

STATE OF OKLAHOMA

2006 Administrative & Support Services Sector Analysis

DEFINITION OF INDUSTRY

The Administrative & Support Services sector consists of 46 NAICS codes that provide a broad variety of services. Generally, the 5 main categories in this sector include: equipment & facilities rental and leasing; employment and office support services; convention, travel and tour guide services; security and locksmith services; and janitorial, waste disposal and landscaping services.

SIGNIFICANCE AND HIGHLIGHTS

Approximately 7.0% of Oklahoma's total employment falls within this sector, with 3.0% of Oklahoma's total employment represented by three specific NAICS codes that are closely related: The Employment Placement Agency, Temporary Help Services, and Professional Employment Organization. Data reported for these three NAICS codes include people working across nearly all levels of the employment spectrum including nurses, accountants, welders, computer programmers, scientific researchers, assemblers, engineers, and many others. Professional Employment Organizations sometimes "lease" employees to companies. However, the reporting does not provide the detail by those customer industries.

Many sub-sectors within Administrative & Support Services pay below the state's average wage of \$31,856 while some pay higher. For Example, employees in the equipment & facilities rental category earned \$37,000 a year on average in 2005, and in that same year Oklahoma's tour operators on average earned \$52,000. Geographically, Administrative & Support Services can be divided into three general areas across Oklahoma: one third concentrated in the Tulsa Workforce Investment Area, one third in the Central Workforce Investment Area (Oklahoma City MSA), and the remaining third spread across the remainder of the state. Collectively Oklahoma's Location Quotient (LQ) for this sector is 1.1, with the two highest LQs within the Administrative & Support Services sector being the Telemarketing Bureau NAICS code and the Facilities Support Services NAICS code (LQs of 3.5 and 2.4 respectively).

DATA SOURCES

Data used for this analysis was obtained from the Oklahoma Employment Security Commission and included filings of Oklahoma employers as of June 2005.

SECTOR STATISTICS

Employer Units	4,915
Number of Employees	98,407
Percent of Total Oklahoma Employment	7.0%
Net Employment Change between 2003 and 2005	11,140
Average Annual Wages	\$22,53 I
Location Quotient	1.10
Change in Location Quotient from 2003 to 2005	4.6%

TOP FIVE INDUSTRIES IN THE ADMINISTRATIVE & SUPPORT SERVICES SECTOR

The top five industries employ 62,354 (or 63.4%) of a total of 98,407 in the entire sector.

NAICS	Industry	Employment	Percent of Sector
561320	Temporary Help Services	26,731	27.2%
561422	Telemarketing Bureaus	12,272	12.5%
561330	Professional Employer Organizations	12,236	12.4%
561720	Janitorial Services	6,562	6.7%
561730	Landscaping Services	4,553	4.6%

TOP EMPLOYERS IN THE ADMINISTRATIVE & SUPPORT SERVICES SECTOR

With combined employment of over 20,000 people, the top fifteen employers in this sector represent 21% of the total employment in the sector.

Company Name	Employee Range
Express Temporary Service	Over 1,000
Decisionone Corp	Over 1,000
AT&TWireless Services Inc.	Over 1,000
DIRECTV Customer Services Inc.	Over 1,000
Convergys Customer Management Group	Over 1,000
Electronic Data Systems Corp	Over 1,000
ADECCO USA Inc	Over 1,000
CCA of Tennessee Inc	Over 1,000
AMS Staff Leasing	Over 1,000
Access Employer Resources Inc	Over 1,000
Securitas Security Services USA Inc	Over 1,000
Manpower International Inc	Between 750 and 999
TCIM Services Inc	Between 750 and 999
West Telemarketing Corp	Between 750 and 999
Stand-By Personnel Inc	Between 750 and 999

INDUSTRY LOCATION QUOTIENTS

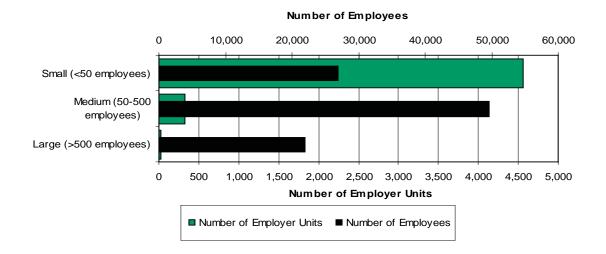
Of the 46 industry codes identified for this sector, 19 possess an Oklahoma LQ above 1.0 in 2005. Of those 19 industries, 11 experienced an LQ increase when compared to 2003. This means that for those 19 industry segments, Oklahoma has a higher concentration of employment relative to the nation as a whole, and the concentration is strengthening. For an explanation of how location quotients are calculated and what they mean, please see page 7.

