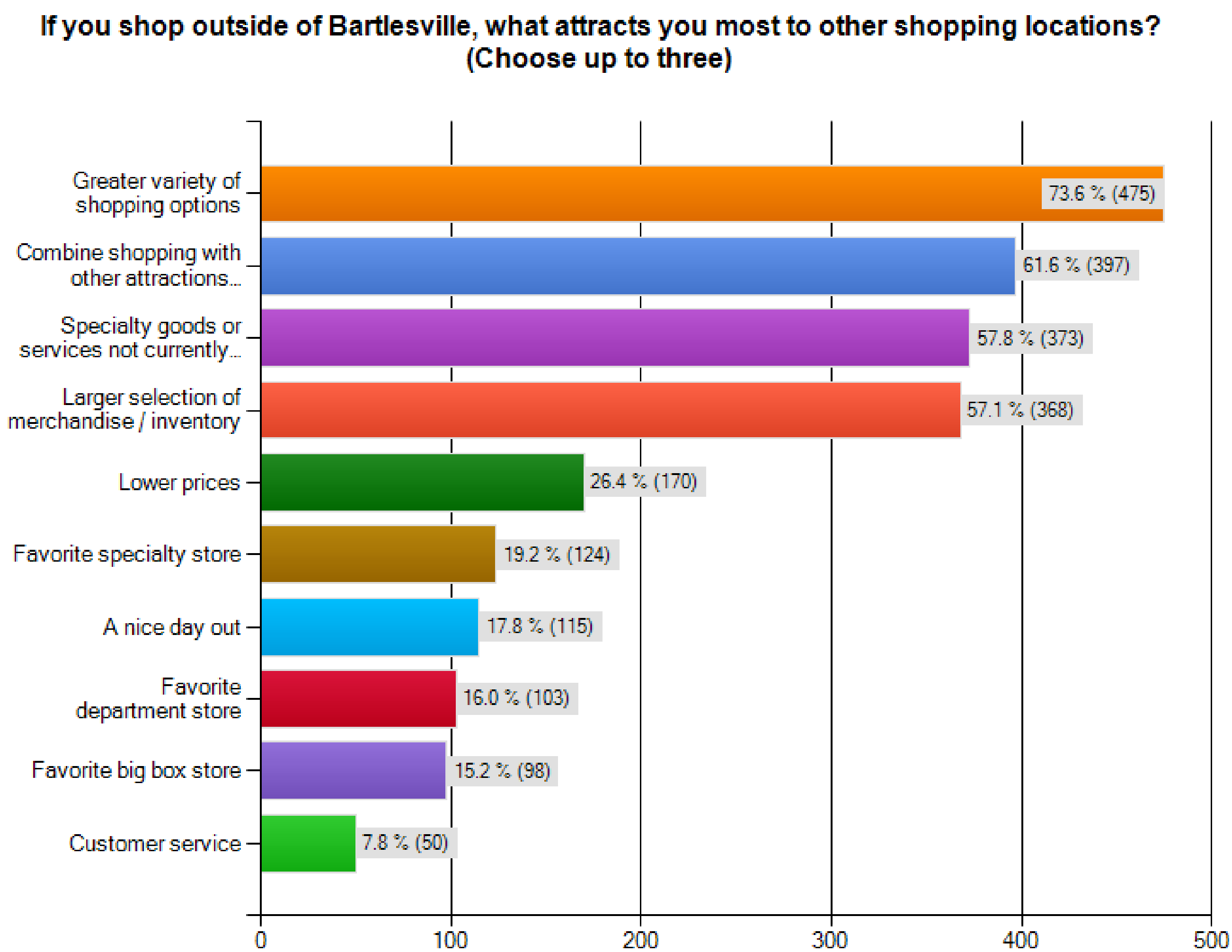


WORK IN DOWNTOWN

angeloueconomics

COMMUNITY SURVEY:

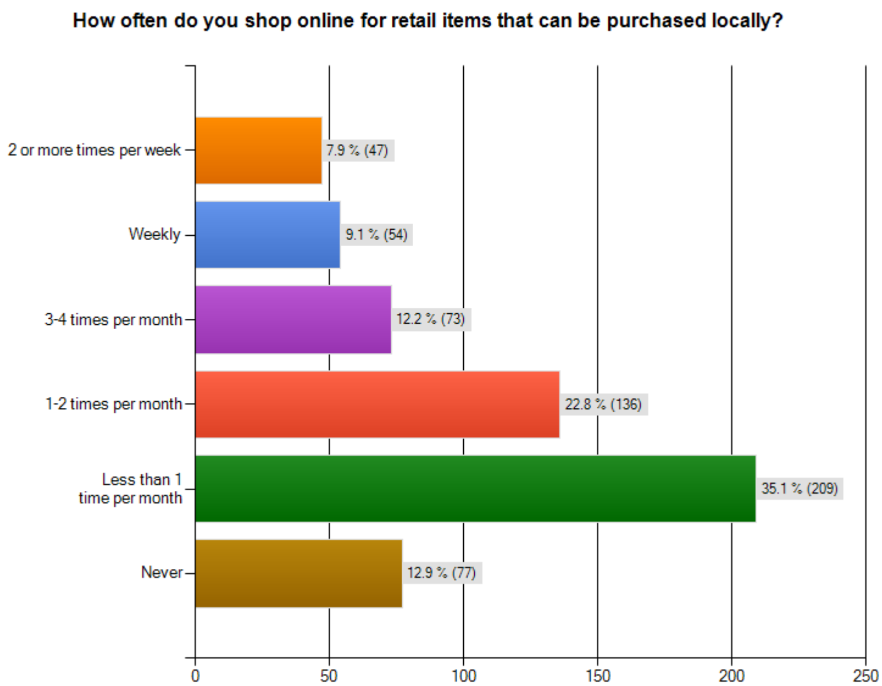
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



WORK OUTSIDE OF DOWNTOWN

angeloueconomics

COMMUNITY SURVEY:
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



WORK IN DOWNTOWN

WORK OUTSIDE OF DOWNTOWN

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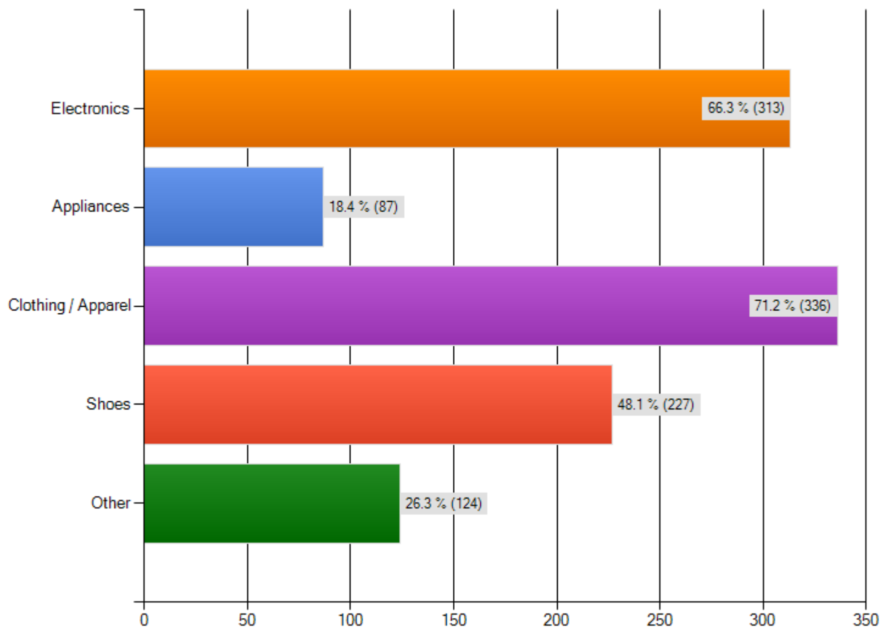
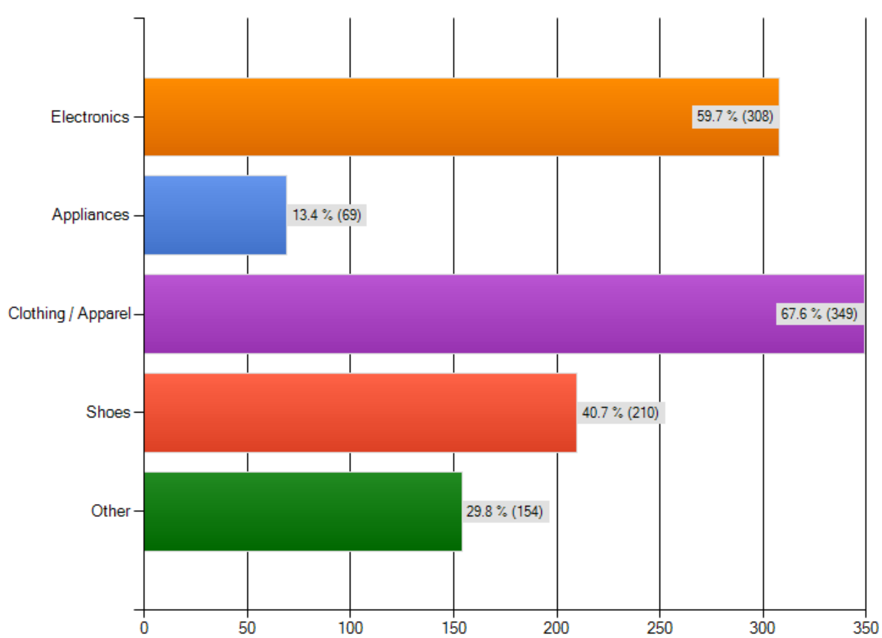
COMMUNITY SURVEY:
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)

Do you regularly shop online for any of the following items? (select all that apply)



WORK IN DOWNTOWN

Do you regularly shop online for any of the following items? (select all that apply)



WORK OUTSIDE OF DOWNTOWN

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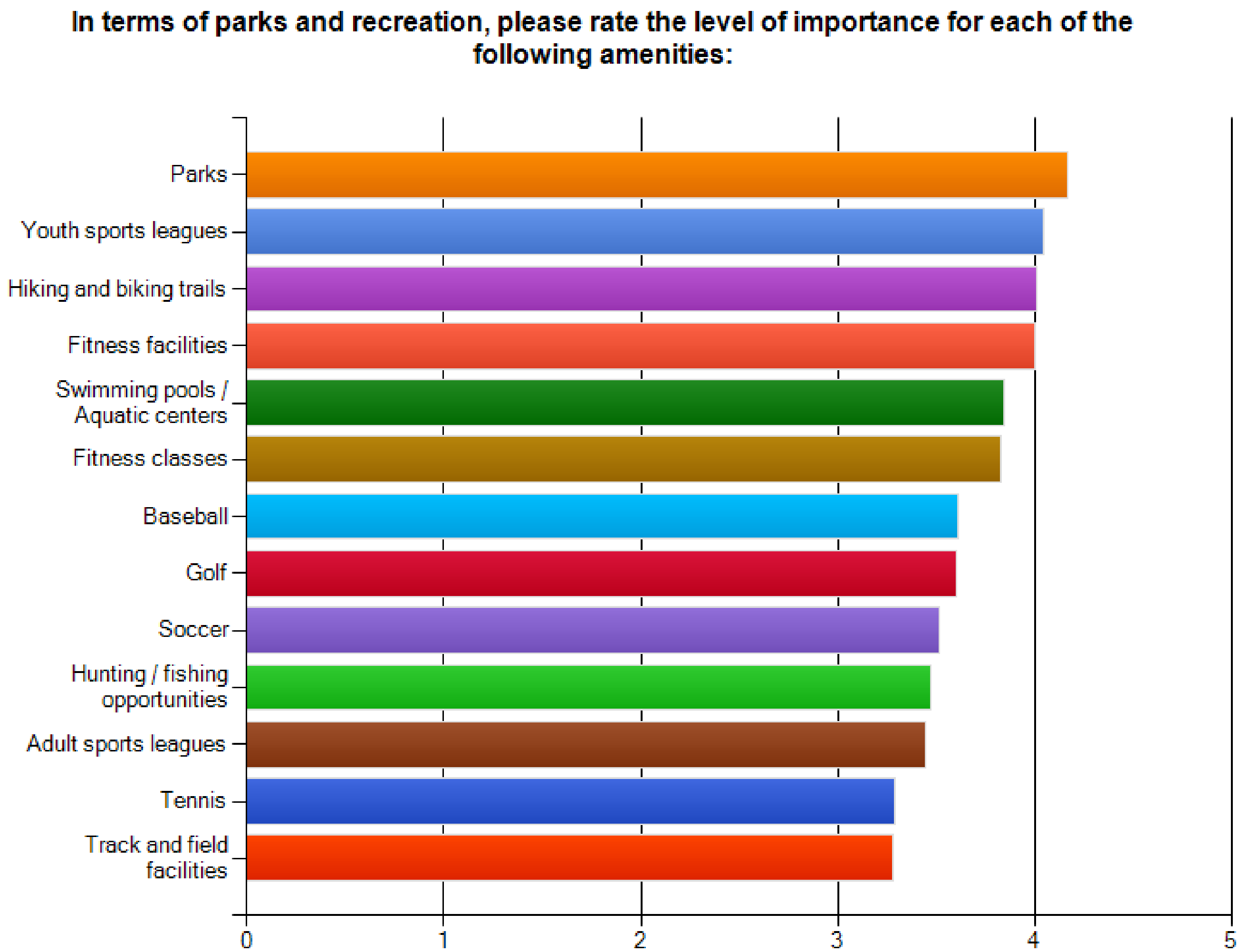
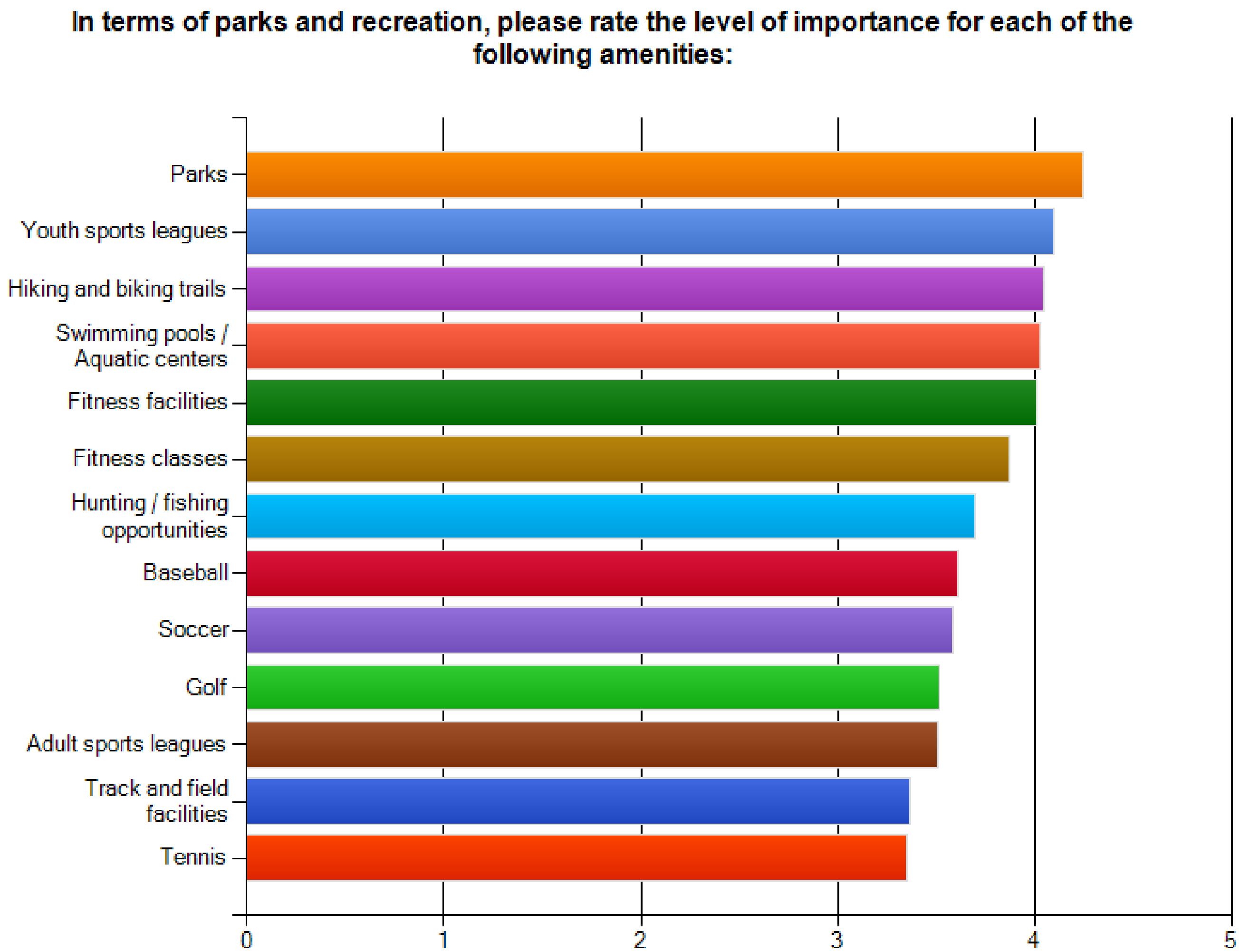
COMMUNITY SURVEY:
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



