

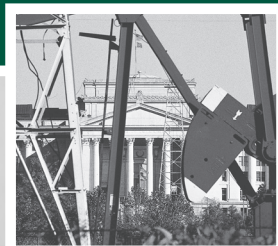


Center for Economic & Management Research



# OKLAHOMA BUSINESS BULLETIN

Monthly Digest



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**OVERVIEW**

Created by the Oklahoma Territorial Legislature in 1890, 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. The Norman campus serves as home to all of the university's academic programs except health-related fields. Both the Norman and Health Sciences Center colleges offer programs at the Schusterman Center, the site of OU-Tulsa. The OU Health Sciences Center, which is located in Oklahoma City, is one of only four comprehensive academic health centers in the nation with seven professional colleges. OU enrolls more than 30,000 students, has more than 2,400 full-time faculty members, and has 21 colleges offering 163 majors at the baccalaureate level, 166 majors at the master's level, 81 majors at the doctoral level, 27 majors at the doctoral professional level, and 26 graduate certificates. The university's annual operating budget is \$1.5 billion. The University of Oklahoma is an equal opportunity institution.

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*Note: includes comments from Dr. Dauffenbach, OU Price College*

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*Note: includes comments from Dr. Dauffenbach, OU Price College*

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## ADJUSTED RETAIL TRADE FOR METRO AREAS AND STATE

|   | October 2017         | September 2017       | October 2016         | Percentage Change  |                    |
|---|----------------------|----------------------|----------------------|--------------------|--------------------|
|   |                      |                      |                      | Oct '17<br>Oct '16 | Oct '17<br>Sep '17 |
| <b>OKLAHOMA</b>                         |                      |                      |                      |                    |                    |
| <b>Durable Goods</b>                    | <b>839,273,776</b>   | <b>839,635,654</b>   | <b>850,563,144</b>   | -1.3               | 0.0                |
| Lumber, Building Materials and Hardware | 293,952,104          | 298,127,495          | 299,359,627          | -1.8               | -1.4               |
| Auto Accessories and Repair             | 191,910,826          | 190,021,853          | 180,737,146          | 6.2                | 1.0                |
| Furniture                               | 81,903,053           | 81,665,398           | 83,466,430           | -1.9               | 0.3                |
| Computer, Electronics and Music Stores  | 118,468,110          | 116,697,759          | 128,114,261          | -7.5               | 1.5                |
| Miscellaneous Durables                  | 136,496,817          | 136,680,710          | 143,438,408          | -4.8               | -0.1               |
| Used Merchandise                        | 16,542,868           | 16,442,439           | 15,447,272           | 7.1                | 0.6                |
| <b>Nondurable Goods</b>                 | <b>2,518,872,397</b> | <b>2,553,745,931</b> | <b>2,409,151,694</b> | 4.6                | -1.4               |
| General Merchandise                     | 808,447,130          | 804,065,272          | 785,156,498          | 3.0                | 0.5                |
| Food Stores                             | 305,250,894          | 305,409,817          | 301,566,971          | 1.2                | -0.1               |
| Apparel                                 | 128,807,370          | 127,501,747          | 127,691,932          | 0.9                | 1.0                |
| Eating and Drinking Places              | 655,844,757          | 650,760,531          | 616,721,774          | 6.3                | 0.8                |
| Drug Stores                             | 45,814,756           | 45,934,301           | 52,904,254           | -13.4              | -0.3               |
| Liquor Stores                           | 48,925,589           | 48,638,315           | 42,214,314           | 15.9               | 0.6                |
| Miscellaneous Nondurables               | 140,481,833          | 140,607,359          | 132,514,398          | 6.0                | -0.1               |
| Gasoline                                | 385,300,067          | 430,828,588          | 350,381,553          | 10.0               | -10.6              |
| <b>Total Retail Trade</b>               | <b>3,358,146,173</b> | <b>3,393,381,584</b> | <b>3,259,714,838</b> | 3.0                | -1.0               |
| <b>OKLAHOMA CITY MSA</b>                |                      |                      |                      |                    |                    |
| <b>Durable Goods</b>                    | <b>322,503,811</b>   | <b>321,872,455</b>   | <b>312,879,326</b>   | 3.1                | 0.2                |
| Lumber, Building Materials and Hardware | 111,758,110          | 112,185,836          | 106,237,792          | 5.2                | -0.4               |
