



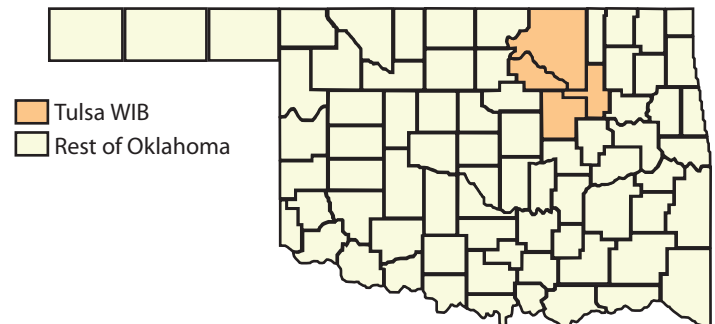
GOVERNOR'S COUNCIL FOR WORKFORCE AND ECONOMIC DEVELOPMENT

EDUCATION ECONOMIC DEVELOPMENT EMPLOYMENT

TULSA WORKFORCE INVESTMENT AREA 2005 REGIONAL CLUSTER ANALYSIS

The four-county region that makes up the Workforce Investment Area has a total population of 691,715, or twenty percent of Oklahoma's population. Fifty-nine percent (405,770) of the population are of working age, 20 to 64 years old. Twelve percent are of retirement age, or over 64 years old. Eighty percent have at least a high school diploma. Sixteen percent have at least a bachelor's degree. Total employment in the region is 348,771.

County	Population	Employment
Creek	67,367	17,303
Osage	44,437	5,760
Pawnee	16,612	3,585
Tulsa	563,299	322,123
Total	691,715	348,771



Rank	Industry	Number of Establishments	Number of Employees	Average Wage
1	Trade	4,556	54,587	\$29,190
2	Manufacturing	1,538	39,461	\$41,787
3	Local Health Care Services	1,889	37,916	\$35,228
4	Education	244	26,232	\$25,323
5	Finance & Insurance	1,573	20,257	\$32,420
6	Professional Services	2,920	18,241	\$44,546
7	Construction	2,207	16,449	\$30,674
8	Logistics	568	15,944	\$46,922
9	Government	307	12,792	\$38,641
10	Oil & Gas	591	10,976	\$73,690

Data used for this analysis was obtained from the Oklahoma Employment Security Commission and included filings of Oklahoma employers as of March 2004.

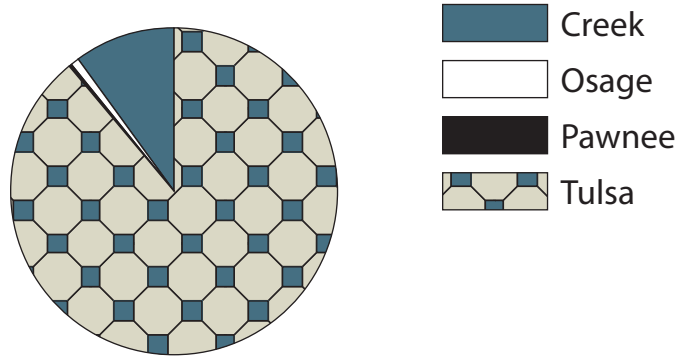
There is duplication of establishment data from the Oil and Gas cluster into the Manufacturing cluster. Although much smaller than the Manufacturing cluster, the oil & gas cluster was detailed out because of its crossover into production industries and its importance to the region. The number of employees will not add up to the total employment of the region.

Retail trade and wholesale trade are not considered "wealth generating" industries in most cases. This means that they usually do not bring new dollars into a region, but recirculate dollars within the region. This analysis focused on the remainder of the industries that have the potential to bring new dollars into the region.

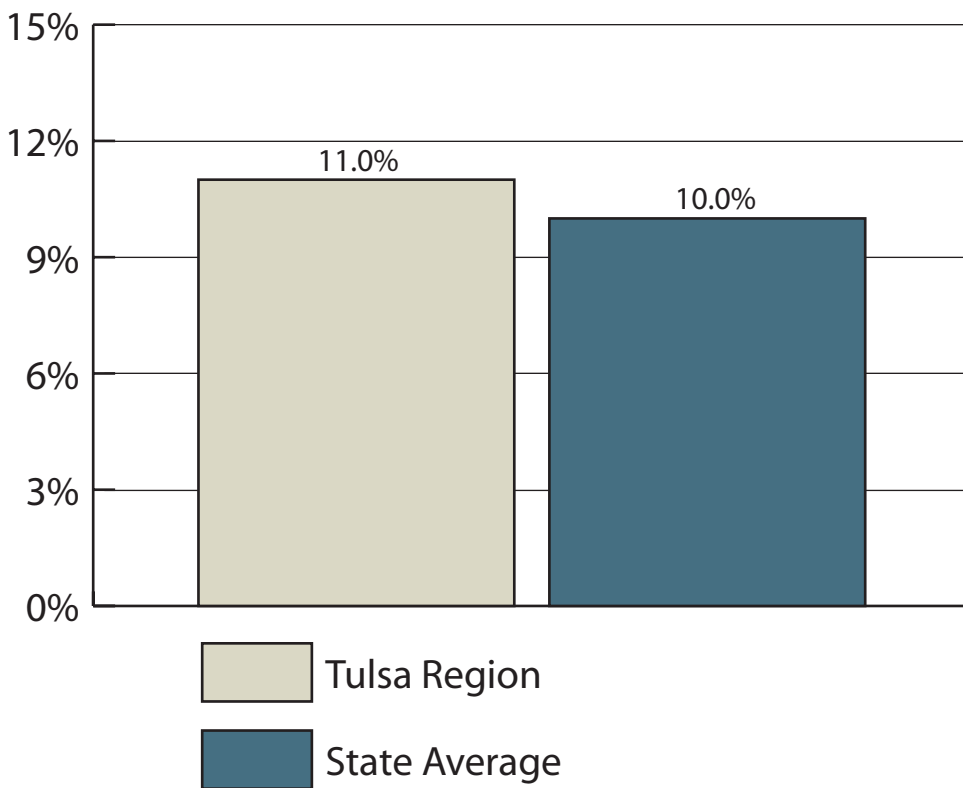
MANUFACTURING CLUSTER ANALYSIS

2004 REGIONAL DISTRIBUTION OF JOBS

County	Number of Jobs
Creek	3,943
Osage	289
Pawnee	116
Tulsa	35,113
Total	39,461



PERCENT OF JOBS IN CLUSTER



LARGEST SUB-CLUSTERS

NAICS	Sub-Cluster	Number of Employees
332912	Fluid Power Valve & Hose Fitting Manufacturing	1,597
333132	Oil & Gas Field Machinery & Equipment Manufacturing	1,409
339920	Sporting & Athletic Goods Manufacturing	1,368
332710	Machine Shops	1,335
335221	Household Cooking Appliance Manufacturing	(D)

(D) Data do not meet BLS or OESC disclosure standards.

