Garner Economics LLC
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June, 2010

A Blueprint for Success: An Updated Economic Development Strategy for Bartlesville, Oklahoma

Prepared especially for the Bartlesville Development Commission:

bartlesville
IT'S TIME FOR BUSINESS.

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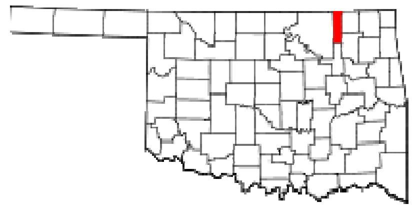
EXECUTIVE SUMMARY



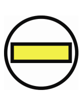
The Bartlesville Development Corporation (BDC) in Bartlesville, OK retained Garner Economics, LLC, a nationally known economic development consulting firm based in Atlanta, to update the BDC's current multiyear economic development strategy last completed in April of 2006. Our work focused on analyzing the community's assets and challenges, industry targets Bartlesville should pursue, and overall recommendations for a successful proactive economic development effort.

We first analyzed the City's competitiveness. Our Competitive Realities report examined the issues that impact and determine economic competitiveness and community vitality for Bartlesville. **Key demographic and economic indicators for the County (Washington) were compared to state and national trends as well as the comparison of Kansas City, Houston metro areas and the Tulsa Combined Statistical Area (CSA)[1], which were selected as benchmark communities by the BDC based on typical competitive markets to Bartlesville.** Throughout this report the use of *Bartlesville* refers to Washington County, OK unless otherwise noted.

To enable readers a summary overview of the report's main findings, a set of dashboard icons is presented. Each finding has an accompanying icon to assist with interpretation. Readers are encouraged to review the supporting data in the full report to gain a more complete understanding.

Dashboard Indicator Legend:

Indicator that Bartlesville is better (more positive) compared to a majority of the benchmark geographies, or points to a positive trend within the City.



Indicator is neutral, neither positive nor negative. Indicator may represent an observation, or be in the middle of the benchmark geographies.

Indicator that Bartlesville is worse compared to a majority of the benchmark geographies, or points to a negative trend within the City.

[1] The geographic components of each benchmark community are included in the Appendix.

Demographic Dynamics

Bartlesville has experienced mild population growth over the last ten years, up a total of 3.5 percent since 1999. Overall, population growth trends have been below the state and nation, and all three of the benchmark communities (page 11).

Sources of population growth are balanced; over the period of 2000-2009, international migration accounted for 46 percent of net new residents, domestic in-migration was responsible for 31 percent, and natural growth the remaining 23 percent (page 12).

With 88.6 percent of the population categorizing themselves as white, the population of Bartlesville is relatively less diverse, although the Native American Indian population makes up a larger share of the total population than in the state, nation, and benchmark communities (page 14).

At 40.6 years, the median age in Bartlesville is above the state, nation, and benchmark communities, resulting in a high old-age dependency ratio (page 15).

Bartlesville has a lower proportion of its population ages 44 and below. Age groups 55 and older comprise a higher proportion of total population than in the other geographies, averaging 2 percentage points higher (page 17).

Bartlesville has a higher proportion of residents with educational attainment of bachelor's degree or higher than in the state and Tulsa CSA, but lower than in Houston, Kansas City, and slightly below the nation. At attainment of 87.6 percent, High school graduate or higher is higher than all geographies except Kansas City (page 18).

In 2009, ACT scores for Bartlesville High School were significantly above the state and nation. Bartlesville High's composite ACT scores ranked 16th among Oklahoma's 447 schools with published results (page 19).

Economic Dynamics

The current average wage per job is 12 percent below the nation, and lower than all other benchmarks but the state (page 22).

Over the last ten years, adjusted for inflation, the average wage per job has declined by 1.1 percent, and in the last five years has not changed (page 22).

Per capita income is 11 percent above the state and 1.3 percent above the nation (page 24).

The ten year rate of growth of per capita income outpaces all the benchmark geographies except Tulsa and the nation, and the five year rate outpaces all of the benchmark geographies (page 24).

Bartlesville has a significantly lower proportion of total income from earnings, 13.2 percentage points below the nation and 12 percentage points below the state. Likewise, at 29.5 percent, income from *Dividends, interest, & rent* make up a notably larger proportion of total income than in the state, nation and benchmark communities (page 27).

Bartlesville has largely avoided the multi-year job losses of the current recession, having experienced only five months with year-to-year losses since 2007. Bartlesville had the highest relative average employment growth rate in 2007 and 2009, and placed second only to Tulsa in 2008 (page 28).

Early 2010 trends show Bartlesville's employment growth rate below the state, Houston, and Tulsa (page 28).

Since 2006 Bartlesville has held the lowest unemployment rate among the other geographies (page 30).

The number of private business establishments peaked in the first quarter of 2008 at 1,252 and has since declined slightly by 2.5 percent or 31 fewer establishments (page 32).

Industry Dynamics

Relative to the benchmark geographies examined, Bartlesville has a significantly larger proportion of employment in *Natural Resources and Mining*, and has the smallest relative share in six of the remaining nine major industry sectors (page 34).

Relative to the benchmark geographies, Bartlesville has the lowest percentage of Federal and State Government employment, each comprising less than one percent of total employment. Conversely, Bartlesville has the highest share of private employment at 87.7 percent (page 34).

Over the last five years, net employment growth was experienced in 16 of the 19 major industry sectors. Growth was led by *Healthcare & social services* and *Retail* sectors (page 35).

Over the last five years, job losses have come primarily from the Natural Resources[2] sector, down by 445 jobs or 12 percent (page 35).

A wide difference exists between the highest earning industries and the lowest earning industries. Bartlesville's highest earning industry, *Natural Resources,* is more than 600 percent above the lowest earning industries, *Accommodation and food services* (page 37).

Industry Specialization

The *Natural Resources* sector exhibits a very high degree of local specialization. To a lesser degree, three other major industry sectors have high local specialization: *Utilities*, *Agriculture* and *Retail* (page 38).

Over the last five years, a majority of industry sectors experienced employment growth that exceeded both the Tulsa MSA and national industry-specific trends (page 43).

[2] *Natural Resources* is a major industry sector classification which includes oil and gas extraction and related business activities.

Labor Market Analysis

Relative to the state and nation, Bartlesville has a higher proportion of workers classified as *Self-employed workers in own (not incorporated business)*, and a lower relative proportion of persons classified as *Government workers* (page 44).

Sixty four percent of workers in Washington County also live in Washington County. Fifty two percent of workers in Bartlesville City also live in Bartlesville City (page 45).

Tulsa County is the top source of in-commuters, and also the top location for Washington County's workers who out-commute for employment (page 45).

Among all 23 major occupational groups, Bartlesville exhibited strong local specialization in only one area, *Management* (page 48).

Among 84 sub-groups occupations; 18 exhibit high local specialization. Generally, the strongest occupational specialization is clustered in *management*, *healthcare*, *office & administrative support*, *construction & extraction*, and *production* (page 48).

Our **Assets and Challenges Assessment** serves as in depth analysis of Bartlesville using 85 screening factors or variables. This assessment is based on a review of economic and demographic characteristics, input from the BDC, interviews with local business and community leaders and the consulting team's experience working with communities across the country and corporate clients globally. This is normally the second step in a review of a City by a site selection consultant should a City make the initial cut. Our summary of Bartlesville's Assets and Challenges follows and the full analysis can be seen further in this report:

Challenge	Neutral	Asset
Well positioned to serve international markets	Centrally located for national market	Centrally located for major regional market
Port facilities	Common carrier trucking	Availability of technicians and scientists
Availability of unskilled and semi-skilled workers	Interstate highways	Quality of labor-management relations
Availability of engineering program	Rail service	Availability of post-secondary vocational training
Availability of forest products	Scheduled airfreight services	Availability of on-the-job training assistance
Availability of water/cost of water/sewer	Within 1 hour of commercial air passenger service	Within ½ hour of major university / college

Level of awareness of community regarding economic development	General aviation airport capable of handling corporate aircraft	Availability of agricultural products for food processing
Availability of fully served and attractive office sites	Local telephone company's capacity for simultaneous voice/data transmission and high speed internet services	Availability of minerals
Availability of suitable office space	Connection of local telephone company to national fiber optics network	Availability of business and professional services
Availability of adequate wastewater treatment capacity	Availability of skilled industrial workers	Local economic development organization has a strategic plan
Presence of major sporting events	Availability of skilled clerical workers	Level of leadership support of economic development program
Availability of major shopping facilities	Availability of managerial personnel	Level of funding for local economic development program
	Cost of labor	Availability of fully served and attractive industrial sites
	Cooperation of local state employment office in recruiting and screening applicants	Availability of low interest loans for small business
	Availability of intermediate manufactured goods and supplies	Availability of relocation incentives for transferees
	Availability of manufacturing processes	Quality of local elementary and secondary education
	Cost of electricity for industrial use	Quality of post-secondary education
	Availability of high quality electric service	Cost of housing
	Availability of uninterruptible natural gas	Level of cultural activity
Challenge	**Neutral**	**Asset**
	Adequate level of professional staff	Availability of first-class hotels, motels and resorts
	Involvement of both public and private sectors	Appearance of the Central Business District
	Level of cooperation between various organizations involved in economic development activity	
	Reasonably priced sites	
	Availability of suitable industrial space	
	Availability of tax-exempt financing for new industrial facilities	
	Availability of venture capital from local sources for business startups	
	Availability of adequate water and sewer lines to industrial sites	
	Condition and maintenance of local streets	
	Level of traffic-carrying capacity of local streets and highways	
	State and local environmental regulations	
	Business permitting procedures and costs	

	Zoning policies
	Building codes
	Local property taxes
	State and local sales and use taxes service taxes
	Availability of executive-level housing
	Availability of moderate cost housing
	Availability of apartments
	Level of crime
	Availability of recreational opportunities
	Level of air pollution
	Quality of climate
	Attractiveness of the physical environment
	General appearance of the community
	Availability of adequate medical facilities
	Quality of local restaurants

Lastly, from all of the research noted previously, we were able to identify the **optimal business targets** for Bartlesville. A summary of these targets are shown graphically with more detail in the full report.

Bartlesville Optimal Targets

Technical Environmental Services	Distribution & Logistics	Shared Back-Office Services	Instrumentation Control Systems	Tourism Development

Subsector Targets

Technical Environmental Services

- Environmental consulting services
- Scientific research and development services
- Geophysical surveying and mapping services
- Laboratory Testing Services
- Self-Employed Entrepreneurs

Distribution & Logistics

- Freight Packing & Logistics Services
- General warehousing and storage
- Refrigerated warehousing and storage
- General wholesaling

Shared Back-Office Services

- Office administrative services
- Payroll & Bookkeeping Services
- Computer systems design and related services

Instrumentation Control Systems

- Electronic instrument manufacturing
- Industrial valve manufacturing
- Electrical equipment manufacturing
- Engineering services

Tourism Development

- Cultural Tourism
- Destination Tourism

Our **Conclusions and Recommendations** can be found in detail beginning on page 63. A summary of these recommendations follow with the table below.

Recommendations for action are categorized under three areas of opportunity:

Organizational
Product Marketing
Product Improvement

The "Product" is considered Bartlesville.

Organizational	Product Marketing	Product Improvement
Chamber of Commerce should take the lead with retail promotion	Market itself as the Energy Innovation or Energy Research Corridor	Satellite campus of the University of Oklahoma's Mewbourne School of Petroleum and Geological Engineering
BDC should consider hiring one additional staff person that would serve as a project manager to direct the BDC's external marketing and sales efforts	Conduct a multi faceted print and electronic media campaign to the targeted industry sectors	BDC should either partner with a developer or undertake alone the development of a flexible office building
CVB should consider having a visitor's center kiosk at Woolaroc and at the Phillips Petroleum Company Museum	Visitations should occur with those companies that have been qualified from Whittaker	Wireless should be repaired in the central business district
	Web site needs to be designed to offer the resources that your specific audience's need	Venture capital fund or Angel network
	US HWY 75 from Tulsa to Bartlesville designated as an Interstate spur by the US Department of Transportation	Water supply enhancements
	Produce new collateral material that will effectively promote Bartlesville	Public Transportation
	Annual familiarization tour (FAM)	

Bartlesville is a unique community. Its economy is centered on the petroleum industry from the founding of Phillips Petroleum in 1905 and now through the merger of Conoco to form ConocoPhillips (CP). But with all communities that have an economy centered on one particular industry sector, it suffers boom and bust cycles and Bartlesville has not been immune to that. Additionally, many support businesses operate in Bartlesville because of ConocoPhillips, so the multiplier effect as a result of CP's presence is significant. But with any community that wants to help direct its economic destiny, Bartlesville must constantly and continually work to diversify its economic sectors and not be totally dependent on a single employer.

Bartlesville must look forward and recognize that to succeed it cannot be business as usual. It must be prepared to accept rapid change from the impact of a constantly evolving global economy. It should celebrate success with business locations and expansions no matter what size.

These are the themes that we have heard and observed. Now we challenge Bartlesville and the region to move forward with these recommendations.

INTRODUCTION AND METHODOLOGY

The Bartlesville Economic Development Commission (BDC) retained Garner Economics, LLC in January of 2010 to develop a multiyear economic strategy focusing on the community's assets and challenges, industry targets the City should pursue, and overall recommendations for a successful proactive business development effort.

To understand where you wish to be as a community, you must appreciate the historical context of what characteristics have brought your respective community to where you are today. Stephen Covey has said, "Seek first to understand" and our mission to conduct an economic strategy for Bartlesville uses his mantra of understanding the past and knowledge of today before you can plan for the future.

Our Assets and Challenges assessment, also referred to as a SWOT Analysis (strengths, weaknesses, opportunities and threats) allows us to document what problems exist in the City that constitutes barriers for successfully achieving the vision of its leadership.

Garner Economics conducted an assessment of the community from a corporate site selector's perspective. The objectives of this assessment were to:

- Identify key strengths to emphasize in economic development marketing efforts, and;
- Identify key weaknesses that may limit investment in Bartlesville so that remediation of these local challenges may occur.

Our approach began with interviews and focus group of over 45 people representing large and small employers, academia and elected officials. This gave us an overview of how local businesses and residents evaluate the business climate of Bartlesville. We then evaluated the opportunities and challenges in Bartlesville to serve as a "snapshot", and highlight information of concern to business leaders, site selectors, and other economic decision makers. Garner Economics evaluated the area's performance in a number of data trends and other factors that, taken as a whole, provide a condensed and candid assessment of Bartlesville's overall competitiveness and economic performance.

The findings, conclusions and recommendations of Garner Economics are contained in this report. The report is structured as to identify what issues are or have been impediments to growth in the City, what assets exist as it relates to economic development, and then recommendations to take the area to its next level in economic development. Garner Economics especially appreciates the assistance of the BDC and Nora Wegener, Executive Assistant of the BDC in providing logistical assistance and with David Wood, President of the BDC.

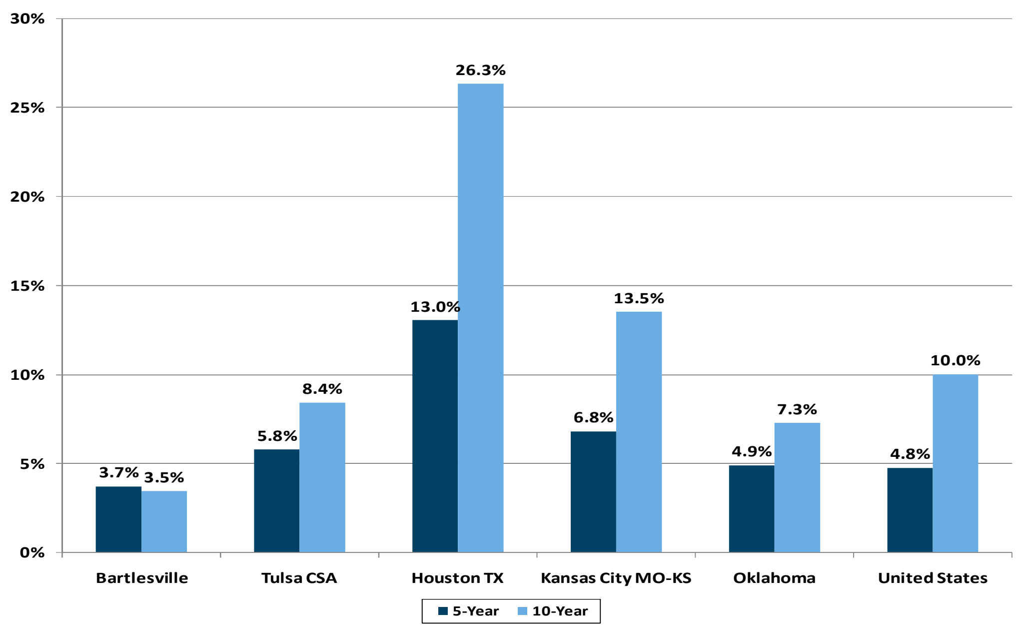
AN ECONOMIC ANALYSIS OF BARTLESVILLE

Demographic Dynamics

Population Growth

According to the U.S. Census Bureau, as of 2009 Bartlesville's population totaled 50,706. The figure is 1,816 persons or 3.7 percent more than five years earlier. Bartlesville has experienced mild population growth over the last ten years, up a total of 3.5 percent since 1999. Overall, population growth trends have been below the state and nation, and all three of the benchmark communities (Figure 1 and Table 1). Over the last ten years, total population in Bartlesville declined in five of the first six years, but rebounded in the last four years.

Figure 1
Population Growth Rate (2009)



Source: U.S. Census Bureau

Table 1
Population Growth

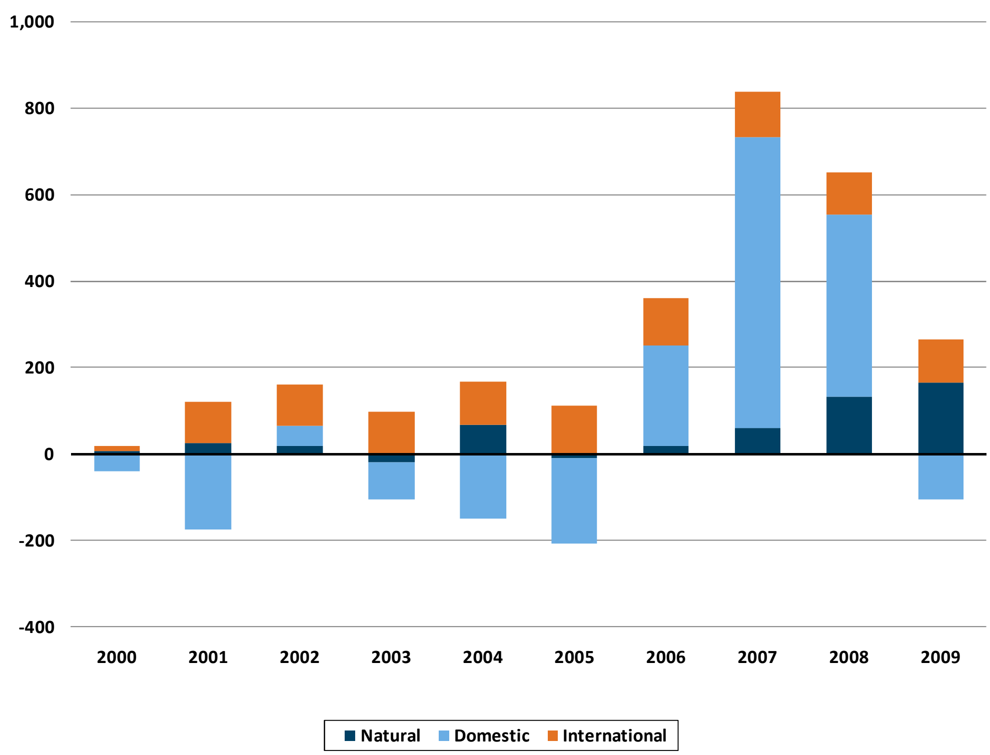
	2009 Population	10-Year Net Change	10-Year Percent	5-Year Net Change	5-Year Percent
Bartlesville	50,706	1,693	3.5%	1,816	3.7%
Tulsa CSA	979,721	76,077	8.4%	53,659	5.8%
Houston TX	5,867,489	1,222,963	26.3%	677,045	13.0%
Kansas City MO-KS	2,067,585	246,248	13.5%	131,745	6.8%
Oklahoma	3,687,050	249,903	7.3%	172,601	4.9%

Source: U.S. Census Bureau

Sources of Population Change

Population change has three major sources: 1) natural (births minus deaths), 2) domestic migration, and, 3) international migration[3]. The leading contributor to changes in Bartlesville's population is international migration (Figure 2 and Table 2). Over the period of 2000-2009, international migration accounted for 46.3 percent of net new residents. Domestic in-migration was responsible for 30.7 net new residents, and natural growth the remaining 23.1 percent. In six of the last ten years, domestic migration has been negative (out-migration exceeding in-migration). Compared to benchmarks, Bartlesville had the highest total share of population growth from international and domestic in-migration, and the lowest due to natural growth (Figure 3 and Table 3).

Figure 2
Annual Sources of Population Change
Bartlesville



Source: U.S. Census Bureau

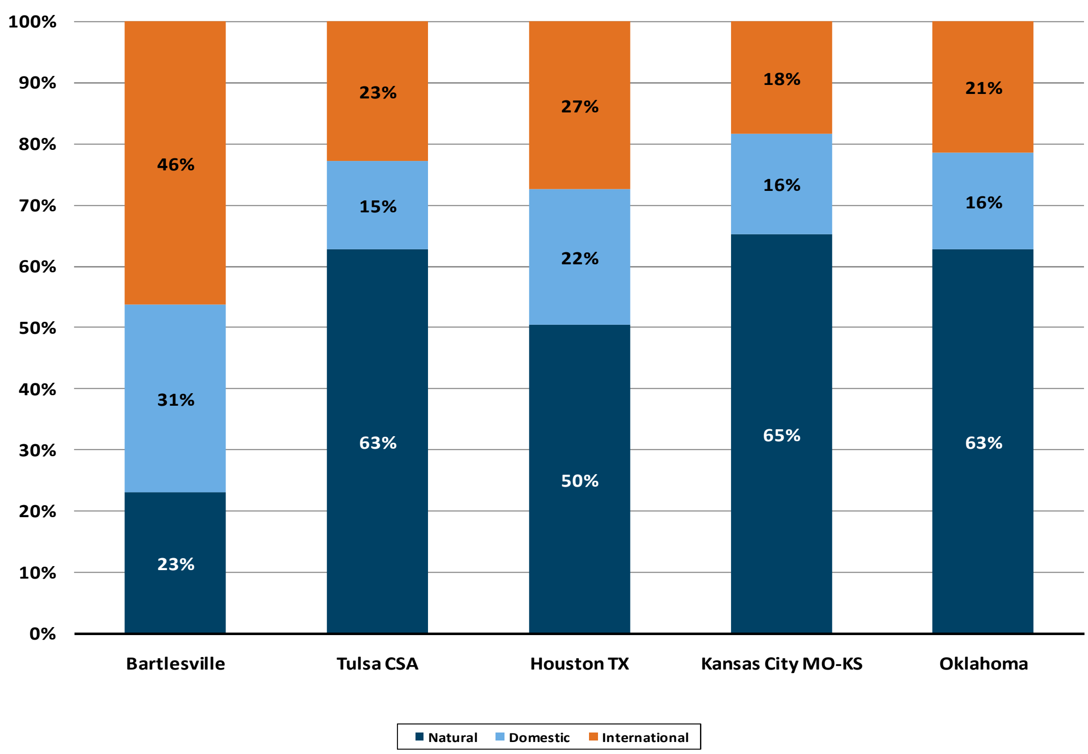
[3] Migration of the foreign born; lawful permanent residents (immigrants), temporary migrants (such as students), people illegally present in the United States, and additionally net movements of the Armed Forces population between the United States and overseas.

