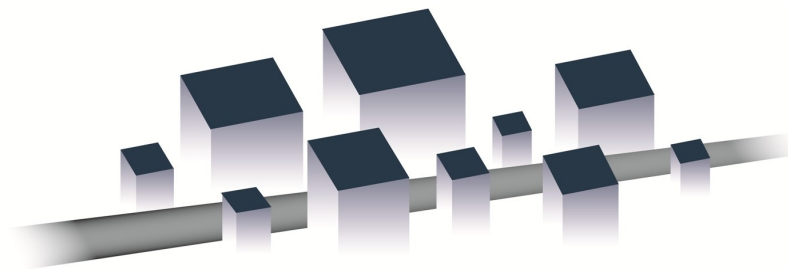


CITY OF
PRYOR, OK

RETAIL MARKET INFORMATION

2015



RETAIL ATTRACTIONS, LLC

Economic Development Consulting

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ABOUT THE CITY OF PRYOR

LOCATION AND ACCESSIBILITY

Pryor is strategically located in northeast Oklahoma on Highway 69 just 15 miles east of Interstate 44 and 35 miles east of Tulsa. Pryor is home to MidAmerica Industrial Park, one of the country's largest industrial parks which is home to nearly 80 companies ranging from small entrepreneurial operations to Fortune 500 companies like Google, Chevron and DuPont. Located in the foothills of the Ozark Mountains, 15 miles from Grand Lake and 8 miles from Lake Hudson, the beautiful scenery around Pryor attracts all who love the outdoor life.

DEVELOPMENT ASSETS AND CONCERNS

The City of Pryor has created an environment in the community that is pro-growth and pro-business. Although growth has been slow, Pryor did show positive growth over the last decade unlike countless other rural Oklahoma communities. This growth can be largely attributed to the MidAmerica Industrial Park which provides a wide variety of employment opportunities. Residential construction totals show an increase of 143 new residential permits in the city limits over the past five years totaling nearly \$17 million in value. The City administration understands the necessity for public-private partnerships to facilitate retail development and works to make the development process as streamlined as possible.

