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ECONOMIC CONDITIONS AND TRENDS IN RURAL OKLAHOMA (8th Edition)

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ABSTRACT

This paper provides a comprehensive overview of the economic conditions of rural Oklahoma. Information provided includes population, employment, income, and retail sales. Trends are examined for the state, including metropolitan and non-metropolitan portions, as well as for the four service districts of the Oklahoma Cooperative Extension Service.

ECONOMIC CONDITIONS AND TRENDS
IN RURAL OKLAHOMA

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ECONOMIC CONDITIONS AND TRENDS IN RURAL OKLAHOMA

INTRODUCTION

From September to December 2002, over 2,700 Oklahoma citizens from all 77 counties in the state attended an Oklahoma Community Listening Session sponsored by the Oklahoma Cooperative Extension Service. At each of these sessions the following guiding question was posed: *"Considering the next 3 to 5 years, what are the critical issues in your community and in Oklahoma that need to be addressed to realize a positive future for you, your family, and your community?"* When the responses were considered, one category of issues rose to the top: "Community and Economic Development." This issue was mentioned in 75 of the 77 counties. Basically, only Tulsa and Oklahoma Counties failed to identify this as a major concern (OCES, 2003).

In a summary of Listening Session results published in June 2003, Community and Economic Development was divided into four subcategories: Business Development, Community Development, Agricultural Development, and Tourism. Of these four, Business Development was mentioned the most often—70 counties. Community Development was mentioned in 67 counties. By contrast, Agricultural Development was mentioned 29 times, and Tourism was mentioned 15 times. Residents from Washita County said it well when they indicated a need for a "higher pay scale and better paying jobs [to] keep young people in the community after college." This sentiment was typical among the counties.

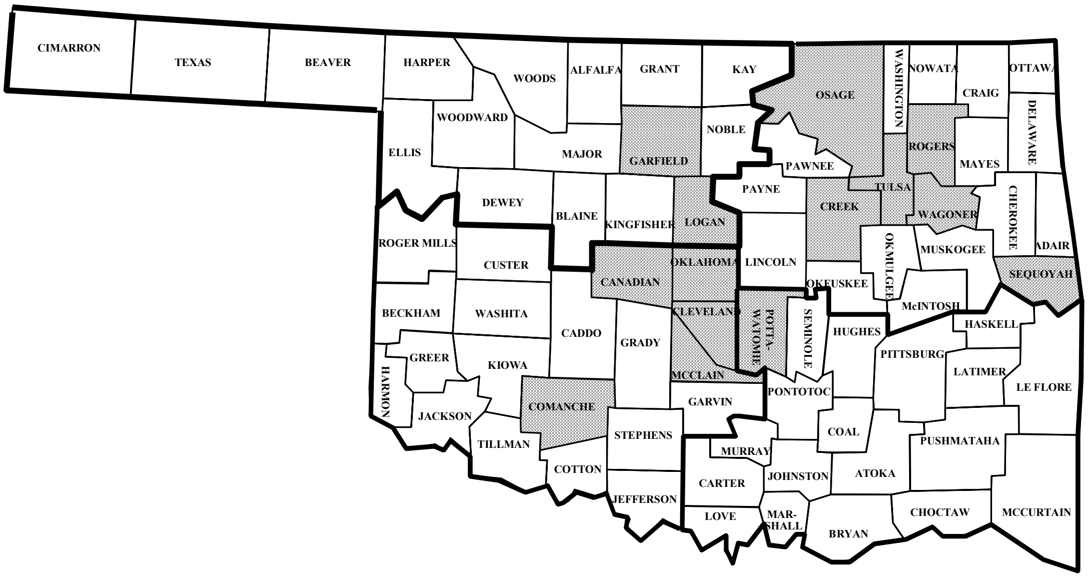
Clearly, Oklahoma residents are concerned about the sustainability of their local economies. They are concerned about low incomes, lack of employment opportunities, and the loss of their educated young adults to more lucrative cities—especially out-of-state. Unfortunately, so far, 2003 has not been a year to reverse the trends that are negatively impacting these rural economies. Forty counties lost population from 2000 to 2002, and plant closures and government downsizing have led to increased unemployment statewide. Furthermore, retail sales growth, at least so far, is still sluggish.

This report is designed to provide an overview of demographic and economic conditions and trends in Oklahoma. As reported in the previous edition of this report, the slow economy remains the number one trend for 2003, both in Oklahoma and nationwide, and this trend will manifest itself in the data presented in this edition of the report. Specifically, trends in population, employment, income and retail sales will be examined.

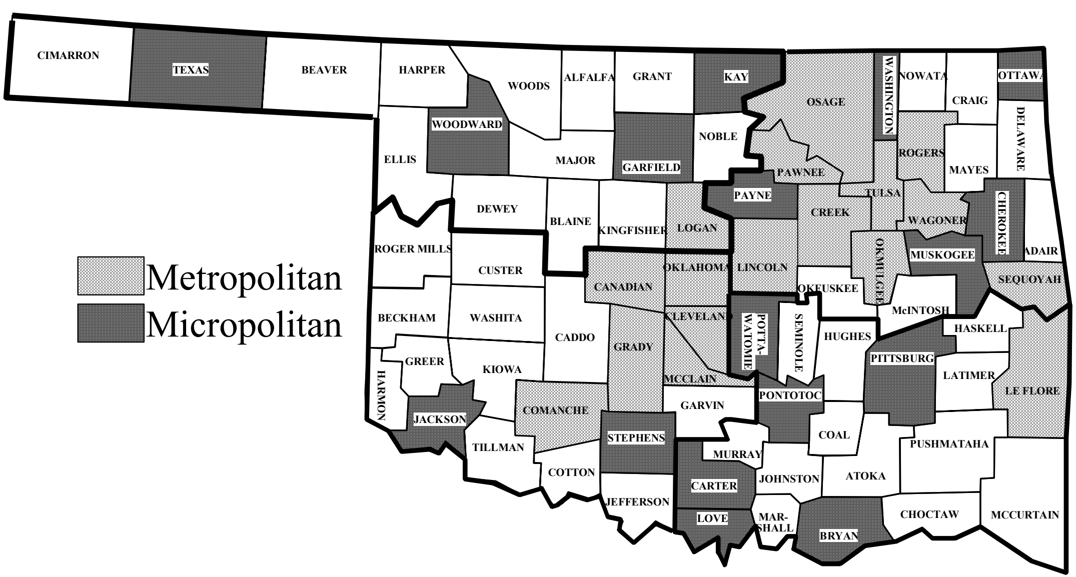
This is the eighth edition of this report on economic trends in rural Oklahoma. It was first published by the Oklahoma Cooperative Extension Service in December of 1996 and has been updated each year since. The report continues to examine the economic trends for the state as a whole and provide a comparison between metropolitan and non-metropolitan portions of Oklahoma. This comparison became more difficult this year as the Office of Management and Budget released its new definitions of "Metropolitan." The top half of Figure 1 shows the 14 metropolitan counties in Oklahoma based on the 1990 Census, or the "old definitions." The bottom half of Figure 1 shows the new designations, which are based on the 2000 Census. In addition to reassigning Metropolitan Counties, a new designation was introduced, the Micropolitan County. This is defined as a county with at least one major employment center with a population between 10,000 and 50,000. Based on the new definitions, Oklahoma now has 17 Metropolitan Counties, 17 Micropolitan Counties, and 43 non-classified counties.

This report will also examine the economic trends in the four service districts of the Oklahoma Cooperative Extension Service (OCES). These districts are basically the four quadrants of the state: northeast, northwest, southeast, and southwest. Only data for the non-metropolitan counties in each of the four districts are reported. (Because of the new definitions, non-metropolitan would include both non-classified counties and Micropolitan Counties.) Detailed data for all counties by district are provided in the companion to this report, ***Appendixes Containing Detailed Data Tables for Economic Conditions and Trends in Rural Oklahoma***.

Figure 1.
"Old" Metropolitan Counties of Oklahoma
Based on 1990 Population



"New" Metropolitan Counties of Oklahoma
Based on 2000 Population



Source: Office of Management and Budget, Released June 2003

STATE, METROPOLITAN, AND NON-METROPOLITAN ECONOMIC CONDITIONS AND TRENDS

The first section of this report examines the economic conditions and demographic trends in Oklahoma. Conditions in the metropolitan counties of the state are compared to those in the remaining counties. This type of comparison highlights the contrasts that exist between the "metro" and "rural" parts of the state. Recall that the definitions for “metropolitan” have recently changed. Because of this, many of the economic and demographic indicators presented in this section of the report will be shown for both the “old definition” and the “new definition.” A later section will examine economic trends in the four OCES districts, specifically the northeast, northwest, southeast, and southwest regions of the state.

Population Trends

In 1990, the population of the state of Oklahoma was 3,145,576. (See Table 1a and Figure 2.) Approximately 59 percent of the population lived in metropolitan counties, while 41 percent lived in non-metropolitan counties. (See Table 1b.) By 2000, the state's population had increased to 3,450,654--a 9.7 percent increase from 1990, and the portion living in metro areas (based on old definitions) increased to nearly 61 percent (60.81%). When the new metropolitan definitions are applied to 2000 population, close to 63 percent (62.51%) of the population is shown to reside in metropolitan areas. In 2002, the percentage is even larger at 63.0 percent. Also in 2002, another 20.5 percent of the population lived in micropolitan counties. This leaves just 16.5 percent of the population in the most rural, non-classified areas.

From 2000 to 2002, the state's population increased by an estimated 1.3 percent to 3,493,700. Even for just two years, the trend was still for population to grow faster in metropolitan portions of the state than in non-metropolitan portions (new definitions). This is shown in Figures 2 and 3. From 2000 to 2002 population in metropolitan counties increased by 2.0 percent and population in micropolitan counties increased by 0.4 percent. The non-classified counties saw their population decline by –0.6 percent.

Table 1a
Total Population

	1990	2000	2002	% Change 1990-2000	% Change 2000-02
State of Oklahoma	3,145,576	3,450,654	3,493,700	9.70%	1.25%
[1]Old Metropolitan Areas	1,869,842	2,098,362	2,140,700	12.22%	2.02%
[2]Old Non-Metropolitan Area	1,275,734	1,352,292	1,353,000	6.00%	0.05%
[3]New Metropolitan Areas	na	2,157,030	2,200,800	na	2.03%
[4]Micropolitan Areas	na	714,062	716,700	na	0.37%
[5]Non-Classified Areas	na	579,562	576,200	na	-0.58%

Table 1b
Population as a Percent of State Total

	1990	2000	2002
State of Oklahoma	100%	100%	100%
Old Metropolitan Areas	59.44%	60.81%	61.27%
Old Non-Metropolitan Areas	40.56%	39.19%	38.73%
New Metropolitan Areas	na	62.51%	62.99%
Micropolitan Areas	na	20.69%	20.51%
Non-Classified Areas	na	16.80%	16.49%

[1] The “old” metropolitan designations are based on the 1990 Census and include 14 counties in Oklahoma.
[2] The “old” non-metropolitan counties are based on the 1990 Census and include the 63 counties not designated as metropolitan.
[3] Just released by the Office of Management and Budget in June of 2003, the “new” metropolitan designations are based on the 2000 Census and include 17 Oklahoma counties.
[4] Micropolitan counties are a completely new designation. These counties have one major city with population between 10,000 and 50,000. Oklahoma has 17 micropolitan counties.
[5] Counties that are neither metropolitan nor micropolitan are now referred to as non-classified. This would include 43 counties in Oklahoma.
na: Not applicable. It would not be appropriate to calculate populations for the new designations for 1990 since the “new” definitions are based on 2000 population.

Source: U.S. Census Bureau (www.census.gov)

Table 2a
Population by Age Categories

	1990		2000		2002		% Change 1990-2000		% Change 2000-2002	
	65 & Over	Under 15	65 & Over	Under 15	65 & Over	Under 15	65 & Over	Under 15	65 & Over	Under 15
State of Oklahoma	424,408	706,685	455,950	732,907	460,459	721,347	7.43%	3.71%	0.99%	-1.58%
Old Metropolitan Areas	210,928	425,846	243,869	453,847	250,243	453,186	15.62%	6.58%	2.61%	-0.15%
Old Non-Metropolitan Area	213,480	280,839	212,081	279,060	210,216	268,161	-0.66%	-0.63%	-0.88%	-3.91%
New Metropolitan Areas	na	na	245,082	459,131	257,269	466,242	na	na	4.97%	1.55%
Micropolitan Areas	na	na	107,003	146,271	106,558	142,372	na	na	-0.42%	-2.67%
Non-Classified Areas	na	na	103,865	127,505	96,632	112,733	na	na	-6.96%	-11.59%

Table 2b
Percent of Each Geographic Area that is in Each Age Group

	1990		2000		2002	
	65 & Over	Under 15	65 & Over	Under 15	65 & Over	Under 15
% of State of Oklahoma	13.49%	22.47%	13.21%	21.24%	13.18%	20.65%
% of Old Metropolitan Areas	11.28%	22.77%	11.62%	21.63%	11.69%	21.17%
% of Old Non-Metropolitan Area	16.73%	22.01%	15.68%	20.64%	15.54%	19.82%
% of New Metropolitan Areas	na	na	11.36%	21.29%	11.69%	21.19%
% of Micropolitan Areas	na	na	14.93%	20.41%	14.87%	19.86%
% of Non-Classified Areas	na	na	18.03%	22.13%	16.77%	19.56%

Source: U.S. Census Bureau (www.census.gov)

Figure 2. Population of Oklahoma, 1980, 1990 & 2000, State, Metropolitan and Non-metropolitan Areas (Old Definitions)