WORK IN DOWNTOWN

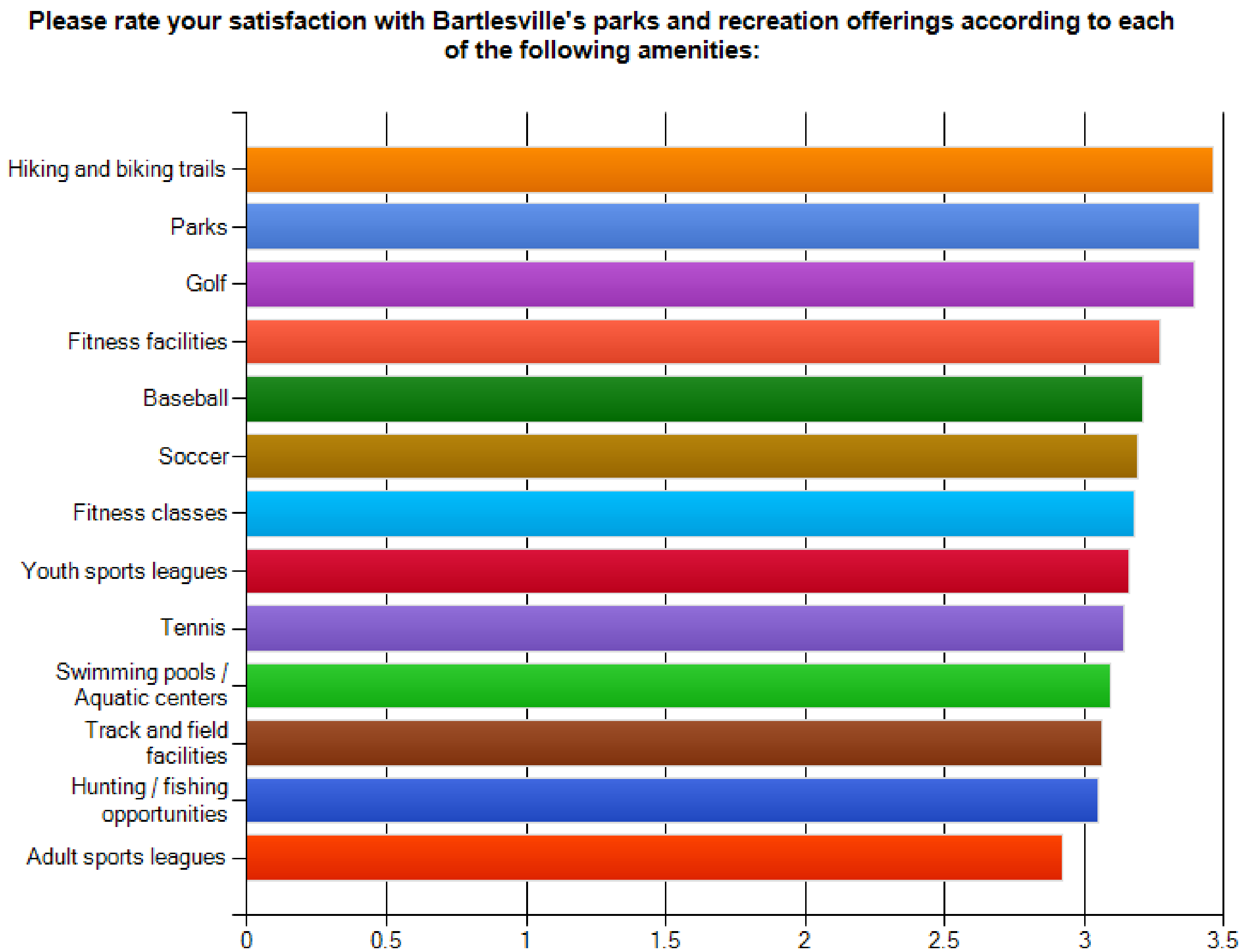
COMMUNITY SURVEY:

RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



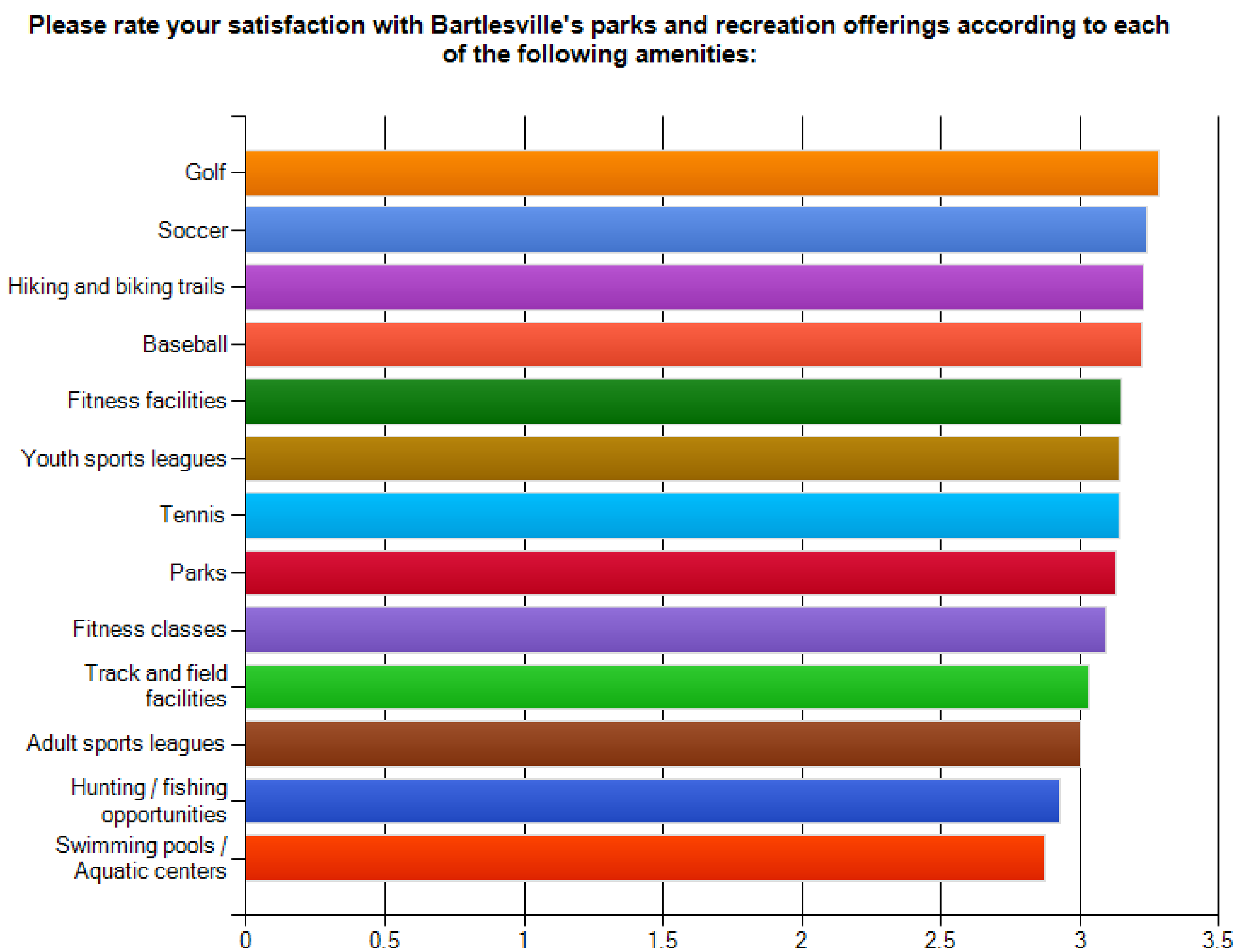
WORK OUTSIDE OF DOWNTOWN

COMMUNITY SURVEY:
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



WORK IN DOWNTOWN

COMMUNITY SURVEY:
RESPONSES BY WORK LOCATION (DOWNTOWN, OUTSIDE OF DOWNTOWN)



WORK OUTSIDE OF DOWNTOWN

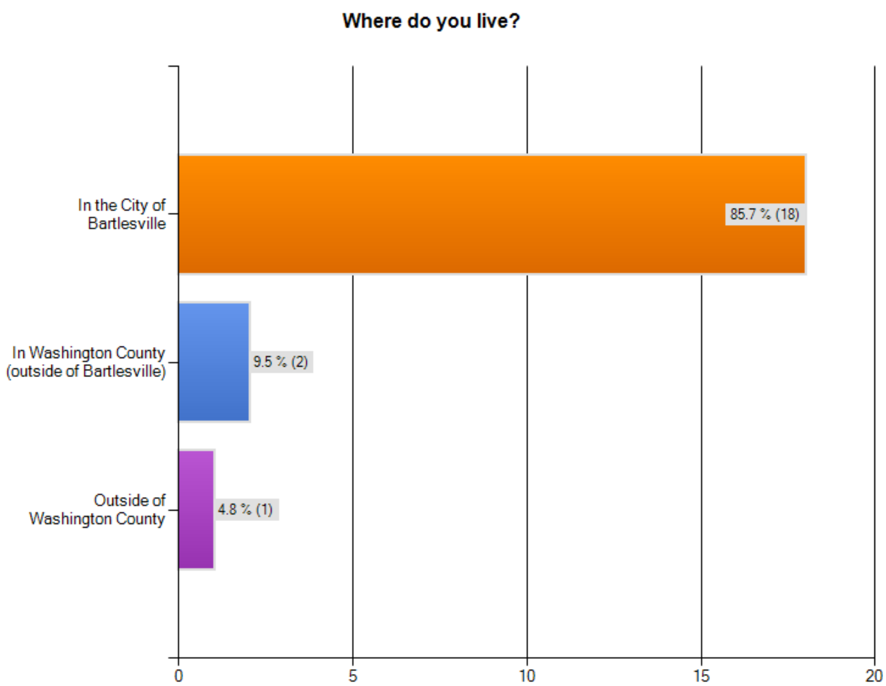
APPENDIX B: DETAILED BUSINESS SURVEY RESULTS

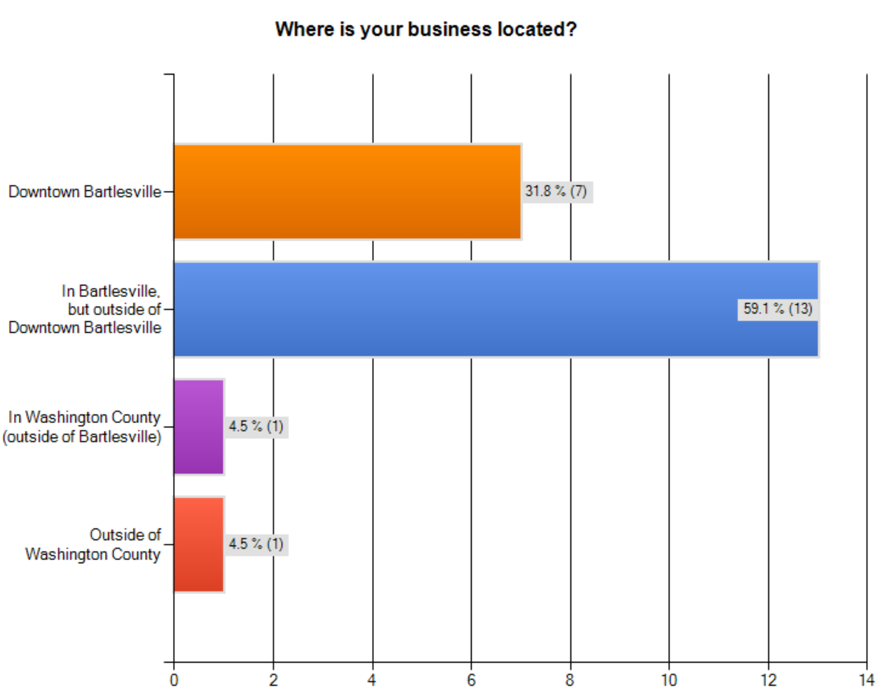
BARTLESVILLE BUSINESS SURVEY

As part of the data collection process, an online survey was developed to glean insight from Bartlesville retail and restaurant business owners on topics related to the Bartlesville retail market and, to a lesser extent, quality of life and economic development. The business survey was completed by 23 retail and restaurant business owners.

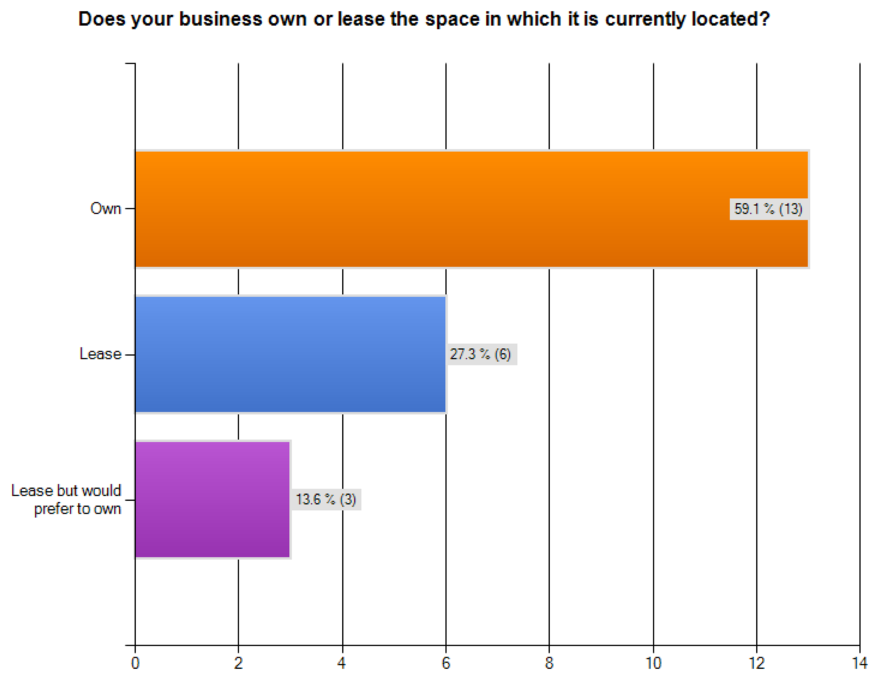
The survey remained online for a three-week period from November 9, 2012 through November 30, 2012. The following pages provide a detailed breakdown of results from the survey.

