

CENTRAL OKLAHOMA ECONOMIC DEVELOPMENT DISTRICT

2022-2026 COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

COEDD

A REGIONAL COUNCIL OF GOVERNMENT

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INTRODUCTION

The Central Oklahoma Economic Development District (COEDD), or Sub-state Planning District #5, was formed in 1967. COEDD provides economic development services to Hughes, Lincoln, Okfuskee, Pawnee, Payne, Pottawatomie, and Seminole counties. The organization has secured over \$20 million in grant funding through the EDA, and those grant funds have created more than 5,000 jobs in the region. The priorities of the organization are to improve infrastructure, create jobs, and improve local economies throughout the region. COEDD contributes planning assistance and consultation to member communities through two funding agencies: Oklahoma Department of Commerce and the U.S. Economic Development Administration (EDA). COEDD provides access, technical assistance, and administrative oversight for federal and state grant programs including Community Development Block Grants (CDBG), Rural Economic Action Plan (REAP).

What is a CEDS?

“ A Comprehensive Economic Development Strategy (CEDS) is a unified, regionally focused action plan that provides a framework for an area’s economic growth and community development. ”

A diverse working group of local representatives from private, public, and nonprofit sectors developed the CEDS to identify regional opportunities and align stakeholder priorities in order to actualize the community’s goals and strategies. This working group builds on local partnerships to implement the action plan and meet performance measures for economic and community development at the regional, state, and federal levels. The following sections form the basis for the Central Oklahoma Economic Development District (COEDD) Comprehensive Economic Development Strategy (CEDS).

This CEDS will include:

- *Summary Background* of the region’s economic conditions and demographics
- *SWOT Analysis* to identify the region’s strengths, weaknesses, opportunities, and threats
- *Strategic Direction* – to incorporate tactics identified through the planning process, other plans, and stakeholder feedback to develop the priority strategies for the region
- *Evaluation Framework* – to identify and monitor performance measures associated with the plan.
- *Economic Resilience* – to assess and develop strategies for improving the region’s ability to prepare for and respond to economic shocks.

How to use this plan:

This plan outlines goals and strategies to strengthen the regional economy, improve quality of life, and develop and retain talent. This plan will guide the program of work for the Central Oklahoma Economic Development District from 2022-2026.

SUMMARY BACKGROUND

Historical Overview

The Central Oklahoma Economic Development District (COEDD), is comprised of seven counties, including Hughes, Lincoln, Okfuskee, Pawnee, Payne, Pottawatomie, and Seminole. The district is located just east of the center of Oklahoma and stretches north to south. The district also lies in between the metropolitan areas of Oklahoma City and Tulsa and is bounded by the Arkansas River to the North, and the South Canadian River to the South.

The COEDD District has been impacted by several events throughout history and reflects many of the same characteristics of the state. Around the 1900's the COEDD area land belonged to Indian Territory and contained nine tribes, the largest being Creek Nation. In 1903, the land was opened for sale, with many of the Indian owners' selling to purchasers who were small farmers trying to make a living.

In the early 1920's oil was found in the region's borders and the economy of the region "boomed". For a short period of time, Seminole County accounted for 1/3rd of all oil produced in the world. With a booming economy, in 1930, the population peaked at 360,283 people. With over production of oil nationally, the

area subsided and entered a "bust" cycle, as people who were in search of new jobs began to migrate out. The region lost more than 150,000 people in a 30-year span, and today, after a slow recovery of population, currently resides at roughly 250,000 people.

There is no denying the oil industry has had an incredible effect on the history of the region. That said, the COEDD Region has battled population and business loss over the years and now has several stable, reliable, and growing communities. Stillwater and Shawnee, Oklahoma, both county seats and holding Universities in their cities, are growth centers for the region. The region has also seen strong growth in a multitude of industries, including the transportation, healthcare, and government sectors. Educational attainment has risen in the region in the past 20 years, and the region holds a strong network of Technology Centers offering several different programs and certificates. While the region has benefitted from rapid infusions of oil money, encouraging growth in new and emerging sectors as well as improving the quality of life in the region are both primary goals of the COEDD region moving into the future.

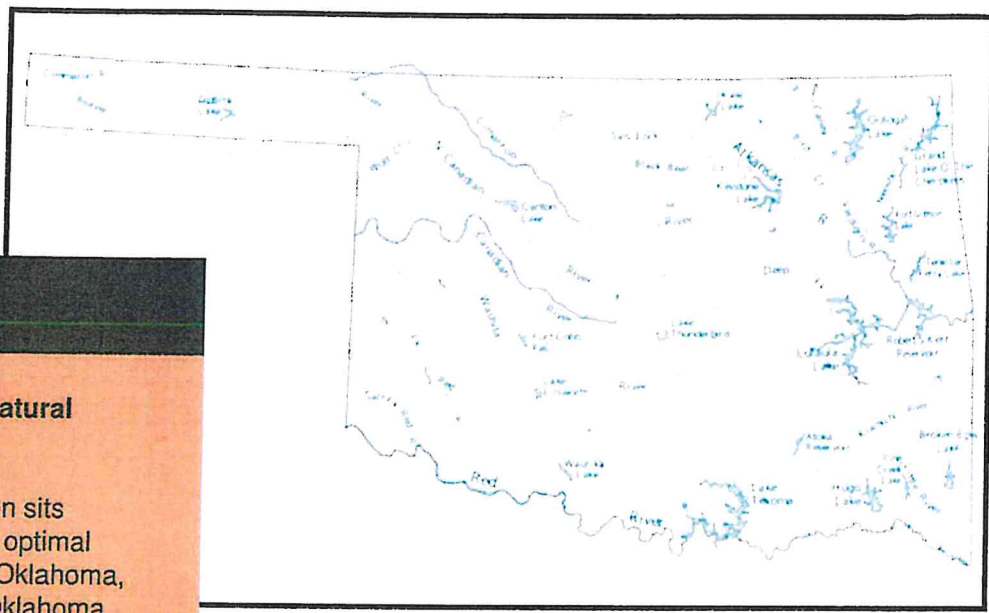


Figure 1: Oklahoma Lakes and Rivers Map, GISGeography

Geography and Natural Resources

The COEDD Region sits in a geographically optimal location in Central Oklahoma, situated between Oklahoma City and Tulsa, and within the Midwest United States. With 2,267 bridges, access to U.S. Interstates and Highways, 222 route miles of freight railroad, and over 3 billion Person Trips through the region in 2020, the region has a wealth of infrastructure. (<https://www.bts.gov/ctp>)

Additionally, the region has several rivers running through the area, bringing in fresh water and goods. While the land in the region has historically not been known for cultivation, farming is present in the region along with other forms of agriculture.

The region is home to an abundance of Native American tribes, including the Citizen Potawatomi Nation, Kickapoo, Sac and Fox, Pawnee, Creek, Seminole, Choctaw, and Otoe-Missouria. Not only do the tribes represent the rich history of the area, but they also strongly represent the population in the region and are a vital part of the region's economy.

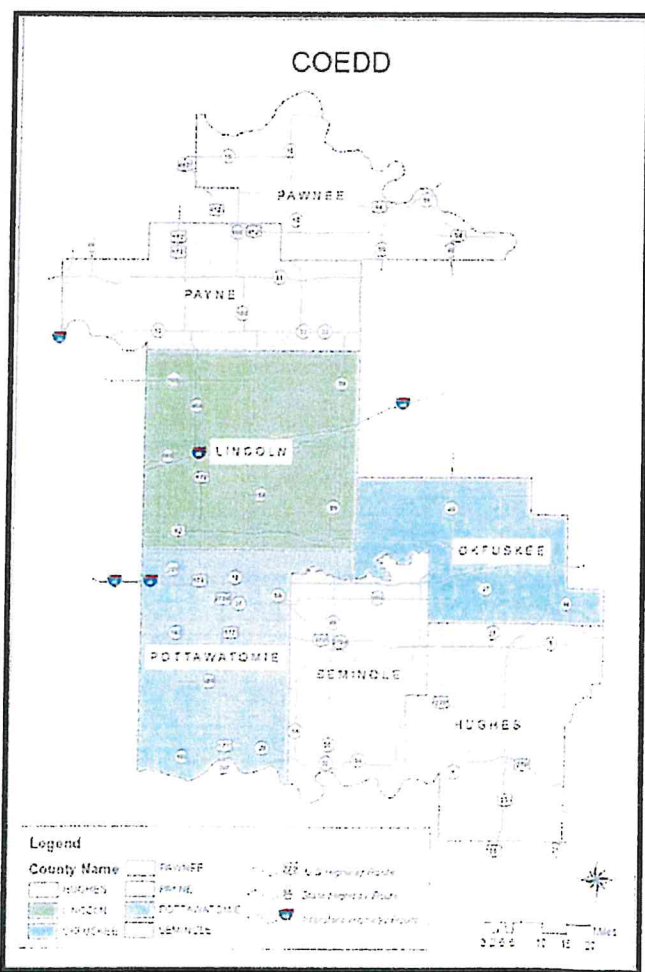


Figure 2: COEDD County Map, COEDD

Economic Indicators

The COEDD Region has a growing population, with low unemployment and an increasingly more educated and diverse workforce. Several industries are experiencing significant growth, while over half of the top ten fastest growing occupations pay above the median hourly wage. That said, poverty rates in the region remain above average and median and per capita income fall well below state averages.

Population

Over the past five years, the population in the COEDD region has remained relatively steady, increasing just 0.7% from 2015 to 2020. A main reason for this increase in growth is due the jump in population from 2019 to 2020, where the region gained roughly 2,000 people. With that said, the population is expected to increase 3.0% over 2020 to 2025, growing an additional 7,839 people. This increase in growth is a positive sign for the region, as many counties, especially many rural counties in Oklahoma and around the country, are seeing, and expected to see population declines.

