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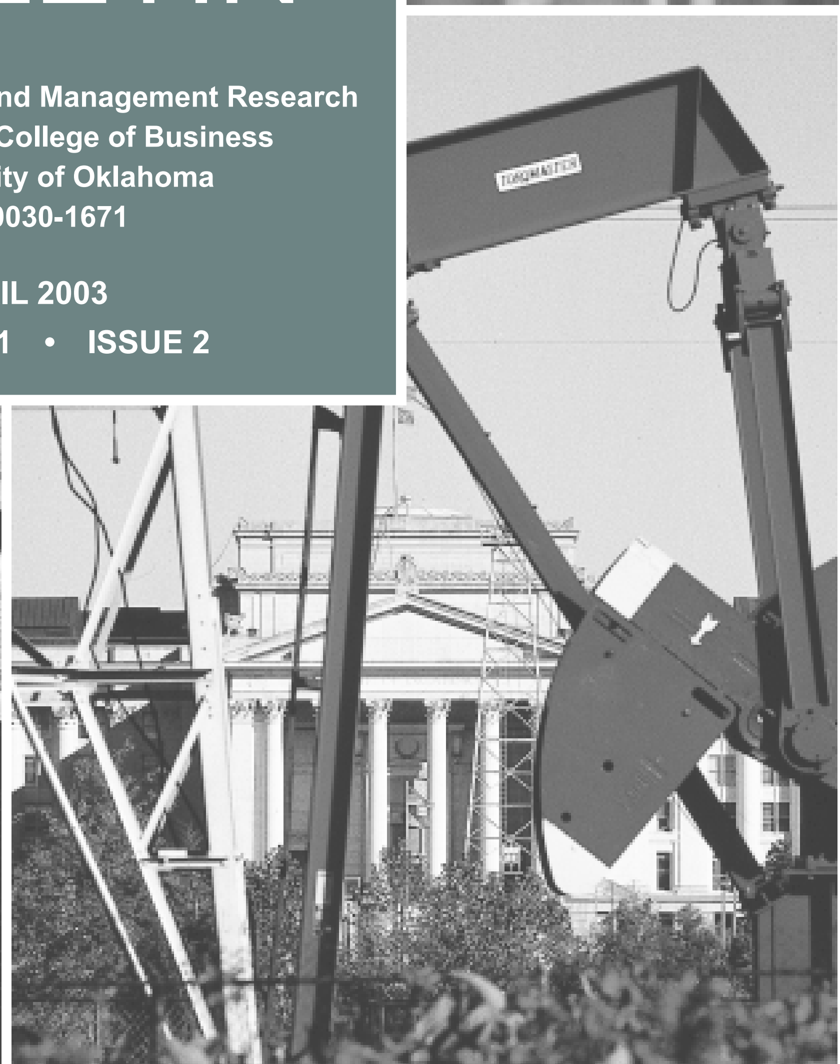

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OVERVIEW

The University of Oklahoma is a doctoral degree-granting research university serving the educational, cultural, economic and health care needs of the state, region and nation. Created by the Oklahoma Territorial Legislature in 1890, the university is composed of campuses in Norman and Oklahoma City as well as the Schusterman Center in Tulsa. The university's main campus and the offices of administration of the University of Oklahoma are located in Norman. The OU Health Sciences Center, which is located in Oklahoma City, is the headquarters for the seven professional colleges and offers programs at the University of Oklahoma - Tulsa. OU-Tulsa is composed of the Schusterman Center, where the majority of OU programs serving Tulsa are located; the OU/OSU Research and Graduate Education Center, a collaborative effort to provide graduate education and research programs to the Tulsa metropolitan area; and several clinics and hospitals. OU enrolls almost 29,000 students, has approximately 1,900 full-time faculty members, and has 19 colleges offering 154 majors at the baccalaureate level, 152 majors at the master's level, 74 majors at the doctoral level, eight majors at the first professional level, and five graduate certificates. The university's annual operating budget is more than $1 billion. The University of Oklahoma is an equal opportunity institution.

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Business Highlights

by Robert C. Dauffenbach

MY APOLOGIES FOR THE LATENESS IN RELEASE of the April edition of the *Oklahoma Business Bulletin*. Several changes in data availabilities became apparent since the previous report. The Federal Reserve Board produces industrial production data vital to the Price College leading indicators. They revised their system to the North American Industrial Classification System (NAICS) in place of the old Standard Industrial Classification (SIC) system. They simply stopped publishing the old SIC variables entirely. In consequence, the Price College Indicators series had to be recalibrated for the new series. That process took considerable time and is now complete.

This system changeover to NAICS has also caused a delay in employment estimates produced by the Oklahoma Employment Securities Commission. Without the employment data, there was little reason to proceed. Thus, the timing all kind of worked out in the end. With this very necessary work behind us, more timely reports can be issued in the future.

Normally, this review first examines the national economic scene. This is in recognition that at least since the 1982 energy bust, Oklahoma has achieved a much more diverse economic base. We depend more and more on the vibrancy of the national economy for our growth prospects. This has always been true to an extent, but it is even more true now. As an indication of diversity, the Tulsa area has been mentioned in press accounts for its high tech industrial base. As seen below, that association for that community may have had consequences in this national economic downturn. But the main reason for discussing the Oklahoma economy first is to focus on recent revisions in employment estimates, which paint an entirely different picture of the status of the state's economy than was apparent prior to the revisions.

Oklahoma Scene

"Shock and Awe" is taking on new meaning in Oklahoma. *Shock* in terms of reports from the Oklahoma Employment Securities Commission that Oklahoma was not, as they initially and prominently reported, one of the most vibrant employment-growth states in the nation. *Awe* in terms of the magnitude of their employment revisions. Throughout 2002, the OESC was reporting that nonfarm employment, the so-called wage and salary employment base, was up by five to seven thousand over the previous year. Tulsa was reported to be having some difficulty. Its employment was said to be about flat. The Oklahoma City region was growing at a fairly good clip, especially for the times and in comparison to national numbers.

Then came the revisions. Every year the OESC revises its numbers in a process they call re-benchmarking. It is difficult to identify the exact nature of that process. I have not been able to find any on-line references to the revision process. Extensive revisions were made in past years, particularly for the Tulsa area, a signal that the nature of the process probably needs investigation.

To say the revisions this year were extensive is to say the least. Table I shows some summary comparisons. December 2002 is the latest month for which both old series and revised series data are available. A two directional view of the employment revisions is seen in that Table.

Table I

Comparison of OESC Nonagricultural Employment Estimates
State of Oklahoma, Oklahoma City, and Tulsa Metro Areas*

	Old Series			Revised Series			Revised - Old Series		
	OK	OKC	TUL	OK	OKC	TUL	OK	OKC	TUL
Dec-01	1527.5	547.4	410.6	1511.4	550.5	407.6	-16.1	3.1	-3.0
Dec-02	1532.6	553.5	411.0	1489.6	549.7	392.2	-43.0	-3.8	-18.8
Change	5.1	6.1	0.4	-21.8	-0.8	-15.4	**’02 Error Rate**		
% Change	0.3%	1.1%	0.1%	-1.4%	-0.1%	-3.8%	-2.9%	-0.7%	-4.8%

*Employment estimates in thousands

The vertical view of the table compares job changes over time for a region and series. For example, under the old series, Oklahoma jobs grew by 5,100, December to December. The horizontal view compares results for a given time for region and series. For the state as a whole, for example, jobs are down 43,000 in a comparison of the old versus revised series for December 2002. Pre-revisions, Oklahoma was said to have 1,532,600 employees on nonagricultural payrolls at the close of the year. With the new estimates, the number of payroll jobs in December was 1,489,600. This is an error-rate of 2.9 percent, assuming that the new estimates are close to the true employment base.

“Oklahoma was seen as performing substantially better than was, in fact, the case. Economic circumstances facing the state are, in consequence, much more desperate than previously thought.”

The error rate is even larger for the five-county Tulsa metropolitan area. The Tulsa area was originally estimated to have 411.0 thousand jobs in December 2002. That estimate has dwindled to 392.2, a difference of 18.8 thousand. This is an error rate of 4.8 percent. The nature of the revisions doesn’t stop here. Whereas the previous OESC reports showed the state up five to seven thousand jobs, the revised estimates show a decline of almost 22 thousand, December 2002 in comparison to December 2001. The Tulsa metro area represented the bulk of this decline, falling by 15,400. The Oklahoma City metro area, however, was down only about 800 jobs in the new estimates from December 2001. In results released just last week, as of March 2003, the OKC area grew by nearly 4,000 jobs in year-over-year results.

Nonagricultural employment statistics are one of our most important and timely gauges of economic performance for the regional economy. It is one of the primary means by which we can gain a recent look at how well we are doing throughout the course of the year. Many business decisions take into account employment growth as one of, albeit, many factors. These statistics also provide the data backdrop to forecasts of the future. Difficulties abound in projecting future economic conditions under any condition. Erroneous data dramatically add to these difficulties.

Bad economic data is much like getting bad gas for one’s car. Data drives public policy decision-making. This process simply doesn’t run well on bad data. Unfortunately, this statistical series, as implemented in Oklahoma, was apparently yielding erroneous information. Oklahoma was seen as performing substantially better than was, in fact, the case. Economic circumstances facing the state are, in consequence, much more desperate than previously thought. These rather more dire circumstances for the Oklahoma economy parallel continuing difficulties at the national level.

National Economy

To say that the US economy is experiencing a jobless economic recovery is to express too optimistic a view. One-half million jobs have been lost since last October. The unemployment rate for April rose to 6.0 percent as nonfarm employment fell by 48,000. Manufacturing employment remains exceptionally weak. Approximately 2.1 million jobs have been lost nationally, using the nonfarm employment base, since the beginning of the recession in March, 2001. Almost unfathomably, manufacturing employment has declined by 1.85 million during that same time period. Job losses in manufacturing, then, represent seven out of eight job losses.

"Manufacturing in the US suffers from the strong dollar, which has been getting noticeably weaker lately, particularly in relation to the euro, where it has declined by 25 percent in the past year."

Because productivity is growing, manufacturing output has not fallen proportionally to the decline in employment. At seasonally adjusted annual rates, manufacturing productivity grew by 2.1 percent in the first quarter of 2003. In durable goods production, the growth rate was an even higher 2.4 percent. Manufacturing nationally also suffers from jobs migrating overseas, principally to China, the new giant kid on the block.

Manufacturing in the US suffers from the strong dollar, which has been getting noticeably weaker lately, particularly in relation to the euro, where it has declined by 25 percent in the past year. That is important because it makes US goods effectively 25 percent cheaper than they were to Europeans prior to the decline. That should help boost manufacturing sales and production. The downside is that Europe is teetering on recession, and this slide in value of the euro may be the blow that tips them into recession. In recession, they can ill-afford to purchase US goods.

The currency in need of upward revision is the Chinese yuan. This currency is presently pegged to the dollar at fixed rates. China is now our largest trade-deficit nation, and is likely to remain so. Many Southeast Asia countries are fearful of the declining dollar and stand ready to competitively devalue their currencies so as not to lose market share to China and other countries. Thus, while the US dollar falls in value relative to the euro, on a trade-weighted basis, it has hardly moved at all.

The dollar is also weak because we import more than we export. The deficit on goods and services expanded to $120.2 billion in the fourth quarter of 2002, up from $110.3 billion the third quarter. The annual deficit is rapidly approaching the 5.0 percent, a level considered to be dangerous in many quarters. For many countries, such large-scale deficits call for drastic action in the form of currency adjustments, i.e., devaluation. For the US, which still can claim world status for its currency, it is not clear that the 5.0 is so critical. It is clear, however, that these continuing deficits are beginning to take a toll on the value of the dollar, and thus its status as a world currency.