| Auto Accessories and Repair             | 65,767,574           | 65,594,579           | 63,610,164           | 3.4                | 0.3                |
| Furniture                               | 33,762,912           | 33,635,523           | 32,715,103           | 3.2                | 0.4                |
| Computer, Electronics and Music Stores  | 44,383,367           | 43,916,124           | 42,891,693           | 3.5                | 1.1                |
| Miscellaneous Durables                  | 60,017,131           | 59,791,504           | 61,237,564           | -2.0               | 0.4                |
| Used Merchandise                        | 6,814,718            | 6,748,890            | 6,187,010            | 10.1               | 1.0                |
| <b>Nondurable Goods</b>                 | <b>851,882,065</b>   | <b>871,885,524</b>   | <b>851,110,966</b>   | 0.1                | -2.3               |
| General Merchandise                     | 291,384,448          | 288,518,667          | 266,072,339          | 9.5                | 1.0                |
| Food Stores                             | 87,694,643           | 88,056,002           | 91,552,287           | -4.2               | -0.4               |
| Apparel                                 | 60,321,943           | 59,860,740           | 56,841,317           | 6.1                | 0.8                |
| Eating and Drinking Places              | 247,442,880          | 248,570,439          | 256,431,533          | -3.5               | -0.5               |
| Drug Stores                             | 18,750,363           | 18,533,961           | 16,753,558           | 11.9               | 1.2                |
| Liquor Stores                           | 17,518,092           | 17,444,332           | 16,915,219           | 3.6                | 0.4                |
| Miscellaneous Nondurables               | 50,116,692           | 50,062,750           | 48,558,692           | 3.2                | 0.1                |
| Gasoline                                | 78,653,004           | 100,838,633          | 97,986,022           | -19.7              | -22.0              |
| <b>Total Retail Trade</b>               | <b>1,174,385,876</b> | <b>1,193,757,979</b> | <b>1,163,990,292</b> | 0.9                | -1.6               |
| <b>TULSA MSA</b>                        |                      |                      |                      |                    |                    |
| <b>Durable Goods</b>                    | <b>210,792,688</b>   | <b>209,473,030</b>   | <b>202,563,013</b>   | 4.1                | 0.6                |
| Lumber, Building Materials and Hardware | 70,919,550           | 70,899,037           | 69,831,403           | 1.6                | 0.0                |
| Auto Accessories and Repair             | 30,925,719           | 30,699,947           | 29,273,120           | 5.6                | 0.7                |
| Furniture                               | 23,699,556           | 23,539,398           | 22,112,125           | 7.2                | 0.7                |
| Computer, Electronics and Music Stores  | 36,974,921           | 36,487,890           | 35,388,976           | 4.5                | 1.3                |
| Miscellaneous Durables                  | 43,211,525           | 42,830,997           | 41,225,155           | 4.8                | 0.9                |
| Used Merchandise                        | 5,061,416            | 5,015,761            | 4,732,233            | 7.0                | 0.9                |
| <b>Nondurable Goods</b>                 | <b>698,306,239</b>   | <b>685,332,439</b>   | <b>632,080,783</b>   | 10.5               | 1.9                |
| General Merchandise                     | 179,229,738          | 181,165,567          | 194,811,845          | -8.0               | -1.1               |
| Food Stores                             | 99,997,414           | 98,333,166           | 86,818,675           | 15.2               | 1.7                |
| Apparel                                 | 30,185,996           | 30,773,103           | 33,681,626           | -10.4              | -1.9               |
| Eating and Drinking Places              | 205,576,964          | 199,817,681          | 164,802,285          | 24.7               | 2.9                |
| Drug Stores                             | 14,210,699           | 14,531,820           | 16,068,944           | -11.6              | -2.2               |
| Liquor Stores                           | 14,844,005           | 14,650,887           | 12,581,393           | 18.0               | 1.3                |
| Miscellaneous Nondurables               | 34,409,876           | 33,763,004           | 29,131,971           | 18.1               | 1.9                |
| Gasoline                                | 119,851,547          | 112,297,212          | 94,184,043           | 27.3               | 6.7                |
| <b>Total Retail Trade</b>               | <b>909,098,927</b>   | <b>894,805,469</b>   | <b>834,643,795</b>   | 8.9                | 1.6                |