Historic and Projected Population of COEDD Region (2015-2025)

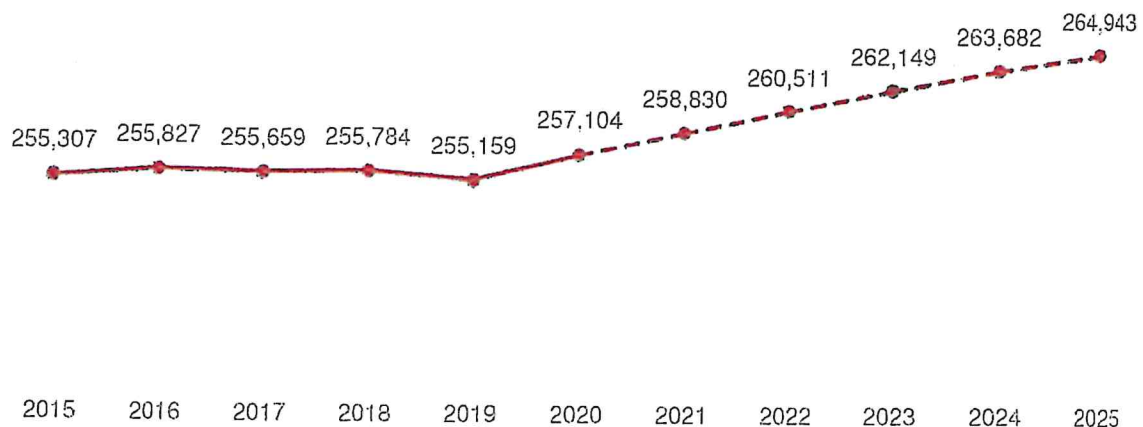


Figure 3: Population Projections, US Census Bureau, 2019 ACS 5-Year Estimates

For the year 2020, the COEDD population represents roughly 6.5% of the Oklahoma population. As previously mentioned, the COEDD Region grew 0.7% in the past five years, growing roughly 1% slower than the state during this time span. That said, the region is expected to outperform the state in the next five years, as the expected increase in population is 3.05% (7,839 people), about 1.2% higher than Oklahoma's growth of 1.87% (74,535 people).

Payne County is the largest county in the region, representing 32.3% of the total population. Payne County also saw the largest increase in people that last five years (1,725) and is projected to see the largest growth in the next five years with 5,435 people (7% increase). Payne and Pottawatomie County make up over 60% of the total population in the region and contribute to a majority (over 90%) of the future projected population growth. Four counties lost population over the last five years, with Seminole County projected to be the only county in the next five years that is expected to continue to see declines.

Table 1: Population Comparison, US Census Bureau, 2019 ACS 5-Year Estimates

Area	2020 Population	Change (2015-2020)		Projected Change (2020-2025)	
COEDD Region	257,104	1,797	0.7%	7,839	3.05%
State (Oklahoma)	3,997,343	67,834	1.74%	74,535	1.87%
United States	330,591,441	9,956,278	3.11%	11,172,877	3.38%

Historic and Projected Population by County (2015-2020-2025)

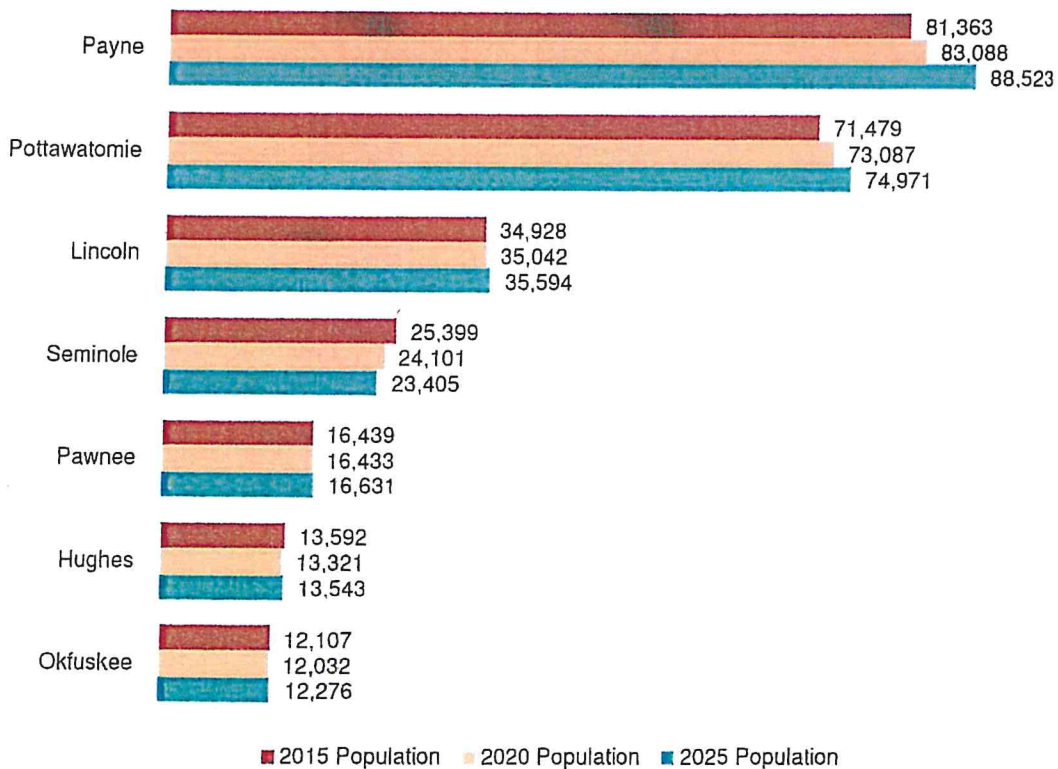


Figure 4: Population by County, US Census Bureau, 2019 ACS 5-Year Estimates

Labor Force

The COEDD Region's 2020 labor force consists of 113,132 people. The labor force has been slowly declining since 2016, consistent with national trends. That said, employment has remained relatively steady before dipping dramatically in 2020 due to the COVID-19 pandemic. The slow decline in labor force could be contributed to many factors, including an aging population.

Labor Force and Employed in COEDD Region (2010-2021 Annual Averages)

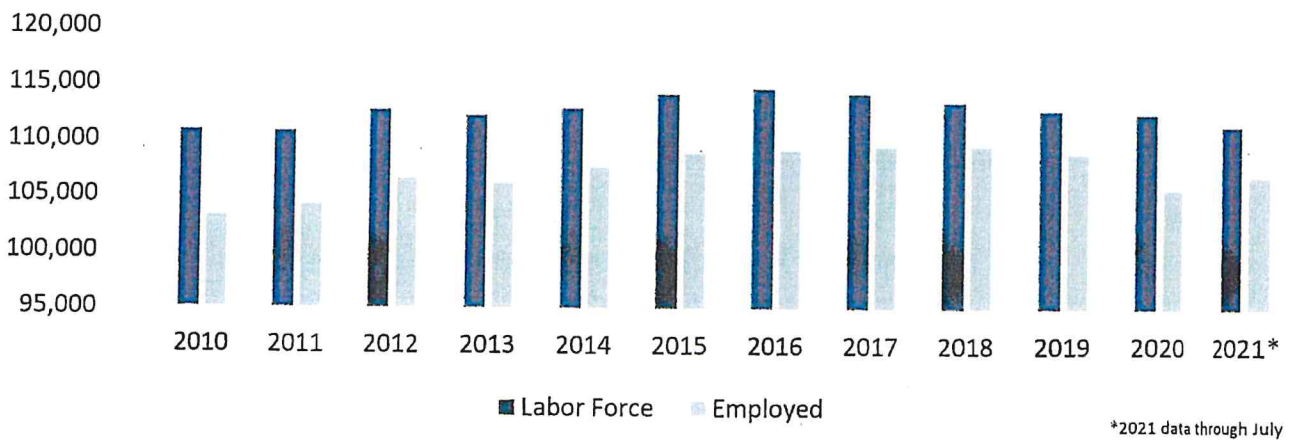
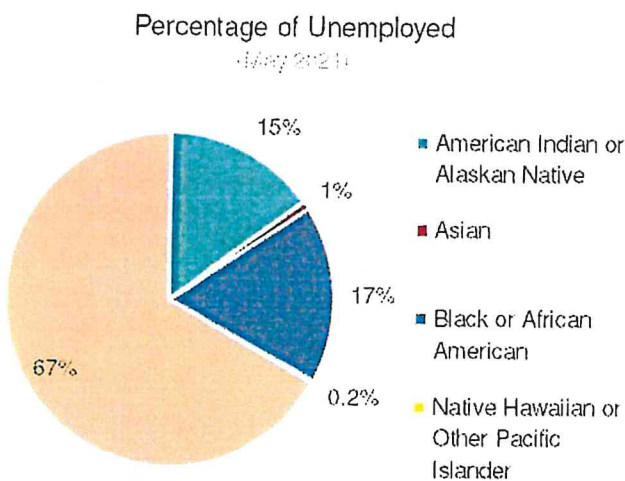


Figure 5: Labor Force and Employment, US Bureau of Labor Statistics



Race	Unemployment (May 2021)
American Indian or Alaskan Native	604
Asian	33
Black or African American	688
Native Hawaiian or Other Pacific Islander	8
White	2,697
Total	4,031

Figure 6: Unemployment by Race, Emsi 2021.2

Unemployment

Unemployment in the COEDD Region has closely followed the state trendline in the last 5 years. Both the COEDD Region and the state were not as heavily impacted by the COVID-19 Pandemic in terms of unemployment, as both areas had roughly 2% lower unemployment in 2020 than the national average. Additionally, the region has steadily recovered from the pandemic as rates are now back to pre-pandemic levels. Both the region and state have recovered quicker than the nation in terms of unemployment, as unemployment is still much higher in the country now than it was before COVID-19.

While only accounting for 4% of the population, Black or African Americans are unproportionally unemployed with 17% of the overall total unemployed workers. That said, those who identify as white make up much of the overall percentage of unemployed people at 67%.