In other news on the negative side, real GDP advanced by only 1.6 percent in the preliminary estimates for the first quarter. This is far below the rate of advance necessary to generate job gains. The industrial production index fell by 0.5 percent in both March and April. Utilization of manufacturing capacity fell to 74.4 percent, about seven points below the historical average. Also on the manufacturing front, the Institute for Supply Management reported that the closely followed Purchasing Management Index fell to 45.4 percent in April. Values below 50 signify that manufacturing is contracting.

All of the news on the national economy is not negative, by any stretch. Inflation remains distinctly in check. Consumer prices rose by only 2.2 percent since April 2002 and recent indications are that producer prices are falling. There is more and more talk of deflation, but the likelihood of a general onslaught of falling prices is low, indeed. Employment costs are also in check, rising by 1.3 percent from December 2002 to March 2003. Benefit costs, representing about 30 percent of employment, are posing a problem. For the year ending in March, these costs are up 6.1 percent. Health insurance costs continue to rise at an unsustainable pace.

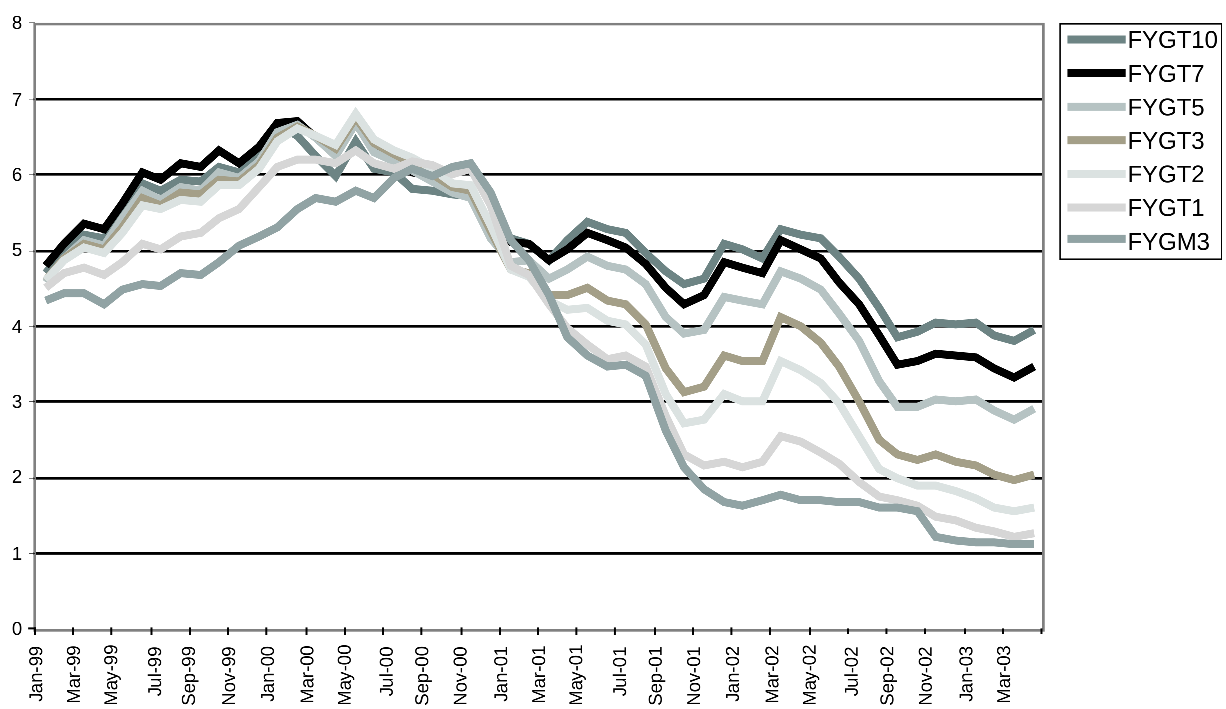
While manufacturing employment continues to weaken, there are signs that the pace of production is soon to increase. New orders for durable manufactured goods are up 1.2 percent year to date in March. Transportation equipment was up 2.4 percent. Computers and electronics increased by 4.0 percent. New orders for all manufactured goods in March reached the highest level since May 2001. Year to date, they are up 3.6 percent.

Construction continues to show strong gains. March activity was at a $868.5 billion annual rate, 1.6 percent above the previous year. Building permits were up 2.8 percent from year ago levels in April. Housing starts were 2.7 percent higher at a 1.63 million units annual rate. New residential sales were up 10.6 percent above March 2002 levels. The housing market remains strong, indeed.

The Fed continues to keep interest rates low and there is no indication that their policy of extremely low interest rates will be changed any time soon. The graphic in Figure A shows just how low rates have fallen. It depicts the yield on various maturities of federal government bonds. Note that in

Figure A

Interest Rate Yields on US Government Bonds Maturing in Three-Months to 10 Years



September 2000, the yields on all of the various maturities was near the 6.0 percent level. When the yields are equal the yield-curve is said to be flat. It is a sign that the Fed is exerting considerable pressure on financial markets, withdrawing liquidity in an effort to restrain expansion of credit. This is in sharp contrast to present relative maturities wherein a fairly substantial gap of about 350 basis points (3.5 percentage points) differentiates the three-month bill rate from the 10 year bond rate. This is an indication of considerable liquidity on the market.

Keeping interest rates low has stimulated refinancing of home mortgages. This has, in turn, placed considerable dollars in the hands of the consumer. Keeping the consumer in the game has been central to public policy. By all accounts, this tactic has succeeded. Whether there is much more potential new spending from this source is questionable. Eventually, there needs to be a turn around in business investment spending. The drop-off in such spending has been the root-cause of this recession, which we have yet to quite shake. Until business investment spending improves, it is likely that many remnants of this recession will remain with us.

Price College Indicators

As readers of this quarterly report are aware, the Price College Indicators, developed at the University of Oklahoma Center for Economic and Management Research, are designed to provide leading indicators of economic activity for the nation, the state, and the two major metropolitan areas of Oklahoma. The indicators have been scaled so that a value of 50 signifies continuation of present trends while values greater or lower than 50 are associated with rising or falling trend rates of growth. The indicators also serve as instruments for producing forecasts. They have successfully foreshadowed every major national recession in the last 40 years. Many of the variables discussed above are examples of the types of variables that are included in the Price College Indicators.

Table II shows the PCI for national employment, the core rate of inflation, Oklahoma employment, and the two major Oklahoma Metropolitan Statistical Areas (MSAs) for the period 2000:1 – 2003:03. Examination of this table shows that the recent upswings in the indicator for the national economy has been somewhat negated.

The PCI for the national economy now stands at 43, a reading distinctly below the 50 neutral point. Unfortunately, the PCI for Oklahoma turned away from the midpoint and is now showing a fair amount of weakness. The Oklahoma City and Tulsa Metropolitan Statistical Areas (MSAs) have now surpassed the midpoint. It is somewhat of an anomaly that the Tulsa indicator is as strong as it is, owing to the considerable weakness that region of the state has experienced. Perhaps the worst is over for the Tulsa economy.

"Expectations for continuing employment growth in Oklahoma are encouraging, especially in relation to apparent problems nationally."

The recalibration of the Price College Indicators that was occasioned by the NAICS changeover will continue. Several new variables have been constructed. The goal is to process all of the available monthly variables in order to compile the most effective PCI series possible. This research will be conducted in the summer months.

Forecasts

The PCIs provide a mechanism for forecasts of the underlying variables. Table III provides some historical data and shows the forecasts for 2003 and 2004. The values are for the ending month, December, of each year.

As noted in Table II, employment nationally is forecast to end the year only slightly down from December 2002 level. Essentially, at the national level, the forecasting model is predicting a very weak growth year in nonfarm payroll employment. A 1.3 percent growth rate is anticipated in 2003.

Table II

Price College Indicators

Year:Month	Natl. Emp.	Inflation	OK Emp.	OKC Emp.	Tul Emp.
2000:01	59	57	54	54	53
2000:02	56	57	55	56	56
2000:03	55	59	58	54	53
2000:04	51	60	58	53	53
2000:05	52	60	57	53	53
2000:06	51	58	54	60	58
2000:07	50	57	51	56	55
2000:08	45	56	49	53	52
2000:09	44	54	46	49	50
2000:10	44	52	42	51	53
2000:11	39	50	39	53	56
2000:12	33	47	30	53	56
2001:01	28	47	22	46	54
2001:02	26	46	18	39	47
2001:03	25	44	17	32	42
2001:04	27	40	16	32	38
2001:05	29	40	18	27	32
2001:06	29	38	19	17	22
2001:07	31	36	20	15	20
2001:08	32	34	20	14	21
2001:09	31	32	19	13	21
2001:10	29	30	19	10	20
2001:11	30	26	19	3	14
2001:12	34	25	27	0	11
2002:01	38	24	32	3	7
2002:02	42	24	36	8	14
2002:03	44	24	37	17	25
2002:04	44	26	39	20	33
2002:05	43	28	41	25	41
2002:06	47	31	43	31	46
2002:07	50	31	43	38	52
2002:08	51	33	44	43	53
2002:09	54	35	46	49	57
2002:10	54	37	47	50	54
2002:11	54	41	48	52	58
2002:12	50	42	45	51	58
2003:01	48	43	44	52	64
2003:02	46	45	42	54	64
2003:03	43	49	40	52	60

Table III

PCI Summary of Forecasts*

	Actual	Forecast		Growth Rate	
	Dec.2002	Dec.2003	Dec.2004	2002/2001	2003/2002
Natl. Emp.	130,670	131,084	132,809	0.3%	1.3%
Inflation	192	196	201	2.0%	2.8%
OK Emp.	1,476	1,479	1,498	0.2%	1.3%
OKC Emp.	543	550	558	1.2%	1.5%
Tul Emp.	389	388	392	-0.3%	1.2%

*Employment in thousands

Inflation, at the core level, which excludes energy and food, is expected to be mild in 2003, rising only 2.0 percent. Inflation is expected to rise at a somewhat higher rate in 2004, 2.8 percent. Expectations for continuing employment growth in Oklahoma are encouraging, especially in relation to apparent problems nationally. Oklahoma employment is expected to rise by only 3,000 in 2003 with much of this growth coming from the Oklahoma City area. Growth in jobs in 2004 should accelerate to a 19,000 gain, or 1.3 percent. The forecast for growth in Oklahoma City employment has improved to 1.2 percent 2003 and a 1.5 percent rate for 2004 is anticipated. Tulsa continues to have some growth problems, but is expected to be growing at a 1.2 percent rate in 2004.

There still remains considerable risk to these forecasts for improvement in both the national and this state's economy. On most economic fronts, save employment, the news has not been all that bad. There are definite signs that the seeds of recovery have been well planted. The US economy has frequently surprised economists with its resiliency. Perhaps that will be the case once again.

Robert C. Dauffenbach is Director of the Center for Economic and Management Research and Associate Dean for Research and Graduate Programs.

Economic Impact of the Arts in Norman, Oklahoma

by David A. Penn

Impact of The Arts in Norman

The Arts in Norman consist of a variety of university, nonprofit, city government, and private sector employers and individual artists. Funded by a grant from the Norman Arts and Humanities Council, this study summarizes the impact of the Arts in Norman in 2001. The first section presents an overview of individual artists in Norman. Using results from a telephone survey, characteristics such as art form, number of shows, revenue, and percent of shows in Norman are discussed. The next section summarizes the economic impact of Arts-related employment in Norman. Using results from a survey of Arts employers and proprietary employment data, impacts on local employment, labor income, and output are presented. Appendix A presents details of the interviews of visitors to Norman festivals and theatres. A discussion of response rates for the survey of employers and the survey of individual artists is presented in Appendix B. Questionnaires used for the interviews are contained in Appendix C.

Characteristics of Norman Artists

Using listings obtained from the Norman Arts and Humanities Council, the Center for Economic and Management Research (CEMR) interviewed 67 artists who reside in Norman. As shown in Table 1, Norman artists engage in a variety of art forms. Painting is most prevalent, followed by sculpture, photography, graphic arts, music, and ceramics.