## ADJUSTED RETAIL TRADE FOR METRO AREAS AND STATE

|   | October 2017      | September 2017    | October 2016      | Percentage Change  |                    |
|---|-------------------|-------------------|-------------------|--------------------|--------------------|
|   |                   |                   |                   | Oct '17<br>Oct '16 | Oct '17<br>Sep '17 |
| <b>LAWTON MSA</b>                       |                   |                   |                   |                    |                    |
| <b>Durable Goods</b>                    | <b>17,175,456</b> | <b>17,277,926</b> | <b>18,282,387</b> | -6.1               | -0.6               |
| Lumber, Building Materials and Hardware | 6,349,463         | 6,423,391         | 6,859,765         | -7.4               | -1.2               |
| Auto Accessories and Repair             | 2,999,995         | 3,002,293         | 3,008,309         | -0.3               | -0.1               |
| Furniture                               | 1,892,912         | 1,885,172         | 1,872,430         | 1.1                | 0.4                |
| Computer, Electronics and Music Stores  | 2,405,753         | 2,438,077         | 2,981,268         | -19.3              | -1.3               |
| Miscellaneous Durables                  | 3,232,671         | 3,230,463         | 3,254,645         | -0.7               | 0.1                |
| Used Merchandise                        | 294,661           | 298,530           | 305,969           | -3.7               | -1.3               |
| <b>Nondurable Goods</b>                 | <b>67,245,186</b> | <b>66,613,757</b> | <b>67,825,625</b> | -0.9               | 0.9                |
| General Merchandise                     | 23,167,279        | 23,771,091        | 27,416,318        | -15.5              | -2.5               |
| Food Stores                             | 5,911,645         | 5,832,804         | 5,704,996         | 3.6                | 1.4                |
| Apparel                                 | 3,044,468         | 3,139,134         | 3,440,848         | -11.5              | -3.0               |
| Eating and Drinking Places              | 20,760,238        | 20,243,239        | 18,501,626        | 12.2               | 2.6                |
| Drug Stores                             | 615,423           | 643,293           | 796,320           | -22.7              | -4.3               |
| Liquor Stores                           | 1,018,789         | 1,064,313         | 1,498,950         | -32.0              | -4.3               |
| Miscellaneous Nondurables               | 3,420,591         | 3,389,439         | 3,152,955         | 8.5                | 0.9                |
| Gasoline                                | 9,306,753         | 8,530,443         | 7,313,612         | 27.3               | 9.1                |
| <b>Total Retail Trade</b>               | <b>84,420,642</b> | <b>83,891,683</b> | <b>86,108,012</b> | -2.0               | 0.6                |
| <b>ENID MICROSA</b>                     |                   |                   |                   |                    |                    |
| <b>Durable Goods</b>                    | <b>14,576,923</b> | <b>14,531,852</b> | <b>14,491,938</b> | 0.6                | 0.3                |
| Lumber, Building Materials and Hardware | 5,193,799         | 5,208,682         | 5,587,529         | -7.0               | -0.3               |
| Auto Accessories and Repair             | 3,806,087         | 3,796,112         | 3,702,677         | 2.8                | 0.3                |
| Furniture                               | 933,826           | 934,258           | 1,062,706         | -12.1              | 0.0                |
| Computer, Electronics and Music Stores  | 1,769,796         | 1,755,051         | 1,954,662         | -9.5               | 0.8                |
| Miscellaneous Durables                  | 2,515,751         | 2,485,219         | 1,873,321         | 34.3               | 1.2                |
| Used Merchandise                        | 357,665           | 352,530           | 311,043           | 15.0               | 1.5                |
| <b>Nondurable Goods</b>                 | <b>46,057,302</b> | <b>44,679,199</b> | <b>43,474,058</b> | 5.9                | 3.1                |
| General Merchandise                     | 13,041,116        | 13,244,565        | 14,434,580        | -9.7               | -1.5               |
| Food Stores                             | 7,295,790         | 7,186,855         | 6,817,888         | 7.0                | 1.5                |
| Apparel                                 | 2,010,934         | 2,038,596         | 2,168,657         | -7.3               | -1.4               |
| Eating and Drinking Places              | 12,085,020        | 11,744,844        | 10,308,244        | 17.2               | 2.9                |
| Drug Stores                             | 818,613           | 847,508           | 1,035,539         | -20.9              | -3.4               |
| Liquor Stores                           | 696,984           | 694,636           | 778,537           | -10.5              | 0.3                |
| Miscellaneous Nondurables               | 2,472,518         | 2,417,457         | 1,929,688         | 28.1               | 2.3                |
| Gasoline                                | 7,636,327         | 6,504,739         | 6,000,925         | 27.3               | 17.4               |
| <b>Total Retail Trade</b>               | <b>60,634,225</b> | <b>59,211,051</b> | <b>57,965,996</b> | 4.6                | 2.4                |