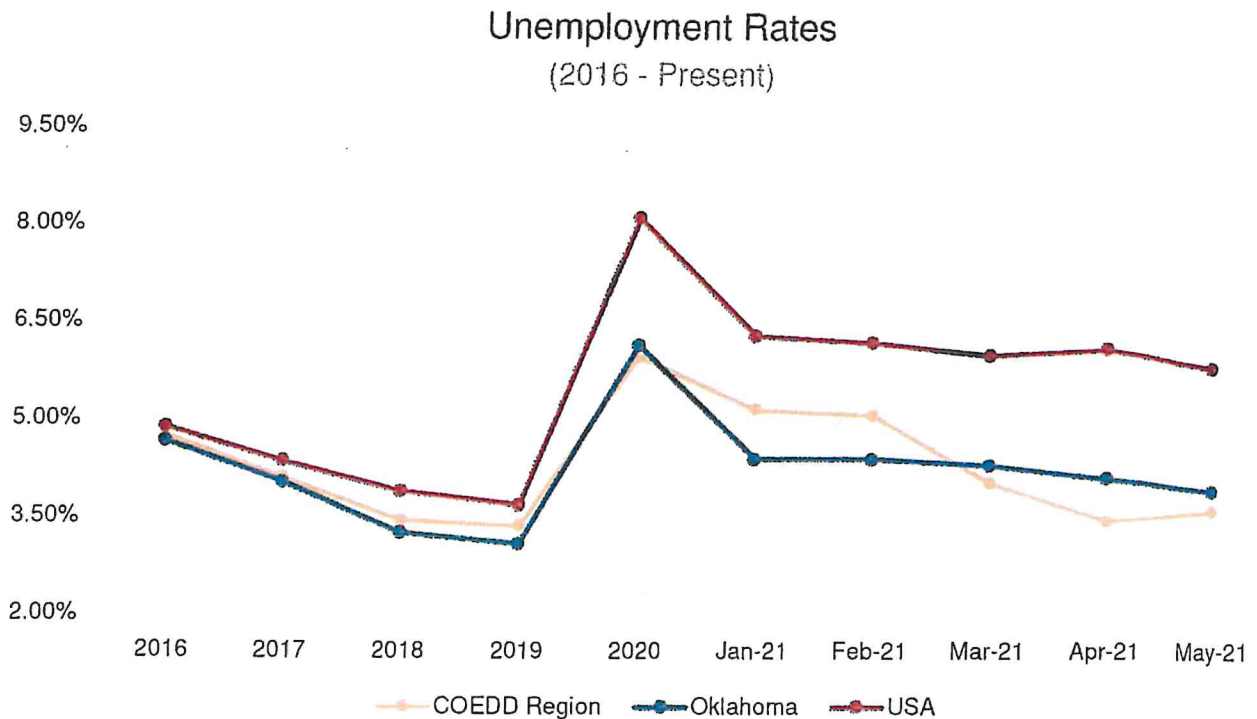


Figure 7: Unemployment Percentages, US Bureau of Labor Statistics

Regional Poverty and Income

The COEDD Region has a 4% higher poverty rate than the state of Oklahoma, while also having roughly \$10,000 less Median Household Income (MHI) and \$7,000 less per capita income. Payne County has the highest poverty rate in the region at 26%, while Lincoln County has the lowest at 14%. Pottawatomie County has the highest MHI and Per Capita Income in the region, while Okfuskee County has the lowest in both categories.

Table 2: Poverty and Income, US Census Bureau, 2019 5-Year ACS Estimates

Area	Poverty Rate	Median Household Income	Per Capita Income
Payne County	26.0%	\$41,272	\$22,405
Pawnee County	23.3%	\$48,009	\$24,303
Hughes County	20.7%	\$39,365	\$20,572
Seminole County	20.4%	\$39,373	\$20,666
Okfuskee County	15.9%	\$38,411	\$18,437
Pottawatomie County	14.1%	\$53,511	\$26,207
Lincoln County	13.9%	\$50,671	\$25,255
COEDD Region	19.2%	\$44,373	\$22,549
Oklahoma	15.2%	\$54,449	\$29,666

While having the third lowest county poverty rate, Okfuskee County has the highest poverty rate for children that are under 18. Hughes County has the second highest rate of all counties in the region, followed by Seminole. The percent of children under 18 who are considered in poverty for each county is considerably higher than the total poverty rates for each county.

% Children Under 18 Poverty Level in COEDD Region

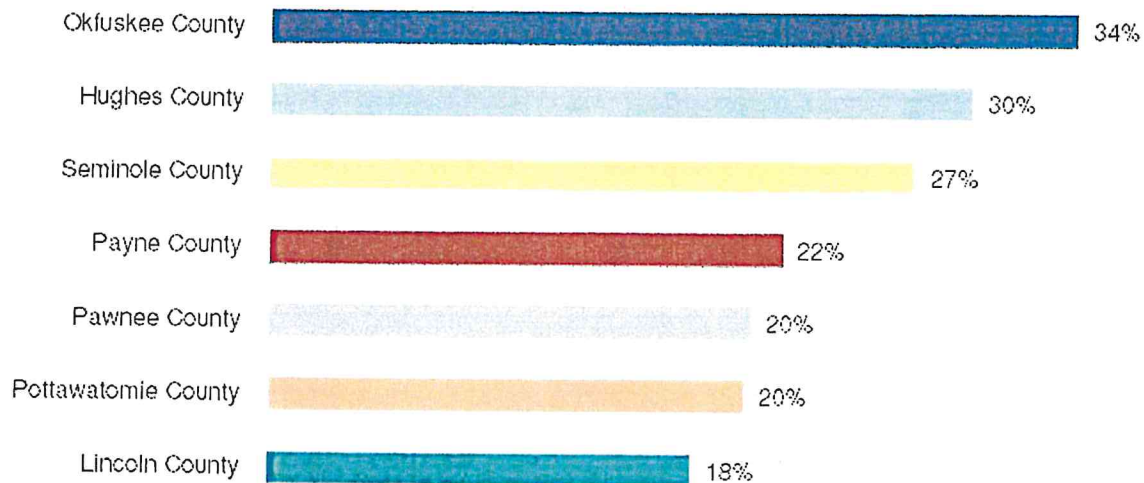


Figure 8: Child Poverty Percentages, US Census Bureau, 2019 5-Year ACS Estimates

Educational Attainment

In the COEDD Region, 88.4% of people have attained at least a high school diploma. This is slightly above both the State and National average. That said, the region lags behind both the state and national average for population attaining an Associate's, Bachelor's, and Graduate Degree or Higher. The COEDD region's education attainment numbers run closely with state averages. The largest gap in attainment for the region is Bachelor's Degrees, where the state attainment average is 3% higher than the regions.

The population in the region has become more educated in the last 20 years, as each education level above High School Diploma saw increases in terms of percent of population. Specifically, Some College (2% increase), Associate Degree (3% increase), Bachelor's Degree (3% increase), and Graduate Degree or Higher (1% increase) all are education levels in 2020 that have higher percent of population attainment than in 2001.

Educational Attainment
(Year 2020 - % of Population)

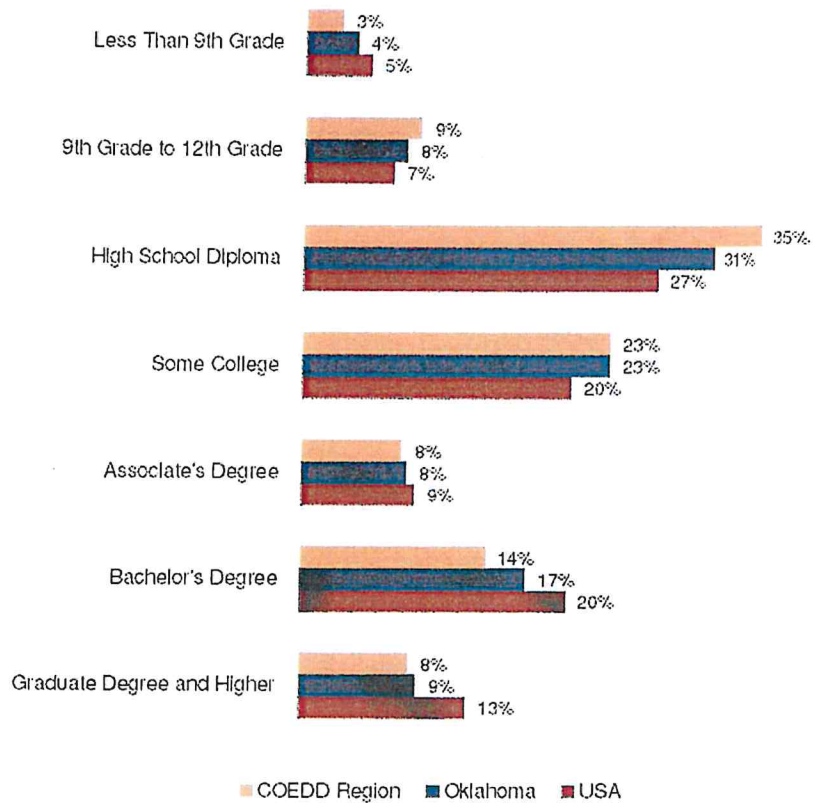


Figure 9: Educational Attainment, US Census Bureau, 2019 5-Year ACS Estimates

Education Level in COEDD Region
(2001 vs. 2020)

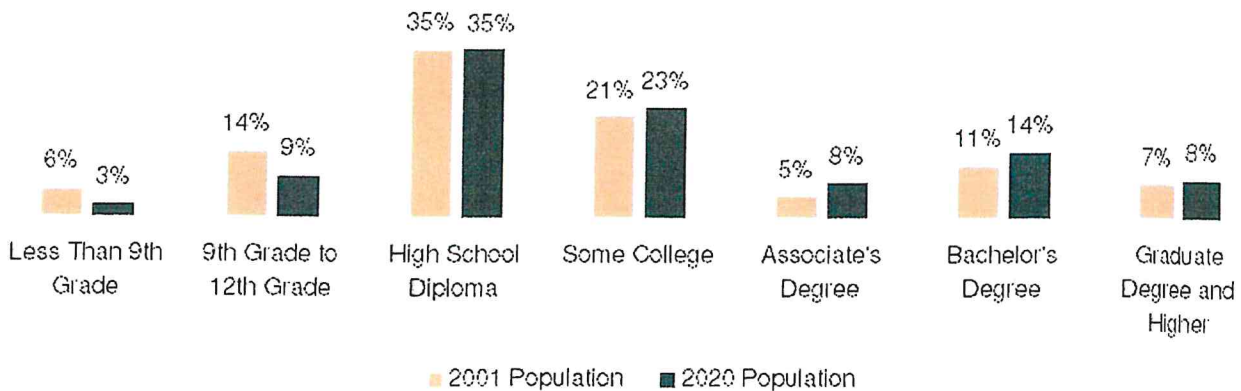


Figure 10: Educational Attainment Year Comparison, Emsi 2021.2

Race and Ethnicity

Most residents within the COEDD Region (73%) are White. That said, the region is expected to become more diverse in the coming years with the increase in population of many different races. American Indian or Alaskan Native is the second largest race represented and is projected see an increase of roughly 1,200 people in the next five years. The Two or More Races subset is projected to see the largest increase of 2,160 people over this same time span. Overall, each minority race/ethnicity is projected to see a larger increase in people over the next five years, than they had seen in the previous five.