Table 1

Art Forms of Norman Artists

Art Form	Percent of Artists
Painting	53.7
Sculpture	32.8
Photography	28.4
Graphic Arts	26.9
Music	14.9
Ceramics, pottery, clay	14.9
Drawing	9.0
Writing	6.0
Drama	4.5
Dance	3.0
Other	19.4

Employment and Arts-Related Revenue

About half (50.7%) of Norman artists are full-time artists, the rest part-time. About one in five (20.9%) of Norman artists employ at least one other person in their work. Of these artists with employees, most (71%) employ no more than three persons. Earnings from the sale of art or performances ranged from $0 to more than $35,000 during the past twelve months. Of those with earnings, the median artist earned between $5,000 to $15,000 solely from the sale of art or from performances (Table 2).

Table 2

Arts-Related Revenue for Norman Artists

Arts-Related Revenue During the Past Twelve Months	Percent of Artists
No Revenue	19.4
Less than $5,000 but more than 0	43.3
More than $5,000 but less than $15,000	17.9
More than $15,000 but less than $25,000	4.5
More than $25,000 but less than $35,000	0.0
More than $35,000	7.5
Don't Know	1.5
Refused	6.0

Interestingly, for the average artist about 40 percent of revenue generated by the sales of art or from performances came from events and shows held in Norman. Thus, 60 percent of revenue for the average artist comes from shows NOT held in Norman, suggesting that Norman artists are successfully exporting their work to markets outside the Norman area.

Number of Events or Shows

Activity varies greatly, with about half the artists giving fewer than three shows per year, while 33 percent offer at least six shows per annum (Table 3).

Many shows offered by Norman artists were held out-of-town. Among artists with shows, the median artist held just one-out-of-four shows in Norman (Table 4). This suggests that Norman artists are marketing their work not just to the Norman market, but other markets in Oklahoma and the U.S. A large percentage of shows held not in Norman is a very strong indicator of the export sales potential of Norman artists.

Table 3

Number of Events or Shows by Individual Norman Artists

Number of Events or Shows	Percent of Artists
Zero	19.4
1 - 2	29.9
3 - 5	16.4
6 - 10	10.4
11 - 25	13.4
26 or more	10.4

Economic Impact of the Arts in Norman[1]

Table 4

Percent of Shows in Norman

Percent of Shows Held in Norman	Percent of Artists
None	22.2
1 - 10	25.9
11 - 25	13.0
26 - 60	16.7
61 - 99	5.6
100	16.7

The Arts are a notable source of jobs and income for the Norman economy. As detailed below, the Arts in Norman support 858 jobs, $19.1 million in labor income, and $47 million in industrial output for the Norman economy in 2000. In addition, the Arts in Norman produced a great deal of activity in 2000:

- 558 performances in drama, music, dance, and music theatre,
- 268,000 visitors to festivals,

[1]CEMR is grateful to a number of persons for their cooperation: Linda Linn (Medieval Fair), Terrye Hudson and Gretta Saunders (OU College of Fine Arts), Lindy Waters (Powwow), Gwen Wilburn (Gourd Dance), Gary Kramer (Sooner Theatre), Linda Anderson (OU Budget Office), Nancy McClellan (Midsummer Night's Fair) and Christina Newendorp (Norman Arts and Humanities Council).

- 254,000 visitors to museums,
- 53,000 visitors to theatrical performances (music, dance, theatre, drama),
- 8,200 students at outreach classes and 1,000 college students in the fine arts,
- 24,000 school children at outreach programs from 598 schools,
- 600 outreach programs and lectures, and
- 2,600 volunteers working 47,000 volunteered hours.

This section of the study summarizes the economic contributions of the Arts in Norman to the local economy. These economic contributions are calculated by applying a series of IMPLAN input-output multipliers to estimates of direct local spending for payroll, goods, and services. Local spending is initially generated both from payrolls in arts-related employers and from spending by out-of-town visitors to Norman festivals and theatres.

Results are specified in terms of annual output, employment and labor income. The analysis relies heavily on results of a survey of arts-related employers conducted in December 2001 and also on field interviews at arts festivals and theatres (see Appendix A). Survey responses were supplemented with other sources such as data obtained from The University of Oklahoma Budget for fiscal year 2001 and employment data obtained from data files provided by the Oklahoma Employment Security Commission (ES-202 files). IMPLAN multipliers were constructed for Cleveland County, Oklahoma.

Direct Effects

According to the survey and secondary data sources, Arts organizations and businesses in Norman employ 567 full-time and part-time workers. Approximately 58 percent are employed by The University of Oklahoma.

The Arts industry is labor intensive. The annual payroll of their combined work forces is $12.2 million, averaging $21,581 per employee. This average annual wage is slightly lower than the average annual wage for Cleveland County of $22,686. With a total payroll of $10.1 million, arts-related employment at The University of Oklahoma accounts for 82.6 percent of the total payroll for Arts employers.

Total operating outlays are used in this analysis as the measure of economic output for the Norman Arts. The 28 employers in the Norman Arts had total operating outlays of approximately $26.9 million during fiscal year 2001.

The primary sources of revenue for funding the operations of Arts in Norman employers include funding by The University of Oklahoma and the State of Oklahoma, contributions and grants by foundations, individuals, and corporations, grants from governments including the federal government and city government, admission fees, and investment income. Funding by the university and funds provided by state government constitute more than half of total revenues (Figure 1).

Indirect and Induced Effects

The overall economic contributions of the Norman Arts end beyond the direct effects described above. The added contributions arise due to the indirect and induced effects. The *indirect effect* refers to the secondary impacts on local businesses that supply goods and services to the Arts employers, while the *induced effect* refers to the secondary impacts related to consumer spending.

Local spending by Arts employers for services, supplies, and materials initiates the *indirect effect.* Major items purchased locally by the Arts employers include electricity, natural gas, water and wastewater, office supplies, and printing services. Area businesses that sell goods and services to Arts employers hire workers and purchase needed materials and supplies, with a portion of the purchases occurring locally. Businesses that sell materials and supplies to Arts employers also hire workers and purchase needed inputs. The ripple effect continues, with the impact of each successive round diminishing because of leakages from the spending stream in each round. IMPLAN estimates of the total indirect effects in the Norman area are:

Norman Area Indirect Impacts

- $13.7 million per year in industrial output,
- $4.5 million per year in labor income, and
- 169 jobs.

Local spending by households for goods and services and spending by out-of-town visitors initiates the *induced effect.* Payroll expenses by Arts employers (direct effect) and by employers that supply inputs to Arts employers (indirect effect) are spent by households for items such as housing, electricity, natural gas, water and waste water, transportation, food, clothing, telephone, entertainment, and taxes. In addition, out-of-town visitors spend for food and drink, merchandise, gasoline, and lodging. Spending for these goods and services creates revenue for businesses such as retailers, restaurants, grocery stores, gasoline stations, and movie theaters. These businesses support their own payrolls, resulting in household income and household expenditures.

Again, each successive round of spending diminishes in size due to leakages from the local economy. Leakage refers to goods and services that are imported into the area. Leakages occur at each round of the payroll-household spending cycle, causing the impact of each succeeding cycle to gradually diminish. Estimated by the IMPLAN model, induced effects attributable to the Arts in Norman are:

Norman Area Induced Impacts

- $6.5 million per year in industrial output,
- $2.3 million per year in labor income,
- 124 jobs.

Total Economic Contribution

The total economic contribution for the Norman Area is the sum of the direct, indirect, and induced effects. Total impacts of the Arts in Norman are:

- $47.1 million per year in industrial output,
- $19.1 million per year in labor income, and
- 858 jobs.

Figure 1

Sources of Operating Revenue for Norman Arts Organizations

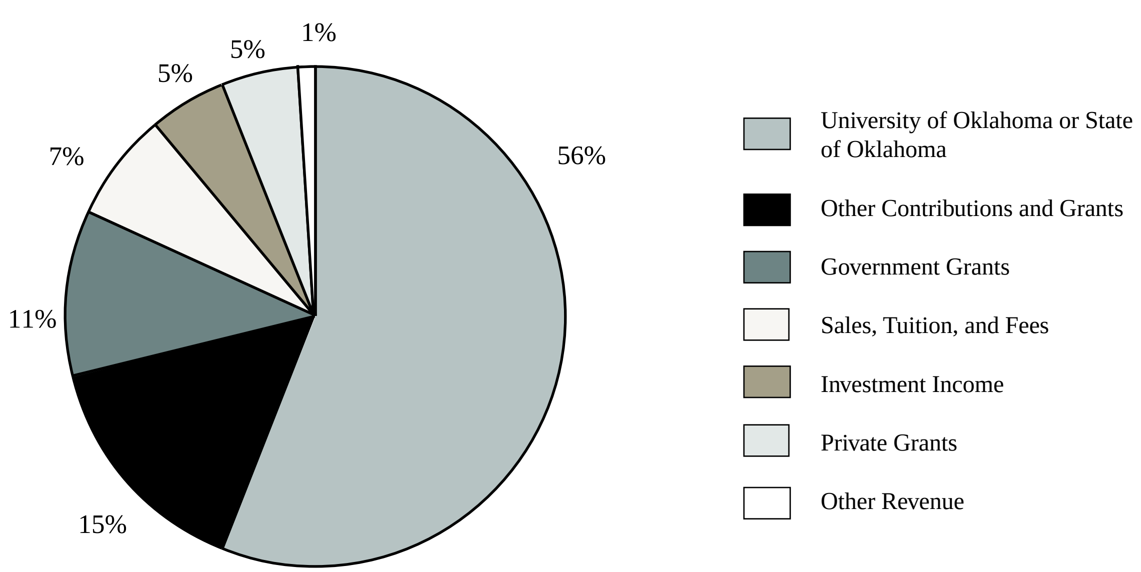


Table 5

Impact of the Arts by Industrial Sector

Sector	Industrial Output (millions)	Labor Income (millions)	Full- and Part-time Jobs
Goods producing sectors	$ 1.82	$ 0.54	18
Retail and wholesale trade	10.36	3.66	166
Transportation, communications, and public utilities	2.42	0.53	8
Finance, insurance, and real estate	3.40	0.33	31
Services	29.02	14.02	635
Total Impact	$47.02	$19.07	858

Table 6

Output Multipliers for Spending by Arts Organizations

	Direct	Indirect	Induced	Total
Employment	13.83	2.70	2.51	19.04
Labor income (thousand)	$328.33	$60.79	$47.24	$436.36
Output (thousand)	$1,000.00	$180.23	$145.20	$1,325.42

*Impact per million dollars of Arts Organization annual output.

Table 7

Output Multipliers for Spending by Out-of-Town Visitors to Festivals and Theatres

	Direct	Indirect	Induced	Total
Employment	29.04	2.80	2.91	34.75
Labor income (thousand)	$395.58	$60.03	$55.19	$510.79
Output (thousand)	$1,000.00	$194.20	$169.62	$1,363.82

*Impact per million dollars of spending.

The impact of the Arts in Norman is felt across all sectors of the area economy. One manner in which this impact manifests itself is in the number of jobs, labor income, and industrial output it supports. A breakdown of impacts across major industrial sectors is presented in the following table. As shown, more than half of the impact occurs in the Services sector including education services, theatrical performances, museums, and other services. The next largest impact occurs in the retail and wholesale trade sector.

Economic Multipliers for the Norman Area

The economic impacts of changes in future expenditures by the Norman Arts sector can be estimated with impact multipliers. Table 6 shows output multipliers developed specifically for the mix of employers involved in the Norman Arts. For example, a $1 million increase in expenditures by Norman Arts organizations would cause a total impact of 19 jobs, $436 thousand in new labor income, and $1.32 million in new industrial output in the Norman Area.

Table 7 shows output multipliers for additional spending on the Arts in Norman by out-of-town visitors. An increase of $1 million in spending by out-of-town visitors would create 35 jobs, $511 thousand in labor income, and $1.36 million in industrial output.