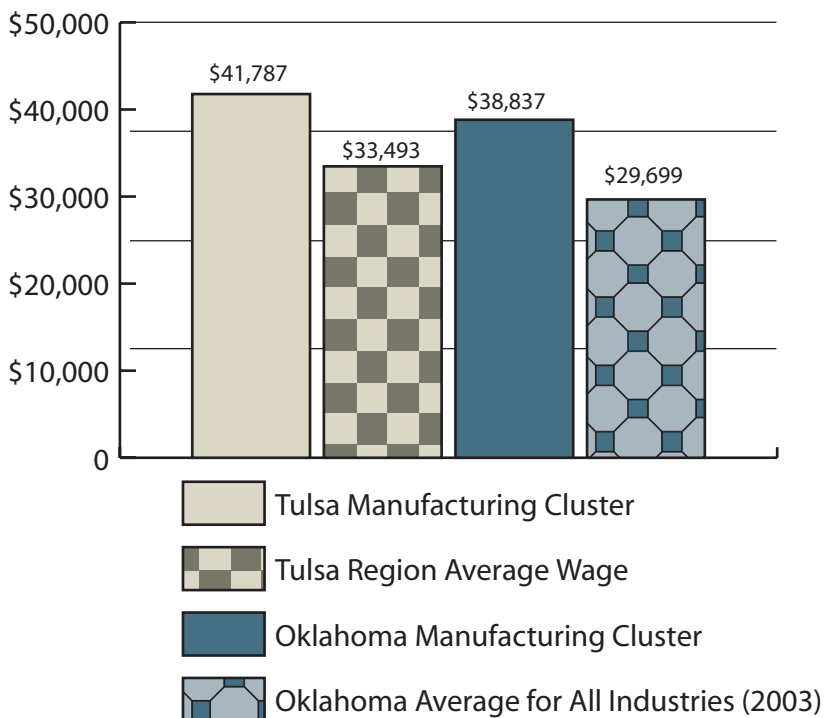
EMPLOYMENT TRENDS

Indicator	Jobs
Net Change in Job Volume between 2002 and 2004 in the Tulsa Region	-1,045
Statewide Projected Change in Cluster Employment between 2002 and 2012	+0.65%

MAJOR EMPLOYERS

Thirty-five employers in the manufacturing cluster in the Tulsa region have over 200 employees.

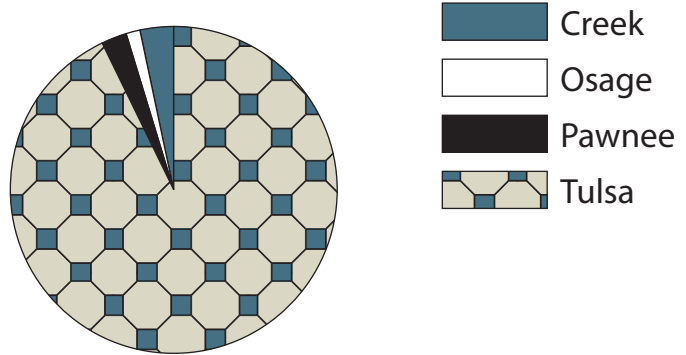
AVERAGE WAGE COMPARISONS



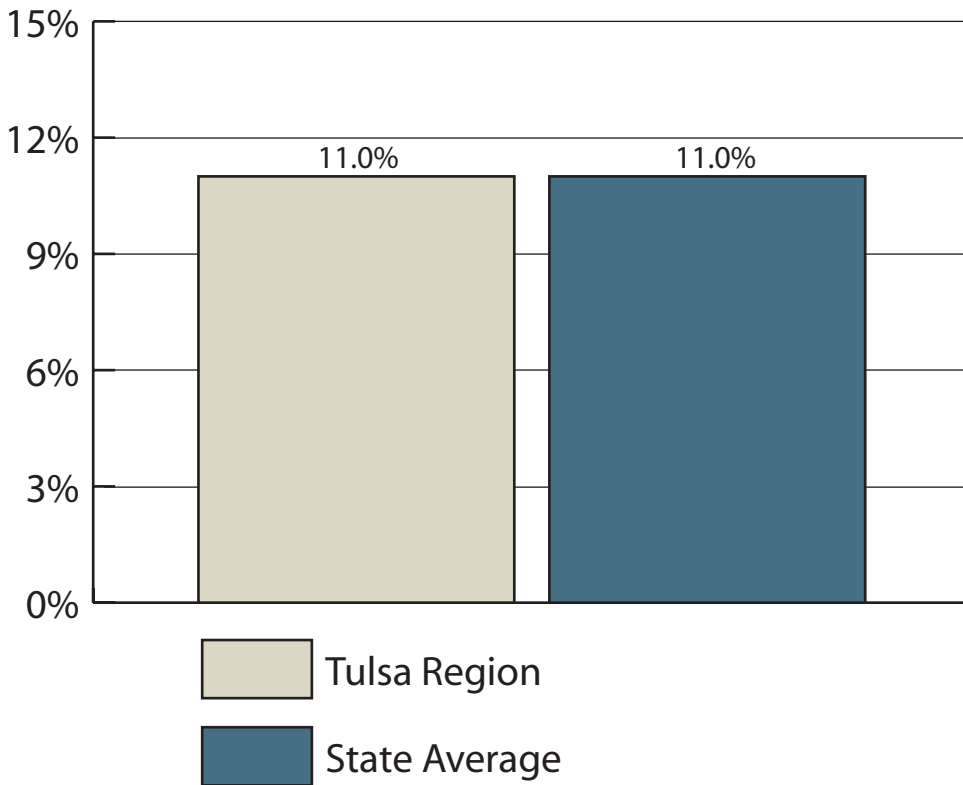
LOCAL HEALTH CARE SERVICES CLUSTER ANALYSIS

2004 REGIONAL DISTRIBUTION OF JOBS

County	Number of Jobs
Creek	1,160
Osage	568
Pawnee	981
Tulsa	35,207
Total	37,916



PERCENT OF JOBS IN CLUSTER



LARGEST SUB-CLUSTERS

NAICS	Sub-Cluster	Number of Employees
622110	General Medical & Surgical Hospitals	12,423
621111	Offices of Physicians (except mental health specialists)	6,964
623110	Nursing Care Facilities	3,670
621610	Home Health Care Services	2,967
621210	Offices of Dentists	1,902