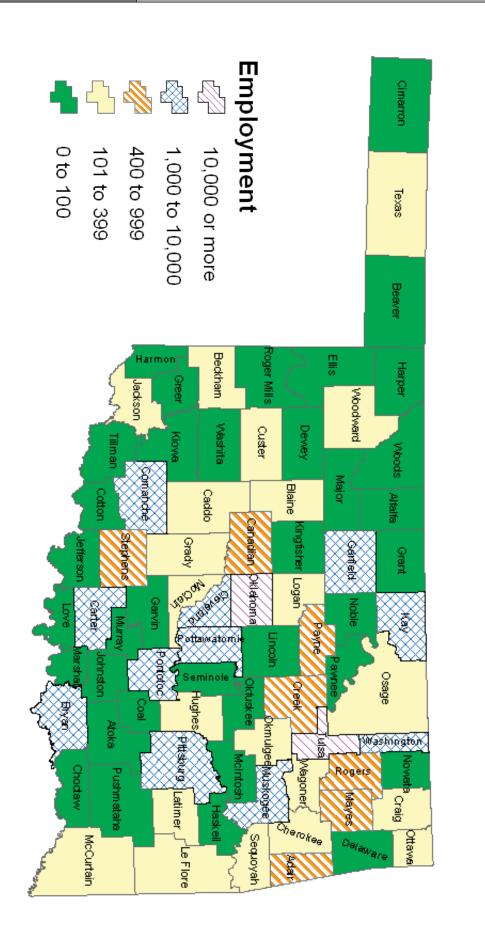
NAICS	Industry	2005	2003-2005
		Location Quotient	LQ % Change
561422	Telemarketing Bureaus	3.48	34.2%
561210	Facilities Support Services	2.35	-7.3%
561491	Repossession Services	1.90	24.1%
561990	All Other Support Services	I.84	-0.6%
561440	Collection Agencies	1.68	62.6%
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	1.63	5.9%
562212	Solid Waste Landfill	1.62	-6.9%
561330	Professional Employer Organizations	1.62	4.5%
561710	Exterminating and Pest Control Services	1.53	37.1%
562112	Hazardous Waste Collection	1.37	-6.8%
562998	All Other Miscellaneous Waste Management Services	1.26	4.3%
561421	Telephone Answering Services	1.26	-10.4%
561310	Employment Placement Agencies	1.23	20.0%
561492	Court Reporting and Stenotype Services	1.16	-14.4%
561621	Security Systems Services (except Locksmiths)	1.13	2.6%
562219	Other Nonhazardous Waste Treatment and Disposal	1.12	-30.0%
561410	Document Preparation Services	1.08	56.6%
561110	Office Administrative Services	1.08	-17.5%
561320	Temporary Help Services	I.03	3.1%