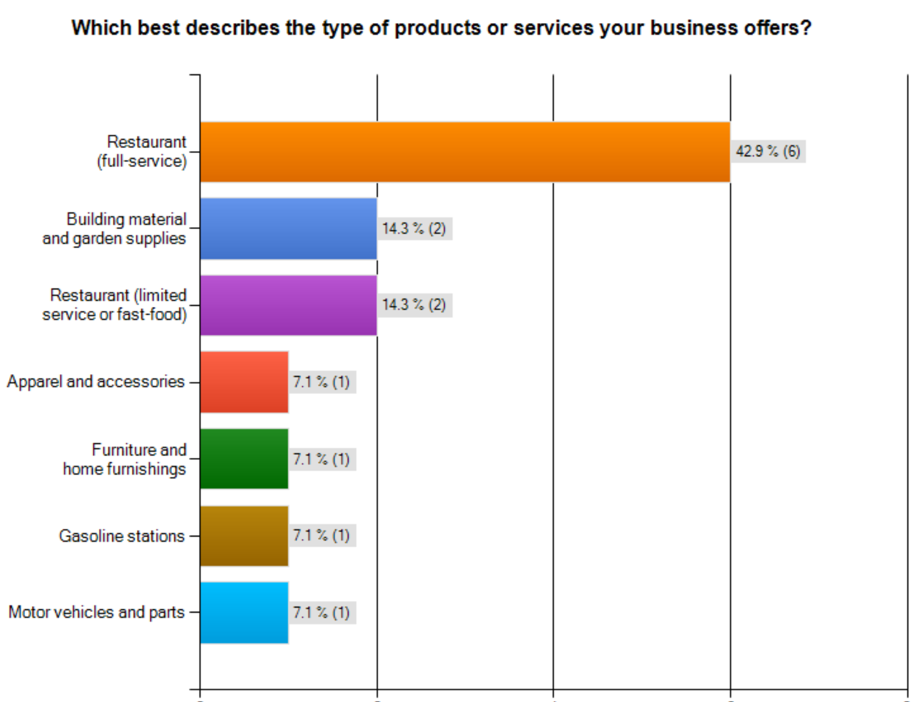
BUSINESS SURVEY





BUSINESS SURVEY

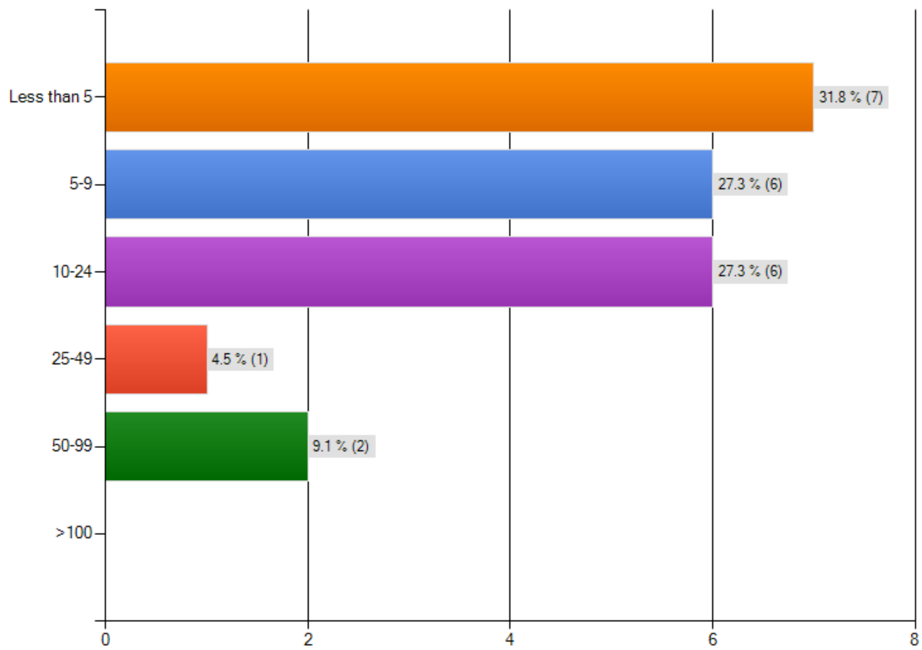




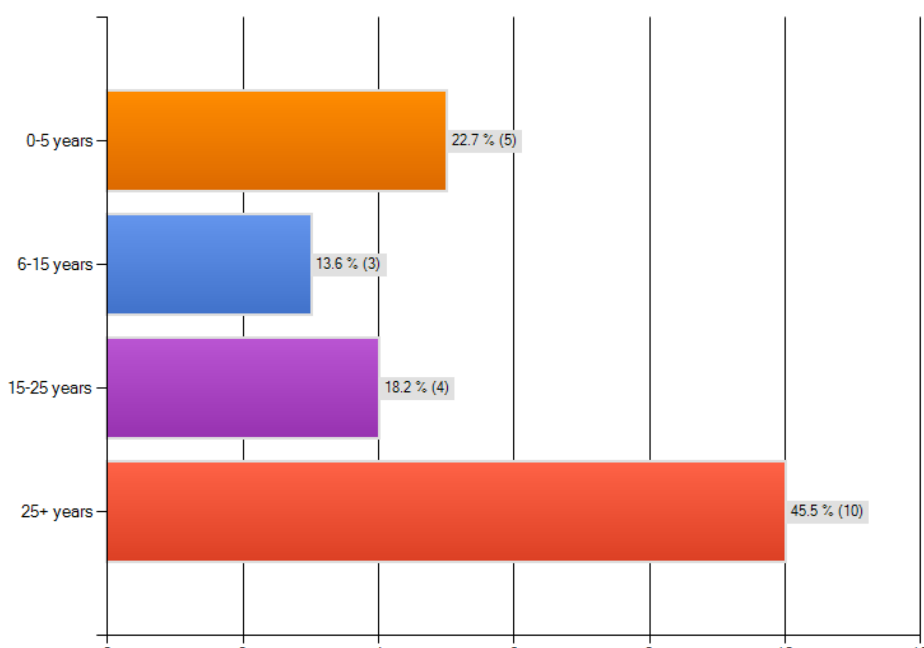
9 Write-in responses including:
Auto repair, RVs, Alcoholic beverages, Home décor, Swimming pool supplies, photography, Florist, Kitchenware, Shoes

BUSINESS SURVEY

How many full time employees are employed by your business?

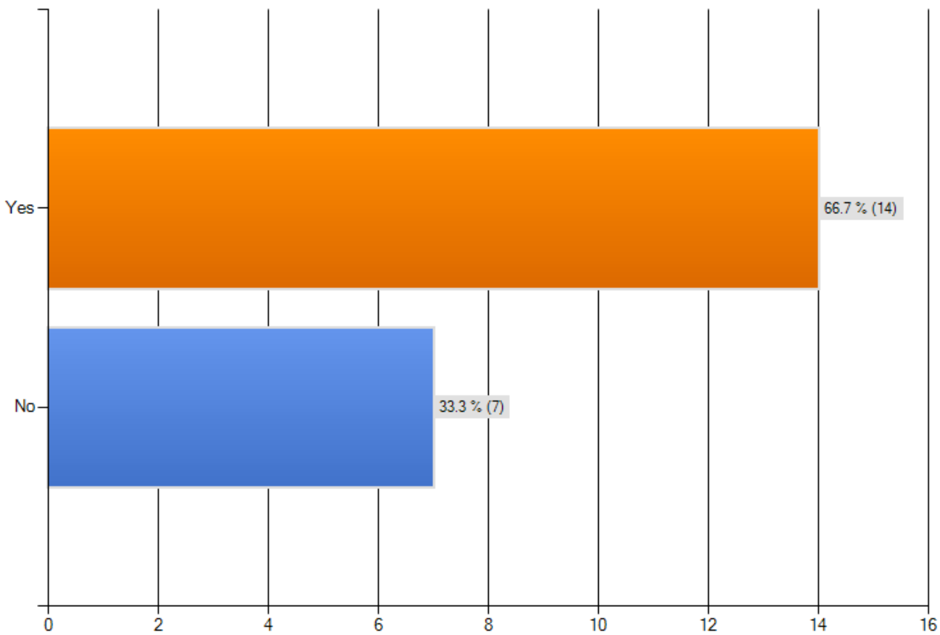


How long has your business been located within the Bartlesville region?

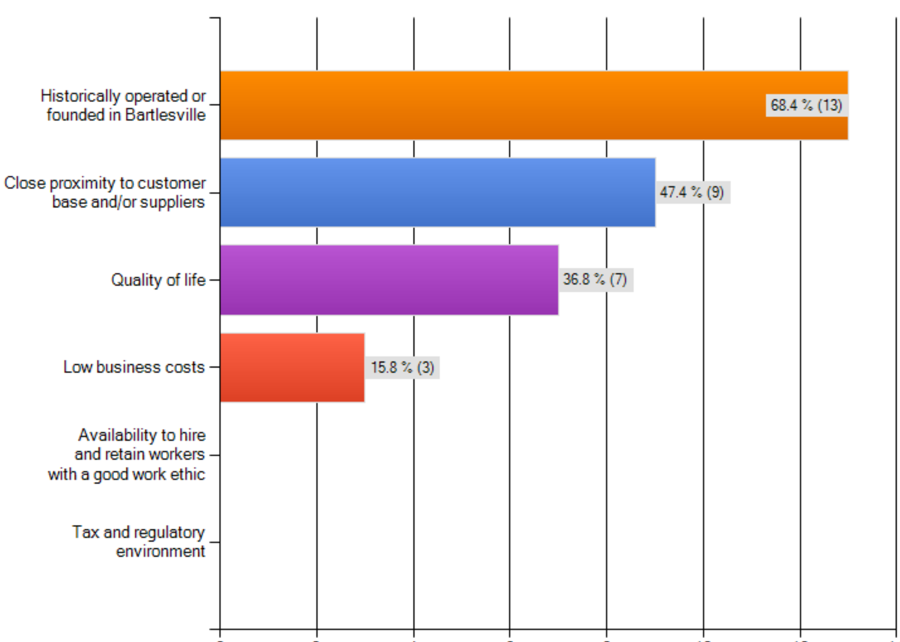


BUSINESS SURVEY

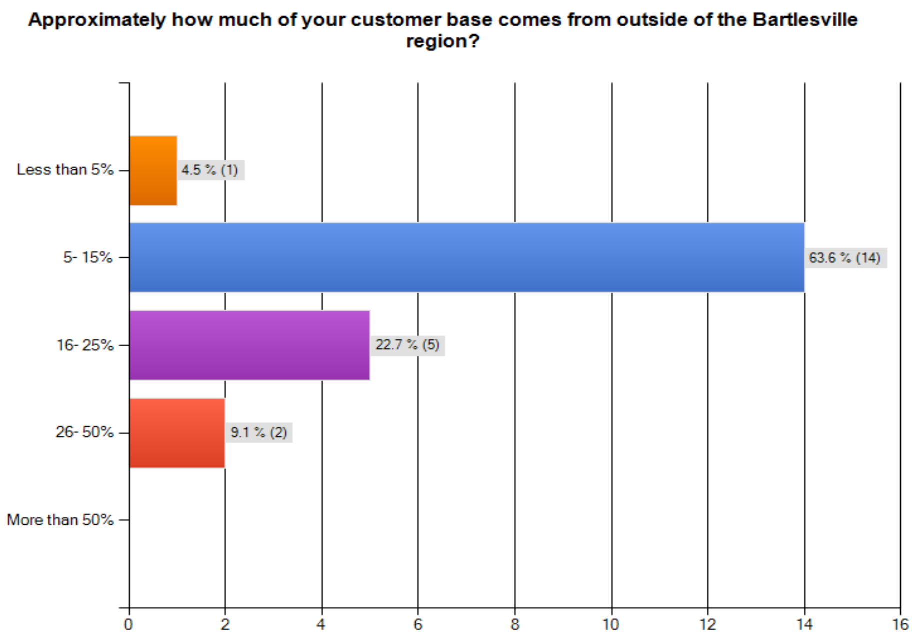
Over the next 2 years, do you anticipate expanding your services or adding a product line?

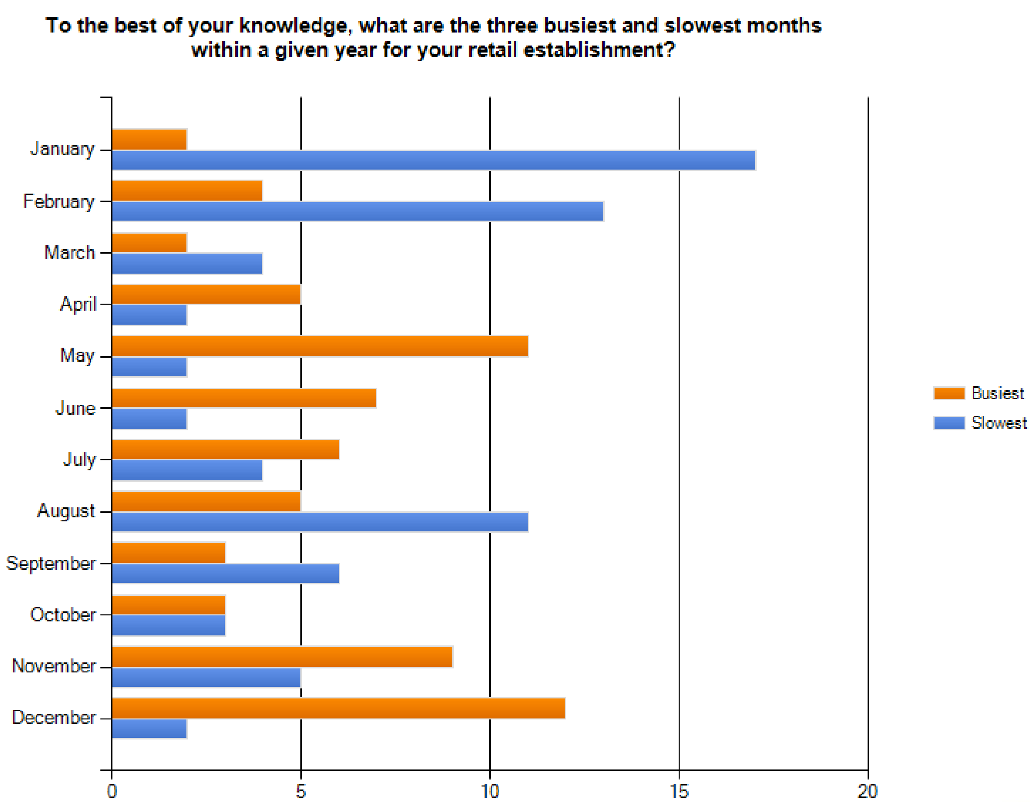


What are the three primary reasons your business is located in Bartlesville?



BUSINESS SURVEY





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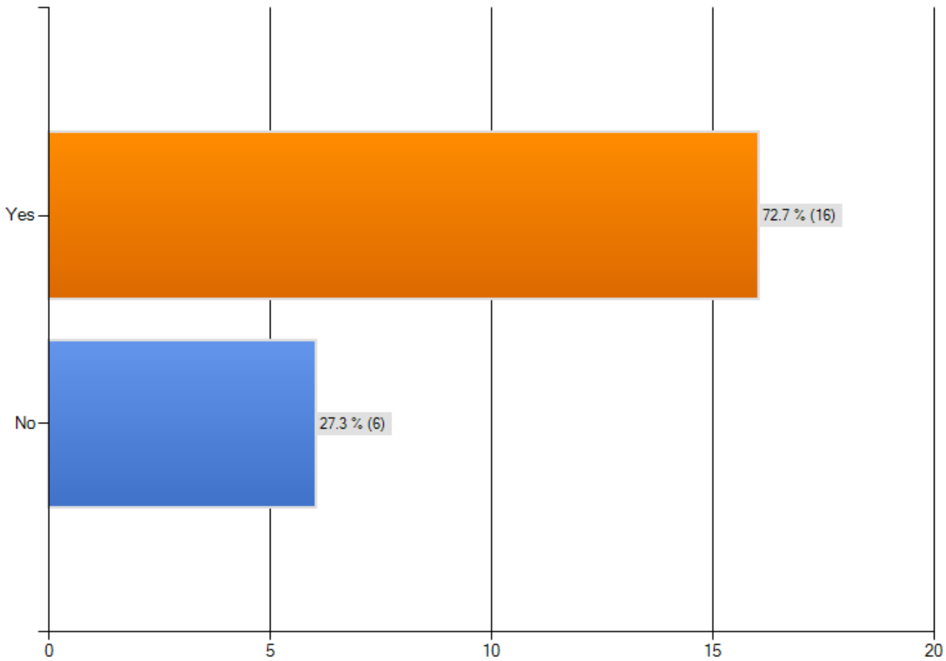
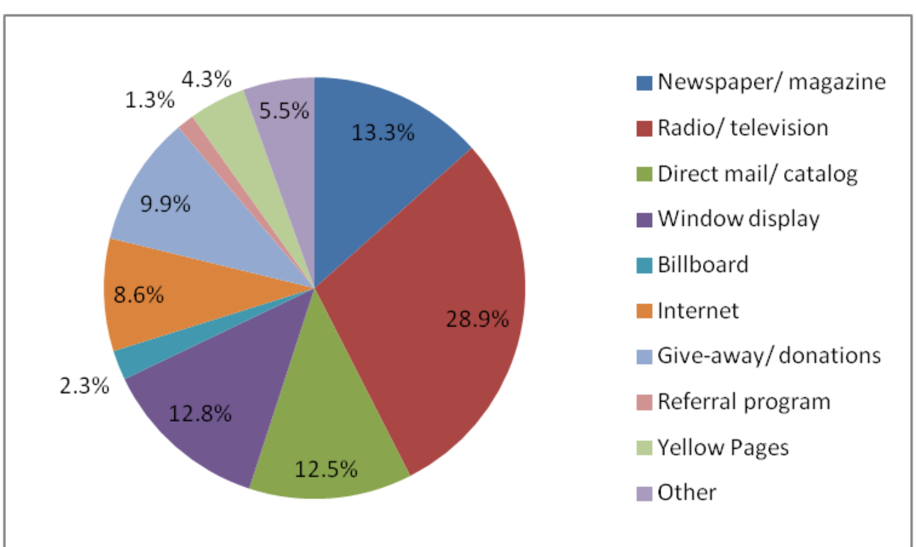
BUSINESS SURVEY

Does your business actively advertise?