Impact of the Arts on Tax Revenue

Several types of state tax revenues are affected by employment in the Arts and by spending by out-of-town visitors. Such revenues include individual and corporate income tax, franchise taxes, sales tax, and motor vehicle license fees. Revenues are generated both directly and as a result of the indirect and induced activity supported by the Arts in Norman. Estimates were determined for individual income tax and sales tax for the state government, and sales tax for the City of Norman.

Most of the tax revenue impact results are in conjunction with payroll at Arts employers. As described above, the Arts in Norman directly and indirectly supports $19.1 million in annual wages and salaries. Estimated annual state tax revenues generated by this level of total personal income include $572,000 in individual income tax and $312,000 in sales tax. These tax revenue estimates assume an average individual income tax rate of 3.0 percent of total personal income and a sales tax rate of 4.5 percent. The sales tax rate is applied to the share of total personal income assumed to represent taxable sales—45.0 percent in this case. Using a sales tax rate of 4%, the impact from payrolls on sales taxes for the City of Norman is $277,000.

In addition to impacts from payrolls, sales taxes are also collected for admission revenue, sales of publications, on-site spending at festivals and theatres, and off-site spending by out-of-town visitors to festivals and theatres. Estimated State sales tax collections owing to these activities are $204,000, while collections for the City of Norman are an estimated $181,000.

In all, Arts activities in Norman generate approximately $1.1 million for the State Treasury in personal income tax and sales tax and $458,000 for the City of Norman in sales tax.

David A. Penn is Director of the Business and Economic Research Center at Middle Tennessee State University, Murfreesboro, Tennesee.

Appendix A:

Characteristics of Visitors to Arts Events in Norman

More than 500 patron interviews were conducted at seven arts events in Norman in 2001. Events were chosen along four criteria: 1) number of patrons at the event, 2) high likelihood that the event includes large numbers of out-of-town patrons, and 3) ease of arranging access for CEMR interviewers. CEMR did not interview at Jazz at June, since sponsors of the event had arranged for their own patron interviews.

On-site interviews occurred at the following events and productions:

Festivals

- Medieval Fair (April 6, April 7 and April 8), 296 interviews,
- Midsummer Night's Fair (July 20 and July 21), 186 interviews,
- Powwow at the Cleveland County fairgrounds (October 13), 20 interviews, and
- Gourd Dance at The University of Oklahoma (October 27), 27 interviews.

Theatrical Productions

- Nat King Cole Retrospective at the Sooner Theatre (October 19), 37 interviews,
- The Real Thing (play) at the Weitzenhoffer Theatre on the OU campus (November 10), 32 interviews,
- Riders in the Sky at Sooner Theatre (December 4), 36 interviews.

The purpose of the interviews consisted of characterizing the spending patterns of visitors to arts events located in Norman. The more visitors from out-of-town, the larger the net impact on the Norman economy.

Place of Residence

According to the field interviews, a large proportion of patrons are from out-of-town: 43.3% of festival patrons and 41.9% of theatre patrons do not live in Norman. Most out-of-towners live in nearby locations such as Oklahoma City, Moore, Edmond, and Midwest City. Interestingly, 21% of patrons traveled from locations in Oklahoma outside the Oklahoma City Metropolitan Area. Further, 9.7% of patrons at festivals and 17.8% of theatre patrons traveled from out-of-state. Interestingly, attending the arts event was the main purpose of their visit to Norman for 83.7% of festival patrons and 80% of theatre patrons.

Spending by Arts Patrons

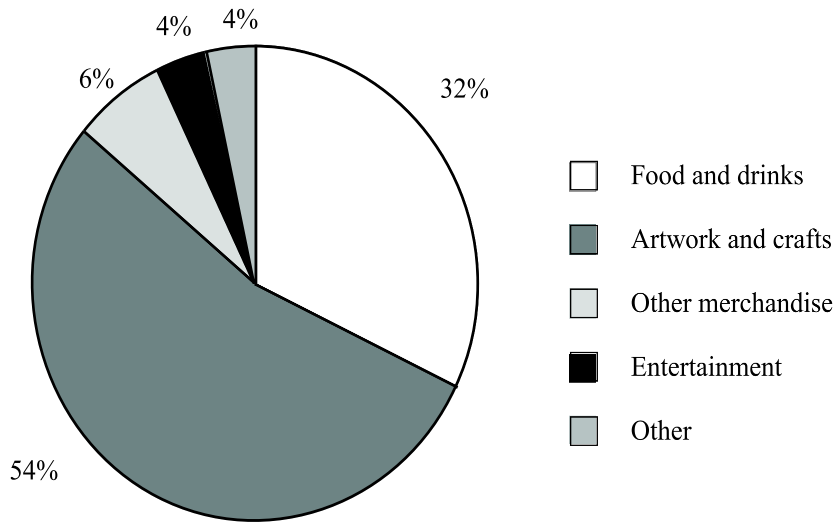
Spending by arts patrons helps suppor t local businesses such as restaurants, retail shops, artisans, and gasoline stations. This study estimates two sources of spending: 1) spending at arts festivals, and 2) other spending in Norman by out-of-town visitors.

Approximately 83.1% of visitors to arts festivals spent money at festivals. For festivals, spending per group was $18.68 per group for Norman residents and $34.91 for nonresidents. The median group size was 2 persons for Norman residents and 3 persons for nonresidents.

Spending for artwork and crafts is the largest category of spending at festivals, accounting for 49% of total spending, followed by food and drinks (33%), other merchandise (10%), entertainment (6%), and other (2%).

Figure 2

On-site Spending by Category
Arts Festivals



Off-Site Spending in Norman by Out-of-town Visitors

The second type of spending documented by this study is off-site spending in Norman by out-of-town visitors. Spending by visitors from out-of-town constitutes a net impact on the Norman economy.

As noted earlier, 43.3% of festival patrons and 41.9% of theatre patrons are from out-of-town. Of these out-of-town visitors, 24.9% of festival patrons and 64.4% of theatre patrons spent money in Norman not at the arts event (off-site).

Major types of off-site spending are restaurants (29% of total spending), merchandise (29%), gasoline (9%), and other items (33%) including lodging, groceries, and other (chart).

Total off-site spending in Norman attributable to the four festivals and three theatrical productions was an estimated $1.1 million, occurring mostly due to the Medieval Fair. This spending represents a net contribution to the Norman economy, since the source of the spending is out-of-town visitors.

Impacts of Spending

The net effect of these arts events on the Norman economy is the sum of spending by out-of-town visitors. While Norman residents spent nearly $1.5 million at the arts festivals, it is probable that this spending would have occurred in Norman anyway for other types of entertainment such as movies, restaurants, clubs, and so on. Therefore, spending by Norman residents is not included in the net effect of the arts on the Norman economy.

Figure 3

Off-Site Spending by Category
Arts Festivals and Theatrical Productions

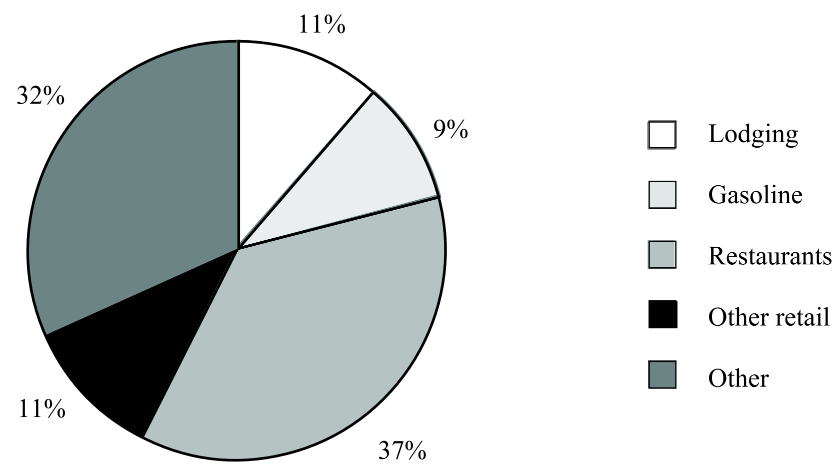


Table 8

Detailed Responses for Interviews at Festivals and Theatres

	Festivals				Theatres		
	Total Festivals	Medieval Fair	Midsummer Nights' Fair	Gourd Dance and Powwow	Total Theatres	Sooner Theatre	OU Theatre
Estimated Attendance	189,570	182,334	6,290	946	750	521	229
Interviews	530	296	186	48	105	73	32
	Percent of all respondents						
Gender							
Male	46.4%	49.7%	44.6%	33.3%	47.6%	45.2%	53.1%
Female	53.6%	50.3%	55.4%	66.7%	52.4%	54.8%	46.9%
Age Group							
18 to 29	17.5%	22.7%	9.1%	18.8%	13.3%	6.8%	28.1%
30 to 44	36.8%	38.0%	35.8%	33.3%	17.1%	17.8%	15.6%
45 to 64	40.4%	36.9%	46.0%	39.6%	49.5%	53.4%	40.6%
65 years+	5.3%	2.4%	9.1%	8.3%	20.0%	21.9%	15.6%
Do you live in Norman?							
No	43.3%	63.2%	12.8%	39.6%	41.9%	43.8%	37.5%
Yes	56.7%	36.8%	87.2%	60.4%	58.1%	56.2%	62.5%
	Percent of out-of-town visitors						
[If does not live in Norman] Is this event the primary reason for your visit to Norman?							
No	16.3%	15.8%	20.8%	15.8%	20.0%	6.1%	58.3%
Yes	83.7%	84.2%	79.2%	84.2%	80.0%	93.9%	41.7%
[If event is NOT the primary reason for visiting Norman]							
What IS the main reason for your visit to Norman?							
Visit friends/relatives	47.2%	50.0%	80.0%	100.0%	40.0%	33.3%	42.9%
Mom's Day	11.1%	20.0%	0.0%	0.0%	40.0%	0.0%	57.1%
Shopping	5.6%	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Business	13.9%	20.0%	20.0%	0.0%	0.0%	0.0%	0.0%
Other	11.1%	0.0%	0.0%	0.0%	20.0%	66.7%	0.0%
Sports event	11.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Where did you begin your trip to Norman?							
Oklahoma City	30.1%	30.4%	26.1%	31.6%	37.8%	48.5%	8.3%
Moore	12.8%	13.6%	13.0%	5.3%	6.7%	6.1%	8.3%
Edmond	3.1%	3.3%	0.0%	5.3%	2.2%	3.0%	0.0%
Midwest City	5.3%	4.9%	8.7%	5.3%	0.0%	0.0%	0.0%
Del City	1.3%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	0.4%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Other OKC MSA	15.9%	15.8%	13.0%	21.1%	15.6%	18.2%	8.3%
Other Oklahoma	21.2%	21.2%	21.7%	21.1%	20.0%	15.2%	33.3%
Out-of-State	9.7%	8.7%	17.4%	10.5%	17.8%	9.1%	41.7%

Table 8 (continued)

