

WORKFORCE & TARGET INDUSTRY ANALYSIS

Enid Regional Development Alliance

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WORKFORCE & TARGET INDUSTRY ANALYSIS OVERVIEW





REGIONAL DEVELOPMENT ALLIANCE The Enid Regional Development Alliance engaged Site Selection Group ("SSG"), a Dallasbased location advisory firm, to help it conduct a labor study and target industry analysis to help better position the community for attracting, retaining, and growing primary industry.

While SSG focuses most of its time and energy on helping corporate clients identify the optimal location for a new facility, from time to time we are engaged by economic development or similar organizations to help them conduct some type of objective analysis to help them better attract, retain, and grow those corporate clients.

This report includes the following sections, which is meant to mirror many of the same methods and approaches SSG would utilize if it were evaluating the regional workforce on behalf of a corporate client.

- Executive Summary, Approach & Strategic Recommendations: Overall approach to this engagement, summary findings, and recommendations on ways to improve the community's workforce value proposition.
- Underlying Demographics: Population, labor force, age, income, and education statistics.
- **Commuting Analysis:** Realistic labor shed for employers in Enid to attract workers from.
- **Occupational Dynamics:** Supply and demand of key occupational clusters aligned with Enid's industrial makeup and target industries.
- Educational Completions: Summary of educational completions in key categories.
- **Stakeholder Interviews**: Views from key community stakeholders including existing industry and training/education providers.
- **Target Industry Analysis**: Quantitative and qualitative analyses to identify target industry clusters for recruitment and expansion in the region.

SSG'S APPROACH TO WORKFORCE ANALYTICS



DEMOGRAPHICS



- Population Growth
- Age Profiles
- Educational Attainment
- Realistic Labor Shed

Are there enough and the right types of people to staff my operation?

Summary: A Balanced Approach to Workforce Analytics

OCCUPATIONAL DYNAMICS



 Supply, demand, and wages for key occupational clusters like production, logistics, maintenance, engineering, and other skill sets

How do I balance access to critical skills vs. competition?

WORKFORCE TRAINING



- K-12
- Technical Training
- Colleges & Universities
- Collaboration

Can I work with education & training now and in the future to meet hiring needs?

The graphic above shows the broad categories under which SSG performs workforce analyses on behalf of its corporate clients. While every project requirement is different and each is driven by different objectives, almost all clients want to be in a location that has 1) aligned demographics, 2) target mix of occupational supply and demand, and 3) robust workforce training and educational opportunities.

As a result, SSG applies the same perspective to its workforce analyses on behalf of economic development organizations and here, for the Enid Regional Development Alliance. It is critical to use this framework to identify where a community's workforce value proposition truly lies. For some markets, that value proposition could be based on favorable population and demographic trends. For others, it could be lower levels of competition.

COMPARISON MARKETS



Benchmarking Enid against Regional Competitors

In SSG's view, there is no such thing as the simple concept of a "good" workforce. While some markets have more favorable workforce conditions, there are always tradeoffs. For a community that has favorable growth and occupational presence, there may be higher competition and wage pressure. For more rural areas, there may be less competition but concerns with underlying long-term demographics.

As a result, like for corporate work, no workforce analysis is done in a vacuum. For this analysis, the map at left shows the comparison markets used herein to benchmark Enid against. These were selected to represent the types of communities Enid is likely to compete against for new industrial investment. For each market, we select an example industrial park to represent an actual location and drivetime that Enid could compete with, rather than comparing politically-designated geographies like counties or MSAs. In SSG's view, labor markets are fluid and don't stop at the county line.

Most of these markets are regionally concentrated, but we do include one southeastern market (Columbus, MS) as an example of a more rural community that has had significant success in recent years in attracting industrial investment.

Further, the analysis also includes some much larger markets, namely Oklahoma City, Tulsa, and Wichita. Obviously, these markets are much larger than Enid and the sheer number of people and workers in these markets will dwarf those in Enid. That being said, these are exactly the types of markets Enid is competing with to attract and retain corporate investment. Therefore, it's critical to understand how Enid stacks up both favorably and unfavorably against those markets.

14.

SUMMARY OF ENID WORKFORCE: STRENGTHS & CHALLENGES

Category	Description	Key <u>Enid</u> Strengths	Key <u>Enid</u> Challenges
Commuting	Realistic labor draw and commuting driving times	 The Enid workforce is heavily located in Enid and pitching a 20 minute max commute is a big advantage. 	? Other communities are going to pitch much larger labor sheds (which may be justified in some cases), but Enid's story is much cleaner and easier to tell.
Population & Labor Force	Underlying population and labor force that drive workforce availability	 Very low unemployment in the market (until COVID) demonstrates that this is a community that is working. 	 ? Labor force participation rate is relatively low and declining. This could be pitched as an opportunity to bring more folks in to the workforce. ? While population growth is just barely positive, it is dwarfed by growth in other markets.
Target Demographics	Age, income and educational attainment and alignment with industrial requirements	 Age profile of the region shows favorably, and Enid can sell against aging risk in other markets. 	? Relatively low percentage of people with a degree is likely to impact higher impact projects.
Production	Supply, demand, and wages for production workers including food, metal, chemical, and electronics	 Really strong concentration metrics across the board for production workers in the region. Food presence is especially strong. Favorable competition metrics, as well. 	? Sheer number of workers in a more rural region like Enid will be a challenge. Growth metrics are also much less favorable.
Maintenance	Supply, demand, and wages for industrial maintenance workers	 Concentration metrics for maintenance workers is even stronger than production workers. These skill sets are in heavy demand. 	? More elevated demand and wage inflation for these types of workers.
Engineering & Science	Supply, demand, and salaries for engineers and science workers with an industrial & manufacturing focus	 Relatively low demand and competition compared to other markets. 	Presence, concentration, and growth figures for engineers and "pure" science-related workers does not show well.
Logistics	Supply, demand, and wages for blue and white collar logistics workers	 Moderate presence and concentration of workers. Avoiding the influx of big box distribution seen in other markets is actually a big advantage for markets like Enid – you don't have to compete with Amazon. 	? No significant disadvantages here. In SSG's view, the occupational profile of logistics workers is good, without being overheated.
Healthcare	Supply, demand, and wages for direct health care workers.	 Moderate presence and concentration of workers in the region. 	? Really high relative demand for workers, but this tends to be a common issue in more rural areas.? Less favorable growth trends.
Business & IT	Supply, demand, and wages for business (finance & accounting) and IT workers.	 More favorable competitive structure and demand conditions compared to other larger markets. 	Pretty low concentration and overall presence of professional business workers. IT presence is even lower.
Supplemental Workforce	Supply, demand, and wages for service economy workers (retail, food) who with training can work in higher skill jobs.	 Moderate presence and concentration of these workers. 	 Cow historic growth trend points to lower potential slack in the labor market for upskilling these types of workers. Elevated demand for these jobs.



Workforce Training Summary

The below briefly summarizes the data-focused portion of the workforce training analyses, specifically focused on analyses of completions in the region:

- Proximity to OSU Supports a Strong Narrative for STEM Skill Sets: Obviously it's not directly in the community, but presence of a major research university at OSU (and the large number of engineering, science, and other grads there) is a major advantage for the community. The completion data, combined with profile analytics (where workers received education), along with other regional institutions at Northern Oklahoma College and Northwestern Oklahoma State University.
- Large Number of Completions in Industrial and Health at <u>Autry</u>: Especially for a technical training institution in a smaller market, the completion data for Autry shows a large number of completions in healthcare and industrial disciplines (Center, new retail, etc.) but also being more progressive as a community.
- Relatively Large and Increasing Number of IT Completions: Nearly every community struggles with producing enough IT graduates. Again, for a more rural region, the area produces a comparatively large number of IT graduates. Ensuring that the pipeline of students in these programs is a full as possible will be a critical consideration not just for IT and professional services operations, but as industrial requirements become more and more technical.

Stakeholder Interviews

SSG briefly summarizes its views of the Enid workforce through the eyes of employer and other key stakeholder interviews:

- Extremely Positive View of Workforce Training, Especially <u>Autry</u>: As referred to at left, this appears to be a community that "gets it" as it relates to workforce training. SSG was very pleased to hear the strong, positive view of Autry especially, but of all education partners in the community. In SSG's view, this is one of the better communities we've visited/researched in recent times as it relates to storytelling and engagement between training and employers.
- <u>Typical Rural Strengths and Weaknesses for Workforce</u> <u>Availability</u>: There were no big surprises as it related to employers' views of workforce availability in a more rural area. Employers reported general satisfaction with the quality and availability of workers, but highly skilled/training/specialized workers are simply tougher to find in a more rural community.
- Positive Trajectory on Quality of Place: Many interviewees noted the typical advantages and disadvantages of life in a more rural setting (e.g. less traffic vs. fewer places to shop). But several did note a sort of positive trajectory or momentum about the community in terms of both physical investments (e.g. Stride Center, new retail, etc.), but also being more progressive as a community.

STRATEGIC RECOMMENDATIONS & TARGET INDUSTRIES



Strategic Recommendations

- Highlight Training & Education: In SSG's view, Enid has one of the better workforce training and education stories that we've seen in a smaller market. Finding ways to fully leverage and tell that story across all stakeholders (not just specific institutions) can potentially resonate with prospects and help build a brand around training and education. It's overly simplistic, but one way to help craft that narrative is to focus on what the one-page, one-slide training value proposition looks like. SSG sees too many community training pitches that are lists of institutions and programs. We think Enid's training whole is greater than the sum of its parts, and as a result, effectively marketing that could be especially important.
- Hidden Workforce/Slack: In several areas, the data point to a potential hidden workforce (e.g. low participation rate). That could be a real opportunity for targeting that population for focused training efforts. We're certainly not suggesting that the community, Autry, and other stakeholders are not already doing that, but only that it could be both a way to better bring people into the workforce and/or tell the story of how that community is on the forefront of workforce training.
- Quality of Place for Professional Workers: SSG believes there's a strong value proposition for industrial requirements. A recruitment win is never easy, but SSG believes its fully achievable for these types of projects. The overall value proposition for a medium-to-large-scale professional services project, however, is much less likely. This is not just in places like Enid, but in smaller markets across the country. However, given the COVID pandemic, SSG believes there is opportunity for talent attraction and entrepreneurship strategies to better retain (and even attract) these types of workers to more rural communities. Again, we're not suggesting this is easy; it's a multi-pronged effort. But combining quality of place efforts with industrial recruitment (to attract and retain not just wage earners, but also engineers, finance & accounting, and management, could represent and appropriate balance.



Heavy Manufacturing & Assembly

- Production workforce and robust training ecosystem
- Potential rail access for high users
- ? Concerns on oil & gas competition
- ? Sheer size of workforce to support larger projects



Food Processing & Manufacturing

- ✓ Food production and agricultural experience
- Significant project activity
- Right geography for shifting materials out of California
- ✓ Major investments on water/wastewater
- ? Competitive dynamics with existing firms

<u>Aerospace</u>

- Park with access to runway
- Strong training story (overall) supported by training space at airport and CareerTech experience in industry
- Proximity to Wichita to show up on prospect radar
- ? Current workforce value proposition isn't as aligned

Automotive (Potential)

- ^t Con
- Fully contingent on Oklahoma (or regional) win of a major OEM
- Like Heavy Manufacturing cluster above, strong training and workforce value proposition
- Without major locate in region, very unlikely target

Entrepreneurship & Remote Work

- Very unique time for small markets to develop a strong remote work and entrepreneurship pitch to retain and attract professional talent
 - ? Few traditional projects in professional services space currently – and most are unlikely to consider small markets



COMMUTE ANALYSIS

COMMUTING SUMMARY: ENID



Key Commuting Drive Time Thresholds

	50 th Percentile	80 th Percentile
All Workers	9.7	21.4
Lower Wage Workers	8.7	20.3
Higher Wage Workers	10.8	26.7

<u>Summary</u>

- Every workforce analysis begins with a commuting and labor shed analysis to determine where an operation will draw the majority of its workers from.
- The table at left shows the travel times that workers employed in Enid travel from their homes. For example, 50% of all workers travel 9.7 minutes or less, while 80% of low wage workers travel 20.3 minutes or less.
- SSG typically uses the 80th percentile as a key threshold to determine the reasonable commute radius around a site or community. That is usually anywhere from a 35 to 50 minute drive time radius.
- But with that said, given the unique geographic positioning of Enid, SSG uses a broader 40 minute radius throughout the analysis here to capture the greater region and smaller communities from which employees may travel from. SSG also analyzed the data at a 20 minute radius, and that is provided separately in the appendix.