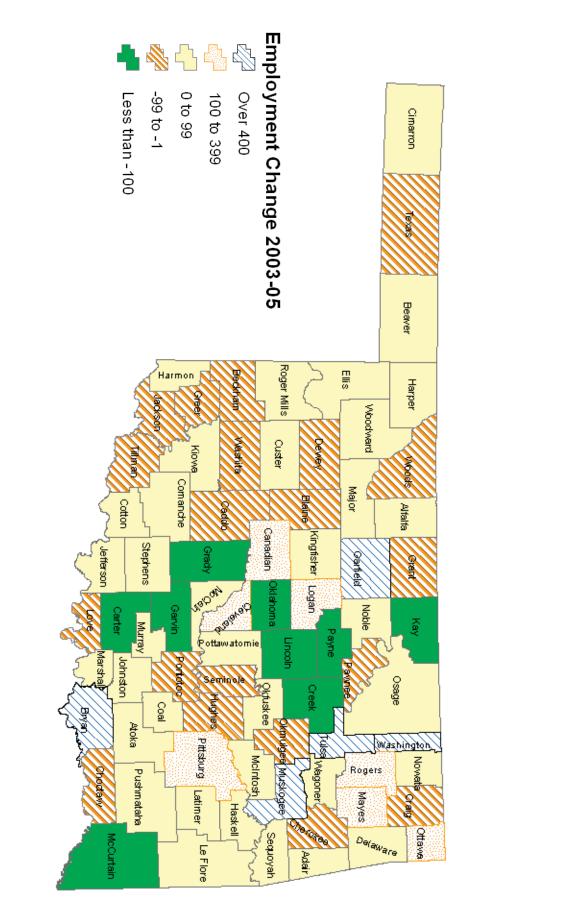
DISTRIBUTION OF EMPLOYER UNITS & JOBS BY EMPLOYER SIZE - JUNE 2005

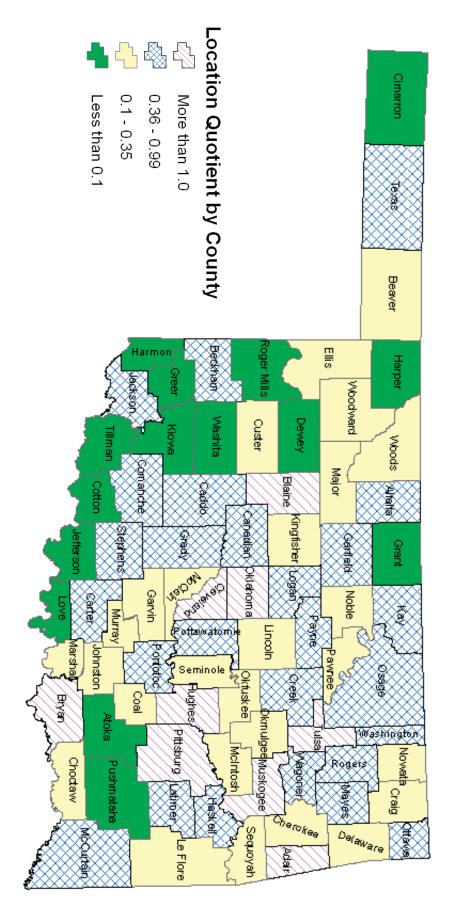
Employer units represent distinct locations, not individual companies. Therefore, a single company with seven locations would be counted as seven employer units. The percentage of employer units and employees in the small employer unit category is fairly typical. However, there is a higher than average percentage of employees falling into the medium sized employer unit category (50.4%) and a lower than average percentage of employees falling into the large sized employer unit category (22.3%).

Employer Size	Employer Units	# of Employees
Small (<50 employees)	4,563	26,853
Medium (50 - 500 employees)	325	49,568
Large (500 > employees)	27	21,986
Total	4,915	98,407









information contained in the "Industry Location Quotients" table, total Oklahoma industry employment information was compared to total national industry employment data contained in the accompanying map, the location quotients relate employment proportions in Oklahoma's county economies to the same employment proportion in the state economy. Location quotients measure the employment proportion within a given industry in a smaller economy relative to the same employment proportion in a larger economy. As information

the employment proportions within a given industry are equal in the county and the state economies quotients less than 1.0 indicate that industry employment is less concentrated in the county economy when compared to the state economy. Location quotients equal to 1.0 indicate that Location quotients greater than 1.0 indicate that employment in a given industry is more concentrated in the county economy when compared to the state economy. Conversely, location

Example:

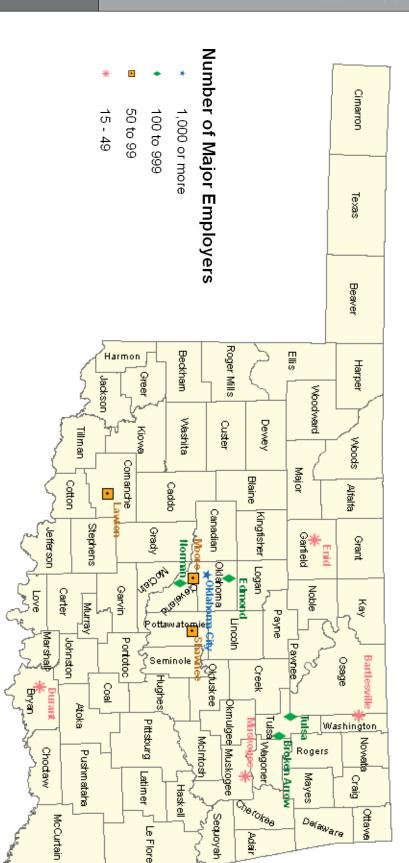
STATE OF OKLAHOMA

In the Administrative & Support Services industry cluster, Blaine County's location quotient equals 1.27. This indicates that the proportion of people employed in the Administrative & County's location quotient equals 0.74, which indicates that the proportion of people employed in the Administrative & Support Services industry cluster in Beckham County is 74% of the Administrative & Support Services industry employment proportion in the state as a whole Support Services industry cluster in Blaine County is 127% of the Administrative & Support Services industry employment proportion in the state as a whole. Conversely, Beckham

employed in this industry in Oklahoma is 348% of the same national proportion From the "Industry Location Quotients" table, the location quotient for the Telemarketing Bureaus industry (NAICS 561422) equaled 3.48, which indicates that the proportion of people

The most current national data available to compute location quotients is from the U.S. Bureau of Labor Statistics for June 2005

As



532411 Commercial Air, Rail, and Water Transportation Equipment Rental and Leasing This U.S. industry comprises establishments primarily engaged in renting or leasing off-highway transportation equipment without operators, such as aircraft, railroad cars, steamships, or tugboats.

532420 OFFICE MACHINERY AND EQUIPMENT RENTAL AND LEASING THIS INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN RENTING OR LEASING OFFICE MACHINERY AND EQUIPMENT, SUCH AS COMPUTERS, OFFICE FURNITURE, DUPLI-CATING MACHINES (I.E., COPIERS), OR FACSIMILE MACHINES.

532490 Other Commercial and Industrial Machinery and Equipment Rental and Leasing This industry comprises establishments primarily engaged in renting or leasing non consumer-type machinery and equipment (except heavy construction, transportation, mining, and forestry machinery and equipment without operators; and office machinery and equipment). Establishments in this industry rent or lease products, such as manufacturing equipment; metalworking, telecommunications, motion picture, or theatrical machinery and equipment; institutional (i.e., public building) furniture, such as furniture for schools, theaters, or buildings; or agricultural equipment without operators.

533110 Lessors of Non Financial Intangible Assets (except Copyrighted Works) This industry comprises establishments primarily engaged in assigning rights to assets, such as patents, trademarks, brand names, and/or franchise agreements for which a royalty payment or licensing fee is paid to the asset holder.

561110 OFFICE Administrative Services This industry comprises establishments primarily engaged in providing a range of day-to-day office administrative services, such as financial planning; billing and record keeping; personnel; and physical distribution and logistics for others on a contract or fee basis. These establishments do not provide operating staff to carry out the complete operations of a business.

561210 FACILITIES SUPPORT SERVICES THIS INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN PROVID-ING OPERATING STAFF TO PERFORM A COMBINATION OF SUPPORT SERVICES WITHIN A CLIENT'S FACILITIES. ESTABLISHMENTS IN THIS INDUSTRY TYPICALLY PROVIDE A COMBINATION OF SERVICES, SUCH AS JANITORIAL; MAINTENANCE; TRASH DISPOSAL; GUARD AND SECURITY; MAIL ROUTING; RECEPTION; LAUNDRY; AND RELATED SERVICES TO SUPPORT OPERATIONS WITHIN FACILITIES. THESE ESTAB-LISHMENTS PROVIDE OPERATING STAFF TO CARRY OUT THESE SUPPORT ACTIVITIES; BUT, ARE NOT INVOLVED WITH OR RESPONSIBLE FOR THE CORE BUSINESS OR ACTIVITIES OF THE CLIENT. ESTABLISHMENTS PROVIDING FACILITIES (EXCEPT COMPUTER AND/OR DATA PROCESSING) OPERATION SUPPORT SERVICES AND ESTABLISHMENTS OPERATING CORRECTIONAL FACILITIES (I.E., JAILS) ON A CON-TRACT OR FEE BASIS ARE INCLUDED IN THIS INDUSTRY.