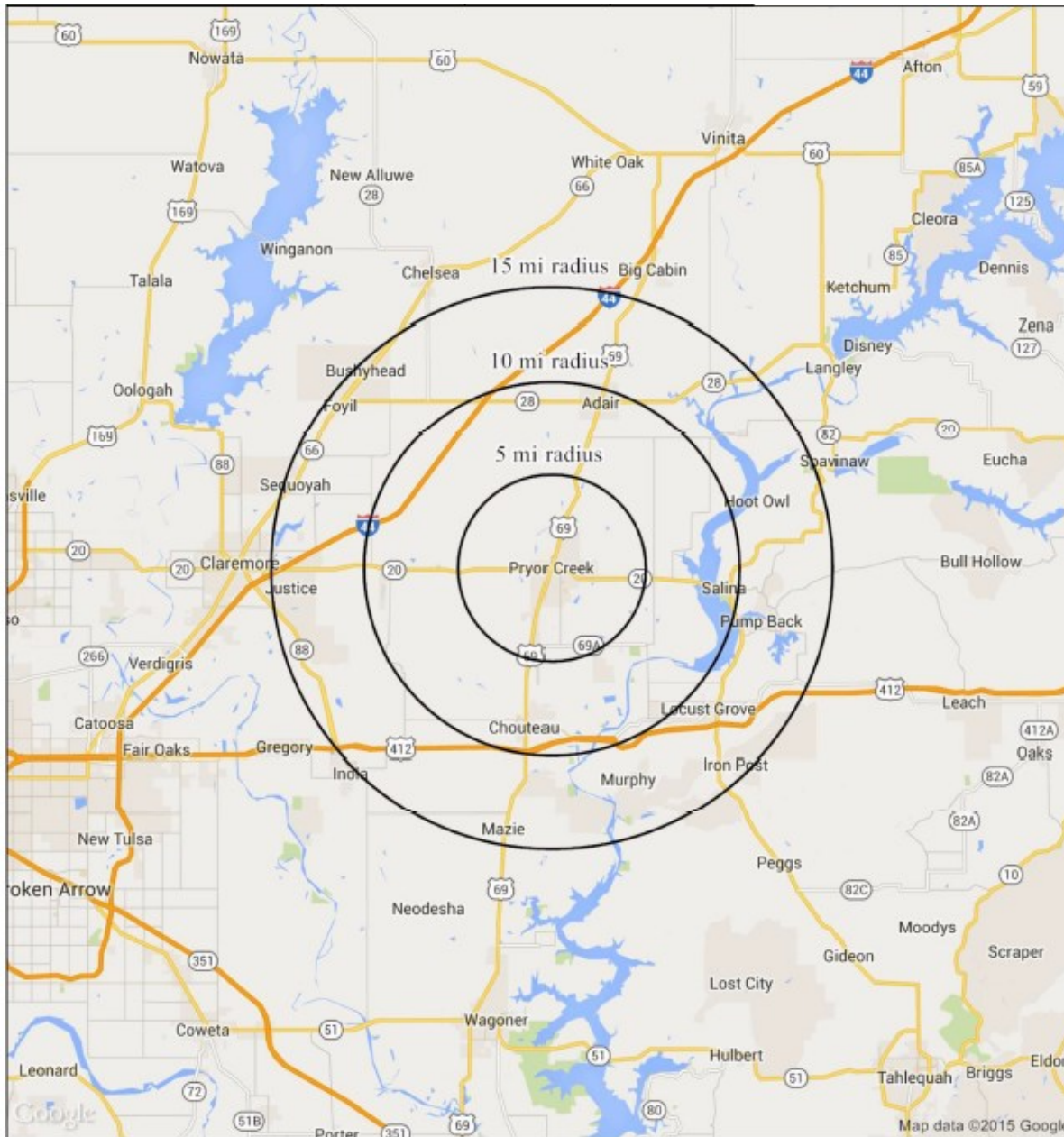
BUSINESS ENVIRONMENT

Pryor has created an environment to encourage growth in their residential, industrial and retail sectors. The City of Pryor is a proactive community who understands the necessity of incentives in today's economic climate. Businesses that generate direct sales tax revenue looking to locate or expand within the city limits are encouraged to inquire about programs and incentives available from the city.

POPULATION / GROWTH

	Estimated 2015 1st Qtr Population	Estimated Projected Population 2020	Population 2010 Census
City Limits	9,394	9,363	9,539
5 Mile Radius	12,489	12,478	12,664
10 Mile Radius	25,426	25,377	25,805
15 Mile Radius	47,995	48,100	48,486