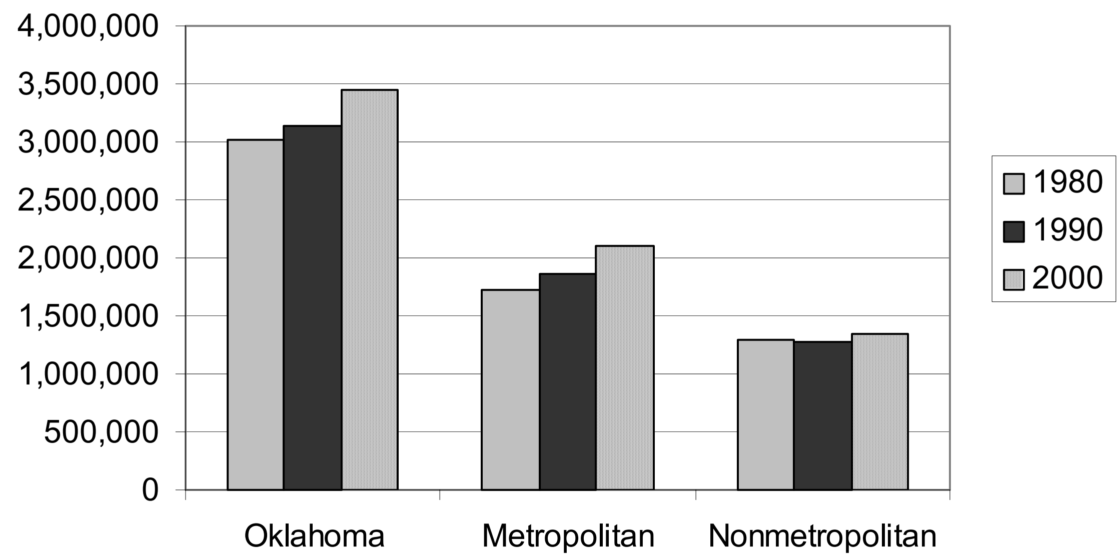
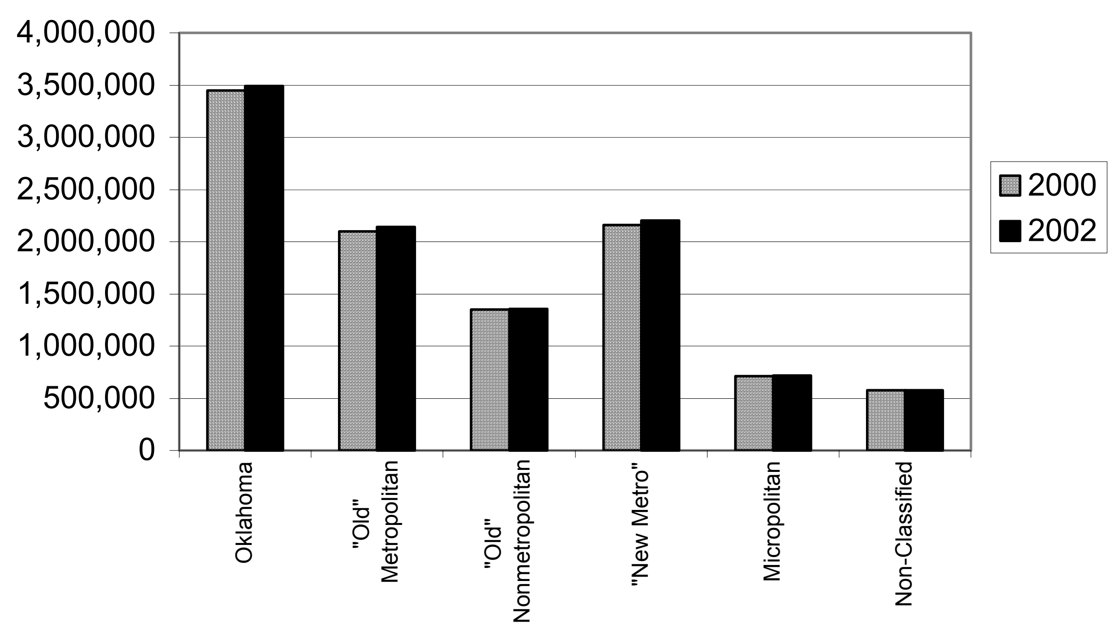


Figure 3. Population of Oklahoma, 2000 and 2002 State, Metropolitan and Non-metropolitan Areas



Tables 2a and 2b contain population data that is age specific. In 1990, 13.49 percent of the state's population was aged 65 or over. By 2000, the percentage had declined a bit to 13.21. In 2002, 13.18 percent of the state's population was aged 65 and over. Essentially all of the population growth in the state, in terms of those aged 65 and over, has taken place in metropolitan areas. The growth rate from 1990 to 2000 in metropolitan areas of those 65 and over was 15.6 percent, compared to –0.7 percent in the non-metropolitan counties. Similarly, from 2000 to 2002, metropolitan areas (new definitions) showed increase of nearly 5 percent; micropolitan areas *decreased* by -0.4 percent and non-classified areas decreased by nearly –7.0 percent!

The population for those under age 15 is also examined in Tables 2a and 2b. For the state, the growth rate for this demographic group was 3.7 percent from 1990-2000. For this time frame all the growth occurred, once again, in the metropolitan counties. The non-metropolitan counties experienced negative growth of their youth population during the time span, decreasing by –0.6 percent from 1990-2000. A similar pattern holds for 2000 to 2002 when micropolitan areas saw this age group decline by –2.7 percent and non-classified areas saw decline of –11.6 percent. While metro Oklahoma (new definition) did see its under 15 population grow by 1.6 percent from 2000 to 2002, the significant loss of population for non-metro areas caused the state's total to decline by -1.6 percent for the 2 years.

The fraction of the state's population that is younger than 15 has also been declining since 1990. In that year, 22.5 percent of the state's population was less than 15 years of age. In 2000, 21.2 percent was less than 15. By 2002, the fraction was down to 20.7 percent. This is a trend that holds true for both metro and non-metro portions of the state.

Labor Force and Employment Trends

Labor force data from the Oklahoma Employment Security Commission (OESC) are located in Figure 4 and indicate that total employment in the state was 1,616,783 in 2002. This represents a 13.2 percent increase from 1990. For graphical purposes, employment data for metropolitan and non-metropolitan areas are presented using "old" definitions. This is done so that trends may be shown over time. Thus, in metropolitan areas, total employment was 1,043,294 in 2002--an increase of 16.0 percent from 1990. Employment in non-metro areas increased at a slower rate of 8.5 percent. Total employment in non-metropolitan counties equaled 573,516 in 2002; therefore, 35.5 percent of the state's total employment was located in non-metro counties, which contain about 39 percent of the state's population. (Again, this information is based on the "old" metro definitions.)

Figure 5 presents unemployment rates, as calculated from OESC labor force data, for the state, metropolitan areas, and non-metropolitan areas. As with the previous table, Table 5 is shown based on "old" metro definitions in order to continue the trend line. In 2000, all three areas show unemployment rates that are historical lows, but the rates all turn upward for 2001 and again for 2002. Non-metropolitan areas tend to have the highest rates of unemployment in the state, and metropolitan areas tend to have the lowest rates of unemployment in the state. All three areas consistently show the same cyclical pattern for their unemployment rates, but, interestingly, the gap between the areas has narrowed substantially in the last two years.

Table 3a presents employment by industry statistics from the Bureau of Economic Analysis (BEA) for the years 1995 to 2000. Another definitional change has complicated the presentation of employment data for 2001—the latest year available from BEA. In the years prior to 2001, the BEA presented industries based on the Standard Industrial Classification (SIC) codes, but in 2001, industries were based on the North American Industrial Classification System (NAICS). There is no bridge between the two definitions. Even categories that have the same title in 2000 and 2001, such as "Retail Trade" are not the same. Data for 2000 and before <u>cannot</u> be compared to data for 2001. Thus the data will be presented in the following way. Employment data for 1995 to 2000 will be presented in Table 3a based on SIC industry definitions and "old" metro definitions. Data for 2001 is shown in Table 3b and is based on NAICS industry definitions and "new" metro definitions. Do not compare the data in the two tables.

According to Table 3a, the fastest growing sector statewide from 1995 to 2000 was Finance, Insurance and Real Estate (FIRE) with 25.5 percent growth. The FIRE sector was also an important source of growth in metro counties, but the fastest growing sector was actually transportation and public utilities (23.8 percent). Growth in FIRE employment also fueled growth in non-metro counties, increasing by at least 31.9 percent. The growth was probably more than that, but, unfortunately, some of the non-metro counties were unable to disclose their employment in this sector in 2000 due to confidentiality issues.

Statewide, mining jobs have taken a hit, declining by –11.4 percent from 1995 to 2000. Although wholesale trade has grown statewide by 6.5 percent, there is some indication that employment in this sector may have declined in non-metro Oklahoma. By exactly how much is not clear due to lack of disclosure.

Table 3b contains employment data by industry for 2001 using new industry definitions and new metropolitan definitions. Lack of disclosure at the sub-state level is an even more predominant problem because the new industries are now smaller. (The smaller the industry, the easier it would be to identify an individual employer.) Thus, statewide, the largest employer is "government and government enterprise" employing 334,338. In second place is "retail trade" with employment of 229,668 followed by "health care and social assistance" with employment of 178,516.

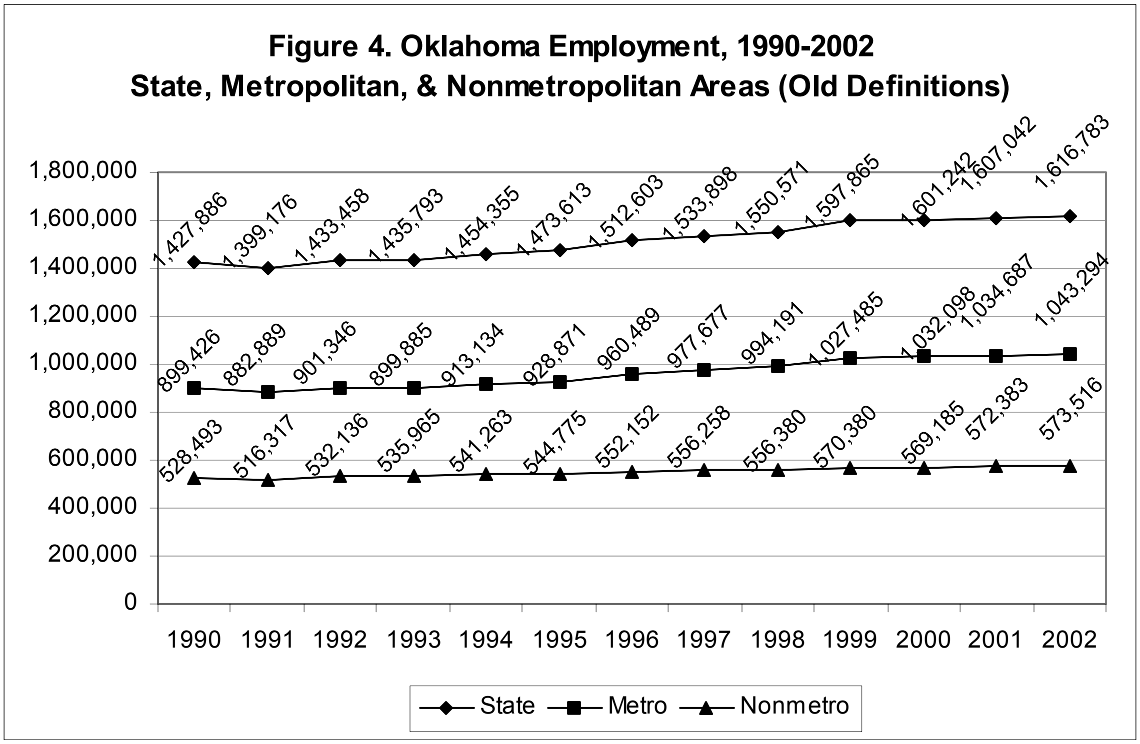


Figure 4. Oklahoma Employment, 1990-2002
State, Metropolitan, & Nonmetropolitan Areas (Old Definitions)
1,427,886
1,399,176
1,433,458
1,435,793
1,454,355
1,473,613
1,512,603
1,533,898
1,550,571
1,597,865
1,601,242
1,607,042
1,616,783
899,426
882,889
901,346
899,885
913,134
928,871
960,489
977,677
994,191
1,027,485
1,032,098
1,034,687
1,043,294
528,493
516,317
532,136
535,965
541,263
544,775
552,152
556,258
556,380
570,380
569,185
572,383
573,516
1,800,000
1,600,000
1,400,000
1,200,000
1,000,000
800,000
600,000
400,000
200,000
0
1990 1991 1992 1993 1994 1995 1996 1997 1998 1999 2000 2001 2002
State
Metro
Nonmetro

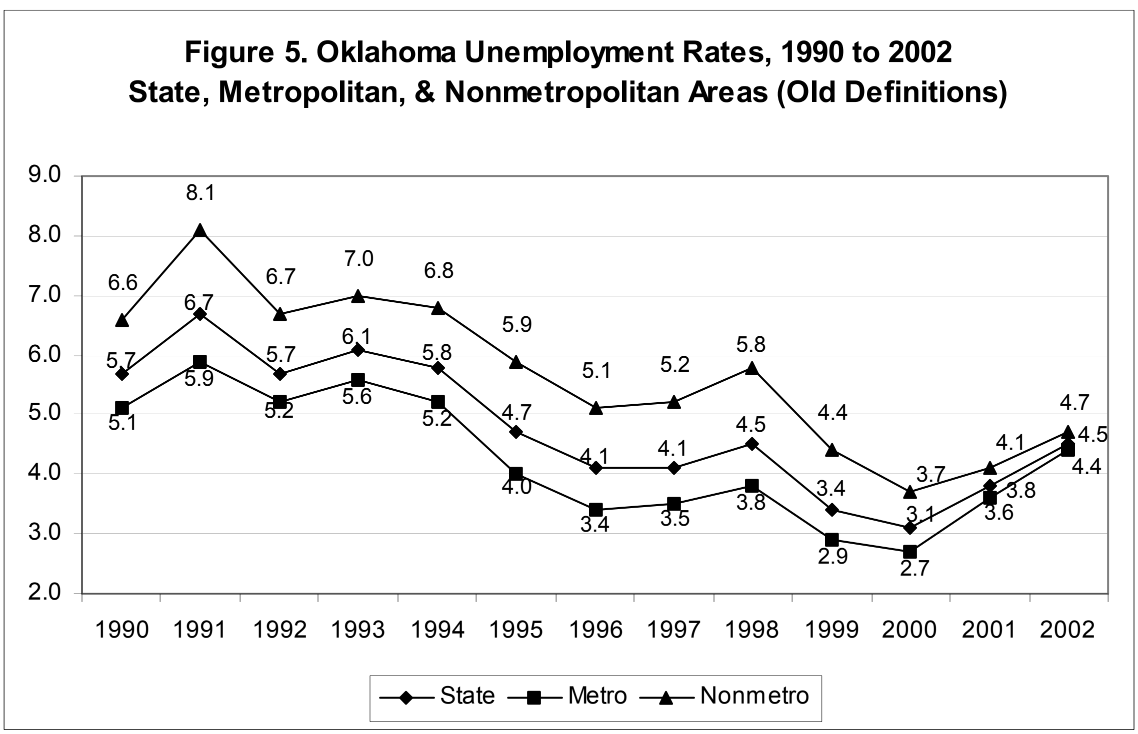


Figure 5. Oklahoma Unemployment Rates, 1990 to 2002
State, Metropolitan, & Nonmetropolitan Areas (Old Definitions)
9.0
8.0
7.0
6.0
5.0
4.0
3.0
2.0
6.6
8.1
6.7
7.0
6.8
5.9
5.1
5.2
5.8
4.4
3.7
4.1
4.7
5.7
6.7
5.7
6.1
5.8
4.7
4.1
4.1
4.5
3.4
3.1
3.8
4.5
5.1
5.9
5.2
5.6
5.2
4.0
3.4
3.5
3.8
2.9
2.7
3.6
4.4
1990 1991 1992 1993 1994 1995 1996 1997 1998 1999 2000 2001 2002
State
Metro
Nonmetro