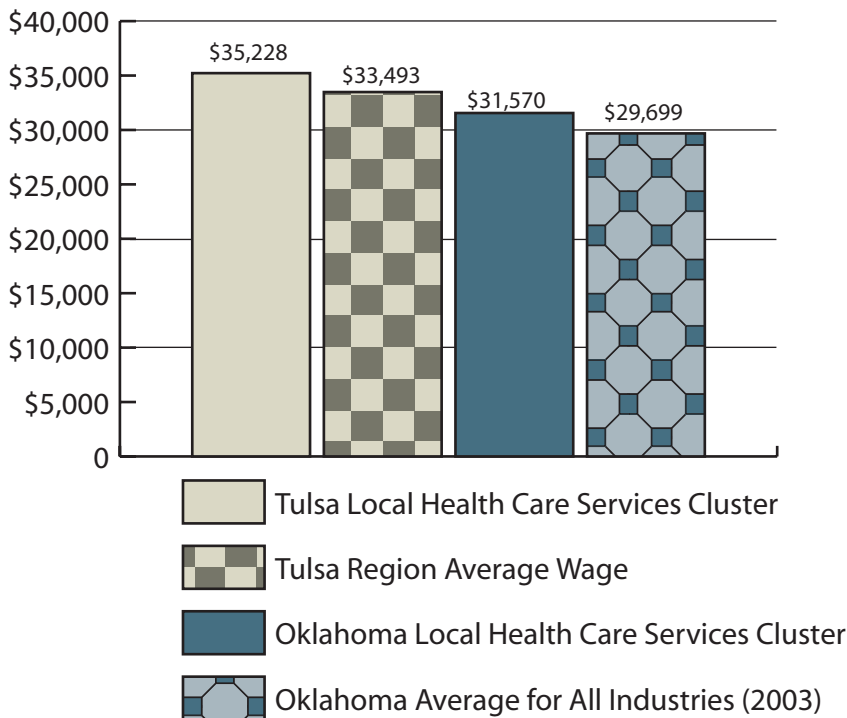
EMPLOYMENT TRENDS

Indicator	Jobs
Net Change in Job Volume between 2002 and 2004 in the Tulsa Region	-1,501
Statewide Projected Change in Cluster Employment between 2002 and 2012	+2.55%

MAJOR EMPLOYERS

Twenty-four employers in the local health care services cluster in the Tulsa region have over 200 employees.

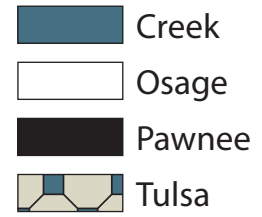
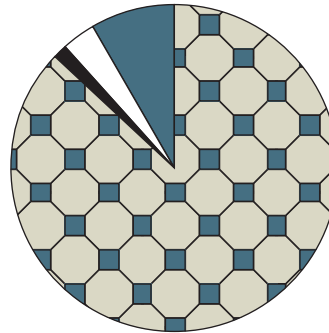
AVERAGE WAGE COMPARISONS



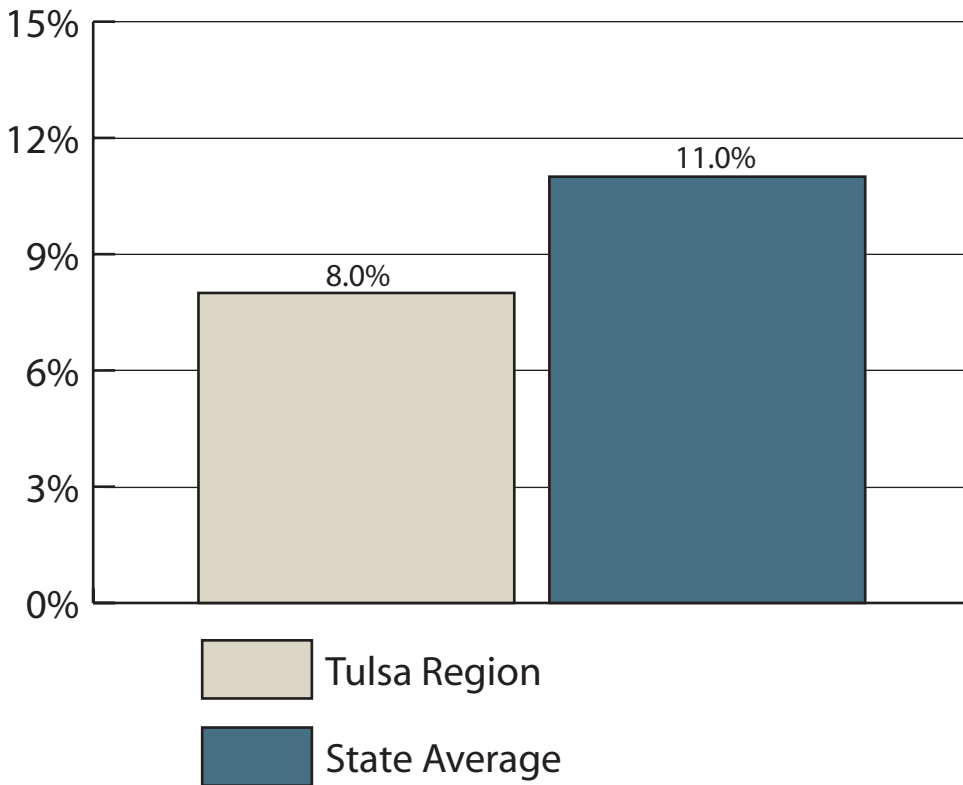
EDUCATION CLUSTER ANALYSIS

2004 REGIONAL DISTRIBUTION OF JOBS

County	Number of Jobs
Creek	2,131
Osage	863
Pawnee	390
Tulsa	22,848
Total	26,232



PERCENT OF JOBS IN CLUSTER



LARGEST SUB-CLUSTERS

NAICS	Sub-Cluster	Number of Employees
611110	Elementary & Secondary Schools	19,428
611210	Junior Colleges	(D)
611310	Colleges, Universities & Professional Schools	2,079
611513	Apprenticeship Training	695
611519	Other Technical & Trade Schools	397

(D) Data do not meet BLS or OESC disclosure standards.

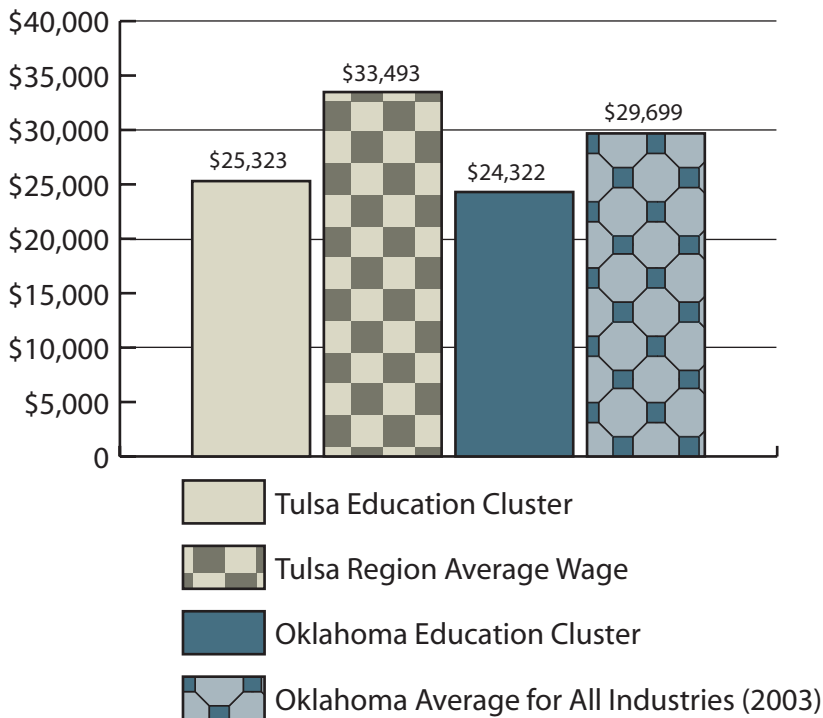
EMPLOYMENT TRENDS

Indicator	Jobs
Net Change in Job Volume between 2002 and 2004 in the Tulsa Region	+119
Statewide Projected Change in Cluster Employment between 2002 and 2012	+1.99%

MAJOR EMPLOYERS

Twenty employers in the education cluster in the Tulsa region have over 200 employees.