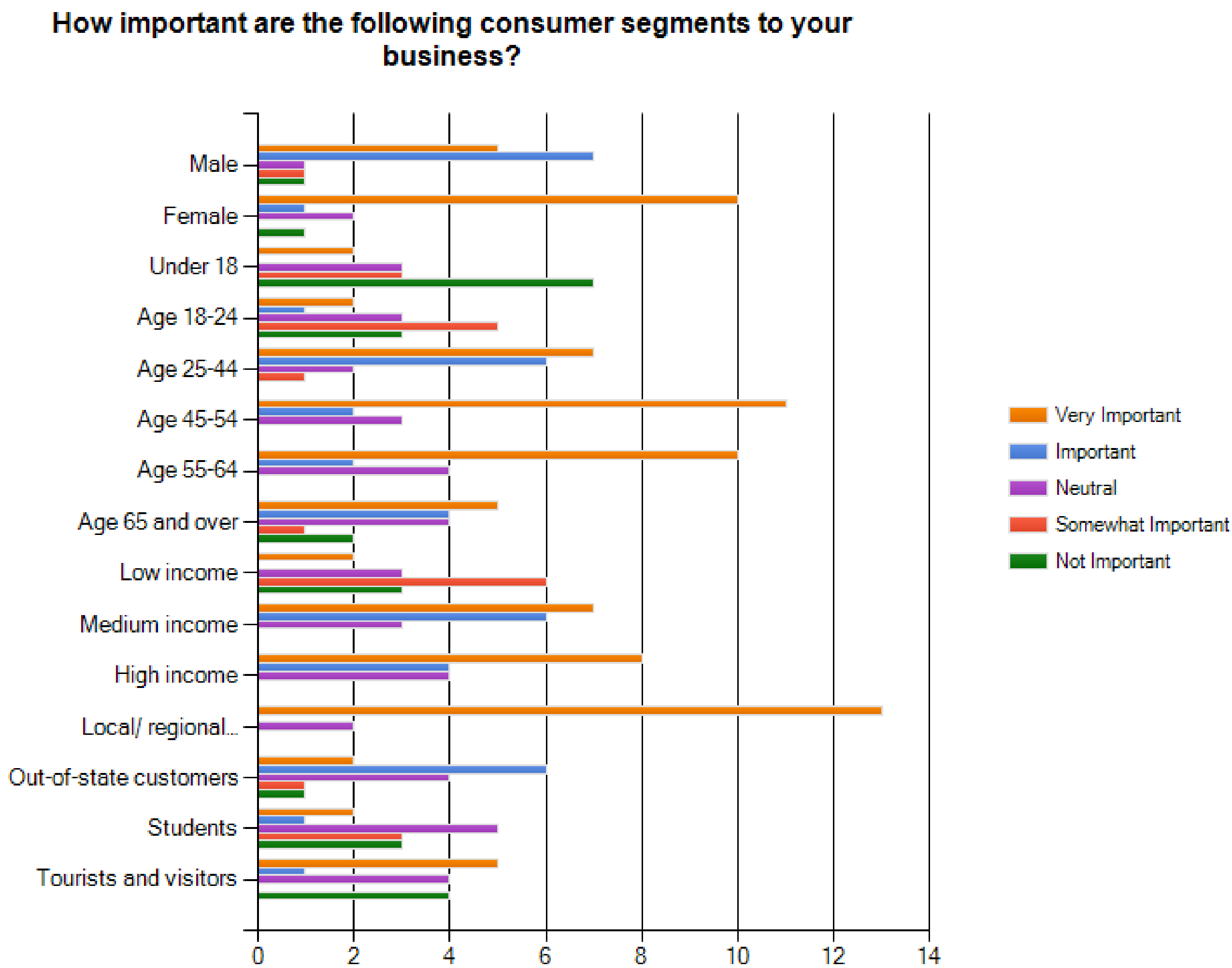


Approximately what percentage of the annual advertising budget for your business is spent with each of the following media?



BUSINESS SURVEY

BUSINESS SURVEY



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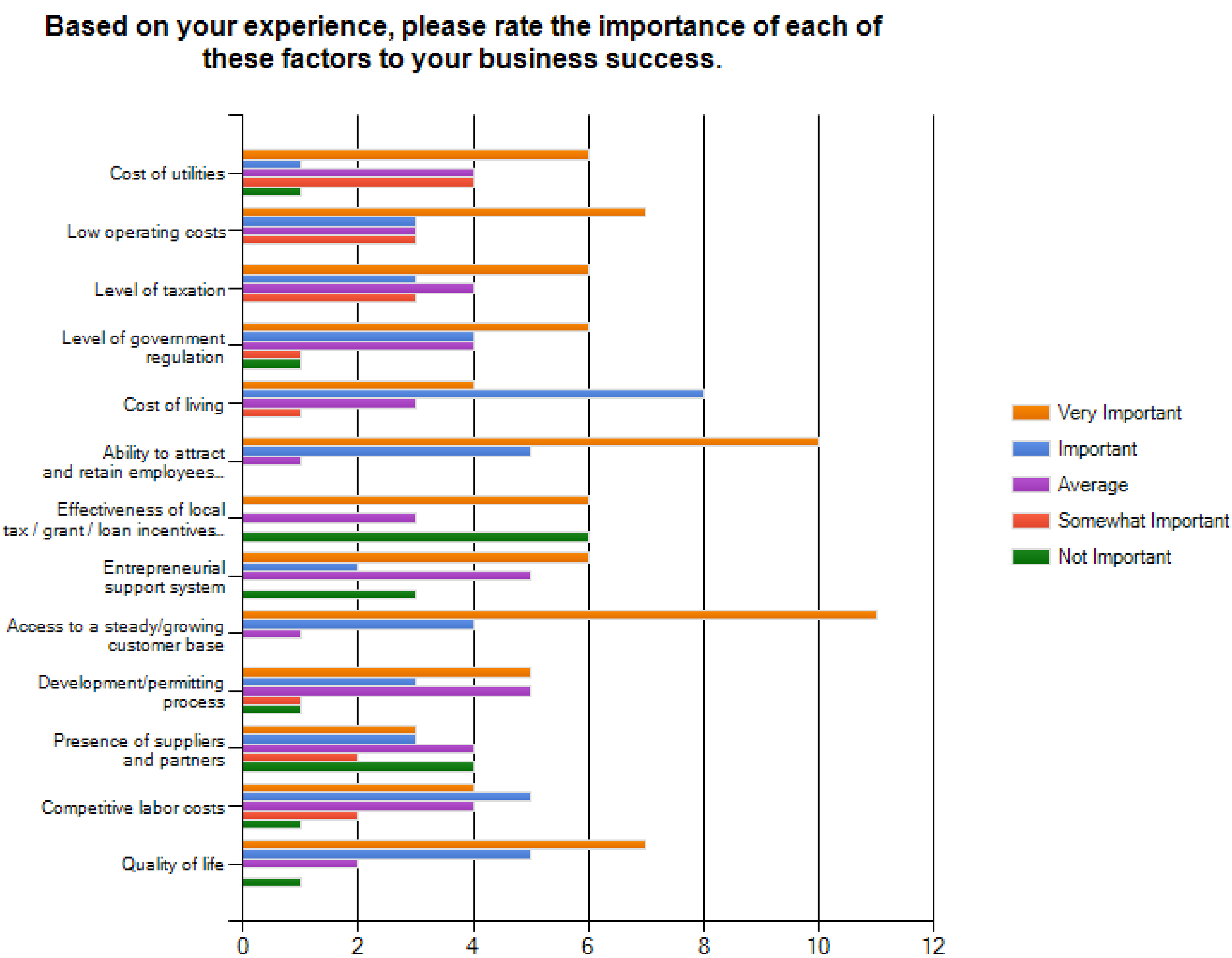
BUSINESS SURVEY



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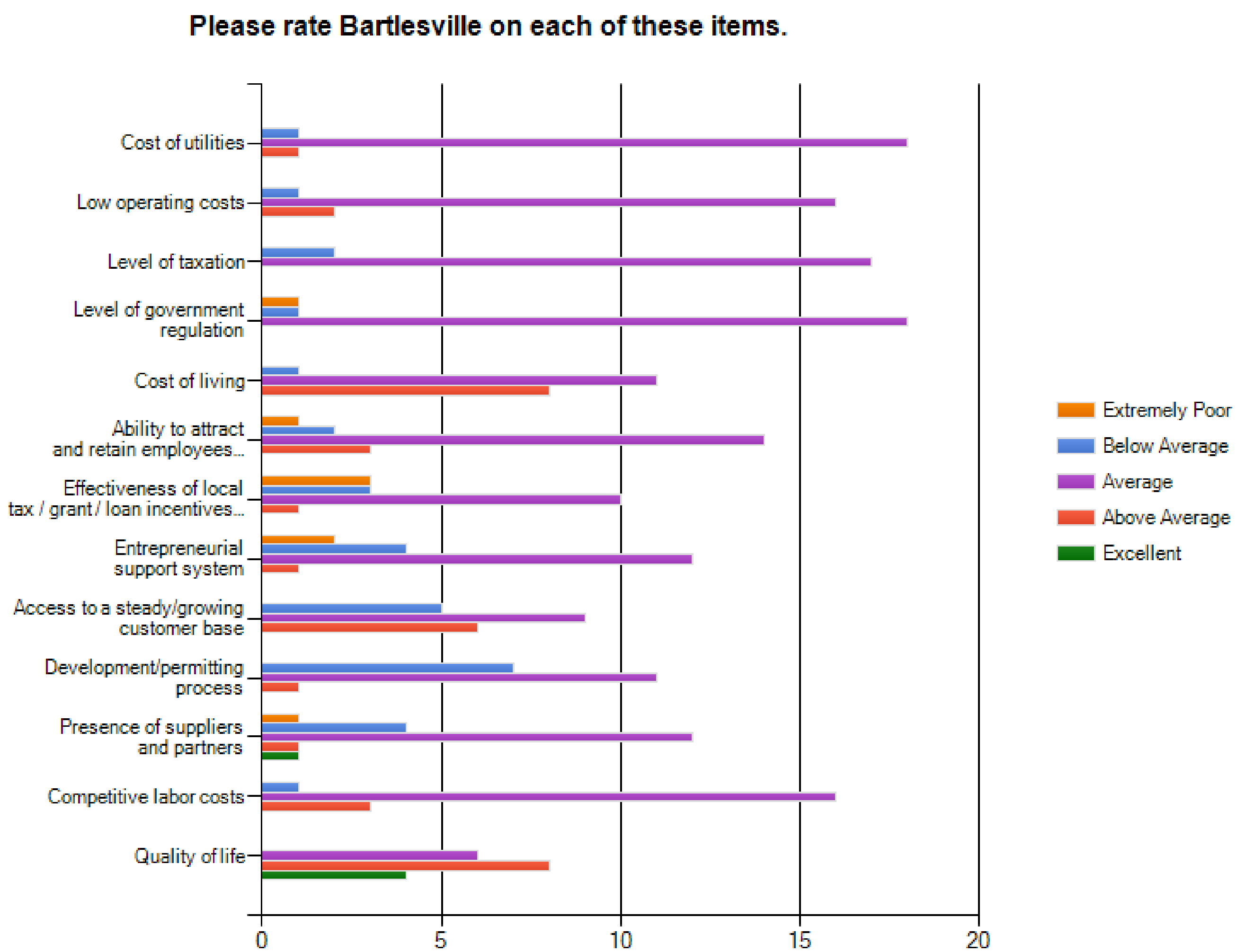
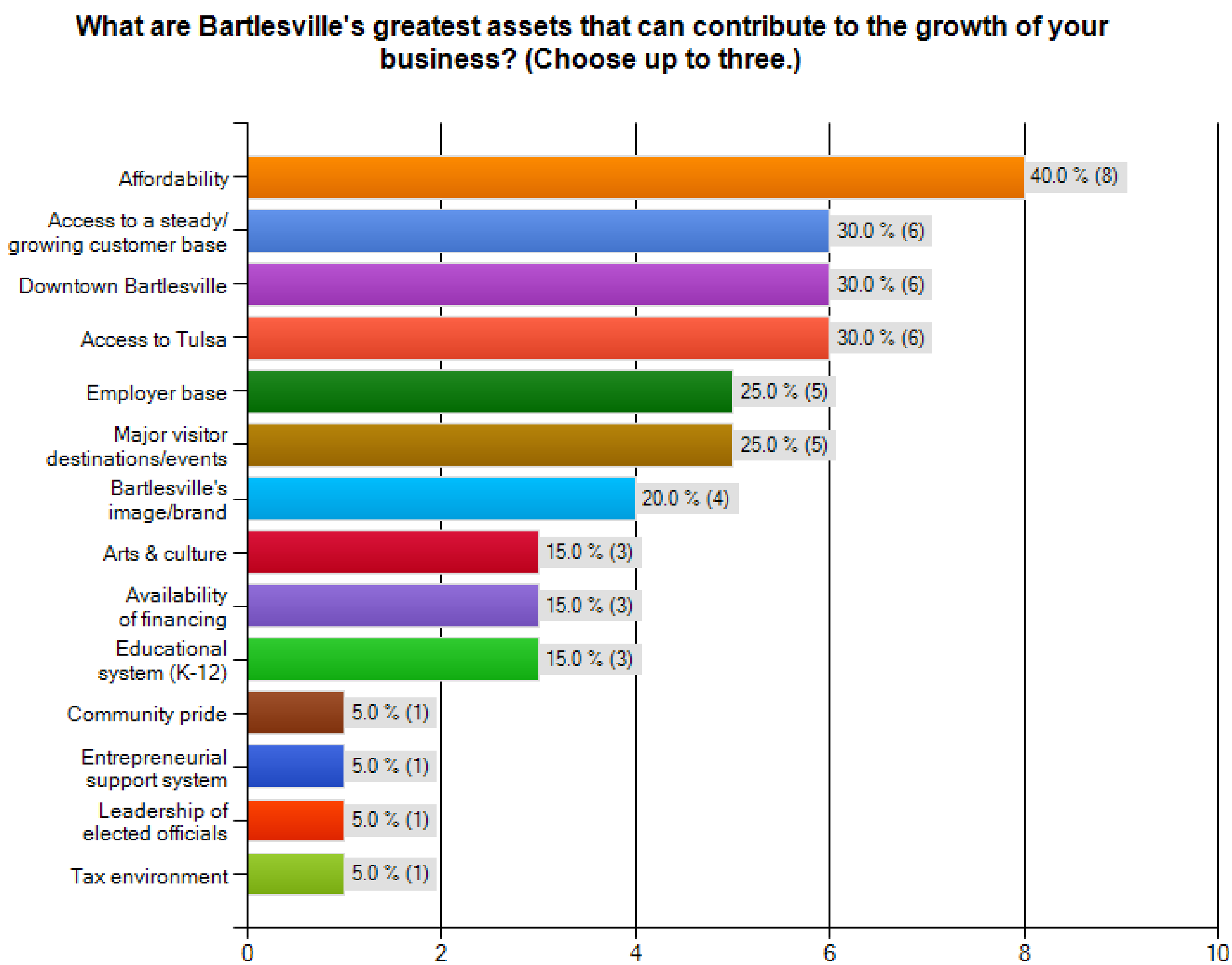
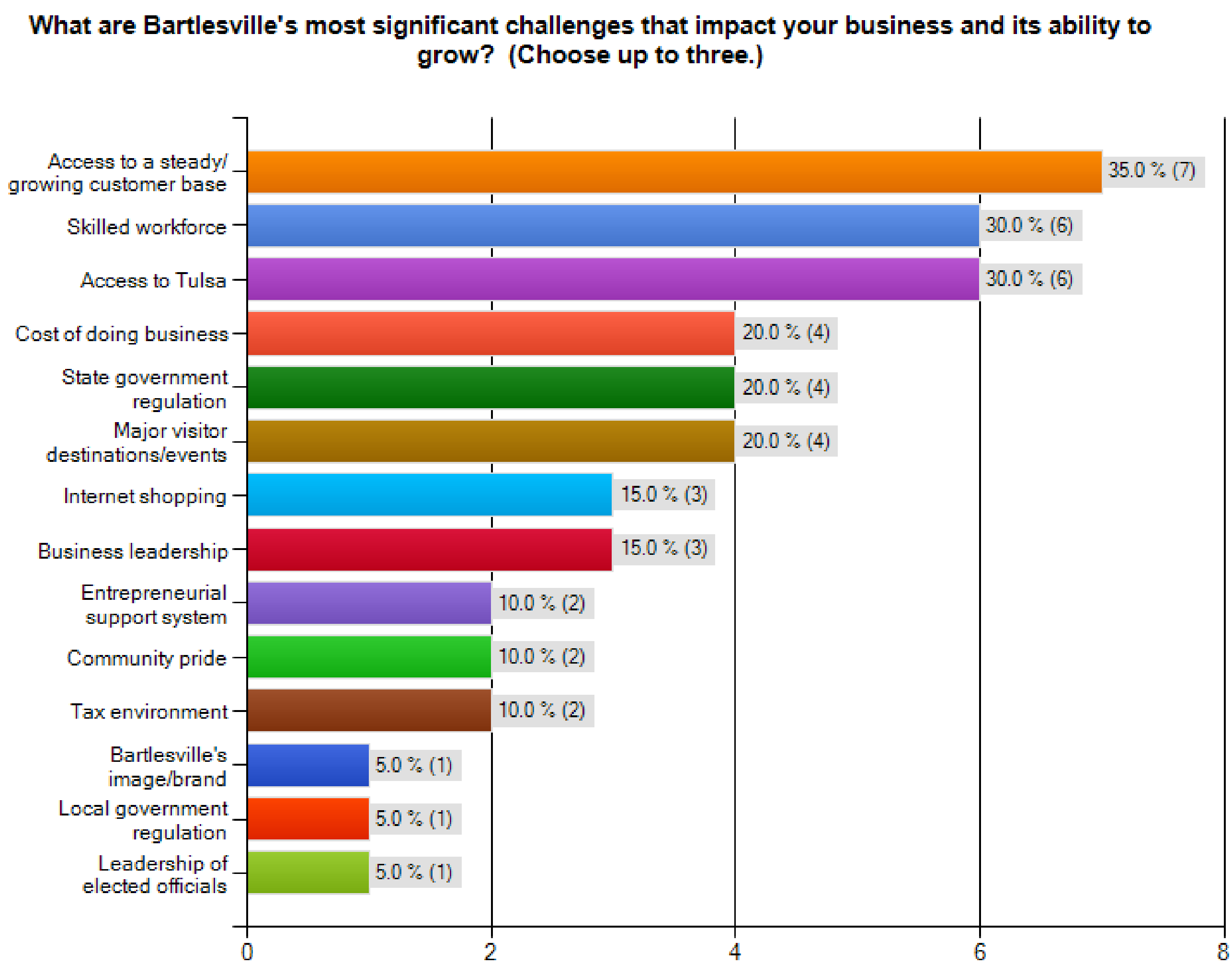
BUSINESS SURVEY