Detailed Responses for Interviews at Festivals and Theatres

	Festivals				Theatres		
	Total Festivals	Medieval Fair	Midsummer Nights' Fair	Gourd Dance and Powwow	Total Theatres	Sooner Theatre	OU Theatre
Did you stay in a hotel or motel in Norman (last night/plan to stay tonight)?							
No	98.1%	98.0%	98.9%	95.8%	96.2%	100.0%	87.5%
Yes	1.9%	2.0%	1.1%	4.2%	3.8%	0.0%	12.5%
Did you purchase any goods or services in Norman OUTSIDE of this event?							
No	75.1%	79.2%	54.2%	61.1%	35.6%	42.4%	16.7%
Yes	24.9%	20.8%	45.8%	38.9%	64.4%	57.6%	83.3%
	Percent of all respondents						
Did you attend this event last year?							
No	43.4%	40.5%	46.2%	50.0%	21.9%	26.0%	12.5%
Yes	56.6%	59.5%	53.8%	50.0%	68.6%	63.0%	81.3%
How did you learn about this event?							
Newspaper	24.7%	16.9%	36.9%	12.8%	32.4%	43.8%	3.1%
Radio	1.8%	1.7%	1.6%	2.1%	0.0%	0.0%	0.0%
Television	1.6%	2.4%	0.5%	0.0%	1.0%	1.4%	0.0%
Word of mouth	26.2%	25.4%	19.8%	44.7%	29.5%	27.4%	17.2%
Visit event in the past	33.3%	41.7%	23.5%	4.3%	0.0%	0.0%	0.0%
Other	3.6%	11.9%	17.6%	36.2%	11.4%	8.2%	9.4%
Poster, flyers	3.7%	0.0%	0.0%	0.0%	13.3%	2.7%	18.8%
Website	1.0%	0.0%	0.0%	0.0%	2.9%	2.7%	1.6%
Drove by, saw sign	1.6%	0.0%	0.0%	0.0%	5.7%	8.2%	31.3%
Member of organization	2.6%	0.0%	0.0%	0.0%	3.8%	5.5%	18.8%
Would you be spending money for other types of entertainment today if you had NOT visited this event?							
No	67.1%	68.5%	65.6%	64.6%	83.8%	93.2%	12.5%
Yes	29.9%	27.8%	32.8%	31.3%	15.2%	5.5%	37.5%
Don't know	3.0%	3.7%	1.6%	4.2%	1.0%	1.4%	31.3%
Did you spend money at this event?							
Yes	83.1%	91.2%	73.3%	70.8%	77.1%	100.0%	25.0%
No	16.9%	8.8%	26.7%	29.2%	22.9%	0.0%	75.0%

Appendix B:
Response Rates

Survey of Employers

A listing of arts organizations consisting of private employers, nonprofit organizations, and government employers was supplied to CEMR by the Norman Arts and Humanities Council. Questionnaires were e-mailed or mailed to 49 organizations. Seventeen responses were obtained after four follow-up attempts, a response rate of 35 percent. The completed interviews included the largest employing organizations.

Survey of Individual Artists

A listing of individual artists was obtained from the Coalition of Visual Artists. The list contained names and phone numbers for 125 artists who reside in Norman. After calls by CEMR interviewers, 30 were deemed ineligible (phone disconnected, artist no longer in practice, etc.), resulting in 95 eligible listings. Of these, 66 interviews were completed for a response rate of 69 percent.

Appendix C:
Questionnaires Used for Interviews

Questionnaire for Arts Organizations and Employers

Impact of the Arts on the Norman Economy
Center for Economic and Management Research
Michael F. Price College of Business
The University of Oklahoma
for the
Norman Arts and Humanities Council

Organization Name:______________________________

Your Name:___________________________________

Events and Attendance

Performances

Total number of performances ___________
(number of concerts, plays, etc.) ___________
Total number of paid admissions ___________

Exhibits

Number of permanent or temporary exhibits ___________
Total attendance at exhibits ___________

Outreach

Classes, workshops, or lectures ___________
Total number of classes, workshops, and lectures ___________
Total attendance ___________

School events
Number of schools that visited ___________
Total number of children ___________
What percent of school children were from Norman (best guess) ___________ %

Fairs and festivals

Number of fairs and festivals held or sponsored ___________
Estimated total attendance at fairs and festivals ___________
Percent of attendance from Norman (best guess) ___________ %

Total attendance for all events (estimated):

Paid ___________
Free ___________
Total ___________

Sources of Revenue	**Amount($)**
Admissions	________
Sales	
Publications	________
Concessions	________
Other sales	________
Contributions and grants	
Individuals	________
Corporate	________
Foundations	________
NAHC	________
Government	
State of Oklahoma	________
Federal	________
City of Norman	________
Other government	________
Other contributions and grants	________
Endowment/Investment income	________
Other Revenue (specify)	
____________________	________
____________________	________
Total Revenue	________
Expenditures	
Compensation	
Payroll	________
Benefits	________
Utilities (electricity, gas, water)	________
Rent (if any)	________
Office supplies and retail purchases (Norman only)	________
Advertising and printing (Norman only)	________
Other expenditures in Norman (specify)	
____________________	________
____________________	________
All other expenditures (specify)	
____________________	________
____________________	________
Total Expenditures	________

Employees	
Full-time	__________
Part-time	__________
Total	__________
In-Kind Contributions*	
Number of volunteers	__________
Hours of work contributed	__________
Value of goods donated	__________
Value of services donated	__________

*Approximate

Thank you for your assistance.

Questionnaire for Arts Patrons

Economic Impact of the Medieval Fair – 2001
Center for Economic and Management Research
Michael F. Price College of Business
The University of Oklahoma

Date: _______
Time: _______
Interviewer: ______

1) How long did you stay at the Medieval Fair today?
__________HOURS (round to the half-hour)

2) What time today did you arrive at the Medieval Fair?
__________TIME (hh:mm)

3) Are you a vendor or participant at the Medieval Fair?
1 YES
0 NO
8 REFUSED

4 How many people are in your group today?
___________PERSONS

5 Gender (DO NOT ASK)……………..
1 MALE
2 FEMALE

6) IF UNSURE, ASK: 'Are you…'
1 18 to 29 years old
2 30 to 44 years old
3 45 to 64 years old
4 65 years old or older

7) Do you live in Norman?
1 YES
0 NO
8 REFUSED

8) Now I want to ask you how much you spent today at the Medieval Fair, either on yourself or on other persons in your group. [We need to know the total amount this person spent, whether the spending was on themselves or other members of their group].

DID NOT SPEND ANY MONEY AT THE MEDIEVAL FAIR ____ (X)

[IF SPENT MONEY AT THE MEDIEVAL FAIR]

9) How much did you spend for:

Food and drinks (approximately)? ________

Artwork or crafts? ________

Other Merchandise? ________

Entertainment or games? ________

Other items? ________

[IF NOT FROM NORMAN]

10) Is the Medieval Fair the MAIN reason for your visit to Norman?

1 YES
0 NO
8 REFUSED

[IF MEDIEVAL FAIR NOT MAIN REASON]

11) What is the MAIN reason for your visit to Norman?

1 visit friends or relatives
2 Mom's day at OU
3 shopping
4 business
5 passing through to other destination
6 attend other local event:_________________________
7 Other ____

12) Where did you begin your trip to Norman?

1 Oklahoma City
2 Moore
3 Edmond
4 Midwest City
5 Del City
6 Other _______________________

13) Would you mind telling me that zip code?

_____________ ZIP (refused=88888)

14) Did you spend the night in a motel or hotel last night IN NORMAN?

1 YES
0 NO
8 REFUSED

15) Have you purchased goods or services in Norman OUTSIDE of the Medieval Fair during your visit?

1 YES
0 NO
8 REFUSED

[IF YES]

16) Please tell me how much you spent for:

Lodging	________
Gasoline	________
Restaurants	________
Groceries	________
Other retail purchases	________
Other (specify)	_________

[ASK ONLY IF TODAY IS SUNDAY]

17) Did you attend Medieval Fair Saturday?

1 YES
0 NO
8 REFUSED

[ASK ONLY IF TODAY IS SATURDAY OR SUNDAY]

18) Did you attend Medieval Fair Friday?

1 YES
0 NO
8 REFUSED

[ALL RESPONDENTS]

19) Did you attend the Medieval Fair LAST YEAR?

1 YES
0 NO
8 REFUSED

20) How did you learn about the Medieval Fair?

1 Newspaper article
2 Radio
3 Television
4 Friend/family told me about it
5 Have visited Medieval Fair in past
6 Other _______________________

21) Suppose you had not visited the Medieval Fair today. Would you be spending money for other types of entertainment in Norman today?

1 YES
0 NO
7 DON'T KNOW
8 REFUSED

22) What did you like LEAST about the Medieval Fair this year?

23) What did you like MOST?

THANK YOU FOR YOUR COOPERATION!

Telephone Interview of Individual Artists

Hello, this is [Interviewer] calling from the Center for Economic and Management Research at The University of Oklahoma. We would like you to participate in a study of the economic impact of artists and the arts on the Norman economy. The economic impact study is funded by the Norman Arts and Humanities Council and directed by David Penn, Ph.D. , from the Center for Economic and Management Research, Michael F. Price College of Business, The University of Oklahoma. The study will help document the importance of the arts for the Norman economy.

Your name was selected from a list provided by the Norman Art and Humanities Council. Your responses will be kept completely confidential by our research center and never connected to your name.

My questions will take three minutes or less. You may stop participating at any time and may decline to answer any question you do not feel comfortable answering. You will not be penalized in any way if you choose not to participate in this study and there is no direct benefit or risk to you from participating.

At the completion of the interview I will give you telephone numbers in case you have questions concerning the study or questions concerningyour rights as a participant in the study.

Would you answer some questions for us?
This should only take 5 minutes.

Q1: First question: Do you live in Norman?

Q2: Which of the following art forms are you involved with?

[READ LIST; CHECK ALL THAT APPLY]

1 Music
2 Dance
3 Drama
4 Painting
5 Graphic arts
6 Photography
7 Sculpture
8 Any others?

Q3: How many events, shows, or performances did you participate in during the past 12 months?
[Enter 777 for don't know; 888 for refused] Number:______

Q4: Approximately, what percent of these events were in Norman?
[Enter 777 for don't know; 888 for refused] Percent:______

Q5: Are you a full-time artist?
1 Yes
2 No, part-time
7 Don't Know
8 Refused

Q6: Do you employ anyone (excluding yourself) as part of your work in the arts?
1 Yes
2 No
7 Don't Know
8 Refused
IF (ANS != 1) SKIPTO Q8

Q7: [Asked only if Q6 is yes.] How many do you employ (both part-time and full-time)?
[Enter 777 for don't know; 888 for refused] Number:______

Q8: How much revenue did you generate during the past twelve months solely from sales of art or income from performances? Was it:

1 None
2 Less than $5,000 but more than zero
3 More than $5000 but less than $15,000
4 More than $15,000 but less than $25,000
5 More than $25,000 but less than $35,000
6 More than $35,000
7 Don't know
8 Refused

Q9: Approximately what percent of your revenue or income came from sales of art or performances within Norman?
[Enter 777 for don't know; 888 for refused] Percent:_______

Q: QEND
T: 10 14
That's the end of our questions!

If you have questions about the study that I have been unable to answer, please call the study's principal investigator, David Penn, at 405-325-4757 for questions about your rights as a participant in this study.

Thank you for your assistance!

SELECTED INDICATORS FOR OKLAHOMA

	4th Qtr '02	3rd Qtr '02	4th Qtr '01	Percentage Change '02/'01 4th Qtr.	Percentage Change 4th Qtr '02 3rd Qtr '02
Crude Oil Production (000 bbl)[a]	19,079	17,038	17,210	10.9	12.0
Natural Gas Production (000 mcf)[b]	392,045	389,589	416,617	-5.9	0.6
Rig Count	95	102	93	2.2	-6.9
Intial Unemployment Claims	30,595	23,666	29,844	2.5	29.3
Permit-Authorized Construction					
Residential Single Family					
Dollar Value ($000)	306,283	378,992	182,953	67.4	-19.2
Number of Units	2,268	2,743	1,469	54.4	-17.3
Residential-Multi Family					
Dollar Value ($000)	10,833	24,129	6,148	76.2	-55.1
Number of Units	253	418	114	121.9	-39.5
Total Construction ($000)	317,116	403,121	189,101	67.7	-21.3
Employment					
Total Labor Force (000)[c]	1,688.3	1,699.3	1,688.8	0.0	-0.6
Total Employment (000)	1,615.6	1,629.0	1,621.4	-0.4	-0.8
Unemployment Rate (%)	4.2	4.1	4.0	–	–
Wage and Salary Employment (000)	1,532.0	1,515.7	1,524.9	0.5	1.1
Manufacturing	173,500	175,367	176,900	-1.9	-1.1
Mining	32,267	32,933	31,167	3.5	-2.0
Government	307,600	289,367	304,533	1.0	6.3
Contract Construction	66,867	67,267	64,667	3.4	-0.6
Services	443,467	445,900	439,367	0.9	-0.5
Retail Trade	283,100	278,933	283,033	0.0	1.5
Average Weekly Hours (Per Worker)					
Manufacturing	39.4	39.1	36.8	7.1	0.8
Average Weekly Earnings ($ Per Worker)					
Manufacturing	548.21	545.12	485.79	12.8	0.6
Contract Construction	630.90	631.92	635.37	-0.7	-0.2

Note: Includes revisions in some previous months.
[a]Figures are for 2nd Qtr 2002. Crude oil includes condensate. Natural gas includes casinghead gas.
[b] Sales of larger private owned utility companies.
[c]Labor Force refer to place of residence, non-agricultural wage and salary employment refers to place of work.