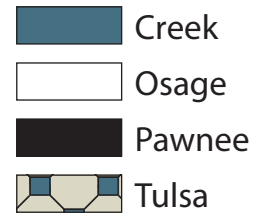
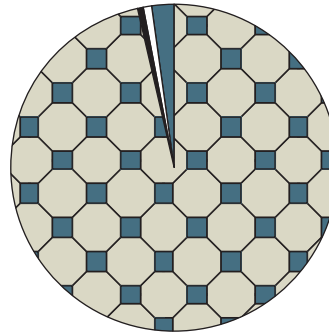
AVERAGE WAGE COMPARISONS



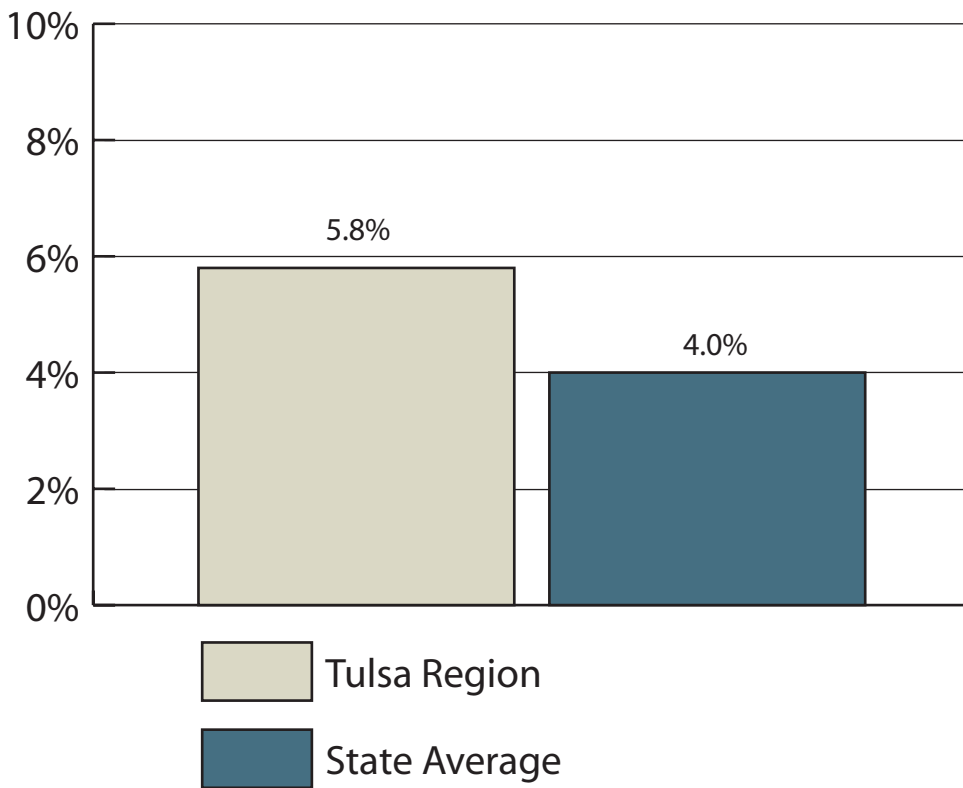
FINANCE & INSURANCE CLUSTER ANALYSIS

2004 REGIONAL DISTRIBUTION OF JOBS

County	Number of Jobs
Creek	396
Osage	177
Pawnee	119
Tulsa	19,565
Total	20,257



PERCENT OF JOBS IN CLUSTER



LARGEST SUB-CLUSTERS

NAICS	Sub-Cluster	Number of Employees
524210	Insurance Agencies & Brokerages	7,064
522110	Commercial Banking	4,396
524114	Direct Health & Medical Insurance Carriers	1,926
524126	Direct Property & Casualty Insurance Carriers	1,332
522210	Credit Card Issuing	(D)

(D) Data do not meet BLS or OESC disclosure standards.

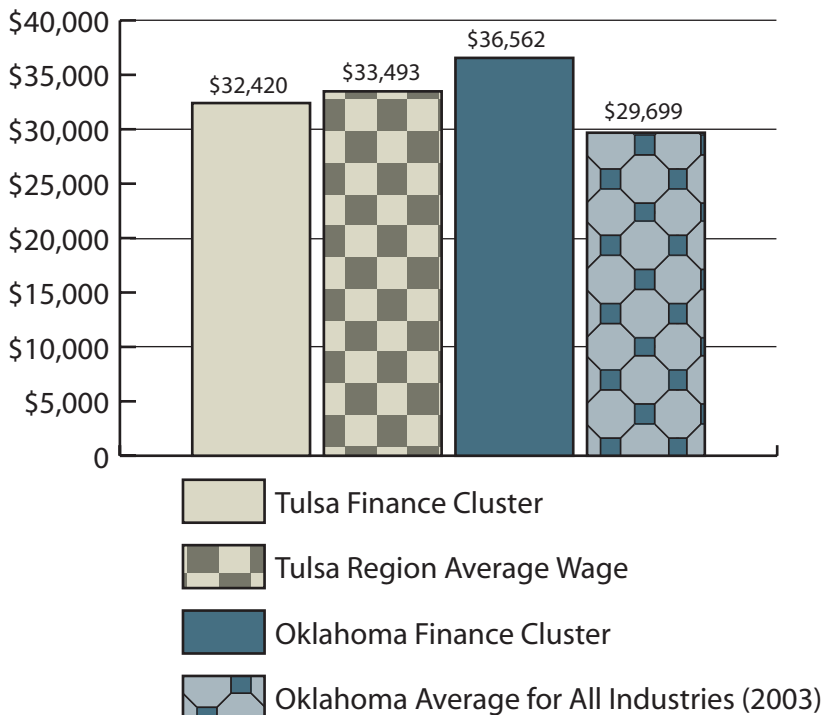
EMPLOYMENT TRENDS

Indicator	Jobs
Net Change in Job Volume between 2002 and 2004 in the Tulsa Region	+5,861
Statewide Projected Change in Cluster Employment between 2002 and 2012	+0.97%

MAJOR EMPLOYERS

Eleven employers in the finance & insurance cluster in the Tulsa region have over 200 employees.