Table 3a
Employment by Industry for State, Metropolitan, and Non-metropolitan Oklahoma (Old Definitions), 1995-2000
Industry Definitions Based on SIC Codes

	Oklahoma			Metropolitan Areas			Nonmetropolitan Areas		
	1995	2000	% Change 1995-00	1995	2000	% Change 1995-00	1995	2000	% Change 1995-00
Farm employment	93,184	98,536	5.74%	19,110	20,448	7.00%	74,074	78,088	5.42%
Ag. services, forestry, fishing, & other 3/	21,000	22,417	6.75%	10,951	†11,475	4.78%	10,049	(D)	(D)
Mining	62,804	55,650	-11.39%	35,905	†32,052	-10.73%	26,899	(D)	(D)
Construction	88,068	103,292	17.29%	57,477	69,043	20.12%	29,950	†32,033	6.95%
Manufacturing	178,810	189,743	6.11%	116,236	121,219	4.29%	62,544	68,524	9.56%
Transportation and public utilities	87,177	103,212	18.39%	61,550	76,172	23.76%	24,788	†25,694	3.65%
Wholesale trade	71,140	75,793	6.54%	53,816	57,613	7.06%	17,230	†16,832	-2.31%
Retail trade	309,328	335,928	8.60%	206,297	227,121	10.09%	103,031	108,807	5.61%
Finance, insurance, and real estate	103,525	129,917	25.49%	77,307	94,981	22.86%	26,092	†34,428	31.95%
Services	488,562	586,645	20.08%	347,826	425,472	22.32%	140,736	†145,123	3.12%
Government and government enterprises	311,344	321,665	3.31%	195,261	199,802	2.33%	116,083	121,863	4.98%
Total full-time and part-time employment	1,814,942	2,022,798	11.45%	1,181,736	1,336,404	13.09%	633,206	686,394	8.40%

† Because disclosures are avoided in some industries, some of the entries above may be less than actual. Those marked with (†) are less than actual.
(D) Not shown to avoid disclosure of confidential information, but the estimates for this item are included in the totals.

Source: Regional Economic Information Service, Bureau of Economic Analysis

Table 3b
Employment by Industry for State, Metropolitan, Micropolitan, and Non-Classified Oklahoma
(New Definitions), 2001[1]
Industry Definitions Based on NAICS Codes

2001	Oklahoma	Metropolitan	Micropolitan	Non-Classified
Total Full and Part Time Employment	2,041,281	1,353,705*	398,661*	288,915*
By Industry				
Farm employment	101,861	27,182*	26,514*	48,165*
Forestry, fishing, related activities, and other	8,430	1,352	432	486
Mining	54,117	28,482	11,604	8,669
Utilities	11,441	6,714	1,452	1,419
Construction	112,615	75,091*	20,095	12,994
Manufacturing	177,535	115,660*	33,538	21,439
Wholesale trade	63,367	46,480	10,050	5,213
Retail Trade	229,668	150,579*	47,854*	31,235*
Transportation and warehousing	58,271	41,355	7,861	4,559
Information	41,868	34,604*	4,404*	2,860*
Finance and insurance	81,728	59,772*	13,089	7,070
Real estate and rental and leasing	61,118	46,817*	9,110	4,286
Professional and technical services	90,331	67,672	8,847	5,088
Management of companies and enterprises	13,845	11,716	802	0
Administrative and waste services	126,631	98,466	17,984	4,413
Educational services	21,589	16,914	2,351	184
Health care and social assistance	178,516	119,407	22,062	11,501
Arts, entertainment, and recreation	27,209	19,228	4,457	1,753
Accommodation and food services	125,910	87,958	24,250	8,864
Other services, except public administration	120,893	77,397*	24,737*	18,759*
Government and government enterprises	334,338	206,015*	77,381*	50,942*

[1] Because data for 2001 is based on NAICS industry definitions, it is not comparable to data from previous years, which is based on SIC definitions.

* State totals are complete, but most of the other subtotals are incomplete due to a lack of disclosure. Only those sub-state entries marked with an asterisk (*) are complete. Thus, sub-state totals will not sum to state totals in most cases.

Total Personal Income and Per Capita Income

According to the Bureau of Economic Analysis (BEA), total personal income for the state was more than $86.5 billion in 2001. (Refer to Figure 6.) That represented a 30.6 percent increase from 1996. In order to continue using trend lines, old metropolitan definitions were used in Figures 6 and 7. In light of that, about 68.4 percent of the state's total income accrued to the metropolitan counties, and total income in those counties equaled $59.2 billion in 2001—a 33.6 percent increase from 1996. Less than one-third of the state's total income was earned in rural portions of the state—amounting to $27.4 billion. Income in the non-metropolitan counties increased by about 24.5 percent since 1996.

Figure 7 illustrates that per capita income in the state has risen from $19,846 in 1996 to $24,945 in 2001. With a per capita income of $20,261 in 2001, the rural areas of Oklahoma have a PCI that is 81.2 percent that of the state's and just 72.5 percent of the metro counties'. The rural counties fared slightly better back in 1996, when PCI was 83.6 percent of the state average and 75.4 percent of the metro average. The low PCI in rural Oklahoma has been the topic of much discussion for many years, but instead of improving, the non-metropolitan counties have actually lost ground since 1996.

Total personal income by major source is presented in Table 4 for the state of Oklahoma, metropolitan counties, and non-metropolitan counties for the years 1996 and 2001. (Old metro definitions were used in this table, but both old and new definitions will be shown for this type of data in a later section.) The largest source of personal income is wage and salary disbursements. From 1996 to 2001 this source increased by 32.3 percent for the state. Notice that adjustments for residence are negative in metropolitan counties and positive in rural counties. The negative adjustment for residence in the metro counties means that workers earn income in these counties but take the money with them when they commute home to other counties. Since two-thirds of the state's jobs are in the metro counties, it makes sense that people are commuting to these counties to work. Conversely, the adjustment for residence in non-metropolitan counties is expected to be positive as residents bring home their paychecks earned in the metro counties. Transfer payments are also shown in Table 4. Transfer payments were greater to metropolitan counties, and grew at a faster rate than in non-metropolitan counties. In 1996, 54 percent of all transfer payments in the state went to the metropolitan counties. That fraction increased to 56.5 percent in 2001.

Transfer payments are typically thought of as "welfare payments." Actually, only a small portion of transfer payments consists of what most people consider welfare. Table 5 presents transfer payments by category. For the state of Oklahoma, income maintenance benefits, which include food stamps, family assistance, and Supplemental Security Income, only accounted for about 8.6 percent of all transfer payments in 2001. For metropolitan Oklahoma, the fraction was 7.9 percent, and for non-metropolitan Oklahoma it was 9.5 percent. Retirement and disability insurance is the largest category of transfer payments for the state. Medical payments are the second largest category for all areas. Indicative of the growing unemployment rates statewide, the fastest growing category from 1996 to 2001 for metro areas and for the state overall is unemployment insurance payments. Federal training and education assistance is the fastest growing category in the non-metropolitan counties. In 2001, transfer payments composed 16.02 percent of the state's total personal income, compared to 13.24 percent for metro areas and 22.04 percent for non-metro areas. The non-metro areas do tend to have a stronger reliance on transfer payments to supplement personal income.

Figure 6. Total Personal Income, 1996-2001, State, Metropolitan, & Nonmetropolitan-Old Definitions (In Billion $)

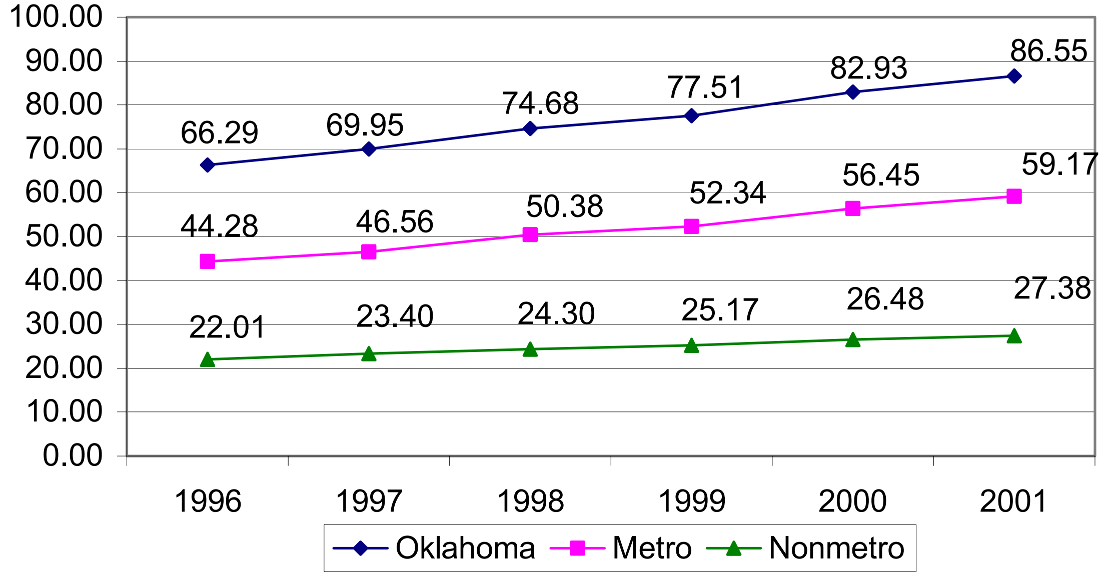


Figure 7. Per Capita Income, 1996-2001, State, Metropolitan, and Nonmetropolitan - Old Definitions

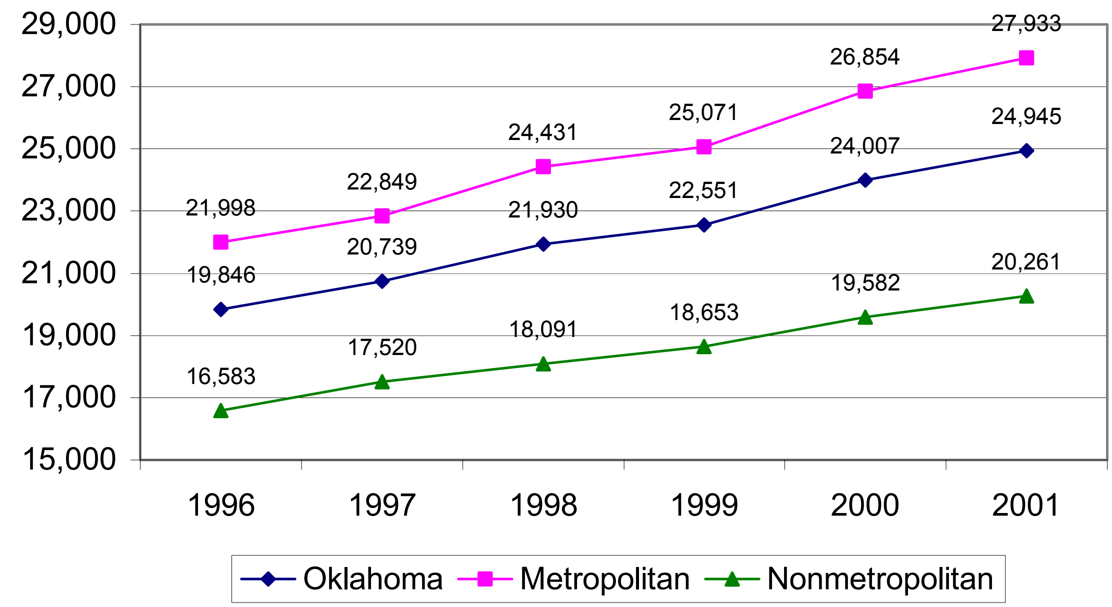


Table 4
Total Personal Income by Major Source
Old Metro Definitions
(Thousands of Dollars)

	Oklahoma			Metropolitan Areas			Nonmetropolitan Areas		
	1996	*2001*	*% Change 1995-2000*	*1996*	*2001*	*% Change 1996-2001*	*1996*	*2001*	*% Change 1996-2001*
Earnings by Place of Work	45,320,875	59,936,900	32.25%	33,080,201	44,499,077	34.52%	12,240,674	15,437,823	26.12%
Wage & salary disbursements	33,345,159	43,766,192	31.25%	24,486,612	32,514,061	32.78%	8,858,547	11,252,131	27.02%
Proprietors' income	6,692,601	10,002,007	49.45%	3,863,327	4,469,008	15.68%	1,419,788	1,699,693	19.71%
Other labor income	5,283,115	6,168,701	16.76%	4,730,262	7,516,008	58.89%	1,962,339	2,485,999	26.69%
Plus: Adjustment for residence	745,264	934,297	25.36%	-503,473	-609,008	20.96%	1,248,737	1,543,305	23.59%
Plus: Dividends, interest, rent	11,991,802	15,350,828	28.01%	7,764,439	10,100,124	30.08%	4,227,363	5,250,704	24.21%
Plus: Transfer payments	10,967,139	13,869,065	26.46%	5,935,105	7,836,605	32.04%	5,032,034	6,032,460	19.88%
Less: Personal cont. for social insurance	2,736,447	3,541,501	29.42%	1,997,574	2,653,484	32.84%	738,873	888,017	20.19%
Total Personal Income ($000)	66,288,633	86,549,589	30.56%	44,278,698	59,173,314	33.64%	22,009,935	27,376,275	24.38%