Table 3: Race and Ethnicity Data, Emsi 2021.2

Race/Ethnicity	2020 Population	% Of Cohort	Change (2015-2020)		Projected Change (2020-2025)	
White	187,557	72.95%	(1,672)	(0.88%)	1,883	1.00%
American Indian or Alaskan Native	27,401	10.66%	571	2.13%	1,215	4.43%
Black	8,661	3.37%	88	1.03%	377	4.35%
Asian	4,710	1.83%	(13)	(0.27%)	608	12.90%
Native Hawaiian or Pacific Islander	267	0.10%	65	32.18%	156	58.52%
Hispanic	8,801	3.42%	871	0%	1,439	16.36%
Two or More Races	19,706	7.66%	1,886	10.58%	2,160	10.96%
Total	257,104	100.00%	1,797	0.70%	7,839	3.05%

2020 COEDD Region Population by Race/Ethnicity

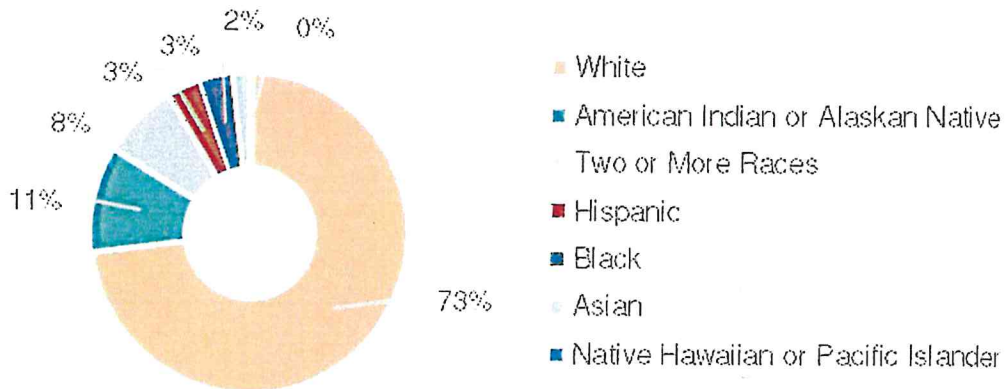


Figure 11: Race and Ethnicity Data, 2021.2

Commuting

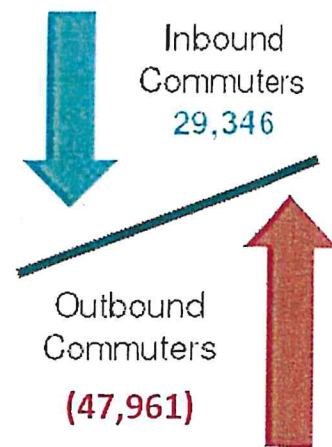
Commuting patterns in the COEDD Region indicate that the region has several more outbound commuter workers than inbound commuters. The close proximity to both large metropolitan areas of Oklahoma City and Tulsa, is a major underlying factor for outbound commuting. From the years 2015-2019, both inbound and outbound commuters were slowly increasing, with outbound commuters increasing at a higher rate. However, for the year 2020, both inbound and outbound commuters dropped significantly. The decrease in commuters for 2020 could be in part explained by many employers using new work-from-home (WFH) and remote working tactics, as the COVID-19 pandemic has caused employers around the entire country to rethink what the typical workplace looks like.

Table 4: Commuting Patterns, Emsi 2021.2

Year	Inbound	Outbound	Net
2015	29,105	46,568	(17,464)
2016	29,198	46,181	(16,983)
2017	29,889	47,418	(17,520)
2018	29,889	48,702	(18,814)
2019	30,256	49,427	(19,171)
2020	29,346	47,961	(18,615)

Migration

Migration is a crucial part of any community and its economy. As people come and go, what resources and attributes flow in and out of the region can change the future and outlook of the area. As for net migration, smaller counties around the region have brought in more people than they have received, while counties for net negative migration are larger counties with major cities near the COEDD region.



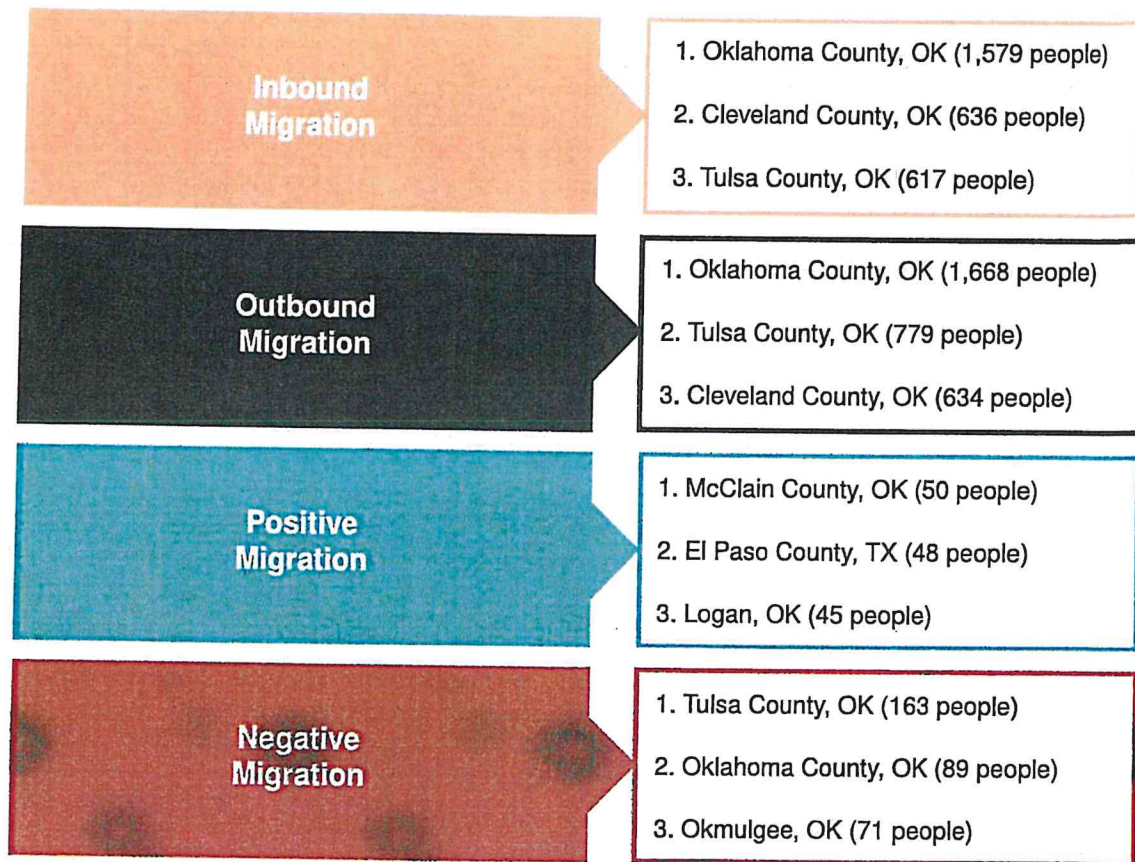


Figure 12: Migration Patterns, Emsi 2021.2

5-Year Migration Data for COEDD Region

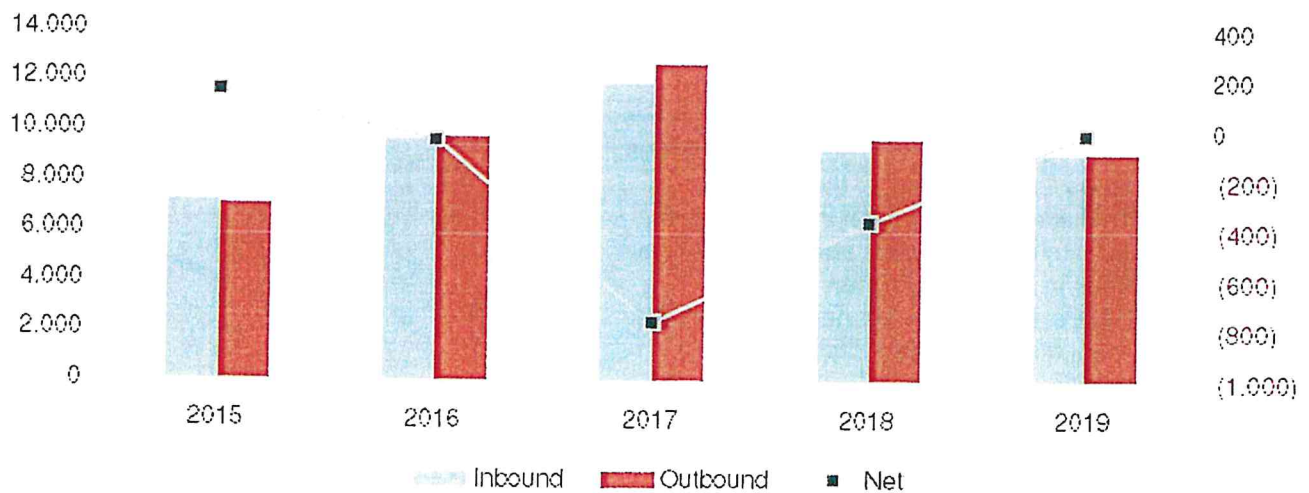


Figure 13: 5-Year Migration Patterns, Emsi 2021.2

Community Indicators

Community indicators for the entire COEDD region include Millennial Population, Retirement Risk, Racial Diversity, Veteran Population, and Violent/Property Crime statistics. As seen, millennial representation in the region is just below the national average, as 47,524 millennials (ages 25-39) live in the area, compared to the national average of 52,610 for an area of COEDD's size. Retirement risk is also about average in the region. The national average for an area of COEDD's size is 75,020 people 55 or older, compared to 72,524 that live in the region. Racial diversity on the other hand, is low in the region, as the national average for an area of COEDD's size is 101,779 racially diverse people, while there are 68,225, more than 30,000 people less in the region.