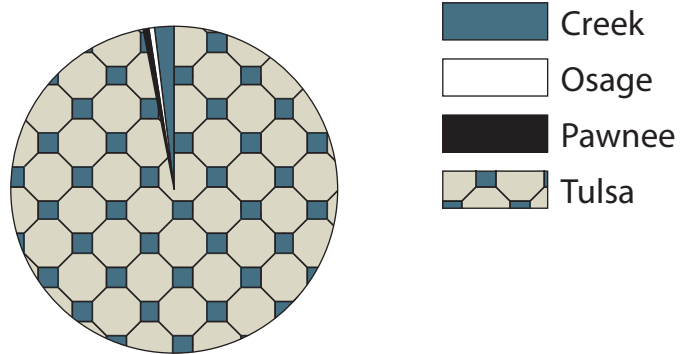
AVERAGE WAGE COMPARISONS



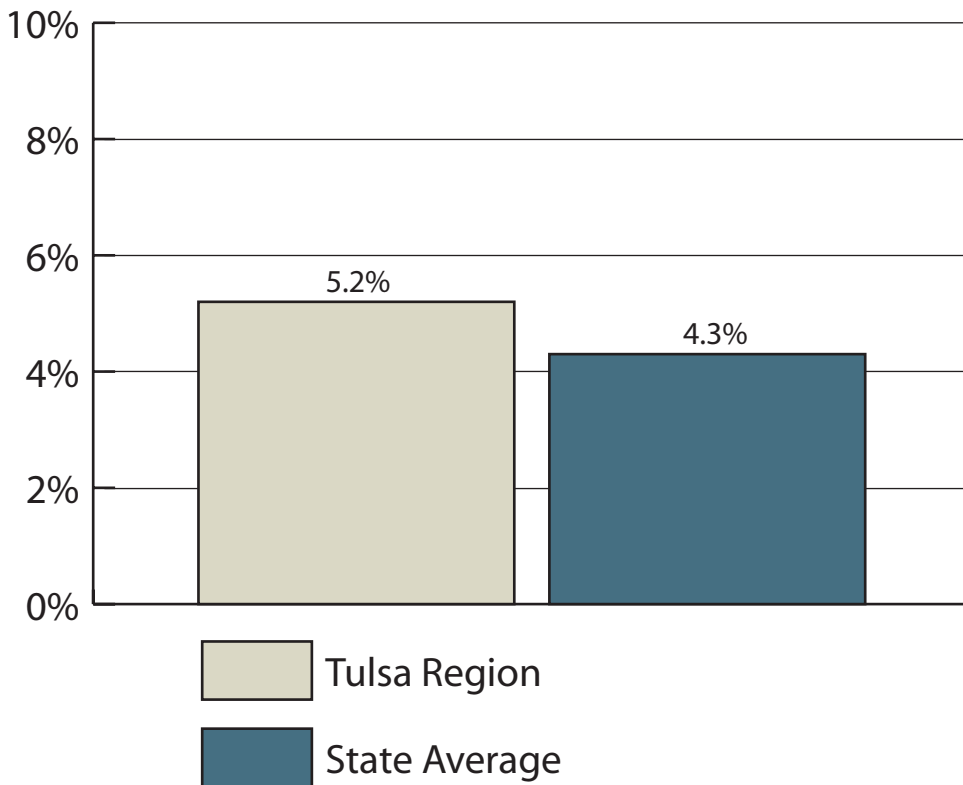
PROFESSIONAL SERVICES CLUSTER ANALYSIS

2004 REGIONAL DISTRIBUTION OF JOBS

County	Number of Jobs
Creek	335
Osage	94
Pawnee	87
Tulsa	17,725
Total	18,241



PERCENT OF JOBS IN CLUSTER



LARGEST SUB-CLUSTERS

NAICS	Sub-Cluster	Number of Employees
541110	Offices of Lawyers	3,276
541330	Engineering Services	2,209
541219	Other Accounting Services	1,777
541214	Payroll Services	1,511
541211	Offices of Certified Public Accountants	1,258

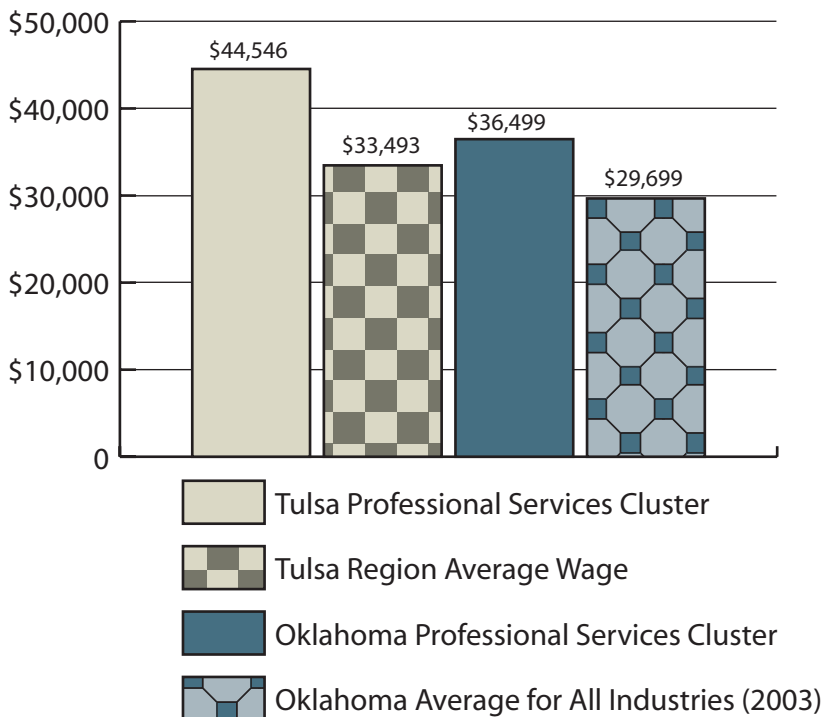
EMPLOYMENT TRENDS

Indicator	Jobs
Net Change in Job Volume between 2002 and 2004 in the Tulsa Region	+160
Statewide Projected Change in Cluster Employment between 2002 and 2012	+3.66%

MAJOR EMPLOYERS

Seven employers in the professional services cluster in the Tulsa region have over 200 employees.

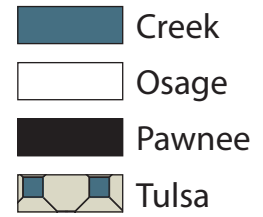
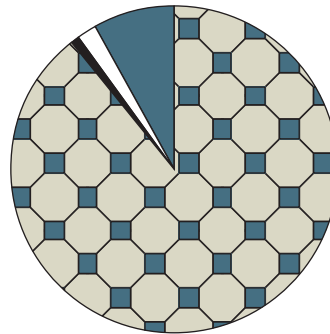
AVERAGE WAGE COMPARISONS