The November distribution of sales tax collections by the Oklahoma Tax Commission primarily represents local tax receipts from September. The monies they reported this period represent sales from September 16th to September 30th and estimated sales from Oct 1st to Oct

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**ADJUSTED RETAIL TRADE FOR SELECTED CITIES**

|                          | October 2017  | September 2017 | October 2016  | Percentage Change  |                    |
|--------------------------|---------------|----------------|---------------|--------------------|--------------------|
|                          |               |                |               | Oct '17<br>Oct '16 | Oct '17<br>Sep '17 |
| Ada                      | 28,000,954    | 27,923,787     | 27,379,225    | 2.3                | 0.3                |
| Altus                    | 18,348,607    | 18,301,146     | 18,048,467    | 1.7                | 0.3                |
| Alva                     | 6,480,579     | 6,496,933      | 6,602,022     | -1.8               | -0.3               |
| Anadarko                 | 5,379,200     | 5,375,799      | 5,308,710     | 1.3                | 0.1                |
| Ardmore                  | 38,286,655    | 38,219,370     | 37,897,301    | 1.0                | 0.2                |
| Bartlesville             | 37,804,537    | 37,780,832     | 37,985,681    | -0.5               | 0.1                |
| Blackwell                | 5,627,242     | 5,597,396      | 5,331,508     | 5.5                | 0.5                |
| Broken Arrow             | 86,600,981    | 85,968,925     | 81,396,509    | 6.4                | 0.7                |
| Chickasha                | 19,780,516    | 19,573,016     | 17,637,692    | 12.1               | 1.1                |
| Clinton                  | 8,842,172     | 8,754,385      | 7,721,482     | 14.5               | 1.0                |
| Cushing                  | 9,557,075     | 9,536,881      | 9,545,846     | 0.1                | 0.2                |
| Del City                 | 18,948,703    | 18,978,388     | 18,912,244    | 0.2                | -0.2               |
| Duncan                   | 22,958,633    | 22,972,117     | 23,458,406    | -2.1               | -0.1               |
| Durant                   | 25,916,146    | 25,814,190     | 24,498,203    | 5.8                | 0.4                |
| Edmond                   | 112,129,184   | 111,938,168    | 109,411,948   | 2.5                | 0.2                |
| El Reno                  | 15,236,500    | 15,032,060     | 12,922,108    | 17.9               | 1.4                |
| Elk City                 | 20,422,208    | 20,188,819     | 17,643,015    | 15.8               | 1.2                |
| Enid                     | 53,640,978    | 53,492,761     | 53,896,970    | -0.5               | 0.3                |
| Guthrie                  | 12,696,756    | 12,557,765     | 11,084,934    | 14.5               | 1.1                |
| Guymon                   | 12,974,308    | 12,957,111     | 12,778,659    | 1.5                | 0.1                |
| Henryetta                | 5,688,496     | 5,676,347      | 5,598,807     | 1.6                | 0.2                |
| Hobart                   | 2,506,865     | 2,500,973      | 2,448,779     | 2.4                | 0.2                |
| Holdenville              | 4,078,384     | 4,053,654      | 3,841,070     | 6.2                | 0.6                |
| Hugo                     | 6,794,947     | 6,814,777      | 7,026,813     | -3.3               | -0.3               |