OKLAHOMA GENERAL BUSINESS INDEX

	Dec. '02	Preliminary Forcecast Dec. '01	Dec. '00	Percentage Change '02/'01 Dec.	Percentage Change '02/'00 Dec.
State	128.6	128.0	130,1	0.5	-1.2
Oklahoma City MSA	130.3	129.1	130.2	0.9	0.1
Tulsa MSA	129.1	131.0	133.8	-1.5	-3.5

ADJUSTED RETAIL TRADE FOR METRO AREAS AND STATE ($ Seasonally Adjusted)

	4th Qtr '02	3rd Qtr '02	4th Qtr '01	Percentage Change '02/'01 4th Qtr	Percentage Change 4th Qtr '02 3rd Qtr '02
OKLAHOMA CITY MSA					
Durable Goods	580,717,910	591,881,389	595,805,405	-2.5	-1.9
Lumber, Building Materials and Hardware	187,044,328	188,997,679	185,147,805	1.0	-1.0
Auto Accessories and Repair	88,581,329	88,968,020	93,064,769	-4.8	-0.4
Furniture	77,236,844	76,970,854	76,108,017	1.5	0.3
Computer, Electronics and Music Stores	90,037,463	96,127,518	105,272,171	-14.5	-6.3
Miscellaneous Durables	121,272,055	124,389,885	120,471,989	0.7	-2.5
Used Merchandise	16,545,891	16,427,434	15,740,653	5.1	0.7
Nondurable Goods	1,624,643,352	1,611,646,902	1,593,842,647	1.9	0.8
General Merchandise	575,065,321	574,604,452	551,971,932	4.2	0.1
Food Stores	273,937,732	273,922,375	298,181,085	-8.1	0.0
Apparel	106,877,183	105,733,755	103,057,588	3.7	1.1
Eating and Drinking Places	331,478,150	327,093,319	326,473,878	1.5	1.3
Drug Stores	37,562,310	37,507,962	36,930,805	1.7	0.1
Liquor Stores	20,671,267	20,362,556	19,267,388	7.3	1.5
Miscellaneous Nondurables	82,348,235	89,825,811	99,159,933	-17.0	-8.3
Gasoline	196,703,153	182,596,673	158,800,039	23.9	7.7
Total Retail Trade	2,205,361,262	2,203,528,291	2,189,648,053	0.7	0.1
TULSA MSA					
Durable Goods	413,724,810	430,436,810	462,982,450	-10.6	-3.9
Lumber, Building Materials and Hardware	130,816,585	130,083,323	125,032,446	4.6	0.6
Auto Accessories and Repair	55,286,381	56,292,879	60,724,039	-9.0	-1.8
Furniture	52,992,435	54,230,980	52,223,807	1.5	-2.3
Computer, Electronics and Music Stores	76,190,768	87,941,751	119,964,195	-36.5	-13.4
Miscellaneous Durables	85,354,085	88,771,078	91,613,627	-6.8	-3.8
Used Merchandise	13,084,557	13,116,799	13,424,336	-2.5	-0.2
Nondurable Goods	1,200,022,282	1,187,191,127	1,185,642,869	1.2	1.1
General Merchandise	421,435,099	413,524,961	410,037,728	2.8	1.9
Food Stores	234,808,202	233,687,527	252,953,243	-7.2	0.5
Apparel	75,464,883	74,105,611	71,367,434	5.7	1.8
Eating and Drinking Places	215,409,118	218,212,176	217,074,058	-0.8	-1.3
Drug Stores	30,955,300	29,442,192	28,495,824	8.6	5.1
Liquor Stores	16,943,304	16,888,692	16,393,568	3.4	0.3
Miscellaneous Nondurables	59,584,753	66,334,594	71,920,932	-17.2	-10.2
Gasoline	145,421,623	134,995,374	117,400,084	23.9	7.7
Total Retail Trade	1,613,747,092	1,617,627,938	1,648,625,319	-2.1	-0.2
ENID MSA					
Durable Goods	22,950,568	23,942,120	25,038,234	-8.3	-4.1
Lumber, Building Materials and Hardware	8,046,074	8,878,760	9,297,040	-13.5	-9.4
Auto Accessories and Repair	4,959,534	5,095,048	5,436,171	-8.8	-2.7
Furniture	1,974,929	1,882,648	1,742,823	13.3	4.9
Computer, Electronics and Music Stores	2,045,892	2,184,363	2,748,251	-25.6	-6.3
Miscellaneous Durables	5,320,227	5,263,528	5,184,710	2.6	1.1
Used Merchandise	603,914	637,774	629,239	-4.0	-5.3

ADJUSTED RETAIL TRADE FOR METRO AREAS AND STATE ($ Seasonally Adjusted)

	4th Qtr '02	3rd Qtr '02	4th Qtr '01	Percentage Change '02/'01 4th Qtr	Percentage Change 4th Qtr '02 3rd Qtr '02
ENID MSA					
Nondurable Goods	75,445,487	78,330,588	85,630,688	-11.9	-3.7
General Merchandise	26,067,398	26,863,188	29,050,709	-10.3	-3.0
Food Stores	20,229,623	20,917,765	22,004,488	-8.1	-3.3
Apparel	3,820,112	3,706,335	3,537,002	8.0	3.1
Eating and Drinking Places	12,673,746	13,111,918	13,630,732	-7.0	-3.3
Drug Stores	2,549,109	2,619,150	2,795,121	-8.8	-2.7
Liquor Stores	715,147	742,862	736,363	-2.9	-3.7
Miscellaneous Nondurables	4,206,536	4,142,783	4,881,663	-13.8	1.5
Gasoline	5,183,817	6,226,586	8,994,610	-42.4	-16.7
Total Retail Trade	98,396,055	102,272,708	110,668,922	-11.1	-3.8
LAWTON MSA					
Durable Goods	30,204,184	29,974,800	31,886,679	-5.3	0.8
Lumber, Building Materials and Hardware	7,948,381	7,606,855	8,504,831	-6.5	4.5
Auto Accessories and Repair	6,406,401	6,465,422	6,524,538	-1.8	-0.9
Furniture	3,405,984	3,372,330	2,964,202	14.9	1.0
Computer, Electronics and Music Stores	3,015,847	3,388,974	4,922,780	-38.7	-11.0
Miscellaneous Durables	8,277,146	8,082,606	7,782,472	6.4	2.4
Used Merchandise	1,150,425	1,058,613	1,187,857	-3.2	8.7
Nondurable Goods	133,929,629	132,220,212	127,574,497	5.0	1.3
General Merchandise	60,475,213	60,459,887	58,163,361	4.0	0.0
Food Stores	19,001,488	19,632,458	19,672,860	-3.4	-3.2
Apparel	6,894,617	6,386,367	6,486,391	6.3	8.0
Eating and Drinking Places	24,190,249	23,819,953	23,556,959	2.7	1.6
Drug Stores	2,498,591	2,400,776	2,142,811	16.6	4.1
Liquor Stores	904,225	837,996	907,077	-0.3	7.9
Miscellaneous Nondurables	6,112,997	5,961,992	5,581,834	9.5	2.5
Gasoline	13,852,250	12,720,783	11,063,204	25.2	8.9
Total Retail Trade	164,133,813	162,195,012	159,461,176	2.9	1.2
OKLAHOMA					
Durable Goods	1,518,622,804	1,508,786,932	1,624,266,161	-6.5	0.7
Lumber, Building Materials and Hardware	480,627,731	486,376,747	473,104,247	1.6	-1.2
Auto Accessories and Repair	265,004,866	266,990,785	261,128,100	1.5	-0.7
Furniture	177,955,069	173,463,095	171,193,275	3.9	2.6
Computer, Electronics and Music Stores	233,710,129	239,096,221	340,253,226	-31.3	-2.3
Miscellaneous Durables	316,839,491	299,411,067	326,896,254	-3.1	5.8
Used Merchandise	44,485,518	43,449,016	51,691,059	-13.9	2.4
Nondurable Goods	4,687,694,087	4,551,352,942	4,717,281,149	-0.6	3.0
General Merchandise	1,672,396,077	1,563,256,560	1,722,883,131	-2.9	7.0
Food Stores	966,735,672	978,401,967	1,009,990,404	-4.3	-1.2
Apparel	247,155,243	235,101,312	262,015,744	-5.7	5.1
Eating and Drinking Places	794,971,429	805,319,826	808,864,538	-1.7	-1.3
Drug Stores	97,896,021	94,836,951	99,759,741	-1.9	3.2
Liquor Stores	55,933,028	52,218,132	56,296,464	-0.6	7.1
Miscellaneous Nondurables	237,078,126	238,201,352	259,961,202	-8.8	-0.5
Gasoline	615,528,490	584,016,843	497,509,925	23.7	5.4
Total Retail Trade	6,206,316,891	6,060,139,874	6,341,547,310	-2.1	2.4

ADJUSTED RETAIL TRADE FOR SELECTED CITIES ($ Seasonally Adjusted)

				Percentage Change	
	4th Qtr '02	3rd Qtr '02	4th Qtr '01	'02/'01 4th Qtr	4th Qtr '02 3rd Qtr '0
Ada	55,427,739	54,557,931	52,765,911	5.0	1.6
Altus	42,192,637	42,293,812	42,945,612	-1.8	-0.2
Alva	13,106,373	13,070,039	13,253,146	-1.1	0.3
Anadarko	14,411,260	14,350,445	14,205,319	1.4	0.4
Ardmore	87,480,367	81,316,480	77,060,255	13.5	7.6
Bartlesville	92,892,241	91,592,503	92,780,602	0.1	1.4
Blackwell	12,159,086	11,892,106	10,606,857	14.6	2.2
Broken Arrow	128,642,650	126,167,225	121,166,654	6.2	2.0
Chickasha	34,785,109	34,862,012	35,535,003	-2.1	-0.2
Clinton	19,348,148	19,079,091	19,471,422	-0.6	1.4
Cushing	14,903,222	15,048,002	15,280,084	-2.5	-1.0
Del City	27,404,941	27,397,517	27,486,818	-0.3	0.0
Duncan	47,500,203	48,629,249	48,832,855	-2.7	-2.3
Durant	42,195,693	39,825,407	34,410,835	22.6	6.0
Edmond	169,386,943	165,851,863	154,626,553	9.5	2.1
El Reno	27,224,570	27,427,574	27,303,244	-0.3	-0.7
Elk City	31,141,815	32,287,263	32,473,292	-4.1	-3.5
Enid	98,738,426	100,573,833	104,092,017	-5.1	-1.8
Guthrie	19,681,576	19,372,072	19,106,741	3.0	1.6
Guymon	21,841,148	22,394,720	23,594,319	-7.4	-2.5
Henryetta	12,251,857	11,983,258	11,813,956	3.7	2.2
Hobart	5,827,745	5,952,036	5,975,944	-2.5	-2.1
Holdenville	7,760,076	7,873,796	8,237,015	-5.8	-1.4
Hugo	16,736,642	16,915,758	16,461,620	1.7	-1.1
Idabel	15,797,337	15,759,758	16,226,211	-2.6	0.2
Lawton	155,991,919	152,316,802	150,905,977	3.4	2.4
McAlester	64,114,078	63,298,913	62,797,943	2.1	1.3
Miami	29,592,994	29,528,225	30,222,343	-2.1	0.2
Midwest City	132,095,521	130,230,172	129,685,623	1.9	1.4
Moore	73,293,502	72,064,588	73,500,770	-0.3	1.7
Muskogee	110,866,003	109,869,187	106,935,095	3.7	0.9
Norman	235,101,487	227,967,239	223,622,787	5.1	3.1
Oklahoma City	1,235,969,284	1,218,199,220	1,212,949,088	1.9	1.5
Okmulgee	36,108,535	36,231,396	35,971,792	0.4	-0.3
Pauls Valley	20,012,722	19,797,819	19,608,069	2.1	1.1
Pawhuska	5,297,128	5,148,490	5,228,622	1.3	2.9
Ponca City	66,116,607	67,365,725	68,455,222	-3.4	-1.9
Poteau	31,228,004	31,060,884	30,746,701	1.6	0.5
Sand Springs	44,354,674	44,132,670	45,966,226	-3.5	0.5
Sapulpa	48,602,809	48,007,760	49,491,732	-1.8	1.2
Seminole	18,753,659	18,678,883	19,737,856	-5.0	0.4
Shawnee	88,636,962	87,560,707	84,804,743	4.5	1.2
Stillwater	103,326,280	102,333,060	100,432,516	2.9	1.0
Tahlequah	60,004,480	59,602,332	49,728,122	20.7	0.7
Tulsa	1,115,307,367	1,118,936,264	1,158,442,593	-3.7	-0.3
Watonga	4,565,885	4,615,980	4,934,115	-7.5	-1.1
Weatherford	25,466,048	24,626,591	24,632,795	3.4	3.4
Wewoka	3,022,638	2,989,940	2,907,447	4.0	1.1
Woodward	40,996,970	40,635,081	40,998,927	0.0	0.9
Total Selected Cities	4,807,663,359	4,761,671,677	4,758,419,389	1.0	1.0