Table 2
*Source of Population Change**
2000-2009

Year	Total Net Population Change	Natural	Domestic	International
2000	-22	7	-41	12
2001	-56	26	-176	94
2002	161	17	47	97
2003	-7	-19	-86	98
2004	19	66	-149	102
2005	-96	-10	-197	111
2006	361	18	232	111
2007	838	60	672	106
2008	652	133	420	99
2009	158	165	-106	99

Components do not total exactly due to inter-year residual adjustments made by the Census Bureau.
Source: U.S. Census Bureau

Figure 3
Sources of Population Change by Percent
2000-2009



Source: U.S. Census Bureau

Table 3
Source of Population Change by Percent
2000-2009

	Natural	Domestic	International
Bartlesville	23%	31%	46%
Tulsa CSA	63%	15%	23%
Houston TX	50%	22%	27%
Kansas City MO-KS	65%	16%	18%
Oklahoma	63%	16%	21%

Source: U.S. Census Bureau

Race & Hispanic

With 88.6 percent of the population categorizing themselves as white, the population of Bartlesville is relatively less diverse, although the Native American Indian population makes up a larger share of the total population than in the state, nation, and benchmark communities (Table 4).

Table 4
Race Alone or in Combination & Ethnicity
by Percent of Total Population (2006-2008)[4]

	Bartlesville	Tulsa CSA	Houston TX	Kansas City MO-KS	Oklahoma	US
White	88.6%	81.4%	65.0%	83.0%	81.1%	76.2%
Black or African American	3.3%	9.5%	17.3%	12.6%	8.6%	13.1%
American Indian & Alaska Native	14.3%	11.2%	0.8%	1.4%	11.7%	1.5%
Asian	1.3%	1.8%	6.1%	2.4%	2.0%	4.9%
Native Hawaiian & Other Pacific Islander	na	0.2%	0.1%	0.2%	0.2%	0.3%
Some other race	2.0%	2.7%	12.3%	2.9%	3.0%	6.3%
Hispanic or Latino (of any race)	4.1%	7.0%	33.3%	7.0%	7.4%	15.1%

May exceed 100 percent due to race combinations.
Source: U.S. Census Bureau

Age

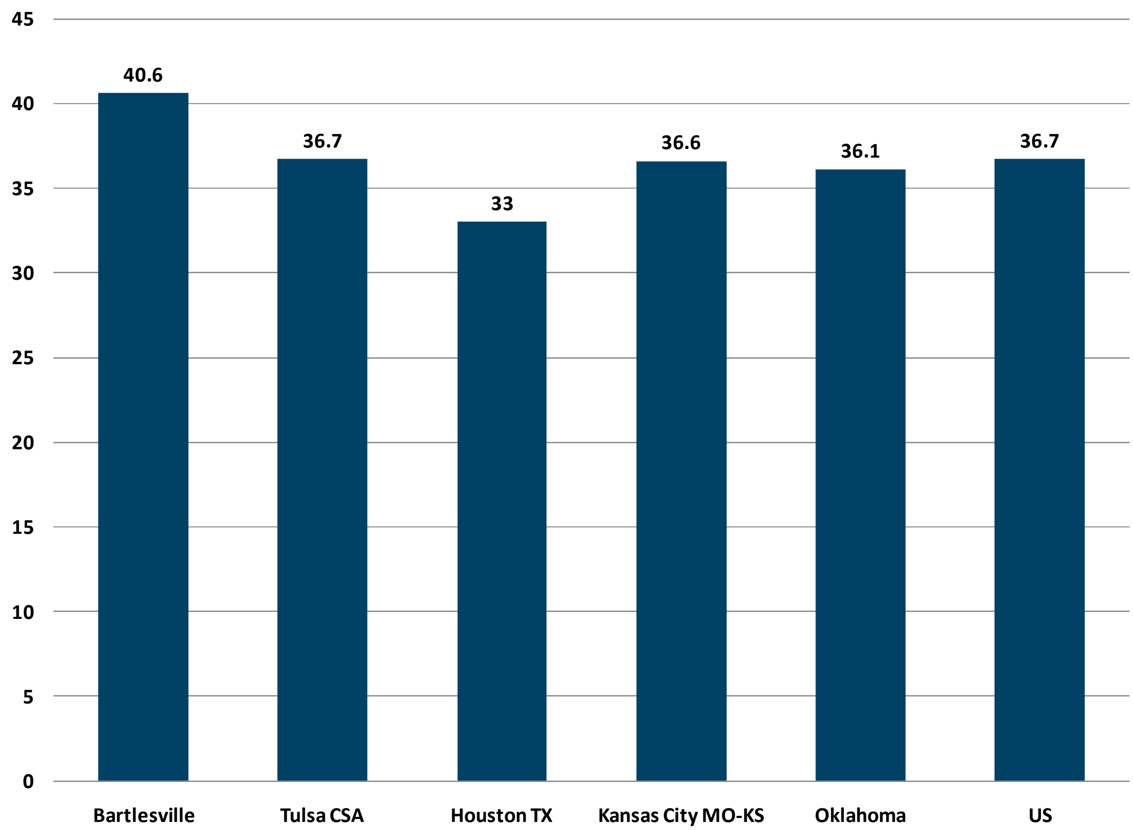
Median Age

At 40.6 years, the median age in Bartlesville is above the state, nation, and benchmark communities (Figure 4 and Table 5). The effect of the higher age can be observed in a

[4] Throughout this report data will be used from the Census Bureau's 2006-2008 American Community Survey (ACS). The three-year estimates are based on on-going data collected between January 2006 and December 2008. Data are largely collected by mail with Census Bureau field representatives following up by telephone and/or personal visit with addresses that do not respond. The multiyear estimates are used to reduce statistical margin of errors. This data is separate from the decennial census.

higher *old-age dependency ratio*,[5] exceeding the state, nation, and benchmark communities (Figure 5 and Table 6). The *child dependency ratio*[6] is lower than the state, and benchmark communities, but slightly above the nation.

Figure 4
Median Age (2006-2008)



Source: U.S. Census Bureau

5 A measure derived by dividing the population 65 years and over by the 18 to 64 years population and multiplying by 100.

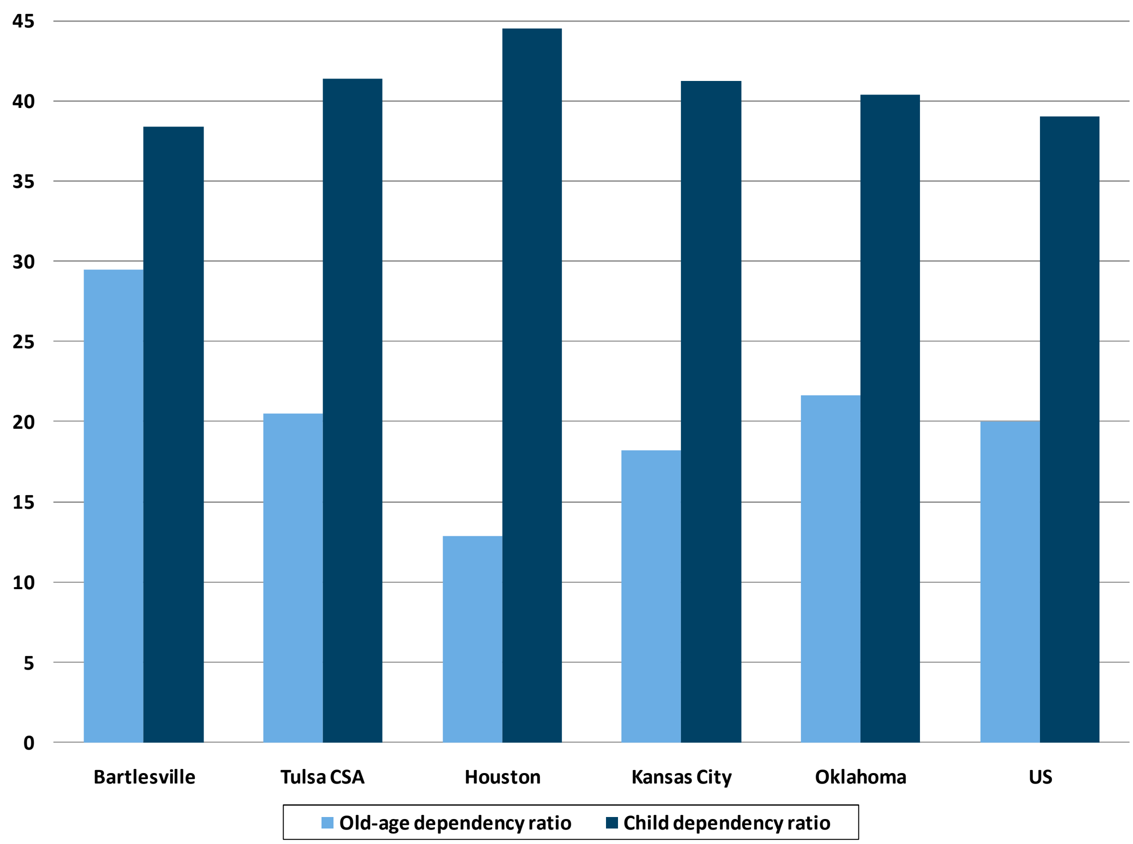
6 A measure derived by dividing the population under 18 years by the 18 to 64 years population and multiplying by 100.

Table 5
Median Age (2006-2008)

	Bartlesville	Tulsa CSA	Houston TX	Kansas City MO-KS	Oklahoma	US
Median age	40.6	36.7	33	36.6	36.1	36.7

Source: U.S. Census Bureau

Figure 5
Age Dependency Ratios (2006-2008)



Source: U.S. Census Bureau

Table 6
Age Dependency Ratios (2006-2008)

	Bartlesville	Tulsa CSA	Houston	Kansas City	Oklahoma	US
Old-age dependency ratio	29.5	20.5	12.9	18.2	21.6	20
Child dependency ratio	38.4	41.4	44.5	41.2	40.4	39

Source: U.S. Census Bureau

Age Groups

Generally, Bartlesville has a lower proportion of its population ages 44 and below (Table 7). Ages less than 15 are particularly underrepresented, averaging 3.4 percentage points below the other geographies. Age groups 55 and older comprise a higher proportion of total population in Bartlesville than in the other benchmark geographies, averaging 2 percentage points higher.

Table 7
Age Groups by Percent of Total (2006-2008)

	Bartlesville	Tulsa CSA	Houston	Kansas City	Oklahoma	US
< 15 years	18.0%	21.2%	23.7%	21.4%	20.6%	20.3%
15 to 24 years	13.9%	13.5%	14.0%	12.8%	14.5%	14.1%
25 to 34 years	11.1%	13.2%	15.0%	13.5%	13.3%	13.4%
35 to 44 years	11.7%	13.5%	15.0%	14.7%	13.0%	14.3%
45 to 54 years	14.9%	14.6%	14.4%	15.2%	14.1%	14.6%
55 to 64 years	12.7%	11.4%	9.7%	11.0%	11.0%	10.8%
65 to 74 years	8.5%	6.7%	4.7%	5.9%	7.0%	6.5%
75 to 84 years	6.1%	4.3%	2.6%	4.0%	4.5%	4.4%
85 years +	3.0%	1.6%	0.9%	1.5%	1.7%	1.7%

Source: U.S. Census Bureau

Educational Attainment

Comparing levels of educational attainment reveals a largely mixed comparison among Bartlesville residents ages 25+ and other benchmark geographies. Worth noting, *bachelor degree* attainment is higher than the state, nation and two of the three benchmark communities, although *Graduate or professional degree* attainment is slightly lower than in all geographies (Table 8).

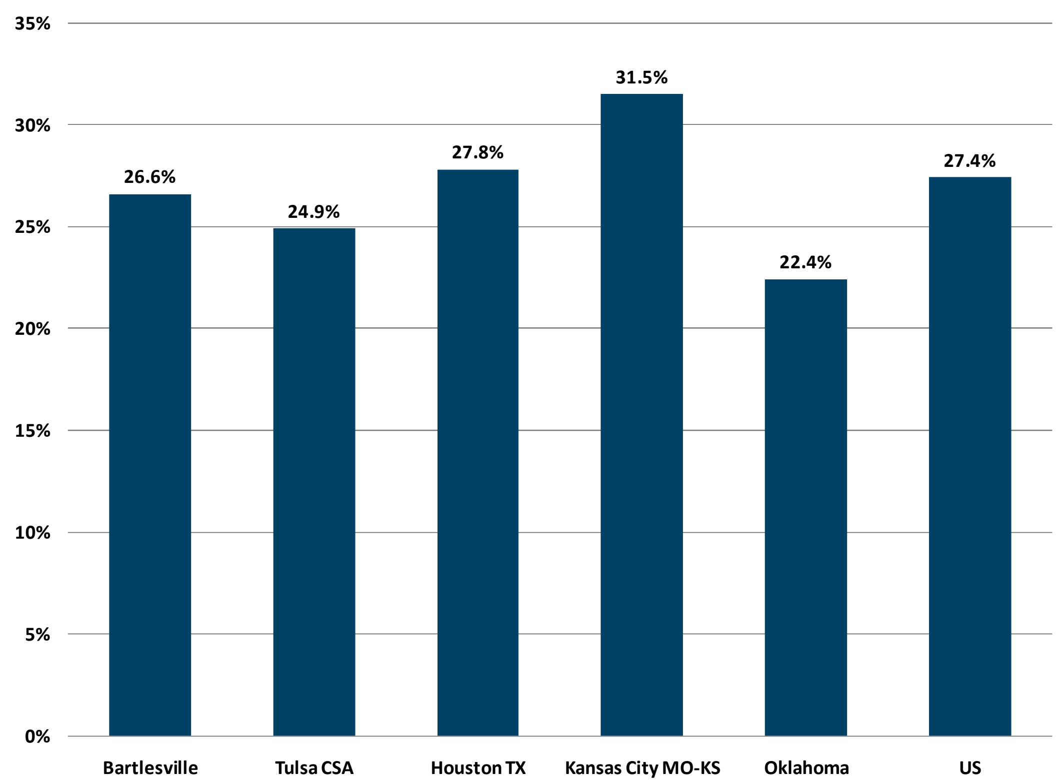
In summary, Bartlesville has a higher proportion of educational attainment *bachelor's degree or higher* than in the state and Tulsa CSA, but lower than in Houston, Kansas City, and slightly, the nation (Figure 6 and Table 9). At attainment of 87.6 percent, *High school graduate or higher* in Bartlesville is higher than all geographies except Kansas City.

Table 8
Educational Attainment
Percent Total, Age 25+ (2006-2008)

	Bartlesville	Tulsa CSA	Houston TX	Kansas City MO-KS	Oklahoma	US
Less than 9th grade	3.5%	4.3%	10.4%	3.1%	5.0%	6.4%
9th to 12th grade, no diploma	8.8%	8.7%	10.2%	6.9%	10.1%	9.1%
High school graduate (includes equivalency)	33.3%	31.3%	25.1%	28.9%	33.0%	29.6%
Some college, no degree	21.8%	22.8%	20.5%	22.5%	22.8%	20.1%
Associate's degree	5.9%	8.0%	6.0%	7.0%	6.7%	7.4%
Bachelor's degree	19.7%	17.2%	18.5%	20.7%	15.1%	17.3%
Graduate or professional degree	7.0%	7.7%	9.2%	10.8%	7.4%	10.1%

Source: U.S. Census Bureau

Figure 6
Bachelor's degree or higher
Percent of Population Age 25+ (2006-2008)



Source: U.S. Census Bureau

Table 9
Educational Attainment Summary
Percent Total, Age 25+ (2006-2008)

	Bartlesville	Tulsa CSA	Houston TX	Kansas City MO-KS	Oklahoma	US
Bachelor's degree or higher	26.6%	24.9%	27.8%	31.5%	22.4%	27.4%
High school graduate or higher	87.6%	87.0%	79.4%	90.0%	84.9%	84.5%

Source: U.S. Census Bureau

Public Education Indicators

Public education indicators are a means to measure education quality across various geographies. The national indicators are broad, and at best would indicate further examination at points of significant deviation (Table 10).

Table 10
Public Education Indicators

	Student/Teacher Ratio (07-08)	Total Current Expenditures Per Pupil (06-07)	Instructional Expenditures Per Pupil (06-07)
Bartlesville	15.1	$6,835	$4,222
Tulsa District	15.3	$8,061	$4,243
Houston	16.7	$7,994	$4,732
Kansas City	12.7	$11,854	$6,288
Oklahoma	13.7	$8,145	$4,289
US	15.5	$9,683	$5,903

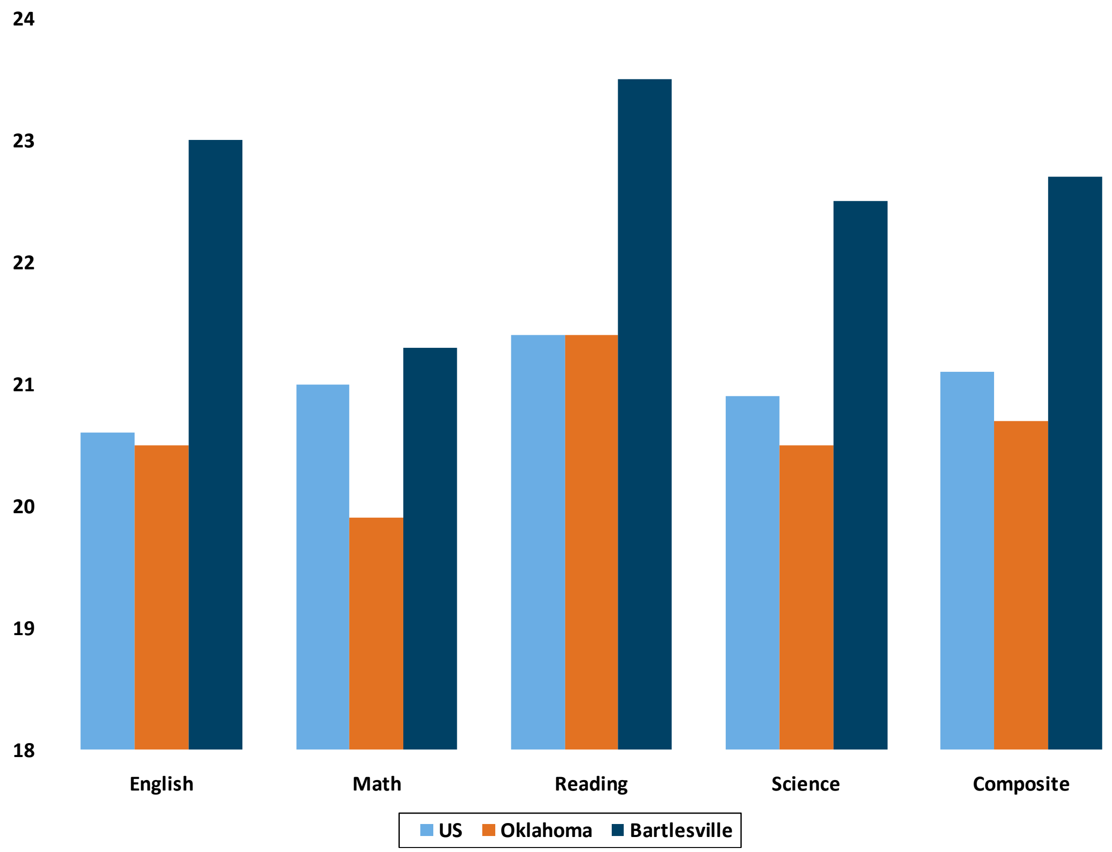
Source: National Center for Education Statistics

ACT Scores

The ACT (American College Testing) test is a standardized test for college admissions in the United States, and a widely excepted measure of education quality. ACT scores are especially relevant to businesses because they provide a measure of the "final product" of public schools, and the educational quality of those entering the workforce. Unfortunately ACT scores are not readily available for all school systems nationwide.

In 2009 ACT scores for Bartlesville High School were significantly above the state and nation (Figure 7 and Table 11). Bartlesville High's composite ACT scores ranked 16th among Oklahoma's 447 schools with published results.

Figure 7
2009 ACT Combined Scores



Source: Oklahoma State Department of Education

Table 11
2009 ACT Scores

	English	Math	Reading	Science	Composite
Bartlesville	23.0	21.3	23.5	22.5	22.7
Oklahoma	20.5	19.9	21.4	20.5	20.7
US	20.6	21.0	21.4	20.9	21.1

Source: Oklahoma State Department of Education

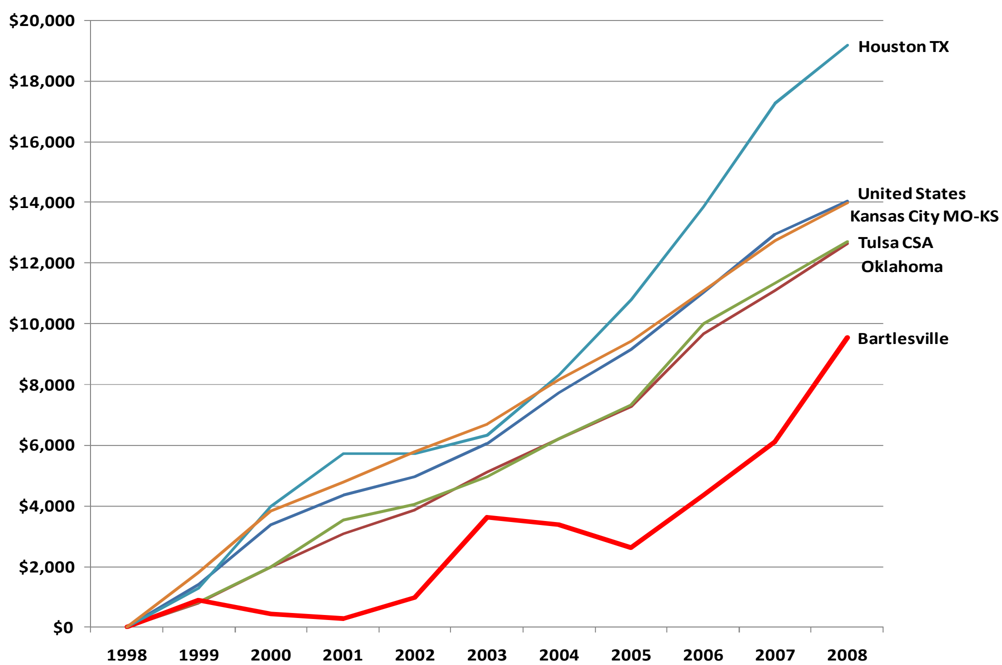
Economic Dynamics

Average Wage per Job

According to the U.S. Bureau of Economic Analysis, in 2008, Bartlesville's average wage per job equaled $40,728[7]. Bartlesville's current figure is 7 percent above the state and 12 percent below the nation. Over the last ten years, the nominal (unadjusted for inflation) average wage per job in Bartlesville has increased by 30.7 percent; the pace is below the state, nation, and benchmark communities (Figure 8 and Table 12). Over the five most recent years, the rate of growth is also below all the comparison geographies.

Correcting growth in the average wage per job to real values (adjusting for inflation) provides a more realistic view of the actual spending value of the wage dollars. Over the last ten years, the real (adjusted for inflation) average wage per job in Bartlesville has declined by 1.1 percent, and in the last five years has held to no change (Figure 9 and Table 13). The inflation adjusted ten and five-year rates of growth are below the state and nation.