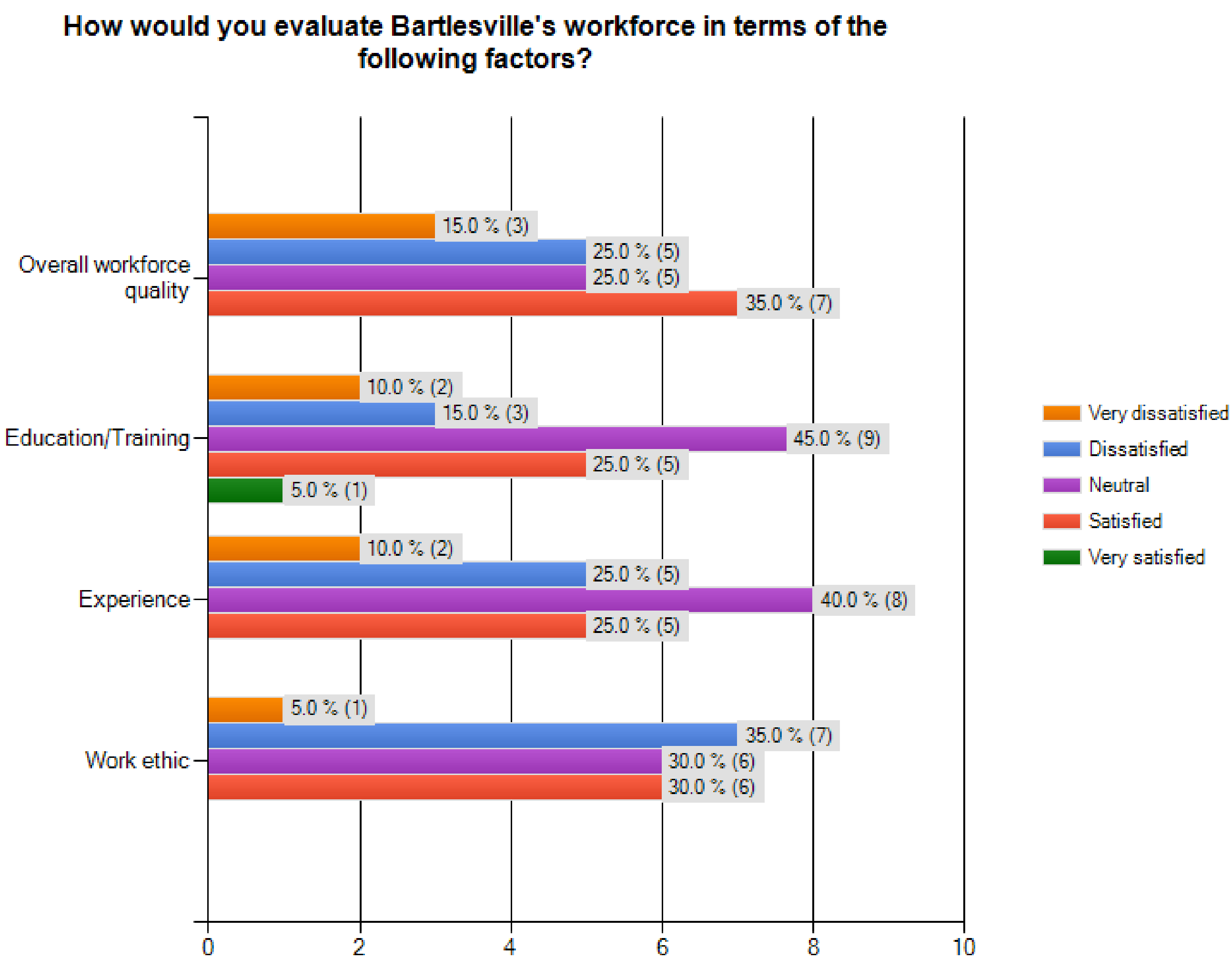
BUSINESS SURVEY



BUSINESS SURVEY



BUSINESS SURVEY



APPENDIX C: ADDITIONAL RETAIL LEAKAGE ANALYSES

ADDITIONAL RETAIL LEAKAGE ANALYSES

In addition to the retail market analysis conducted for Bartlesville and its surrounding trade area, AngelouEconomics performed a retail leakage analysis for multiple geographic areas in Oklahoma and Kansas for comparative purposes including:

- Tulsa MSA
- Tulsa Designated Market Area
- State of Oklahoma
- City of Tulsa, OK
- City of Owasso, OK
- City of Broken Arrow, OK
- City of Ponca City, OK
- City of Stillwater, OK
- City of Enid, OK
- City of Muskogee, OK
- City of Coffeyville, KS
- City of Independence, KS

The tables on the following pages provide the results from the additional retail leakage analyses.

Tulsa MSA Retail Leakage Analysis

Retail Sector	Retail Sales of Tulsa MSA Establishments (Supply-Retail Sales)	Retail Purchases of Tulsa MSA Residents (Demand-Retail Potential)	Retail Leakage	Leakage / Surplus Factor*
Total Retail Sales	$9,606,874,092	$8,676,148,753	$930,725,339	10.7%
Motor Vehicle & Parts Dealers	$2,324,390,368	$1,758,809,162	$565,581,206	32.2%
Automobile Dealers	$2,135,739,852	$1,512,030,616	$623,709,236	41.2%
Other Motor Vehicle Dealers	$76,336,817	$137,932,660	-$61,595,843	-44.7%
Auto Parts, Accessories, and Tire Stores	$112,313,699	$108,845,886	$3,467,813	3.2%
Furniture & Home Furnishings Stores	$314,165,647	$208,412,513	$105,753,134	50.7%
Furniture Stores	$222,050,998	$145,325,375	$76,725,623	52.8%
Home Furnishings Stores	$92,114,649	$63,087,138	$29,027,511	46.0%
Electronics & Appliance Stores	$288,914,206	$242,309,021	$46,605,185	19.2%
Bldg Materials, Garden Equip. & Supply Stores	$400,867,107	$303,284,798	$97,582,309	32.2%
Building Material and Supplies Dealers	$361,510,370	$266,871,144	$94,639,226	35.5%
Lawn and Garden Equipment and Supplies Stores	$39,356,737	$36,413,654	$2,943,083	8.1%
Food & Beverage Stores	$953,543,709	$1,022,442,079	-$68,898,370	-6.7%
Grocery Stores	$882,085,656	$933,410,057	-$51,324,401	-5.5%
Specialty Food Stores	$13,656,464	$17,213,878	-$3,557,414	-20.7%
Beer, Wine, and Liquor Stores	$57,801,589	$71,818,144	-$14,016,555	-19.5%
Health & Personal Care Stores	$375,702,151	$295,455,082	$80,247,069	27.2%
Gasoline Stations	$1,218,715,054	$1,303,196,114	-$84,481,060	-6.5%
Clothing and Clothing Accessories Stores	$287,800,954	$218,132,450	$69,668,504	31.9%
Clothing Stores	$227,925,618	$167,054,190	$60,871,428	36.4%
Shoe Stores	$29,436,392	$21,785,920	$7,650,472	35.1%
Jewelry, Luggage, and Leather Goods Stores	$30,438,944	$29,292,340	$1,146,604	3.9%
Sporting Goods, Hobby, Book, and Music Stores	$150,332,056	$96,977,045	$53,355,011	55.0%
Sporting Goods/Hobby/Musical Instrument Stores	$101,520,500	$60,663,170	$40,857,330	67.4%
Book, Periodical, and Music Stores	$48,811,556	$36,313,875	$12,497,681	34.4%
General Merchandise Stores	$1,774,990,029	$1,641,409,620	$133,580,409	8.1%
Department Stores Excluding Leased Depts.	$734,722,682	$706,513,356	$28,209,326	4.0%
Other General Merchandise Stores	$1,040,267,347	$934,896,264	$105,371,083	11.3%
Miscellaneous Store Retailers	$180,587,705	$166,025,996	$14,561,709	8.8%
Florists	$12,250,346	$8,244,609	$4,005,737	48.6%
Office Supplies, Stationery & Gift Stores	$69,217,128	$55,549,480	$13,667,648	24.6%
Used Merchandise Stores	$10,452,281	$12,408,862	-$1,956,581	-15.8%
Other Miscellaneous Store Retailers	$88,667,950	$89,823,045	-$1,155,095	-1.3%
Nonstore Retailers	$70,566,984	$139,778,692	-$69,211,708	-49.5%
Electronic Shopping & Mail-Order Houses	$8,276,474	$25,136,449	-$16,859,975	-67.1%
Vending Machine Operators	$24,499,883	$28,393,733	-$3,893,850	-13.7%
Direct Selling Establishments	$37,790,627	$86,248,510	-$48,457,883	-56.2%
Food Services & Drinking Places	$1,266,298,122	$1,279,916,181	-$13,618,059	-1.1%
Full-Service Restaurants	$444,237,232	$482,407,164	-$38,169,932	-7.9%
Limited-Service Eating Places	$698,586,823	$684,060,281	$14,526,542	2.1%
Special Food Services	$92,729,259	$75,296,937	$17,432,322	23.2%
Drinking Places - Alcoholic Beverages	$30,744,808	$38,151,799	-$7,406,991	-19.4%

* Leakage factor is defined as the percentage less than the demand being supplied within a given retail category. For example, a leakage of 50% indicates that only half of the demand is currently being supplied. Surplus factor is defined as the percentage greater than the demand being supplied within a given retail category. A surplus of 50% indicates that the supply exceeds the demand by 50%.

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Tulsa Designated Market Area (DMA) Retail Leakage Analysis

Retail Sector	Retail Sales of Tulsa DMA Establishments (Supply-Retail Sales)	Retail Purchases of Tulsa DMA Residents (Demand-Retail Potential)	Retail Leakage	Leakage / Surplus Factor*
Total Retail Sales	$13,085,004,026	$11,829,534,739	$1,255,469,287	10.6%
Motor Vehicle & Parts Dealers	$2,917,817,421	$2,403,725,364	$514,092,057	21.4%
Automobile Dealers	$2,636,094,718	$2,064,818,149	$571,276,569	27.7%
Other Motor Vehicle Dealers	$126,978,572	$194,129,537	-$67,150,965	-34.6%
Auto Parts, Accessories, and Tire Stores	$154,744,131	$144,777,678	$9,966,453	6.9%
Furniture & Home Furnishings Stores	$380,535,950	$272,289,706	$108,246,244	39.8%
Furniture Stores	$265,666,570	$193,815,832	$71,850,738	37.1%
Home Furnishings Stores	$114,869,380	$78,473,874	$36,395,506	46.4%
Electronics & Appliance Stores	$328,304,056	$302,882,437	$25,421,619	8.4%
Bldg Materials, Garden Equip. & Supply Stores	$605,696,284	$416,626,804	$189,069,480	45.4%
Building Material and Supplies Dealers	$536,812,184	$366,471,565	$170,340,619	46.5%
Lawn and Garden Equipment and Supplies Stores	$68,884,100	$50,155,239	$18,728,861	37.3%
Food & Beverage Stores	$1,269,161,801	$1,397,506,136	-$128,344,335	-9.2%
Grocery Stores	$1,175,224,808	$1,283,492,958	-$108,268,150	-8.4%
Specialty Food Stores	$17,877,259	$23,564,176	-$5,686,917	-24.1%
Beer, Wine, and Liquor Stores	$76,059,734	$90,449,002	-$14,389,268	-15.9%
Health & Personal Care Stores	$475,954,616	$394,498,670	$81,455,946	20.6%
Gasoline Stations	$2,054,842,717	$1,890,384,586	$164,458,131	8.7%
Clothing and Clothing Accessories Stores	$332,361,841	$273,091,582	$59,270,259	21.7%
Clothing Stores	$261,284,225	$207,542,715	$53,741,510	25.9%
Shoe Stores	$34,890,076	$28,407,143	$6,482,933	22.8%
Jewelry, Luggage, and Leather Goods Stores	$36,187,540	$37,141,724	-$954,184	-2.6%
Sporting Goods, Hobby, Book, and Music Stores	$173,539,910	$120,011,314	$53,528,596	44.6%
Sporting Goods/Hobby/Musical Instrument Stores	$119,782,504	$75,663,867	$44,118,637	58.3%
Book, Periodical, and Music Stores	$53,757,406	$44,347,447	$9,409,959	21.2%
General Merchandise Stores	$2,473,180,181	$2,223,037,663	$250,142,518	11.3%
Department Stores Excluding Leased Depts.	$1,093,017,314	$1,019,139,082	$73,878,232	7.2%
Other General Merchandise Stores	$1,380,162,867	$1,203,898,581	$176,264,286	14.6%
Miscellaneous Store Retailers	$231,079,088	$220,433,075	$10,646,013	4.8%
Florists	$17,893,460	$12,847,301	$5,046,159	39.3%
Office Supplies, Stationery & Gift Stores	$87,271,996	$74,259,515	$13,012,481	17.5%
Used Merchandise Stores	$14,567,104	$17,582,713	-$3,015,609	-17.2%
Other Miscellaneous Store Retailers	$111,346,528	$115,743,546	-$4,397,018	-3.8%
Nonstore Retailers	$109,712,230	$214,216,498	-$104,504,268	-48.8%
Electronic Shopping & Mail-Order Houses	$24,620,460	$58,872,328	-$34,251,868	-58.2%
Vending Machine Operators	$27,952,126	$36,751,865	-$8,799,739	-23.9%
Direct Selling Establishments	$57,139,644	$118,592,305	-$61,452,661	-51.8%
Food Services & Drinking Places	$1,732,817,931	$1,700,830,904	$31,987,027	1.9%
Full-Service Restaurants	$626,879,935	$663,087,249	-$36,207,314	-5.5%
Limited-Service Eating Places	$966,948,484	$909,408,170	$57,540,314	6.3%
Special Food Services	$99,913,213	$80,989,647	$18,923,566	23.4%
Drinking Places - Alcoholic Beverages	$39,076,299	$47,345,838	-$8,269,539	-17.5%

* Leakage factor is defined as the percentage less than the demand being supplied within a given retail category. For example, a leakage of 50% indicates that only half of the demand is currently being supplied. Surplus factor is defined as the percentage greater than the demand being supplied within a given retail category. A surplus of 50% indicates that the supply exceeds the demand by 50%.