Detailed Commuting Drive Time Distribution around Enid

COMMUTING PATTERNS: ENID



Where Workers Employed in Enid Live



Summary

- The map here shows the block groups that individuals who work in Enid tend to live. Darker shaded areas show block groups where there's a higher concentration of resident workers who work in Enid.
- The map also overlays those key times shown in red (21.4 minutes for 80% of workers) and purple (40.0 minutes for a standard labor shed).
- Again, the vast majority of workers employed in Enid also live within the community. But again, we show that broader 40 minute drivetime to also show a reasonable community from which employers could attract workers from.



Comparison Commuting Drive Time Thresholds (in minutes)

	All Wages (50 th percentile)	All Wages (80 th percentile)
Wichita Falls (TX)	11.9	20.2
Enid	9.7	21.4
Wichita (KS)	15.8	23.6
Garden City (KS)	8.4	25.8
Tulsa (North)	21.4	28.8
Oklahoma City (South)	20.1	30.6
Ardmore	14.8	36.9
Columbus (MS)	26.3	41.6
Muskogee	22.3	48.2
Stillwater	21.8	65.7

<u>Summary</u>

- The table at left shows the same commuting data for all the comparison submarkets to give some relative sense for labor draw across the different markets. For most labor studies and corporate engagements, we typically assume a 35-45 minute commute draw for most communities.
- Enid's commuting profile looks very similar to many of the other regional markets, especially ones like Wichita Falls and Garden City.
- The biggest difference is that several of those other markets can boast longer workforce draws more towards 30 to 40+ minute drive times.
- While there can be value in promoting longer labor pulls, SSG would pitch Enid's results in terms of being a very realistic and very defendable labor pull, rather than one that is too "aggressive" and may pull in data for workers at far reaches of a commute zone that are really not likely to travel 40+ minutes for work.

DEMOGRAPHICS

Population (40 Minute Drive Time)



Labor Force (40 Minute Drive Time)



Population & Workforce Summary

- The charts at left show simply the absolute number of people and the labor force within a 40 minute drive time of each comparison point.
- Enid has approximately 75,000 people within that 40 minute drive time, and about 43,000 people in the labor force within that same drive time.
- It comes as no surprise that that figure is significantly smaller than numbers in much larger metro areas like Tulsa and Oklahoma City.
- For recruitment projects, this is clearly one of the bigger hurdles for Enid to overcome – to prove that it's fundamentally large enough to support the workforce needs of projects from 20 to 200 workers.

Population (20 Minute Drive Time)



Labor Force (20 Minute Drive Time)



Population & Workforce Summary

- To show the impact of using a broader drivetime on Enid, given its unique geographic positioning, the charts at left show the same baseline population and labor force data as on the previous page, but for a tighter 20 minute radius.
- Because Enid's population is much more concentrated (for a rural region), this 20 minute data is likely to show more favorably against other rural and semirural communities nearer population centers. For an example, a 40 minute commute for Muskogee starts pulling in data from the suburbs of Tulsa. A 40 minute drive time for a site in Columbus (MS) pulls in population from a number of communities like West Point and Starkville.
- This is simply meant to demonstrate that with a prospect, Enid can work to reposition its labor narrative (when appropriate) to demonstrate that although most companies and consultants are likely to use broader drive times to conduct analyses, in Enid the story is simpler and more believable since the vast majority of the workforce is right there in the community, rather than at a 30, 40, or even longer commute away.

Labor Force Participation Rate: MSA/County



Unemployment Rate: MSA/County



Labor Force Participation Rate Summary

- Labor force participation can be a useful indicator of whether there is any potential "slack" remaining in a market and how much of the population is working.
- Enid's labor force participation rate has been declining for several years, while most others' rates have been steady. This points to a potential challenge regarding structured workforce and population metrics in the community.

Unemployment Summary

- The chart at left shows historical unemployment rates for each comparison location over the past five years. The data obviously shows the first "blip" from the COVID-19 pandemic.
- Notwithstanding COVID-19, Enid's unemployment rate has trended slightly below rates in the other markets. Coupled with comparatively low labor force participation figures, the data indicates that the labor market in Enid has been extremely tight with few people coming off the sidelines to work.

Population Growth: Historic (2010-2019) and Projected Growth (2019-2024)



Median Age Stillwater 20% 24% 28.8 10% 13% 129 Garden City (KS) 30% 10% 14% 12% 31.9 Columbus (MS) 21% 17% 14% 14% 32.9 OKC (South) 25% 10% 34.6 15% 13% Wichita Falls (TX) 22% 13% 35.5 Wichita (KS) 26% 9% 14% 12% 14% 35.8 Enid 26% 9% 149 17% 36.4 Muskogee 26% 9% 14% 36.6 13% Tulsa (North) 25% 9% 15% 36.6 14% 13% Ardmore 26% 8% 37.6 12% □ Under 18 □ 18-24 □ 25-34 □ 35-44 45-54 55-64 65 and Up

Population Summary

- The figure at top right shows historic population growth (since 2010) and projected population growth over the next five years (to 2024).
- Historic and projected population growth is one of the most important figures in any workforce analysis.
 While the data show positive historic and projected growth for Enid, that growth is muted and significantly trails that in other markets.
- One can see the impact of using a broader 40 minute drivetime on the results for some markets. For example, the data for Muskogee shows very favorably, but is in fact driven by the growth at the outskirts of Tulsa, just within that 40 minute drive time.

Age Summary

- Companies place an increasingly large emphasis on locating in markets with a young, sustainable workforce. Whether explicitly looking for attractive markets for "millennials" or just markets that have long term demographic advantages, the age profile of a market can make a significant difference.
- As a rule of thumb, SSG typically considers markets with a median age above 40 to be of some concern. Enid's (and the other markets) are well below that. As a result, the overall age profile of the community shows favorably.
- One can clearly see the skew of results for a market like Stillwater, home to OSU and a lot of students.

Age Breakdown with Median Age

Income Breakdown with Median Income



Educational Attainment: Population 25+



Median Income

Income Summary

- Target income profiles can swing greatly by the type of requirement, with some companies wanting a higher income profile while some put more emphasis on moderate income levels as a proxy for skill and wage profiles.
- Enid's income profile falls right in the middle of the candidate communities. SSG does not see it as any cause for significant concern or advantage.

Educational Summary

- Like on income profiles, the target educational profile of a community can vary considerably by the type of project. That being said, for a premier site having a higher share of individuals with degrees (associate's, bachelor's, and above) can be seen as more favorable.
- Enid trends a bit toward the bottom of comparison markets when looking at percentage of individuals aged 25+ with a degree. Like other markets towards the bottom, there is a large share of individuals with a high school or below education only.

OCCUPATIONAL DYNAMICS



<u>Summary</u>

- The data below show presence, growth, and concentration statistics for the key occupational clusters examined herein within a 40 minute drivetime of Enid. We highlighted the "blue collar" occupational clusters in light blue, and those more "white collar" clusters in white.
- The table is sorted by location quotient (LQ), a measure of concentration of a particular occupation or industry in an area. An LQ greater than 1.00 means a higher concentration relative to the national average. We also draw a cutoff line at 1.00 in the table below.
- Overall, the data shows consistently high concentration of

production, maintenance, and logistics workers in the region, all aligned with the needs of industrial operations. There's a particularly high concentration of food production and maintenance workers.

- At the same time, the data shows much lower concentrations of more professional-oriented clusters.
- Also, historic growth rates over the past five years have been nearly all negative, but projections are more favorable.
- After additional industry and wage summaries, the remainder of this section shows detailed data for both the supply (occupational presence, concentration, historic/projected growth) and demand (relative demand, wage growth) for each occupational cluster.

Occupational Cluster	2014 Jobs	2019 Jobs	% Growth (Historic)	2024 Jobs	% Growth (Projected)	2019 Location Quotient	Median Cluster Wages	Relative Demand (Compared to other Markets)
Production - Food	1,225	1,227	0.15%	1,266	3.20%	2.27	\$16.07	• Low
Maintenance	687	692	0.66%	723	4.50%	1.99	\$28.50	• Moderate
Production - Electronics	1,515	1,405	-7.29%	1,416	0.77%	1.54	\$20.21	• Low
Production - Metal	1,491	1,386	-7.02%	1,399	0.91%	1.45	\$18.82	• Low
Production - All	2,752	2,598	-5.58%	2,654	2.15%	1.44	\$15.93	Low to moderate
Production - Chemical	723	713	-1.42%	725	1.73%	1.32	\$19.00	• Moderate
Logistics	1,970	1,975	0.27%	2,024	2.45%	1.16	\$16.25	Moderate
Supplemental	3,439	3,195	-7.09%	3,197	0.06%	0.95	\$9.23	• High
Healthcare	1,512	1,487	-1.67%	1,494	0.47%	0.86	\$26.19	• High
Science	193	128	-33.44%	127	-0.83%	0.67	\$31.41	• Moderate
Finance & Accounting	452	380	-15.77%	401	5.34%	0.53	\$28.05	• Moderate
Engineering	236	161	-31.81%	172	6.84%	0.49	\$44.31	Moderate
IT	429	377	-12.02%	418	10.68%	0.38	\$32.55	Moderate



<u>Summary</u>

- Comparing wages and salaries by market can be a tricky endeavor, as databases can vary greatly by how they estimate costs across markets. As a result, SSG leverages two different databases to estimate comparable wages and salaries. In our view, this gives a balanced approach that helps uncover whether markets are generally more or less expensive relative to one another.
 - EMSI: This source leverages actual wage estimates by SOC code, but because job and skill requirements can vary by market and requirement it is not an exact comparison. For example, "welders" in a market where most applicable jobs require less skill is classified the same as a market where "welders" tend to have higher skill requirements, but it may appear that the latter has higher wages overall.

- ERI: This source estimates the wage for the exact same job, skill requirement, and tenure across markets, but takes a more modeled approach so is less based on actual wage levels. We use example job titles under each cluster in the below to show those differences.
- As shown in the table below, Enid's overarching wage profile tends to fall towards the middle of all the candidate locations – the data showing more favorable compared to some larger markets like OKC, Tulsa, and Wichita, but less favorable than a few other locations. In SSG's project experience, the cost differentials between smaller and larger markets has been shrinking in recent years. While there may be some opportunity to pitch Enid's wage structure against other markets (especially those larger ones with more competition), this differential may not be that strong.