Figure 8
Change in Average Wage per Job
Unadjusted for Inflation (0=1998)



Source: U.S. Bureau of Economic Analysis

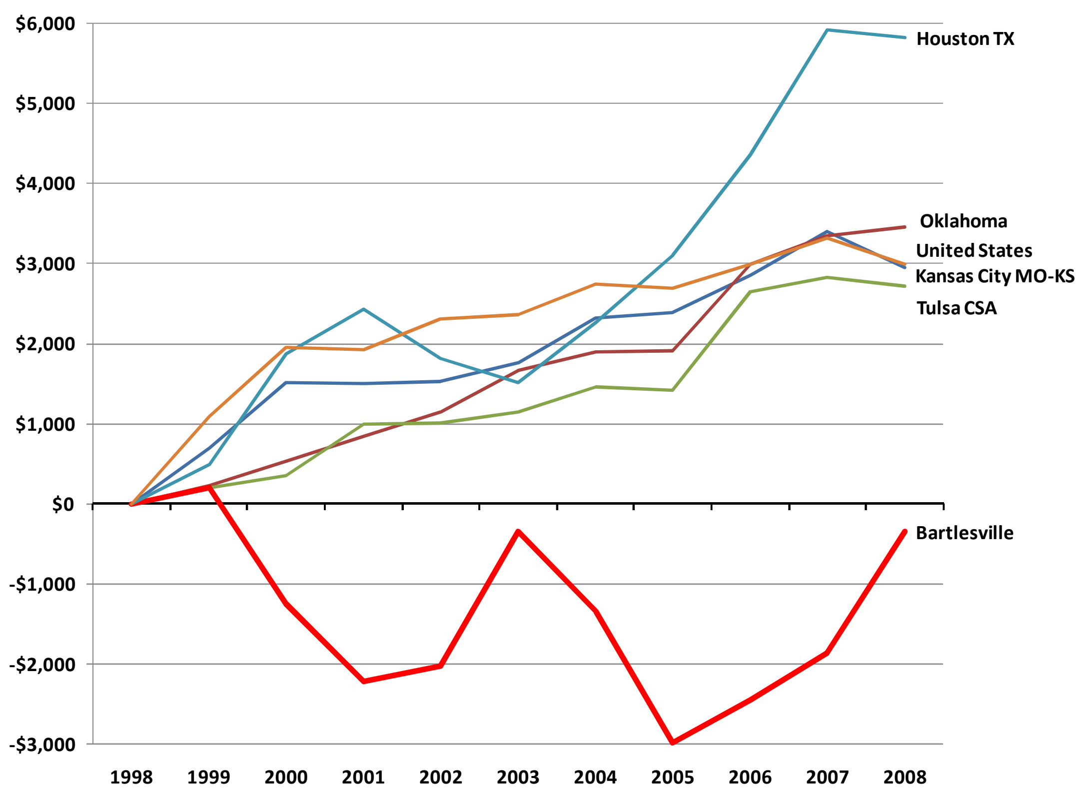
[7] Average wage per job is wage and salary disbursements divided by the number of wage and salary jobs (total wage and salary employment). Wage and salary disbursements consists of the monetary remuneration of employees, including the compensation of corporate officers; commissions, tips, and bonuses; and receipts in kind, or pay-in-kind, such as the meals furnished to the employees of restaurants.

Table 12
Average Wage per Job (unadjusted for inflation)

	2008	10-Year Net Change	10-Year Percent Change	5-Year Net Change	5-Year Percent Change
Bartlesville	$40,728	$9,557	30.7%	$5,935	17.1%
Tulsa CSA	$41,134	$12,709	44.7%	$7,746	23.2%
Houston TX	$54,923	$19,168	53.6%	$12,849	30.5%
Kansas City MO-KS	$45,263	$13,990	44.7%	$7,292	19.2%
Oklahoma	$37,836	$12,648	50.2%	$7,518	24.8%
United States	$45,716	$14,049	44.4%	$7,986	21.2%

Source: U.S. Bureau of Economic Analysis

Figure 9
Change in Average Wage per Job
Adjusted for Inflation (0=1998)



Source: U.S. Bureau of Economic Analysis

Table 13
Average Wage per Job Change
Adjusted for Inflation (0=1998)

	10-Year Net Change	10-Year Percent Change	5-Year Net Change	5-Year Percent Change
Bartlesville	-$337	-1.1%	$12	0.0%
Tulsa CSA	$2,716	9.6%	$1,564	5.3%
Houston TX	$5,826	16.3%	$4,309	11.6%
Kansas City MO-KS	$2,994	9.6%	$630	1.9%
Oklahoma	$3,457	13.7%	$1,787	6.7%
United States	$2,943	9.3%	$1,186	3.5%

Source: U.S. Bureau of Economic Analysis

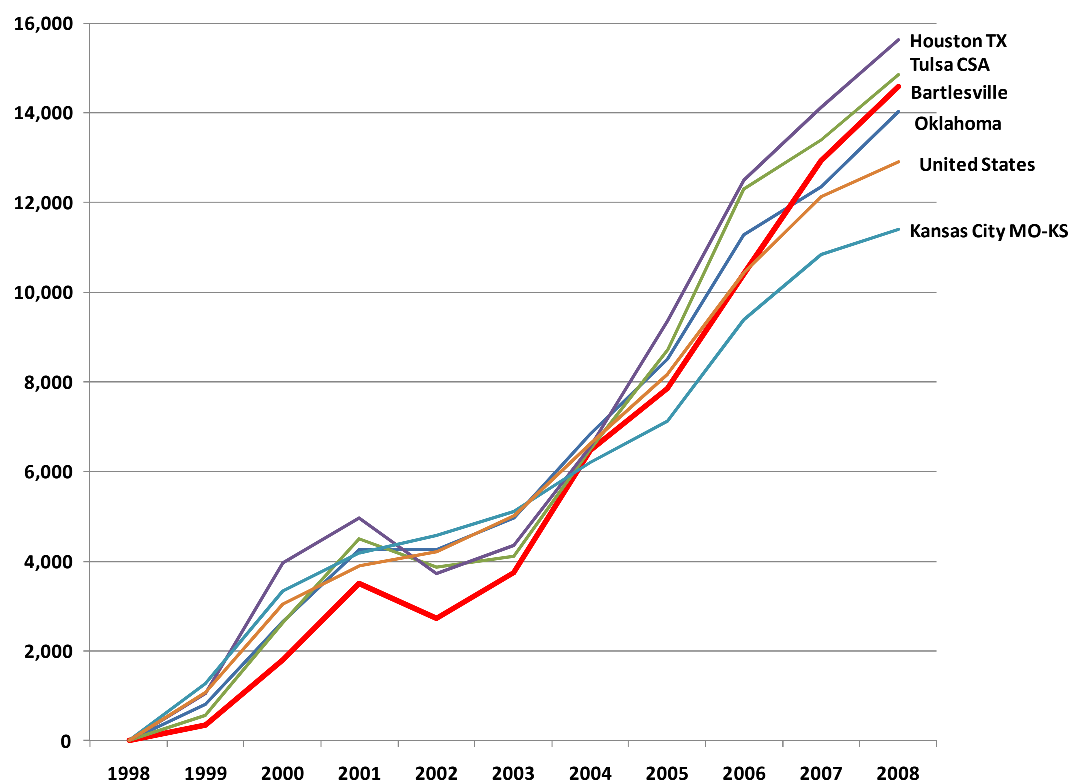
Per Capita Income

According to the U.S. Bureau of Economic Analysis, in 2008 Bartlesville's per capita income equaled $40,704[8]. Bartlesville's most current figure is 11.6 percent above the state and 1.3 percent above the nation. Over the last ten years, nominal (unadjusted for inflation) per capita income in Bartlesville has increased by 55.8 percent, and in the last five years by 36.2 percent. The ten year rate of growth is above the state, nation and Kansas City, while the five year rate is above all the other geographies (Figure 10 and Table 14).

Correcting the growth in per capita income to real values (adjusting for inflation) provides a more realistic view of the actual spending value of the income dollars. Over the last ten years, real (adjusted for inflation) per capita income in Bartlesville has increased by 17.9 percent, and in the last five years has experienced an increase of 16.4 percent (Figure 11 and Table 15). The ten year rate of growth outpaces all the geographies except Tulsa and the nation, and the five year rate outpaces all the other geographies.

[8] Per capita income is the income that is received by persons from all sources. It is calculated as the sum of wage and salary disbursements, supplements to wages and salaries, proprietors' income with inventory valuation and capital consumption adjustments, rental income of persons with capital consumption adjustment, personal dividend income, personal interest income, and personal current transfer receipts, less contributions for government social insurance. This measure of income is calculated as the personal income of the residents of a given area divided by the resident population of the area.

Figure 10
Per Capita Income Change
Unadjusted for Inflation (0=1998)



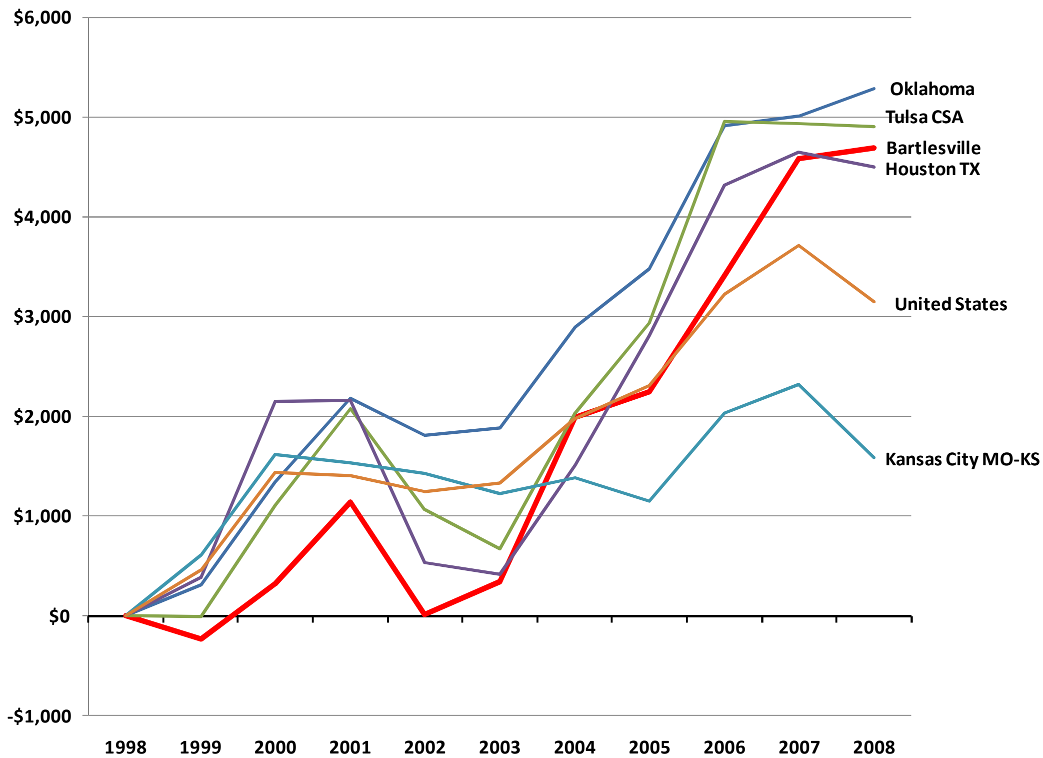
Source: U.S. Bureau of Economic Analysis

Table 14
Per Capita Income Change
Unadjusted for Inflation (0=1998)

	2008	10-Year Net Change	10-Year Percent Change	5-Year Net Change	5-Year Percent Change
Bartlesville	$40,704	$14,576	55.8%	$10,825	36.2%
Tulsa CSA	$40,967	$14,851	56.9%	$10,727	35.5%
Houston TX	$45,835	$15,629	51.7%	$11,270	32.6%
Kansas City MO-KS	$40,396	$11,401	39.3%	$6,280	18.4%
Oklahoma	$35,969	$14,020	63.9%	$9,060	33.7%
United States	$40,166	$12,908	47.4%	$7,895	24.5%

Source: U.S. Bureau of Economic Analysis

Figure 11
Per Capita Income Change
Adjusted for Inflation (0=1998)



Source: U.S. Bureau of Economic Analysis

Table 15
Per Capita Income Change
Adjusted for Inflation (0=1998)

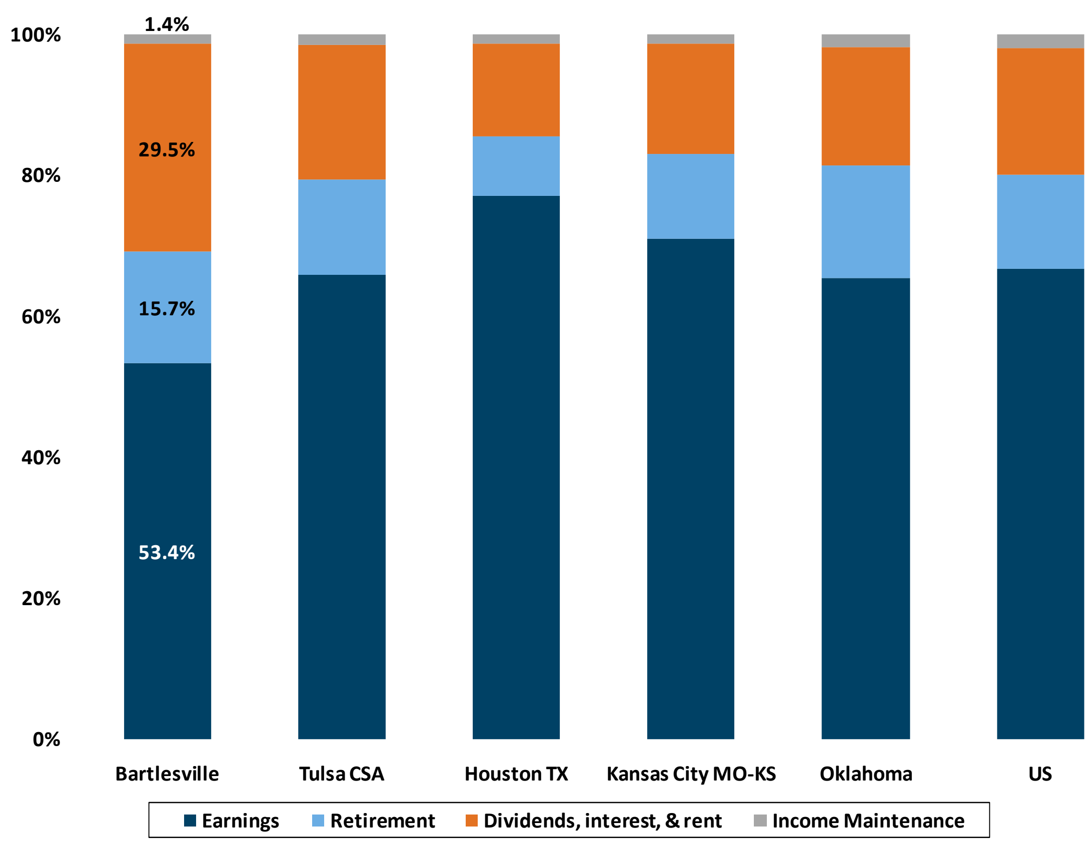
	10-Year Net Change	10-Year Percent Change	5-Year Net Change	5-Year Percent Change
Bartlesville	$4,688	17.9%	$4,347	16.4%
Tulsa CSA	$4,899	18.8%	$4,226	15.8%
Houston TX	$4,494	14.9%	$4,080	13.3%
Kansas City MO-KS	$1,588	5.5%	$360	1.2%
Oklahoma	$5,282	24.1%	$3,393	14.2%
United States	$3,151	11.6%	$1,821	6.4%

Source: U.S. Bureau of Economic Analysis

Components of Personal Income

An examination and comparison of the major sources that comprise personal income[9] shows that at 53.4 percent, Bartlesville has a significantly lower proportion of total income from earnings, 13.2 percentage points below the nation and 12 percentage points below the state (Figure 12 and Table 16). Likewise, at 29.5 percent, income from *Dividends, interest, & rent* make up a notably larger proportion of total income in Bartlesville relative to the state, nation and benchmark communities.

Figure 12
Components of Personal Income 2008
Percent of Total



Source: U.S. Bureau of Economic Analysis

[9] The four major components of income: 1) Earnings is the sum of wage and salary disbursements, supplements to wages and salaries, and proprietors' income, 2) Income Maintenance consists largely of supplemental security income payments, family assistance, food stamp payments, and other assistance payments, including general assistance, 3) Dividends, interest, and rent is divided payments (excluding dividends paid by mutual funds related to capital gains distributions) interest income, and rental property income and, 4) Retirement consists of retirement and disability insurance benefit payments, medical benefits, veterans benefit payments, federal education and training benefits, other government payments to individuals, government payments to nonprofit institutions, and business payments. Source: U.S. Bureau of Economic Analysis.

Table 16
Components of Personal Income 2008
Percent of Total

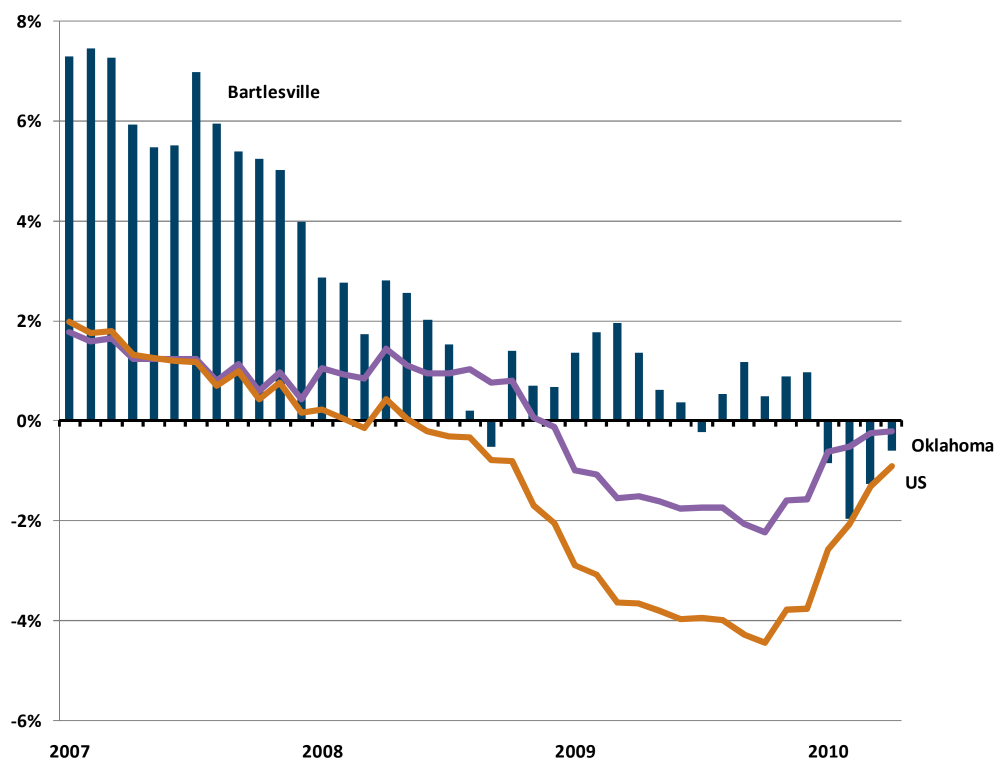
	Bartlesville	Tulsa CSA	Houston TX	Kansas City MO-KS	Oklahoma	US
Earnings	53.4	66.0	77.1	71.1	65.4	66.6
Retirement	15.7	13.5	8.4	12.1	15.9	13.4
Dividends, interest, & rent	29.5	19.1	13.2	15.6	16.9	18.0
Income Maintenance	1.4	1.4	1.3	1.3	1.8	1.9

Source: U.S. Bureau of Economic Analysis

Employment Trends

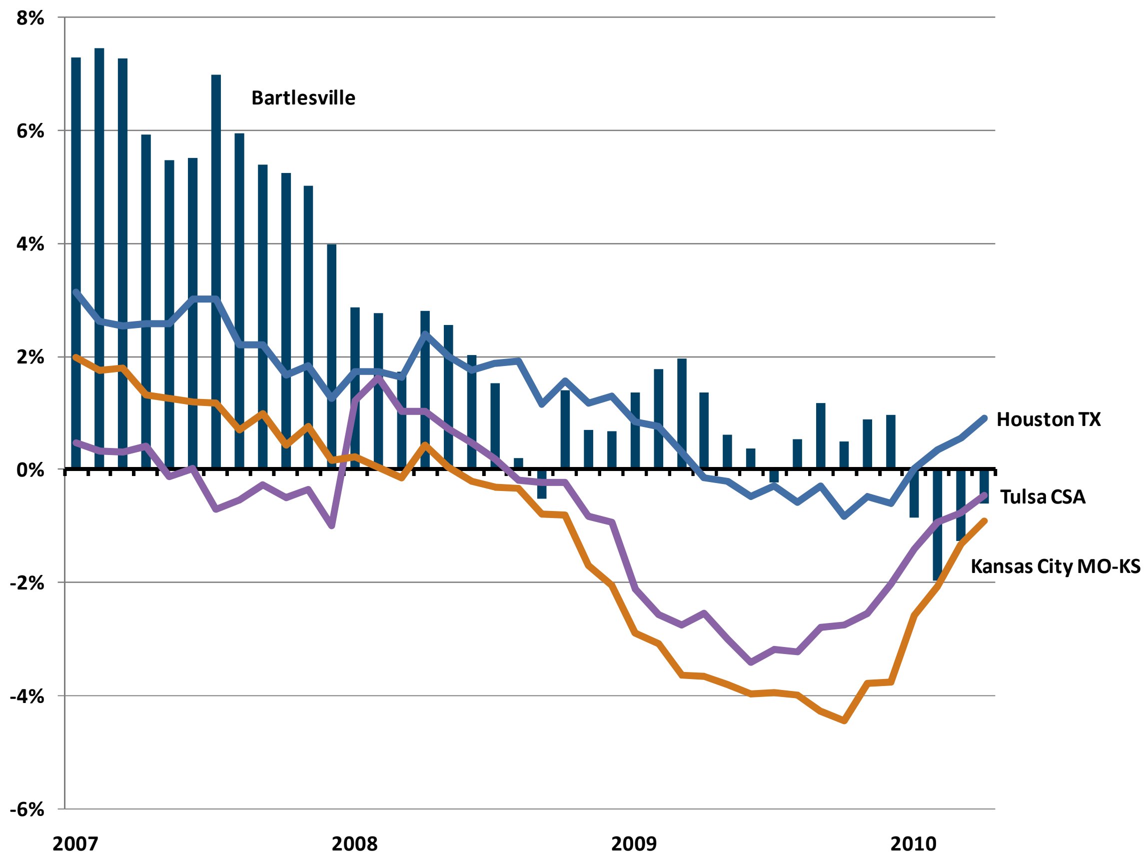
According to the Bureau of Labor Statistics, as of April 2010, total employment in Bartlesville equaled 26,832. April's employment number is down 0.6 percent or 162 fewer jobs than one-year earlier. Bartlesville has largely avoided the multi-year job losses of the current recession, having experienced only five months with year-to-year losses since 2007 (Figure 13 and 14). By contrast the U.S. has experienced 24 months of job losses, and Oklahoma 17. Bartlesville had the highest relative average employment growth rate in 2007 and 2009, and placed second only to Tulsa in 2008 (Table 17). Early 2010 trends show Bartlesville's growth rate below the state, Houston, and Tulsa.