SELECTED INDICATORS FOR THE ENID AND LAWTON MSA'S AND MUSKOGEE MA

	4th Qtr '02	3rd Qtr '02	4th Qtr '01	Percentage Change '02/'01 4th Qtr	Percentage Change 4th Qtr '02 3rd Qtr '02
ENID MSA					
Employment (Number)					
Labor Force[a]	25,793	26,433	25,970	-0.7	-2.4
Total Employment	25,087	25,727	25,243	-0.6	-2.5
Unemployment Rate (%)	2.8	2.7	2.8	--	--
Wage and Salary Employment	23,700	23,567	23,567	0.6	0.6
Wholesale and Retail Trade	6,267	6,300	6,200	1.1	-0.5
Manufacturing	2,500	2,500	2,500	0.0	0.0
Permit-Authorized Construction					
Residential-Single Family					
Dollar Value ($000)	4,375	8,233	1,896	130.7	-46.9
Number of Units	24	38	11	118.2	-36.8
Residential-Multi Family					
Dollar Value ($000)	3,240	110	350	E	E
Number of Units	28	3	4	E	E
Total Construction ($000)	7,615	8,343	2,246	239.0	-8.7
LAWTON MSA					
Employment (Number)					
Labor Force[a]	40,840	41,667	39,970	2.2	-2.0
Total Employment	39,573	40,397	38,607	2.5	-2.0
Unemployment Rate (%)	3.1	3.0	3.4	--	--
Wage and Salary Employment	39,733	39,600	39,233	1.3	0.3
Wholesale and Retail Trade	8,600	8,500	8,733	-1.5	1.2
Manufacturing	3,800	3,767	3,767	0.9	0.9
Permit-Authorized Construction					
Residential-Single Family					
Dollar Value ($000)	2,774	5,763	3,424	-19.0	-51.9
Number of Units	23	47	29	-20.7	-51.1
Residential-Multi Family					
Dollar Value ($000)	0	0	0	--	--
Number of Units	0	0	0	--	--
Total Construction ($000)	2,774	5,763	3,424	-19.0	-51.9
MUSKOGEE MA					
Employment (Number)					
Labor Force[a]	31,040	31,513	31,530	-1.6	-1.5
Total Employment	29,520	30,147	30,123	-2.0	-2.1
Unemployment Rate (%)	4.9	4.4	4.5	--	--
Water Transportation					
Port of Muskogee					
Tons In	120,667	125,279	92,461	30.5	-3.7
Tons Out	30,625	25,866	22,540	35.9	18.4

Note: Includes revisions.
[a]Civilian Labor Force.
E = Exceeds 600 percent.

SELECTED INDICATORS FOR THE TULSA MSA

	4th Qtr '02	3rd Qtr '02	4th Qtr '01	Percentage Change '02/'01 4th Qtr	Percentage Change 4th Qtr '02 3rd Qtr '02
Employment (Number)					
Labor Force[a]	428,117	432,313	427,180	0.2	-1.0
Total Employment	406,817	412,260	411,183	-1.1	-1.3
Unemployment Rate (%)	4.9	4.6	3.7	--	--
Wage and Salary Employment	410,800	407,767	410,133	0.2	0.7
Manufacturing	56,667	56,867	56,700	-0.1	-0.4
Mining	5,700	5,700	6,100	-6.6	0.0
Government	45,533	42,700	45,567	-0.1	6.6
Wholesale and Retail Trade	90,267	89,467	92,333	-2.2	0.9
Average Weekly Earnings					
Manufacturing ($ Per Worker)	619.54	609.66	649.91	-4.7	1.0
Air Transportation					
Passengers Enplaning (Number)	360,399	373,470	363,827	-0.9	-3.5
Passengers Deplaning (Number)	356,437	374,887	359,896	-1.0	-4.9
Freight (Tons)	13,064	12,077	11,674	11.9	8.2
Water Transportation					
Tulsa Port of Catoosa					
Tons In	241,281	212,883	263,360	-8.4	13.3
Tons Out	270,746	347,751	268,812	0.7	-22.1
Permit-Authorized Construction					
Residential-Single Family					
Dollar Value ($000)	92,479	143,366	94,617	-2.3	-35.5
Number of Units	650	1,025	753	-13.7	-36.6
Residential-Multi Family					
Dollar Value ($000)	5,271	10,934	26,254	-79.9	-51.8
Number of Units	171	173	473	-63.8	-1.2
Total Construction	97,750	154,300	120,871	-19.1	-36.6

Note: Includes revisions.
[a]Civilian Labor Force.
E = Exceeds 600 percent.

SELECTED INDICATORS FOR OKLAHOMA CITY MSA

	4th Qtr '02	3rd Qtr '02	4th Qtr '01	Percentage Change '02/'01 4th Qtr	Percentage Change 4th Qtr '02 3rd Qtr '02
Employment (Number)					
Labor Force[a]	559,587	562,423	567,207	-1.3	-0.5
Total Employment	537,750	541,000	544,423	-1.2	-0.6
Unemployment Rate (%)	3.8	3.8	4.0	--	--
Wage and Salary Employment	552,300	543,867	547,100	1.0	1.6
Manufacturing	47,433	48,200	49,767	-4.7	-1.6
Mining	7,600	7,667	7,533	0.9	-0.9
Government	106,833	100,267	106,967	-0.1	6.5
Wholesale and Retail Trade	129,500	127,933	128,800	0.5	1.2
Average Weekly Earnings					
Manufacturing ($ Per Worker)	620.45	601.98	517.52	19.9	3.1
Air Transportation					
Passengers Enplaning (Number)	409,512	411,052	376,303	8.8	-0.4
Passengers Deplaning (Number)	404,284	421,968	367,955	9.9	-4.2
Freight Enplaned (Tons)	3,912	3,683	3,830	2.1	6.2
Freight Deplaned (Tons)	4,807	4,595	4,613	4.2	4.6
Permit-Authorized Construction					
Residential-Single Family					
Dollar Value ($000)	166,456	193,939	138,014	20.6	-14.2
Number of Units	1,288	1,382	1,011	27.4	-6.8
Residential-Multi Family					
Dollar Value ($000)	648	9,922	101,995	-99.4	-93.5
Number of Units	114	166	640	-82.2	-31.3
Total Construction ($000)	167,104	203,861	240,009	-30.4	-18.0

Note: Includes revisions.
[a]Civilian Labor Force.

SELECTED INDICATORS FOR OKLAHOMA

	2002	2001	Percentage Change '02/'01
Crude Oil Production (000 bbl)[a]	69,486	71,483	-2.8
Natural Gas Production (000 mcf)[b]	1,649,860	1,657,713	-0.5
Rig Count (Average)	91	129	-29.5
Intial Unemployment Claims	105,994	95,727	10.7
Permit-Authorized Construction			
Residential Single Family			
Dollar Value ($000)	1,345,090	1,126,374	19.4
Number of Units	10,100	8,613	17.3
Residential-Multi Family			
Dollar Value ($000)	93,997	178,422	-47.3
Number of Units	1,480	2,172	-31.9
Total Construction ($000)	1,439,087	1,304,796	10.3
Employment			
Total Labor Force (000)[c]	1,694.7	1,663.0	1.9
Total Employment (000)	1,621.3	1,607.7	0.8
Unemployment Rate (%)	4.3	3.3	--
Wage and Salary Employment (000)	1,518.8	1,509.2	0.6
Manufacturing	174,625	178,492	-2.2
Mining	32,283	31,392	2.8
Government	300,783	295,608	1.8
Contract Construction	65,725	63,775	3.1
Services	441,443	436,967	1.0
Retail Trade	278,417	276,392	0.7
Average Weekly Hours (Per Worker)			
Manufacturing	38.7	38.3	1.0
Average Weekly Earnings ($ Per Worker)			
Manufacturing	539.94	495.70	8.9
Contract Construction	627.73	630.63	-0.5

Note: Includes revisions in some previous months.

[a]Crude oil includes condensate. Natural gas includes casinghead gas. Includes eleven months of data for 2001 and 2000.

[b]Sales of larger private owned utility companies.

[c]Civilian Labor Force. Labor Force employment and unemployment rate refer to place of residence, non-agricultural wage and salary employment refers to place of work.

ADJUSTED RETAIL TRADE FOR METRO AREAS AND STATE ($000 Seasonally Adjusted)

	2002	2001	Percentage Change '02/'01
OKLAHOMA CITY MSA			
Durable Goods	2,376,801,089	2,323,032,445	2.3
Lumber, Bldg. Mat. & Hardware	764,978,894	721,082,555	6.1
Auto Accessories and Repair	360,942,768	379,223,802	-4.8
Furniture	309,763,999	300,520,686	3.1
Computer, Electronics and Music Stores	378,482,951	374,607,965	1.0
Miscellaneous Durables	496,516,534	483,119,180	2.8
Used Merchandise	66,115,943	64,478,258	2.5
Nondurable Goods	6,440,781,087	6,402,625,970	0.6
General Merchandise	2,295,828,868	2,185,731,503	5.0
Food Stores	1,116,897,993	1,218,544,781	-8.3
Apparel	424,550,062	417,702,822	1.6
Eating and Drinking Places	1,315,235,341	1,257,097,844	4.6
Drug Stores	149,095,941	151,769,130	-1.8
Liquor Stores	81,914,240	76,716,602	6.8
Miscellaneous Nondurables	343,344,197	355,475,136	-3.4
Gasoline	713,914,445	739,588,152	-3.5
Total Retail Trade	8,817,582,177	8,725,658,415	1.1
TULSA MSA			
Durable Goods	1,753,398,316	1,819,423,398	-3.6
Lumber, Bldg. Mat. & Hardware	520,485,875	509,632,682	2.1
Auto Accessories and Repair	231,734,789	249,390,239	-7.1
Furniture	216,186,671	210,303,576	2.8
Computer, Electronics and Music Stores	366,576,103	420,646,143	-12.9
Miscellaneous Durables	364,322,108	376,372,433	-3.2
Used Merchandise	54,092,771	53,078,325	1.9
Nondurable Goods	4,750,092,619	4,763,965,848	-0.3
General Merchandise	1,632,644,099	1,583,407,441	3.1
Food Stores	955,368,078	1,038,308,711	-8.0
Apparel	299,239,588	295,830,430	1.2
Eating and Drinking Places	885,090,728	856,823,845	3.3
Drug Stores	118,994,426	119,593,988	-0.5
Liquor Stores	67,803,644	64,356,458	5.4
Miscellaneous Nondurables	263,156,236	258,868,778	1.7
Gasoline	527,795,822	546,776,198	-3.5
Total Retail Trade	6,503,490,935	6,583,389,247	-1.2
ENID MSA			
Durable Goods	97,860,533	98,121,450	-0.3
Lumber, Bldg. Mat. & Hardware	36,223,274	34,867,731	3.9
Auto Accessories and Repair	21,102,744	22,181,406	-4.9
Furniture	7,297,108	6,872,139	6.2
Computer, Electronics and Music Stores	8,767,306	10,400,994	-15.7
Miscellaneous Durables	21,794,589	21,098,512	3.3
Used Merchandise	2,675,513	2,700,668	-0.9