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Oklahoma Retail Leakage Analysis

Retail Sector	Retail Sales of Oklahoma Establishments (Supply-Retail Sales)	Retail Purchases of Oklahoma Residents (Demand-Retail Potential)	Retail Leakage	Leakage / Surplus Factor*
Total Retail Sales	$34,765,512,668	$30,930,161,817	$3,835,350,851	12.4%
Motor Vehicle & Parts Dealers	$8,110,671,155	$6,294,417,794	$1,816,253,361	28.9%
Automobile Dealers	$7,325,298,083	$5,444,688,245	$1,880,609,838	34.5%
Other Motor Vehicle Dealers	$352,215,783	$495,983,984	-$143,768,201	-29.0%
Auto Parts, Accessories, and Tire Stores	$433,157,289	$353,745,565	$79,411,724	22.4%
Furniture & Home Furnishings Stores	$864,666,474	$727,058,650	$137,607,824	18.9%
Furniture Stores	$578,691,554	$500,113,203	$78,578,351	15.7%
Home Furnishings Stores	$285,974,920	$226,945,447	$59,029,473	26.0%
Electronics & Appliance Stores	$798,778,577	$777,313,925	$21,464,652	2.8%
Bldg Materials, Garden Equip. & Supply Stores	$1,352,100,524	$1,071,200,486	$280,900,038	26.2%
Building Material and Supplies Dealers	$1,187,327,747	$948,752,944	$238,574,803	25.1%
Lawn and Garden Equipment and Supplies Stores	$164,772,777	$122,447,542	$42,325,235	34.6%
Food & Beverage Stores	$3,452,389,778	$3,815,326,770	-$362,936,992	-9.5%
Grocery Stores	$3,209,010,045	$3,518,733,304	-$309,723,259	-8.8%
Specialty Food Stores	$49,778,894	$63,963,931	-$14,185,037	-22.2%
Beer, Wine, and Liquor Stores	$193,600,839	$232,629,535	-$39,028,696	-16.8%
Health & Personal Care Stores	$1,214,207,608	$1,021,242,170	$192,965,438	18.9%
Gasoline Stations	$6,273,919,497	$5,173,333,014	$1,100,586,483	21.3%
Clothing and Clothing Accessories Stores	$886,952,883	$797,706,012	$89,246,871	11.2%
Clothing Stores	$703,178,077	$617,410,060	$85,768,017	13.9%
Shoe Stores	$89,079,110	$80,305,315	$8,773,795	10.9%
Jewelry, Luggage, and Leather Goods Stores	$94,695,696	$99,990,637	-$5,294,941	-5.3%
Sporting Goods, Hobby, Book, and Music Stores	$354,623,060	$293,852,317	$60,770,743	20.7%
Sporting Goods/Hobby/Musical Instrument Stores	$212,093,602	$162,620,256	$49,473,346	30.4%
Book, Periodical, and Music Stores	$142,529,458	$131,232,061	$11,297,397	8.6%
General Merchandise Stores	$5,893,576,298	$5,425,596,087	$467,980,211	8.6%
Department Stores Excluding Leased Depts.	$2,744,129,139	$2,562,065,494	$182,063,645	7.1%
Other General Merchandise Stores	$3,149,447,159	$2,863,530,593	$285,916,566	10.0%
Miscellaneous Store Retailers	$676,233,151	$591,033,122	$85,200,029	14.4%
Florists	$60,305,123	$45,363,234	$14,941,889	32.9%
Office Supplies, Stationery & Gift Stores	$250,944,719	$213,853,940	$37,090,779	17.3%
Used Merchandise Stores	$41,233,511	$48,191,678	-$6,958,167	-14.4%
Other Miscellaneous Store Retailers	$323,749,798	$283,624,270	$40,125,528	14.1%
Nonstore Retailers	$304,608,508	$535,619,842	-$231,011,334	-43.1%
Electronic Shopping & Mail-Order Houses	$78,624,166	$175,057,458	-$96,433,292	-55.1%
Vending Machine Operators	$51,018,426	$71,779,122	-$20,760,696	-28.9%
Direct Selling Establishments	$174,965,916	$288,783,262	-$113,817,346	-39.4%
Food Services & Drinking Places	$4,582,785,155	$4,406,461,628	$176,323,527	4.0%
Full-Service Restaurants	$1,694,934,102	$1,753,658,087	-$58,723,985	-3.3%
Limited-Service Eating Places	$2,552,508,358	$2,342,797,465	$209,710,893	9.0%
Special Food Services	$230,195,871	$184,066,508	$46,129,363	25.1%
Drinking Places - Alcoholic Beverages	$105,146,824	$125,939,568	-$20,792,744	-16.5%

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City of Tulsa, OK Retail Leakage Analysis

Retail Sector	Retail Sales of Tulsa Establishments (Supply-Retail Sales)	Retail Purchases of Tulsa Residents (Demand-Retail Potential)	Retail Leakage	Leakage / Surplus Factor*
Total Retail Sales	$5,877,913,983	$3,945,285,541	$1,932,628,442	49.0%
Motor Vehicle & Parts Dealers	$1,518,885,928	$782,680,835	$736,205,093	94.1%
Automobile Dealers	$1,410,094,778	$679,661,400	$730,433,378	107.5%
Other Motor Vehicle Dealers	$42,855,805	$54,021,424	-$11,165,619	-20.7%
Auto Parts, Accessories, and Tire Stores	$65,935,345	$48,998,011	$16,937,334	34.6%
Furniture & Home Furnishings Stores	$258,748,944	$104,798,464	$153,950,480	146.9%
Furniture Stores	$189,820,366	$74,145,441	$115,674,925	156.0%
Home Furnishings Stores	$68,928,578	$30,653,023	$38,275,555	124.9%
Electronics & Appliance Stores	$228,991,939	$118,669,133	$110,322,806	93.0%
Bldg Materials, Garden Equip. & Supply Stores	$241,519,817	$125,901,700	$115,618,117	91.8%
Building Material and Supplies Dealers	$224,723,482	$113,401,040	$111,322,442	98.2%
Lawn and Garden Equipment and Supplies Stores	$16,796,335	$12,500,660	$4,295,675	34.4%
Food & Beverage Stores	$483,729,480	$465,384,868	$18,344,612	3.9%
Grocery Stores	$439,665,968	$420,623,972	$19,041,996	4.5%
Specialty Food Stores	$8,106,203	$7,947,252	$158,951	2.0%
Beer, Wine, and Liquor Stores	$35,957,309	$36,813,644	-$856,335	-2.3%
Health & Personal Care Stores	$240,965,548	$136,549,212	$104,416,336	76.5%
Gasoline Stations	$552,580,522	$550,051,793	$2,528,729	0.5%
Clothing and Clothing Accessories Stores	$250,784,005	$125,246,262	$125,537,743	100.2%
Clothing Stores	$199,610,111	$96,482,670	$103,127,441	106.9%
Shoe Stores	$24,084,300	$12,004,208	$12,080,092	100.6%
Jewelry, Luggage, and Leather Goods Stores	$27,089,594	$16,759,384	$10,330,210	61.6%
Sporting Goods, Hobby, Book, and Music Stores	$129,887,345	$53,418,324	$76,469,021	143.2%
Sporting Goods/Hobby/Musical Instrument Stores	$84,386,157	$34,277,425	$50,108,732	146.2%
Book, Periodical, and Music Stores	$45,501,188	$19,140,899	$26,360,289	137.7%
General Merchandise Stores	$1,033,027,119	$743,600,196	$289,426,923	38.9%
Department Stores Excluding Leased Depts.	$326,589,643	$274,946,389	$51,643,254	18.8%
Other General Merchandise Stores	$706,437,476	$468,653,807	$237,783,669	50.7%
Miscellaneous Store Retailers	$127,526,378	$81,904,842	$45,621,536	55.7%
Florists	$6,275,734	$2,882,437	$3,393,297	117.7%
Office Supplies, Stationery & Gift Stores	$50,120,710	$26,755,778	$23,364,932	87.3%
Used Merchandise Stores	$6,827,223	$4,168,118	$2,659,105	63.8%
Other Miscellaneous Store Retailers	$64,302,711	$48,098,509	$16,204,202	33.7%
Nonstore Retailers	$55,855,366	$61,190,822	-$5,335,456	-8.7%
Electronic Shopping & Mail-Order Houses	$6,008,443	$6,988,892	-$980,449	-14.0%
Vending Machine Operators	$22,768,071	$17,182,394	$5,585,677	32.5%
Direct Selling Establishments	$27,078,852	$37,019,536	-$9,940,684	-26.9%
Food Services & Drinking Places	$755,411,592	$595,889,090	$159,522,502	26.8%
Full-Service Restaurants	$263,048,262	$216,362,838	$46,685,424	21.6%
Limited-Service Eating Places	$396,172,159	$316,935,207	$79,236,952	25.0%
Special Food Services	$73,956,783	$42,891,793	$31,064,990	72.4%
Drinking Places - Alcoholic Beverages	$22,234,388	$19,699,252	$2,535,136	12.9%

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City of Owasso, OK Retail Leakage Analysis

Retail Sector	Retail Sales of Owasso Establishments (Supply-Retail Sales)	Retail Purchases of Owasso Residents (Demand-Retail Potential)	Retail Leakage	Leakage / Surplus Factor*
Total Retail Sales	$343,881,671	$264,045,110	$79,836,561	30.2%
Motor Vehicle & Parts Dealers	$26,572,415	$54,400,889	-$27,828,474	-51.2%
Automobile Dealers	$22,854,915	$47,108,355	-$24,253,440	-51.5%
Other Motor Vehicle Dealers	$185,800	$4,028,435	-$3,842,635	-95.4%
Auto Parts, Accessories, and Tire Stores	$3,531,700	$3,264,099	$267,601	8.2%
Furniture & Home Furnishings Stores	$5,520,360	$7,437,829	-$1,917,469	-25.8%
Furniture Stores	$4,870,432	$5,249,570	-$379,138	-7.2%
Home Furnishings Stores	$649,928	$2,188,259	-$1,538,331	-70.3%
Electronics & Appliance Stores	$8,688,594	$8,234,945	$453,649	5.5%
Bldg Materials, Garden Equip. & Supply Stores	$31,918,322	$9,392,556	$22,525,766	239.8%
Building Material and Supplies Dealers	$31,918,322	$8,489,659	$23,428,663	276.0%
Lawn and Garden Equipment and Supplies Stores	$0	$902,897	-$902,897	-100.0%
Food & Beverage Stores	$57,209,318	$30,170,798	$27,038,520	89.6%
Grocery Stores	$55,621,717	$27,226,342	$28,395,375	104.3%
Specialty Food Stores	$193,518	$513,236	-$319,718	-62.3%
Beer, Wine, and Liquor Stores	$1,394,083	$2,431,220	-$1,037,137	-42.7%
Health & Personal Care Stores	$11,921,268	$8,818,893	$3,102,375	35.2%
Gasoline Stations	$32,888,342	$35,811,796	-$2,923,454	-8.2%
Clothing and Clothing Accessories Stores	$10,914,350	$8,358,444	$2,555,906	30.6%
Clothing Stores	$9,096,810	$6,419,665	$2,677,145	41.7%
Shoe Stores	$1,623,250	$784,088	$839,162	107.0%
Jewelry, Luggage, and Leather Goods Stores	$194,290	$1,154,691	-$960,401	-83.2%
Sporting Goods, Hobby, Book, and Music Stores	$2,197,660	$3,632,358	-$1,434,698	-39.5%
Sporting Goods/Hobby/Musical Instrument Stores	$2,146,446	$2,377,474	-$231,028	-9.7%
Book, Periodical, and Music Stores	$51,214	$1,254,884	-$1,203,670	-95.9%
General Merchandise Stores	$83,285,448	$49,290,003	$33,995,445	69.0%
Department Stores Excluding Leased Depts.	$49,834,868	$18,558,365	$31,276,503	168.5%
Other General Merchandise Stores	$33,450,580	$30,731,638	$2,718,942	8.8%
Miscellaneous Store Retailers	$6,153,930	$5,201,782	$952,148	18.3%
Florists	$828,183	$208,734	$619,449	296.8%
Office Supplies, Stationery & Gift Stores	$1,745,417	$1,815,735	-$70,318	-3.9%
Used Merchandise Stores	$108,767	$286,903	-$178,136	-62.1%
Other Miscellaneous Store Retailers	$3,471,563	$2,890,410	$581,153	20.1%
Nonstore Retailers	$0	$3,654,060	-$3,654,060	-100.0%
Electronic Shopping & Mail-Order Houses	$0	$466,452	-$466,452	-100.0%
Vending Machine Operators	$0	$1,117,068	-$1,117,068	-100.0%
Direct Selling Establishments	$0	$2,070,540	-$2,070,540	-100.0%
Food Services & Drinking Places	$66,611,664	$39,640,757	$26,970,907	68.0%
Full-Service Restaurants	$18,865,355	$14,404,602	$4,460,753	31.0%
Limited-Service Eating Places	$46,939,928	$21,158,238	$25,781,690	121.9%
Special Food Services	$0	$2,866,291	-$2,866,291	-100.0%
Drinking Places - Alcoholic Beverages	$806,381	$1,211,626	-$405,245	-33.4%

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City of Broken Arrow, OK Retail Leakage Analysis

Retail Sector	Retail Sales of Broken Arrow Establishments (Supply-Retail Sales)	Retail Purchases of Broken Arrow Residents (Demand-Retail Potential)	Retail Leakage	Leakage / Surplus Factor*
Total Retail Sales	$835,308,585	$910,964,903	-$75,656,318	-8.3%
Motor Vehicle & Parts Dealers	$213,621,228	$186,773,618	$26,847,610	14.4%
Automobile Dealers	$201,815,295	$161,625,113	$40,190,182	24.9%
Other Motor Vehicle Dealers	$4,108,825	$13,810,391	-$9,701,566	-70.2%
Auto Parts, Accessories, and Tire Stores	$7,697,108	$11,338,114	-$3,641,006	-32.1%
Furniture & Home Furnishings Stores	$9,684,601	$25,858,921	-$16,174,320	-62.5%
Furniture Stores	$3,958,830	$18,241,061	-$14,282,231	-78.3%
Home Furnishings Stores	$5,725,771	$7,617,860	-$1,892,089	-24.8%
Electronics & Appliance Stores	$17,078,288	$28,274,026	-$11,195,738	-39.6%
Bldg Materials, Garden Equip. & Supply Stores	$37,814,192	$32,603,447	$5,210,745	16.0%
Building Material and Supplies Dealers	$30,203,144	$29,427,233	$775,911	2.6%
Lawn and Garden Equipment and Supplies Stores	$7,611,048	$3,176,214	$4,434,834	139.6%
Food & Beverage Stores	$94,105,717	$104,024,031	-$9,918,314	-9.5%
Grocery Stores	$87,598,521	$93,866,317	-$6,267,796	-6.7%
Specialty Food Stores	$594,344	$1,768,444	-$1,174,100	-66.4%
Beer, Wine, and Liquor Stores	$5,912,852	$8,389,270	-$2,476,418	-29.5%
Health & Personal Care Stores	$39,374,432	$30,677,911	$8,696,521	28.3%
Gasoline Stations	$111,153,304	$123,451,367	-$12,298,063	-10.0%
Clothing and Clothing Accessories Stores	$7,192,119	$28,909,307	-$21,717,188	-75.1%
Clothing Stores	$4,513,728	$22,205,757	-$17,692,029	-79.7%
Shoe Stores	$1,207,376	$2,694,382	-$1,487,006	-55.2%
Jewelry, Luggage, and Leather Goods Stores	$1,471,015	$4,009,168	-$2,538,153	-63.3%
Sporting Goods, Hobby, Book, and Music Stores	$8,391,579	$12,469,102	-$4,077,523	-32.7%
Sporting Goods/Hobby/Musical Instrument Stores	$7,652,968	$8,162,627	-$509,659	-6.2%
Book, Periodical, and Music Stores	$738,611	$4,306,475	-$3,567,864	-82.8%
General Merchandise Stores	$158,586,097	$170,230,767	-$11,644,670	-6.8%
Department Stores Excluding Leased Depts.	$96,076,262	$64,122,412	$31,953,850	49.8%
Other General Merchandise Stores	$62,509,835	$106,108,355	-$43,598,520	-41.1%
Miscellaneous Store Retailers	$15,042,050	$17,944,238	-$2,902,188	-16.2%
Florists	$919,817	$734,913	$184,904	25.2%
Office Supplies, Stationery & Gift Stores	$4,925,494	$6,312,795	-$1,387,301	-22.0%
Used Merchandise Stores	$1,202,429	$992,554	$209,875	21.1%
Other Miscellaneous Store Retailers	$7,994,310	$9,903,976	-$1,909,666	-19.3%
Nonstore Retailers	$2,233,151	$12,957,214	-$10,724,063	-82.8%
Electronic Shopping & Mail-Order Houses	$0	$1,617,675	-$1,617,675	-100.0%
Vending Machine Operators	$611,843	$3,849,939	-$3,238,096	-84.1%
Direct Selling Establishments	$1,621,308	$7,489,600	-$5,868,292	-78.4%
Food Services & Drinking Places	$121,031,827	$136,790,954	-$15,759,127	-11.5%
Full-Service Restaurants	$41,548,003	$49,761,852	-$8,213,849	-16.5%
Limited-Service Eating Places	$78,316,743	$73,012,606	$5,304,137	7.3%
Special Food Services	$95,671	$9,892,463	-$9,796,792	-99.0%
Drinking Places - Alcoholic Beverages	$1,071,410	$4,124,033	-$3,052,623	-74.0%

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City of Ponca City, OK Retail Leakage Analysis