Figure 13
Year-Year Change in Total Employment



Source: U.S. Bureau of Labor Statistics

Figure 14
Year-Year Change in Total Employment



Source: U.S. Bureau of Labor Statistics

Table 17
Average Percent Employment Change

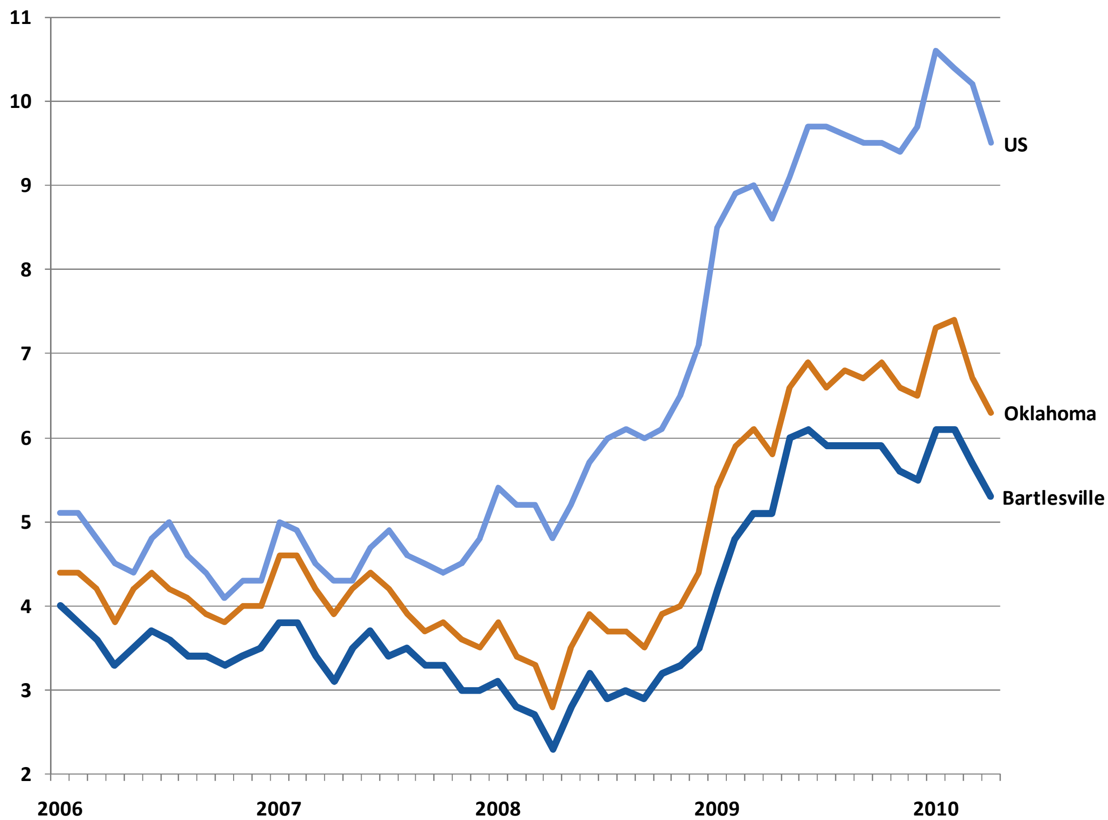
	2007	2008	2009	2010*
Bartlesville	6.0%	1.6%	0.9%	-1.2%
Tulsa CSA	-0.2%	0.3%	-2.7%	-0.9%
Houston TX	2.4%	1.7%	-0.2%	0.5%
Kansas City MO-KS	1.2%	-0.9%	-2.5%	-2.2%
Oklahoma	1.2%	0.8%	-1.6%	-0.4%
US	1.1%	-0.5%	-3.8%	-1.7%

**Through April*
Source: U.S. Bureau of Labor Statistics

Unemployment

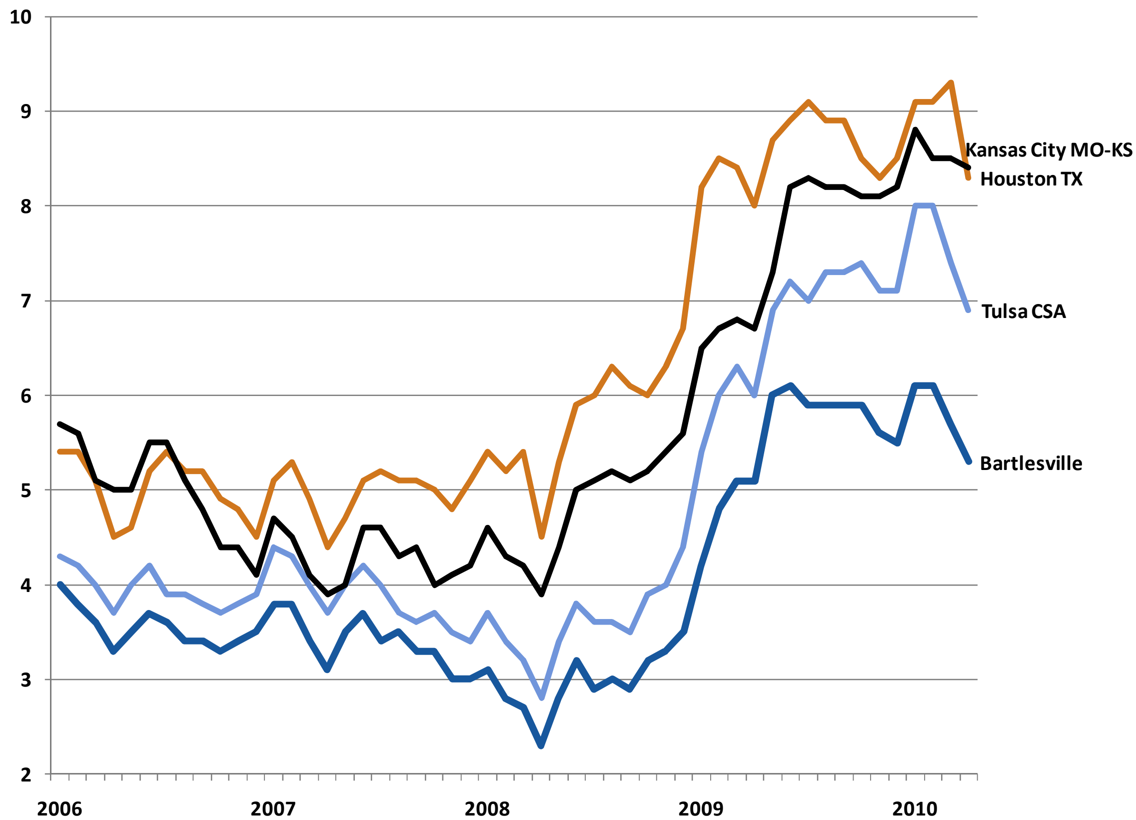
According to the Bureau of Labor Statistics, as of April 2010 the unemployment rate in Bartlesville stood at 5.3 percent, representing 1,507 unemployed workers. Since 2006 Bartlesville has held the lowest unemployment rate among the other benchmark geographies (Figure 15, 16 and Table 18).

Figure 15
Unemployment Rates



Source: U.S. Bureau of Labor Statistics

Figure 16
Unemployment Rates



Source: U.S. Bureau of Labor Statistics

Table 18
Average Unemployment Rate

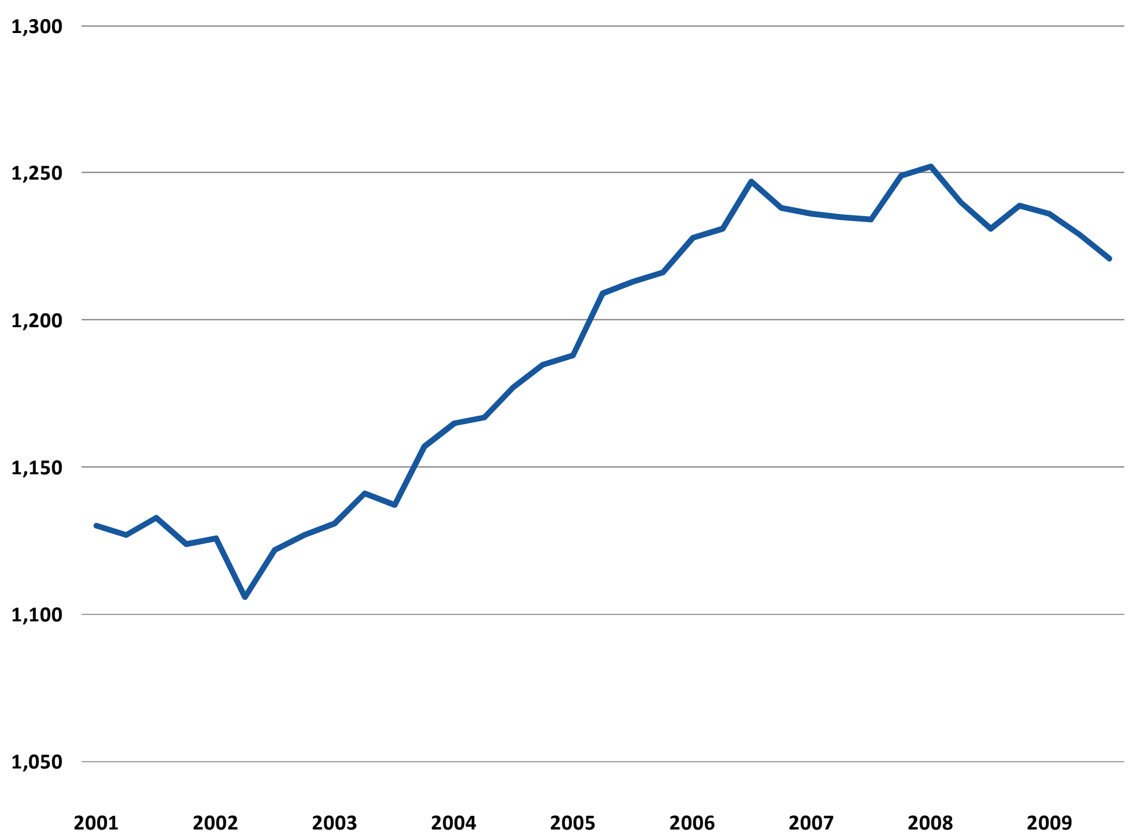
	2006	2007	2008	2009	2010*
Bartlesville	3.5	3.4	3.0	5.5	5.8
Tulsa CSA	4.0	3.9	3.6	6.8	7.6
Houston TX	5.0	4.3	4.8	7.6	8.6
Kansas City MO-KS	5.0	5.0	5.8	8.6	9.0
Oklahoma	4.1	4.1	3.7	6.4	6.9
US	4.6	4.6	5.8	9.3	10.2

**Through April*
Source: U.S. Bureau of Labor Statistics

Number of Private Business Establishments

Tracking the number of private business establishments is a broad indicator of entrepreneurial and attraction activity. The data does not include one-person businesses. As of the third quarter of 2009, there were 1,221 private business establishments in Bartlesville. The number of establishments peaked in the first quarter of 2008 at 1,252 and has since declined slightly by 2.5 percent or 31 fewer establishments (Figure 17). Over the last five-year period *Accommodation and Food Services* saw the largest increase in number of establishements, up 23 establisments to a total of 106 (Table 19). *Retail Trade* experinced the largest decline in number of establishments, down 15 to a total of 178.

Figure 17
Number of Private Business Establishments



Source: Bureau of Labor Statistics

Table 19
Five-Year Change in Business Establishments
By Industry Type

	2004 3Q	2009 3Q	5-Year Change	5-Year % Change
Agriculture	8	8	0	0.0%
Natural Resources	43	46	3	7.0%
Utilities	10	10	0	0.0%
Construction	119	131	12	10.1%
Manufacture	44	45	1	2.3%
Wholesale Trade	30	39	9	30.0%
Retail Trade	193	178	-15	-7.8%
Transportation and Warehousing	21	31	10	47.6%
Information	17	16	-1	-5.9%
Finance and Insurance	78	93	15	19.2%
Real Estate and Rental and Leasing	47	45	-2	-4.3%
Professional, Scientific and Technical Services	89	98	9	10.1%
Management of Companies and Enterprises	6	5	-1	-16.7%
Administrative & Waste Services	67	75	8	11.9%
Educational Services	9	13	4	44.4%
Health Care and Social Assistance	179	188	9	5.0%
Arts, Entertainment and Recreation	16	17	1	6.3%
Accommodation and Food Services	83	106	23	27.7%

Source: Oklahoma Employment Security Commission

Industrial Dynamics

Major Private Industry Composition

Examining the composition of major private industry employment relative to the other geographies, Bartlesville has a significantly larger proportion of employment in *Natural Resources and Mining* (Table 20). Conversely, Bartlesville has the smallest share in six of the remaining nine sectors.

Table 20
Industry Composition Percent of Total Private Employment
2009 Average

	Bartlesville	Tulsa MSA*	Houston TX	Kansas City MO-KS	Oklahoma	US
Natural Resources and Mining	21.3	2.1	4.3	0.2	4.7	1.7
Construction	2.9	6.0	8.7	5.4	5.9	5.6
Manufacturing	4.8	13.6	10.7	9.3	11.2	11.1
Trade, Transportation, and Utilities	22.8	23.7	24.0	24.0	23.8	23.0
Information	0.8	2.7	1.6	NA	2.3	2.6
Financial Activities	5.2	6.7	6.5	8.9	6.7	7.1
Professional and Business Services	10.8	15.7	16.8	NA	14.1	15.4
Education and Health Services	16.6	15.9	12.8	14.9	16.3	17.0
Leisure and Hospitality	11.0	10.7	11.0	11.8	12.0	12.2
Other	3.8	3.0	0.0	3.4	3.1	4.3

**Tulsa 7-countymetro, Tulsa CSA data unavailable*
Source: U.S. Bureau of Labor Statistics

Government Employment

Relative to the other benchmark geographies, Bartlesville has the lowest percentage of Federal and State Government employment, each comprising less than one percent of total employment (Table 21). Conversely, Bartlesville has the highest share of private employment at 87.7 percent.

Table 21
Government Employment
Percent of Total
2009 Average

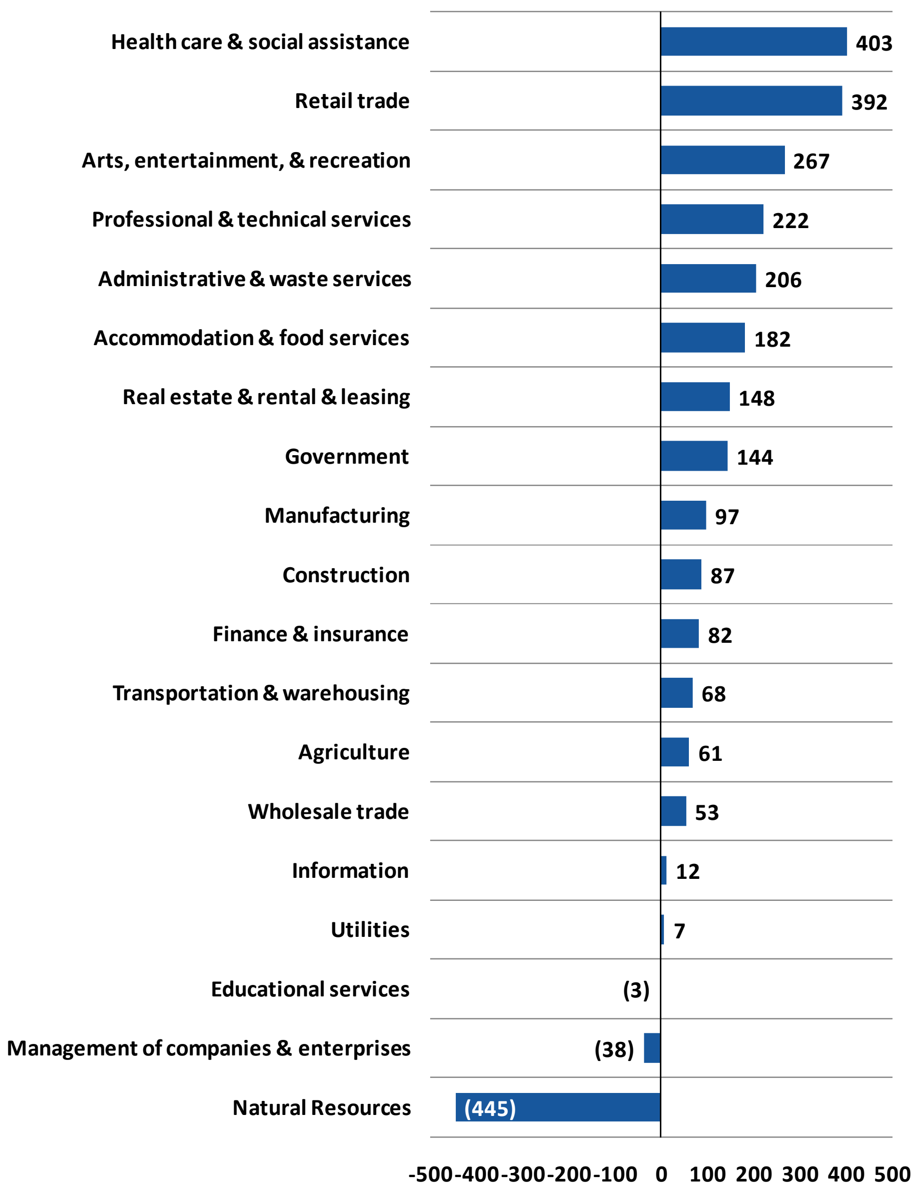
	Bartlesville	Tulsa MSA*	Houston TX	Kansas City MO-KS	Oklahoma	US
Federal Government	0.5	1.2	1.2	2.9	3.1	2.2
State Government	0.7	1.8	2.6	1.6	5.0	3.6
Local Government	11.1	10.1	10.5	11.9	13.3	10.9
Private	87.7	86.8	85.7	84.0	78.6	83.3

**Tulsa 7-county metro, Tulsa CSA data unavailable*
Source: U.S. Bureau of Labor Statistics

Major Industry Change

Over the last five years in Bartlesville, net employment growth was experienced in 16 of the 19 major industry sectors (Figure 18 and Table 22). Growth was led by *Healthcare & social services* and *Retail* sectors, with gains of 403 and 392 jobs respectively. Job losses have come primarily from the *Natrual Resources* sector, down by 445 jobs or 12 percent.

Figure 18
Change in Major Industry Employment
2005-2010 1Q



Source: Economic Modeling Specialist, Inc.

Table 22
Major Industry Employment Change
2005-2010 1Q

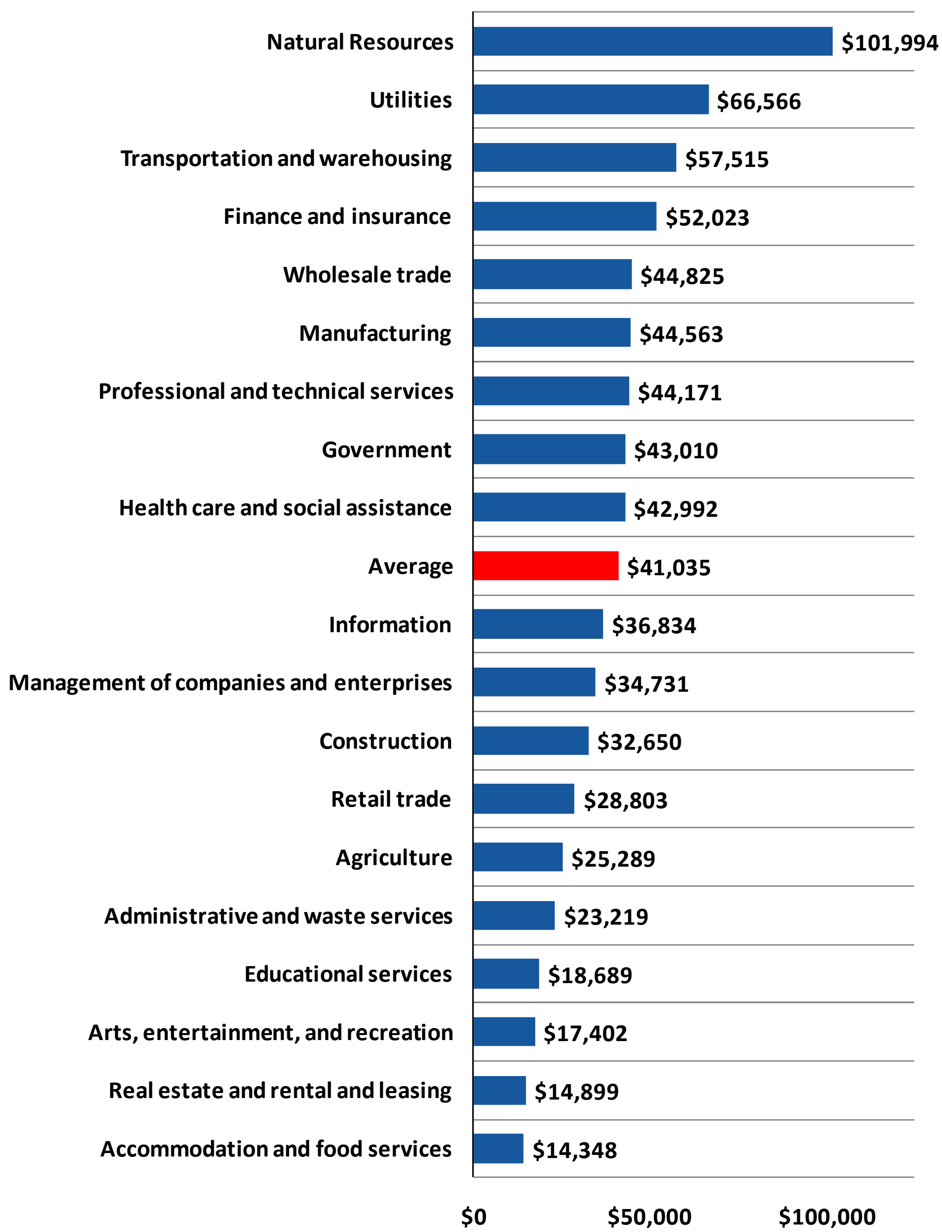
NAICS Code		2010 1Q Jobs	5-Y Change	5-Y % Change
62	Health care & social assistance	3,243	403	14%
44-45	Retail trade	4,291	392	10%
71	Arts, entertainment, & recreation	607	267	79%
54	Professional & technical services	1,242	222	22%
56	Administrative & waste services	1,840	206	13%
72	Accommodation & food services	1,921	182	10%
53	Real estate & rental & leasing	708	148	26%
90	Government	2,548	144	6%
31-33	Manufacturing	846	97	13%
23	Construction	1,207	87	8%
52	Finance & insurance	1,041	82	9%
48-49	Transportation & warehousing	426	68	19%
11	Agriculture	931	61	7%
42	Wholesale trade	392	53	16%
51	Information	225	12	6%
22	Utilities	220	7	3%
61	Educational services	439	-3	-1%
55	Management of companies & enterprises	98	-38	-28%
21	Natural Resources	3,159	-445	-12%

Source: Economic Modeling Specialist, Inc.

Major Industry Earnings

A wide difference exists between the highest earning industries and the lowest earning industries (Figure 19 and Table 23). Bartlesville's highest earning industry *Natural Resources*, is more than 600 percent above the lowest earning industries, *Accommodation and food services*

Figure 19
Average Annual Earnings by Major Industry 2010 1Q



Source: Economic Modeling Specialist, Inc.

Table 23
Average Annual Earnings by Major Industry 2010 1Q
Ranked by Earnings

NAICS Code		Average Annual Earnings Per Worker
21	Natural Resources	$101,994
22	Utilities	$66,566
48-49	Transportation and warehousing	$57,515
52	Finance and insurance	$52,023
42	Wholesale trade	$44,825
31-33	Manufacturing	$44,563
54	Professional and technical services	$44,171
90	Government	$43,010
62	Health care and social assistance	$42,992
	Average	$41,035
51	Information	$36,834
55	Management of companies and enterprises	$34,731
23	Construction	$32,650
44-45	Retail trade	$28,803
11	Agriculture	$25,289
56	Administrative and waste services	$23,219
61	Educational services	$18,689
71	Arts, entertainment, and recreation	$17,402
53	Real estate and rental and leasing	$14,899
72	Accommodation and food services	$14,348

Source: Economic Modeling Specialist, Inc.