Veterans are well represented in the region, as 16,358 veterans are in the area, higher than the national average of 14,171. Finally, violent crime in COEDD is lower than the national average of 3.53 violent crimes per 1,000 people, while property crime at 23.48 is higher than the national average of 19.79 property crimes per 1,000 people.



Figure 14: Community Indicators, Emsi 2021.2

Industry Overview

In the COEDD Region, the Government industry is by far the largest industry in the region, as almost 30,000 jobs fall within this sector. The Retail Trade, Accommodation and Food Services, and Health Care and Social Assistance are the next highest industries in terms of 2020 jobs. The Utilities sector has the highest annual earnings in the region at nearly \$80,000. The Transportation and Warehousing sector, as well as the Mining Quarrying, and Oil and Gas Extraction sector, have the next two highest average annual earnings with both around \$60,000. Location Quotient (LQ) is a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. As seen, the Mining, Quarrying, and Oil and Gas Extraction Industry Sector jobs are highly concentrated in the region. Other sectors with higher concentrations include Government, Utilities, Accommodation and Food Services, and Retail Trade.

Top Industries by total 2020 Jobs



Figure 15: Top Industry Jobs, Emsi 2021.2

Top industries by 2020 Avg. Annual Earnings



Figure 16: Top Industry Earnings, Emsi 2021.2

Top Industries by Location Quotient

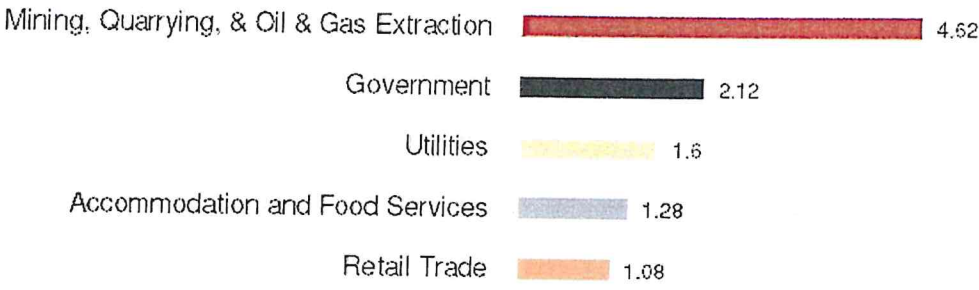


Figure 17: Top Industry Location Quotient, Emsi 2021.2

Occupation Overview

Five of the top occupations in the region had more than 5,600 jobs in 2020, with the top two occupations having more than 10,000 jobs each. The top five occupations include Office and Administrative Support Occupations (11,492), Food Preparation and Serving Related Occupations (10,328), Educational Instruction and Library Occupations (8,725), Sales and Related Occupations (8,314), and Healthcare Practitioners and Technical Operations (5,606).

Top Occupations by total 2020 Jobs

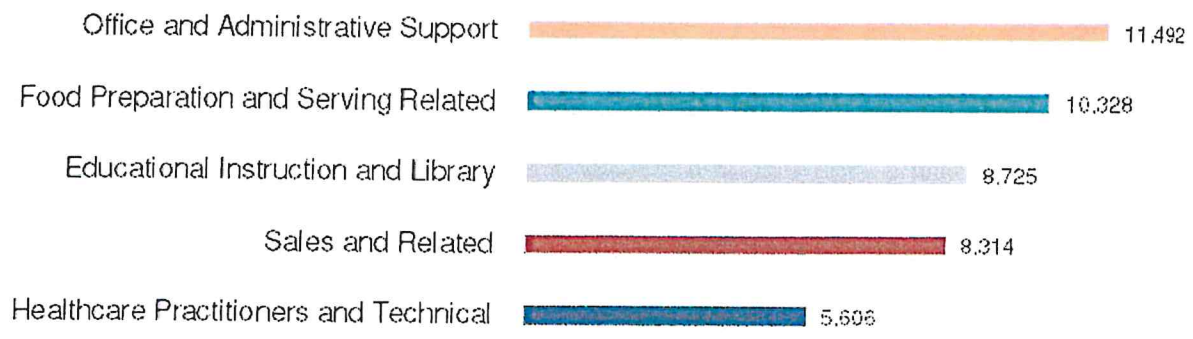


Figure 18: Top Occupation Jobs, Emsi 2021.2

Of the 500 occupations examined in the region, 42% required a high school diploma or equivalent, 31% required a bachelor's degree or higher, and 14% of occupations required no education at all. Additionally, roughly 40% of occupations do not require any on-the-job (OTJ) training, while 57% of jobs require some sort of short-term/moderate/long-term OTJ training. Only 3% of jobs required an internship/residency and just 2% of jobs required apprenticeships.

Top 500 Occupations Typical Entry Level Education

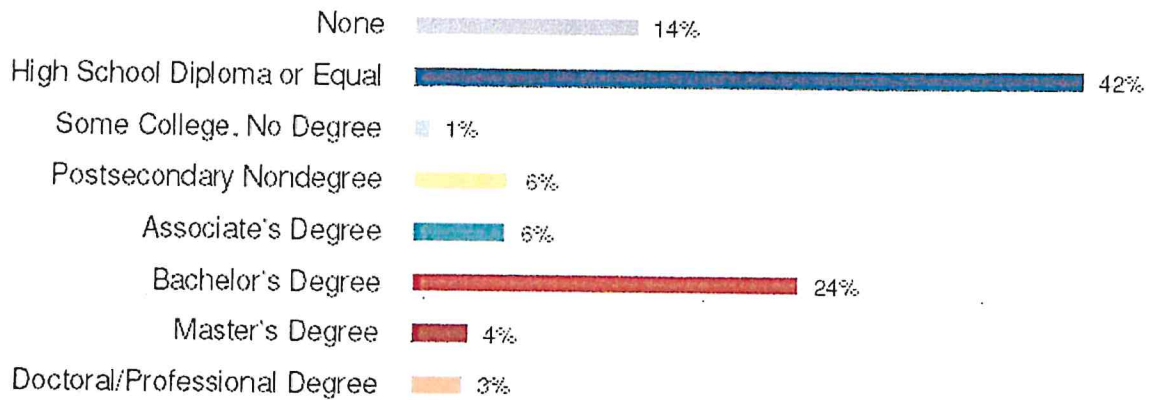


Figure 19: Top Occupation Education Characteristics, Emsi 2021.2

Top 500 Occupations Typical On-The-Job-Training

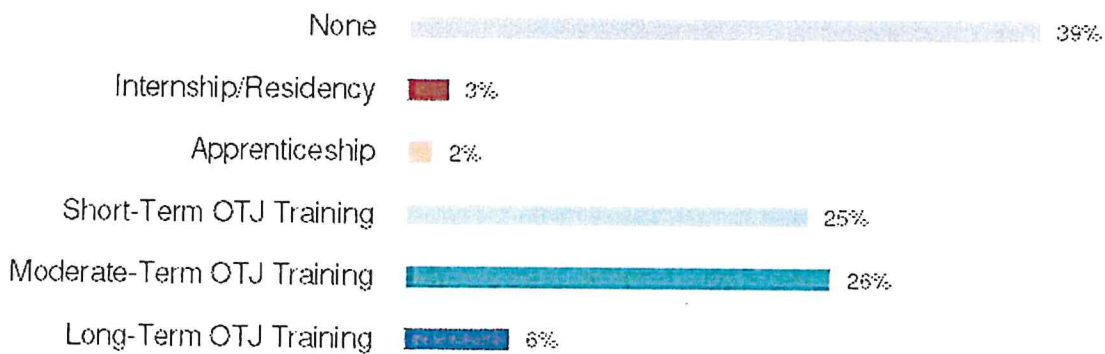


Figure 20: Top Occupation OTJ Training Characteristics, Emsi 2021.2



Target Sectors

The COEDD Region has a diverse economy with significant concentrations in a few key industries. In the region, the primary drivers are an impressive supply of a well-educated workforce and a strong partnership between education, government and industry.

Along with community stakeholder input and quantitative data analysis, three industries were chosen that deserved special attention as they are critical for the future economic success of the region. These industries include:

Oil & Gas

Retail Trade

Tourism





Target Sector: Oil & Gas

The region is in high supply of jobs for this specific industry when compared to a national scale*, employing over 1,500 people. The COEDD region employs roughly 1,200 more people in the Mining, Quarrying, and Oil and Gas Industry than a typical region of its size. Earnings per jobs is determined by using the total industry earnings divided by the number of jobs in the industry. That said, the earnings per job for this industry are well below the national average. The average salary for a job in this industry in the COEDD region is \$67,283, roughly \$60,000 less than the national average of \$129,710. Demand for the industry is defined by the total amount of job postings in the region. There are 5 job postings a month, 2 higher than the national average of 3 per month. With the high supply of jobs in the region, it should be expected that job postings in the region outpace the national average.

Aggressive Hiring Competition Over a Deep Supply of Regional Talent



*National average values are derived by taking the national value for Mining, Quarrying, and Oil and Gas Extraction and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region.