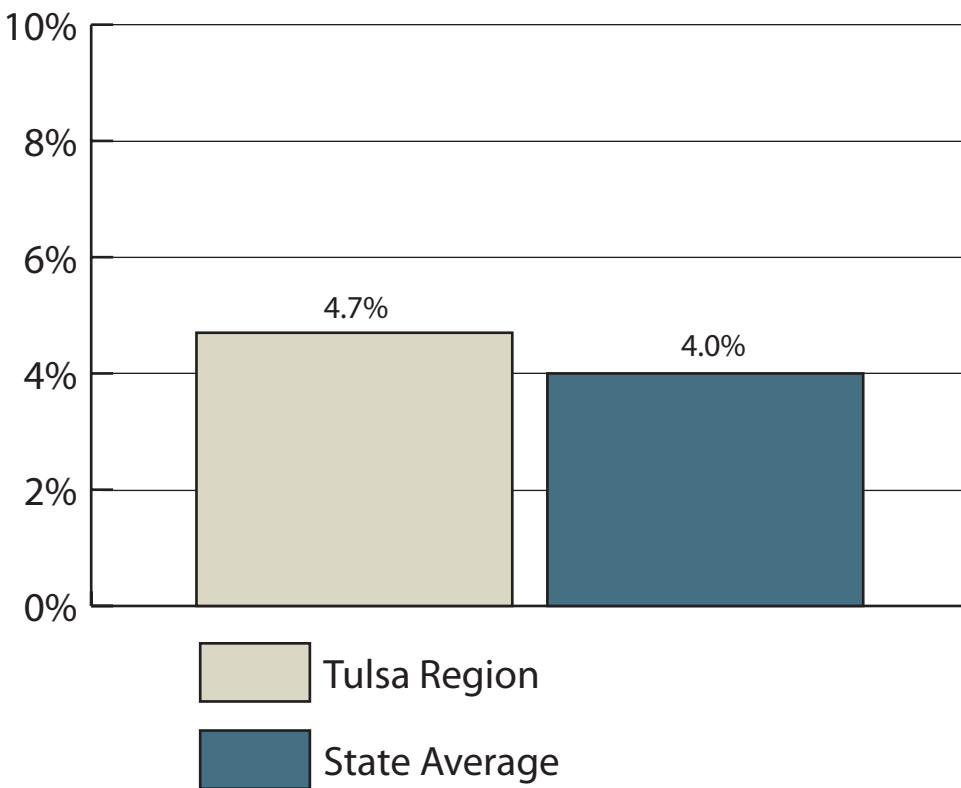
CONSTRUCTION CLUSTER ANALYSIS

2004 REGIONAL DISTRIBUTION OF JOBS

County	Number of Jobs
Creek	1,323
Osage	295
Pawnee	121
Tulsa	14,706
Total	16,445



PERCENT OF JOBS IN CLUSTER



LARGEST SUB-CLUSTERS

NAICS	Sub-Cluster	Number of Employees
237310	Highway, Street & Bridge Construction	1,578
236220	Commercial & Institutional Building Construction	1,384
238212	Electrical Contractors (not elsewhere classified)	1,360
238211	Electrical Contractors	1,214
238221	Plumbing, Heating & Air-Conditioning Contractors	1,147

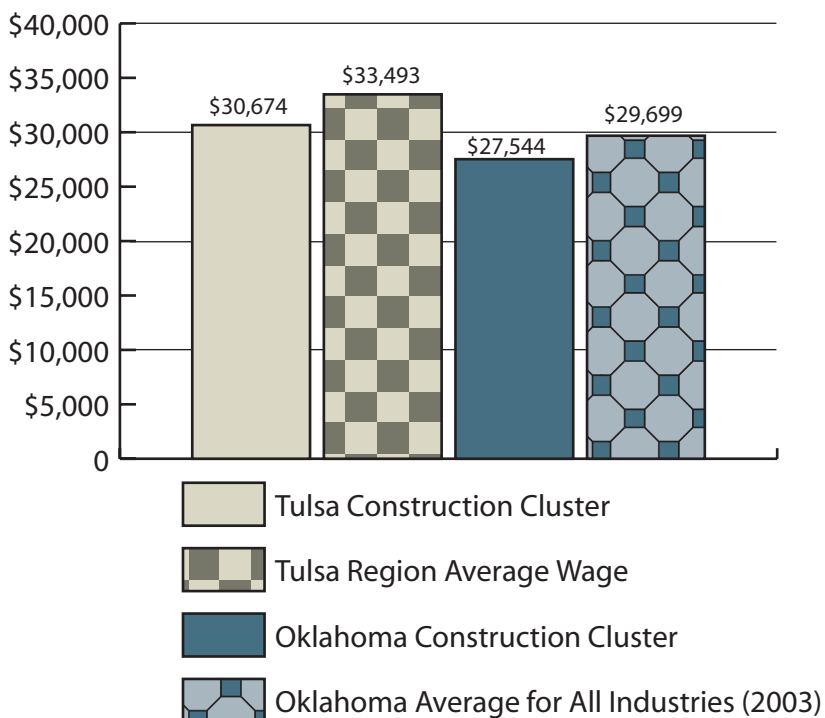
EMPLOYMENT TRENDS

Indicator	Jobs
Net Change in Job Volume between 2002 and 2004 in the Tulsa Region	-1,384
Statewide Projected Change in Cluster Employment between 2002 and 2012	+0.8%

MAJOR EMPLOYERS

Five employers in the construction cluster in the Tulsa region have over 200 employees.