INDUSTRIAL SPECIALIZATION

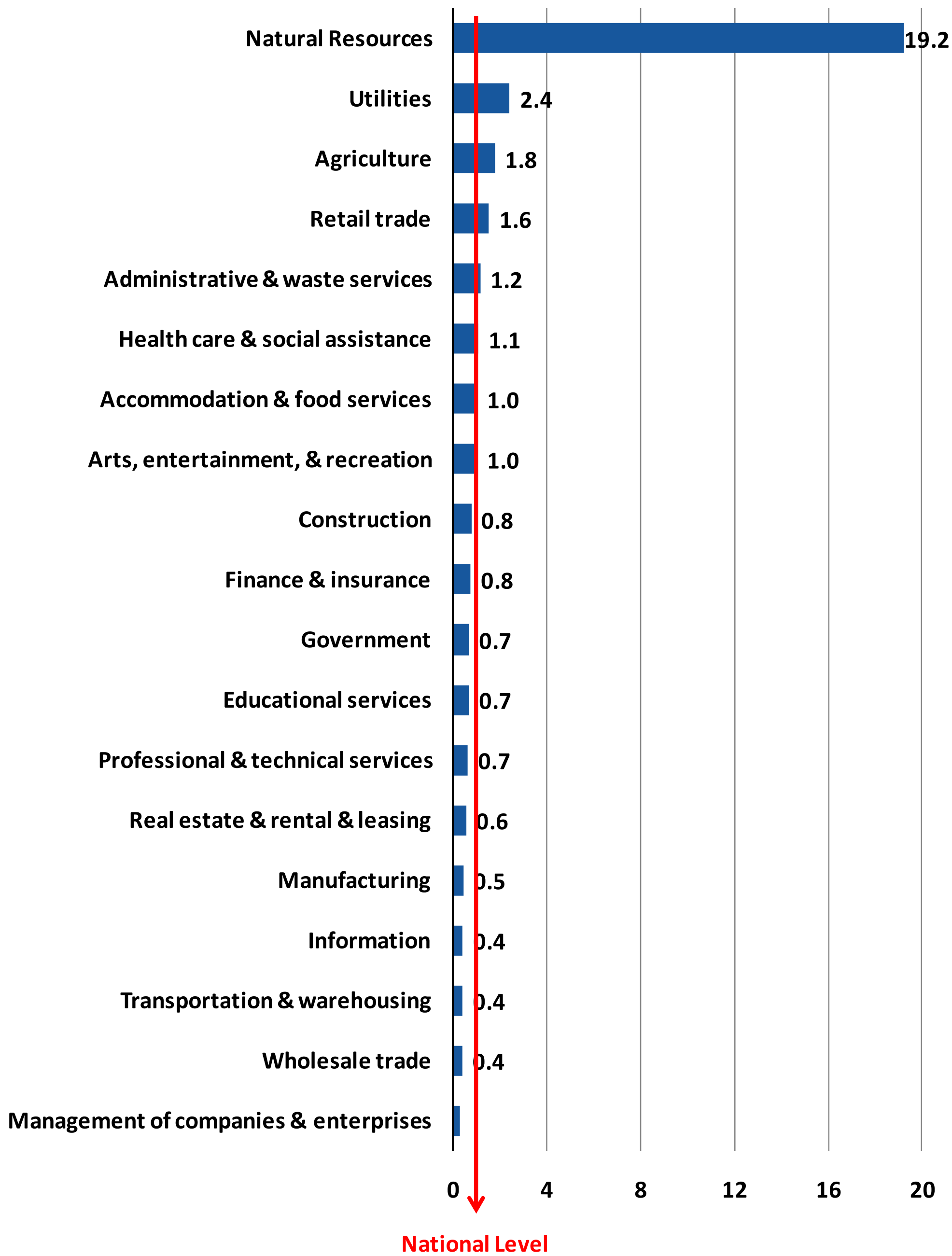
Industry Specialization Screening

The economy of Bartlesville has several areas of distinct industrial specialization. Specialization is identified by measuring industry employment concentration relative to the nation by means of location quotients (LQ).[10] The *Natural Resources* sector exhibits a very high degree of specialization, with a LQ of 19.2 (Figure 20 and Table 24). To a lesser degree, three other major industry sectors have high local specialization: *Utilities*, *Agriculture,* and *Retail*.

[10] To measure local specialization, location quotients (LQs) for each industry classification were derived. LQs are ratios of an area's distribution of employment for a specific industry compared to a reference or base area's distribution. In this analysis the reference area is the U.S. If an LQ is equal to 1, then the industry has the same share of its area employment as it does in the reference area. An LQ greater than 1 indicates an industry with a greater share of the local area employment than is the case in the reference area and implies local specialization. LQs are calculated by first, dividing local industry employment by the all industry total of local employment. Second, reference area industry employment is divided by the all industry total for the reference area. Finally, the local ratio is divided by the reference area ratio.

A comprehensive screen detailing indicators of specialization among industry **subsectors** in Bartlesville, including job growth trends, LQ, earnings and the number of firms is presented in Table 25. Highly specialized (LQ greater than 1.2), and high relative earnings (>$41,035, the industry average in Bartlesville) are highlighted in green.

Figure 20
Local Industry Specialization 2010 1Q



Source: Economic Modeling Specialists, Inc.

Table 24
Local Industry Specialization 2010 1Q
Ranked by Degree of Specialization

NAICS Code		LQ
21	Natural Resources	19.2
22	Utilities	2.4
11	Agriculture	1.8
44-45	Retail trade	1.6
56	Administrative and waste services	1.2
62	Health care and social assistance	1.1
71	Arts, entertainment, and recreation	1.0
72	Accommodation and food services	1.0
23	Construction	0.8
52	Finance and insurance	0.8
61	Educational services	0.7
90	Government	0.7
54	Professional and technical services	0.7
53	Real estate and rental and leasing	0.6
31-33	Manufacturing	0.5
51	Information	0.4
48-49	Transportation and warehousing	0.4
42	Wholesale trade	0.4
55	Management of companies and enterprises	0.3

Source: Economic Modeling Specialists, Inc.

Table 25
Industry Employment Detail

NAICS	Description	2010 1Q Jobs	5Y Change	5Y% Change	LQ	Average Earnings	Firms
11	**Agriculture**	**931**	**61**	**7%**	**1.8**	**$25,289**	**7**
110	Crop and animal production	866	37	4%	2.2	$25,876	7
115	Agriculture and forestry support activities	45	14	45%	0.5	$19,967	0
21	**Natural Resources**	**3,159**	**-445**	**-12%**	**19.2**	**$101,994**	**56**
211	Oil and gas extraction	2,528	-414	-14%	35.1	$107,870	32
212	Mining, except oil and gas	42	28	200%	1.1	$53,589	2
213	Support activities for mining	588	-59	-9%	11.3	$78,643	22
22	Utilities	220	7	3%	2.4	$66,566	7
23	**Construction**	**1,207**	**87**	**8%**	**0.8**	**$32,650**	**135**
236	Construction of buildings	291	-56	-16%	0.9	$39,059	36
237	Heavy and civil engineering construction	75	11	17%	0.4	$46,740	10
238	Specialty trade contractors	841	132	19%	0.8	$29,175	89
31-33	**Manufacturing**	**846**	**97**	**13%**	**0.5**	**$44,563**	**48**
311	Food manufacturing	52	14	37%	0.2	$44,512	4

NAICS	Description	2010 1Q Jobs	5Y Change	5Y% Change	LQ	Average Earnings	Firms
314	Textile product mills	90	5	6%	5.0	$31,426	2
323	Printing and related support activities	94	-80	-46%	1.1	$34,547	5
325	Chemical manufacturing	10	-21	-68%	0.1	$49,249	2
326	Plastics and rubber products manufacturing	14	0	0%	0.1	$24,492	1
327	Nonmetallic mineral product manufacturing	17	-9	-35%	0.3	$41,361	2
332	Fabricated metal product manufacturing	175	91	108%	0.8	$49,911	11
333	Machinery manufacturing	104	40	63%	0.7	$35,218	4
334	Computer and electronic product manufacturing	191	31	19%	1.1	$62,250	5
339	Miscellaneous manufacturing	48	4	9%	0.4	$36,362	3
42	**Wholesale trade**	**392**	**53**	**16%**	**0.4**	**$44,825**	**50**
423	Merchant wholesalers, durable goods	146	39	36%	0.3	$53,964	20
424	Merchant wholesalers, nondurable goods	55	-5	-8%	0.2	$45,829	8
425	Electronic markets and agents and brokers	192	20	12%	1.3	$37,273	21
44-45	**Retail trade**	**4,291**	**392**	**10%**	**1.6**	**$28,803**	**190**
441	Motor vehicle and parts dealers	388	-54	-12%	1.4	$43,804	25
442	Furniture and home furnishings stores	32	-11	-26%	0.4	$26,372	7
443	Electronics and appliance stores	46	-11	-19%	0.5	$29,878	12
444	Building material and garden supply stores	224	-8	-3%	1.2	$31,256	18
445	Food and beverage stores	250	-8	-3%	0.6	$21,934	15
446	Health and personal care stores	195	-19	-9%	1.1	$29,274	18
447	Gasoline stations	189	-3	-2%	1.4	$29,127	18
448	Clothing and clothing accessories stores	214	63	42%	0.9	$14,039	21
451	Sporting goods, hobby, book and music stores	163	11	7%	1.4	$13,884	14
452	General merchandise stores	2,131	497	30%	4.5	$32,573	23
453	Miscellaneous store retailers	235	-30	-11%	1.0	$17,118	15
454	Nonstore retailers	224	-35	-14%	0.9	$10,696	3
48-49	**Transportation and warehousing**	**426**	**68**	**19%**	**0.4**	**$57,515**	**52**
482	Rail transportation	25	3	14%	0.7	$92,857	0
484	Truck transportation	253	33	15%	0.8	$35,376	18
491	Postal service	89	10	13%	0.8	$77,030	28
492	Couriers and messengers	18	-2	-10%	0.1	$34,139	1
51	**Information**	**225**	**12**	**6%**	**0.4**	**$36,834**	**18**
511	Publishing industries, except Internet	26	-9	-26%	0.2	$15,931	0
512	Motion picture and sound recording industries	39	12	44%	0.5	$7,432	2
515	Broadcasting, except Internet	25	-15	-38%	0.5	$32,964	3
517	Telecommunications	84	-11	-12%	0.5	$61,631	10
518	ISPs, search portals, and data processing	47	34	262%	0.7	$28,602	2
52	**Finance and insurance**	**1,041**	**82**	**9%**	**0.8**	**$52,023**	**94**
522	Credit intermediation and related activities	448	85	23%	1.0	$49,939	35
523	Securities, commodity contracts, investments	245	-38	-13%	0.6	$39,114	25

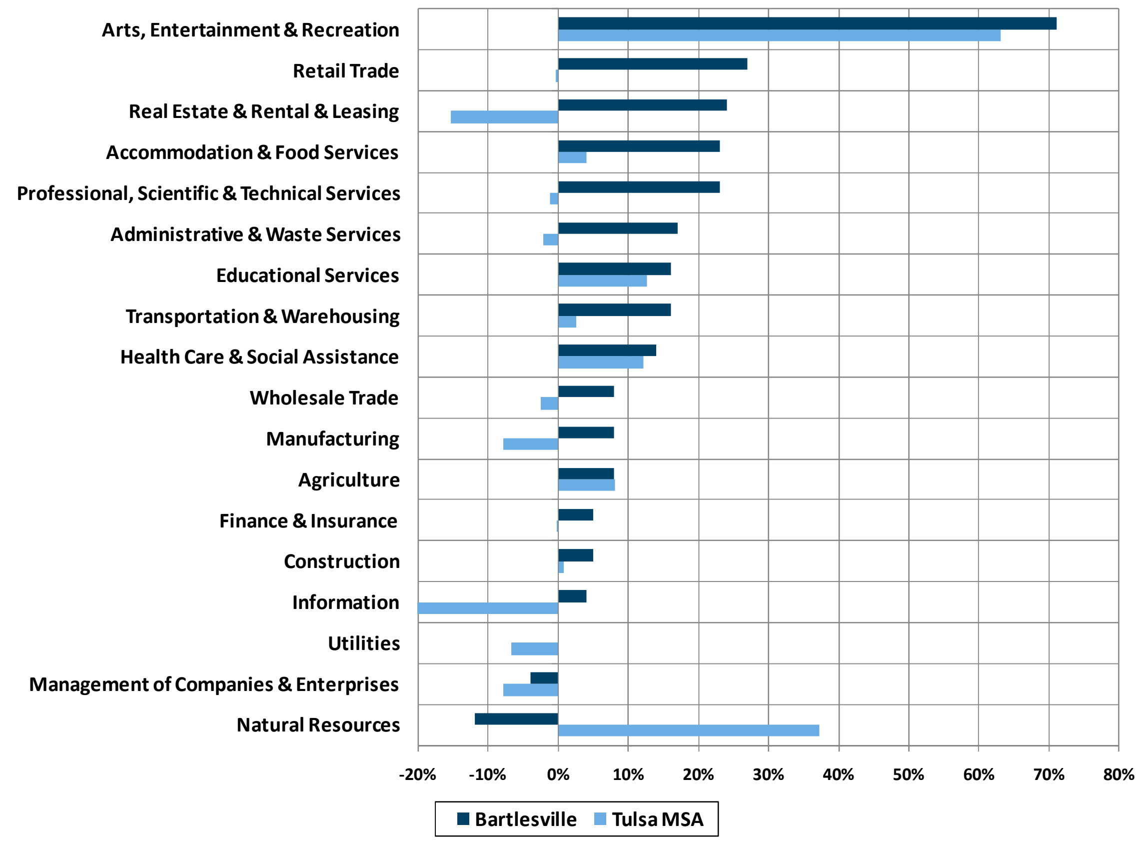
NAICS	Description	2010 1Q Jobs	5Y Change	5Y% Change	LQ	Average Earnings	Firms
524	Insurance carriers and related activities	194	-20	-9%	0.4	$50,694	29
525	Funds, trusts, and other financial vehicles	153	54	55%	2.5	$82,462	4
53	**Real estate and rental and leasing**	**708**	**148**	**26%**	**0.6**	**$14,899**	**43**
531	Real estate	634	141	29%	0.6	$10,064	31
532	Rental and leasing services	67	3	5%	0.6	$58,110	10
54	**Professional and technical services**	**1,242**	**222**	**22%**	**0.7**	**$44,171**	**116**
55	**Management of companies and enterprises**	**98**	**-38**	**-28%**	**0.3**	**$34,731**	**5**
56	**Administrative and waste services**	**1,840**	**206**	**13%**	**1.2**	**$23,219**	**82**
561	Administrative and support services	1,793	184	11%	1.2	$22,523	76
562	Waste management and remediation services	47	22	88%	0.8	$52,126	6
61	**Educational services**	**439**	**-3**	**-1%**	**0.7**	**$18,689**	**8**
62	**Health care and social assistance**	**3,243**	**403**	**14%**	**1.1**	**$42,992**	**191**
621	Ambulatory health care services	1,119	202	22%	1.0	$60,792	118
622	Hospitals	1,032	137	15%	1.4	$45,118	2
623	Nursing and residential care facilities	524	49	10%	1.1	$26,370	34
624	Social assistance	568	14	3%	0.9	$19,263	36
71	**Arts, entertainment, and recreation**	**607**	**267**	**79%**	**1.0**	**$17,402**	**16**
711	Performing arts and spectator sports	146	44	43%	0.5	$10,744	4
712	Museums, historical sites, zoos, and parks	24	-1	-4%	1.2	$41,439	1
713	Amusements, gambling, and recreation	437	224	105%	1.6	$18,297	10
72	**Accommodation and food services**	**1,921**	**182**	**10%**	**1.0**	**$14,348**	**103**
721	Accommodation	150	42	39%	0.5	$26,264	12
722	Food services and drinking places	1,771	140	9%	1.1	$13,372	91
81	**Other services, except public administration**	**1,627**	**-119**	**-7%**	**1.2**	**$20,565**	**108**
811	Repair and maintenance	224	-16	-7%	0.7	$31,177	26
812	Personal and laundry services	353	-29	-8%	1.1	$29,197	25
813	Membership associations and organizations	874	-48	-5%	1.8	$17,481	26
814	Private households	176	-27	-13%	0.6	$4,501	30
90	**Government**	**2,548**	**144**	**6%**	**0.7**	**$43,010**	**190**
911	Federal government, civilian, except postal service	13	-4	-24%	0.0	$79,516	22
912	Federal government, military	226	19	9%	0.7	$39,615	0
920	State government	140	-2	-1%	0.2	$45,824	40
930	Local government	2,169	131	6%	1.0	$42,965	128

Source: Economic Modeling Specialists, Inc.

Major Industry Competitive Advantage Screening

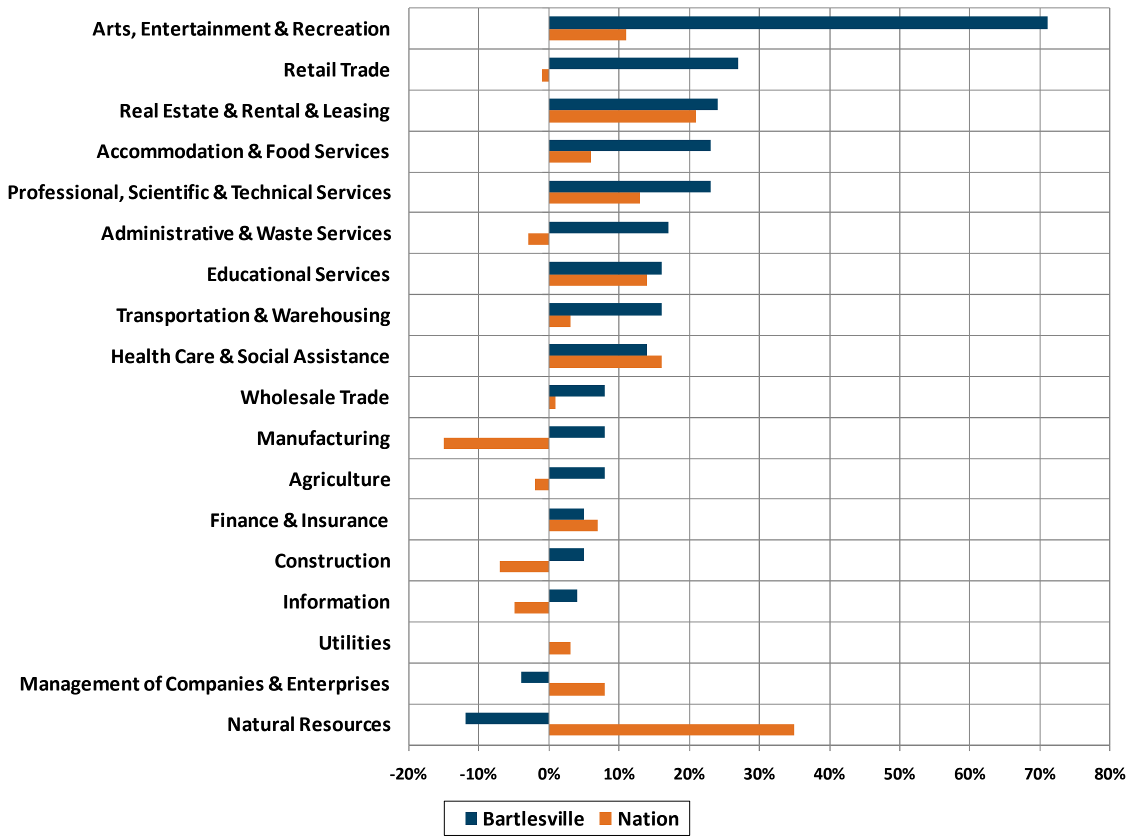
A comparison of major industry sector change between Bartlesville, the Tulsa MSA and the nation, reveals a majority (12 of 19) experienced employment growth rates that exceeded industry-specific trends in both the Tulsa MSA and nation (Figure 21 and 22). The analysis may indicate the presence of a unique competitive advantage for those industries in Bartlesville. The local *Natural Resources* sector, declined by 12 percent over the five-year period, in spite of a increases in both the Tulsa MSA and nation.

Figure 21
Bartlesville-Tulsa MSA
Industry Growth Comparison
2004-2009



Source: Economic Modeling Specialists, Inc.,
Oklahoma Employment Security Commission

Figure 22
Bartlesville-Nationwide
Industry Growth Comparison
2004-2009



Source: Economic Modeling Specialists, Inc,

LABOR MARKET ANALYSIS

Class of Worker

Relative to the state and nation, Bartlesville has a higher proportion of workers classified as *Self-employed workers in own (not incorporated business)*. Conversely, Bartlesville has a lower relative proportion of persons classified as *Government workers* (Table 26).

Table 26
Class of Worker (2006-2008)
By Percent of Total

	Bartlesville	Tulsa CSA	Houston TX	Kansas City MO-KS	Oklahoma	US
Private wage and salary workers	79.4	82.0	81.2	81.3	75.5	78.7
Government workers	10.5	11.0	11.7	12.9	16.6	14.5
Self-employed workers in own (not incorporated) business	9.9	6.7	6.9	5.7	7.6	6.6

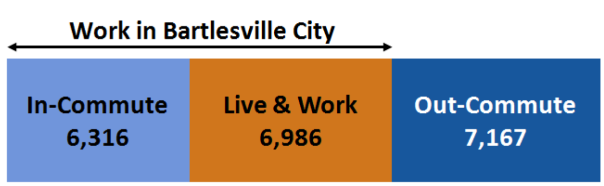
Source: U.S. Census Bureau

Worker Flows

In 2008, 52 percent (6,986) of workers in the City of Bartlesville also lived in the City. More than 7,100 workers who lived in Bartlesville City out-commuted for employment outside the area (Figure 23). Washington County residents who do not live within the City are the top source of in-commuters, supplying 12.7 percent or 1,689 of Bartlesville City's workforce (Table 27). Tulsa County is the top location for Bartlesville City's resident workers who out-commute for employment, attracting 2,913 Bartlesville residents (Table 28).

In 2008, 64 percent (10,287) of workers in Washington County also lived in Washington County. More than 8,800 workers who lived in Washington County out-commuted for employment outside the area (Figure 24). Tulsa County is the top source of in-commuters, supplying 7.7 percent or 1,222 of the county's workforce (Table 29). Tulsa County is also the top location for Washington County's resident workers who out-commute for employment, attracting 4,122 county residents (Table 30).