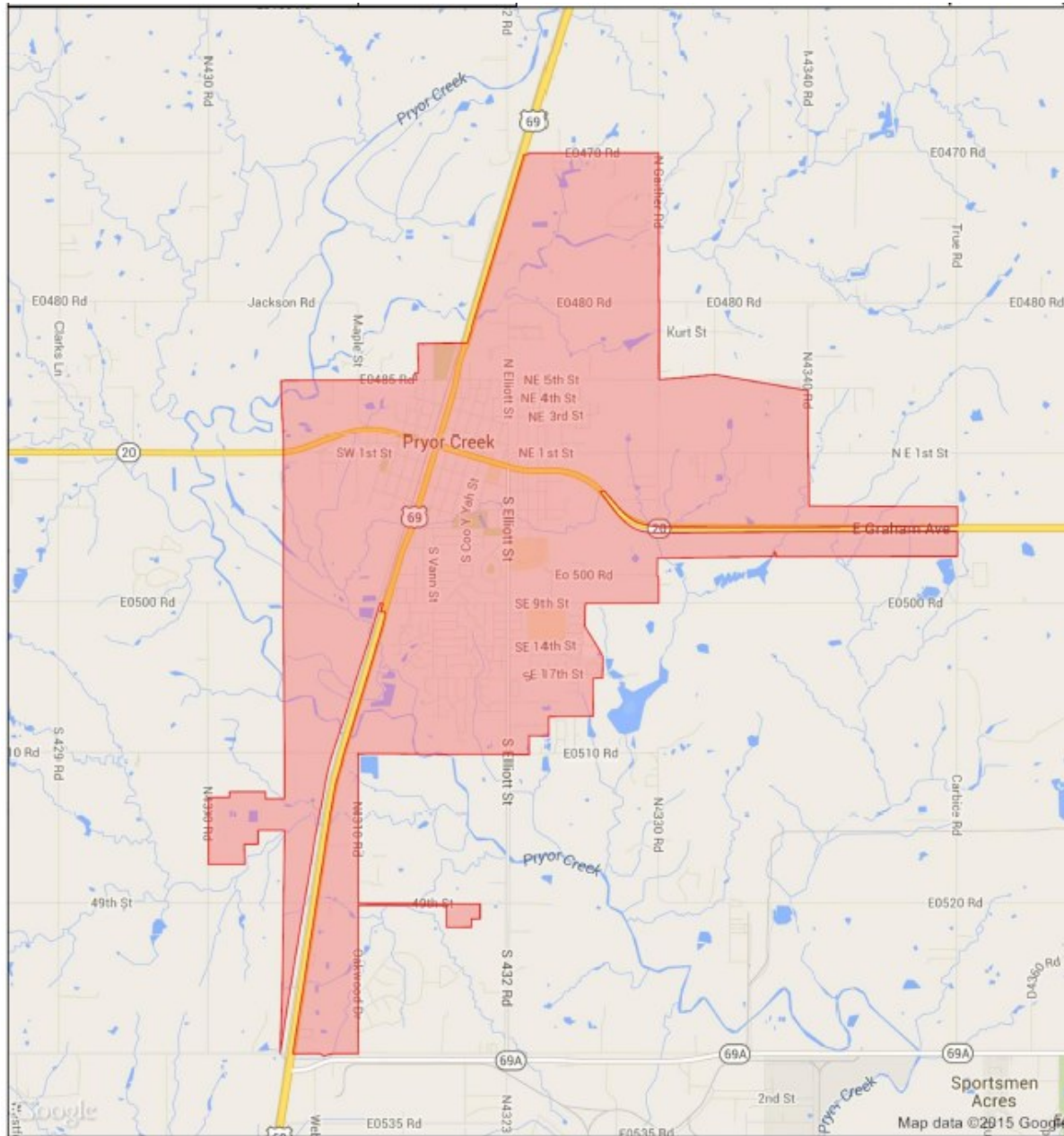
RETAIL ENVIRONMENT



The data represents the consumers located within 5, 10, 15 miles of Pryor. Concentric rings are good for a quick overview but without taking into account neighboring markets, natural barriers, traffic flow, accessibility and convenience to the trade area is not accurately determined. The appropriate ring diameter is determined by the retail draw of the retailer.

RETAIL ENVIRONMENT

City Limits (Regis Radis Sandbox)



RETAIL ENVIRONMENT

City Limits

A category with retail leakage indicates revenue leaving a market and an unmet demand in that category. When consumers from an area are spending more for goods than the businesses in the area are providing, that area has a retail leakage. Categories with retail leakage suggest that the area can support additional retailers in the categories. Several categories in Pryor city limits show significant leakages as shown below. The total leakage includes categories not listed in the table below. The categories listed are highlighted categories that show substantial leakage in the market. Surplus categories in the market indicate a pull factor evident by consumers coming into the trade area from outside the community to purchase specific goods and services. Several categories in Pryor's city limits have impressive surpluses indicating a regional pull of consumers.