Figure 21: Oil and Gas Industry Characteristics, Emsi 2021.2

Oil & Gas Industry Breakdown

The Mining, Quarrying, and Oil and Gas Extraction industry has seen a deep decline in jobs the past five years and is projected for further decreases. In the last five years, 985 jobs were lost, indicating a 39% overall decline in jobs for the region. In the next five years, jobs are projected to decline by 293, indicating a 19% decline. That said, while jobs declined over the past five years, the COVID-19 pandemic had a significant impact on the outlook for the industry. From 2016-2019, jobs were slowly increasing but still not back to 2015 levels, short 191 jobs. From 2019 to 2020, 794 jobs were lost (a 34% decrease of jobs for the entire industry). This drop for the Mining, Quarrying, and Oil and Gas industry was the largest decline in jobs out of any industry from 2019-2020 in the region. Overall, while the region, state, and nation saw declines in jobs for this industry, the COVID-19 pandemic inflated the apparent decline as 80% of all jobs lost in the past five years happened over the 2019-2020 timeframe. Additionally, average earnings for jobs in the industry varied between counties, ranging from approximately \$56,000-\$78,000. Location Quotient's (LQ) were significantly high for each county and the entire region, with Seminole County having the highest LQ of 12.44 and an overall region average of 7.02.

Table 5: Regional Industry Job Numbers, Emsi 2021.2

Region	2020 Jobs	Change (2015-2020)		Change (2020-2025)		Average Earnings	Payrolled Business Locations	LQ
Payne County	472	(460)	(49%)	(143)	(30%)	\$70,056	65	3.25
Seminole County	368	(140)	(28%)	(145)	(39%)	\$69,873	43	12.44
Lincoln County	227	(34)	(13%)	12	5%	\$58,030	23	7.37
Pottawatomie County	185	(223)	(55%)	(10)	(6%)	\$77,787	31	1.96
Pawnee County	137	(24)	(15%)	(15)	(11%)	\$56,165	23	9.23
Hughes County	98	(128)	(57%)	(36)	(37%)	\$57,590	14	7.15
Okfuskee County	82	25	44%	44	54%	\$71,826	8	7.75
Total	1,569	(985)	(39%)	(293)	(19%)	\$65,904	207	7.02



Target Sector: Oil & Gas

Oil & Gas Unemployment

After peaking in early 2015, unemployment has been steadily declining and has remained relatively low for the industry. In 2019 unemployment began to slowly rise until April 2020 and has consistently declined since then. Each county followed a similar unemployment trendline and current have less unemployed workers than in January 2020.

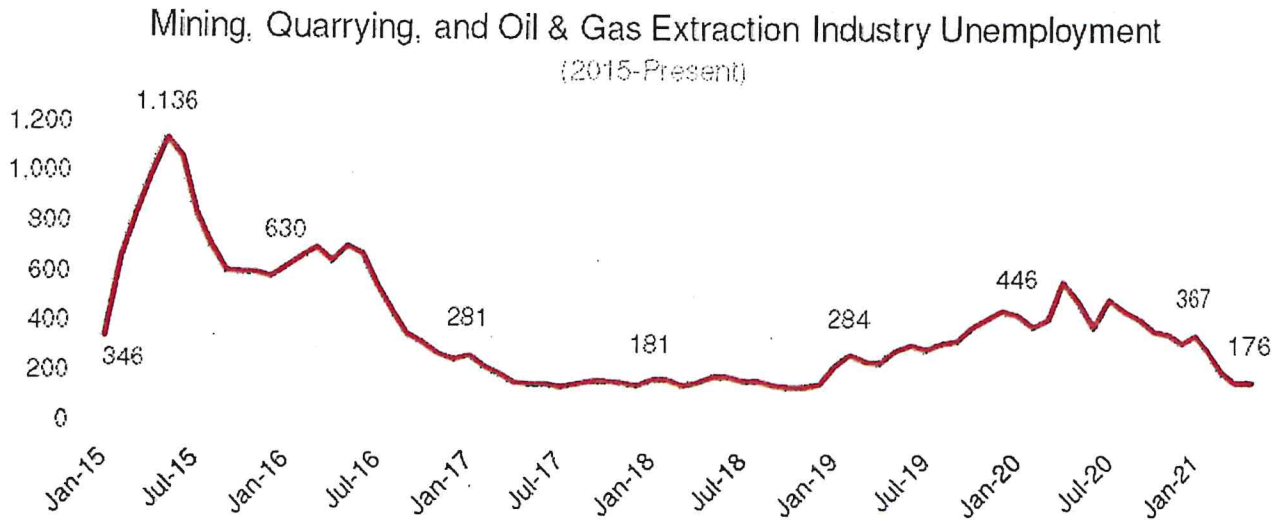


Figure 22: Oil and Gas Industry Unemployment, Emsi 2021.2

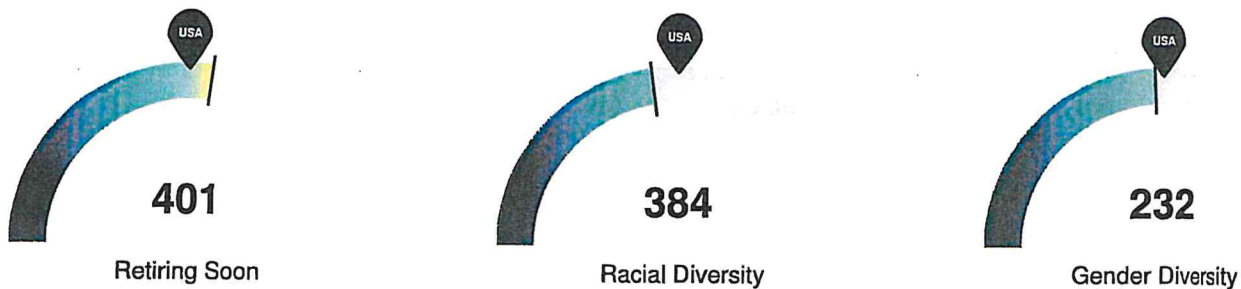


Target Sector: Oil & Gas

Oil & Gas Workforce Characteristics

Workforce characteristics of the industry include retirement risk, racial diversity, and gender diversity. Retirement risk is high in the COEDD region for the Mining, Quarrying, and Oil and Gas Industry. The national average for employees who are 55 or older for an area of the COEDD regions size is 354 employees, while the COEDD region is above this number with 401 employees. The high supply of jobs in the region could impact these numbers. Additionally, racial diversity is low in the area compared to the national average. For an area of COEDD's size, the national average is 448 racially diverse employees, compared to the 384 that are current in the industry. Finally, gender diversity is about average within the region, as 232 female employees work within the industry in the COEDD region compared to the national average of 242.

Retirement Risk is High, While Overall Diversity is About Average



*National average values are derived by taking the national value for Mining, Quarrying, and Oil and Gas Extraction and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region.

Figure 23: Oil and Gas Industry Characteristics, Emsi 2021.2



Target Sector: Oil & Gas



Target Sector: Retail Trade

The Retail Trade industry in the region has about average supply of jobs when compared to a national scale*, employing 9,643 people. The COEDD region employs roughly 700 people less in the Retail Trade industry than a typical region of its size. Earnings per jobs is determined by using the total industry earnings divided by the number of jobs in the industry. That said, the earnings per job for this industry are below the national average. The average salary for a job in this industry in the COEDD region is \$33,131, roughly \$9,000 less than the national average of \$42,413. Demand is high for this industry in the region, as it is defined by the total amount of job postings in the region. There are 373 job postings a month, about 60 higher than the national average of 311 per month.

Aggressive Hiring Competition Over an Average Supply of Regional Talent



*National average values are derived by taking the national value for Retail Trade and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region. In other words, the values represent the national average adjusted for region size.

Figure 24: Retail Trade Industry Characteristics, Emsi 2021.2

Retail Trade Industry Breakdown

The Retail Trade industry saw deep decline in jobs over the past five years. That said, the industry looks to rebound in the next five years with all but one county having positive projected growth. In the last five years, 553 jobs were lost, indicating a 5% overall decline in jobs for the region. While 553 jobs were lost in the last five years, 30% of this total were lost over 2019-2020 during the COVID-19 pandemic. In the next five years, jobs are projected to increase by 213, indicating a 2% increase. Every county in the region other than Lincoln saw declines in jobs the last five years, with Payne County seeing the largest decrease in jobs (293), and Hughes County seeing the largest percent change (-16%). Average earnings for jobs in the industry varied between counties, ranging from approximately \$29,000-\$40,000. Location Quotient's (LQ) were consistently high for each county and the entire region, with Lincoln County having the highest LQ of 1.17 and an overall region average of 1.05.

Table 6: Retail Trade Industry Jobs, Emsi 2021.2

Region	2020 Jobs	Change (2015-2020)		Change (2020-2025)		Average Earnings	Payrolled Business Locations	LQ
Payne County	4,120	(293)	(7%)	81	2%	\$32,476	289	1.07
Pottawatomie County	2,741	(69)	(2%)	8	0%	\$32,712	228	1.10
Lincoln County	949	54	6%	111	12%	\$36,237	89	1.17
Seminole County	790	(139)	(15%)	(17)	(2%)	\$34,466	63	1.01
Pawnee County	431	(33)	(7%)	17	4%	\$39,935	38	1.10
Hughes County	365	(69)	(16%)	1	0%	\$27,659	40	1.01
Okfuskee	246	(4)	(2%)	12	5%	\$28,716	31	0.88
Total	9,643	(553)	(5%)	213	2%	\$33,171	777	1.05



Target Sector: Retail Trade

Retail Trade Unemployment

The Retail Trade industry was undoubtedly impacted by the COVID-19 pandemic. After remaining relatively steady from 2015-2019, unemployment drastically spiked in April of 2020. After hitting nearly 1,800 unemployed workers (an increase of 1,336 workers from March 2020 to April 2020), unemployment began to decrease and has continued to decrease until today where it is close to pre-pandemic numbers.