ADJUSTED RETAIL TRADE FOR METRO AREAS AND STATE ($000 Seasonally Adjusted)

	2002	2001	Percentage Change '02/'01
ENID MSA			
Nondurable Goods	321,727,974	345,013,171	-6.7
General Merchandise	110,612,221	115,399,381	-4.1
Food Stores	85,001,310	88,757,065	-4.2
Apparel	15,282,638	15,469,203	-1.2
Eating and Drinking Places	53,562,716	53,322,925	0.4
Drug Stores	10,844,721	11,173,325	-2.9
Liquor Stores	2,982,602	2,922,185	2.1
Miscellaneous Nondurables	16,723,604	17,138,581	-2.4
Gasoline	26,718,161	40,830,506	-34.6
Total Retail Trade	419,588,507	443,134,621	-5.3
LAWTON MSA			
Durable Goods	122,081,228	121,859,795	0.2
Lumber, Bldg. Mat. & Hardware	32,242,043	32,787,575	-1.7
Auto Accessories and Repair	26,051,111	25,993,442	0.2
Furniture	13,004,885	12,884,248	0.9
Computer, Electronics and Music Stores	14,155,557	15,446,577	-8.4
Miscellaneous Durables	32,503,615	30,955,897	5.0
Used Merchandise	4,124,018	3,792,056	8.8
Nondurable Goods	526,640,324	520,260,122	1.2
General Merchandise	241,704,280	238,804,795	1.2
Food Stores	78,532,749	79,206,421	-0.9
Apparel	25,726,852	24,949,338	3.1
Eating and Drinking Places	95,303,439	92,939,867	2.5
Drug Stores	9,429,816	8,447,790	11.6
Liquor Stores	3,347,002	3,175,359	5.4
Miscellaneous Nondurables	22,711,590	21,211,810	7.1
Gasoline	49,884,596	51,524,741	-3.2
Total Retail Trade	648,721,552	642,119,917	1.0
OKLAHOMA			
Durable Goods	6,140,920,514	6,271,049,852	-2.1
Lumber, Bldg. Mat. & Hardware	2,013,595,969	2,015,400,577	-0.1
Auto Accessories and Repair	1,075,346,431	1,065,144,846	1.0
Furniture	701,572,652	679,980,615	3.2
Computer, Electronics and Music Stores	972,662,273	1,124,952,394	-13.5
Miscellaneous Durables	1,207,155,555	1,207,785,482	-0.1
Used Merchandise	170,587,635	177,785,937	-4.0
Nondurable Goods	18,531,538,128	18,702,397,541	-0.9
General Merchandise	6,408,121,093	6,393,795,212	0.2
Food Stores	3,964,117,150	4,188,772,145	-5.4
Apparel	982,403,666	987,287,962	-0.5
Eating and Drinking Places	3,284,279,457	3,217,395,945	2.1
Drug Stores	380,908,082	385,803,638	-1.3
Liquor Stores	211,749,105	202,008,146	4.8
Miscellaneous Nondurables	983,058,963	986,635,425	-0.4
Gasoline	2,316,900,614	2,340,699,067	-1.0
Total Retail Trade	24,672,458,642	24,973,447,393	-1.2

ADJUSTED RETAIL TRADE IN SELECTED CITIES ($000 Seasonally Adjusted)

	2002	2001	Percentage Change '02/'01
Ada	217,534,869	214,988,531	1.2
Altus	170,602,004	169,446,049	0.7
Alva	52,131,134	54,196,682	-3.8
Anadarko	57,635,272	57,483,503	0.3
Ardmore	323,771,727	313,012,163	3.4
Bartlesville	367,421,606	373,739,055	-1.7
Blackwell	47,339,228	42,299,361	11.9
Broken Arrow	498,125,318	480,804,507	3.6
Chickasha	141,721,103	142,775,108	-0.7
Clinton	75,475,175	79,800,910	-5.4
Cushing	60,870,633	59,462,414	2.4
Del City	109,662,732	114,544,645	-4.3
Duncan	194,251,171	196,874,224	-1.3
Durant	154,988,518	139,730,193	10.9
Edmond	665,989,545	613,450,074	8.6
El Reno	109,811,215	113,156,492	-3.0
Elk City	127,737,544	131,876,723	-3.1
Enid	408,273,412	422,401,370	-3.3
Guthrie	77,172,202	77,373,451	-0.3
Guymon	90,589,262	94,468,911	-4.1
Henryetta	47,862,748	48,436,055	-1.2
Hobart	24,163,482	24,088,883	0.3
Holdenville	31,468,552	32,466,415	-3.1
Hugo	67,829,905	66,478,425	2.0
Idabel	63,924,199	65,185,895	-1.9
Lawton	608,039,412	606,288,330	0.3
McAlester	253,623,381	251,674,626	0.8
Miami	118,447,076	118,909,283	-0.4
Midwest City	529,080,592	535,714,818	-1.2
Moore	288,328,327	272,573,437	5.8
Muskogee	437,081,668	436,819,427	0.1
Norman	914,242,300	889,828,050	2.7
Oklahoma City	4,873,401,404	4,836,647,306	0.8
Okmulgee	145,404,539	138,214,452	5.2
Pauls Valley	78,671,862	80,985,708	-2.9
Pawhuska	20,695,159	20,396,654	1.5
Ponca City	270,235,329	273,404,440	-1.2
Poteau	124,981,983	124,302,112	0.5
Sand Springs	178,078,343	186,962,522	-4.8
Sapulpa	194,321,485	198,574,116	-2.1
Seminole	75,464,229	78,081,740	-3.4
Shawnee	346,578,422	341,853,387	1.4
Stillwater	407,354,769	407,481,768	0.0
Tahlequah	237,757,821	191,691,086	24.0
Tulsa	4,525,113,110	4,667,602,491	-3.1
Watonga	19,625,238	20,088,063	-2.3
Weatherford	98,268,297	99,817,280	-1.6
Wewoka	11,872,007	11,948,773	-0.6
Woodward	161,806,632	170,823,004	-5.3
Total Selected Cities	19,104,825,940	19,089,222,910	0.1

SELECTED INDICATORS FOR THE ENID AND LAWTON MSAs AND MUSKOGEE COUNTY

	2002	2001	Percentage Change '02/'01
ENID MSA			
Employment (Number)			
Labor Force[a]	26,118	25,816	1.2
Total Employment	25,397	25,173	0.9
Unemployment Rate (%)	2.8	2.5	--
Wage and Salary Employment	23,583	23,575	0.0
Wholesale and Retail Trade	6,217	6,167	0.8
Manufacturing	2,492	2,517	-1.0
Permit-Authorized Construction			
Residential-Single Family			
Dollar Value ($000)	17,037	7,555	125.5
Number of Units	88	43	104.7
Residential-Multi Family			
Dollar Value ($000)	5,647	4,449	26.9
Number of Units	83	106	-21.7
Total Construction ($000)	22,684	12,004	89.0
LAWTON MSA			
Employment (Number)			
Labor Force[a]	41,381	40,273	2.8
Total Employment	40,019	39,099	2.4
Unemployment Rate (%)	3.3	2.9	--
Wage and Salary Employment	39,558	38,975	1.5
Wholesale and Retail Trade	8,542	8,650	-1.2
Manufacturing	3,808	3,775	0.9
Permit-Authorized Construction			
Residential-Single Family			
Dollar Value ($000)	17,357	14,571	19.1
Number of Units	144	123	17.1
Residential-Multi Family			
Dollar Value ($000)	50	25	100.0
Number of Units	10	5	100.0
Total Construction ($000)	17,407	14,596	19.3
MUSKOGEE MA			
Employment (Number)			
Labor Force[a]	31,393	31,165	0.7
Total Employment	29,938	30,010	-0.2
Unemployment Rate (%)	4.6	3.7	--
Water Transportation			
Port of Muskogee			
Tons In	462,160	430,116	7.5
Tons Out	105,536	69,025	52.9

Note: Includes revisions.
[a]Civilian Labor Force.
E = Exceeds 600 percent.

SELECTED INDICATORS FOR THE TULSA MSA

	2002	2001	Percentage Change '02/'01
Employment (Number)			
Labor Force[a]	429,678	421,727	1.9
Total Employment	409,548	409,295	0.1
Unemployment Rate (%)	4.7	2.9	--
Wage and Salary Employment	408,108	407,350	0.2
Manufacturing	56,783	56,350	0.8
Mining	5,708	6,158	-7.3
Government	44,633	44,208	1.0
Wholesale and Retail Trade	89,600	91,933	-2.5
Average Weekly Earnings			
Manufacturing ($ Per Worker)	611.84	639.25	-4.3
Air Transportation			
Passengers Enplaning (Number)	1,457,952	1,622,670	-10.2
Passengers Deplaning (Number)	1,449,356	1,621,745	-10.6
Freight (Tons)	48,188	48,638	-0.9
Water Transportation			
Tulsa Port of Catoosa			
Tons In	916,990	1,049,594	-12.6
Tons Out	1,285,070	993,098	29.4
Permit-Authorized Construction			
Residential-Single Family			
Dollar Value ($000)	485,770	441,188	10.1
Number of Units	3,611	3,398	6.3
Residential-Multi Family			
Dollar Value ($000)	51,782	26,254	97.2
Number of Units	681	473	44.0
Total Construction	537,552	467,442	15.0

Note: Includes revisions.
[a]Civilian Labor Force.
E = Exceeds 600 percent.

SELECTED INDICATORS FOR OKLAHOMA CITY MSA

	2002	2001	Percentage Change '02/'01
Employment (Number)			
Labor Force[a]	561,498	559,216	0.4
Total Employment	538,760	540,456	-0.3
Unemployment Rate (%)	4.0	3.4	---
Wage and Salary Employment	545,792	542,867	0.5
Manufacturing	47,858	51,158	-6.5
Mining	7,600	7,400	2.7
Government	104,983	105,375	-0.4
Wholesale and Retail Trade	127,617	127,000	0.5
AverageWeekly Earnings			
Manufacturing ($ Per Worker)	588.48	523.29	12.5
Air Transportation			
Passengers Enplaning (Number)	1,593,496	1,665,153	-4.3
Passengers Deplaning (Number)	1,599,912	1,656,542	-3.4
Freight Enplaned (Tons)	15,879	17,092	-7.1
Freight Deplaned (Tons)	19,235	20,520	-6.3
Permit-Authorized Construction			
Residential-Single Family			
Dollar Value ($000)	718,576	589,720	21.9
Number of Units	5,372	4,418	21.6
Residential-Multi Family			
Dollar Value ($000)	16,928	130,107	-87.0
Number of Units	281	1,170	-76.0
Total Construction ($000)	735,504	719,827	2.2

Note: Includes revisions.
[a]Civilian Labor Force.
E = Exceeds 600 percent.