561310 Employment Placement Agencies This industry comprises establishments primarily engaged in listing employment vacancies and in referring or placing applicants for employment. The individuals referred or placed are not employees of the employment agencies.

561320 Temporary Help Services This industry comprises establishments primarily engaged in supplying workers to clients' businesses for limited periods of time to supplement the working force of the client. The individuals provided are employees of the temporary help service establishment. However, these establishments do not provide direct supervision of their employees at the clients' work sites.

561330 PROFESSIONAL EMPLOYER ORGANIZATIONS This industry comprises establishments primarily ENGAGED IN PROVIDING HUMAN RESOURCES AND HUMAN RESOURCE MANAGEMENT SERVICES TO STAFF CLIENT BUSINESSES. ESTAB-LISHMENTS IN THIS INDUSTRY OPERATE IN A CO-EMPLOYMENT RELATIONSHIP WITH CLIENT BUSINESSES OR ORGANIZATIONS AND ARE SPECIALIZED IN PERFORMING A WIDE RANGE OF HUMAN RESOURCE AND PERSONNEL MANAGEMENT DUTIES, SUCH AS PAYROLL ACCOUNTING, PAYROLL TAX RETURN PREPARATION, BENEFITS ADMINISTRATION, RECRUITING, AND MANAGING LABOR RELATIONS.

561410 Document Preparation Services This industry comprises establishments primarily engaged in one or more of the following: (1) letter or resume writing; (2) document editing or proofreading; (3) typing, word processing, or desktop publishing; and (4) stenographic (except court reporting or stenotype recording), transcription, and other secretarial services.

561421 TELEPHONE ANSWERING SERVICES THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN ANSWERING TELEPHONE CALLS AND RELAYING MESSAGES TO CLIENTS.

561422 Telemarketing Bureaus This U.S. Industry comprises establishments primarily engaged in providing telemarketing services on a contract or fee basis for others, such as: (1) promoting clients' products or services by telephone, (2) taking orders for clients by telephone, and (3) soliciting contributions or providing information for clients by telephone. These establishments never own the product or provide the services they are representing and generally can originate and/or receive calls for others.

561431 Private Mail Centers This U.S. industry comprises (1) establishments primarily engaged in providing mailbox rental and other postal and mailing (except direct mail advertising) services or (2) establishments engaged in providing these mailing services along with one or more other office support services, such as facsimile services, word processing services, on-site PC rental services, and office product sales.

561439 Other Business Service Centers (including Copy Shops) This U.S. industry comprises (1) establishments generally known as copy centers or shops primarily engaged in providing photocopying, duplicating, blueprinting, and other document copying services, without also providing printing services (e.g., offset printing, quick printing, digital printing, prepress services) and (2) establishments (except private mail centers) engaged in providing a range of office support services (except printing services), such as document copying services, facsimile services, word processing services, on-site PC rental services, and office product sales.

561440 Collection Agencies This industry comprises establishments primarily engaged in collecting payments for claims and remitting payments collected to their clients.

561450 Credit Bureaus This industry comprises establishments primarily engaged in compiling information, such as credit and employment histories on individuals and credit histories on businesses, and providing the information to financial institutions, retailers, and others who have a need to evaluate the creditworthiness of these persons and businesses

561491 Repossession Services This U.S. industry comprises establishments primarily engaged in repossessing tangible assets (e.g., automobiles, boats, equipment, planes, furniture, appliances) for the creditor as a result of delinquent debts.

561492 Court Reporting and Stenotype Services This U.S. industry comprises establishments primar-ILY ENGAGED IN PROVIDING VERBATIM REPORTING AND STENOTYPE RECORDING OF LIVE LEGAL PROCEEDINGS AND TRANSCRIBING SUBSEQUENT RECORDED MATERIALS.