	All Production		Food Pro	oduction	Metal 8 Produ	k Plastic uction	Cher Produ	nical uction	Electi Produ	ronics uction	Mainte	enance	Logi	stics	Supple Lal	mental por	
MARKET	Median Cluster Wage (EMSI)	Machine Operator (ERI)	Median Cluster Salary (EMSI)	Food Process Worker (ERI)	Median Cluster Salary (EMSI)	CNC Operator (ERI)	Median Cluster Salary (EMSI)	Chemical Operator (ERI)	Median Cluster Salary (EMSI)	Electro- mech. Assembly (ERI)	Median Cluster Salary (EMSI)	Mntc. Mechanic (ERI)	Median Cluster Salary (EMSI)	Forklift Operator (ERI)	Median Cluster Salary (EMSI)	Fast Food Worker (ERI)	AVERAGE
Columbus (MS)	\$15.78	\$17.96	\$16.63	\$12.32	\$16.50	\$27.58	\$17.31	\$22.21	\$16.20	\$19.93	\$21.49	\$22.78	\$13.07	\$15.73	\$8.95	\$9.69	\$17.13
Ardmore	\$16.94	\$17.41	\$17.70	\$12.08	\$16.37	\$27.24	\$17.09	\$21.70	\$16.82	\$19.28	\$24.72	\$22.82	\$16.22	\$16.21	\$9.26	\$9.69	\$17.60
Nichita Falls (TX)	\$14.85	\$18.08	\$16.84	\$12.33	\$16.90	\$28.68	\$20.00	\$23.00	\$17.05	\$20.18	\$22.22	\$23.94	\$14.14	\$16.31	\$9.26	\$10.04	\$17.74
Muskogee	\$17.07	\$17.11	\$18.80	\$11.85	\$18.13	\$26.98	\$19.11	\$21.77	\$17.88	\$18.99	\$25.32	\$23.10	\$13.80	\$15.83	\$9.44	\$9.74	\$17.81
Enid	\$15.93	\$18.10	\$16.07	\$12.40	\$18.82	\$28.30	\$19.00	\$22.73	\$20.21	\$20.08	\$28.50	\$23.72	\$16.25	\$16.17	\$9.23	\$9.87	\$18.46
DKC (South)	\$16.62	\$18.28	\$18.24	\$12.87	\$18.08	\$28.26	\$19.49	\$22.69	\$18.15	\$20.27	\$26.67	\$24.24	\$15.30	\$16.99	\$9.57	\$10.31	\$18.50
Stillwater	\$17.32	\$18.12	\$19.93	\$12.33	\$18.67	\$28.28	\$20.63	\$22.83	\$18.70	\$20.13	\$26.38	\$23.91	\$14.59	\$16.29	\$9.38	\$9.86	\$18.58
Garden City (KS)	\$17.66	\$18.30	\$17.65	\$13.39	\$19.59	\$27.92	\$19.37	\$22.99	\$19.58	\$20.25	\$24.98	\$23.55	\$17.09	\$16.55	\$9.97	\$9.97	\$18.68
ſulsa (North)	\$18.31	\$19.89	\$19.75	\$13.58	\$18.81	\$31.45	\$19.86	\$25.18	\$18.72	\$22.12	\$25.32	\$25.87	\$14.99	\$17.78	\$9.60	\$10.56	\$19.49
Wichita (KS)	\$19.72	\$19.81	\$20.78	\$13.67	\$19.60	\$30.34	\$21.83	\$24.68	\$19.44	\$21.99	\$26.89	\$25.43	\$15.22	\$17.23	\$9.68	\$10.42	♦ \$19.80



Summary

- The summary below shows salary differences for the more white collar, or professional oriented occupational clusters analyzed herein. Again, we leverage the same data sources (with differing assumptions) to show which markets tend to have higher and lower salaries.
- Like on the wage side, Enid falls right in the middle of the candidate markets, with neither a major cost advantage or disadvantage for these example salary positions. Even more so than on the wage

side, SSG would not recommend trying to highlight any particular salary advantage compared to other markets. In fact, although the data shows a slight advantage compared to other markets, in SSG's experience, real salary differentials between large and small markets are oftentimes equal. And occasionally, companies need to pay a premium to attract professional talent to live and work in a smaller market.

	Engin	eering	Scie	ence	Healt	hcare	Finance &	Accounting		IT	
MARKET	Median Cluster Salary (EMSI)	Ex. Mfg. Engineer (ERI)	Median Cluster Salary (EMSI)	Ex. Biologist (ERI)	Median Cluster Salary (EMSI)	Ex. [RN] (ERI)	Median Cluster Salary (EMSI)	Ex. Financial Analyst (ERI)	Median Cluster Salary (EMSI)	Ex. IT Analyst (ERI)	AVERAGE
Ardmore	\$82,765	\$84,281	\$48,959	\$68,521	\$54,030	\$68,212	\$54,262	\$79,059	\$55,642	\$65,427	\$66,116
Stillwater	\$86,844	\$86,275	\$31,311	\$69,596	\$53,647	\$70,118	\$61,463	\$82,750	\$56,266	\$68,664	\$66,693
Columbus (MS)	\$84,975	\$86,529	\$51,541	\$69,482	\$50,672	\$68,399	\$64,111	\$82,231	\$59,633	\$67,689	\$68,526
Garden City (KS)	\$88,739	\$85,311	\$55,152	\$69,029	\$58,904	\$69,444	\$65,474	\$82,725	\$61,040	\$67,500	\$70,332
Enid	\$92,171	\$86,721	\$65,325	\$70,124	\$54,471	\$70,609	\$58,338	\$84,336	\$67,699	\$69,813	\$71,961
Muskogee	\$92,534	\$87,736	\$57,609	\$70,684	\$55,557	\$70,540	\$71,016	\$82,375	\$69,591	\$68,434	\$72,608
Wichita (KS)	\$92,809	\$90,367	\$55,634	\$73,389	\$54,883	\$72,235	\$68,405	\$88,051	\$66,360	\$72,536	\$73,467
Oklahoma City (South)	\$95,552	\$89,413	\$56,764	\$70,769	\$59,427	\$71,544	\$67,324	\$85,330	\$72,693	\$70,401	\$73,922
Wichita Falls (TX)	\$95,743	\$92,274	\$53,066	\$73,564	\$52,808	\$75,163	\$66,928	\$89,025	\$71,271	\$73,442	\$74,328
Tulsa (North)	\$92,935	\$96,267	\$62,959	\$77,118	\$57,353	\$77,574	\$73,812	\$92,779	\$70,211	\$77,599	\$77,861

SUPPLY: PRODUCTION – ALL



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Production – All Presence Summary

- The chart at left shows the absolute number of workers in the Production All cluster within the 40 minute drive time.
- This data looks at all production workers (all those classified under 51-000). The following pages will look at subsets of these production workers.
- There are about 2,600 total production workers in the 40 minutes surrounding Enid.

Production – All Concentration Summary

- The chart at left shows the concentration of workers in the Production All cluster within the 40 minute drive time.
- While the sheer number of production workers is relatively small compared to larger metro areas, the concentration of workers is well above the national average and in line with most of the comparison markets.

Production – All Growth Summary

- The chart at left shows five years of historic growth trends and five years of projected growth for the Production All cluster.
- The data show a dip in historic presence of these workers and very modest growth into the future, lagging most of the other markets.

DEMAND: PRODUCTION – ALL



Production – All Demand Summary

- The chart at right shows the relative demand for workers in the Production All cluster by comparing overall industry presence to job postings activity.
- Relative demand for production workers is comparatively low when benchmarked against the other markets. The data show much higher relative demand in markets like Tulsa, OKC, and Wichita.

Production – All Wages Summary

- The chart at right shows the growth in salaries for the Production

 All cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.
- Nominal wages have been moving up in most markets over the past decade. Enid has followed the same trend, but tends to lag the other markets.

Demand: Measure of hiring demand vs. occupational presence



Wage Growth: Nominal wage growth over the past 10 years



SUPPLY: PRODUCTION – FOOD



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Production – Food Presence Summary

- The chart at left shows the absolute number of workers in the Production Food cluster within the 40 minute drive time.
- There are more than 1,200 food production workers in the Enid region.

Production – Food Concentration Summary

- The chart at left shows the concentration of workers in the Production Food cluster within the 40 minute drive time.
- The concentration of food production workers in the Enid region is very strong, and more than two times the national average. The region only trails Garden City in terms of its concentration. This is driven in large part by the Tyson facility.

Production – Food Growth Summary

- The chart at left shows five years of historic growth trends and five years of projected growth for the Production Food cluster.
- Both historic and projected growth for this occupational cluster is relatively muted. That being said, SSG has seen a tremendous amount of activity in the food production industry over the past 12 months.

DEMAND: PRODUCTION – FOOD



Production – Food Demand Summary

- The chart at right shows the relative demand for workers in the Production – Food cluster by comparing overall industry presence to job postings activity.
- Relative demand for food production workers in Enid is low compared to the other markets.

Production – Food Wages Summary

- The chart at right shows the growth in salaries for the Production

 Food cluster over the past ten years. The emphasis here is on
 the change over time rather than on absolute wage/salary levels.
- The historic wage data shows that Enid has lagged those other comparison markets, although wages have risen more sharply in recent years.

Demand: Measure of hiring demand vs. occupational presence



Wage Growth: Nominal wage growth over the past 10 years



SUPPLY: PRODUCTION – METAL



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Production – Metal Presence Summary

- The chart at left shows the absolute number of workers in the Production Metal cluster within the 40 minute drive time.
- There are approximately 1,400 metal production workers employed in the Enid labor shed.
- Larger markets with a significant energy and related-industry presence (e.g. Tulsa) have a much larger sheer number of these types of workers.

Production – Metal Concentration Summary

- The chart at left shows the concentration of workers in the Production Metal cluster within the 40 minute drive time.
- Enid's concentration of these workers is again well above the national average.

Production – Metal Growth Summary

- The chart at left shows five years of historic growth trends and five years of projected growth for the Production Metal cluster.
- The historic data shows the cyclical impact that the energy industry can have on these types of positions, with many of these markets seeing a dip from 2014 to 2017. Enid's projected growth is expected to be relatively flat into the future.

DEMAND: PRODUCTION – METAL



Production – Metal Demand Summary

- The chart at right shows the relative demand for workers in the Production Metal cluster by comparing overall industry presence to job postings activity.
- Like the other production occupational clusters, the data show comparatively lower demand for these types of workers in Enid.

<u>Production – Metal Wages Summary</u>

- The chart at right shows the growth in salaries for the Production

 Metal cluster over the past ten years. The emphasis here is on
 the change over time rather than on absolute wage/salary levels.
- While the recent demand data shows more favorably, Enid's wage structure for these types of metal production positions has risen faster than in other markets over the past decade.



Demand: Measure of hiring demand vs. occupational presence

Wage Growth: Nominal wage growth over the past 10 years



SUPPLY: PRODUCTION – CHEMICAL



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Production – Chemical Presence Summary

- The chart at left shows the absolute number of workers in the Production Chemical cluster within the 40 minute drive time.
- There are about 700 chemical production workers in the Enid labor shed.

Production – Chemical Concentration Summary

- The chart at left shows the concentration of workers in the Production – Chemical cluster within the 40 minute drive time.
- While the absolute number of workers is relatively low, the concentration is once again well above the national average trailing only a couple of the comparison markets.

Production – Chemical Growth Summary

- The chart at left shows five years of historic growth trends and five years of projected growth for the Production – Chemical cluster.
- Historic growth has been flat for this occupational cluster, and projections indicate ongoing low growth.

DEMAND: PRODUCTION – CHEMICAL



Production – Chemical Demand Summary

- The chart at right shows the relative demand for workers in the Production Chemical cluster by comparing overall industry presence to job postings activity.
- While still at the bottom half of relative demand, there is slightly higher demand for these types of workers in Enid compared to the other production occupational categories.