RETAIL CATEGORY ANNUAL LEAKAGE	City Limits
Food & Beverage Stores	\$10,473,550
Non-Store Retailers	\$8,262,122
Automotive Dealers	\$8,094,094
Other Gasoline Stations	\$3,975,082
Sporting Goods, Hobby, Book, Music Stores	\$2,276,722
Appliance, TV, Electronics Stores	\$1,904,696
Furniture Stores	\$1,088,157
Hardware Stores	\$929,721
Drinking Places - Alcoholic Beverages	\$256,043
Luggage & Leather Goods Stores	\$246,116
<u>TOTAL LEAKAGE</u>	<u>\$37,506,303</u>

*The total leakage includes categories not listed in the table above

RETAIL ENVIRONMENT

5 Mile Radius

A category with retail leakage indicates revenue leaving a market and an unmet demand in that category. When consumers from an area are spending more for goods than the businesses in the area are providing, that area has a retail leakage. Categories with retail leakage suggest that the area can support additional retailers in the categories. Several categories in Pryor city limits show significant leakages as shown below. The total leakage includes categories not listed in the table below. The categories listed are highlighted categories that show substantial leakage in the market. Surplus categories in the market indicate a pull factor evident by consumers coming into the trade area from outside the community to purchase specific goods and services. Several categories in Pryor's city limits have impressive surpluses indicating a regional pull of consumers.

RETAIL CATEGORY ANNUAL LEAKAGE	5 MILE RADIUS
Food & Beverage Stores	\$16,556,720
Non-Store Retailers	\$11,299,635
Gasoline Stations	\$5,438,578
Sporting Goods, Hobby, Book, Music Stores	\$3,126,143
Appliance, TV, Electronics Stores	\$2,609,421
Furniture Stores	\$1,510,114
Full-Service Restaurants	\$889,161
Hardware Stores	\$424,120
Luggage & Leather Goods Stores	\$338,234
<u>TOTAL LEAKAGE</u>	<u>\$42,192,126</u>

*The total leakage includes categories not listed in the table above

RETAIL ENVIRONMENT

10 Mile Radius

A category with retail leakage indicates revenue leaving a market and an unmet demand in that category. When consumers from an area are spending more for goods than the businesses in the area are providing, that area has a retail leakage. Categories with retail leakage suggest that the area can support additional retailers in the categories. Several categories in Pryor city limits show significant leakages as shown below. The total leakage includes categories not listed in the table below. The categories listed are highlighted categories that show substantial leakage in the market. Surplus categories in the market indicate a pull factor evident by consumers coming into the trade area from outside the community to purchase specific goods and services. Several categories in Pryor's city limits have impressive surpluses indicating a regional pull of consumers.

RETAIL CATEGORY ANNUAL LEAKAGE	10 MILE RADIUS
Food & Beverage Stores	\$40,215,267
Non-Store Retailers	\$26,998,177
Full-Service Restaurants	\$10,554,996
Sporting Goods, Hobby, Book, Music Stores	\$6,538,903
Appliance, TV, Electronics Stores	\$5,304,842
Home Centers	\$4,401,581
Furniture Stores	\$3,329,284
Automotive Parts/Accessories, Tire Stores	\$1,216,816
Luggage & Leather Goods Stores	\$693,518
Pharmacies & Drug Stores	\$618,663
<u>TOTAL LEAKAGE</u>	<u>\$99,872,047</u>