Source: Regional Economic Information Service, Bureau of Economic Analysis

Table 5
Transfer Payments
Old Metro Definitions
(Thousands of Dollars)

	Oklahoma			Metropolitan Areas			Non-metropolitan Areas		
	1996	2001	% Change 1996-01	1996	2001	% Change 1996-01	1996	2001	% Change 1996-01
Ret. & disab. insurance benefit payments	4,813,294	5,725,008	18.94%	2,649,684	3,206,447	21.01%	2,163,610	2,518,561	16.41%
Medical payments	3,771,905	5,198,255	37.82%	1,989,617	2,996,788	50.62%	1,782,288	2,201,467	23.52%
Income maintenance benefit payments	1,060,646	1,190,578	12.25%	550,727	617,191	12.07%	509,919	573,387	12.45%
Unemployment insurance benefit payments	124,903	200,822	60.78%	72,340	131,043	81.15%	52,563	69,779	32.75%
Veterans benefit payments	513,960	639,860	24.50%	277,032	351,180	26.77%	236,928	288,680	21.84%
Fed educ. & trng. asst. pay. (excl. vets)	135,092	199,106	47.39%	70,313	101,849	44.85%	64,779	97,257	50.14%
Other payments to individuals	27,234	28,188	3.50%	13,655	15,308	12.11%	13,579	12,880	-5.15%
Payments to nonprofit institutions	290,317	398,011	37.10%	174,009	241,385	38.72%	116,308	156,626	34.66%
Business payments to individuals	229,788	289,237	25.87%	137,728	175,414	27.36%	92,060	113,823	23.64%
Total transfer payments ($000)	10,967,139	13,869,065	26.46%	5,935,105	7,836,605	32.04%	5,032,034	6,032,460	19.88%
Total Transfers as a Percent of Total Personal Income	16.54%	16.02%	---	13.40%	13.24%	---	22.86%	22.04%	---

Source: Regional Economic Information System

Trends in Retail Sales

Figure 8 shows *sales subject to sales tax*, or retail sales, for fiscal years 1993-2003 for the state of Oklahoma, as well as for metro versus non-metro portions of the state (old definitions.) This information is available from the online database ORIGINS (http://origins.ou.edu) and is calculated using data from the Oklahoma Tax Commission. For the state, sales subject to sales tax increased from $21.18 billion in FY 1993 to $31.04 billion in FY 2001—an increase of 46.3 percent. Sales have dropped for FY 2002 ($30.94 billion) and again for FY2003 ($30.78 billion). In FY 2003, the volume of retail sales in metro areas totaled $22.5 billion, or 73.1 percent of the state total. The remaining 26.9 percent—or $8.29 billion—took place in non-metro areas of the state. From FY 1993 to FY 2003, retail sales increased by 47.3 percent in metro Oklahoma and by 40.5 percent in rural Oklahoma.

In FY 1993, per capita retail sales (average retail dollars spend per person) averaged $6,559 for the state, $7,871 for metro areas, and $4,582 for non-metro areas. In FY 2003, per capita retail sales totaled $8,811 for the state, $10,509 for metro areas, and $6,124 for non-metro areas (old definitions.) The widening gap between retail sales in metro areas and retail sales in non-metro areas has a tremendous implication for rural communities. For many small communities, sales tax collections on retail sales (often groceries) represent a large source of municipal income. Loss of funding means reduced provision of services, which gives local residents further reason to move toward the metropolitan areas. It is something of a vicious cycle for these troubled towns.

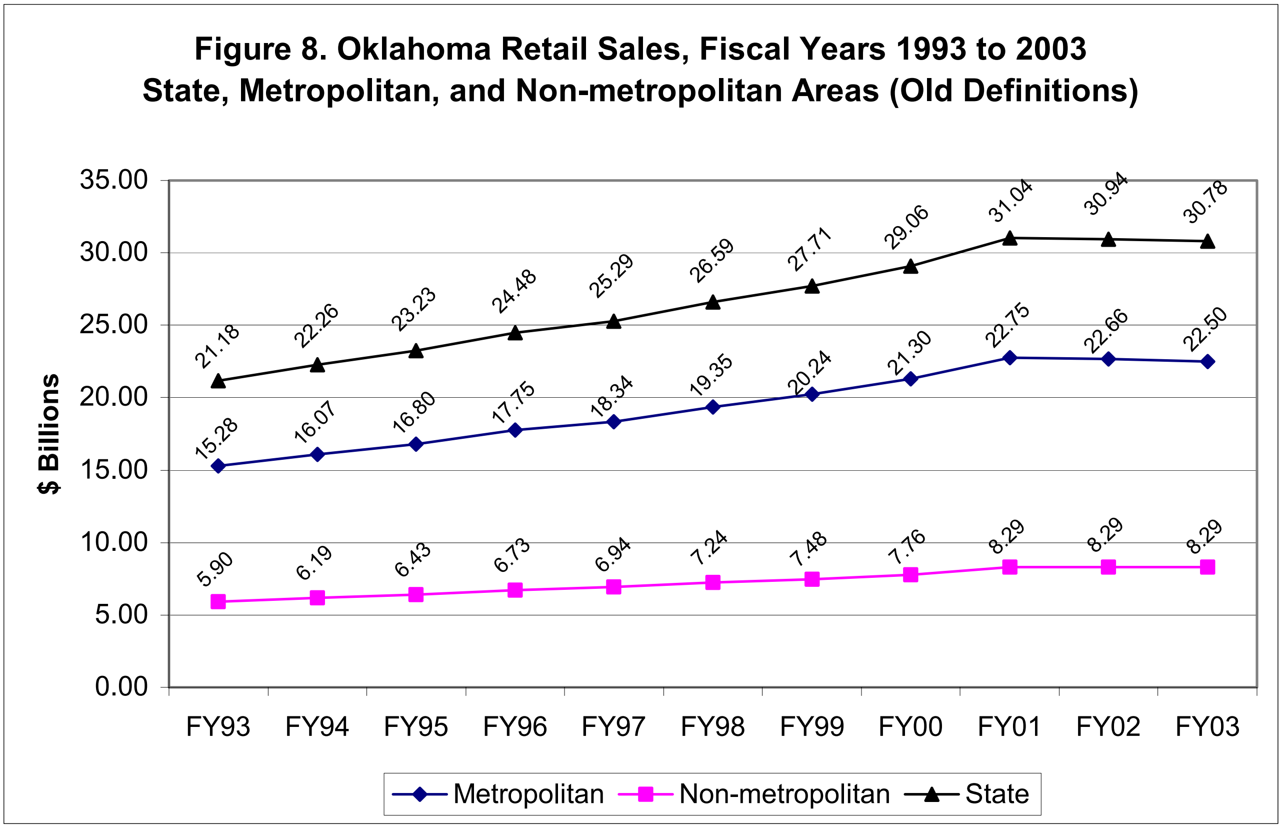
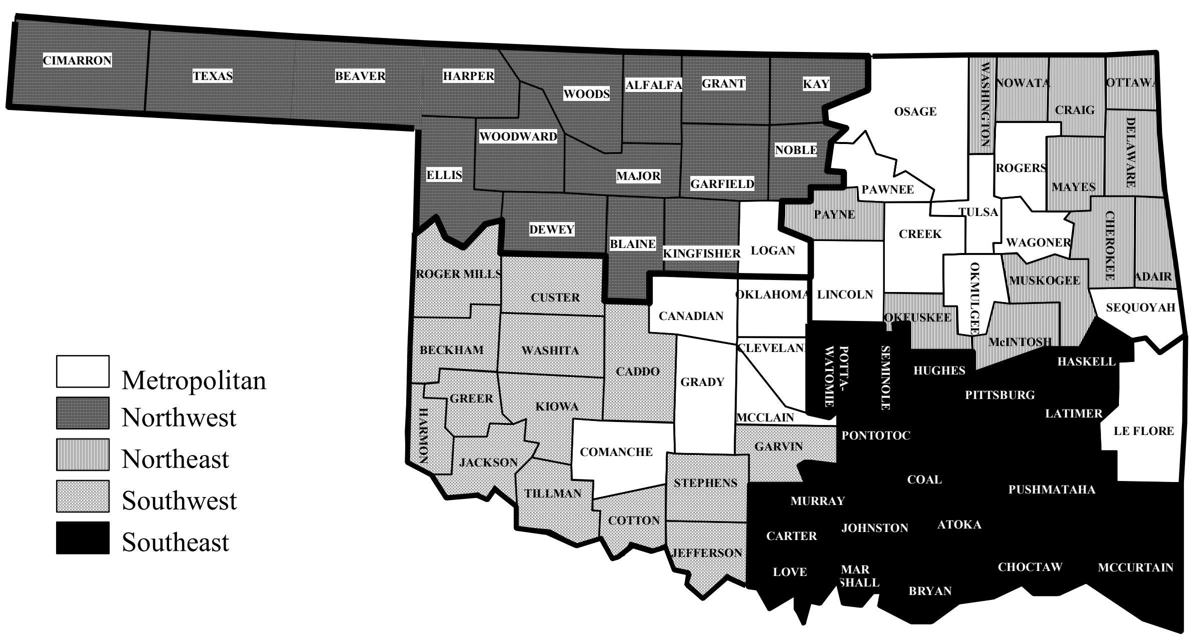


Figure 8. Oklahoma Retail Sales, Fiscal Years 1993 to 2003
State, Metropolitan, and Non-metropolitan Areas (Old Definitions)
$ Billions
35.00
30.00
25.00
20.00
15.00
10.00
5.00
0.00
FY93
FY94
FY95
FY96
FY97
FY98
FY99
FY00
FY01
FY02
FY03
21.18
22.26
23.23
24.48
25.29
26.59
27.71
29.06
31.04
30.94
30.78
15.28
16.07
16.80
17.75
18.34
19.35
20.24
21.30
22.75
22.66
22.50
5.90
6.19
6.43
6.73
6.94
7.24
7.48
7.76
8.29
8.29
8.29
Metropolitan
Non-metropolitan
State

ECONOMIC CONDITIONS AND TRENDS IN THE FOUR OCES DISTRICTS

This section of the report examines the economic conditions and trend in the four service districts of the Oklahoma Cooperative Extension Service (OCES). This allows local community groups to gain a better understanding of economic situations in their regions. A map of the four OCES district boundaries is provided in Figure 9. The boundaries divide the state almost along the major interstates, and thus clearly denote four quadrants: Northeast, Northwest, Southeast, and Southwest. Only data for the non-metropolitan counties in each of the four districts are reported in district totals. New metro definitions are used for Figure 9 and data for both sets of definitions will be presented whenever applicable.

Figure 9. Oklahoma Cooperative Extension Service Districts



Population Trends

See Table 6a for total population trends for the state and the OCES service districts. For example, from 1990 to 2000, the state's population increased by 9.7 percent. During the same time frame, population increased in all of the four OCES service districts, but growth was definitely fastest in the Northeast district at a rate of 10.6 percent. The non-metropolitan counties of the Southeast district were next with a growth rate of 6.8 percent. The Northwest and Southwest districts had less than one percent growth for the decade.

The state's population increased 1.25 percent from 2000 to 2002. The Northeast and Southeast districts showed positive growth for the two years. This is true when using either old metro definitions or new ones. The Northeast still had the largest growth (1.12% - new definition). The two western districts both showed negative growth for the two years (either definition).

In 1990, 40.6 percent of the population lived in non-metropolitan portions of the state (Table 6b). Of that 40.6 percent, 14.5 percent lived in the Northeast district, 11.8 percent lived in the Southeast district, 8.8 percent lived in Southwest district, and 5.5 percent lived in the Northwest district. Based on old metro definitions, in 2000, 39.2 percent of the state's population lived in non-metropolitan counties (or 37.5% based on new definitions). Of that 39.2 percent, the largest portion (14.6%) continued to live in the Northeast district, while 11.5 percent lived in the Southeast district, 8.1 percent lived in the Southwest district, and 5.0 percent lived in the Northwest district. In 2002, 38.7 percent of the state's population lived in non-metropolitan counties (old definitions). Of that amount, 4.9 percent lived in the Northwest district, 14.6 percent lived in the Northeast district, 7.9 percent lived in the Southwest district, and 11.4 percent lived in the Southeast district.

Table 6a
Total Population By OCES District[1]

	1990	2000	2002	% Change 1990-2000	% Change 2000-02
State of Oklahoma	3,145,576	3,450,654	3,493,700	9.70%	1.25%
Old Definitions[2]					
Northeast District	455,825	504,002	509,200	10.57%	1.03%
Northwest District	171,876	173,254	171,400	0.80%	-1.07%
Southeast District	372,027	397,364	397,900	6.81%	0.13%
Southwest District	276,006	277,672	274,500	0.60%	-1.14%
Total Non-Metro	1,275,734	1,352,292	1,353,000	6.00%	0.05%
New Definitions					
Northeast District		415,625	420,300		1.12%
Northwest District		231,067	228,600		-1.07%
Southeast District		414,776	416,200		0.34%
Southwest District		232,156	227,800		-1.88%
Total Non-Metro		1,293,624	1,292,900		-0.06%

[1] Metropolitan counties within the districts' boundaries are excluded from district totals.

[2] The following are the changes to the districts under the new metropolitan designations.
NE: Lincoln, Pawnee, and Okmulgee Counties are now designated "metropolitan", thus the data for these counties will not be included in district totals.

NW: Garfield County is no longer a metropolitan county, thus data for this county will be now be included in the district totals.

SE: Pottawatomie County is no longer a metropolitan county, thus data for this county will now be included in the district totals. Also, LeFlore County is now designated "metropolitan", thus the data for this county will no longer be included in district totals.

SW: Grady County is now designated "metropolitan", thus the data for this county will no longer be included in district totals.