Production – Chemical Wages Summary

- The chart at right shows the growth in salaries for the Production

 Chemical cluster over the past ten years. The emphasis here is
 on the change over time rather than on absolute wage/salary
 levels.
- Wages for chemical production workers in Enid has generally followed the same pattern as in other comparison markets.

Demand: Measure of hiring demand vs. occupational presence



Wage Growth: Nominal wage growth over the past 10 years



SUPPLY: PRODUCTION – ELECTRONICS



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Production – Electronics Presence Summary

- The chart at left shows the absolute number of workers in the Production Electronics cluster within the 40 minute drive time.
- The data show just over 1,400 workers employed in various electrical/electronic production occupations in the region.

Production – Electronics Concentration Summary

- The chart at left shows the concentration of workers in the Production – Electronics cluster within the 40 minute drive time.
- Once again like the other production categories, Enid has a very strong concentration of these types of workers.

Production – Electronics Growth Summary

- The chart at left shows five years of historic growth trends and five years of projected growth for the Production Electronics cluster.
- Like the metal working occupational cluster, the data here shows a similar historic dip in employment for these types of workers, indicating impacts from the energy industry.

DEMAND: PRODUCTION – ELECTRONICS

Production – Electronics Demand Summary

- The chart at right shows the relative demand for workers in the Production – Electronics cluster by comparing overall industry presence to job postings activity.
- Relative demand for electrical-focused production workers is much lower in Enid compared to the other markets.

Production – Electronics Wages Summary

- The chart at right shows the growth in salaries for the Production

 Electronics cluster over the past ten years. The emphasis here
 is on the change over time rather than on absolute wage/salary
 levels.
- While the relative job posting demand is favorable, the historic wage growth data shows more sharply rising wages for this occupational cluster in Enid compared to the other markets.

Demand: Measure of hiring demand vs. occupational presence



Wage Growth: Nominal wage growth over the past 10 years



SUPPLY: MAINTENANCE



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Maintenance Presence Summary

- The chart at left shows the absolute number of workers in the Maintenance cluster within the 40 minute drive time.
- In SSG's corporate experience, while most operations typically hire far fewer maintenance than production workers, these positions can be very hard to fill.
- There are just shy of 700 maintenance and related workers in the Enid region.

Maintenance Concentration Summary

- The chart at left shows the concentration of workers in the Maintenance cluster within the 40 minute drive time.
- Enid has an exceptionally strong concentration of these types of workers at nearly two times the national average and exceeding the level in nearly all other markets.

Maintenance Growth Summary

- The chart at left shows five years of historic growth trends and five years of projected growth for the Maintenance cluster.
- The historic data show some fluctuations in presence of these types of workers, and moderate growth projected into the future.

DEMAND: MAINTENANCE



Maintenance Demand Summary

- The chart at right shows the relative demand for workers in the Maintenance cluster by comparing overall industry presence to job postings activity.
- Relative demand for these workers in Enid is higher compared to the other production-oriented occupational clusters.

Maintenance Wages Summary

- The chart at right shows the growth in salaries for the Maintenance cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.
- While SSG believes this sharp spike in wages over the past few years is driven in part by data irregularities, it could also point to further demand for these types of workers.

Demand: Measure of hiring demand vs. occupational presence



Wage Growth: Nominal wage growth over the past 10 years



SUPPLY: ENGINEERING



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Engineering Presence Summary

- The chart at left shows the absolute number of workers in the Engineering cluster within the 40 minute drive time.
- The data show a low 161 engineers in the Enid region with focus on industrial requirements (e.g. electrical, industrial, but <u>not</u> civil, etc.)

Engineering Concentration Summary

- The chart at left shows the concentration of workers in the Engineering cluster within the 40 minute drive time.
- Enid has a low concentration of these types of engineers, well below the national average and well below many of the comparison markets.

Engineering Growth Summary

- The chart at left shows five years of historic growth trends and five years of projected growth for the Engineering cluster.
- The data show a very sharp drop in engineering employment from 2015 to 2017 this could be due to a large layoff but also a reclassification of key occupational codes.

DEMAND: ENGINEERING



Engineering Demand Summary

- The chart at right shows the relative demand for workers in the Engineering cluster by comparing overall industry presence to job postings activity.
- Relative demand for these types of engineers in Enid generally follows the same pattern as in other markets. Of interest, a market like Columbus, MS, is experiencing extremely high demand for engineers, due in part to a large automotive presence there.



Demand: Measure of hiring demand vs. occupational presence

Wage Growth: Nominal wage growth over the past 10 years



Engineering Wages Summary

- The chart at right shows the growth in salaries for the Engineering cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.
- Salary levels for engineers in Enid have generally risen similarly to other markets, although the most recent year of data shows a bit of a spike.
SUPPLY: SCIENCE

Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Science Presence Summary

- The chart at left shows the absolute number of workers in the Science cluster within the 40 minute drive time.
- There are a very low number of science-focused workers in the region. This includes occupations like chemists, biological technicians, and other "pure" science occupations.

Science Concentration Summary

- The chart at left shows the concentration of workers in the Science cluster within the 40 minute drive time.
- The concentration of these types of workers is also relatively low in Enid, as it is in several other markets. The concentration data for Stillwater (with OSU) is considerably higher.

Science Growth Summary

- The chart at left shows five years of historic growth trends and five years of projected growth for the Science cluster.
- The historic growth data shows a severe drop in these types of workers up to 2017, likely the result of a large layoff and/or reclassification of some occupational clusters. Future growth is projected to be flat.

DEMAND: SCIENCE

Science Demand Summary

- The chart at right shows the relative demand for workers in the Science cluster by comparing overall industry presence to job postings activity.
- Relative demand for science-focused workers in Enid is relatively low.

Science Wages Summary

- The chart at right shows the growth in salaries for the Science cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.
- As the chart at right shows, historic wage/salary data for these types of occupations is much choppier than some of the other occupational clusters. As a result, drawing strong conclusions from this data (especially for such a small occupational cluster) may not be warranted.

180% 160% 140% 120% 100% 80% 60% 40% 20% 0% 0% 100 100% 100

Wage Growth: Nominal wage growth over the past 10 years



SUPPLY: LOGISTICS



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Logistics Presence Summary

- The chart at left shows the absolute number of workers in the Logistics cluster within the 40 minute drive time.
- There are approximately 2,000 logistics-oriented workers in the Enid region which includes occupations like forklift drivers, picker/packers, truck drivers, and similar.

Logistics Concentration Summary

- The chart at left shows the concentration of workers in the Logistics cluster within the 40 minute drive time.
- There is a slightly higher concentration of these types of workers compared to the national average and other comparison markets. A market like Ardmore with a few very large distribution operations in the region has a much higher concentration, for example.

Logistics Growth Summary

- The chart at left shows five years of historic growth trends and five years of projected growth for the Logistics cluster.
- Logistics-occupational growth in Enid has been relatively low historically, and is projected to be flat moving forward.
- That being said, SSG believes this can actually be an advantage for recruiting, retaining, and expanding production operations in that they may not need to compete with the influx of big box distribution operations in other larger markets.

DEMAND: LOGISTICS

Logistics Demand Summary

- The chart at right shows the relative demand for workers in the Logistics cluster by comparing overall industry presence to job postings activity.
- Relative demand for logistics workers in Enid is slightly elevated compared to the other markets.

Logistics Wages Summary

- The chart at right shows the growth in salaries for the Logistics cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.
- Interestingly, the historic wage growth data shows steeper growth in wages for this occupational cluster compared to other markets.



Demand: Measure of hiring demand vs. occupational presence

Wage Growth: Nominal wage growth over the past 10 years



SUPPLY: HEALTHCARE



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Healthcare Presence Summary

- The chart at left shows the absolute number of workers in the Healthcare cluster within the 40 minute drive time.
- The data shows approximately 1,500 direct healthcare workers in the Enid region. This focuses on the more highly skilled workers under SOC code 29-0000, and does <u>not</u> include more of the lower and moderately skilled workers under 31-000 - Healthcare Support occupations (e.g. home health aids, nursing assistants, OT/PT aides, etc.).

Healthcare Concentration Summary

- The chart at left shows the concentration of workers in the Healthcare cluster within the 40 minute drive time.
- Enid has a slightly lower concentration of these workers compared to the national average, but is generally aligned with levels in other comparison markets. This is an occupational cluster that tends to be present in most markets, so the variability of concentration levels tends to be more muted.

Healthcare Growth Summary

- The chart at left shows five years of historic growth trends and five years of projected growth for the Healthcare cluster.
- While the historic data shows a slight increase in these occupations from 2014 to 2016, recent and projected data show flat growth.

DEMAND: HEALTHCARE



Healthcare Demand Summary

- The chart at right shows the relative demand for workers in the Healthcare cluster by comparing overall industry presence to job postings activity.
- Relative demand for healthcare workers in the Enid region is very high, exceeding levels in all other comparison markets.

Healthcare Wages Summary

- The chart at right shows the growth in salaries for the Healthcare cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.
- Wage growth in Enid has generally followed that in other comparison markets, with a data "blip" from 2017.





Demand: Measure of hiring demand vs. occupational presence

SUPPLY: FINANCE & ACCOUNTING



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Finance & Accounting Presence Summary

- The chart at left shows the absolute number of workers in the Finance & Accounting cluster within the 40 minute drive time.
- There are just shy of 400 finance, accounting, and related workers in the Enid region.

Finance & Accounting Concentration Summary

- The chart at left shows the concentration of workers in the Finance & Accounting cluster within the 40 minute drive time.
- While none of the comparison markets have a strong concentration of these types of workers, Enid's concentration is just half of the national average.

Finance & Accounting Growth Summary

- The chart at left shows five years of historic growth trends and five years of projected growth for the Finance & Accounting cluster.
- Like in some of the other clusters, the historic data shows a big dip in employment bottoming out in 2017. Projected growth is forecasted to be positive.

DEMAND: FINANCE & ACCOUNTING



Finance & Accounting Demand Summary

- The chart at right shows the relative demand for workers in the Finance & Accounting cluster by comparing overall industry presence to job postings activity.
- Relative demand for these types of finance and accounting workers is moderate in Enid compared to the other markets.



Demand: Measure of hiring demand vs. occupational presence

Wage Growth: Nominal wage growth over the past 10 years



Finance & Accounting Wages Summary

- The chart at right shows the growth in salaries for the Finance & Accounting cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.
- Wage and salary growth trends follows those in the other comparison markets.

SUPPLY: INFORMATION TECHNOLOGY



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Information Technology Presence Summary

- The chart at left shows the absolute number of workers in the Information Technology cluster within the 40 minute drive time.
- There are 377 IT workers in the Enid region.

Information Technology Concentration Summary

- The chart at left shows the concentration of workers in the Information Technology cluster within the 40 minute drive time.
- Even more so than the finance and accounting cluster, none of the comparison markets have an especially strong concentration of these types of workers. But the concentration of IT workers in the Enid region is very low.

Information Technology Growth Summary

- The chart at left shows five years of historic growth trends and five years of projected growth for the Information Technology cluster.
- The data shows that consistent historic dip, with more favorable growth forecasted into the future.

DEMAND: INFORMATION TECHNOLOGY



Information Technology Demand Summary

- The chart at right shows the relative demand for workers in the Healthcare cluster by comparing overall industry presence to job postings activity.
- Relative demand for IT workers is moderate in Enid compared to other comparison markets.
- Because this is a relative scale, we tend not to focus on the unit of measurement here. But one can see the level of relative demand (e.g. job postings divided by occupational presence) is extremely high in all markets for IT workers.

Information Technology Wages Summary

- The chart at right shows the growth in salaries for the Healthcare cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.
- The data show a ramp up in nominal wages from 2014 to 2016 in Enid before flattening out in recent years.