Figure 23
*Worker Flows 2008**



**Primary Jobs (one job per worker)*
Source: U.S. Census Bureau

Table 27
Top Counties Where Bartlesville City
Workers Live (in-commuters)
2008

	Workers	Percent
Bartlesville City	6,986	52.5%
Washington County, OK (outside City)	1,689	12.7%
Tulsa County, OK	936	7.0%
Osage County, OK	569	4.3%
Oklahoma County, OK	380	2.9%
Nowata County, OK	374	2.8%
Creek County, OK	192	1.4%
Rogers County, OK	183	1.4%
Wagoner County, OK	133	1.0%
Payne County, OK	131	1.0%

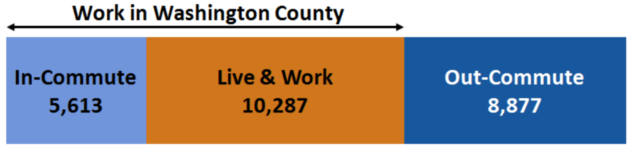
Source: U.S. Census Bureau

Table 28
Top Counties Where Bartlesville City
Residents Work (out-commuters)
2008

	Workers	Percent
Bartlesville City	6,986	49.4%
Washington County, OK (outside City)	905	6.4%
Tulsa County, OK	2,913	20.6%
Oklahoma County, OK	377	2.7%
Montgomery County, KS	287	2.0%
Rogers County, OK	277	2.0%
Osage County, OK	244	1.7%
Mayes County, OK	238	1.7%
Nowata County, OK	148	1.0%
Delaware County, OK	108	0.8%

Source: U.S. Census Bureau

Figure 24
*Worker Flows 2008**



**Primary Jobs (one job per worker) Source: U.S. Census Bureau*

Table 29
Top Counties Where Washington County
Workers Live (in-commuters), 2008

	Workers	Percent
Washington County, OK	10,287	64.7%
Tulsa County, OK	1,222	7.7%
Osage County, OK	653	4.1%
Nowata County, OK	437	2.7%
Oklahoma County, OK	423	2.7%
Rogers County, OK	232	1.5%
Creek County, OK	223	1.4%
Wagoner County, OK	172	1.1%
Payne County, OK	151	0.9%
Ottawa County, OK	150	0.9%

Source: U.S. Census Bureau

Table 30
Top Counties Where Washington County
Residents Work (out-commuters), 2008

	Workers	Percent
Washington County, OK	10,287	53.7%
Tulsa County, OK	4,122	21.5%
Oklahoma County, OK	545	2.8%
Montgomery County, KS	440	2.3%
Rogers County, OK	420	2.2%
Mayes County, OK	326	1.7%
Osage County, OK	324	1.7%
Nowata County, OK	202	1.1%
Cherokee County, OK	160	0.8%
Pontotoc County, OK	139	0.7%

Source: U.S. Census Bureau

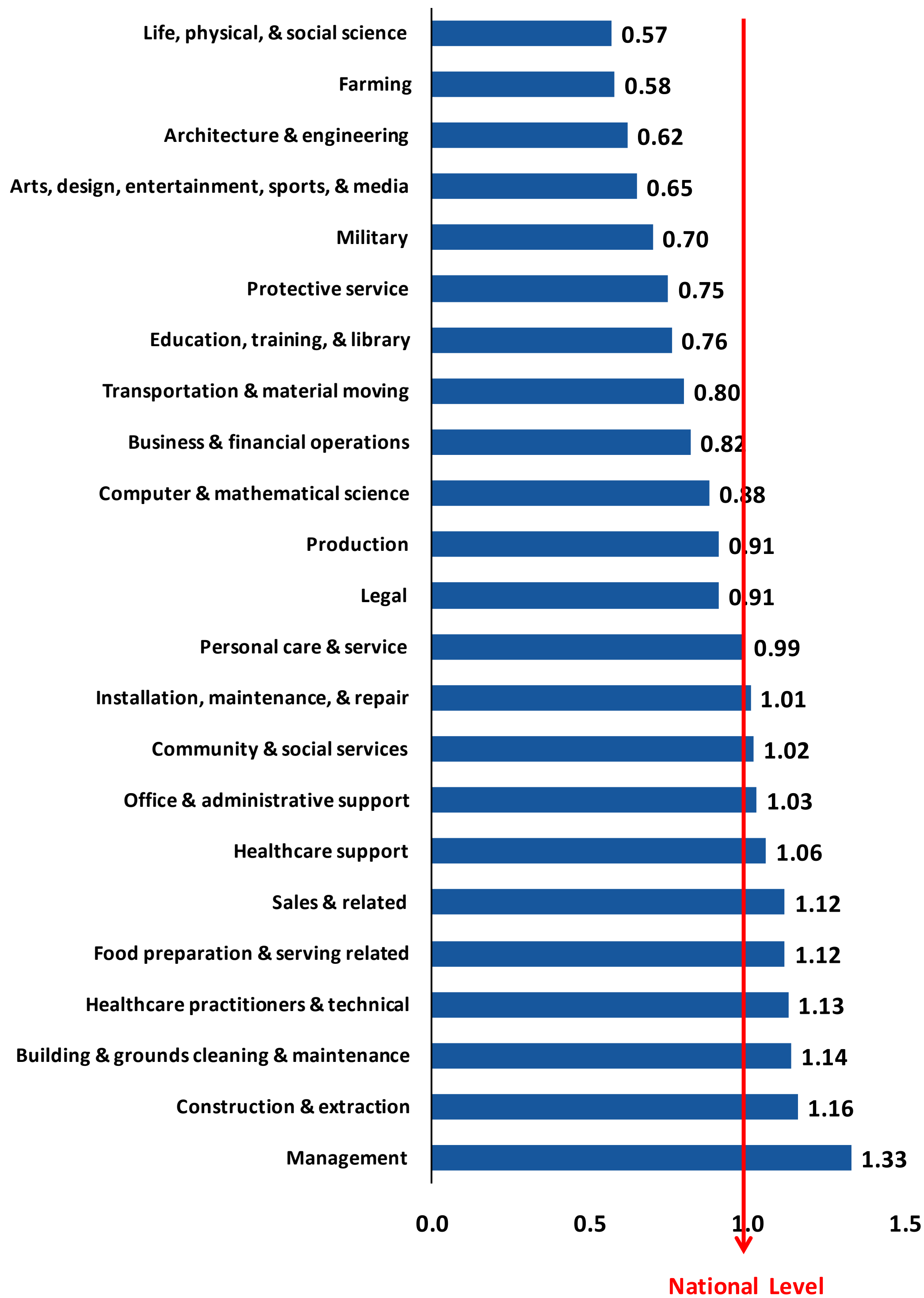
Occupational Specialization

Similar to industry specialization, occupations can be measured for high local concentration. Similar to the indusrial analysis, occupational specialization is identified by measuring *occupational* concentration relative to the nation by means of location quotients (LQ). Occupations with high location quotients (over 1.2) reflect a high degree of local specialization. These occupational strengths reflect a pool of specific workforce skills, education, or experiences. Among the 23 major occupational groups, Bartlesville exhibited strong local specialization in only one area, *Management* (Figure 25 and Table 31):

An examination of 84 occupational sub-groups in Bartlesville reveals 18 with high specialization, highlighted in **green** in Table 32. Generally, the strongest occupational specialization is clustered in *management*, *healthcare, office & administrative support, construction & extraction*, and *production*.

The Appendix list all 300+ occupations in Bartlesville and the degree of specialization for each.

Figure 25
Occupational Groups by Degree of specialization 2010 1Q



Source: Economic Modeling Specialists, Inc.

Table 31
Major Occupational Groups
Ranked by Degree of Specialization 2010 1Q

Major Occupational Group	2010 1Q Jobs	LQ	Median Hourly Earnings
Management	2,675	1.33	$20.85
Construction & extraction	1,531	1.16	$17.17
Building & grounds cleaning & maintenance	1,251	1.14	$7.73
Healthcare practitioners & technical	1,417	1.13	$32.07
Food preparation & serving related	2,035	1.12	$7.47
Sales & related	3,945	1.12	$10.72
Healthcare support	717	1.06	$11.91
Office & administrative support	3,913	1.03	$13.48
Community & social services	408	1.02	$11.64
Installation, maintenance, & repair	930	1.01	$17.58
Personal care & service	985	0.99	$9.08
Legal	203	0.91	$17.42
Production	1,315	0.91	$14.29
Computer & mathematical science	515	0.88	$31.27
Business & financial operations	1,141	0.82	$26.14
Transportation & material moving	1,255	0.80	$15.24
Education, training, & library	1,183	0.76	$15.27
Protective service	379	0.75	$11.79
Military	226	0.70	$8.53
Arts, design, entertainment, sports, & media	495	0.65	$10.21
Architecture & engineering	253	0.62	$29.28
Farming	28	0.58	$10.27
Life, physical, & social science	158	0.57	$23.53

Source: Economic Modeling Specialists, Inc.

Table 32
Occupation Sub-Group Details 2010 1Q

SOC Code	Occupation	Jobs	5Y Change	5Y % Change	LQ	Median Hourly Earnings
11-0000	**Management**	**2,675**	**118**	**5%**	**1.33**	**$20.85**
11-1000	Top executives	702	-20	-3%	1.50	$35.01
11-2000	Advertising, marketing, public relations, & sales managers	69	3	5%	0.65	$24.12
11-3000	Operations specialties managers	266	-9	-3%	1.02	$36.14
11-9000	Other management	1,638	143	10%	1.39	$12.18
13-0000	**Business & financial operations**	**1,141**	**17**	**2%**	**0.82**	**$26.14**
13-1000	Business operations specialists	376	7	2%	0.53	$21.48
13-2000	Financial specialists	765	10	1%	1.10	$28.42
15-0000	**Computer & mathematical science**	**515**	**31**	**6%**	**0.88**	**$31.27**
15-1000	Computer specialists	500	33	7%	0.89	$30.93
15-2000	Mathematical science	15	-1	-6%	0.76	$42.10
17-0000	**Architecture & engineering**	**253**	**21**	**9%**	**0.62**	**$29.28**
17-1000	Architects, surveyors, & cartographers	27	5	23%	0.64	$22.29

SOC Code	Occupation	Jobs	5Y Change	5Y % Change	LQ	Median Hourly Earnings
17-2000	Engineers	137	9	7%	0.56	$33.62
17-3000	Drafters, engineering, & mapping technicians	89	8	10%	0.72	$24.82
19-0000	**Life, physical, & social science**	**158**	**6**	**4%**	**0.57**	**$23.53**
19-2000	Physical scientists	58	3	5%	1.18	$29.90
19-3000	Social scientists & related	56	8	17%	0.43	$20.67
19-4000	Life, physical, & social science technicians	34	-4	-11%	0.65	$19.50
21-0000	**Community & social services**	**408**	**-11**	**-3%**	**1.02**	**$11.64**
21-1000	Counselors, social workers, & social service specialists	247	-4	-2%	0.76	$14.35
21-2000	Religious workers	162	-6	-4%	2.14	$7.61
23-0000	**Legal**	**203**	**-17**	**-8%**	**0.91**	**$17.42**
23-1000	Lawyers, judges, & related workers	59	12	26%	0.41	$19.03
23-2000	Legal support workers	144	-29	-17%	1.81	$16.78
25-0000	**Education, training, & library**	**1,183**	**53**	**5%**	**0.76**	**$15.27**
25-1000	Postsecondary teachers	81	3	4%	0.33	$20.70
25-2000	Primary, secondary, & special education teachers	667	30	5%	0.86	$18.60
25-3000	Other teachers & instructors	161	11	7%	0.72	$8.40
25-4000	Librarians, curators, & archivists	30	1	3%	0.61	$12.74
25-9000	Other education, training, & library	243	6	3%	0.91	$9.27
27-0000	**Arts, design, entertainment, sports, & media**	**495**	**90**	**22%**	**0.65**	**$10.21**
27-1000	Art & design	160	35	28%	0.73	$10.43
27-2000	Entertainers & performers, sports & related	133	16	14%	0.72	$9.78
27-3000	Media & communication	120	25	26%	0.59	$10.98
27-4000	Media & communication equipment	82	13	19%	0.55	$9.43
29-0000	**Healthcare practitioners & technical**	**1,417**	**167**	**13%**	**1.13**	**$32.07**
29-1000	Health diagnosing & treating practitioners	810	117	17%	1.00	$43.77
29-2000	Health technologists & technicians	541	51	10%	1.26	$15.96
29-9000	Other healthcare practitioners & technical	66	-1	-1%	2.90	$21.08
31-0000	**Healthcare support**	**717**	**107**	**18%**	**1.06**	**$11.91**
31-1000	Nursing, psychiatric, & home health aides	451	72	19%	1.05	$10.10
31-2000	Occupational & physical therapist assistants & aides	40	11	38%	1.67	$19.34
31-9000	Other healthcare support	226	24	12%	1.02	$14.20
33-0000	**Protective service**	**379**	**34**	**10%**	**0.75**	**$11.79**
33-1000	First-line supervisors/managers, protective service workers	21	2	11%	0.54	$20.63
33-2000	Fire fighting & prevention workers	36	2	6%	0.72	$14.14
33-3000	Law enforcement workers	102	6	6%	0.55	$12.98
33-9000	Other protective service workers	220	24	12%	0.95	$10.05
35-0000	**Food preparation & serving related**	**2,035**	**189**	**10%**	**1.12**	**$7.47**
35-1000	Supervisors, food preparation & serving workers	203	13	7%	1.28	$8.95
35-2000	Cooks & food preparation workers	646	52	9%	1.38	$7.37
35-3000	Food & beverage serving workers	960	101	12%	0.97	$7.26
35-9000	Other food preparation & serving related workers	225	23	11%	1.08	$7.25
37-0000	**Building & grounds cleaning & maintenance**	**1,251**	**212**	**20%**	**1.14**	**$7.73**
37-1000	Supervisors, building & grounds, cleaning workers	107	24	29%	1.22	$9.45
37-2000	Building cleaning & pest control workers	904	113	14%	1.13	$7.34
37-3000	Grounds maintenance workers	240	75	45%	1.12	$8.47
39-0000	**Personal care & service**	**985**	**105**	**12%**	**0.99**	**$9.08**
39-1000	Supervisors, personal care & service workers	38	6	19%	0.72	$11.70
39-2000	Animal care & service workers	57	8	16%	0.80	$11.36

SOC Code	Occupation	Jobs	5Y Change	5Y % Change	LQ	Median Hourly Earnings
39-3000	Entertainment attendants & related workers	143	47	49%	1.50	$8.10
39-5000	Personal appearance workers	115	4	4%	0.94	$10.73
39-6000	Transportation, tourism, & lodging attendants	35	0	0%	0.85	$10.78
39-9000	Other personal care & service workers	592	73	14%	0.98	$8.45
41-0000	**Sales & related**	**3,945**	**443**	**13%**	**1.12**	**$10.72**
41-1000	Supervisors, sales workers	574	22	4%	1.15	$13.74
41-2000	Retail sales workers	2,278	295	15%	1.62	$8.80
41-3000	Sales representatives, services	255	11	5%	0.64	$14.81
41-4000	Sales representatives, wholesale & manufacturing	201	20	11%	0.63	$21.51
41-9000	Other sales & related workers	638	96	18%	0.70	$9.77
43-0000	**Office & administrative support**	**3,913**	**221**	**6%**	**1.03**	**$13.48**
43-1000	Supervisors, office & administrative support workers	225	18	9%	0.94	$16.94
43-2000	Communications equipment operators	59	18	44%	2.12	$8.05
43-3000	Financial clerks	880	-9	-1%	1.40	$15.52
43-4000	Information & record clerks	793	142	22%	0.91	$10.61
43-5000	Material scheduling, dispatching, & distributing	762	84	12%	1.19	$12.26
43-6000	Secretaries & administrative assistants	694	-14	-2%	0.97	$15.36
43-9000	Other office & administrative support workers	500	-19	-4%	0.73	$12.70
45-0000	**Farming**	**28**	**8**	**40%**	**0.58**	**$10.27**
47-0000	**Construction & extraction**	**1,531**	**24**	**2%**	**1.16**	**$17.17**
47-1000	Supervisors, construction & extraction workers	253	2	1%	1.66	$24.76
47-2000	Construction trades & related workers	789	52	7%	0.79	$14.19
47-3000	Helpers, construction trades	35	0	0%	0.63	$9.93
47-4000	Other construction & related workers	64	9	16%	0.89	$14.43
47-5000	Extraction workers	389	-41	-10%	8.28	$19.34
49-0000	**Installation, maintenance, & repair**	**930**	**-22**	**-2%**	**1.01**	**$17.58**
49-1000	Supervisors of installation, maintenance, & repair workers	57	-1	-2%	0.86	$23.61
49-2000	Electrical & electronic equipment mechanics & repairers	43	-9	-17%	0.42	$18.89
49-3000	Vehicle & mobile equipment mechanics, installers, & repairers	285	-8	-3%	1.04	$14.42
49-9000	Other installation, maintenance, & repair	545	-5	-1%	1.14	$18.51
51-0000	**Production**	**1,315**	**8**	**1%**	**0.91**	**$14.29**
51-1000	Supervisors, production workers	127	-10	-7%	1.33	$28.18
51-2000	Assemblers & fabricators	238	44	23%	0.90	$11.51
51-3000	Food processing	48	0	0%	0.45	$9.26
51-4000	Metal workers & plastic workers	176	37	27%	0.61	$15.74
51-5000	Printing	52	-42	-45%	1.01	$11.70
51-6000	Textile, apparel, & furnishings	199	20	11%	1.44	$8.55
51-7000	Woodworkers	12	-3	-20%	0.25	$8.40
51-8000	Plant & system operators	170	-30	-15%	3.32	$17.69
51-9000	Other production	294	-7	-2%	0.74	$12.96
53-0000	**Transportation & material moving**	**1,255**	**-1**	**0%**	**0.80**	**$15.24**
53-1000	Supervisors, transportation & material moving workers	50	-4	-7%	0.80	$26.61
53-2000	Air transportation	12	1	9%	0.48	$37.03
53-3000	Motor vehicle operators	593	25	4%	0.82	$14.23
53-7000	Material moving	585	-26	-4%	0.86	$14.79
55-0000	**Military**	**226**	**19**	**9%**	**0.70**	**$8.53**

Source: Economic Modeling Specialists, Inc.

COMPETITIVE ASSESSMENT OVERVIEW

Our Assets and Challenges Assessment for Bartlesville centered on the principle of indentifying the strengths of the community to attract and retain investment so those assets can be marketed proactively. Likewise, we identified those challenges that may be impediments to growing the City economically, so that they may be remedied over time.

Garner Economics conducted an in depth analysis of Bartlesville using 85 screening factors or variables. This assessment is based on a review of economic and demographic characteristics, input from the BDC, interviews with local business and community leaders and the consulting team's experience working with communities across the country and corporate clients globally. This is normally the second step in a review of a City by a site selection consultant:

COMMUNITY ASSETS AND CHALLENGES ASSESSMENT FOR BARTLESVILLE

Date conducted: 04/21/2010

ACCESS TO MARKETS	Challenge[11]	Neutral[12]	Asset[13]
Centrally located for major regional market			✓
Centrally located for national market		✓	
Well positioned to serve international markets	✓ [14]		
Common carrier trucking		✓	
Interstate highways		✓ [15]	
Rail service		✓	
Port facilities	✓		
Scheduled airfreight services		✓	
Within 1 hour of commercial air passenger service		✓ [16]	
General aviation airport capable of handling corporate aircraft		✓	

[11] ***Challenge is defined as a weakness of a specific variable determined by Garner Economics either objectively or subjectively. A challenge is an impediment to economic development success.***

[12] ***Neutral is defined as a variable that is not a challenge to economic development but is considered normal in the realm of economic analysis.***

[13] ***Asset is defined by Garner Economics as a variable that is ranked exemplary and as such should be marketed or noted as such.***

[14] There are no port facilities in Bartlesville, including intermodal, which allow for the facilitation of international trade.

[15] US 75 runs N/S from Tulsa and is four lane, but not limited access.

[16] Tulsa International Airport is 45 minutes away.

Local telephone company's capacity for simultaneous voice/data transmission and high speed internet services		✓	
Connection of local telephone company to national fiber optics network		✓	
LABOR	Challenge	Neutral	Asset
Availability of unskilled and semi-skilled workers	✓ [17]		
Availability of skilled industrial workers		✓	
Availability of skilled clerical workers		✓	
Availability of technicians and scientists			✓ [18]
Availability of managerial personnel		✓	
Cost of labor		✓	
Quality of labor-management relations			✓
Availability of post-secondary vocational training			✓ [19]
Availability of on-the-job training assistance			✓
Within 1/2 hour of major university/college			✓ [20]
Availability of engineering program	✓		
Cooperation of local state employment office in recruiting and screening applicants		✓	
ACCESS TO RESOURCES	Challenge	Neutral	Asset
Availability of forest products	✓		
Availability of agricultural products for food processing			✓ [21]
Availability of minerals			✓
Availability of intermediate manufactured goods and supplies		✓	
Availability of manufacturing processes		✓	
Availability of business and professional services			✓ [22]
Cost of electricity for industrial use		✓	
Availability of high quality electric service		✓	

[17] In our interviews with local employers, each expressed frustration in the ability to recruit and retain employees that are paid a base wage of $12.00 or less per hour. All of the respondents said they had no difficulty finding labor at $20 per hour.
[18] ConocoPhillips has their research center in Bartlesville.
[19] Tri County Technology Center gets high marks from local employers.
[20] Bartlesville has both Oklahoma Wesleyan University and Rogers State University.
[21] Cattle and grain are prevalent in the region.
[22] ConocoPhillips has their global systems and services center in Bartlesville employing 2500 people.

Availability of uninterruptible natural gas		✓	
Availability of water/cost of water/sewer	✓ [23]		
LOCAL ECONOMIC DEVELOPMENT PROGRAM	Challenge	Neutral	Asset
Adequate level of professional staff		✓	
Involvement of both public and private sectors		✓	
Local economic development organization has a strategic plan			✓
Level of leadership support of economic development program			✓
Level of cooperation between various organizations involved in economic development activity		✓	
Level of awareness of community regarding economic development	✓ [24]		
Level of funding for local economic development program			✓ [25]
ACCESS TO SPACE	Challenge	Neutral	Asset
Availability of fully served and attractive industrial sites			✓
Availability of fully served and attractive office sites	✓		
Reasonably priced sites		✓	
Availability of suitable industrial space		✓	
Availability of suitable office space	✓ [26]		
ACCESS TO CAPITAL	Challenge	Neutral	Asset
Availability of tax-exempt financing for new industrial facilities		✓	
Availability of low interest loans for small business			✓
Availability of venture capital from local sources for business startups		✓	
GOVERNMENT IMPACT ON BUSINESS	Challenge	Neutral	Asset

[23] Lake Hulah is the primary water source and relies on rainfall to supply the Lake. It is susceptible to potential water disruptions based on rainfall.

[24] In our interviews with representatives from both the public and private sectors, there was a sense of not knowing what direction the BDC is going with its mission and role, and that there was a basic lack of understanding of what appropriate industry targets Bartlesville should pursue. The new staff leadership of the BDC gets high marks from our interview respondents

[25] The BDC derives its revenue from a dedicated sales tax approved by the voters.

[26] There is a limitation of available class A office available for lease or purchase.

Availability of adequate wastewater treatment capacity	✓ [27]		
Availability of adequate water and sewer lines to industrial sites		✓	
Condition and maintenance of local streets		✓	
Level of traffic-carrying capacity of local streets and highways		✓	
Availability of tax incentives		✓	
Availability of labor training incentives		✓	
Availability of relocation incentives for transferees			✓
Quality of local elementary and secondary education			✓ [28]
Quality of post-secondary education			✓ [29]
State and local environmental regulations		✓	
Business permitting procedures and costs		✓	
Zoning policies		✓	
Building codes		✓	
Local property taxes		✓	
State and local sales and use taxes service taxes		✓	
QUALITY OF LIFE	Challenge	Neutral	Asset
Availability of executive-level housing		✓	
Availability of moderate cost housing		✓	
Availability of apartments		✓	
Cost of housing		✓	

[27] There is a Consent Order for Sanitary Sewer Overflows (SSOs) in the collection system
[28] Sperling's 2010

Education	Bartlesville, OK	United States
School Expend.	$4,486	$6,058
Pupil/Teacher Ratio	15	15.9
Students per Librarian	593	907
Students per Counselor	358	546
2 yr College Grad.	6.07%	8.22%
4 yr College Grad.	19.44%	15.16%
Graduate Degrees	10.78%	7.16%
High School Grads.	86.24%	79.62%

[29] The local colleges and Tri County Technical Center all receive high marks from local employers and the interview respondents.

Level of crime		✓ [30]	
Level of cultural activity			✓
Availability of recreational opportunities		✓	
Presence of major sporting events	✓		
Level of air pollution		✓ [31]	
Quality of the climate		✓	
Attractiveness of the physical environment		✓	
General appearance of the community		✓	
Availability of major shopping facilities	✓		
Availability of adequate medical facilities		✓	
Availability of first-class hotels, motels, and resorts			✓
Variety of local restaurants	✓		
Appearance of the Central Business District			✓

There are compelling reasons why people and businesses are attracted to Bartlesville as their location of choice. There are few challenges (9) that evaluated overall, are not major impediments to economic growth in Bartlesville.

OPTIMAL INDUSTRY TARGETS FOR BARTLESVILLE

Optimal industry target selection is based on the site-specific characteristics of Bartlesville. Using results from the economic and competitive assessments, five industry targets were chosen that best match the unique competitive advantages in Bartlesville to the needs of particular industry sectors. Each sector selected has a record of above-average wages, and participation in commercial activities that will create wealth in Bartlesville.[32] Because economies are dynamic and impossible to predict, these five targets offer opportunities across several non-competing sectors, affording a means to diversify economic development strategies and avoid risky overconcentration.

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[30] Bartlesville, OK, violent crime, on a scale from 1 (low crime) to 10, is 3. Violent crime is composed of four offenses: murder and nonnegligent manslaughter, forcible rape, robbery, and aggravated assault. The US average is 3. Sperling's 2010.

Bartlesville, OK, property crime, on a scale from 1 (low) to 10, is 5. Property crime includes the offenses of burglary, larceny-theft, motor vehicle theft, and arson. The object of the theft-type offenses is the taking of money or property, but there is no force or threat of force against the victims. The US average is 3. Sperling's 2010.

[31] Air quality in Bartlesville, OK is 66 on a scale to 100 (higher is better). This is based on ozone alert days and number of pollutants in the air, as reported by the EPA.

[32] Local wealth creation is driven by exporting value-added products and services, or in some cases by importing outside dollars via activities such as tourism. All other activities, which primarily serve the local market, such as retail, would not be considered as viable industry targets for recruitment or expansion.