Table 6b
District Population as a Percent of State Total

	1990	2000	2002
State of Oklahoma	100%	100%	100%
Old Definitions			
Northeast District	14.49%	14.61%	14.57%
Northwest District	5.46%	5.02%	4.91%
Southeast District	11.83%	11.52%	11.39%
Southwest District	8.77%	8.05%	7.86%
Total Non-Metro	40.55%	39.20%	38.73%
New Definitions			
Northeast District		12.04%	12.03%
Northwest District		6.70%	6.54%
Southeast District		12.02%	11.91%
Southwest District		6.73%	6.52%
Total Non-Metro		37.49%	37.01%

Table 7a
Population by Age Categories

	1990		2000		2002		% Change 1990-2000		% Change 2000-2002	
	65 & Over	Under 15	65 & Over	Under 15	65 & Over	Under 15	65 & Over	Under 15	65 & Over	Under 15
State of Oklahoma	424,408	706,685	455,950	732,907	460,459	721,347	7.43%	3.71%	0.99%	-1.58%
Old Definitions										
Northeast District	72,203	98,117	75,439	103,078	75,738	100,444	4.48%	5.06%	0.40%	-2.56%
Northwest District	30,146	38,626	27,116	34,124	27,823	33,501	-10.05%	-11.66%	2.61%	-1.83%
Southeast District	64,207	81,217	63,569	82,455	63,233	79,489	-0.99%	1.52%	-0.53%	-3.60%
Southwest District	46,924	62,879	45,957	59,403	43,422	54,728	-2.06%	-5.53%	-5.52%	-7.87%
New Definitions										
Northeast District			62,520	83,698	62,929	81,833			0.65%	-2.23%
Northwest District			36,378	45,934	37,046	45,040			1.84%	-1.95%
Southeast District			65,968	85,934	65,713	83,088			-0.39%	-3.31%
Southwest District			39,999	49,494	37,502	45,145			-6.24%	-8.79%

Table 7b
Percent of Each Geographic Area that is in Each Age Group[1]

	1990		2000		2002	
	65 & Over	Under 15	65 & Over	Under 15	65 & Over	Under 15
% of State of Oklahoma	13.49%	22.47%	13.21%	21.24%	13.18%	20.65%
Old Definitions						
Northeast District	15.84%	21.53%	14.98%	20.45	14.87%	19.73%
Northwest District	17.54%	22.47%	15.65%	19.70	16.23%	19.55%
Southeast District	17.26%	21.83%	16.00%	20.75	15.89%	19.98%
Southwest District	17.00%	22.78%	16.55%	21.39	15.82%	19.94%
New Definitions						
Northeast District			15.04%	20.14%	14.97%	19.47%
Northwest District			15.74%	19.88%	16.21%	19.70%
Southeast District			15.90%	20.72%	15.79%	19.96%
Southwest District			17.23%	21.32%	16.46%	19.82%

[1] For example: In 1990, 15.84% of the Northeast District's population was aged 65 and over.

Tables 7a and 7b also examine the population in the four OCES districts based on age distribution. For example, Table 7a shows that, statewide, the population for those 65 and over increased by 7.4 percent from 1990 to 2000, yet the Northeast district was the only district to show positive growth for this component of the population. The growth occurred primarily in the metropolitan counties. From 2000 to 2002 statewide growth in the over 65 population equaled almost 1.0 percent. Using either the old or the new definitions of metro, the Northeast and the Northwest districts posted some growth, while the Southeast and the Southwest both declined for the two years. The decline was most significant in the Southwest.

For the under 15 component of the population, statewide growth equaled 3.7 percent from 1990 to 2000. Both the Northeast and the Southeast experienced positive growth during the decade, but the Northeast's growth (5.1 percent) was greater than the state average. From 2000 to 2002, the state's under 15 population literally declined by –1.6 percent. All four quadrants of the state declined over the two years. (The new metropolitan counties were the only ones to experience any growth in this age category.)

Table 7b shows the proportion of the age groups living in each district. For example, in 1990, 15.8 percent of the Northeast District's population was aged 65 and over. Of the four districts, that was the smallest proportion of this age group in 1990. From 1990 to 2000, all districts saw their percentage of 65 and over population decline, but the most striking is in Northwest where the fraction fell from 17.5 percent to 15.7 percent. However, from 2000 to 2002, the Northwest district's fraction of population age 65 and over jumped back up to 16.2 percent and is the highest proportion among the four districts. The smallest proportion, for all three years shown, is in the Northeast.

In general, there is a decline in the portion of the 65 and over population living in non-metropolitan Oklahoma. In 1990, 50.3 percent of the state's population of those aged 65 and over lived in non-metropolitan Oklahoma. By 2000 the percentage had fallen to 46.5 percent. In 2002 the percentage was 45.6 percent using old metro definitions and 44.1 percent using new definitions.

For the under 15 component of the population, the Southwest had the largest proportion of this population in both 1990 and 2000. It is interesting that for 2002 the four districts have almost identical proportions of this age category. Using new definitions of metro, the four districts post proportions ranging from 19.47 percent to 19.96 percent. Again, all four districts show a decline in the percentage of population that is in this age group from 1990 to 2000 and from 2000 to 2002.

As a percentage of the state's total population, the portion under the age of 15 has declined since 1990. In that year, 22.5 percent of the state's population was under age 15. By 2000, the percentage had dropped to 21.2 percent. For 2002 the percentage was 20.7 percent.

Figure 10. Percentage Population Growth 1990-2000

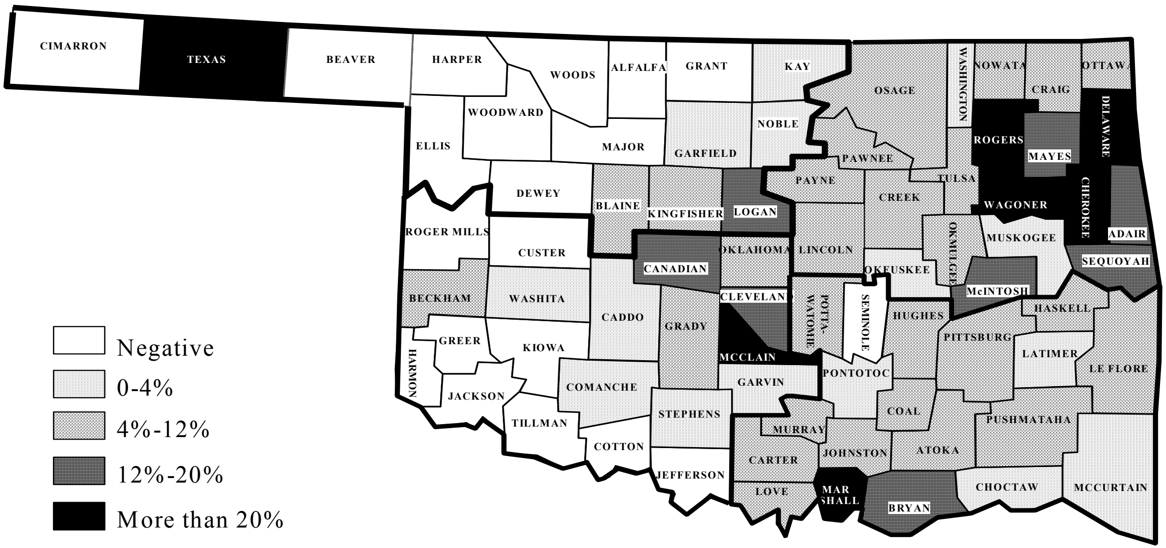
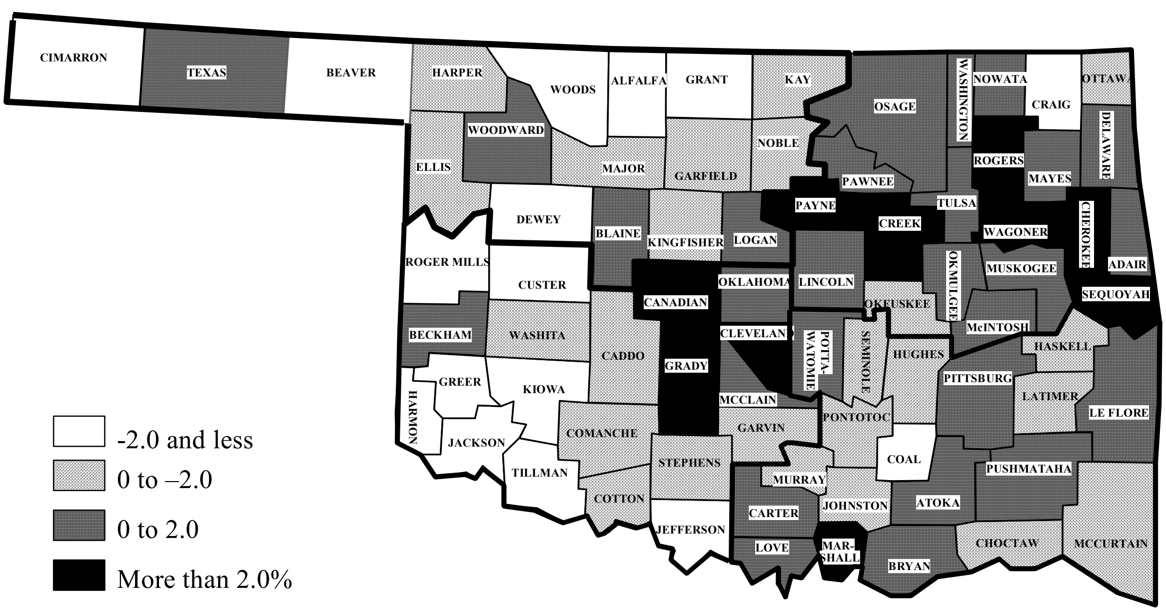


Figure 11. Percentage Population Growth 2000-02



State 2-year growth = 1.25%

Figure 12. Percentage Population Growth, 1990-2000, Age 65 and Over

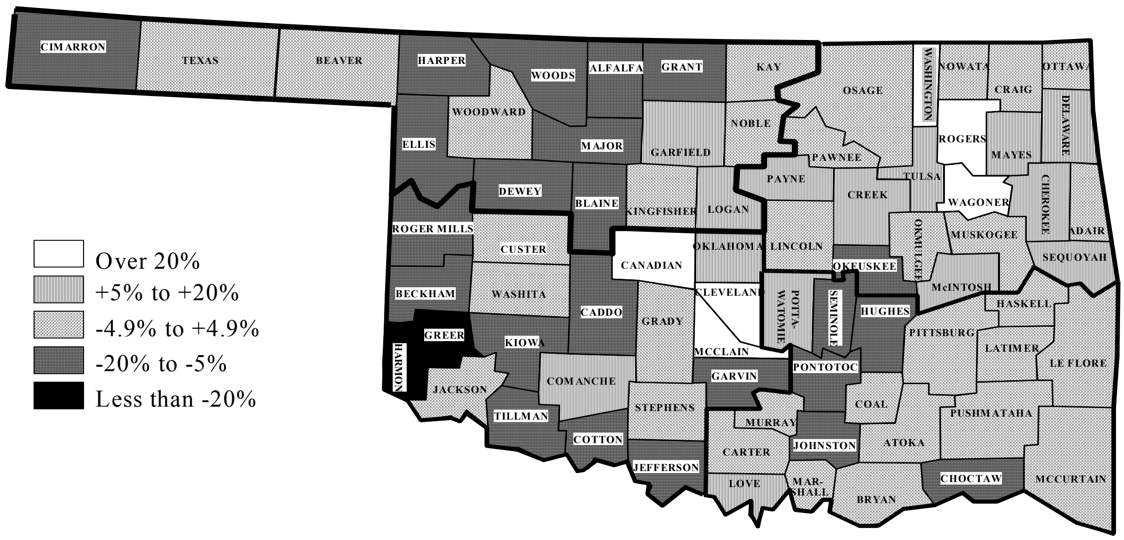
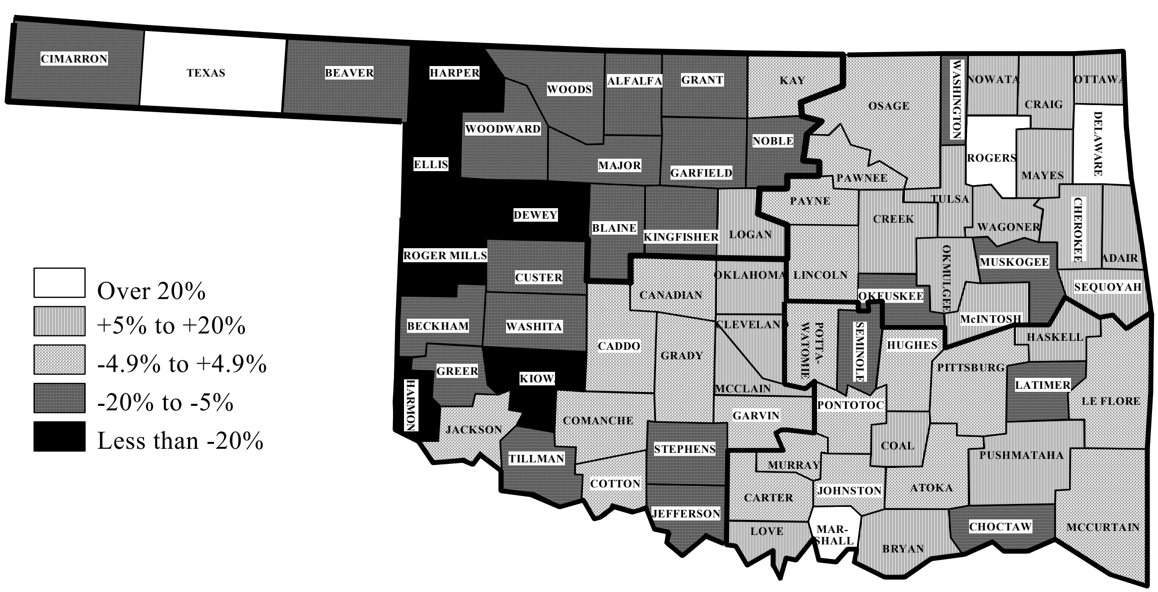


Figure 13. Percentage Population Growth, 1990-2000, Under Age 15



Figures 10 and 11 are maps showing the percent growth for each county in Oklahoma from 1990 to 2000 and from 2000 to 2002, respectively. During both time periods, a great deal of the growth in the population for Oklahoma occurred in the eastern half of the state, especially the northeastern quadrant.