*The total leakage includes categories not listed in the table above

RETAIL ENVIRONMENT

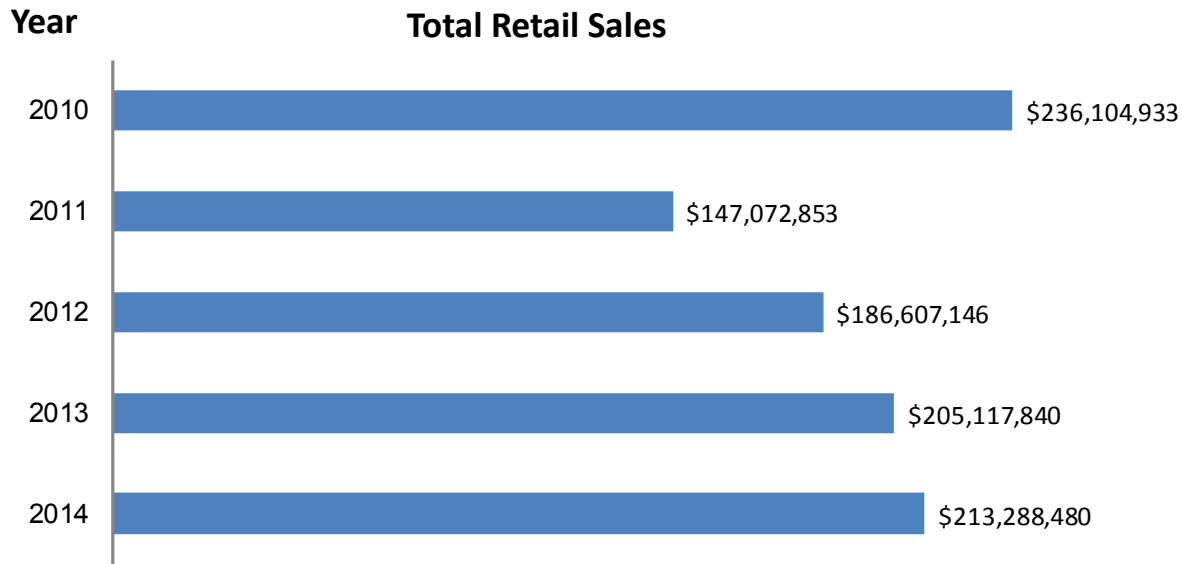
15 Mile Radius

A category with retail leakage indicates revenue leaving a market and an unmet demand in that category. When consumers from an area are spending more for goods than the businesses in the area are providing, that area has a retail leakage. Categories with retail leakage suggest that the area can support additional retailers in the categories. Several categories in Pryor city limits show significant leakages as shown below. The total leakage includes categories not listed in the table below. The categories listed are highlighted categories that show substantial leakage in the market. Surplus categories in the market indicate a pull factor evident by consumers coming into the trade area from outside the community to purchase specific goods and services. Several categories in Pryor's city limits have impressive surpluses indicating a regional pull of consumers.

RETAIL CATEGORY ANNUAL LEAKAGE	15 MILE RADIUS
Food & Beverage Stores	\$81,951,283
Non-Store Retailers	\$56,644,372
Automotive Dealers	\$46,645,636
Food Service & Drinking Places	\$37,985,214
Pharmacies & Drug Stores	\$12,317,797
Sporting Goods, Hobby, Book, Music Stores	\$11,776,166
Appliance, TV, Electronics Stores	\$9,891,766
Clothing & Clothing Accessories Stores	\$6,350,180
Home Centers	\$6,304,358
Furniture Stores	\$6,224,232
<u>TOTAL LEAKAGE</u>	<u>\$276,091,004</u>

*The total leakage includes categories not listed in the table above

TOTAL RETAIL SALES



Sales tax revenue is an indicator of the health of the existing retailers and in the fiscal health of city government. As shown in the chart, the sales tax revenue has shown a steady increase in retail sales in the community over the last 5 years indicating fiscal health and retail market increases and growth.

POPULATION BY AGE

Group

Age 55-84 is the largest percentile in population by age category

City Limits—2015 Census

Age 0—14	2,057	21.9%
Age 15—20	805	9.1%
Age 21—34	1,742	18.6%
Age 35—54	2,164	23.0%
Age 55—84	2,332	24.8%
Over 85	249	2.7%

5 Mile Radius—2015 Census

Age 0—14	2,657	21.3%
Age 15—20	1,103	8.8%
Age 21—34	2,211	17.7%
Age 35—54	2,963	23.7%
Age 55—84	3,269	26.2%
Over 85	288	2.3%

10 Mile Radius—2015 Census

Age 0—14	5,309	20.9%
Age 15—20	2,223	8.7%
Age 21—34	4,303	16.9%
Age 35—54	6,180	24.3%
Age 55—84	6,934	27.3%
Over 85	478	1.9%

15 Mile Radius—2015 Census

Age 0—14	9,528	19.9%
Age 15—20	4,177	8.7%
Age 21—34	7,783	16.2%
Age 35—54	11,960	24.9%
Age 55—84	13,741	28.6%
Over 85	805	1.7%

POPULATION BY INCOME

City Limits—2015 Estimate

Average Household Income	\$51,650
Median Household Income	\$42,675
Average Household Size	2.41