Bartlesville Optimal Targets

Technical Environmental Services	Distribution & Logistics	Shared Back-Office Services	Instrumentation Control Systems	Tourism Development

Subsector Targets

Technical Environmental Services	Distribution & Logistics	Shared Back-Office Services	Instrumentation Control Systems	Tourism Development
• Environmental consulting services • Scientific research and development services • Geophysical surveying and mapping services • Laboratory Testing Services • Self-employed Entrepreneurs	• Freight Packing & Logistics Services • General warehousing and storage • Refrigerated warehousing and storage • General wholesaling	• Office administrative services • Payroll & Bookkeeping Services • Computer systems design and related services	• Electronic instrument manufacturing • Industrial valve manufacturing • Electrical equipment manufacturing • Engineering services	• Cultural Tourism • Destination Tourism

Optimal Industry Targets

1. Technical/Environmental Services
2. Distribution & Logistics
3. Shared/Back-Office Services
4. Instrumentation/Control systems
5. Tourism

Technical/Environmental Services

Bartlesville is well positioned to leverage its local expertise in specialized energy-related research & development with the growing demand by government and private industry for technical/environmental consultation, interpretation and analysis. This industry lends itself well to self-employed entrepreneurs who can capitalize on skills developed within previous corporate employment.

Major Activities and Services:

Provide advice to businesses and governments on environmental issues, such as the control of environmental contamination from pollutants, toxic substances and hazardous materials.

Identify problems, measure and evaluate risks and recommend solutions.

Provide advice and assistance to businesses and other organizations on scientific and technical issues.

Gather, interpret, and map geophysical data.

Locate and measure the extent of subsurface resources, such as oil, gas, and minerals.

Perform physical, chemical and other analytical testing services for commercial purposes. Much of the testing in this sector involves the maintenance of environmental, industrial and product standards and government regulations.

Rationale:

- High local industry and occupational specialization
- Unique energy industry network/cluster
- Presence of ConocoPhillips research & development operations.
- Petroleum & Chemical Engineering Programs at University of Tulsa, University of Oklahoma Norman Campus, and Oklahoma State University-Main Campus
- Applied Technology program at Rogers State University
- Business incubator at Tri-County Technology Center for entrepreneurial development

Table 33
Technical/Environmental Services
U.S. Overview

Industry	NAICS Code	2010 National Employment	5-Year Projected Percent Change	National Earnings Per Workers
Environmental consulting services	54162	164,944	21%	$55,511
Scientific research and development services	5417	694,456	13%	$106,884
Geophysical surveying and mapping services	54136	23,498	21%	$68,264
Laboratory Testing Services	54138	152,641	7%	$73,457

Source: Economic Modeling Specialists Inc.

Shared/Back-Office Services

Bartlesville has a competitive advantage in performing various high-end Shared/Back-Office Services activities that are typically outsourced by firms seeking particular cost-savings or local expertise. Currently many industries are in a period of significant economic transformation; seeking fresh strategies and new efficiencies. The presence of ConocoPhillips IT services, high occupational specialization, and Bartlesville's unique geographic location all support Bartlesville as an attractive location for this industry.

Major Activities and Services:

Provide a range of day-to-day office administrative services to clients such as assistance with financial planning, billing and record keeping, personnel, and in physical distribution and logistics.

Provide expert advice and assistance in the fields of writing, modifying, testing and supporting software to meet the needs of a particular customer.

Provide outsourced payroll services for clients' employees, as well as basic bookkeeping services

Rationale:

- Existing local industry and occupational specialization
- Relatively low labor and land costs
- Nonurban location, reduced exposure to interruption
- Computer Science, Business Administration and Business/Commerce programs at Oklahoma Wesleyan University
- Business Information Technology programs at Rogers State University

Table 34
Shared/Back-Office Services
U.S. Overview

Industry	NAICS Code	2010 National Employment	5-Year Projected Percent Change	National Earnings Per Workers
Computer systems design and related services	5415	2,386,109	19%	$88,955
Office administrative services	56111	747,413	15%	$54,055
Payroll & Bookkeeping Services	54121	1,465,608	9%	$50,214

Source: Economic Modeling Specialists Inc.

Distribution & Logistics

Bartlesville's accessible and central location, growing workforce, along with the presence of a nearby Wal-Mart distribution center suggest that industries involved in Distribution & Logistics would find the area particularly attractive.

Major Activities and Services:

Distribution of durable & non-durable products.

Operate merchandise warehousing and storage facilities.

Provide consolidation of freight consignments, trade document preparation, packing, crating and otherwise preparing goods for transportation, and logistics consulting services.

Operate refrigerated warehousing and storage facilities.

Rationale:

- Access to US Highway 75
- Location near Tulsa and Tulsa Airport
- Successful existing Wal-Mart Distribution Center
- Growing retail workforce, likely attracted to higher-paying and more stable positions

Table 35
Distribution & Logistics

U.S. Overview

Industry	NAICS Code	2010 National Employment	5-Year Projected Percent Change	National Earnings Per Workers
Freight Packing & Logistics Services	48899	29,932	2%	$41,724
General warehousing and storage	49311	612,628	9%	$42,787
Refrigerated warehousing and storage	49312	55,201	4%	$46,609
General wholesaling	42	6,329,368	3%	$73,158

Source: Economic Modeling Specialists Inc.

Instrumentation/Control Systems

Instrumentation/Control Systems are developing into a manufacturing sector requiring both production and technical expertise. Private industry and government are demanding more accurate electrical/mechanical means for measuring, monitoring and controlling systems and products. Bartlesville's existing energy expertise, industrial sites, and growing workforce are well-suited to meet this industry's demands.

Major Activities and Services:

Manufacturer of measuring, and control instruments.

Manufacturer of a variety of industrial and fluid power valves.

Manufacturer power, distribution, and specialty transformers; switchgear and switchboard apparatus; relays; and industrial controls.

Specialized development, design and utilization of instrumentation and control processes.

Rationale:

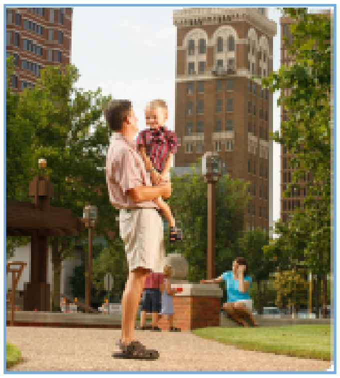
- Existing local industry and occupational specialization
- Unique energy industry network/cluster
- Machine Tool/Machinist Program at Tri-County Technology Center
- Applied Technology program at Rogers State University
- Existing industrial sites
- Growing retail workforce, likely attracted to higher-paying and more stable positions

Table 36
Instrumentation/Control systems
U.S. Overview

Industry	NAICS Code	2010 National Employment	5-Year Projected Percent Change	National Earnings Per Workers
Electronic instrument manufacturing	3345	422,708	-1%	$99,430
Industrial valve manufacturing	332911	24,668	2%	$68,892
Electrical equipment manufacturing	33531	143786	-10%	$74,607
Engineering services	54133	1,048,598	13%	$87,548

Source: Economic Modeling Specialists Inc.

Tourism Development



Bartlesville has a unique set of historic/cultural assets which can be developed into a significant economic contributor. Tourism development also has the ability to offer balance to the local energy-dominated economy.

Tourism Market Trends:

- Aging baby boomers seeking new domestic venues
- Increase in demand for historic/cultural venues
- Interest in authentic experiences
- Fatigue with packaged theme park experiences
- Demand for safe nonurban drive venues
- Increase in international visitors seeking unique American experiences
- Post-recession repositioning to capture new consumers as incomes return

Bartlesville's Unique Position:

- Truly unique "one-in-the world" attractions, such as:
- Woolaroc Ranch, Museum, Native American Heritage Center and Wildlife Preserve
- Phillips Petroleum Company Museum
- Price Tower
- Access to a growing flexible workforce
- Central location, interstate and airport access
- Community leadership and support

FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

Bartlesville is a unique and dynamic community. Through Phillips Petroleum and now ConocoPhillips, the City has benefited from both corporate and individual benefactors. As a result, it's a forward thinking community that has embraced the arts, has a quality health system, has continued to fund economic development efforts sufficiently to provide both product, e.g., industrial parks, and economic development service delivery efforts effectively, and is working to enhance its downtown central business district. As a result of Bartlesville's long history of success and focused efforts, we have offered recommendations that will complement the work of the current BDC in its role to help grow the economy of Bartlesville.

One issue related to organization and mission that we heard and observed during our due diligence in Bartlesville is the perceived redundancy or duplicative services of a number of organizations that are engaged in economic development. The BDC has a well defined mission as the community's business development organization. Care should be taken not to expand this mission solely because the BDC is well funded with professional staff. While community leaders may feel comfortable assigning additional responsibilities to the BDC, the Chamber of Commerce, the BRTA and any other organization involved in economic development should each have well defined mission statements and execute specific business plans to fill economic development gaps without diluting BDC's primary industry focus or duplicating services.

Much has been accomplished over the last five months with the BDC. We have had numerous conversations with the President of the BDC to initiate some much needed recommendations early on during our consultative engagement. Those recommendations are not reflected in this document, such as internal reorganization recommendations that have already occurred.

Recommendations for action are categorized under three areas of opportunity:

1. Organizational
2. Product Marketing[33]
3. Product Improvement[34]

The "Product" is considered Bartlesville.

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[33] Product marketing is defined as marketing/promoting or selling the County or region worldwide for business development opportunities and investment.

[34] Product improvement is defined as the County having the necessary infrastructure, including a favorable business climate that attracts investment to the community. Product improvement is the foundation that allows product marketing to succeed.

"The economies of most big cities are idling. The real entrepreneurial hotbeds are now on the periphery -- where low costs make it possible to thrive in a tough global economy. Thanks to lower housing and labor costs, more favorable regulatory environments, and, in some cases, lower taxes, these smaller cities are proving ideal places for doing business -- especially in a globalized economy in which companies operate under relentless pressure to keep costs low and quality high. In many cases, it is precisely these low costs that allow U.S. companies to successfully compete in industries that often seem all but ready to concede to India and other countries. Rather than sending business overseas, many companies are instead opting to contract with lower-cost domestic suppliers -- a new wrinkle in the outsourcing trend known as "home-shoring." [35]

Bartlesville, through a concerted and unified effort, can continue to achieve what many smaller communities are only wishing to accomplish in its economic development efforts.

There are three common denominators with communities that sustain economic development success:

1. Product – something to market and sell
2. A well funded budget
3. A professional and proactive staff

We have devised our recommendations to keep these three tenants in mind and for the BDC to control its own destiny, rather than rely heavely on other organizations that would serve as a resource to provide deal flow for the City (such as the OK DOC).

At the end of this chapter is a table that gives specifics of an estimated budget, the recommended organization responsible for implementation and timeline.

ORGANIZATIONAL

(Organizational recommendations include staffing, budget, governance and other related items that allow for the effective service delivery of economic development in Bartlesville.)

1. The BDC's budget is approximately $1,000,000 per year is through public funds from a publicly supported (voter) sales tax. It is a sustainable source of funding that fluctuates solely on the volume of retail sales within the community. We commend the leadership of Bartlesville for using this source of funding as a method to finance economic development initiatives in the community.

2. The BDC recently reorganized its economic development function to shift its staff person who was focused on business retention and expansion efforts, to be more generalized as a business development director. We support and validate this change as an opportunity to enhance prospect flow in Bartlesville, especially

[35] Inc. magazine May 2005

when there are certain limitations on what an economic development program can do to facilitate existing business expansion efforts.

3. We heard in our interviews that Bartlesville lacks in retail selection for its citizens (from restaurants to shopping). We were not able to confirm but heard from a number of interviews about resident shopping leakage to Owasso. Though we believe the BDC should focus its efforts on primary job creation, the lack of retail growth has an impact on everything from quality of place characteristics to public funds for local governments. In that regard, we are taking the approach that the **Chamber of Commerce take the lead with retail promotion**, as many Chamber's do nationwide, and have a staff person (part time) whose focus is to develop the demographic case for the expansion of retail, work with others to create a realistic retail strategy and then participate in various trade/marketing shows such as the International Council of Shopping Centers to promote Bartlesville proactively for retail attraction. We believe this marketing initiative should be funded separately and not from local sales tax sources since objections could occur from other business owners that feel public tax dollars create unfair competition.

4. As funding for the BDC may increase and deal flow grows, the **BDC should consider hiring one additional staff person that would serve as a project manager to direct the BDC's external marketing and sales efforts**. This person could also be trained in multi disciplined roles to serve as a business intelligence/research person, which is missing now and is a critical link in staffing a holistic and complete economic development service delivery program.

5. The BDC is responsible for the management and administration of the convention and visitors bureau (CVB). The **CVB should consider having a visitor's center kiosk at Woolaroc and at the Phillips Petroleum Company Museum**, based on the number of visitors annually at each location.

Product Marketing

(Product marketing is defined as marketing/promoting or selling Bartlesville worldwide for business development opportunities and investment.)

1. Bartlesville, because of its energy research through ConocoPhillips and Chevron Phillips, along with the communities of Tulsa and Ponca City, also doing some form of energy research, should **market itself as the Energy Innovation or Energy Research Corridor**, which complements our earlier recommendation of industry targets in the scientific and energy research sectors. By working as a marketing consortium, the region would be able to avail itself of a larger pool of funds to collectively market the area worldwide to prospective businesses, especially to research and development firms within the energy sector. This

branding would not only include electronic and print media, but also highway signage and a unified branding campaign of the region.

2. The BDC should **conduct a multi faceted print and electronic media campaign to the targeted industry sectors** noted previously in the section on Optimal Business Targets. Monthly, followed by quarterly communication to these industry targets from the company names provided by Whittaker Associates, should be a key priority in this upcoming fiscal year.

3. Additionally, **visitations should occur with those companies that have been qualified from Whittaker** as offering the best possibility for relocation or expansion to Bartlesville.

4. The BDC's **web site** (which is currently integrated within the Chamber's portal) is your number one marketing tool and as such, **needs to be designed to offer the resources that your specific audience's need.** In summary, our immediate recommendations to enhance the BDC's web site include:

   - Put globally positioned contact information (especially phone) at the top of each page and on all downloadable material.
   - Write a central home-page paragraph that describes the site's purpose and the mission of your organization.
   - Integrate optimized, branded, thematic maps throughout the site to orient and inform your audience as they read related text.
   - Add data to increase substance to the site, focusing on data desired by site selectors and corporate end-users.
   - Restructure navigation to better serve your audiences, especially for recruitment. Consider orienting navigation by audience type.
   - Use a PDF creator so your visitors can customize documents on the fly.
   - Improve traffic to the site by focusing on search engine optimization in your site redesign.
   - Begin to incorporate social media application into your web strategy.
   - Translate a community overview and local statistical data via a PDF into Japanese, Chinese, Korean, German, Spanish, Hebrew (great growth opportuntiy from Israeli companies) and any other language from countries that have an influx or interest into Bartlesville.

5. The public leadership of Bartlesville should work with its legislative delegations in both the State and Congress to get **US HWY 75 from Tulsa to Bartlesville** (where it is limited access) **designated as an Interstate spur** by the US Department of Transportation. This would position Bartlesville in a more

favorable posture by companies and consultants that are analyzing locations based on Interstate accessibility.

6. In our review of the BDC's existing collateral material for the marketing and promotion of the City, we believe the BDC should work with its marketing agency to **produce new collateral material that will effectively promote** Bartlesville successfully. Good promotional material is a necessity for a community to productively advance itself.

7. The BDC should consider conducting an **annual familiarization tour (FAM) in Bartlesville** with site selection consultants to inform them on the advantages of doing business in Bartlesville.

Product Improvement

(Product improvement is defined as Bartlesville having the necessary infrastructure, including a favorable business climate that attracts investment to the community.) Product improvement is the foundation that allows product marketing to succeed. Items reviewed for consideration include sites and buildings, transportation infrastructure, utility infrastructure, workforce development, leadership and incentives.

1. With the number of engineers and scientists in the community, local officials should explore the possibility of offering a **satellite campus of the University of Oklahoma's Mewbourne School of Petroleum and Geological Engineering.** This would complement the community's efforts to grow its wage and income structure by focusing on a higher educated workforce, which complements our recommended industry targets. This would also serve as a benefit and service for those with undergraduate degrees in petroleum or mining engineering to pursue Master level courses offered by the University. OSU has a Tulsa campus, and Bartlesville's effort to secure a satellite campus from OU similar to Rogers State in Bartlesville would be significant. The addition of a satellite campus will be looked upon more favorably by potential corporate investors engaged in this business sector.

2. The BDC recently acquired 130 acres of property (former golf course) named the Sunset Industrial Park. The property will need infrastructure provided for the tenants and a flexible site plan developed so it can be ready for implementation on an as needed basis. It is our recommendation that the **BDC either partner with a developer or undertake alone the development of a multi use flexible building** as a tool to attract manufacturing or office related companies associated with our target industry recommendations.

3. Mobile entrepreneurs or lone eagles, people who can live and work anywhere based on their jobs and lifestyle, has potential for Bartlesville. This is especially

true for those individuals that may leave the employment of a local employer but choose to stay in Bartlesville High speed internet access and particularly wireless internet, is critical in the attraction and retention of mobile entrepreneurs. The City of Bartlesville installed wireless internet in the downtown business distirict some time ago but as of April of this year when we last visited, it was not working. We understand that it has not been working for sometime. **Wireless should be repaired in the central business district** as a service of the City. This sends a message of business support to mobile entrepreneurs and that the community has embraced technology.

4. A **venture capital fund or Angel network** should be created to assist small business entrepreneurs in new business start ups. This would be especially helpful to those tenants at the incubator housed at Tri County Technical College. A committee should be utilized to analyze and evaluate business plans.

5. Public leadership recognizes that having a redundant and sustainable **water supply** is an issue in Bartlesville. Without a remedy to that problem, it will serve as an impediment to Bartlesville's effort to expand its economic base. We aren't telling the leadership of Bartlesville something they don't already know. Rather, we are validating the issue that it must be resolved sooner rather than later utilizing State and Federal resources to assist.

6. We heard from a number of our interview respondents, including existing employers, that **public transportation** is a necessity in Bartlesville so as to attract people who want to be engaged in the workforce but are limited in participating effectively because they need transportation to and from work. In a subsequent conversation with the City, it is our understanding that discussions regarding public transportation have been ongoing in earnest for the last 18 months, but that changes in city finances has caused this issue to not be top of mind as the City faces other funding challenges. Typically, we have seen public transportation initially funded by Federal funding sources. Many times, that funding source has a sunset provision. We encourage the City to determine that there is a sustainable funding source for the longevity of public transportation should the City move forward so as not to cut services in other areas if Federal sources become depleted.

CONCLUDING THOUGHTS

Bartlesville is a success story. With entrepreneurship, innovation and the quality of its public and private leadership over multiple generations, Bartlesville has been able to position itself as a competitor in a global economy. The challenge is to sustain that position and not become complacent. Bartlesville must look forward and recognize that to succeed it cannot be business as usual. It must be prepared to accept constant and rapid change from the impact of a constantly evolving global economy. Great companies reinvent themselves to stay viable such as IBM and Apple. Likewise, communities must work to create new clusters of opportunity for economic growth to control their own destiny. We challenge Bartlesville to show its competitors that they will do what is necessary to continue to be a global competitor.

The following table provides a detailed list of each recommendation and a checklist of its status. This document will allow the organization responsible for implementation and its governing board a management tool to monitor its execution.

IMPLEMENTATION GUIDELINES FOR RECOMMENDATIONS

Recommendation	Responsible Organization	Schedule	Estimated Cost	Status		
				In Progress	Complete	Incomplete
ORGANIZATIONAL						
1. Chamber of Commerce should take the lead with retail promotion.	Chamber	2012	$30K			
2. BDC should consider hiring one additional staff person that would serve as a project manager to direct the BDC's external marketing and sales efforts.	BDC	2012	$45K			
3. CVB should consider having a visitor's center kiosk at Woolaroc and at the Phillips Petroleum Company Museum.	BDC	2012	NA			
PRODUCT MARKETING						
1. Market itself as the Energy Innovation or Energy Research Corridor	BDC	2011	$50K			
2. Conduct a multi faceted print and electronic media campaign to the targeted industry sectors	BDC	2011-2014	$35K per year			
3. Visitations should occur with those companies that have been qualified from Whittaker	BDC	2011-2014	$15K per year			
4. Web site needs to be designed to offer the resources that your specific audience's need	BDC	2011	$30K			
5. Get US HWY 75 from Tulsa to Bartlesville designated as an Interstate spur.	City, County, Chamber, Congressional support	2011	NA			
6. Produce new collateral material that will effectively promote Bartlesville.	BDC	2011, 2012	$50-60K			
7. Annual familiarization tour (FAM)	BDC	2011-2014	$20K per year			
PRODUCT IMPROVEMENT						
1. Satellite campus of the University of Oklahoma's Mewbourne School of Petroleum and Geological Engineering	Chamber, et al	2012 -	NA			
2. BDC either partner with a developer or undertake alone the development of a multi use flexible building	BDC, et al	2011	NA			
3. Wireless should be repaired in the central business district	City	2011	NA			

Recommendation	Responsible Organization	Schedule	Estimated Cost	Status		
				In Progress	Complete	Incomplete
4. Venture capital fund or Angel network	BDC, Tri County Tech, Chamber	2012 +	$2mm+			
5. Water supply	City	–	–			
6. Public transportation	City	–	–			

APPENDICES

Benchmark Geographic Components

Bartlesville (unless noted otherwise)	
Washington County, OK	
Tulsa Combined Statistical Area (CSA)	
Creek County, OK	Okmulgee County, OK
Osage County, OK	Pawnee County, OK
Rogers County, OK	Tulsa County, OK
Wagoner County, OK	Washington County, OK*
Houston TX Metropolitan Area (MSA)	
Austin County, TX	Brazoria County, TX
Chambers County, TX	Fort Bend County, TX
Galveston County, TX	Harris County, TX
Liberty County, TX	Montgomery County, TX
San Jacinto County, TX	Waller County, TX
Kansas City MO-KS Metropolitan Area (MSA)	
Franklin County, KS	Johnson County, KS
Leavenworth County, KS	Linn County, KS
Miami County, KS	Wyandotte County, KS
Bates County, MO	Caldwell County, MO
Cass County, MO	Clay County, MO
Clinton County, MO	Jackson County, MO
Lafayette County, MO	Platte County, MO
	Ray County, MO

** Without Washington County, the Tulsa CSA becomes the Tulsa Metropolitan Area (MSA)*

Detail of all Occupations
Bartlesville 2010 1Q
High Specialization shaded in green

SOC Code	Description	2010 Jobs	5Y Change	5Y % Change	LQ
11-0000	Management	2,675	118	5%	1.33
11-1000	Top executives	702	-20	-3%	1.50
11-1010	Chief executives	268	11	4%	1.43
11-1020	General & operations managers	430	-30	-7%	1.59
11-2000	Advertising, marketing, promotions, public relations, & sales managers	69	3	5%	0.65
11-2020	Marketing & sales managers	62	4	7%	0.69
11-3000	Operations specialties managers	266	-9	-3%	1.02
11-3010	Administrative services managers	48	-2	-4%	1.23
11-3020	Computer & information systems managers	34	3	10%	0.74
11-3030	Financial managers	91	-2	-2%	0.85
11-3040	Human resources managers	31	0	0%	1.35
11-3050	Industrial production managers	42	-7	-14%	1.94
11-3060	Purchasing managers	12	-1	-8%	1.19
11-9000	Other management	1,638	143	10%	1.39
11-9010	Agricultural managers	801	37	5%	2.61
11-9020	Construction managers	97	5	5%	0.89
11-9030	Education administrators	60	1	2%	0.77
11-9040	Engineering managers	11	0	0%	0.41
11-9050	Food service managers	94	25	36%	1.22
11-9080	Lodging managers	15	1	7%	0.74
11-9110	Medical & health services managers	56	7	14%	1.10
11-9140	Property, real estate, & community association managers	178	29	19%	0.88
11-9150	Social & community service managers	30	1	3%	1.24
11-9190	Managers, all other	282	45	19%	1.07
13-0000	Business & financial operations	1,141	17	2%	0.82
13-1000	Business operations specialists	376	7	2%	0.53
13-1020	Buyers & purchasing agents	68	-3	-4%	0.93
13-1030	Claims adjusters, appraisers, examiners, & investigators	39	-18	-32%	0.74
13-1040	Compliance officers, except agriculture, construction, health & safety, & transportation	12	0	0%	0.31
13-1050	Cost estimators	20	2	11%	0.60
13-1070	Human resources, training, & labor relations specialists	99	9	10%	0.78
13-1110	Management analysts	87	16	23%	0.49
13-1190	Business operation specialists, all other	35	-1	-3%	0.22
13-2000	Financial specialists	765	10	1%	1.10
13-2010	Accountants & auditors	420	-21	-5%	1.67
13-2020	Appraisers & assessors of real estate	38	10	36%	0.53
13-2040	Credit analysts	26	-1	-4%	2.44
13-2050	Financial analysts & advisors	184	5	3%	0.80
13-2070	Loan counselors & officers	73	14	24%	1.23
13-2080	Tax examiners, collectors, preparers, & revenue agents	14	0	0%	0.49
15-0000	Computer & mathematical science	515	31	6%	0.88
15-1000	Computer specialists	500	33	7%	0.89
15-1020	Computer programmers	57	4	8%	0.81
15-1030	Computer software engineers	61	5	9%	0.41