Figures 12 and 13 show population growth from 1990 to 2000 in Oklahoma for residents aged 65 and over and residents under the age of 15. From 1990 to 2000, the older population grew significantly in 19 counties, 12 of which were metropolitan counties. With respect to the younger population, 24 counties saw substantial growth, 8 of which were metropolitan counties. In both cases, most of the growth occurred in central or northeast Oklahoma. The following counties exhibited substantial growth in both populations: Logan, Oklahoma, Cleveland, McClain, Creek, Tulsa, Mayes, Rogers, Wagoner, McIntosh, Love, Sequoyah, Cherokee, and Delaware. Of the 30 counties that experienced substantial *loss* of the under 15 population from 1990 to 2000, 19 also experienced substantial loss of the 65 and over population. The counties with major population losses tend to be located in the western part of the state.

Although 1980 to 1990 maps are not pictured, it is still interesting to note that the following counties experienced substantial gains in both populations from 1980 to 1990 *and* from 1990 to 2000: Cleveland, McClain, Tulsa, Rogers, Cherokee, and Delaware. The following rural counties experienced major losses in both populations from 1980 to 1990 *and* from 1990 to 2000: Greer, Woods, Alfalfa, Grant, Blaine, Roger Mills, Harmon, Tillman, and Jefferson.

Employment Trends

Unemployment rates and employment figures as provided by the Oklahoma Employment Security Commission (OESC) are provided in Table 8 for the non-metropolitan counties of the four OCES service districts and as well as for the state, metropolitan, and non-metropolitan areas. New metro definitions were used in Table 8. The greatest growth in rural employment from 2000 to 2002 occurred in the Southeast district at 2.2 percent. This is even greater than the growth that occurred in metropolitan areas (1.3 percent). Employment in the Southwest district increased slightly at 0.3 percent, but employment in the Northeast and Northwest districts both declined from 2000 to 2002. The average growth in employment for the state was about 1.0 percent from 2000 to 2002. Employment in non-metropolitan Oklahoma increased by 0.3 percent during the same time frame.

In 2000, the state unemployment rate was 3.07 percent. By 2001, it was up to 3.82 percent, and by 2002 it was 4.52 percent. In general, metropolitan areas tend to report lower rates of unemployment compared to the state average, and non-metropolitan areas tend to report higher unemployment rates. This was true for Oklahoma in all three years shown, but the narrowing of this gap for 2002 is very interesting. In 2002, the unemployment rates for metro versus non-metro versus the state all fall in the range of 4.50 to 4.53 percent. Of the four districts, the Southeast district tends to have the highest rates of unemployment—5.12 percent in 2002. Of the four OCES districts, the Northwest district reported the lowest unemployment rates for 2000 (3.13 percent) and 2001 (3.25 percent), but the Southwest district had the lowest rate in 2002 (3.89 percent). Figure 14 illustrates the unemployment rates for the four OCES districts and for metropolitan areas of Oklahoma from 1990 to 2002. Old metro definitions were used in the figure in order to continue the trend line.

Table 9 provides information on employment by industry for the non-metropolitan counties of the four OCES service districts in 2000 and 2001. Only new metro definitions are used. Recall that employment data is complicated by the fact that 2000 industry definitions are based on the SIC codes while 2001 definitions are based on the NAICS. Data for 2000 cannot be compared to data for 2001. (Data for 2000 and 2001 are presented side-by-side for convenience purposes only.) Beginning with the Northeast district, the top three industries that provided the greatest number of jobs in 2000 were services, government and government enterprises, and retail trade, respectively. In the Northwest district, the top three industries that provided the most jobs in 2000 were services, retail trade, and government and government enterprises. The three major employers in the Southeast district in 2000 were services, government and government enterprises, and retail trade, respectively. Finally, in the Southwest district the three top employers in 2000 were services, government and government enterprises, and retail trade, respectively.

For the 2001 data, services have been broken down into 8 separate categories (that do NOT exactly correspond to the 2000 definition of services); thus services will not emerge as one of the top three employers in the districts. The top three employers are as follows: in the Northeast district, government, retail, and manufacturing; in the Northwest district, government, farm, and retail; in the Southeast district, government, retail, and farm; and in the Southwest district, government, farm and retail.

Total Personal Income and Per Capita Income

Table 10 presents income data as provided by the Bureau of Economic Analysis for the years 1995, 2000, and 2001. Total personal income in the non-metropolitan counties (old definitions) of the state increased from $21.03 billion in 1995 to $26.48 billion in 2000—an increase of 25.9 percent. In the metro counties of the state, personal income increased by

33.4 percent, from $42.30 billion to $56.45 billion. Personal income statewide increased from $63.33 billion in 1995 to $82.93 billion in 2000, and increase of 30.9 percent.

Among the four OCES districts (old definitions), the area with the greatest personal income in 2000 was the Northeast district. The Northeast district also experienced the greatest growth from 1995-2000 as personal income increased from $7.76 billion to $9.89 billion (27.5 percent growth). The Southwest experienced the slowest income growth across the state, growing by 22.7 percent from 1995-2000. During that time, income grew from $4.38 billion to $5.38 billion.

The change in income from 2000 to 2001 will be based on new metro definitions. The Northeast district remains the district with the highest personal income in 2001 ($8.63 billion) followed by the Southeast district with $8.07 billion. The Southwest has the lowest personal income at $4.67 billion. The fastest growth in income from 2000 to 2001 was in the Southeast district (4.6 percent), followed by the Northeast district (3.8 percent), the Southwest district (3.3 percent) and the Northwest district (1.6 percent).

In an interesting aside, note how the change in metropolitan definitions affects each of the districts by comparing 2000 income data for both sets of definitions. For example, personal income in the Northeast district declines in 2000 because of the new definition. This is because three counties in the Northeast (Pawnee, Lincoln, and Okmulgee) were given metropolitan status and the income data for these metropolitan counties are no longer included in the district total. In an opposite turn of events, income data for the Northwest district increases in 2000 because of the new definition. Because of the new definition, Garfield County loses its metropolitan status and its data (which is substantial) now gets included in the district's total.

Table 10 also shows per capita income information. Per capita income levels tend to be higher in metropolitan areas than in non-metropolitan areas. In metropolitan Oklahoma, per capita income was $21,257 in 1995 and $26,854 in 2000 (old metro definitions). For non-metropolitan Oklahoma, per capita income was $15,955 in 1995 and $19,580 in 2000. State averages fall in between with per capita income of $19,144 in 1995 and $24,007 in 2000. Figure 15 illustrates per capita income for the four OCES service districts and for metropolitan areas in Oklahoma. Old metro definitions were used in order to continue the trend line.

No matter what definition is used, the Northwest district has the highest per capita income levels of the four districts. Even so, in 1995, the Northwest district lagged the state by $1,300 per capita. In 2000, the deficit for the Northwest district was $1,543 using old definitions. The new metro definition helped some, lowering the gap to $1,185 in 2000; however, the 2001 deficit was back up to $1,547. Of the four districts, the Southeast has traditionally had the lowest per capita income. In 1995, its per capita income was $15,024, which lagged the state average by $4,120. By 2000, the gap had widened to $5,576. The change in metro definitions helped just a little for 2000 by making the Southeast's deficit $5,405. The gap for 2001 is $5,474. The Northeast district lagged the state by $2,981 in 1995 and by $4,337 in 2001. Similarly losing ground, the Southwest district lagged the state by $3,420 in 1995 and by $4,607 in 2001.

Table 8
Employment and Unemployment Rate for State, Metropolitan, Non-metropolitan, and the Four OCES Districts (New Definitions): 2000-2002

	Employment				Unemployment Rate		
	2000	**2001**	**2002**	**% Change 2000-02**	**2000**	**2001**	**2002**
Northeast District	178,013	176,316	176,098	-1.08%	3.43%	3.91%	4.62%
Northwest District	107,300	107,308	106,732	-0.53%	3.13%	3.25%	3.98%
Southeast District	172,315	175,793	176,177	2.24%	4.22%	4.77%	5.12%
Southwest District	95,930	96,153	96,264	0.35%	3.30%	3.62%	3.89%
State	1,601,242	1,607,042	1,616,783	0.97%	3.07%	3.82%	4.52%
Metropolitan	1,047,725	1,051,500	1,061,539	1.32%	2.78%	3.71%	4.50%
Non-metropolitan	553,558	555,569	555,271	0.31%	3.60%	4.01%	4.53%

Note: District totals exclude metropolitan counties within its boundaries. New metropolitan definitions were used.
Source: Oklahoma Employment Security Commission

Table 9
Employment by Industry for State and Four OCES Districts, 2000[1] and 2001[2]

SIC Industry Definitions - 2000	2000 State	2000 NE	2000 NW	NAICS Industry Definitions - 2001	2001 State	2001 NE	2001 NW
Farm employment	98,536	*17,169	*18,104	Accommodation/Food Service	125,910	12,392	5,828
Ag. serv., forestry, fishing, other	22,417	844	1,319	Administrative&Waste Services	126,631	6,445	5,288
Mining	55,650	444	5,384	Arts/Recreation/Entertainment	27,209	2,657	1,167
Construction	103,292	10,563	5,841	Educational Services	21,589	495	333
Manufacturing	189,743	20,354	8,596	Health Care & Social Assistance	178,516	5,935	9,783
Transportation / public utilities	103,212	7,053	7,416	Mgmt of Companies & Enterprises	13,845	330	157
Wholesale trade	75,793	*5,374	4,196	Professional & Technical services	90,331	5,805	1,604
Retail trade	335,928	*34,388	*21,602	Other Services exc. public adminis.	120,893	*13,012	7,122
Finance, insurance, real estate	129,917	*10,199	7,514	Farm employment	101,861	*17,823	*18,862
Services	586,645	46,713	22,674	Forestry, fishing, & related	8,430	(D)	464
Government/gov't enterprises	321,665	*41,883	*20,613	Mining	54,117	1,629	6,228
				Construction	112,615	9,795	6,703
				Manufacturing	177,535	*19,435	8,178
				Transportation & Warehousing	58,271	1,227	4,282
				Information	41,868	1,916	1,286
				Wholesale trade	63,367	4,529	3,666
				Retail trade	229,668	*24,550	*15,570
				Finance & insurance	81,728	5,489	4,782
				Real Estate & Rental	61,118	4,584	2,787
				Utilities	11,441	433	496
				Government/gov't enterprises	334,338	*46,237	*20,749
Total full- and part-time employment	2,022,798	*209,331	*140,636	Total full- and part-time employment	2,041,281	*210,315	*143,278

[1] Employment data for 2000 is based on SIC industry definitions. Except for "Total Employment," these data should NOT be compared to data for 2001.
[2] Employment data for 2001 is based on NAICS industry definitions. Except for "Total Employment," these data should NOT be compared to data for 2000.
* State totals are complete, but most of the other subtotals are incomplete due to a lack of disclosure. Only those sub-state entries marked with an asterisk (*) are complete.
(D) Disclosure avoided. No estimate available.
Note: Metropolitan counties within the district's boundaries have been excluded. New metropolitan definitions were used to define the districts.

Source: Regional Economic Information Service, Bureau of Economic Analysis

Table 9 Continued

Employment by Industry for State and Four OCES Districts, 2000[1] and 2001[2]

SIC Industry Definitions - 2000	2000			NAICS Industry Definitions - 2001	2001		
	State	SE	SW		State	SE	SW
Farm employment	98,536	*21,375	*15,533	Accommodation/Food Service	125,910	9,984	4,910
Ag. serv., forestry, fishing, other	22,417	1,032	1,366	Administrative&Waste Services	126,631	8,117	1,586
Mining	55,650	4,728	4,979	Arts/Recreation/Entertainment	27,209	1,689	697
Construction	103,292	10,141	4,368	Educational Services	21,589	1,251	456
Manufacturing	189,743	23,099	7,878	Health Care & Social Assistance	178,516	13,191	4,654
Transportation / public utilities	103,212	7,642	4,060	Mgmt of Companies & Enterprises	13,845	190	125
Wholesale trade	75,793	5,181	2,467	Professional & Technical services	90,331	4,751	1,775
Retail trade	335,928	*32,697	*19,846	Other Services exc. public adminis.	120,893	13,454	*7,743
Finance, insurance, real estate	129,917	*9,563	6,503	Farm employment	101,861	*21,935	*16,059
Services	586,645	*53,967	24,445	Forestry, fishing, & related	8,430	187	267
Government/gov't enterprises	321,665	*33,420	*23,254	Mining	54,117	6,796	5,620
				Construction	112,615	10,892	5,699
				Manufacturing	177,535	20,226	7,138
				Transportation & Warehousing	58,271	4,743	2,168
				Information	41,868	2,112	943
				Wholesale trade	63,367	5,211	1,857
				Retail trade	229,668	*23,547	*15,422
				Finance & insurance	81,728	5,918	3,970
				Real estate & Rental	61,118	3,760	2,164
				Utilities	11,441	1,161	781
				Government/gov't enterprises	334,338	*37,768	*23,569
Total full- and part-time employment	2,022,798	*208,026	*120,004	Total full- and part-time employment	2,041,281	*212,590	*121,393

[1] Employment data for 2000 is based on SIC industry definitions. Except for "Total Employment," these data should NOT be compared to data for 2001.

[2] Employment data for 2001 is based on NAICS industry definitions. Except for "Total Employment," these data should NOT be compared to data for 2000.

* State totals are complete, but most of the other subtotals are incomplete due to a lack of disclosure. Only those sub-state entries marked with an asterisk (*) are complete.

Note: Metropolitan counties within the district's boundaries have been excluded. New metropolitan definitions were used to define the districts.