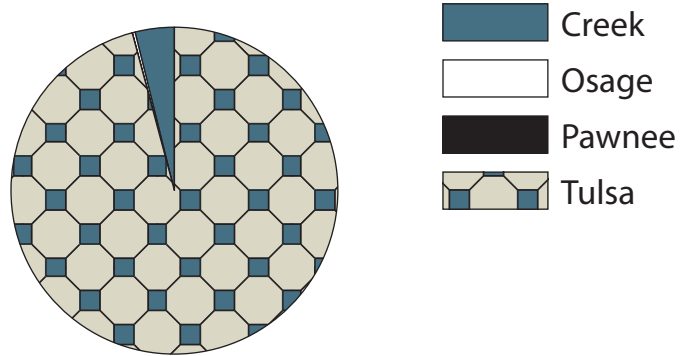
AVERAGE WAGE COMPARISONS



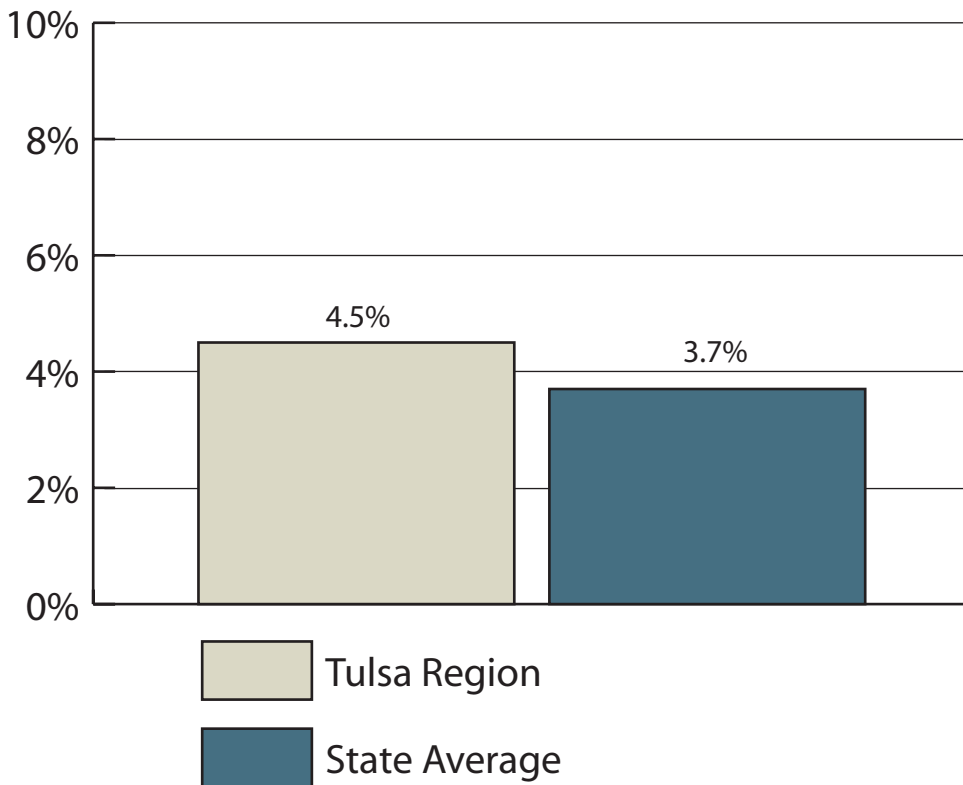
LOGISTICS CLUSTER ANALYSIS

2004 REGIONAL DISTRIBUTION OF JOBS

County	Number of Jobs
Creek	589
Osage	46
Pawnee	23
Tulsa	15,286
Total	15,944



PERCENT OF JOBS IN CLUSTER



LARGEST SUB-CLUSTERS

NAICS	Sub-Cluster	Number of Employees
481111	Scheduled Passenger Air Transportation	7,794
484121	General Freight Trucking, Long-Distance, Truckload	2,596
492110	Couriers	1,026
484110	General Freight Trucking, Local	719
488190	Other Support Activities for Air Transportation	577

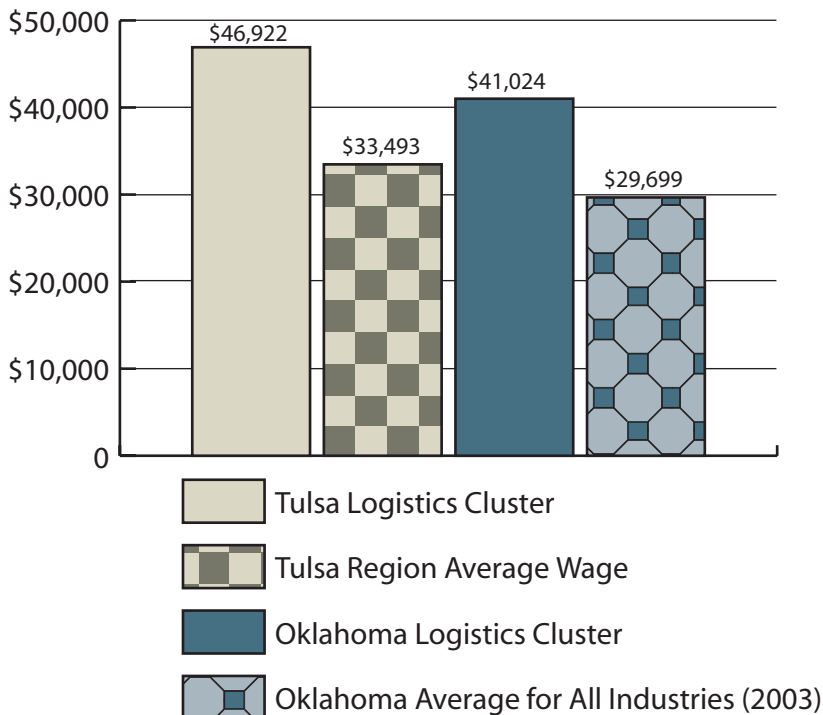
EMPLOYMENT TRENDS

Indicator	Jobs
Net Change in Job Volume between 2002 and 2004 in the Tulsa Region	-1,131
Statewide Projected Change in Cluster Employment between 2002 and 2012	+1.15%

MAJOR EMPLOYERS

Six employers in the logistics cluster in the Tulsa region have over 200 employees.

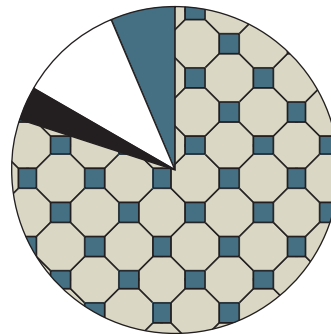
AVERAGE WAGE COMPARISONS



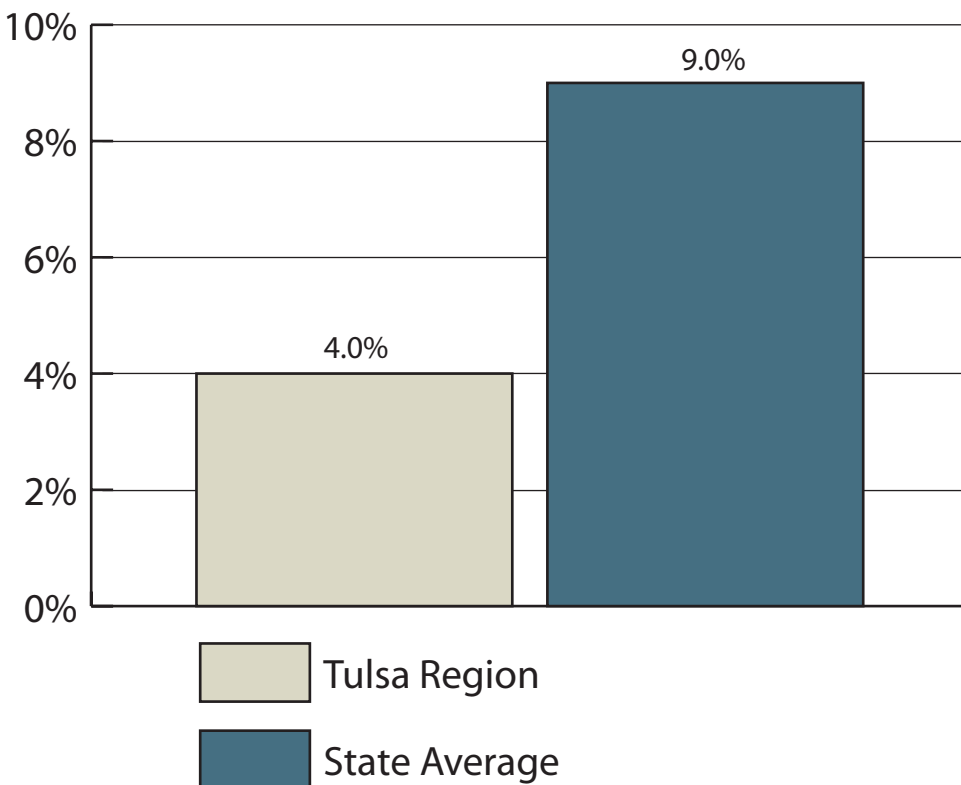
GOVERNMENT CLUSTER ANALYSIS

2004 REGIONAL DISTRIBUTION OF JOBS

County	Number of Jobs
Creek	803
Osage	1,294
Pawnee	433
Tulsa	10,262
Total	12,792



PERCENT OF JOBS IN CLUSTER



LARGEST SUB-CLUSTERS

NAICS	Sub-Cluster	Number of Employees
491110	Postal Service	(D)
922120	Police Protection	1,893
923130	Administration of Human Resources Programs	1,224
922140	Correctional Facilities	1,191
922160	Fire Protection	1,060