5 Mile Radius—2015 Estimate

Average Household Income	\$55,193
Median Household Income	\$46,178
Average Household Size	2.47

10 Mile Radius—2015 Estimate

Average Household Income	\$56,213
Median Household Income	\$47,620
Average Household Size	2.56

15 Mile Radius—2015 Estimate

Average Household Income	\$55,947
Median Household Income	\$47,318
Average Household Size	2.59

POPULATION BY ETHNICITY

Single Classification Race

City Limits—2015 Estimate

White	6,584	70.1%
African American	97	1.0%
Hispanic	595	6.3%
American Indian	1,635	17.4%
Other	1,078	11.5%

5 Mile Radius—2015 Estimate

White	8,689	69.6%
African American	111	0.9%
Hispanic	703	5.6%
American Indian	2,138	17.1%
Other	3,689	12.4%

10 Mile Radius—2015 Estimate

White	17,481	68.8%
African American	164	0.7%
Hispanic	1,039	4.1%
American Indian	4,723	18.6%
Other	3,059	12.0%

15 Mile Radius—2015 Estimate

White	32,772	68.3%
African American	266	0.6%
Hispanic	1,637	3.4%
American Indian	9,258	19.3%
Other	5,699	11.9%

POPULATION BY AGE

Male/Female | Median Age/Average Age

City Limits—2015 Census

Male Population	4,547	48.4%
Estimated Median Age		33.2
Estimated Average Age		35.7
Female Population	4,847	51.6%
Estimated Median Age		38.0
Estimated Average Age		40.0

5 Mile Radius—2015 Census

Male Population	6,079	48.7%
Estimated Median Age		34.9
Estimated Average Age		36.8
Female Population	6,410	51.3%
Estimated Median Age		38.9
Estimated Average Age		40.2

10 Mile Radius—2015 Census

Male Population	12,501	49.2%
Estimated Median Age		36.6
Estimated Average Age		37.6
Female Population	12,925	50.8%
Estimated Median Age		39.3
Estimated Average Age		40.0

15 Mile Radius—2015 Census

Male Population	23,805	49.6%
Estimated Median Age		38.5
Estimated Average Age		38.7
Female Population	24,190	50.4%
Estimated Median Age		40.5
Estimated Average Age		40.7

POPULATION BY WORKFORCE

City Limits—2015 Estimate

Employed Population 16+	7,192	
Employed	3,638	50.6%
Unemployed	433	6.0%
Not in Labor Force	3,121	43.4%

5 Mile Radius—2015 Estimate

Employed Population 16+	9,644	
Employed	5,081	52.7%
Unemployed	522	5.4%
Not in Labor Force	4,041	41.9%

10 Mile Radius—2015 Estimate

Employed Population 16+	19,734	
Employed	10,637	53.9%
Unemployed	983	5.0%
Not in Labor Force	8,113	41.1%

15 Mile Radius—2015 Estimate

Employed Population 16+	37,746	
Employed	20,440	54.2%
Unemployed	1,816	4.8%
Not in Labor Force	15,489	41.0%

POPULATION / EDUCATION

Population by education attainment indicates
ages 25+

City Limits—2015 Census

High School Graduate (or GED)	2,265	37.6%
Some College (No Degree)	1,565	26.0%
Associate or Bachelor Degree	1,139	18.9%
Master's Degree	283	4.7%

5 Mile Radius—2015 Census

High School Graduate (or GED)	2,970	36.6%
Some College (No Degree)	2,154	26.5%
Associate or Bachelor Degree	1,599	19.7%
Master's Degree	358	4.4%

10 Mile Radius—2015 Census

High School Graduate (or GED)	5,962	35.9%
Some College (No Degree)	4,232	25.5%
Associate or Bachelor Degree	3,406	20.5%
Master's Degree	668	4.0%

15 Mile Radius—2015 Census

High School Graduate (or GED)	11,613	36.5%
Some College (No Degree)	8,003	25.2%
Associate or Bachelor Degree	6,512	20.5%
Master's Degree	1,221	3.8%