Demand: Measure of hiring demand vs. occupational presence

Wage Growth: Nominal wage growth over the past 10 years



SUPPLY: SUPPLEMENTAL LABOR



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Supplemental Labor Presence Summary

- The chart at left shows the absolute number of workers in the Supplemental Labor cluster within the 40 minute drive time.
- Finally, we look at "supplemental" workers those employed in occupations like retail, food service, and similar lower-wage occupations that with training and support, could work in higher skill occupations in production, health care, or business. There are about 3,200 of these workers in Enid.

Supplemental Labor Concentration Summary

- The chart at left shows the concentration of workers in the Supplemental Labor cluster within the 40 minute drive time.
- Most communities tend to have similar concentrations of these workers, because every market tends to have retail, restaurants, and food service. Enid's concentration is just a little bit below that in other markets.

Supplemental Labor Growth Summary

- The chart at left shows five years of historic growth trends and five years of projected growth for the Supplemental Labor cluster.
- Historic data shows another significant dip in employment from 2015 to the present, with flat growth projected into the future.

DEMAND: SUPPLEMENTAL LABOR



Supplemental Labor Demand Summary

- The chart at right shows the relative demand for workers in the Supplemental Labor cluster by comparing overall industry presence to job postings activity.
- Relative demand for these types of supplemental workers is slightly elevated in Enid compared to the other markets.
 Oftentimes, SSG sees this in smaller markets compared to larger ones.

Supplemental Labor Wages Summary

- The chart at right shows the growth in salaries for the Supplemental Labor cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.
- Wage levels for this type of work tend to be pretty consistent across markets, and the chart at right shows just that.

Demand: Measure of hiring demand vs. occupational presence



Wage Growth: Nominal wage growth over the past 10 years



WORKFORCE TRAINING

SUMMARY OF QUANTITATIVE TRAINING ANALYSIS



Category	Description	Key <u>Enid</u> Strengths	Key <u>Enid</u> Challenges
Production & Maintenance	Completions & programs in precision production, maintenance and related	 Completion data shows target programs at Autry in Welding, CAD/Drafting, and Industrial Electronics, among other programs. Number of tangentially related programs like HVAC, automotive, and others that can potentially transition to industrial applications. 	? Relatively small number of production related completions compared to other markets – to be expected for a more rural geography.
Engineering	Completions & programs in engineering, engineering technologies and related	 Broader one hour radius pulls in all the engineering completions from OSU – proximity to a huge research & engineering university is critically important for manufacturing. Workforce profile data shows large share of engineers in region from OSU. NOC data also shows a good number of students completing associate's degrees in engineering. 	? Clearly, it would be helpful if NWOSU had an engineering program bursting at the seems with enrollment, but that's not realistic nor necessary. Proximity to a major school like OSU is a huge advantage for a rural community like Enid.
Health Care	Completions & programs in health care disciplines	 Autry has a lot of target programs in health care disciplines and a lot of completions. Moderate growth in completions from Autry, as well, in recent years. Large number of NOC graduates in nursing related fields, as well. 	Pased on the completion data, SSG sees no major weaknesses here, especially with large number of programs and completions from Autry.
Science	Completions & programs in "pure" science like chemistry, biology, and related technician programs	 Growing number of completions in the region, driven in part by OSU but also a lot of associate's level completions at NOC, along with additional biology and chemistry grads from NWOSU. 	? Like healthcare, the science completion data for the region and individual institutions looks pretty good (especially for a rural region).
Business	Completions & programs in business and related	 Significant number of business, specifically agribusiness completions from NWOSU. 	 Completion data for the broader region has fallen in recent years. Moderate number of completions and programs at Autry, mainly focused on design/graphics which is tangentially related to business applications.
ІТ	Completions & programs in information technology and related	 Increasing number of completions in the broader region, with a handful of associate's degree completions from NOC and bachelor's from NWOSU. 	 ? Very small number of related IT completions from Autry. ? Nearly every community (big and small) struggles with getting enough people trained in IT disciplines (whether at the non-award level, diploma/certificates, or full degrees).

Precision Production Completions: Most Recent Year (2018)



Precision Production Completions: Last 10 Years



Precision Production Completions Summary

- The figures above show all precision production completions within a broader 60 minute drive time of each site. This includes completions in areas like machining, welding, and similar.
- There are a relatively small number of these types of completions in the Enid region with some welding completions coming out of Autry. The very large number of completions in markets like Tulsa are driven by larger institutions like Tulsa Tech but also for-profit institutions like Tulsa Welding School.



Maintenance Completions: Most Recent Year (2018)

Maintenance Completions: Last 10 Years



Maintenance Completions Summary

- The figures above show all maintenance completions within a broader 60 minute drive time of each site. This includes programs like industrial maintenance, electric, and HVAC.
- Again, most of the completions seen here are driven in part by completions coming out of Autry in HVAC, and other related programs.

ENGINEERING & ENG. TECHNICIAN COMPLETIONS

Engineering <u>Degree</u> Completions: Most Recent Year (2018)



Engineering Degree Completions: Last 10 Years



Engineering Degree Completions Summary

- The figures above show engineering <u>degree</u> completions within a broader 60 minute drive time of Enid.
- The engineering completion data shows really well for Enid, because it's picking up those engineering completions from Stillwater/OSU. It's also impacted by the associate degree completions from Northern Oklahoma College (see detailed table).



Engineering Technician Completions: Most Recent Year (2018)

Engineering Technician Completions: Last 10 Years



Engineering Technician Completions Summary

- The figures above show all engineering <u>technician</u> completions within a broader 60 minute drive time of each site.
- The data for engineering technicians does not show as favorably, with some local completions coming from Autry, Northern Oklahoma College, and other regional institutions. A market like Wichita shows a very large number of completions due to heavy emphasis on aerospace programs there.

HEALTH CARE & SCIENCE



Healthcare Completions: Most Recent Year (2018)



Healthcare Completions: Last 10 Years



Healthcare Completions Summary

- The figures above show all healthcare completions within a broader 60 minute drive time of Enid.
- The broader Enid region has relatively large number of healthcare completions, trailing just below Oklahoma City, for example. The growth trend has been relatively flat over the past decade.

Science <u>Degree</u> Completions: Most Recent Year (2018)



Science <u>Degree</u> Completions: Last 10 Years



Science Degree Completions Summary

- The figures above show all science <u>degree</u> completions within a broader 60 minute drive time of Enid.
- The broader region also boasts a relatively large number of science-focused degrees. This is in part due to Oklahoma State being just within that one hour radius, so those numbers are included. However, the data also include a sizable number of completions from Northern Oklahoma College and NW Oklahoma State University.

BUSINESS & IT



Business Degree Completions: Most Recent Year (2018)



Business Degree Completions: Last 10 Years



Business Degree Completions Summary

- The figures above show all business <u>degree</u> completions within a broader 60 minute drive time of Enid.
- The region saw just shy of 600 business completions in the last year of data reported (2018). Like in other categories, this boarder drive time pulls in completions from nearby Oklahoma State in Stillwater. The number of these completions in nearly all markets has fallen over the past decade.



IT <u>Degree</u> Completions: Most Recent Year (2018)

IT <u>Degree</u> Completions: Last 10 Years



IT Degree Completions Summary

- The figures above show all IT <u>degree</u> completions within a broader 60 minute drive time of Enid.
- No market has a large number of these types of high demand IT completions, and Enid's total falls right in the middle. However, the number of awarded degrees in the region has risen over the past several years.

AUTRY TECHNOLOGY CENTER: DETAILED COMPLETIONS

Autry Completions Summary

- The table at right shows detailed completions data for the past five years from Autry Technology Center. SSG has classified programs into broad categories like Business, Health, and others. All of these are certificates and/or diploma programs (i.e. not degrees).
- The data show a large (and increasing) number of completions in health related disciplines.
- There's also a relatively large (and generally steady) number of industrial-related completions. SSG includes programs like HVAC and automotive repair because those mechanical skills can oftentimes be transferred or set the base for work in industries like manufacturing.

CIP Code	Cluster	Description	2014	2015	2016	2017	2018	5 Year Total
10.0301	Business	Graphic Communications, General	9	15	15	0	0	39
52.0302	Business	Accounting Technology/Technician and Bookkeeping	6	9	8	5	5	33
50.0401	Business	Design and Visual Communications, General	0	0	0	8	20	28
52.0401	Business	Administrative Assistant and Secretarial Science, General	7	0	2	0	0	9
52.0402	Business	Executive Assistant/Executive Secretary	0	2	0	1	2	5
		Business Total	22	26	25	14	27	114
51.0801	Health	Medical/Clinical Assistant	27	31	32	33	23	146
51.0601	Health	Dental Assisting/Assistant	12	29	22	32	25	120
51.3901	Health	Licensed Practical/Vocational Nurse Training	16	21	13	27	14	91
51.0812	Health	Respiratory Therapy Technician/Assistant	9	8	8	10	8	43
51.0911	Health	Radiologic Technology/Science - Radiographer	7	8	7	7	6	35
51.0710	Health	Medical Office Assistant/Specialist	8	8	7	4	2	29
51.0909	Health	Surgical Technology/Technologist	7	4	7	5	6	29
51.3902	Health	Nursing Assistant/Aide and Patient Care Assistant/Aide	0	0	0	0	33	33
51 0920	Health	Magnetic Resonance Imaging (MRI)	0	0	0	0	2	2
51.0520	incutti	Technology/Technician		0			۲	
		Health Total	86	109	96	118	119	528
48.0508	Industrial	Welding Technology/Welder	13	18	16	5	17	69
47.0201	Industrial	Heating, Air Conditioning, Ventilation and Refrigeration Maintenance Technology/Technician	9	11	10	11	14	55
15.1302	Industrial	CAD/CADD Drafting and/or Design Technology/Technician	8	9	16	9	7	49
47.0604	Industrial	Automobile/Automotive Mechanics	7	6	8	3	14	38
47.0105	Industrial	Industrial Electronics Technology/Technician	11	8	3	3	5	30
47.0603	Industrial	Autobody/Collision and Repair Technology/Technician	2	8	9	8	6	33
46.0201	Industrial	Carpentry/Carpenter	9	6	7	7	3	32
47.0606	Industrial	Small Engine Mechanics and Repair Technology/Technician	0	0	0	9	12	21
47.0000	Industrial	Mechanics and Repairers. General	2	10	5	0	0	17
		Industrial Total	61	76	74	55	78	344
11.0901	IT	Computer Systems Networking and Telecommunications	0	0	4	5	2	11
		IT Total	0	0	4	5	2	11
12.0401	Other	Cosmetology/Cosmetologist, General	6	9	13	13	15	56
19.0709	Other	Child Care Provider/Assistant	9	11	6	3	0	29
12.0500	Other	Cooking and Related Culinary Arts, General	3	6	9	5	6	29
12.0410	Other	Nail Technician/Specialist and Manicurist	9	0	0	0	0	9
13.1210	Other	Early Childhood Education and Teaching	0	0	0	0	14	14
		Other Total	27	26	28	21	35	137

NORTHERN OKLAHOMA COLLEGE: DETAILED COMPLETIONS

NOC Completions Summary

- The table at right shows detailed completions data for the past five years from Northern Oklahoma College.
 SSG has classified programs into broad categories like Business, Health, and others. All of these completions are associate's degrees.
- Like Autry at the certificate and diploma level, the data shows a very large number of completions in healthcare related disciplines.
- There's also a large number of engineering and science-related completions, as well. The engineering completions is a particularly interesting opportunity to bring NOC graduates who go on to complete bachelor's and similar degrees at other institutions back to Enid in the mid- and long-term.