Retail Sector	Retail Sales of Ponca City Establishments (Supply-Retail Sales)	Retail Purchases of Ponca City Residents (Demand-Retail Potential)	Retail Leakage	Leakage / Surplus Factor*
Total Retail Sales	$280,105,176	$203,340,441	$76,764,735	37.8%
Motor Vehicle & Parts Dealers	$71,342,640	$40,350,500	$30,992,140	76.8%
Automobile Dealers	$67,223,433	$35,357,079	$31,866,354	90.1%
Other Motor Vehicle Dealers	$534,754	$2,536,919	-$2,002,165	-78.9%
Auto Parts, Accessories, and Tire Stores	$3,584,453	$2,456,502	$1,127,951	45.9%
Furniture & Home Furnishings Stores	$6,199,653	$4,615,060	$1,584,593	34.3%
Furniture Stores	$4,046,018	$3,327,579	$718,439	21.6%
Home Furnishings Stores	$2,153,635	$1,287,481	$866,154	67.3%
Electronics & Appliance Stores	$4,662,216	$4,610,118	$52,098	1.1%
Bldg Materials, Garden Equip. & Supply Stores	$22,175,728	$6,840,306	$15,335,422	224.2%
Building Material and Supplies Dealers	$21,367,125	$6,321,448	$15,045,677	238.0%
Lawn and Garden Equipment and Supplies Stores	$808,603	$518,858	$289,745	55.8%
Food & Beverage Stores	$19,209,952	$25,350,122	-$6,140,170	-24.2%
Grocery Stores	$16,420,403	$22,725,749	-$6,305,346	-27.7%
Specialty Food Stores	$1,419,914	$1,447,916	-$28,002	-1.9%
Beer, Wine, and Liquor Stores	$1,369,635	$1,176,457	$193,178	16.4%
Health & Personal Care Stores	$7,656,840	$6,299,952	$1,356,888	21.5%
Gasoline Stations	$42,808,645	$40,916,521	$1,892,124	4.6%
Clothing and Clothing Accessories Stores	$4,553,894	$4,104,665	$449,229	10.9%
Clothing Stores	$3,143,114	$2,818,240	$324,874	11.5%
Shoe Stores	$693,435	$609,378	$84,057	13.8%
Jewelry, Luggage, and Leather Goods Stores	$717,345	$677,047	$40,298	6.0%
Sporting Goods, Hobby, Book, and Music Stores	$2,599,176	$2,448,048	$151,128	6.2%
Sporting Goods/Hobby/Musical Instrument Stores	$1,168,672	$1,113,431	$55,241	5.0%
Book, Periodical, and Music Stores	$1,430,504	$1,334,617	$95,887	7.2%
General Merchandise Stores	$54,478,682	$32,990,261	$21,488,421	65.1%
Department Stores Excluding Leased Depts.	$38,779,019	$21,930,482	$16,848,537	76.8%
Other General Merchandise Stores	$15,699,663	$11,059,779	$4,639,884	42.0%
Miscellaneous Store Retailers	$5,016,324	$4,101,088	$915,236	22.3%
Florists	$287,473	$346,462	-$58,989	-17.0%
Office Supplies, Stationery & Gift Stores	$3,131,965	$1,876,056	$1,255,909	66.9%
Used Merchandise Stores	$345,968	$396,403	-$50,435	-12.7%
Other Miscellaneous Store Retailers	$1,250,918	$1,482,167	-$231,249	-15.6%
Nonstore Retailers	$585,856	$1,998,498	-$1,412,642	-70.7%
Electronic Shopping & Mail-Order Houses	$0	$906,025	-$906,025	-100.0%
Vending Machine Operators	$585,856	$544,839	$41,017	7.5%
Direct Selling Establishments	$0	$547,634	-$547,634	-100.0%
Food Services & Drinking Places	$38,815,570	$28,715,302	$10,100,268	35.2%
Full-Service Restaurants	$9,566,765	$9,012,549	$554,216	6.1%
Limited-Service Eating Places	$28,120,297	$18,425,626	$9,694,671	52.6%
Special Food Services	$204,575	$134,142	$70,433	52.5%
Drinking Places - Alcoholic Beverages	$923,933	$1,142,985	-$219,052	-19.2%

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City of Stillwater, OK Retail Leakage Analysis

Retail Sector	Retail Sales of Stillwater Establishments (Supply-Retail Sales)	Retail Purchases of Stillwater Residents (Demand-Retail Potential)	Retail Leakage	Leakage / Surplus Factor*
Total Retail Sales	$467,129,174	$337,651,931	$129,477,243	38.3%
Motor Vehicle & Parts Dealers	$58,614,951	$65,845,430	-$7,230,479	-11.0%
Automobile Dealers	$52,830,040	$57,635,656	-$4,805,616	-8.3%
Other Motor Vehicle Dealers	$1,308,002	$4,531,079	-$3,223,077	-71.1%
Auto Parts, Accessories, and Tire Stores	$4,476,909	$3,678,695	$798,214	21.7%
Furniture & Home Furnishings Stores	$12,474,179	$7,841,388	$4,632,791	59.1%
Furniture Stores	$7,697,278	$5,766,623	$1,930,655	33.5%
Home Furnishings Stores	$4,776,901	$2,074,765	$2,702,136	130.2%
Electronics & Appliance Stores	$7,838,258	$7,265,338	$572,920	7.9%
Bldg Materials, Garden Equip. & Supply Stores	$11,120,456	$8,922,203	$2,198,253	24.6%
Building Material and Supplies Dealers	$10,766,837	$8,698,612	$2,068,225	23.8%
Lawn and Garden Equipment and Supplies Stores	$353,619	$223,591	$130,028	58.2%
Food & Beverage Stores	$32,274,966	$40,857,012	-$8,582,046	-21.0%
Grocery Stores	$27,762,556	$36,819,908	-$9,057,352	-24.6%
Specialty Food Stores	$455,737	$721,401	-$265,664	-36.8%
Beer, Wine, and Liquor Stores	$4,056,673	$3,315,703	$740,970	22.3%
Health & Personal Care Stores	$12,094,711	$8,146,352	$3,948,359	48.5%
Gasoline Stations	$63,411,406	$59,309,212	$4,102,194	6.9%
Clothing and Clothing Accessories Stores	$16,955,808	$9,708,584	$7,247,224	74.6%
Clothing Stores	$13,848,540	$7,425,843	$6,422,697	86.5%
Shoe Stores	$2,035,359	$1,166,860	$868,499	74.4%
Jewelry, Luggage, and Leather Goods Stores	$1,071,909	$1,115,881	-$43,972	-3.9%
Sporting Goods, Hobby, Book, and Music Stores	$41,224,952	$7,894,961	$33,329,991	422.2%
Sporting Goods/Hobby/Musical Instrument Stores	$1,840,037	$1,518,160	$321,877	21.2%
Book, Periodical, and Music Stores	$39,384,915	$6,376,801	$33,008,114	517.6%
General Merchandise Stores	$84,508,178	$58,671,749	$25,836,429	44.0%
Department Stores Excluding Leased Depts.	$62,069,172	$40,629,927	$21,439,245	52.8%
Other General Merchandise Stores	$22,439,006	$18,041,822	$4,397,184	24.4%
Miscellaneous Store Retailers	$7,465,517	$6,034,040	$1,431,477	23.7%
Florists	$630,338	$464,340	$165,998	35.7%
Office Supplies, Stationery & Gift Stores	$4,550,015	$2,942,246	$1,607,769	54.6%
Used Merchandise Stores	$383,909	$364,147	$19,762	5.4%
Other Miscellaneous Store Retailers	$1,901,255	$2,263,307	-$362,052	-16.0%
Nonstore Retailers	$4,527,129	$3,524,958	$1,002,171	28.4%
Electronic Shopping & Mail-Order Houses	$1,706,197	$781,638	$924,559	118.3%
Vending Machine Operators	$136,786	$145,902	-$9,116	-6.2%
Direct Selling Establishments	$2,684,146	$2,597,418	$86,728	3.3%
Food Services & Drinking Places	$114,618,663	$53,630,704	$60,987,959	113.7%
Full-Service Restaurants	$43,525,245	$19,399,007	$24,126,238	124.4%
Limited-Service Eating Places	$62,426,187	$25,724,665	$36,701,522	142.7%
Special Food Services	$5,897,426	$6,545,520	-$648,094	-9.9%
Drinking Places - Alcoholic Beverages	$2,769,805	$1,961,512	$808,293	41.2%

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City of Enid, OK Retail Leakage Analysis

Retail Sector	Retail Sales of Enid Establishments (Supply-Retail Sales)	Retail Purchases of Enid Residents (Demand-Retail Potential)	Retail Leakage	Leakage / Surplus Factor*
Total Retail Sales	$466,985,212	$387,624,604	**$79,360,608**	**20.5%**
Motor Vehicle & Parts Dealers	$110,954,776	$78,277,002	**$32,677,774**	**41.7%**
Automobile Dealers	$99,326,559	$67,057,803	**$32,268,756**	**48.1%**
Other Motor Vehicle Dealers	$4,926,160	$6,341,641	**-$1,415,481**	**-22.3%**
Auto Parts, Accessories, and Tire Stores	$6,702,057	$4,877,558	**$1,824,499**	**37.4%**
Furniture & Home Furnishings Stores	$7,429,267	$7,986,962	**-$557,695**	**-7.0%**
Furniture Stores	$4,123,110	$5,360,891	**-$1,237,781**	**-23.1%**
Home Furnishings Stores	$3,306,157	$2,626,071	**$680,086**	**25.9%**
Electronics & Appliance Stores	$4,560,401	$7,488,206	**-$2,927,805**	**-39.1%**
Bldg Materials, Garden Equip. & Supply Stores	$15,951,573	$12,913,997	**$3,037,576**	**23.5%**
Building Material and Supplies Dealers	$14,655,173	$12,038,272	**$2,616,901**	**21.7%**
Lawn and Garden Equipment and Supplies Stores	$1,296,400	$875,725	**$420,675**	**48.0%**
Food & Beverage Stores	$65,841,378	$65,592,671	**$248,707**	**0.4%**
Grocery Stores	$61,575,715	$61,853,324	**-$277,609**	**-0.4%**
Specialty Food Stores	$519,220	$617,930	**-$98,710**	**-16.0%**
Beer, Wine, and Liquor Stores	$3,746,443	$3,121,417	**$625,026**	**20.0%**
Health & Personal Care Stores	$17,154,843	$12,300,824	**$4,854,019**	**39.5%**
Gasoline Stations	$75,196,355	$66,929,237	**$8,267,118**	**12.4%**
Clothing and Clothing Accessories Stores	$11,195,677	$9,897,880	**$1,297,797**	**13.1%**
Clothing Stores	$8,493,051	$7,198,276	**$1,294,775**	**18.0%**
Shoe Stores	$1,638,384	$1,394,564	**$243,820**	**17.5%**
Jewelry, Luggage, and Leather Goods Stores	$1,064,242	$1,305,040	**-$240,798**	**-18.5%**
Sporting Goods, Hobby, Book, and Music Stores	$2,782,700	$3,570,783	**-$788,083**	**-22.1%**
Sporting Goods/Hobby/Musical Instrument Stores	$1,987,602	$1,975,404	**$12,198**	**0.6%**
Book, Periodical, and Music Stores	$795,098	$1,595,379	**-$800,281**	**-50.2%**
General Merchandise Stores	$69,397,990	$56,720,910	**$12,677,080**	**22.3%**
Department Stores Excluding Leased Depts.	$40,561,640	$40,659,230	**-$97,590**	**-0.2%**
Other General Merchandise Stores	$28,836,350	$16,061,680	**$12,774,670**	**79.5%**
Miscellaneous Store Retailers	$11,078,738	$9,067,614	**$2,011,124**	**22.2%**
Florists	$3,792,342	$1,889,362	**$1,902,980**	**100.7%**
Office Supplies, Stationery & Gift Stores	$2,619,274	$2,775,660	**-$156,386**	**-5.6%**
Used Merchandise Stores	$1,208,196	$1,533,621	**-$325,425**	**-21.2%**
Other Miscellaneous Store Retailers	$3,458,926	$2,868,971	**$589,955**	**20.6%**
Nonstore Retailers	$1,526,175	$1,555,488	**-$29,313**	**-1.9%**
Electronic Shopping & Mail-Order Houses	$874,159	$667,305	**$206,854**	**31.0%**
Vending Machine Operators	$568,902	$607,118	**-$38,216**	**-6.3%**
Direct Selling Establishments	$83,114	$281,065	**-$197,951**	**-70.4%**
Food Services & Drinking Places	$73,915,339	$55,323,030	**$18,592,309**	**33.6%**
Full-Service Restaurants	$18,753,709	$15,883,379	**$2,870,330**	**18.1%**
Limited-Service Eating Places	$48,826,249	$34,226,469	**$14,599,780**	**42.7%**
Special Food Services	$3,669,541	$2,685,061	**$984,480**	**36.7%**
Drinking Places - Alcoholic Beverages	$2,665,840	$2,528,121	**$137,719**	**5.4%**

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City of Muskogee, OK Retail Leakage Analysis

Retail Sector	Retail Sales of Muskogee Establishments (Supply-Retail Sales)	Retail Purchases of Muskogee Residents (Demand-Retail Potential)	Retail Leakage	Leakage / Surplus Factor*
Total Retail Sales	$515,118,820	$277,990,895	$237,127,925	85.3%
Motor Vehicle & Parts Dealers	$93,666,251	$54,079,255	$39,586,996	73.2%
Automobile Dealers	$86,664,335	$47,184,561	$39,479,774	83.7%
Other Motor Vehicle Dealers	$2,319,705	$3,897,832	-$1,578,127	-40.5%
Auto Parts, Accessories, and Tire Stores	$4,682,211	$2,996,862	$1,685,349	56.2%
Furniture & Home Furnishings Stores	$15,263,774	$6,558,661	$8,705,113	132.7%
Furniture Stores	$14,201,564	$5,790,351	$8,411,213	145.3%
Home Furnishings Stores	$1,062,210	$768,310	$293,900	38.3%
Electronics & Appliance Stores	$6,675,591	$6,324,367	$351,224	5.6%
Bldg Materials, Garden Equip. & Supply Stores	$84,417,498	$11,074,405	$73,343,093	662.3%
Building Material and Supplies Dealers	$83,237,237	$10,209,530	$73,027,707	715.3%
Lawn and Garden Equipment and Supplies Stores	$1,180,261	$864,875	$315,386	36.5%
Food & Beverage Stores	$30,365,982	$28,262,387	$2,103,595	7.4%
Grocery Stores	$28,161,807	$26,305,477	$1,856,330	7.1%
Specialty Food Stores	$618,394	$584,550	$33,844	5.8%
Beer, Wine, and Liquor Stores	$1,585,781	$1,372,360	$213,421	15.6%
Health & Personal Care Stores	$17,070,501	$8,766,952	$8,303,549	94.7%
Gasoline Stations	$73,045,851	$51,307,807	$21,738,044	42.4%
Clothing and Clothing Accessories Stores	$13,771,448	$8,215,335	$5,556,113	67.6%
Clothing Stores	$11,542,644	$6,705,557	$4,837,087	72.1%
Shoe Stores	$1,153,639	$610,656	$542,983	88.9%
Jewelry, Luggage, and Leather Goods Stores	$1,075,165	$899,122	$176,043	19.6%
Sporting Goods, Hobby, Book, and Music Stores	$2,580,353	$5,013,637	-$2,433,284	-48.5%
Sporting Goods/Hobby/Musical Instrument Stores	$1,532,122	$3,875,265	-$2,343,143	-60.5%
Book, Periodical, and Music Stores	$1,048,231	$1,138,372	-$90,141	-7.9%
General Merchandise Stores	$89,102,992	$49,517,008	$39,585,984	79.9%
Department Stores Excluding Leased Depts.	$46,736,352	$20,215,533	$26,520,819	131.2%
Other General Merchandise Stores	$42,366,640	$29,301,475	$13,065,165	44.6%
Miscellaneous Store Retailers	$7,928,600	$5,527,212	$2,401,388	43.4%
Florists	$402,270	$101,508	$300,762	296.3%
Office Supplies, Stationery & Gift Stores	$2,852,016	$2,210,539	$641,477	29.0%
Used Merchandise Stores	$578,074	$369,845	$208,229	56.3%
Other Miscellaneous Store Retailers	$4,096,240	$2,845,320	$1,250,920	44.0%
Nonstore Retailers	$1,886,643	$2,791,048	-$904,405	-32.4%
Electronic Shopping & Mail-Order Houses	$244,483	$110,948	$133,535	120.4%
Vending Machine Operators	$1,028,286	$804,598	$223,688	27.8%
Direct Selling Establishments	$613,874	$1,875,502	-$1,261,628	-67.3%
Food Services & Drinking Places	$79,343,336	$40,552,821	$38,790,515	95.7%
Full-Service Restaurants	$26,711,569	$15,086,645	$11,624,924	77.1%
Limited-Service Eating Places	$50,793,963	$23,823,873	$26,970,090	113.2%
Special Food Services	$1,032,968	$774,731	$258,237	33.3%
Drinking Places - Alcoholic Beverages	$804,836	$867,572	-$62,736	-7.2%