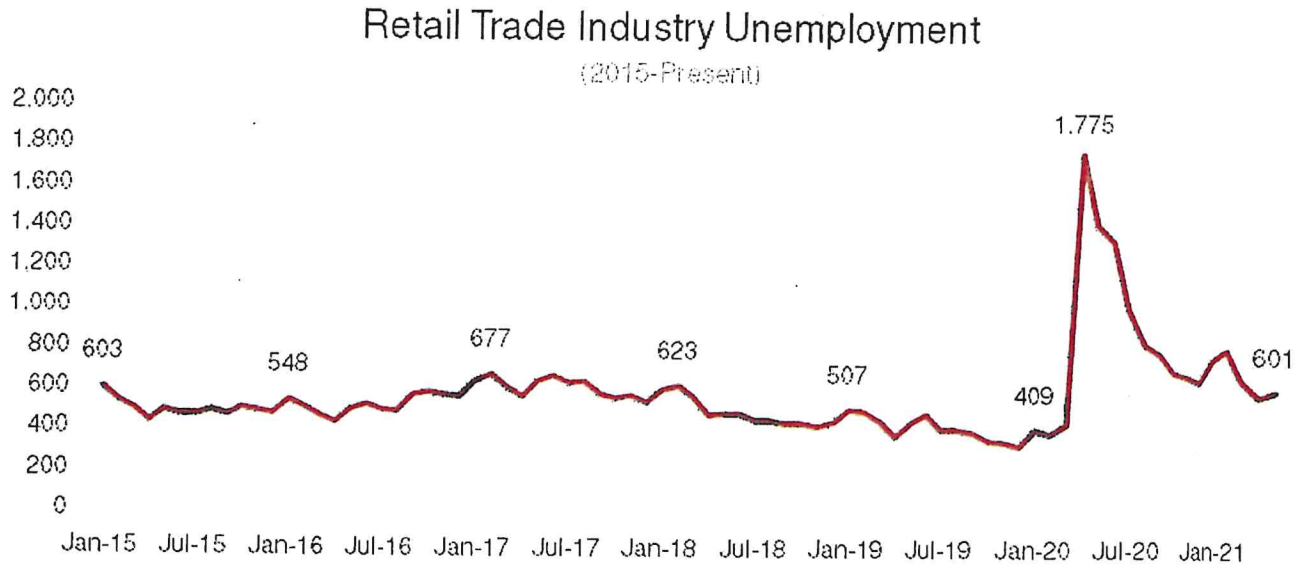


Figure 25: Retail Trade Industry Unemployment, Emsi 2021.2

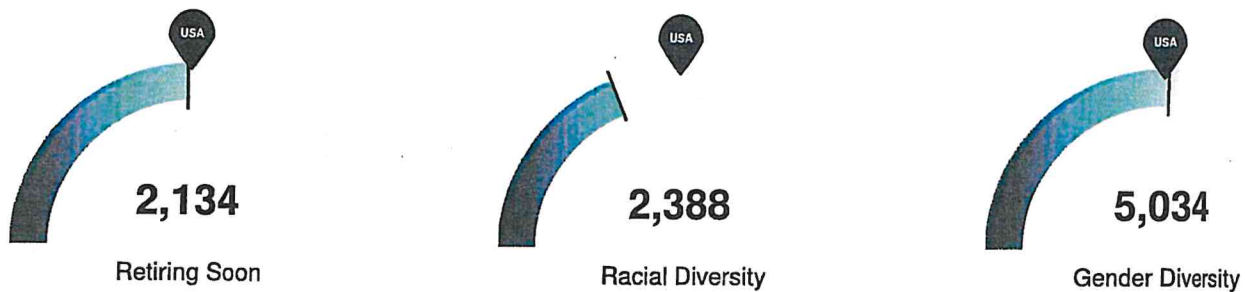


Target Sector: Retail Trade

Retail Trade Workforce Characteristics

Industry workforce characteristics include retirement risk, racial diversity, and gender diversity. Retirement risk is low in the COEDD region for the Retail Trade industry. The national average for employees who are 55 or older for a region of COEDD's size is 179 people, while the COEDD region is below this number with 147 people. Additionally, racial diversity is low in the area compared to the national average. For an area of COEDD's size, the national average is 229 racially diverse employees, compared to 146 people that are current in the industry. Finally, gender diversity is about average within the region, as 386 female employees work within the industry in the COEDD region compared to the national average of 3.

Retirement Risk is About Average, While Overall Diversity is Low



*National average values are derived by taking the national value for Retail Trade and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region. In other words, the values represent the national average adjusted for region size.

Figure 26: Retail Trade Industry Characteristics, Emsi 2021.2



Target Sector: Retail Trade



Target Sector: Tourism

For this analysis of regional tourism, we examine the NAICS 2-digit Industry level for both Arts, Entertainment, & Recreation (page 30) as well as Accommodation & Food Services ([page 34](#)).

Arts, Entertainment, & Recreation

The Arts, Entertainment, and Recreation industry has a low supply of jobs in the region when compared to a national scale*, employing 794 people. The COEDD region employs roughly 600 people less in this industry than a typical region of its size. Earnings per jobs is determined by using the total industry earnings divided by the number of jobs in the industry. That said, the earnings per job for this industry are below the national average*. The average salary for a job in this industry in the COEDD region is \$24,700 roughly \$25,000 less than the national average of \$49,438. Demand is low for this industry, as it is defined by the total amount of job postings in the region. There are 8 job postings a month in the COEDD region for this industry, 5 lower than the national average of 13 per month.

Light Hiring Competition Over a Thin Supply of Regional Talent



*National average values are derived by taking the national value for Arts, Entertainment, and Recreation and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region. In other words, the values represent the national average adjusted for region size.

Figure 27: Arts, Entertainment, and Recreation Industry Characteristics, Emsi 2021.2

Arts, Entertainment, & Recreation Industry Breakdown

The Arts, Entertainment, and Recreation industry saw increases in jobs over the past five years for each county except for Seminole. Additionally, Okfuskee, Hughes, and Pawnee County had insufficient data to be displayed. That said, the industry looks to continue to grow in the next five years with all counties having positive growth in terms of numbers of jobs. In the last five years, 179 jobs were added to the industry, indicating a 37% overall increase in jobs for the region. In the next five years, jobs are projected to increase by 168, indicating a 21% increase. Average earnings for jobs in the industry varied between counties, ranging from approximately \$19,000-\$36,000. Location Quotient's (LQ) were consistently low for each county and the entire region, indicating the region is not highly concentrated with jobs for this industry.

Table 7: Arts, Entertainment, and Recreation Industry Jobs, Emsi 2021.2

Region	2020 Jobs	Change (2015-2020)		Change (2020-2025)		Average Earnings	Payrolled Business Locations	LQ
		Jobs	%	Jobs	%			
Payne County	425	66	18%	60	14%	\$24,835	29	0.72
Pottawatomie County	225	103	85%	81	36%	\$19,278	16	0.58
Lincoln County	43	10	29%	5	12%	\$35,814	3	0.34
Seminole County	36	(11)	(23%)	8	21%	\$32,020	5	0.30
Okfuskee County	28	Insf. Data	Insf. Data	1	5%	\$29,887	1	0.66
Hughes County	27	Insf. Data	Insf. Data	14	51%	\$34,419	2	0.48
Pawnee County	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	\$25,953	1	0.16
Total	784	168	37%	168	21%	\$28,887	57	0.46



Target Sector: Tourism

Arts, Entertainment, & Recreation Unemployment

After remaining relatively steady from 2015-2019, unemployment drastically spiked in April of 2020 due to the COVID-19 pandemic. After hitting nearly 435 unemployed workers, unemployment began to decrease and has continued to decrease until today where it is close to pre-pandemic numbers. Payne County experienced the highest number of unemployed workers at the start of the pandemic, followed by Pottawatomie County. The two together both made up a majority of all unemployed workers (all other counties had insufficient unemployment data to show).

Arts, Entertainment, and Recreation Industry Unemployment
(2015-Present)

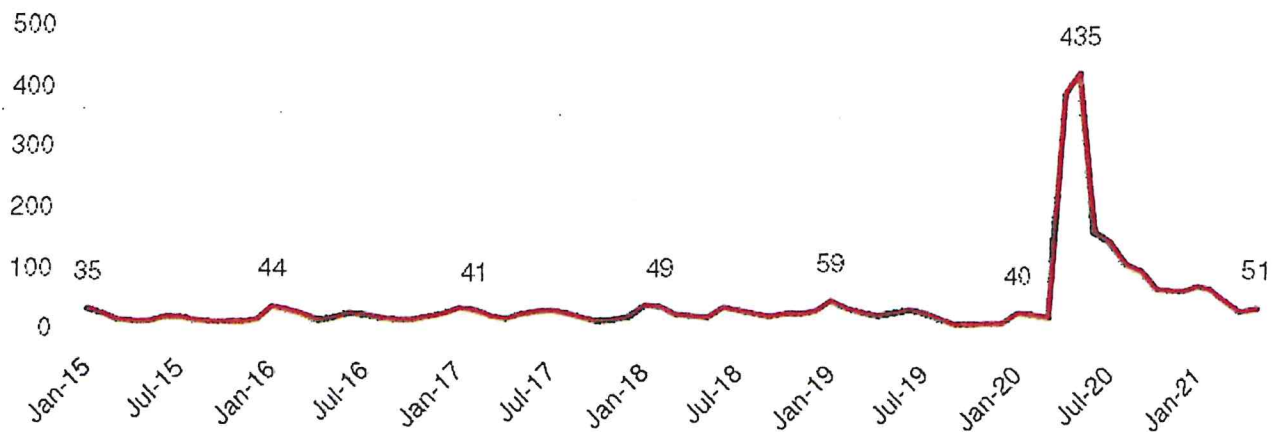


Figure 28: : Arts, Entertainment, and Recreation Industry Unemployment, Emsi 2021.2

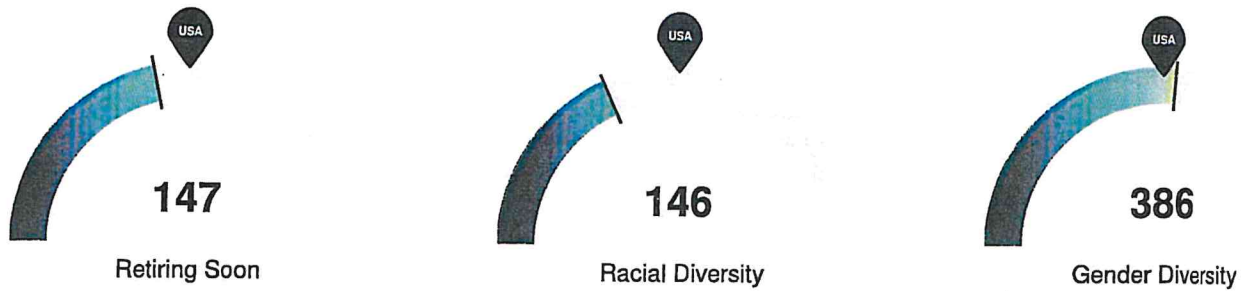


Target Sector: Tourism

Arts, Entertainment, & Recreation Workforce Characteristics

Workforce characteristics for the industry include retirement risk, racial diversity, and gender diversity. Retirement risk is low in the COEDD region for the Arts, Entertainment, and Recreation industry. The national average for employees who are 55 or older for a region of COEDD's size is 179 people, while the COEDD region is below this number with 147 people. Additionally, racial diversity is low in the area compared to the national average. For an area of COEDD's size, the national average is 229 racially diverse employees, compared to 146 people that are current in the industry. Finally, gender diversity is about average within the region, as 386 female employees work within the industry in the COEDD region compared to the national average of 378.