Source: Regional Economic Information Service, Bureau of Economic Analysis

Table 10
Total Personal and Per Capita Income for State, Metropolitan, Non-metropolitan,
And the Four OCES Districts: 1995 – 2000, 2001

	Total Personal Income (in Thousands of Dollars)					Per Capita Income		
Area	1995	2000	2001	% Change 1995-00	% Change 2000-01	1995	2000	2001
Old Definitions								
Northeast District	7,760,377	9,893,290		27.48%		16,613	19,603	
Northwest District	3,070,091	3,883,898		26.51%		17,844	22,464	
Southeast District	5,815,689	7,324,929		25.95%		15,024	18,431	
Southwest District	4,384,780	5,378,388		22.66%		15,724	19,397	
State	63,333,301	82,930,984		30.94%		19,144	24,007	
Metropolitan	42,302,364	56,450,479		33.45%		21,257	26,854	
Non-metropolitan	21,030,937	26,480,505		25.91%		15,955	19,582	
New Definitions								
Northeast District		8,315,310	8,633,195		3.82%		19,979	20,608
Northwest District		5,262,139	5,346,170		1.60%		22,822	23,348
Southeast District		7,719,376	8,072,544		4.58%		18,602	19,471
Southwest District		4,519,734	4,670,785		3.34%		19,508	20,338
State		82,930,984	86,549,589		4.36%		24,007	24,945
Metropolitan		57,114,425	59,826,895		4.75%		26,430	27,476
Non-metropolitan		25,816,559	26,722,694		3.51%		19,960	20,681

Note: District totals exclude metropolitan counties within its boundaries.
Source: Regional Economic Information System, Bureau of Economic Analysis

Figure 14. Unemployment Rates, 1990-2002 The OCES Districts and Metro Oklahoma (Old Definitions)

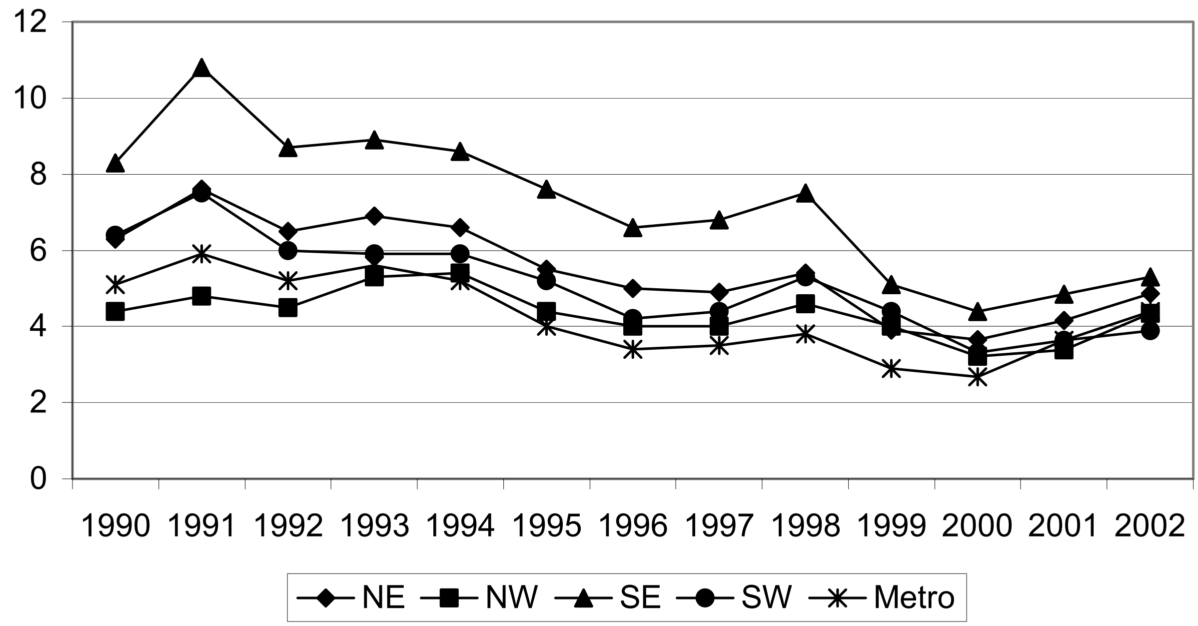


Figure 15. Per Capita Income for the OCES Districts, State, and Metropolitan Areas (Old Definitions), 1996-2001

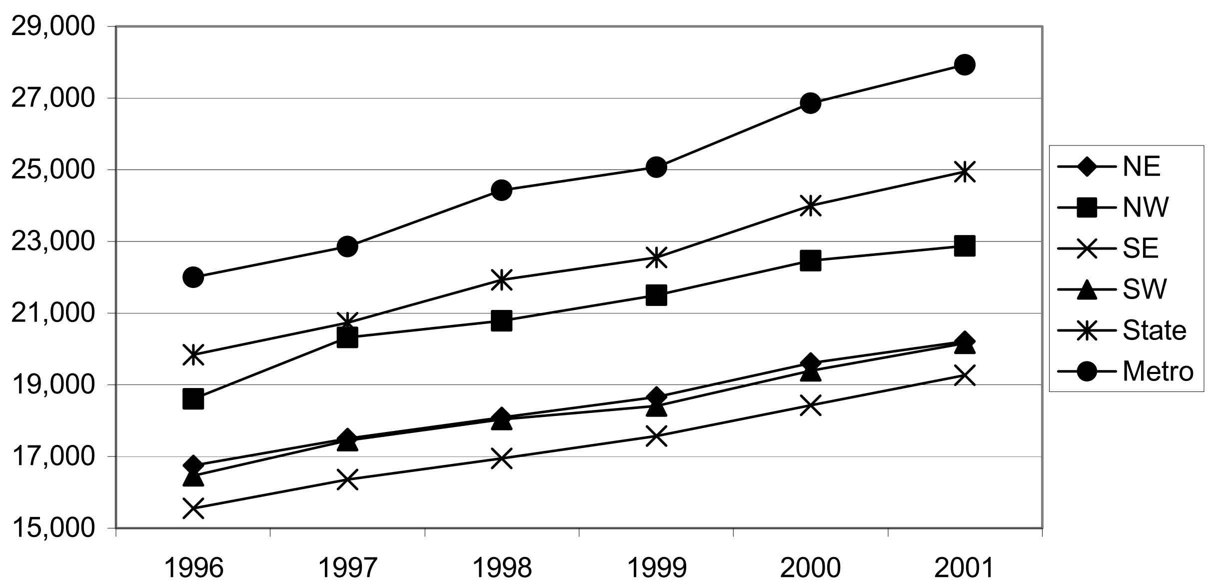


Table 11 provides data showing total personal income by major source for the state and the non-metropolitan counties of the four OCES service districts for the years 2000 and 2001. New metro definitions were used. Beginning with the Northeast district, total personal income increased by 3.8 percent, compared to 4.4 percent for the state, from 2000 to 2001. Note that growth for adjustment for residence is positive (0.6 percent). The growth in the adjustment for residence indicates that more income is earned by people who work outside of the district, but who bring their paycheck home. A major source of income growth for the district, for the year, is transfer payments (9.94 percent). Among the four districts, this is the greatest increase in transfer payments, and is slightly greater than the 9.87 percent growth rate experienced by the state overall.

Transfer payments include “welfare payments” or income maintenance benefits, but they also include a variety of other payments by the government. Table 12 shows a breakdown of the various categories of transfer payments received in the state and in the non-metropolitan counties of the four OCES districts. For the Northeast district the largest category of transfers is retirement and disability insurance, followed by medical payments. The fastest growing category of transfers from 2000 to 2001 is unemployment insurance benefits (41.3 percent). Unemployment insurance is also the fastest growing category statewide, growing by 59.5 percent for the year.

In the Northwest district, total personal income increased by 1.6 percent, compared to 4.4 percent for the state. Adjustments for residence declined significantly going from positive to negative meaning that people are working in the district but living outside of the district (and taking their income home with them.) Major sources of increased income in the district from 2000 to 2001 include transfer payments (7.7 percent) and wage and salary disbursements (7.0 percent). Retirement and disability insurance benefits are the largest source of transfer payments in the district. The category of transfers with the greatest growth for the year is other payments to individuals (64.7 percent), which consist largely of Bureau of Indian Affairs payments, compensation to survivors of public safety officers, compensation to crime victims, disaster relief payments, and compensation for Japanese internment. Unemployment benefits increased by 31.6 percent in the Northwest district from 2000 to 2001.

Total personal income increased by 4.6 percent in the Southeast district from 2000 to 2001, compared to 4.4 percent for the state. Major sources of income growth include other labor income (11.2 percent) and transfer payments (9.5 percent). The largest category of transfer payments for the Southeast district is retirement and disability insurance. The fastest growing categories of transfer payments from 2000 to 2001 were other payments to individuals (49.4 percent), followed closely by unemployment benefits, which increased by 46.2 percent for the year.

In the Southwest district, total personal income increased by 3.3 percent from 2000 to 2001. The major sources of growth were adjustment for residence (6.3 percent), and transfer payments, which increased by 7.3 percent. The largest category of transfers is retirement and disability insurance. The fastest growing category of transfer payments for the year appears to be other payments to individual with growth of 109.4 percent, although this is somewhat questionable due to lack of disclosure issues. The next fastest growth is in unemployment benefits, which increased by 38.8 percent for the year.

To summarize the transfer payment information, transfer payments are the greatest source of income growth for the state over the last year. They are also the largest source of income growth in three of the four OCES districts. When looking at the different kinds of transfer payments statewide and in the four districts, unemployment insurance stands out as the major source of growth statewide and in three of the four districts.

Table 11
Total Personal Income by Major Source for the State and the Four OCES Districts, 2000-2001
(Thousands of Dollars)

	Oklahoma			Northeast District			Northwest District		
	2000	*2001*	*% Change 2000-01*	*2000*	*2001*	*% Change 2000-01*	*2000*	*2001*	*% Change 2000-01*
Earnings by Place of Work	57,597,895	59,936,900	4.06%	4,757,055	4,880,040	2.59%	3,385,837	3,409,181	0.69%
Wage and salary disbursements	41,911,087	43,766,192	4.43%	3,545,775	3,669,408	3.49%	2,318,433	2,481,760	7.04%
Proprietors' income	9,893,022	10,002,007	1.10%	696,742	656,558	-5.77%	745,492	583,279	-21.76%
Other labor income	5,793,786	6,168,701	6.47%	514,538	554,074	7.68%	321,912	344,142	6.91%
Plus: Adjustment for residence	945,584	934,297	-1.19%	521,061	524,379	0.64%	7,168	-7,048	-198.33%
Plus: Dividends, interest, and rent	15,101,920	15,350,828	1.65%	1,643,218	1,674,103	1.88%	1,156,608	1,178,370	1.88%
Plus: Transfer payments	12,623,026	13,869,065	9.87%	1,659,568	1,824,552	9.94%	898,946	968,202	7.70%
Less: Personal cont. for social insur.	3,337,441	3,541,501	6.11%	265,592	269,879	1.61%	186,420	202,535	8.64%
Total Personal Income ($000)	82,930,984	86,549,589	4.36%	8,315,310	8,633,195	3.82%	5,262,139	5,346,170	1.60%

Note: District totals exclude metropolitan counties within its boundaries. New metropolitan definitions were used.

Source: Regional Economic Information Service, Bureau of Economic Analysis

Table 11 Continued
Total Personal Income by Major Source for the State and the Four OCES Districts, 2000-2001
(Thousands of Dollars)

	Oklahoma			Southeast District			Southwest District		
	2000	*2001*	*% Change 2000-01*	*2000*	*2001*	*% Change 2000-01*	*2000*	*2001*	*% Change 2000-01*
Earnings by Place of Work	57,597,895	59,936,900	4.06%	4,422,065	4,593,000	3.87%	2,581,300	2,643,086	2.39%
Wage and salary disbursements	41,911,087	43,766,192	4.43%	3,157,271	3,351,617	6.16%	1,793,536	1,868,573	4.18%
Proprietors' income	9,893,022	10,002,007	1.10%	817,379	743,718	-9.01%	488,981	460,839	-5.76%
Other labor income	5,793,786	6,168,701	6.47%	447,415	497,665	11.23%	298,783	313,674	4.98%
Plus: Adjustment for residence	945,584	934,297	-1.19%	408,474	412,633	1.02%	120,020	127,548	6.27%
Plus: Dividends, interest, and rent	15,101,920	15,350,828	1.65%	1,370,678	1,393,917	1.70%	966,626	984,278	1.83%
Plus: Transfer payments	12,623,026	13,869,065	9.87%	1,780,758	1,950,350	9.52%	991,376	1,063,834	7.31%
Less: Personal cont. for social insurance	3,337,441	3,541,501	6.11%	262,599	277,356	5.62%	139,588	147,961	6.00%
Total Personal Income ($000)	82,930,984	86,549,589	4.36%	7,719,376	8,072,544	4.58%	4,519,734	4,670,785	3.34%

Note: District totals exclude metropolitan counties within its boundaries.

Source: Regional Economic Information Service, Bureau of Economic Analysis

Table 12
Transfer Payments for the State and the Four OCES Districts, 2000-2001
(Thousands of Dollars)

	Oklahoma			Northeast			Northwest		
	2000	**2001**	**% Change 2000-01**	**2000**	**2001**	**% Change 2000-01**	**2000**	**2001**	**% Change 2000-01**
Ret. & disab. insurance benefit payments	5,431,297	5,725,008	5.41%	723,475	764,252	5.64%	437,303	455,164	4.08%
Medical payments	4,494,869	5,198,255	15.65%	566,149	656,006	15.87%	318,776	361,462	13.39%
Income maintenance benefit payments	1,130,523	1,190,578	5.31%	150,317	159,360	6.02%	58,597	60,708	3.60%
Unemployment insurance benefit payments	125,923	200,822	59.48%	14,428	20,379	41.25%	† 7,656	† 10,076	31.61%
Veterans benefit payments	605,448	639,860	5.68%	87,629	92,014	5.00%	25,099	25,847	2.98%
Fed educ. & trng. asst. pay. (excl. vets)	158,141	199,106	25.90%	34,327	44,683	30.17%	† 6,929	† 8,407	21.33%
Other payments to individuals	18,397	28,188	53.22%	3,569	4,712	32.03%	† 744	† 1,225	64.65%
Payments to nonprofit institutions	385,195	398,011	3.33%	46,611	48,151	3.30%	25,469	25,994	2.06%
Business payments to individuals	273,233	289,237	5.86%	33,063	34,995	5.84%	18,066	18,893	4.58%
Total transfer payments	12,623,026	13,869,065	9.87%	1,659,568	1,824,552	9.94%	898,946	968,202	7.70%

Note: District totals exclude metropolitan counties within its boundaries. New Metropolitan definitions were used.

† Some counties in this district did not disclose because totals were less than $50,000, but estimates for this item are included in the state totals.