561499 All Other Business Support Services This U.S. Industry comprises establishments primarily engaged in providing business support services (except secretarial and other document preparation services; telephone answering and telemarketing services; private mail services or document copying services conducted as separate activities or in conjunction with other office support services; monetary debt collection services; credit reporting services; repossession services; and court reporting and stenotype recording services).

561510 TRAVEL AGENCIES THIS INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN ACTING AS AGENTS IN SELL-ING TRAVEL, TOUR, AND ACCOMMODATION SERVICES TO THE GENERAL PUBLIC AND COMMERCIAL CLIENTS.

561520 Tour Operators This industry comprises establishments primarily engaged in arranging and assembling tours. The tours are sold through travel agencies or tour operators. Travel or wholesale tour operators are included in this industry.

561591 Convention and Visitors Bureaus This U.S. Industry comprises establishments primarily engaged in marketing and promoting communities and facilities to businesses and leisure travelers through a range of activities, such as assisting organizations in locating meeting and convention sites; providing travel information on area attractions, lodging accommodations, restaurants; providing maps; and organizing group tours of local historical, recreational, and cultural attractions.

561599 All Other Travel Arrangement and Reservation Services This U.S. industry comprises establishments (except travel agencies, tour operators, and convention and visitors bureaus) primarily engaged in providing travel arrangement and reservation services.

561611 Investigation Services This U.S. industry comprises establishments primarily engaged in providing investigation and detective services.

561612 Security Guards and Patrol Services This U.S. industry comprises establishments primarily engaged in providing guard and patrol services, such as bodyguard, guard dog, and parking security services.

561613 Armored Car Services This U.S. industry comprises establishments primarily engaged in picking up and delivering money, receipts, or other valuable items. These establishments maintain personnel and equipment to protect such properties while in transit

561621 Security Systems Services (except Locksmiths) This U.S. industry comprises establishments primarily engaged in (1) selling security alarm systems, such as burglar and fire alarms, along with installation, repair, or monitoring services or (2) remote monitoring of electronic security alarm systems.

561622 Locksmiths This U.S. industry comprises establishments primarily engaged in (1) selling mechanical or electronic locking devices, safes, and security vaults, along with installation, repair, rebuilding, or adjusting services or (2) installing, repairing, rebuilding, and adjusting mechanical or electronic locking devices, safes, and security vaults.

561710 Exterminating and Pest Control Services This industry comprises establishments primarily en-GAGED IN EXTERMINATING AND CONTROLLING BIRDS, MOSQUITOES, RODENTS, TERMITES, AND OTHER INSECTS AND PESTS (EXCEPT FOR CROP PRODUCTION AND FORESTRY PRODUCTION). ESTABLISHMENTS PROVIDING FUMIGATION SERVICES ARE INCLUDED IN THIS INDUSTRY.

561720 Janitorial Services This industry comprises establishments primarily engaged in cleaning building interiors, interiors of transportation equipment (e.g., aircraft, rail cars, ships), and/or windows.

561730 Landscaping Services This industry comprises (1) establishments primarily engaged in providing landscape care and maintenance services and/or installing trees, shrubs, plants, lawns, or gardens and (2) establishments primarily engaged in providing these services along with the design of landscape plans and/or the construction (1.E., installation) of walkways, retaining walls, decks, fences, ponds, and similar structures.

561740 CARPET AND UPHOLSTERY CLEANING SERVICES THIS INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY EN-GAGED IN CLEANING AND DYEING USED RUGS, CARPETS, AND UPHOLSTERY.

561790 Other Services to Buildings and Dwellings This industry comprises establishments primar-Ily engaged in providing services to buildings and dwellings (except exterminating and pest control; janitorial; Landscaping care and maintenance; and carpet and upholstery cleaning).

561910 Packaging and Labeling Services This industry comprises establishments primarily engaged in packaging client-owned materials. The services may include labeling and/or imprinting the package.

561920 Convention and Trade Show Organizers This industry comprises establishments primarily engaged in organizing, promoting, and/or managing events, such as business and trade shows, conventions, conferences, and meetings (whether or not they manage and provide the staff to operate the facilities in which these events take place).