HOUSING INFORMATION

City Limits—2015 Estimate

Median Value of All Owner Occupied Housing	\$110,512	
Owner Occupied Housing Units	2,264	60.2%
Renter Occupied Housing Units	1,497	39.8%
Housing Units Built 2010 or Later	67	1.6%

5 Mile Radius—2015 Estimate

Median Value of All Owner Occupied Housing	\$122,964	
Owner Occupied Housing Units	3,222	65.4%
Renter Occupied Housing Units	1,706	34.6%
Housing Units Built 2010 or Later	84	1.5%

10 Mile Radius—2015 Estimate

Median Value of All Owner Occupied Housing	\$121,705	
Owner Occupied Housing Units	7,010	71.7%
Renter Occupied Housing Units	2,770	28.3%
Housing Units Built 2010 or Later	124	1.1%

15 Mile Radius—2015 Estimate

Median Value of All Owner Occupied Housing	\$122,746	
Owner Occupied Housing Units	14,197	77.5%
Renter Occupied Housing Units	4,123	22.5%
Housing Units Built 2010 or Later	314	1.5%

OPPORTUNITY GAP CATEGORY INFORMATION

Vehicle and Parts Dealers

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

Furniture and Home Furnishings Stores

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

Electronics and Appliance Stores

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

Building Materials and Garden Supply Stores

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

Food and Beverage Stores

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

Health and Personal Care Stores

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

Gasoline Stations

Gasoline stations and gasoline stations with convenience stores

Clothing and Clothing Accessories Stores

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

Sporting Goods and Hobby Stores

Sporting goods stores, hobby stores, toy stores, sewing and needlepoint stores, musical instrument and supply stores, book stores, newsstands, music stores

General Merchandise Stores

Department stores and other general merchandise stores

Miscellaneous Store Retailers

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

Foodservice and Drinking Places

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

ABOUT US

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

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

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

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

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

OUR STAFF



RICKEY HAYES

PRINCIPAL

Prior to founding Retail Attractions, LLC, while working in municipal economic development, Rickey Hayes facilitated new commercial construction totaling more than 10 million square feet with more than a half of a billion dollars in total value, resulting in a city sales tax and ad valorem based more than triple what it had been. Since beginning Retail Attractions, Rickey has helped cities launch millions of square feet of additional retail space and reap the associated benefits in additional revenues, additional goods and services for their citizens, and directly improved the quality of life in those communities. Rickey has developed an extensive personal network of relationships in the area of government relations, retail, restaurant and land development, real estate and site selection, leasing and tenancing, engineering and creative financing and incentives to expedite the success of public / private partnerships for development projects.

Rickey holds a Bachelor's Degree in Criminal Justice and a Master's Degree in Counseling from Great Plains Baptist College, and Rickey is a member of International Council of Shopping Centers (ICSC). Rickey and his wife, Wendy, live in Owasso, Oklahoma and have four children and three grandchildren.



MICAH HAYES

CITY DATA/RESEARCH

Micah has been employed by Retail Attractions since inception and is responsible for the collection of data on our client cities. Micah and his wife reside in Austin, Texas.

RONALD CATES—GENERAL COUNSEL

ROBERT NICHOLS—IT/WEBSITE & DATA PROTECTION

TED TURNER—SALES TAX, DATA & FORECASTING

PAT FRY—OFFICE ADMINISTRATION, ACCOUNTING

DAWN McLERRAN— MARKET DATA, ACCOUNTING

LIZ PRUITT— MARKETING, REAL ESTATE SERVICES

OUR METHODOLOGY

Our Approach

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

Market Assessment

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

Retail Recruitment

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

The Benefits

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

OUR DATA

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

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

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

The demographic data contained in this report comes from AGS, and the opportunity gap data comes from Nielsen Claritas Retail Market Power™ (RMP). The RMP data allows the comparison of supply and demand to determine potential sources of revenue growth at any standard or user defined geographic level.

ACKNOWLEDGEMENTS AND DISCLAIMER

ACKNOWLEDGEMENTS

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

DISCLAIMER

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

*In some data categories, not 100% of population is referenced