Source: Regional Economic Information Service, Bureau of Economic Analysis

Table 12 Continued
Transfer Payments for the State and the Four OCES Districts, 2000-2001
(Thousands of Dollars)

	Oklahoma			Southeast			Southwest		
	2000	**2001**	**% Change 2000-01**	**2000**	**2001**	**% Change 2000-01**	**2000**	**2001**	**% Change 2000-01**
Ret. & disab. insurance benefit payments	5,431,297	5,725,008	5.41%	732,226	769,729	5.12%	419,582	434,899	3.65%
Medical payments	4,494,869	5,198,255	15.65%	630,754	726,497	15.18%	360,967	405,174	12.25%
Income maintenance benefit payments	1,130,523	1,190,578	5.31%	200,717	216,182	7.70%	98,131	101,017	2.94%
Unemployment insurance benefit payments	125,923	200,822	59.48%	16,984	24,823	46.16%	8,280	11,494	38.82%
Veterans benefit payments	605,448	639,860	5.68%	97,239	100,391	3.24%	49,895	52,613	5.45%
Fed educ. & trng. asst. pay. (excl. vets)	158,141	199,106	25.90%	19,913	25,126	26.18%	† 8,373	† 10,311	23.15%
Other payments to individuals	18,397	28,188	53.22%	† 2,907	4,343	49.40%	† 852	† 1,784	109.39%
Payments to nonprofit institutions	385,195	398,011	3.33%	46,788	48,220	3.06%	26,340	26,856	1.96%
Business payments to individuals	273,233	289,237	5.86%	33,185	35,039	5.59%	18,684	19,516	4.45%
Total transfer payments ($000)	12,623,026	13,869,065	9.87%	1,780,758	1,950,350	9.52%	991,376	1,063,834	7.31%

Note: District totals exclude metropolitan counties within its boundaries. New metropolitan definitions were used.

† Some counties in this district did not disclose because totals were less than $50,000, but estimates for this item are included in the state totals.

Source: Regional Economic Information Service, Bureau of Economic Analysis

Trends in Retail Trade

Table 13 contains retail sales data for fiscal years 1993 and 2003, as available from the Oklahoma Tax Commission. In rural Oklahoma, the largest growth in retail sales from FY 1993 to 2003 was in the eastern half of the state. Retail sales in the Northeast district increased from about $2.18 billion in 1993 to $3.14 billion in 2003—growth of about 43.7 percent. Retail sales in the Southeast district increased from about $1.61 billion to $2.33 billion, an increase of 45.2 percent. Retail sales in the Southwest district increased by 35.5 percent from $1.23 billion to $1.67 billion, while retail sales in the Northwest increased 30.6 percent from $0.88 billion to $1.15 billion.

Across the state, retail sales increased from $21.18 billion in FY 1993 to $30.78 billion in FY 2003 for a growth rate of 45.4 percent. Metropolitan retail sales increased a bit faster at a rate of 47.2 percent. Total metro sales increased from $15.28 billion in FY 1993 to $22.50 billion in FY 2003. Rural retail sales increased from $5.90 billion to $8.29 billion (an increase of 40.4 percent).

From FY 2002 to FY 2003, state retail sales are down slightly—about 0.5 percent. They had also fallen slightly from FY 2001 to FY 2002. Two of the four districts are reporting sales slightly higher than last year—the Southeast and the Southwest.

Per capita retail sales dollars (average retail dollars spent per person) in non-metropolitan counties of the Northeast district went from $4,686 in FY 1993 to $6,158 in FY 2003. This compares to an increase for the state of $6,559 to $8,811. The gap between per capita retail sales for the state and non-metro counties in the Northeast district widened from $1,873 to $2,653 in the ten-year time span.

Per capita retail sales in the Northwest district increased from $5,217 to $6,715, and the gap between the district and the state widened from $1,342 to $2,096. In the Southeast district, per capita retail sales increased from $4,259 to $5,860. The gap between the district and the state widened from $2,300 to $2,951. Finally in the Southwest district, per capita retail sales increased from $4,459 to $6,077, and the gap between the state and the district increased from $2,100 to $2,734. Figure 16 plots per capita retail sales for the four OCES districts, the state, and metropolitan areas of Oklahoma from FY 1993 to FY 2003.

Note that all four non-metropolitan districts widened their per capita retail gap relative to the state over the decade shown. This is a telling indicator concerning the state of the economy in rural Oklahoma. When comparing metro versus non-metro counties, income gaps are widening, retail sales gaps are widening, and population is shifting in favor of the metropolitan areas.

Table 13
Total Retail Sales and Per Capita Retail Sales for State, Metropolitan, Non-metropolitan,
And the Four OCES Districts - Fiscal Years 1993 and 2003

Area	FY 1993	Total Retail Sales FY 2003	% Change 1993-2003	Per Capita Retail Sales 1993	2003
Old Definitions					
Northeast District	$2,182,147,601	$3,135,729,400	43.70%	$4,686	$6,158
Northwest District	$881,178,730	$1,150,883,230	30.61%	$5,217	$6,715
Southeast District	$1,605,720,035	$2,331,576,701	45.20%	$4,259	$5,860
Southwest District	$1,231,084,669	$1,668,187,604	35.51%	$4,459	$6,077
Non-metropolitan	$5,900,131,036	$8,286,376,935	40.44%	$4,582	$6,124
Metropolitan	$15,278,912,504	$22,497,377,471	47.24%	$7,871	$10,509
State	$21,179,043,540	$30,783,754,406	45.35%	$6,559	$8,811
New Definitions					
Northeast District		$2,747,761,415			$6,538
Northwest District		$1,722,794,587			$7,536
Southeast District		$2,584,423,942			$6,210
Southwest District		$1,445,257,035			$6,344
Non-metropolitan		$8,500,236,979			$6,575
Metropolitan		$22,283,517,427			$10,125
State		$30,783,754,406			$8,811

Note: District totals exclude metropolitan counties within its boundaries.

Source: ORIGINS (http://origins.ou.edu)

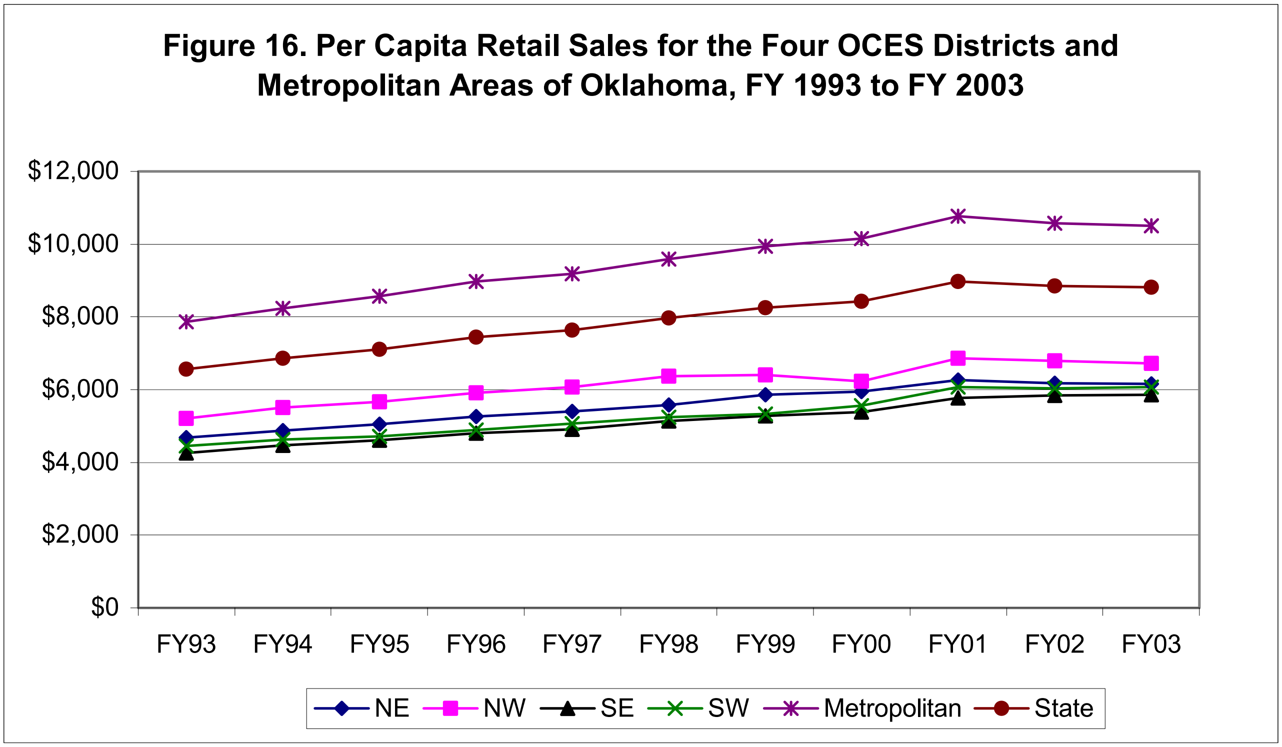


Figure 16. Per Capita Retail Sales for the Four OCES Districts and Metropolitan Areas of Oklahoma, FY 1993 to FY 2003
$12,000
$10,000
$8,000
$6,000
$4,000
$2,000
$0
FY93
FY94
FY95
FY96
FY97
FY98
FY99
FY00
FY01
FY02
FY03
NE
NW
SE
SW
Metropolitan
State

Summary

The following highlights summarize the observations made in this paper concerning the variables of population, employment, income, and retail sales for the state of Oklahoma, metro versus non-metro regions of the state, and the four OCES service districts.

<u>Metropolitan and Non-metropolitan Oklahoma</u>

- Changes in the definitions of "metropolitan" by the Office of Management and Budget caused Oklahoma to have 17 metropolitan counties (up from 14), 17 micropolitan counties (totally new designation), and 43 non-classified counties.
- Using original definitions of "metropolitan", from 1990 to 2000, non-metropolitan population increased by 6.0%, and from 2000 to 2002, population increased by 0.5%. The metropolitan population increased by 12.2% from 1990 to 2000, and increased by 2.02% from 2000 to 2002.
- From 2000 to 2002, 41 counties lost population to some degree. All of these counties, except one (Comanche), were non-metropolitan counties (new definition).
- There appears to be a shift of the state's total population and the state's elderly population toward the metropolitan areas. From 1990 to 2000, the state's non-metropolitan population of those aged 65 and over declined by -0.7%. In metropolitan Oklahoma this population increased by 15.6% during the same time frame. A similar pattern is seen for the 2000 to 2002 time frame.
- The major employment growth industries for non-metropolitan Oklahoma from 1995 to 2000 were finance, insurance and real estate (FIRE), agricultural services and manufacturing. The major sources of employment growth for metropolitan Oklahoma were finance, insurance and real estate, transportation and public utilities, and services. Mining jobs were lost statewide.
- Because of new industry definitions in employment data released by the Bureau of Economic Analysis (BEA), data for 2001 are not comparable to data for 2000 and before. 2001 industry classifications show that the largest employer statewide is government and government enterprises followed by retail trade.
- Total personal income in non-metro Oklahoma in 2001 was 31.6% of the state total.
- In 2001, per capita income for non-metro Oklahoma was only 72.5% of the per capita income for metro Oklahoma and just 81.2% of the state's average. Five years ago, in 1996, PCI in non-metro Oklahoma was 83.6% of the state average. Rural Oklahoma is losing ground in terms of PCI.
- Metropolitan counties received 54.1% of the states total transfer payments in 1996. That percentage increased to 56.5% in 2001.
- Non-metropolitan counties are more reliant on transfer payments to support total personal income than are metropolitan counties.
- In 2002, per capita retail sales equaled $6,113 for non-metro Oklahoma, $8,928 for the state, and $10,724 for metro-Oklahoma. Over the last 10 years, the gap between non-metro counties and the rest of the state has widened appreciably.

The Four OCES Districts

- In the Northwest district, 10 counties *significantly* lost population from 1990-2000. Texas County was the only county in the Northwest to show positive population growth greater than 20% from 1990-2000. In terms of the elderly population (age 65 and over), 9 counties suffered *major* loss from 1990-2000. In addition, 14 counties suffered *substantial* population loss of those under the age of 15 from 1990-2000. Only Texas County experienced *major* population growth of young people from 1990-2000.
- In the Northeast district, 18 counties experienced *substantial* population growth from 1990-2000 (all counties except Washington, Okfuskee, and Muskogee). No counties showed population decline. From 2000-02, Rogers, Wagoner, and Cherokee Counties continued their strong growth rates along with Payne, Creek and Sequoyah Counties. From 1990-2000, 3 counties experienced more than 20% growth in the elderly population, and 2 counties experienced greater than 20% growth of the under 15 population from 1990-2000.
- In the Southwest district, 9 counties experienced major population loss in 1990-2000. The metropolitan counties of Canadian, Cleveland, and McClain experienced population growth greater than 12%. Of those 3, Canadian and Cleveland, along with Grady show the fastest growth for 2000-2002. Canadian, Cleveland, and McClain also experienced greater than 20% population growth among the elderly during the same time period (1990-2000). McClain, Cleveland and Oklahoma Counties experienced greater than 5% population growth among those under the age of 15 from 1990-2000.
- In the Southeast district from 1990-2000, 14 counties experienced *substantial* growth. Only Seminole County posted significant negative growth. For 1990-2000 and 2000-02, Marshall County continues to be the fastest growing county in the district. While total population has grown in this district, the growth has not been in terms of the elderly population. Only 2 counties located in the Southeast district posted significant increases in the elderly population from 1990-2000. Six counties posted substantial gain in the under 15 population from 1990-2000, while 3 counties lost significant population of this group.
- Unemployment rates across the state in 2000 were low; however, the rates for the non-metropolitan OCES districts were all slightly higher than the state average of 3.0%. All areas of the state saw unemployment rates increase for 2001 and again for 2002. Interestingly, non-metro unemployment rates did not increase *as much* as rates did across the state and in metro areas.
- The largest employers in the OCES districts for 2001:
  - Northeast: government and retail.
  - Northwest: government and farms.
  - Southeast: government and retail.
  - Southwest: government and farms.
- Using new definitions, total personal income in the non-metropolitan counties of the Northwest, Northeast, Southwest and Southeast districts in 2001 was 6%, 11%, 5%, and 9% of the state total, respectively.
- Per capita income in 2001 in the non-metropolitan counties (new definitions) of the OCES districts lagged the state by the following amounts per capita:
  - Northeast: $4,337
  - Northwest: $1,597
  - Southeast: $5,474
  - Southwest: $4,607

- In FY 2003, per capita retail sales in the non-metropolitan counties (original definitions) of the OCES districts equaled the following:
  - Northeast: $6,158
  - Northwest: $6,715
  - Southeast: $5,860
  - Southwest: $6,077

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