CIP Code	Cluster	Description	2014	2015	2016	2017	2018	5 Year Total
52.0401	Business	Administrative Assistant and Secretarial Science, General	8	4	3	6	8	29
10.0301	Business	Graphic Communications, General	3	0	0	0	0	3
		Business Total	11	4	3	6	8	32
51.3801	Health	Registered Nursing/Registered Nurse	111	105	129	0	0	345
51.0000	Health	Health Services/Allied Health/Health Sciences, General	19	17	20	28	32	116
51.0907	Health	Medical Radiologic Technology/Science - Radiation Therapist	12	12	23	17	0	64
51.1102	Health	Pre-Medicine/Pre-Medical Studies	32	0	0	0	0	32
51.0908	Health	Respiratory Care Therapy/Therapist	7	7	6	9	0	29
51.0909	Health	Surgical Technology/Technologist	2	6	1	3	3	15
		Health Total	183	147	179	57	35	601
15.9999	Industrial	Engineering Technologies and Engineering-Related Fields, Other	19	32	27	25	28	131
14.0101	Industrial	Engineering, General	17	0	0	0	0	17
14.9999	Industrial	Engineering, Other	3	0	0	0	0	3
15.0805	Industrial	Mechanical Engineering/Mechanical Technology/Technician	2	0	0	0	0	2
		Industrial Total	41	32	27	25	28	153
11.0103	IT	Information Technology	14	11	9	15	8	57
11.0101	IT	Computer and Information Sciences, General	3	6	7	8	7	31
		IT Total	17	17	16	23	15	88
40.0101	Science	Physical Sciences	5	28	11	38	32	114
01.9999	Science	Agriculture, Agriculture Operations, and Related Sciences, Other	17	22	22	20	24	105
26.0101	Science	Biology/Biological Sciences, General	10	13	22	23	17	85
40.0501	Science	Chemistry, General	4	0	0	0	0	4
		Science Total	36	63	55	81	73	308
13.1202	Other	Elementary Education and Teaching	48	35	40	38	33	194
45.0101	Other	Social Sciences, General	82	78	0	0	0	160
13.1307	Other	Health Teacher Education	0	0	31	31	26	88
31.0501	Other	Health and Physical Education/Fitness, General	31	32	0	0	0	63
50.0102	Other	Digital Arts	12	8	13	12	10	55
19.0706	Other	Child Development	26	21	0	0	0	47
43.0103	Other	Criminal Justice/Law Enforcement Administration	17	25	0	0	0	42
29.0399	Other	Military Applied Sciences, Other	4	4	9	9	11	37
50.0501	Other	Drama and Dramatics/Theatre Arts, General	11	14	0	0	0	25
50.0901	Other	Music, General	3	4	3	6	6	22
50.0799	Other	Fine Arts and Art Studies, Other	8	6	4	1	1	20
23.0101	Other	English Language and Literature, General	8	12	0	0	0	20
13.1205	Other	Secondary Education and Teaching	3	0	0	0	0	3
50.0605	Other	Photography	1	0	0	0	0	1
		Other Total	254	239	100	97	87	777

NW OSU Completions Summary

- The table at right shows detailed completions data for the past five years from Northwestern Oklahoma State University. SSG has classified programs into broad categories like Business, Health, and others.
- There are fewer programs that have direct applicability to primary industry in the Enid region compared to Autry and NOC.
- However, Business and Science programs are certainly of interest to industrial focused operations. And the small, but steady number of completions in IT is important as well.

CIP Code	Cluster	Description	2014	2015	2016	2017	2018	5 Year Total
01.0102	Business	Agribusiness/Agricultural Business Operations	18	2	24	26	32	102
		Business Total	18	2	24	26	32	102
11.0101	IT	Computer and Information Sciences, General	5	10	17	9	16	57
		IT Total	5	10	17	9	16	57
26.0101	Science	Biology/Biological Sciences, General	23	18	11	24	21	97
40.0501	Science	Chemistry, General	3	5	4	11	5	28
01.0000	Science	Agriculture, General	1	20	0	0	0	21
27.9999	Science	Mathematics and Statistics, Other	0	3	2	2	3	10
		Science Total	27	46	17	37	29	156
31.9999	Other	Parks, Recreation, Leisure, and Fitness Studies, Other	29	35	25	48	25	162
42.0101	Other	Psychology, General	27	32	32	22	33	146
24.0102	Other	General Studies	10	16	20	23	19	88
13.1202	Other	Elementary Education and Teaching	16	17	19	14	13	79
43.0107	Other	Criminal Justice/Police Science	22	10	15	10	14	71
13.1210	Other	Early Childhood Education and Teaching	8	10	16	15	8	57
09.9999	Other	Communication, Journalism, and Related Programs, Other	13	8	5	16	9	51
44.0701	Other	Social Work	11	10	4	9	8	42
23.0101	Other	English Language and Literature, General	2	3	4	7	3	19
13.1101	Other	Counselor Education/School Counseling and Guidance Services	5	0	4	6	4	19
13.1314	Other	Physical Education Teaching and Coaching	7	3	3	2	1	16
13.1301	Other	Agricultural Teacher Education	6	3	1	5	1	16
54.0101	Other	History, General	4	0	5	5	2	16
05.0102	Other	American/United States Studies/Civilization	0	1	7	2	5	15
45.1001	Other	Political Science and Government, General	3	1	2	4	4	14
13.1011	Other	Education/Teaching of Individuals with Specific Learning Disabilities	5	5	0	1	2	13
13.1305	Other	English/Language Arts Teacher Education	3	2	1	4	3	13
13.1318	Other	Social Studies Teacher Education	2	3	4	1	0	10
23.1304	Other	Rhetoric and Composition	2	3	2	1	2	10
13.1312	Other	Music Teacher Education	2	0	3	3	0	8
45.1101	Other	Sociology	1	3	1	0	1	6
50.0901	Other	Music, General	0	0	3	2	1	6
13.1311	Other	Mathematics Teacher Education	0	1	2	0	2	5
30.9999	Other	Multi-/Interdisciplinary Studies, Other	2	0	2	1	0	5
13.1315	Other	Reading Teacher Education	0	1	0	1	1	3
13.1316	Other	Science Teacher Education/General Science Teacher Education	0	0	0	1	1	2
		Other Total	180	167	180	203	162	892

Summary

- In addition to understanding completions data for local and regional institutions, SSG always examines profiles of the incumbent workforce to understand where workers in key occupational clusters receive their training. For example, if a community does not have a four-year institution, but a large share of its engineering workforce went to a large R1 university just an hour or so away, current and future employers could expect to recruit workers from those institutions. It's an imperfect measure, but it does help identify key recruitment trends.
- The tables below shows the percentage of workers in Enid with online profiles (e.g. LinkedIn) associated with certain universities. We focus this analysis on workers reporting a bachelor's degree

and breakout broad STEM occupations and management and business occupations.

- The data show that the most common institution across all bachelor's and above profiles is Oklahoma State University in Stillwater. That share of the workforce is even higher when looking at critical skill sets for primary industry recruitment, retention and growth in STEM programs and management and business.
- Along with marketing and highlighting the presence and programs of local institutions of higher education, this data shows just how important it is to also market and leverage the story that Oklahoma State is just an hour down the road, where a large proportion of professional-level talent is likely to graduate from.

All Workers with Bachelors & Above

School	Percent of Profiles
Oklahoma State University-Stillwater	20.9%
Northwestern Oklahoma State University	18.5%
Northern Oklahoma College	8.5%
University of Oklahoma	8.0%
University of Central Oklahoma	5.2%
Southwestern Oklahoma State University	5.1%
Phillips University	4.7%
United States Air Force Academy	2.5%
University of Phoenix	2.0%
Autry Technology Center	1.9%
Community College of the Air Force	1.9%

Engineering, Science, IT

School	Percent of Profiles
Oklahoma State University-Stillwater	24.1%
Northwestern Oklahoma State University	16.0%
Northern Oklahoma College	8.9%
University of Central Oklahoma	4.6%
Southwestern Oklahoma State University	4.2%
University of Oklahoma	3.8%
University of Phoenix	3.8%
Autry Technology Center	3.4%
Community College of the Air Force	3.4%
Embry-Riddle Aeronautical University	2.1%
Ashford University	1.3%

Management & Business

School	Percent of Profiles
Oklahoma State University-Stillwater	25.1%
Northwestern Oklahoma State University	18.5%
University of Oklahoma	8.1%
Northern Oklahoma College	7.7%
Phillips University	6.3%
University of Central Oklahoma	5.8%
Southwestern Oklahoma State University	4.8%
University of Phoenix	2.1%
Autry Technology Center	1.5%
Oklahoma City University	1.5%
Community College of the Air Force	1.3%

STAKEHOLDER INTERVIEWS

STAKEHOLDER INTERVIEWS: APPROACH & SUMMARY



As we noted at the beginning, this analysis is meant to replicate many of the same types of analyses SSG would use if we were evaluating Enid on behalf of a corporate client. Not only is that true in our data analyses, but also our qualitative approach, namely conducting interviews with key workforce-related stakeholders in the community.

In SSG's view, nothing is more important in a site selection exercise than having candid conversations with existing employers in a market on what it's really like to hire and retain workers in the community, and further, what it's really like to live in the community. SSG has seen many times where favorable (but still honest) employer conversation can sway a project even when the data isn't as favorable. On the contrary, we've also seen where less favorable employer interviews can eliminate a site or community.

Second to employer interviews is meeting and speaking with all levels of education and workforce training. In SSG's experience, more and more companies (and especially those who are taking a long-term view) are taking a hard look at whether the local education and workforce training ecosystem can support their needs. Most communities do a good job on explaining and marketing to prospects available programs and services offered, but in SSG's view, there are some communities who pitch their offerings more effectively than others. Part of that is just a sense of, "know it when you see it". But more than that, the most successful workforce training pitches come not from education and training partners, but from the companies themselves. When that story is consistent from both training providers and employers, SSG and clients know that this can be a community that truly "gets it"

So for this engagement, we replicate those same types of conversations, speaking with three employers in Enid along with representatives of all levels of education: K-12, CareerTech, and higher education. Theses conversations generally cover the same areas including workforce availability, key strengths and weaknesses of the regional workforce, training and education opportunities, and overall view of the community and quality of life. But at the same time, they are meant to be open-ended in order to discuss key topics of interest as they arise.

The following summarizes the key highlights from the interviews, with more details on the next page:

- Extremely Positive View of Workforce Training, Especially Autry: As referred to at left, this appears to be a community that "gets it" as it relates to workforce training. SSG was very pleased to hear the strong, positive view of Autry especially, but of all education partners in the community. In SSG's view, this is one of the better communities we've visited/researched in recent times as it relates to storytelling and engagement between training and employers.
- <u>Typical Strengths and Weaknesses for Workforce Availability</u>: There were no big surprises as it related to employers' views of workforce availability in a more rural area. Employers reported general satisfaction with the quality and availability of workers, but highly skilled/training/specialized workers are simply tougher to find in a more rural community.
- Positive Trajectory on Quality of Place: Many interviewees noted the typical advantages and disadvantages of life in a more rural setting (e.g. less traffic vs. fewer places to shop). But several did note a sort of positive trajectory or momentum about the community in terms of both physical investments (e.g. Stride Center, new retail, etc.) but also being more progressive as a community.



The following summarizes results from the stakeholder interviews.

Commuting & Demographics

Interviewed employers reported that the vast majority of their employees tend to come from Enid proper. They reported some employees that do commute further from longer distances, but they tend to be in the minority. This feedback supports the commuting data shown previously herein.

From a demographics perspective, one employer noted significant concerns with an aging workforce nearing retirement age. In SSG's experience, this concern is common and certainly not a severe indictment of the community's underlying demographics.