Retirement Risk is Low, While Overall Diversity is Low



*National average values are derived by taking the national value for Arts, Entertainment, and Recreation and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region. In other words, the values represent the national average adjusted for region size.

Figure 29: : Arts, Entertainment, and Recreation Industry Characteristics, Emsi 2021.2



Target Sector: Tourism



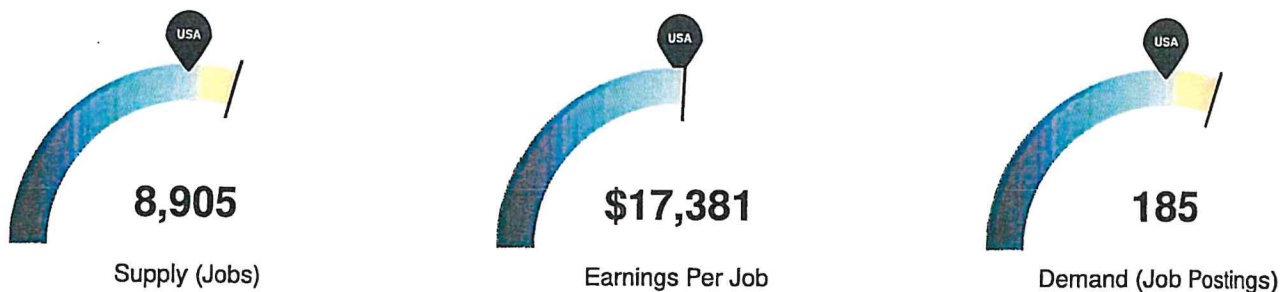
Target Sector: Tourism (continued)

For this analysis of regional tourism, we examine the NAICS 2-digit Industry level for both Arts, Entertainment, & Recreation (page 34) as well as Accommodation & Food Services (page 30).

Accommodation and Food Services

The region is in high supply of jobs for the Accommodation and Food Services industry when compared to a national scale*, employing 8,905 people. The COEDD region employs roughly 2,000 more people in this industry than a typical region of its size. Earnings per jobs is determined by using the total industry earnings divided by the number of jobs in the industry. That said, the earnings per job for this industry are below the national average*. The average salary for a job in this industry in the COEDD region is \$17,831 roughly \$8,000 less than the national average of \$25,989. Finally, demand for this industry is high in the region, as it is defined by the total amount of job postings in the area. There are 185 job postings a month in the COEDD region for this industry, about 50 posts higher than the national average of 137 per month.

Aggressive Hiring Competition Over a Deep Supply of Regional Talent



*National average values are derived by taking the national value for Accommodation and Food Services and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region. In other words, the values represent the national average adjusted for region size.

Figure 30: Accommodation and Food Services Industry Characteristics, Emsi 2021.2



Accommodation and Food Services Industry Breakdown

The Accommodation and Food Services industry saw increases in jobs over the past five years for each county in the region. Additionally, the industry looks to continue to grow in the next five years with all counties having positive projected job growth. In the last five years, 336 jobs were added to the industry, indicating a 4% overall increase in jobs for the region. In the next five years, jobs are projected to increase by 967, indicating a 11% increase. Average earnings for jobs in the industry varied between counties, ranging from approximately \$15,000-\$18,000. Location Quotient's (LQ) were above 1.0 for Payne and Pottawatomie County, indicating these regions have a concentration of Accommodation and Food services jobs in their regions.

Table 8: Accommodation and Food Services Industry Jobs, Emsi 2021.2

Region	2020 Jobs	Change 2015-2020		Change 2020-2025		Average Earnings	Payrolled Business Locations	LQ
Payne County	4,439	49	1%	348	8%	\$17,820	199	1.49
Pottawatomie County	2,751	91	3%	392	14%	\$17,730	135	1.43
Lincoln County	579	70	14%	58	10%	\$15,408	43	0.92
Seminole County	481	23	5%	14	3%	\$16,796	27	0.80
Pawnee County	272	41	18%	59	22%	\$14,729	23	0.90
Hughes County	228	48	27%	56	25%	\$15,077	18	0.81
Okfuskee County	156	13	9%	38	25%	\$15,844	12	0.72
Total	8,905	336	4%	967	11%	\$16,201	457	1.01



Target Sector: Tourism

Accommodation and Food Services Unemployment

After remaining relatively steady from 2015-2020, unemployment drastically spiked in April of 2020 due to the COVID-19 pandemic in the Accommodation and Food Services industry. After hitting nearly 2,875 unemployed workers, unemployment began to decrease and has continued to decrease until today where it is still considerably higher than pre-pandemic numbers. Payne County experienced the highest number of unemployed workers at the start of the pandemic, followed by Pottawatomie County. The two together both made up a majority of all unemployed workers.

Accommodation and Food Services Industry Unemployment
(2015-Present)

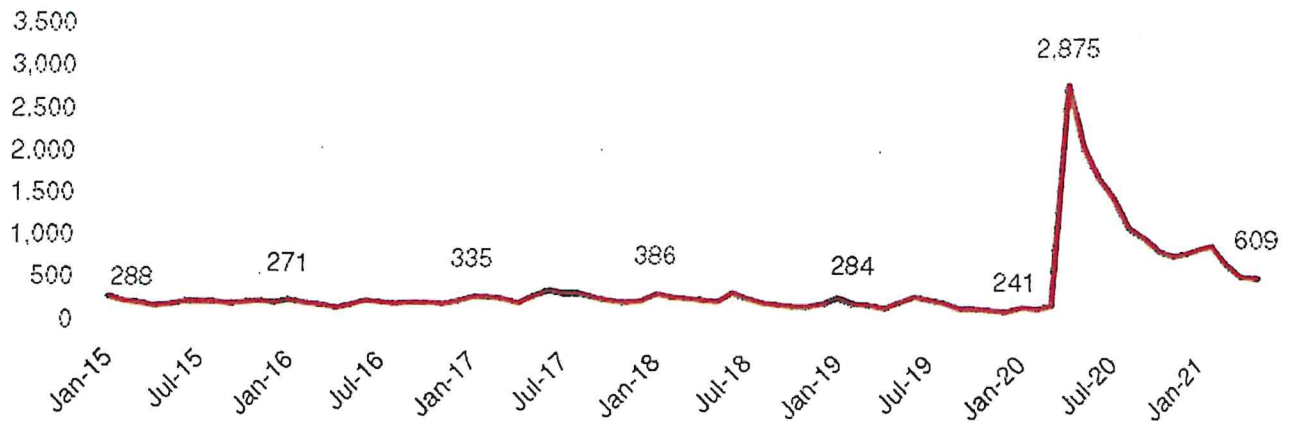


Figure 31: Accommodation and Food Services Industry Unemployment, Emsi 2021.2

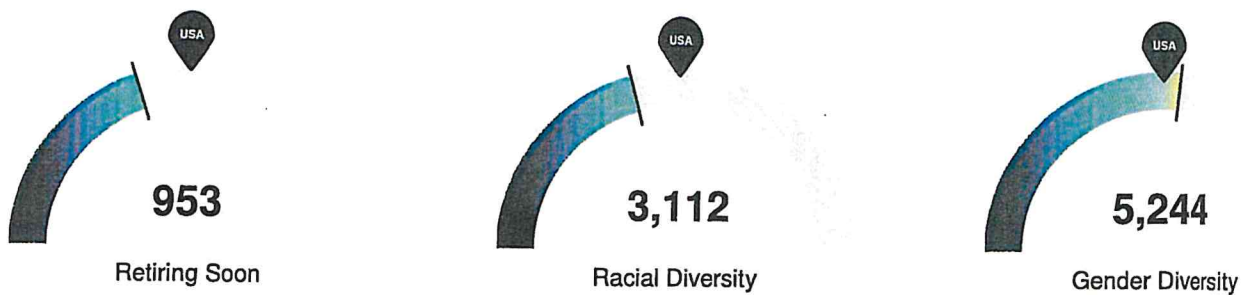


Target Sector: Tourism

Accommodation and Food Services Workforce Characteristics

Workforce characteristics for the industry include retirement risk, racial diversity, and gender diversity. The national average for employees who are 55 or older for a region of COEDD's size is 1,281 people, while the COEDD region is below this number with 953 people. Additionally, racial diversity is low in the area compared to the national average. For an area of COEDD's size, the national average is 4,037 racially diverse employees, compared to 3,113 people that are current in the industry. Finally, gender diversity is above average within the region, as 5,224 female employees work within the industry in the COEDD region compared to the national average of 4,801.

Retirement Risk Is Low, While Overall Diversity Is About Average



*National average values are derived by taking the national value for Arts, Entertainment, and Recreation and scaling it down to account for the difference in overall workforce size between the nation and the COEDD region. In other words, the values represent the national average adjusted for region size.

Figure 32: Accommodation and Food Services Industry Characteristics, Emsi 2021.2



Target Sector: Tourism