561990 All Other Support Services This industry comprises establishments primarily engaged in providing day-to-day business and other organizational support services (except office administrative services, facilities support services, employment services, business support services, travel arrangement and reservation services, security and investigation services, services to buildings and other structures, packaging and labeling services, and convention and trade show organizing services).

562111 Solid Waste Collection This U.S. industry comprises establishments primarily engaged in one of the following: (1) collecting and/or hauling nonhazardous solid waste (i.e., garbage) within a local area; (2) operating nonhazardous solid waste transfer stations; and (3) collecting and/or hauling mixed recyclable materials within a local area.

562112 HAZARDOUS WASTE COLLECTION THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN COLLECTING AND/OR HAULING HAZARDOUS WASTE WITHIN A LOCAL AREA AND/OR OPERATING HAZARDOUS WASTE TRANSFER STATIONS. HAZARDOUS WASTE COLLECTION ESTABLISHMENTS MAY BE RESPONSIBLE FOR THE IDENTIFICATION, TREATMENT, PACKAG-ING, AND LABELING OF WASTE FOR THE PURPOSES OF TRANSPORT.

562119 Other Waste Collection This U.S. industry comprises establishments primarily engaged in collecting and/or hauling waste (except nonhazardous solid waste and hazardous waste) within a local area.

562211 HAZARDOUS WASTE TREATMENT AND DISPOSAL THIS U.S. INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN (1) OPERATING TREATMENT AND/OR DISPOSAL FACILITIES FOR HAZARDOUS WASTE OR (2) THE COMBINED ACTIVITY OF COLLECTING AND/OR HAULING OF HAZARDOUS WASTE MATERIALS WITHIN A LOCAL AREA AND OPERATING TREATMENT OR DISPOSAL FACILITIES FOR HAZARDOUS WASTE.

562212 Solid Waste Landfill This U.S. industry comprises establishments primarily engaged in (1) operating landfills for the disposal of nonhazardous solid waste or (2) the combined activity of collecting and/or hauling nonhazardous waste materials within a local area and operating landfills for the disposal of nonhazardous solid waste.

562219 Other Nonhazardous Waste Treatment and Disposal This U.S. industry comprises establishments primarily engaged in (1) operating nonhazardous waste treatment and disposal facilities (except landfills, combustors, incinerators and sewer systems or sewage treatment facilities) or (2) the combined activity of collecting and/or hauling of nonhazardous waste materials within a local area and operating waste treatment facilities (except landfills, combustors, incinerators and sever systems, incinerators, incinerators and sever systems). Compost dumps are included in this industry.

562910 Remediation Services This industry comprises establishments primarily engaged in one or more of the following: (1) remediation and cleanup of contaminated buildings, mine sites, soil, or ground water; (2) integrated mine reclamation activities, including demolition, soil remediation, waste water treatment, hazardous material removal, contouring land, and revegetation; and (3) asbestos, lead paint, and other toxic material abatement.

562920 MATERIALS RECOVERY FACILITIES THIS INDUSTRY COMPRISES ESTABLISHMENTS PRIMARILY ENGAGED IN (1) OPER-ATING FACILITIES FOR SEPARATING AND SORTING RECYCLABLE MATERIALS FROM NONHAZARDOUS WASTE STREAMS (I.E., GARBAGE) AND/OR (2) OPERATING FACILITIES WHERE COMMINGLED RECYCLABLE MATERIALS, SUCH AS PAPER, PLASTICS, USED BEVERAGE CANS, AND METALS, ARE SORTED INTO DISTINCT CATEGORIES.

562991 Septic Tank and Related Services This U.S. industry comprises establishments primarily engaged in (1) pumping (i.e., cleaning) septic tanks and cesspools and/or (2) renting and/or servicing portable toilets.

562998 All Other Miscellaneous Waste Management Services This U.S. Industry comprises establishments primarily engaged in providing waste management services (except waste collection, waste treatment and disposal, remediation, operation of materials recovery facilities, septic tank pumping and related services, and waste management consulting services).