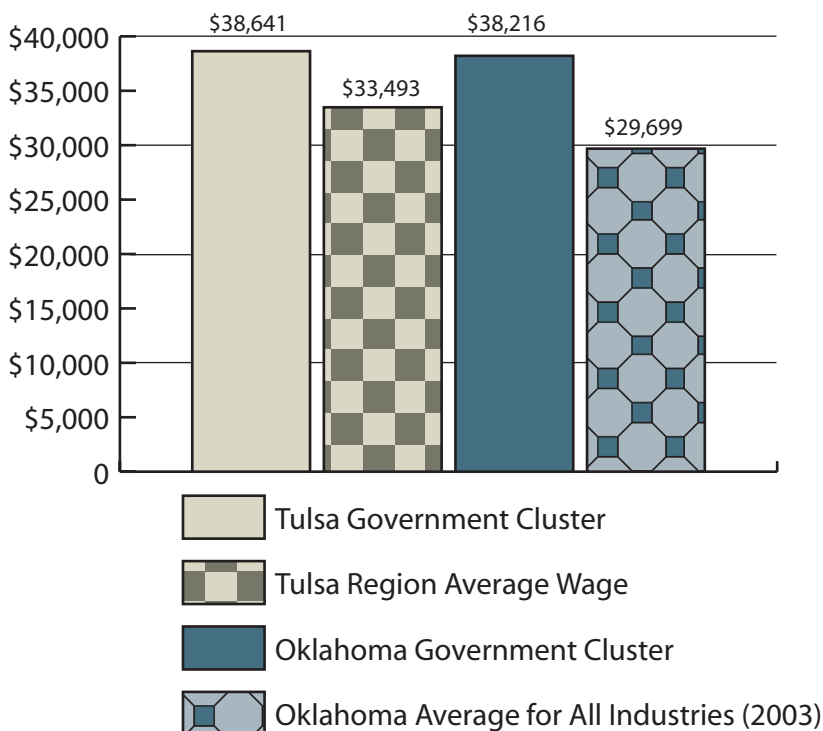
EMPLOYMENT TRENDS

Indicator	Jobs
Net Change in Job Volume between 2002 and 2004 in the Tulsa Region	-153
Statewide Projected Change in Cluster Employment between 2002 and 2012	Federal: +0.88% State: +0.64% Local +1.27%

MAJOR EMPLOYERS

Nine employers in the government cluster in the Tulsa region have over 200 employees.

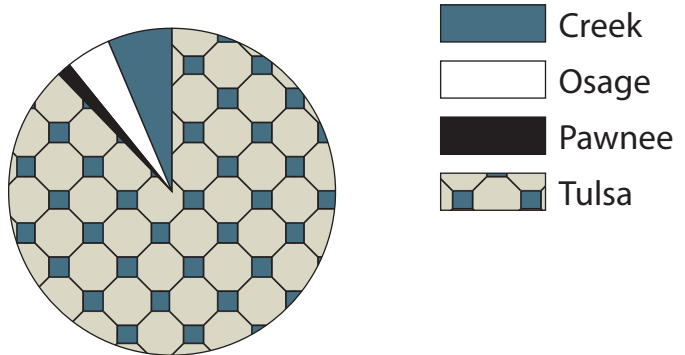
AVERAGE WAGE COMPARISONS



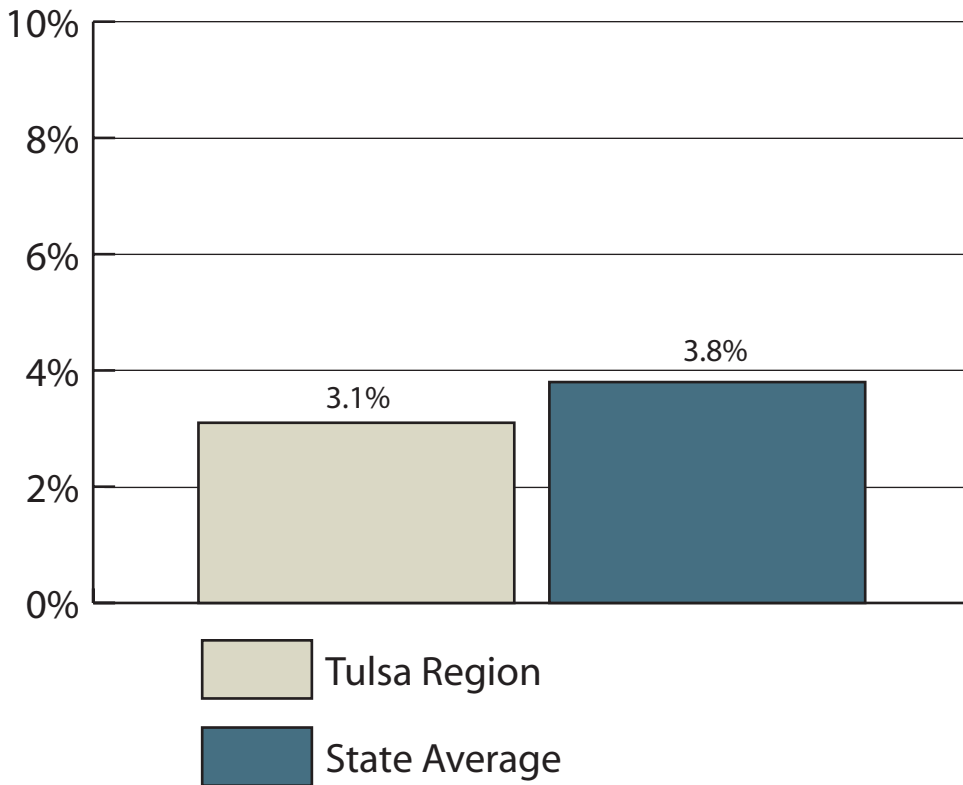
OIL & GAS CLUSTER ANALYSIS

2004 REGIONAL DISTRIBUTION OF JOBS

County	Number of Jobs
Creek	699
Osage	478
Pawnee	146
Tulsa	9,653
Total	10,976



PERCENT OF JOBS IN CLUSTER



LARGEST SUB-CLUSTERS

NAICS	Sub-Cluster	Number of Employees
221210	Natural Gas Distributor	3,888
211111	Crude Petroleum & Natural Gas Extraction	3,046
333132	Oil & Gas Field Machinery & Equipment Manufacturing	1,409
324110	Petroleum Refineries	758
213112	Support Activities for Oil & Gas Operation	698

EMPLOYMENT TRENDS

Indicator	Jobs
Net Change in Job Volume between 2002 and 2004 in the Tulsa Region	-192
Statewide Projected Change in Cluster Employment between 2002 and 2012	+1.73%

MAJOR EMPLOYERS

Twelve employers in the oil & gas cluster in the Tulsa region have over 200 employees.

AVERAGE WAGE COMPARISONS