Occupational Presence

Overall, employers did not note any unusual concerns with hiring and retaining the talent they needed above and beyond what SSG typically hears in these types of conversations. Overall, employers reported that entry-level, lower-wage workers were available in the market. On the blue collar side, however, employers reported that this is still a market driven heavily by oil and gas; when those industries are booming, it can be very tough to hire and retain workers.

However, employers did not that hiring specialized talent (e.g. whether a skilled mechatronics worker, engineer, or specialized health care worker) was a challenge because the supply of applicants in a more rural area is just fundamentally more challenging.

Workforce Training

One thing that certainly did stand out in SSG's view, was the significant and consistent positive praise for workforce training in the community, especially from Autry. As one said, "we are very blessed to have them." Another said that they are "not afraid to customize" their training and work very closely with employers to ensure training is targeted to their needs. That employer also said they partner with Autry for training across their entire operation – from entry to executive level. As another summarized: "I was surprised to come to Enid, OK, and see a facility of that caliber."

Our conversation with Autry pointed to many of those same positive attributes – a willingness to customize training to employer needs, and to find creative ways to provide training not just to result in a completion, but rather to yield a productive employee from day one. In SSG's view, this is exactly the type of consistent responses from both employers and the training institution that we and clients love to hear.

Employers and training stakeholders alike also pointed to strong engagement and collaboration across all levels of education from K-12 to higher ed in the community. The community more than "checks the box" on the types of offerings and engagement offered by these partners, from classic concurrent enrollment programs to articulation agreements, to work-based learning opportunities via extensive internship programs. SSG was particularly interested to learn about the city of Enid's endowment of faculty positions at NW Oklahoma State – this type of investment can send the signal to potential employers that the community is making investments in long-term education needs (and associated quality of life) in the community.

Community & Quality of Place

In addition to direct commentary about workforce, these types of conversations are always enlightening on folks' views of the quality of place in the community. It comes as no surprise that nearly all stakeholders (employers and training alike), spoke about the traditional advantages of small-town living – no traffic, safety, and a "great place to raise a family." The expected downsides of life in Enid were also highlighted, namely limited access to shopping, restaurants, and entertainment. But that was oftentimes followed by a comment that the city is taking steps to address those challenges as much as possible.

A few very unique comments stood out in SSG's mind. First, above and beyond the direct connection to workforce training, several interviewees noted that the presence of all levels of education (from K to PhD) was a very attractive and uncommon feature of a rural market.

One, a couple interviewees noted that the community had become seemingly much more open to outsiders and even more progressive in recent years, even with the long-term presence of the base (and in- and out-flow therefrom). This is always a very challenging concept to measure, but it's surprisingly important in corporate site selection, as a plant manager or executive will want to be comfortable with actually living and integrating into a community.

TARGET INDUSTRIES

SSG'S APPROACH TO TARGET INDUSTRIES

The graphic below highlights the key criteria that SSG uses to evaluate and recommend target industries. We utilize a data-driven methodology that scores and ranks every potential cluster based on how it aligns with the key quantitative criteria shown below in blue: growing industries, supporting the wage and tax base, aligning with the community's workforce value proposition, and helping diversify the local economy.

At the same time, we layer in results of a baseline, desktop site analysis to ensure that Enid's real estate portfolio can meet the needs of potential targets. However, please note that this report is not meant to provide an in-depth analysis of the strengths and weaknesses of Enid's industrial sites.

Finally, we add some common sense to recommend target industries that the community could realistically attract based on our site selection experience, view of current and potential deal flow, and other factors.

		Growth	 Industries that have grown and are projected to grow at the national and regional levels.
tative	\$	Wage & Tax Base	 Industries that have high wages (absolute and relative) and higher impact on the regional economy (ROI).
Quanti		Workforce Alignment	• Industries that align with current and future workforce value proposition.
	67	Diversify	Industries that offer further market diversification.
tive		Site Characteristics	• Real estate options that currently (or with strategic investment) can meet the needs of target industries.
Qualita	\bigcirc	Pragmatic	• Common sense strategies that align with community's vision and resources.





The analysis utilizes the Cluster framework and associated 2012 NAICS definitions developed by the U.S. Cluster Mapping project.

Key Definitions:

- <u>Industry Cluster</u>: A group of inter-related industries that drive wealth creation in a region, primarily through export of goods/services. A cluster represents the entire value chain of a broadly defined industry, spanning suppliers to end products, including support services and specialized infrastructure.
- <u>Traded Cluster</u>: A cluster which serves markets beyond the region in which it is located, while a local cluster will be defined as a cluster which serves the market in which it is located.

CONSTRUCTING THE TARGET INDUSTRY MODEL







U.S. Growth - Historic - Absolute5.0%U.S. Growth - Historic - Percentage10.0%U.S. Growth - Projected - Absolute15.0%U.S. Growth - Projected - Percentage20.0%Regional Growth - Historic - Absolute5.0%Regional Growth - Historic - Percentage10.0%Regional Growth - Projected - Absolute15.0%Regional Growth - Projected - Absolute15.0%Regional Growth - Projected - Absolute15.0%Regional Growth - Projected - Percentage20.0%Absolute Cluster Size0.0%WAGE & TAX BASE30.0%U.S. Wage Level - Overall10.0%U.S. Wage Level - Overall10.0%U.S. Wage Level - Target Wage Level30.0%U.S. Wage Level - Target Wage Level30.0%TARGET WAGE LEVEL (1)~100%Total Sales Multiplier (State)6.7%Total Sales Multiplier (State)6.7%Total Larnings Multiplier (State)6.7%Occupational Alignment - Absolute25.0%Occupational Alignment - Concentration50.0%Regional Completions (2 hours - <bach)< td="">5.0%Local Completions (2 hours - <bach)< td="">5.0%Local Completions10.0%Absolute Cluster Size20.0%Concentration80.0%</bach)<></bach)<>	INDUSTRY GROWTH	20.0%
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Notes on Analysis

<u> 1. Wage & Tax Base – Target Wages</u>

This criteria allows SSG and the community to select a target wage level that most aligns with their overall objectives and the characteristics for the community. For this engagement, we use an average hourly wage of \$20.00/hour (EMSI data shows an average wage in the region of \$21.33).

Raising this threshold will favor industries with higher paying jobs (but may be unrealistic for the community). And on the contrary, lowering this threshold will favor industries with lower paying jobs, that may be more accessible, but less desirable.

2. Complementary/Workforce Alignment

Site Selection Group used national staffing patterns for each industry cluster to identify the most common occupations present in each cluster. SSG then calculated the presence and concentration of those occupations within a 60-minute drive time of the site. In short, this identifies the types of industries that align well with the region's current workforce. SSG made similar estimates using higher education completion data, to identify which occupations align well with the types of educational completions (defined by CIP codes) coming out of local and regional educational institutions.

3. Diversify

These measures are inverted, that is, they reward industries that have no or minimal presence in an area. These measures temper focusing on industries that already have a significant presence in the region.



TARGET INDUSTRIES: QUANTITATIVE RESULTS



The figure at right shows the results of the quantitative target industry analysis for Enid. As mention on the previous page, these results give preference to clusters that pay at or about the average regional wage of \$20/hour.

Based on that target, the results of the analyses, and SSG's qualitative view of the site, we highlight and list key clusters here that may be best aligned with the community's overall value proposition. We do not simply select the highest scoring clusters, but use the results to prioritize and also understand the inherent strengths and weaknesses of the community to attract and retain those industries.

Cluster of interest include:

- Heavier Metal-Focused Manufacturing and Assembly
- Food Processing & Manufacturing
- Aerospace Vehicles & Defense
- Automotive (conditional on state strategy)

Additional information and SSG's view of overall site alignment are included on the next pages.

Please note that SSG filters out clusters that are extremely small/niche nationally (i.e. in the bottom 10% of clusters by overall size).

CLUSTER	TOTAL SCORE	GROWTH	WAGE & TAX BASE	ALIGNMENT	DIVERSIFY
Automotive	71.0%	79.0%	67.6%	70.4%	68.0%
Construction Products and Services	67.2%	79.2%	56.6%	83.5%	9.6%
Environmental Services	66.6%	82.4%	67.5%	72.4%	9.6%
Trailers, Motor Homes, and Appliances	64.4%	56.7%	62.5%	70.4%	62.0%
Nonmetal Mining	61.7%	78.1%	52.7%	70.8%	19.2%
Oil and Gas Production and Transportation	61.2%	59.2%	52.6%	84.1%	0.0%
Downstream Metal Products	61.0%	47.3%	58.8%	76.1%	34.4%
Production Technology and Heavy Machinery	60.8%	63.3%	52.3%	80.2%	3.6%
Distribution and Electronic Commerce	60.2%	68.9%	72.9%	57.1%	17.6%
Upstream Metal Manufacturing	60.0%	38.5%	75.7%	56.0%	71.6%
Recreational and Small Electronic Goods	59.1%	68.9%	48.8%	69.8%	27.6%
Coal Mining	58.3%	15.8%	61.8%	66.5%	100.0%
Medical Devices	57.6%	42.0%	49.1%	61.2%	100.0%
Transportation and Logistics	56.8%	64.3%	55.9%	63.8%	16.8%
Vulcanized and Fired Materials	56.3%	49.8%	58.0%	55.6%	67.6%
Downstream Chemical Products	55.3%	36.3%	53.9%	54.7%	100.0%
Lighting and Electrical Equipment	55.0%	39.6%	35.1%	66.4%	100.0%
Plastics	54.6%	39.7%	56.2%	49.6%	100.0%
Metal Mining	54.3%	39.5%	33.7%	65.8%	100.0%
Livestock Processing	53.3%	69.5%	46.6%	63.0%	2.4%
Metalworking Technology	53.2%	31.8%	59.8%	64.8%	30.0%
Wood Products	52.7%	49.6%	52.2%	55.3%	50.0%
Food Processing and Manufacturing	52.1%	56.4%	51.3%	60.5%	12.0%
Water Transportation	51.3%	51.9%	49.0%	53.4%	48.8%
Upstream Chemical Products	50.2%	29.1%	50.8%	48.0%	100.0%
Paper and Packaging	50.0%	17.8%	71.3%	37.5%	100.0%
Insurance Services	49.8%	60.2%	63.8%	36.8%	38.8%
Biopharmaceuticals	49.5%	41.4%	49.2%	41.2%	100.0%
Marketing, Design, and Publishing	48.2%	83.9%	52.9%	25.6%	53.2%
Video Production and Distribution	47.5%	69.4%	65.8%	18.4%	65.6%
Aerospace Vehicles and Defense	47.5%	58.7%	40.0%	46.5%	51.2%
Information Technology and Analytical Instruments	47.4%	80.1%	34.3%	39.6%	52.4%
Education and Knowledge Creation	47.1%	45.9%	53.8%	47.4%	28.4%
Hospitality and Tourism	47.0%	77.4%	27.1%	52.1%	26.0%
Electric Power Generation and Transmission	46.0%	38.0%	49.2%	54.6%	18.4%
Business Services	45.0%	80.4%	38.4%	38.0%	22.0%
Financial Services	43.9%	58.0%	43.5%	39.5%	34.8%
Furniture	42.5%	50.1%	38.5%	42.2%	40.8%
Agricultural Inputs and Services	41.8%	51.4%	39.1%	46.5%	11.6%
Performing Arts	40.2%	79.3%	45.2%	18.2%	35.2%
Communications Equipment and Services	39.2%	5.2%	56.6%	38.2%	58.8%
Forestry	37.8%	17.5%	56.6%	27.2%	64.8%
Printing Services	37.2%	34.7%	48.0%	28.5%	44.4%