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City of Coffeyville, KS Retail Leakage Analysis				
Retail Sector	Retail Sales of Coffeyville Establishments (Supply-Retail Sales)	Retail Purchases of Coffeyville Residents (Demand-Retail Potential)	Retail Leakage	Leakage / Surplus Factor*
Total Retail Sales	$112,908,210	$70,843,583	$42,064,627	59.4%
Motor Vehicle & Parts Dealers	$10,347,748	$14,273,003	-$3,925,255	-27.5%
Automobile Dealers	$6,406,790	$12,005,790	-$5,599,000	-46.6%
Other Motor Vehicle Dealers	$67,687	$1,078,335	-$1,010,648	-93.7%
Auto Parts, Accessories, and Tire Stores	$3,873,271	$1,188,878	$2,684,393	225.8%
Furniture & Home Furnishings Stores	$1,838,011	$1,178,196	$659,815	56.0%
Furniture Stores	$1,686,798	$989,739	$697,059	70.4%
Home Furnishings Stores	$151,213	$188,457	-$37,244	-19.8%
Electronics & Appliance Stores	$186,402	$693,417	-$507,015	-73.1%
Bldg Materials, Garden Equip. & Supply Stores	$1,351,470	$2,230,897	-$879,427	-39.4%
Building Material and Supplies Dealers	$1,314,331	$1,931,293	-$616,962	-31.9%
Lawn and Garden Equipment and Supplies Stores	$37,139	$299,604	-$262,465	-87.6%
Food & Beverage Stores	$17,194,450	$9,789,815	$7,404,635	75.6%
Grocery Stores	$15,797,294	$8,928,309	$6,868,985	76.9%
Specialty Food Stores	$0	$80,735	-$80,735	-100.0%
Beer, Wine, and Liquor Stores	$1,397,156	$780,771	$616,385	78.9%
Health & Personal Care Stores	$3,298,596	$1,729,486	$1,569,110	90.7%
Gasoline Stations	$11,689,811	$11,374,592	$315,219	2.8%
Clothing and Clothing Accessories Stores	$762,968	$679,827	$83,141	12.2%
Clothing Stores	$372,960	$457,813	-$84,853	-18.5%
Shoe Stores	$166,206	$132,991	$33,215	25.0%
Jewelry, Luggage, and Leather Goods Stores	$223,802	$89,023	$134,779	151.4%
Sporting Goods, Hobby, Book, and Music Stores	$65,949	$94,171	-$28,222	-30.0%
Sporting Goods/Hobby/Musical Instrument Stores	$65,949	$33,530	$32,419	96.7%
Book, Periodical, and Music Stores	$0	$60,641	-$60,641	-100.0%
General Merchandise Stores	$41,798,459	$14,475,280	$27,323,179	188.8%
Department Stores Excluding Leased Depts.	$26,272,024	$7,833,889	$18,438,135	235.4%
Other General Merchandise Stores	$15,526,435	$6,641,391	$8,885,044	133.8%
Miscellaneous Store Retailers	$1,147,756	$818,531	$329,225	40.2%
Florists	$163,744	$110,058	$53,686	48.8%
Office Supplies, Stationery & Gift Stores	$805,568	$301,717	$503,851	167.0%
Used Merchandise Stores	$73,044	$54,381	$18,663	34.3%
Other Miscellaneous Store Retailers	$105,400	$352,375	-$246,975	-70.1%
Nonstore Retailers	$1,423,616	$3,881,296	-$2,457,680	-63.3%
Electronic Shopping & Mail-Order Houses	$0	$2,933,755	-$2,933,755	-100.0%
Vending Machine Operators	$0	$150,600	-$150,600	-100.0%
Direct Selling Establishments	$1,423,616	$796,941	$626,675	78.6%
Food Services & Drinking Places	$21,802,974	$9,625,072	$12,177,902	126.5%
Full-Service Restaurants	$5,791,815	$3,898,347	$1,893,468	48.6%
Limited-Service Eating Places	$15,573,683	$5,383,403	$10,190,280	189.3%
Special Food Services	$0	$9,024	-$9,024	-100.0%
Drinking Places - Alcoholic Beverages	$437,476	$334,298	$103,178	30.9%

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City of Independence, KS Retail Leakage Analysis

Retail Sector	Retail Sales of Independence Establishments (Supply-Retail Sales)	Retail Purchases of Independence Residents (Demand-Retail Potential)	Retail Leakage	Leakage / Surplus Factor*
Total Retail Sales	$112,619,520	$71,484,042	$41,135,478	57.5%
Motor Vehicle & Parts Dealers	$30,307,832	$14,415,990	$15,891,842	110.2%
Automobile Dealers	$28,170,408	$12,176,872	$15,993,536	131.3%
Other Motor Vehicle Dealers	$0	$1,027,044	-$1,027,044	-100.0%
Auto Parts, Accessories, and Tire Stores	$2,137,424	$1,212,074	$925,350	76.3%
Furniture & Home Furnishings Stores	$1,318,054	$1,216,925	$101,129	8.3%
Furniture Stores	$1,038,030	$1,024,024	$14,006	1.4%
Home Furnishings Stores	$280,024	$192,901	$87,123	45.2%
Electronics & Appliance Stores	$1,090,163	$708,794	$381,369	53.8%
Bldg Materials, Garden Equip. & Supply Stores	$3,347,598	$2,197,577	$1,150,021	52.3%
Building Material and Supplies Dealers	$2,023,901	$1,903,508	$120,393	6.3%
Lawn and Garden Equipment and Supplies Stores	$1,323,697	$294,069	$1,029,628	350.1%
Food & Beverage Stores	$4,267,449	$9,817,994	-$5,550,545	-56.5%
Grocery Stores	$3,023,406	$8,923,673	-$5,900,267	-66.1%
Specialty Food Stores	$0	$80,823	-$80,823	-100.0%
Beer, Wine, and Liquor Stores	$1,244,043	$813,498	$430,545	52.9%
Health & Personal Care Stores	$2,837,252	$1,706,001	$1,131,251	66.3%
Gasoline Stations	$11,352,604	$11,435,760	-$83,156	-0.7%
Clothing and Clothing Accessories Stores	$867,437	$701,613	$165,824	23.6%
Clothing Stores	$634,749	$473,536	$161,213	34.0%
Shoe Stores	$232,688	$137,079	$95,609	69.7%
Jewelry, Luggage, and Leather Goods Stores	$0	$90,998	-$90,998	-100.0%
Sporting Goods, Hobby, Book, and Music Stores	$64,876	$98,999	-$34,123	-34.5%
Sporting Goods/Hobby/Musical Instrument Stores	$64,876	$34,037	$30,839	90.6%
Book, Periodical, and Music Stores	$0	$64,962	-$64,962	-100.0%
General Merchandise Stores	$35,038,702	$14,636,856	$20,401,846	139.4%
Department Stores Excluding Leased Depts.	$24,496,061	$7,972,139	$16,523,922	207.3%
Other General Merchandise Stores	$10,542,641	$6,664,717	$3,877,924	58.2%
Miscellaneous Store Retailers	$1,329,969	$817,922	$512,047	62.6%
Florists	$247,829	$108,026	$139,803	129.4%
Office Supplies, Stationery & Gift Stores	$505,821	$305,231	$200,590	65.7%
Used Merchandise Stores	$112,216	$57,114	$55,102	96.5%
Other Miscellaneous Store Retailers	$464,103	$347,551	$116,552	33.5%
Nonstore Retailers	$1,219,949	$3,832,528	-$2,612,579	-68.2%
Electronic Shopping & Mail-Order Houses	$891,422	$2,967,327	-$2,075,905	-70.0%
Vending Machine Operators	$0	$151,180	-$151,180	-100.0%
Direct Selling Establishments	$328,527	$714,021	-$385,494	-54.0%
Food Services & Drinking Places	$19,577,635	$9,897,083	$9,680,552	97.8%
Full-Service Restaurants	$9,181,131	$4,016,514	$5,164,617	128.6%
Limited-Service Eating Places	$9,925,377	$5,520,696	$4,404,681	79.8%
Special Food Services	$0	$9,255	-$9,255	-100.0%
Drinking Places - Alcoholic Beverages	$471,127	$350,618	$120,509	34.4%

* Leakage factor is defined as the percentage less than the demand being supplied within a given retail category. For example, a leakage of 50% indicates that only half of the demand is currently being supplied. Surplus factor is defined as the percentage greater than the demand being supplied within a given retail category. A surplus of 50% indicates that the supply exceeds the demand by 50%.

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APPENDIX D: RETAIL SITE SELECTION CRITERIA SAMPLES

Site Selection Criteria Sample

Red Robin Gourmet Burgers – Site Selection Criteria

Red Robin believes that site selection is critical to its success and devotes substantial time and effort evaluating each prospective site. Our site selection criteria focuses on identifying markets, trade areas and other specific sites that are likely to yield the greatest density of desirable demographic characteristics, heavy retail traffic and a highly visible site. Approved sites generally have a population of at least 70,000 people within a three-mile radius and at least 100,000 people within a five-mile radius. Sites generally require a strong daytime and evening population, adequate parking and a visible and easy entrance and exit. In addition, Red Robin typically selects locations with a demographic profile that have a household income average of $70,000 and have a high population of females and families.

In order to maximize our market penetration potential, Red Robin has developed a flexible physical site format that allows us to operate in a range of real estate venues located near high activity areas such as regional malls, lifestyle centers, big box shopping centers and entertainment centers. Our prototype restaurant is a free-standing building with approximately 6,350 square feet, approximately 213 seats and patio seating. Based on this prototype, our average cash investment for a restaurant is approximately $2.4 million, excluding land and pre-opening costs. We typically operate our restaurants under operating leases for land on which we build our restaurants.

Site Selection Criteria Sample

Red Lobster Seafood Restaurants – Site Selection Criteria

Building Criteria:

- 5,880 sq. ft.
- 1.75 acres of land
- Prime regional focal point
- 125 parking spaces depending on available common parking
- 26' building height

Preference is to own real estate, but will consider ground leases. Typical lease terms if purchase not available:

- Negotiable base rent
- Negotiable common area maintenance
- Pro-rata tax and insurance
- 10 year initial term with four 5-year renewal options

Demographic Requirements

- Population in trade area with 125,000 people
- Prime regional locations, lifestyle and power centers

Site Selection Criteria Sample

Olive Garden Italian Restaurant – Site Selection Criteria

Building Criteria

- 7,500 – 8,500 sq. ft.
- Land to accommodate our prototype building and 125 – 145 parking spaces
- Prime regional focal point
- 22' building height (with architectural features of to 28' depending on location)

Preference is to own real estate, but will consider ground leases. Typical lease terms if purchase not available:

- Negotiable base rent
- Negotiable common area maintenance
- Pro-rata tax and insurance
- 10 year initial term with four 5-year renewal options

Demographic Requirements

- Population in trade area with 100,000 people exclusive to the restaurant
- Prime regional location for the trade area

Additional Considerations

- End-cap/building lease will be considered on a case-by-case basis with emphasis on parking, visibility, access and our ability to use prototypical Olive Garden exterior branding and signage.
- Darden Restaurants, the parent company of Olive Garden, has designed several restaurants nationwide that have earned LEED certification. Going forward all of our restaurants will have sustainable elements, although all will not be LEED certified. Some of the sustainable design elements include recycled building materials, enlarged windows to increase natural light, low-water landscaping and energy-efficient equipment. These enhancements are part of the Sustainable Restaurant Design initiative launched by Darden Restaurants.

Site Selection Criteria Sample

Buffalo Wild Wings Grill & Bar – Site Selection Criteria

Location:

- Freestanding pad-site locations, on hard corner
- End caps
- 4,000 - 7,000 sq. ft., 120 parking places
- Excellent signage and visibility
- Excellent site ingress/egress with traffic signal
- Seven-day-per-week liquor sales

Trade Area:

- Minimum 40,000 population, 80% or greater between the ages of 20 and 50 within the trade area, $30,000 or greater median household income within the trade area
- Minimum daytime/lunch population of 10,000

Traffic Generators:

- Lifestyle or power centers with "big box" anchors: Old Navy, Petsmart, Kohl's, Home Depot, Lowe's, etc.
- National casual dining brands in a contiguous restaurant corridor
- Super Wal-Mart, Super Target
- Regional, super-regional malls
- Colleges, universities
- Healthcare corridors
- Movie Theaters (Stadium Seating - First Runs)

Traffic:

- Minimum daily traffic count in front of site - 25,000
- Minimum daily traffic count on adjacent side street - 10,000
- P.M. traffic side, far side of light

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APPENDIX E: ADDITIONAL BEST PRACTICE EXAMPLES

Best Practice

Elmhurst, IL – Part-Time Retail Consultant & Downtown Retail Development

The City of Elmhurst, Illinois (2011 population of 44,439) recognized the limited potential to attract big-box retailers to their community (Elmhurst is a landlocked inner-ring suburb in the Chicago metro area) and decided to focus its efforts on offering incentive programs (Retail Grant Program, Façade Improvement Program, and Tax Increment Financing) to develop local retail businesses and support entrepreneurship within the city. In order to qualify for any of the city's grant programs, businesses or potential entrepreneurs are required to provide retail offerings that match or complement the community's existing retail needs. Many of Elmhurst's targeted retail niches are related to entertainment and apparel due to the opening of a major cinema in the downtown, which is housed in a historic theater building. The cinema has increased foot traffic in downtown Elmhurst and has been used as a tool to attract additional local retailers.

In an effort to capitalize on the increased local business activity in downtown, the City of Elmhurst, its merchant association, and chamber of commerce have teamed up to hire a part-time retail consultant that is responsible for establishing relationships with potential retailers and developers, developing new ideas/actions to expand retail options in Elmhurst, and visiting other communities to learn about retail competition. The retail consultant (in addition to the inter-organizational partnerships and strong leadership from the city) has played a key role in the attraction of multiple restaurants and new retailers to downtown Elmhurst.

For more information, visit:
http://www.elmhurst.org/index.aspx?NID=1063

Best Practice

Silverthorne, CO – Enhanced Sales Tax Incentive Program

The Town of Silverthorne, Colorado (2010 population of 3,887) established an Enhanced Sales Tax Incentive Program (ESTIP) in 2001 for the purpose of encouraging the overall growth of retail sales in their community. The ESTIP provides retailers and developers who have invested in capital projects related to public or private improvements to receive a reimbursement based on generated retail sales tax. Participating retailers and developers receive reimbursements based on a share of generated sales taxes set by the community. Because of the program's success in supporting the expansion of the town's retail market, including the attraction of Target and a Lowe's Home Improvement, the ESTIP was expanded in 2012 to allow for a lower minimum threshold of enhanced sales taxes and an expanded definition of public and public-related purposes for which enhanced sales taxes can be used.

For more information visit:
http://www.silverthorne.org/index.aspx?page=781

Best Practice

Oak Park, IL – Retail Support Grant Program

The Village of Oak Park, Illinois (2011 population of 52,104) used its "Retail Support Grant Program" to redesign and redevelop outdated retail spaces to make them more attractive for existing and potential retailers. If eligible for the program, businesses partner with the village and are awarded one third of the associated renovation or redesign costs for the retail space.

Eligible renovation expenses include:

- Floor, wall, and ceiling repairs
- Upgrading of mechanical systems
- Redesign/redevelopment of work space, including demolition
- Installation of fixtures
- Cosmetic updates (painting, ceiling coverings, resurfacing walls and floors)
- Coverage of basic administrative building costs (building permits)

In order to participate in the grant program, retail businesses must:

- Receive 51% of gross income from retail sales
- Be a current and active member of a business association
- Offer retail products that fill a need in the community or complement existing retail offerings
- Comply with the Americans with Disabilities Act
- Obtain competitive bids from contractors

The primary goal of the Retail Support Grant Program is to enhance the quality of Oak Park's existing retail space. Additional goals of the program include increased sales tax revenue for the village and an improved quality of life for its residents.

For more information visit:
http://www.oak-park.us/rfq/Retail_Rehab_Grants.html

Best Practice

Riverside County, CA – Fast Track Program

Communities that offer a streamlined and efficient permitting process save valuable time and money for developers and retailers looking to establish a new business facility. Many communities have realized this and are now offering a "Fast-Track" service to developers and retailers, which accelerates the process of obtaining zoning and permitting and other associated requirements to build or lease commercial space. In order to be eligible for the streamlined service, communities often set basic requirements that a developer must meet before an application is slated for the service. Most cities and counties that offer an accelerated development review service have a dedicated staff member who guides eligible retailers or developers throughout the process.

The Riverside County, California Economic Development Agency (EDA) Fast Track Program is a good example of a successful streamlined development review program. The EDA's Fast Track Program has played a key role in the successful attraction/expansion of numerous major employers to Riverside County including: Anheuser-Busch, Nestle Food Company, Millard Refrigerated Services, Meldisco Corporation, Spacemasters Corporation, Home Express, and Cutler-Hammer. The program requires companies to meet at least one of the below criteria in order to be eligible for the program:

- Create at least 75 permanent, full-time jobs
- Invest a total of at least $10 million in land, buildings, and/or equipment
- Produce $25 million in taxable annual sales

.

Once a project meets one of the three requirements they will receive the following benefits:

- A business-friendly EDA professional will guide the project through the process expeditiously
- A final public hearing within 60 days
- Grading and building plan checks within 14 days

For more information visit:
http://www.rivcoeda.org/EconomicDevelopment/BusinessServices/FastTrackProgram/tabid/469/Default.aspx

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ABOUT ANGELOUECONOMICS

ANGELOUECONOMICS

AngelouEconomics partners with client communities and regions across the United States and abroad to candidly assess current economic development realities and identify opportunities.

Our goal is to leverage the unique strengths of each region to provide new, strategic direction for economic development

As a result, AngelouEconomics' clients are able to diversify their economies, expand job opportunities and investment, foster entrepreneurial growth, better prepare their workforce, and attract 'new economy' companies.

To learn more, visit **www.angeloueconomics.com**

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