| Idabel                   | 8,748,636     | 8,681,672      | 8,257,743     | 5.9                | 0.8                |
| Lawton                   | 69,232,099    | 69,559,052     | 73,392,925    | -5.7               | -0.5               |
| McAlester                | 29,357,022    | 29,272,829     | 28,305,878    | 3.7                | 0.3                |
| Miami                    | 13,070,398    | 13,039,524     | 12,519,431    | 4.4                | 0.2                |
| Midwest City             | 57,495,555    | 57,411,501     | 56,815,347    | 1.2                | 0.1                |
| Moore                    | 61,815,350    | 61,480,767     | 58,389,722    | 5.9                | 0.5                |
| Muskogee                 | 45,899,598    | 45,798,593     | 43,041,156    | 6.6                | 0.2                |
| Norman                   | 122,870,583   | 122,936,530    | 124,274,820   | -1.1               | -0.1               |
| Oklahoma City            | 608,991,345   | 607,243,903    | 594,934,047   | 2.4                | 0.3                |
| Okmulgee                 | 11,640,786    | 11,621,946     | 11,180,843    | 4.1                | 0.2                |
| Pauls Valley             | 10,820,906    | 10,785,239     | 10,399,125    | 4.1                | 0.3                |
| Pawhuska                 | 4,567,603     | 4,450,041      | 2,735,803     | 67.0               | 2.6                |
| Ponca City               | 27,472,980    | 27,266,205     | 25,513,779    | 7.7                | 0.8                |
| Poteau                   | 13,283,148    | 13,251,190     | 12,940,325    | 2.6                | 0.2                |
| Sand Springs             | 22,463,419    | 22,501,726     | 22,820,712    | -1.6               | -0.2               |
| Sapulpa                  | 15,974,573    | 16,102,410     | 18,311,697    | -12.8              | -0.8               |
| Seminole                 | 9,729,107     | 9,688,983      | 8,986,178     | 8.3                | 0.4                |
| Shawnee                  | 43,619,951    | 43,474,481     | 41,622,281    | 4.8                | 0.3                |
| Stillwater               | 58,112,368    | 57,938,056     | 57,266,382    | 1.5                | 0.3                |
| Tahlequah                | 23,658,047    | 23,713,388     | 23,996,821    | -1.4               | -0.2               |
| Tulsa                    | 509,958,653   | 507,403,995    | 492,308,017   | 3.6                | 0.5                |
| Watonga                  | 3,121,322     | 3,063,681      | 2,518,979     | 23.9               | 1.9                |
| Weatherford              | 16,979,578    | 16,796,651     | 14,880,633    | 14.1               | 1.1                |
| Wewoka                   | 1,455,836     | 1,442,906      | 1,326,140     | 9.8                | 0.9                |
| Woodward                 | 20,639,220    | 20,582,473     | 20,026,776    | 3.1                | 0.3                |
| Total Selected<br>Cities | 2,389,678,712 | 2,382,013,346  | 2,325,141,959 | 2.78               | 0.32               |

The November distribution of sales tax collections by the Oklahoma Tax Commission primarily represent local tax receipts from September business. The monies they reported this period represent sales from Sep 16th to Sep 30th and estimated sales from Oct 1st to Oct 15th.

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## CENTER FOR ECONOMIC AND MANAGEMENT RESEARCH



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Front cover photo of oil well on the state capitol grounds, courtesy of Fred Marvel, Oklahoma Department of Tourism.