SOC Code	Description	2010 Jobs	5Y Change	5Y % Change	LQ
15-1040	Computer support specialists	188	4	2%	2.17
15-1050	Computer systems analysts	52	6	13%	0.63
15-1060	Database administrators	32	1	3%	1.72
15-1070	Network & computer systems administrators	31	3	11%	0.59
15-1080	Network systems & data communications analysts	54	9	20%	0.93
15-1090	Computer specialists, all other	18	-1	-5%	0.50
15-2000	Mathematical science	15	-1	-6%	0.76
15-2030	Operations research analysts	13	-1	-7%	1.27
17-0000	Architecture & engineering	253	21	9%	0.62
17-1000	Architects, surveyors, & cartographers	27	5	23%	0.64
17-1010	Architects, except naval	14	3	27%	0.44
17-1020	Surveyors, cartographers, & photogrammetrists	14	4	40%	1.19
17-2000	Engineers	137	9	7%	0.56
17-2020	Agricultural engineers	0	0	0%	0.00
17-2050	Civil engineers	16	3	23%	0.33
17-2070	Electrical & electronics engineers	14	1	8%	0.32
17-2110	Industrial engineers, including health & safety	15	0	0%	0.42
17-2150	Mining & geological engineers, including mining safety engineers	13	1	8%	5.48
17-2170	Petroleum engineers	47	1	2%	10.17
17-3000	Drafters, engineering, & mapping technicians	89	8	10%	0.72
17-3010	Drafters	16	3	23%	0.42
17-3020	Engineering technicians, except drafters	57	3	6%	0.78
17-3030	Surveying & mapping technicians	16	2	14%	1.30
19-0000	Life, physical, & social science	158	6	4%	0.57
19-2000	Physical scientists	58	3	5%	1.18
19-2040	Environmental scientists & geoscientists	52	5	11%	2.13
19-3000	Social scientists & related	56	8	17%	0.43
19-3020	Market & survey researchers	22	3	16%	0.42
19-3030	Psychologists	32	4	14%	0.53
19-4000	Life, physical, & social science technicians	34	-4	-11%	0.65
19-4040	Geological & petroleum technicians	25	-3	-11%	10.63
21-0000	Community & social services	408	-11	-3%	1.02
21-1000	Counselors, social workers, & other community & social service specialists	247	-4	-2%	0.76
21-1010	Counselors	114	-6	-5%	0.99
21-1020	Social workers	73	-1	-1%	0.67
21-1090	Miscellaneous community & social service specialists	60	2	3%	0.59
21-2000	Religious workers	162	-6	-4%	2.14
21-2010	Clergy	103	-3	-3%	2.16
21-2020	Directors, religious activities & education	41	-2	-5%	2.15
21-2090	Religious workers, all other	18	-1	-5%	2.01
23-0000	Legal	203	-17	-8%	0.91
23-1000	Lawyers, judges, & related workers	59	12	26%	0.41
23-1010	Lawyers	56	12	27%	0.41
23-2000	Legal support workers	144	-29	-17%	1.81
23-2010	Paralegals & legal assistants	12	1	9%	0.28
23-2090	Miscellaneous legal support workers	132	-31	-19%	3.44
25-0000	Education, training, & library	1,183	53	5%	0.76

SOC Code	Description	2010 Jobs	5Y Change	5Y % Change	LQ
25-1000	Postsecondary teachers	81	3	4%	0.33
25-1090	Postsecondary teachers	81	3	4%	0.33
25-2000	Primary, secondary, & special education teachers	667	30	5%	0.86
25-2010	Preschool & kindergarten teachers	158	4	3%	1.38
25-2020	Elementary & middle school teachers	323	19	6%	0.84
25-2030	Secondary school teachers	127	4	3%	0.64
25-2040	Special education teachers	59	4	7%	0.74
25-3000	Other teachers & instructors	161	11	7%	0.72
25-3010	Adult literacy, remedial education, & GED teachers & instructors	25	2	9%	0.65
25-3020	Self-enrichment education teachers	53	5	10%	0.81
25-3090	Teachers & instructors, all other	84	6	8%	0.69
25-4000	Librarians, curators, & archivists	30	1	3%	0.61
25-4020	Librarians	17	1	6%	0.65
25-4030	Library technicians	12	1	9%	0.62
25-9000	Other education, training, & library	243	6	3%	0.91
25-9040	Teacher assistants	196	4	2%	0.88
25-9090	Education, training, & library workers, all other	35	1	3%	2.02
27-0000	Arts, design, entertainment, sports, & media	495	90	22%	0.65
27-1000	Art & design	160	35	28%	0.73
27-1010	Artists & related workers	57	16	39%	0.61
27-1020	Designers	104	20	24%	0.83
27-2000	Entertainers & performers, sports & related	133	16	14%	0.72
27-2010	Actors, producers, & directors	14	-1	-7%	0.40
27-2020	Athletes, coaches, umpires, & related workers	41	8	24%	0.77
27-2040	Musicians, singers, & related workers	67	6	10%	0.95
27-3000	Media & communication	120	25	26%	0.59
27-3030	Public relations specialists	26	1	4%	0.58
27-3040	Writers & editors	54	14	35%	0.58
27-3090	Miscellaneous media & communications workers	23	5	28%	0.54
27-4000	Media & communication equipment	82	13	19%	0.55
27-4010	Broadcast & sound engineering technicians & radio operators	12	-4	-25%	0.66
27-4020	Photographers	67	18	37%	0.56
29-0000	Healthcare practitioners & technical	1,417	167	13%	1.13
29-1000	Health diagnosing & treating practitioners	810	117	17%	1.00
29-1020	Dentists	20	5	33%	0.75
29-1040	Optometrists	15	-1	-6%	1.86
29-1050	Pharmacists	53	6	13%	1.27
29-1060	Physicians & surgeons	153	18	13%	1.10
29-1110	Registered nurses	368	53	17%	0.89
29-1120	Therapists	153	31	25%	1.36
29-1130	Veterinarians	16	0	0%	1.38
29-2000	Health technologists & technicians	541	51	10%	1.26
29-2010	Clinical laboratory technologists & technicians	40	2	5%	0.79
29-2020	Dental hygienists	26	7	37%	0.91
29-2030	Diagnostic related technologists & technicians	63	8	15%	1.18
29-2040	Emergency medical technicians & paramedics	56	1	2%	1.72
29-2050	Health diagnosing & treating practitioner support technicians	114	12	12%	1.22
29-2060	Licensed practical & licensed vocational nurses	175	19	12%	1.48

SOC Code	Description	2010 Jobs	5Y Change	5Y % Change	LQ
29-2070	Medical records & health information technicians	42	3	8%	1.57
29-2080	Opticians, dispensing	15	-1	-6%	1.34
29-2090	Miscellaneous health technologists & technicians	11	1	10%	0.65
29-9000	Other healthcare practitioners & technical	66	-1	-1%	2.90
29-9010	Occupational health & safety specialists & technicians	40	-5	-11%	3.76
29-9090	Miscellaneous health practitioners & technical workers	26	4	18%	2.15
31-0000	Healthcare support	717	107	18%	1.06
31-1000	Nursing, psychiatric, & home health aides	451	72	19%	1.05
31-1010	Home health aides	451	72	19%	1.05
31-2000	Occupational & physical therapist assistants & aides	40	11	38%	1.67
31-2020	Physical therapist assistants & aides	29	8	38%	1.61
31-9000	Other healthcare support	226	24	12%	1.02
31-9010	Massage therapists	18	2	13%	1.06
31-9090	Miscellaneous healthcare support	208	23	12%	1.01
33-0000	Protective service	379	34	10%	0.75
33-1000	First-line supervisors/managers, protective service workers	21	2	11%	0.54
33-2000	Fire fighting & prevention workers	36	2	6%	0.72
33-2010	Fire fighters	35	2	6%	0.75
33-3000	Law enforcement workers	102	6	6%	0.55
33-3010	Bailiffs, correctional officers, & jailers	23	1	5%	0.34
33-3050	Police officers	73	4	6%	0.74
33-9000	Other protective service workers	220	24	12%	0.95
33-9030	Security guards & gaming surveillance officers	193	24	14%	1.12
33-9090	Miscellaneous protective service workers	20	2	11%	0.44
35-0000	Food preparation & serving related	2,035	189	10%	1.12
35-1000	Supervisors, food preparation & serving workers	203	13	7%	1.28
35-1010	Chefs & head cooks	203	13	7%	1.28
35-2000	Cooks & food preparation workers	646	52	9%	1.38
35-2010	Cooks	531	46	9%	1.61
35-2020	Food preparation workers	115	6	6%	0.83
35-3000	Food & beverage serving workers	960	101	12%	0.97
35-3010	Bartenders	43	2	5%	0.53
35-3020	Fast food & counter workers	473	52	12%	0.93
35-3030	Waiters & waitresses	410	45	12%	1.12
35-3040	Food servers, nonrestaurant	35	3	9%	1.19
35-9000	Other food preparation & serving related workers	225	23	11%	1.08
35-9010	Dining room & cafeteria attendants & bartender helpers	41	3	8%	0.64
35-9020	Dishwashers	127	14	12%	1.56
35-9030	Hosts & hostesses, restaurant, lounge, & coffee shop	56	6	12%	1.03
37-0000	Building & grounds cleaning & maintenance	1,251	212	20%	1.14
37-1000	Supervisors, building & grounds cleaning & maintenance workers	107	24	29%	1.22
37-1010	First-line supervisors/managers of housekeeping & janitorial workers	107	24	29%	1.22
37-2000	Building cleaning & pest control workers	904	113	14%	1.13
37-2010	Building cleaning workers	878	119	16%	1.12
37-2020	Pest control workers	26	-6	-19%	1.74
37-3000	Grounds maintenance workers	240	75	45%	1.12
37-3010	Grounds maintenance workers	240	75	45%	1.12
39-0000	Personal care & service	985	105	12%	0.99

SOC Code	Description	2010 Jobs	5Y Change	5Y % Change	LQ
39-1000	Supervisors, personal care & service workers	38	6	19%	0.72
39-1010	First-line supervisors/managers of gaming workers	18	4	29%	1.15
39-1020	First-line supervisors/managers of personal service workers	20	2	11%	0.54
39-2000	Animal care & service workers	57	8	16%	0.80
39-2010	Animal trainers	18	4	29%	1.10
39-2020	Nonfarm animal caretakers	40	4	11%	0.71
39-3000	Entertainment attendants & related workers	143	47	49%	1.50
39-3010	Gaming services workers	15	4	36%	0.63
39-3090	Miscellaneous entertainment attendants & related workers	106	35	49%	2.01
39-5000	Personal appearance workers	115	4	4%	0.94
39-5010	Barbers & cosmetologists	88	4	5%	0.91
39-5090	Miscellaneous personal appearance workers	27	0	0%	1.05
39-6000	Transportation, tourism, & lodging attendants	35	0	0%	0.85
39-6030	Transportation attendants	16	-4	-20%	0.86
39-9000	Other personal care & service workers	592	73	14%	0.98
39-9010	Child care workers	239	-3	-1%	0.76
39-9020	Personal & home care aides	226	62	38%	1.45
39-9030	Recreation & fitness workers	112	13	13%	1.09
41-0000	Sales & related	3,945	443	13%	1.12
41-1000	Supervisors, sales workers	574	22	4%	1.15
41-1010	First-line supervisors/managers of retail sales workers	574	22	4%	1.15
41-2000	Retail sales workers	2,278	295	15%	1.62
41-2010	Cashiers	848	99	13%	1.54
41-2020	Counter & rental clerks & parts salespersons	124	3	2%	1.24
41-2030	Retail salespersons	1,306	194	17%	1.73
41-3000	Sales representatives, services	255	11	5%	0.64
41-3010	Advertising sales agents	15	2	15%	0.49
41-3020	Insurance sales agents	108	2	2%	0.94
41-3030	Securities, commodities, & financial services sales agents	82	3	4%	0.68
41-3040	Travel agents	11	0	0%	0.64
41-3090	Sales representatives, services, all other	38	3	9%	0.33
41-4000	Sales representatives, wholesale & manufacturing	201	20	11%	0.63
41-4010	Sales representatives, wholesale & manufacturing, technical & scientific products	201	20	11%	0.63
41-9000	Other sales & related workers	638	96	18%	0.70
41-9010	Models, demonstrators, & product promoters	13	-1	-7%	0.53
41-9020	Real estate brokers & sales agents	388	86	28%	0.61
41-9040	Telemarketers	62	32	107%	1.21
41-9090	Miscellaneous sales & related workers	173	-21	-11%	0.93
43-0000	Office & administrative support	3,913	221	6%	1.03
43-1000	Supervisors, office & administrative support workers	225	18	9%	0.94
43-1010	First-line supervisors/managers of office & administrative support workers	225	18	9%	0.94
43-2000	Communications equipment operators	59	18	44%	2.12
43-2010	Switchboard operators, including answering service	58	18	45%	2.53
43-3000	Financial clerks	880	-9	-1%	1.40
43-3010	Bill & account collectors	32	-20	-38%	0.51
43-3020	Billing & posting clerks & machine operators	84	2	2%	1.03
43-3030	Bookkeeping, accounting, & auditing clerks	537	-13	-2%	1.58

SOC Code	Description	2010 Jobs	5Y Change	5Y % Change	LQ
43-3050	Payroll & timekeeping clerks	66	-4	-6%	2.19
43-3060	Procurement clerks	17	-1	-6%	1.41
43-3070	Tellers	141	26	23%	1.46
43-4000	Information & record clerks	793	142	22%	0.91
43-4010	Brokerage clerks	10	-1	-9%	1.02
43-4030	Court, municipal, & license clerks	15	0	0%	0.82
43-4050	Customer service representatives	337	104	45%	0.97
43-4070	File clerks	24	-4	-14%	0.76
43-4080	Hotel, motel, & resort desk clerks	31	10	48%	0.89
43-4110	Interviewers, except eligibility & loan	15	2	15%	0.37
43-4130	Loan interviewers & clerks	36	5	16%	1.08
43-4140	New accounts clerks	12	2	20%	0.92
43-4150	Order clerks	38	1	3%	1.11
43-4160	Human resources assistants, except payroll & timekeeping	21	0	0%	0.85
43-4170	Receptionists & information clerks	160	4	3%	0.90
43-4180	Reservation & transportation ticket agents & travel clerks	44	15	52%	1.76
43-4190	Information & record clerks, all other	18	-1	-5%	0.57
43-5000	Material recording, scheduling, dispatching, & distributing	762	84	12%	1.19
43-5020	Couriers & messengers	18	-1	-5%	0.39
43-5030	Dispatchers	46	0	0%	1.05
43-5040	Meter readers, utilities	42	-6	-13%	6.13
43-5050	Postal service workers	70	8	13%	0.80
43-5060	Production, planning, & expediting clerks	26	-2	-7%	0.63
43-5070	Shipping, receiving, & traffic clerks	77	3	4%	0.72
43-5080	Stock clerks & order fillers	468	89	23%	1.65
43-5110	Weighers, measurers, checkers, & samplers, recordkeeping	13	-9	-41%	1.19
43-6000	Secretaries & administrative assistants	694	-14	-2%	0.97
43-6010	Executive secretaries & administrative assistants	694	-14	-2%	0.97
43-9000	Other office & administrative support workers	500	-19	-4%	0.73
43-9010	Computer operators	20	-2	-9%	1.23
43-9020	Data entry & information processing workers	31	6	24%	0.42
43-9040	Insurance claims & policy processing clerks	20	-3	-13%	0.51
43-9050	Mail clerks & mail machine operators, except postal service	11	-5	-31%	0.50
43-9060	Office clerks, general	382	-5	-1%	0.82
43-9190	Office & administrative support workers, all other	23	-1	-4%	0.52
45-0000	Farming	28	8	40%	0.58
47-0000	Construction & extraction	1,531	24	2%	1.16
47-1000	Supervisors, construction & extraction workers	253	2	1%	1.66
47-1010	First-line supervisors/managers of construction trades & extraction workers	253	2	1%	1.66
47-2000	Construction trades & related workers	789	52	7%	0.79
47-2020	Brickmasons, blockmasons, & stonemasons	25	0	0%	0.92
47-2030	Carpenters	184	1	1%	0.82
47-2040	Carpet, floor, & tile installers & finishers	22	0	0%	0.71
47-2050	Cement masons, concrete finishers, & terrazzo workers	47	22	88%	1.51
47-2060	Construction laborers	166	13	8%	0.81
47-2070	Construction equipment operators	103	5	5%	1.35
47-2080	Drywall installers, ceiling tile installers, & tapers	14	-1	-7%	0.43
47-2110	Electricians	56	-6	-10%	0.53

SOC Code	Description	2010 Jobs	5Y Change	5Y % Change	LQ
47-2140	Painters & paperhangers	62	-4	-6%	0.78
47-2150	Pipelayers, plumbers, pipefitters, & steamfitters	54	0	0%	0.62
47-3000	Helpers, construction trades	35	0	0%	0.63
47-3010	Helpers, construction trades	35	0	0%	0.63
47-4000	Other construction & related workers	64	9	16%	0.89
47-4050	Highway maintenance workers	28	2	8%	1.31
47-5000	Extraction workers	389	-41	-10%	8.28
47-5010	Derrick, rotary drill, & service unit operators, oil, gas, & mining	202	-31	-13%	13.58
47-5020	Earth drillers, except oil & gas	19	-1	-5%	4.67
47-5070	Roustabouts, oil & gas	95	-13	-12%	9.68
47-5080	Helpers, extraction workers	30	-3	-9%	6.15
49-0000	Installation, maintenance, & repair	930	-22	-2%	1.01
49-1000	Supervisors of installation, maintenance, & repair workers	57	-1	-2%	0.86
49-1010	First-line supervisors/managers of mechanics, installers, & repairers	57	-1	-2%	0.86
49-2000	Electrical & electronic equipment mechanics, installers, & repairers	43	-9	-17%	0.42
49-2010	Computer, automated teller, & office machine repairers	12	-6	-33%	0.50
49-2090	Miscellaneous electrical & electronic equipment mechanics, installers, & repairers	23	-1	-4%	0.48
49-3000	Vehicle & mobile equipment mechanics, installers, & repairers	285	-8	-3%	1.04
49-3020	Automotive technicians & repairers	178	-22	-11%	1.16
49-3030	Bus & truck mechanics & diesel engine specialists	35	1	3%	0.84
49-3040	Heavy vehicle & mobile equipment service technicians & mechanics	18	3	20%	0.64
49-3050	Small engine mechanics	20	4	25%	1.30
49-3090	Miscellaneous vehicle & mobile equipment mechanics, installers, & repairers	26	2	8%	1.40
49-9000	Other installation, maintenance, & repair	545	-5	-1%	1.14
49-9010	Control & valve installers & repairers	13	0	0%	1.38
49-9020	Heating, air conditioning, & refrigeration mechanics & installers	26	3	13%	0.52
49-9040	Industrial machinery installation, repair, & maintenance workers	412	2	0%	1.53
49-9050	Line installers & repairers	30	-10	-25%	0.72
49-9090	Miscellaneous installation, maintenance, & repair workers	46	-2	-4%	0.56
51-0000	Production	1,315	8	1%	0.91
51-1000	Supervisors, production workers	127	-10	-7%	1.33
51-2000	Assemblers & fabricators	238	44	23%	0.90
51-2020	Electrical, electronics, & electromechanical assemblers	46	8	21%	1.15
51-2040	Structural metal fabricators & fitters	25	13	108%	1.65
51-2090	Miscellaneous assemblers & fabricators	157	19	14%	0.80
51-3000	Food processing	48	0	0%	0.45
51-3020	Butchers & other meat, poultry, & fish processing workers	27	-4	-13%	0.46
51-4000	Metal workers & plastic workers	176	37	27%	0.61
51-4030	Machine tool cutting setters, operators, & tenders, metal & plastic	20	7	54%	0.34
51-4040	Machinists	34	9	36%	0.60
51-4120	Welding, soldering, & brazing workers	96	13	16%	1.44
51-5000	Printing	52	-42	-45%	1.01
51-5010	Bookbinders & bindery workers	17	-15	-47%	1.84

SOC Code	Description	2010 Jobs	5Y Change	5Y % Change	LQ
51-5020	Printers	35	-27	-44%	0.83
51-6000	Textile, apparel, & furnishings	199	20	11%	1.44
51-6010	Laundry & dry-cleaning workers	87	7	9%	2.11
51-6020	Pressers, textile, garment, & related materials	27	1	4%	2.76
51-6030	Sewing machine operators	34	4	13%	1.24
51-6050	Tailors, dressmakers, & sewers	21	5	31%	0.89
51-6060	Textile machine setters, operators, & tenders	13	1	8%	1.00
51-6090	Miscellaneous textile, apparel, & furnishings workers	15	2	15%	0.79
51-7000	Woodworkers	12	-3	-20%	0.25
51-8000	Plant & system operators	170	-30	-15%	3.32
51-8030	Water & liquid waste treatment plant & system operators	42	-6	-13%	2.38
51-8090	Miscellaneous plant & system operators	120	-23	-16%	6.59
51-9000	Other production	294	-7	-2%	0.74
51-9060	Inspectors, testers, sorters, samplers, & weighers	68	1	1%	1.02
51-9080	Medical, dental, & ophthalmic laboratory technicians	23	-4	-15%	1.47
51-9120	Painting workers	20	2	11%	0.72
51-9130	Photographic process workers & processing machine operators	26	3	13%	2.02
51-9190	Miscellaneous production workers	120	-7	-6%	0.88
53-0000	Transportation & material moving	1,255	-1	0%	0.80
53-1000	Supervisors, transportation & material moving workers	50	-4	-7%	0.80
53-1020	First-line supervisors/managers of helpers, laborers, & material movers, h&	22	-1	-4%	0.78
53-1030	First-line supervisors/managers of transportation & material-moving machine & vehicle operators	27	-3	-10%	0.85
53-2000	Air transportation	12	1	9%	0.48
53-3000	Motor vehicle operators	593	25	4%	0.82
53-3020	Bus drivers	63	3	5%	0.60
53-3030	Driver/sales workers & truck drivers	506	20	4%	0.92
53-3040	Taxi drivers & chauffeurs	20	1	5%	0.36
53-7000	Material moving	585	-26	-4%	0.86
53-7030	Dredge, excavating, & loading machine operators	25	0	0%	1.81
53-7050	Industrial truck & tractor operators	49	-3	-6%	0.56
53-7060	Laborers & material movers, h&	288	-14	-5%	0.55
53-7070	Pumping station operators	190	-15	-7%	12.94
53-7080	Refuse & recyclable material collectors	25	6	32%	1.08
55-0000	Military	226	19	9%	0.70

Source: Economic Modeling Specialists, Inc.