Broad Cluster	Key Cluster Advantages	Key Cluster Challenges
Broad Cluster Heavy Manufacturing & Assembly	 Key Cluster Advantages Workforce: Market aligns well with overall workforce requirements for heavy and medium manufacturing, especially in metal related operations (see this workforce alignment scores here and across the entire workforce analysis). Workforce Training: Autry (and CareerTech more generally) have ample experience in supporting these types of large projects requirement metal working skill sets. And proximity to OSU for engineering pipeline should not be understated. Growth Metrics: Although in the short-term few industries are growing, overall growth trends for these industries are more favorable. Coupled with potential on/near-shoring opportunities likely to stem from COVID (and proximity to supply chains in MX), there could be opportunities in these types of industries. Site Alignment: Garfield and Easterly Industrial Park are particularly well aligned for heavier manufacturing process. There are large tracts available with limited impediments to development. Adjacent use should not be an issue for new projects to the property, but End 	 Key Cluster Challenges Competition with Oil & Gas: Across all production- oriented industries, but especially ones with large metal working requirements, prospects will be concerned about competing with oil and gas operations. SSG sees this time and time again in even large energy-focused markets. Workforce Size: Although there are some operations that have very large capital and acreage requirements with smaller headcounts, many of these types of projects require both. As a result, they tend to gravitate towards the edges of larger markets (e.g. a MidAmerica near Tulsa, or a Denton or Burleson). Utility Constraint: Easterly Industrial Park is aligned from a site characteristic perspective, but utility extensions, mainly water and sewer improvements are necessary. These utility extensions will need to be dealt with proactively for the site to be competitive in the marketplace. There will not likely be many (if any) projects that will wait for 2 miles of infrastructure extensions to Easterly given a prospect's typical rigid time constraints. (Garfield IP is alternatively
	 Should not be an issue for new projects to the property, but End should carefully present new projects to Tyson and ensure new users do not impact sensitive food production adjacent. Potential Rail Access Available: For very large projects, access to BNSF main line could be a huge advantage. 	 well-aligned with infrastructure to support heavier users.) Rail Feasibility: While rail access is available, in SSG's experience, mainline providers often have high rail car volume expectations, making it difficult to gain access for small to mid-size users.

Broad Cluster	Key Cluster Advantages	Key Cluster Challenges
	 Workforce: Overall workforce alignment in region for food manufacturing is favorable. But what really stands out is the historical expertise in agricultural industries and related ag-training programs. The data here clearly shows the potential advantages of agricultural workforce and history. 	
	✓ Significant Project Activity : While the data shown here is favorable, in SSG's recent experience, food projects are extremely active. The broader region has a significant amount of dairy and livestock experience which could be of particular interest to some end users in those sectors.	? Incumbent Operations: In SSG's experience, both existing operations and prospects in the food industry are very sensitive to potential competition concerns (especially in
 Food Processing & Manufacturing Dairy Advanced Proteins Second plants shifting capacity 	Logistics & California "Play": Like the above, rail can be a potential advantage for some very large food projects. But more importantly, SSG sees opportunity at this general longitude (e.g. Roughly I-35/I- 29 corridors) for food companies looking to shift capacity out of California to sever the central and eastern U.S. Basically, this corridor allows a logistics play to ship raw materials from the CA Central Valley as far east as practical before further processing.	 smaller markets where there may only be a couple plants). Proximity to Adjoining Uses: Some operations are going to be hesitant about locating near major operations like a chemical/fertilizer or areas with energy interests. Although Tyson located there, Garfield IP will also create some preconceived notions of risk with the USGS map indicating oil tanks adjacent.
out of CA	✓ Water & Wastewater Infrastructure: Not all, but many food projects have very large water and wastewater volume requirements. Enid must ensure that infrastructure can meet the site/project requirements, while ensuring that the system has capacity for master community planning purposes. Food Manufacturing projects will typically require anywhere from the 500,000 GPD to 2 MGD. SSG understands that Enid is doubling its water supply and further diversifying between ground water and surface. That investment will be critically important to help attract and retain more investment in the food space, but other industries as well. SSG recommends lifting up those investment figures in marketing materials and similar so prospects know about future capacities from the start	? <u>Wage Levels</u> : SSG sees it across the board, but food operation wages can really run the gamut from very well- paid wage and salary positions to operations searching for low-cost markets.



Broad Cluster	Key Cluster Advantages	Key Cluster Challenges
Aerospace	 Industrial Park at Airport: Clearly, developing industrial land around the airport with a focus on aerospace and aviation opportunities makes sense. 	? <u>Current Growth and State of Market</u> : This industry is likely to be hard hit in the medium-term by the COVID crisis. Growth metrics in our model here are moderately favorable, but SSG simply does not anticipate a lot of projects in this space.
	✓ <u>Training</u> : Showcasing physical training space at the airport is a really attractive advantage that would show well during tours. Autry is obviously a huge asset, but leveraging potential best practices from CareerTech partners in other aerospace hubs in OKC and Tulsa is another potential advantage.	? Workforce Alignment: The workforce alignment score for this cluster is not very favorable, in part due to limited industry presence here. SSG believes Enid can tell a story given existing production talent presence and training opportunities, but this will be a challenge to many
	Proximity to Wichita: In SSG's aerospace project experience, we oftentimes see operations understand the potential workforce and cluster advantages of locating in a major aerospace hub like Wichita (or even Tulsa), but they don't want to compete with other incumbent operations. Given proximity (but not being too close), this could put Enid on the map for	 prospects. Added FAA Restrictions: Developing industrial projects at airports adds another layer of complexity due to FAA restrictions. Develop relationship with airport/FAA authorities and clearly understand height/lighting restrictions to be prepared for a prospects' questions.
Automotive (Potential)	 Potential for Oklahoma: This industry scores well in the matrix analysis here, but what makes it particularly interesting in the state's focus on trying to land a large automotive OEM. If an OEM were to locate in the state (or broadly in the region), Enid could be an interesting opportunity for a mid-size, dedicated supplier that does not want to complete in a larger market. Long-term growth of the electric vehicle industry in the southwest and south-central U.S. could also lead to some operations. Given that focusing on this cluster is highly conditional on a major disruption from an OEM locate, this is more of a "be prepared" option. 	? Growth (without major OEM): Again, the data in the model show strong growth for this industry, but at least in the short-term, SSG does not anticipate a lot of activity in this space. Further, if there is no major OEM locate in the region, it's tough to imagine automotive operations looking in this part of the world, or at least this far from KC and I-35 corridor in TX.
		? <u>Utility Constraints</u> : Again, utility constraints will prevent many projects from considering Easterly IP. These utility extensions will need to be dealt with proactively to be competitive in the marketplace. There will not likely be many (if any) projects that will wait for 2 miles of infrastructure extensions to Easterly given a prospect's
	workforce Alignment & Iraining: Overall workforce alignment and training resources could well support an operation.	typical rigid time constraints. (Garfield IP is alternatively

training resources could well support an operation.

well-aligned with infrastructure to support heavier users.)



Broad Cluster	Key Cluster Advantages	Key Cluster Challenges
Entrepreneurship & Remote Work for Professional Services	Significant Opportunity for Talent Retention & Recruitment: COVID has upended the market for professional services and related projects. SSG expects to see the continued focus on remote work and related structures for the foreseeable future. But that can actually be a significant advantage for small markets like Enid for a talent attraction and retention strategy given interest in remote work in smaller markets. There's no singular strategy for success on this front: it's a combination of strong investment in education and training, continued development of quality of place, and potential enticements (e.g. Tulsa's remote program).	? Very Few "Traditional" Projects: Candidly, the COVID pandemic could have a major medium and long-term disruption on professional services projects. And many of these projects are going to search for "goldilocks" markets and submarkets that are not too big (e.g. major central business districts in major metros), but also can satisfy workforce requirements. It's simply going to be tough for a small market to like Enid to compete in this space.

APPENDIX

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Definitions

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20 Minute Demographic & Occupational Data

OCCUPATIONAL CLUSTER DEFINITIONS

PRODUCTION – ALL SOC Description 51-0000 Production Workers

PRODUCTION – FOOD		
SOC	Description	
51-1011	First-Line Supervisors of Production and Operating Workers	
51-3011	Bakers	
51-3022	Meat, Poultry, and Fish Cutters and Trimmers	
51-3023	Slaughterers and Meat Packers	
51-3091	Food and Tobacco Roasting, Baking, and Drying Machine Operators and Tenders	
51-3092	Food Batchmakers	
51-3093	Food Cooking Machine Operators and Tenders	
51-3099	Food Processing Workers, All Other	
51-9012	Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	
51-9023	Mixing and Blending Machine Setters, Operators, and Tenders	
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	
51-9111	Packaging and Filling Machine Operators and Tenders	
51-9198	HelpersProduction Workers	

PRODUCTION – METAL		
SOC	Description	
51-1011	First-Line Supervisors of Production and Operating Workers	
51-2041	Structural Metal Fabricators and Fitters	
51-2098	Assemblers and Fabricators, All Other, Including Team Assemblers	
51-4011	Computer-Controlled Machine Tool Operators, Metal and Plastic	
51-4021	Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic	
51-4031	Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	
51-4033	Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic	
51-4041	Machinists	
51-4072	Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	
51-4081	Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	
51-4111	Tool and Die Makers	
51-4121	Welders, Cutters, Solderers, and Brazers	
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	
51-9121	Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	
51-9198	HelpersProduction Workers	
51-9199	Production Workers, All Other	

PRODUCTION – CHEMICAL			
SOC	Description		
51-1011	First-Line Supervisors of Production and Operating Workers		
51-4021	Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic		
51-6091	Extruding and Forming Machine Setters, Operators, and Tenders, Synthetic and Glass Fibers		
51-8091	Chemical Plant and System Operators		
51-8092	Gas Plant Operators		
51-8099	Plant and System Operators, All Other		
51-9011	Chemical Equipment Operators and Tenders		
51-9012	Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders		
51-9023	Mixing and Blending Machine Setters, Operators, and Tenders		
51-9041	Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders		
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers		
51-9111	Packaging and Filling Machine Operators and Tenders		
51-9121	Coating, Painting, and Spraying Machine Setters, Operators, and Tenders		
51-9192	Cleaning, Washing, and Metal Pickling Equipment Operators and Tenders		
51-9198	HelpersProduction Workers		
51-9199	Production Workers, All Other		
OCCUPATIONAL CLUSTER DEFINITIONS – CONT.

PRODUCTION – ELECTRONICS

Description	
First-Line Supervisors of Production and Operating Workers	
Coil Winders, Tapers, and Finishers	
Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	
Assemblers and Fabricators, All Other, Including Team Assemblers	
Computer-Controlled Machine Tool Operators, Metal and Plastic	
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	
Machinists	
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	
Welders, Cutters, Solderers, and Brazers	
Inspectors, Testers, Sorters, Samplers, and Weighers	
Semiconductor Processors	
HelpersProduction Workers	
Production Workers, All Other	

ENGINEERING			
SOC	Description		
11-3051	Industrial Production Managers		
11-9041	Architectural and Engineering Managers		
17-2011	Aerospace Engineers		
17-2031	Biomedical Engineers		
17-2041	Chemical Engineers		
17-2061	Computer Hardware Engineers		
17-2071	Electrical Engineers		
17-2072	Electronics Engineers, Except Computer		
17-2111	Health and Safety Engineers, Except Mining Safety Engineers and Inspectors		
17-2112	Industrial Engineers		
17-2131	Materials Engineers		
17-2141	Mechanical Engineers		
17-2199	Engineers, All Other		

MAINTENANCE			
SOC	Description		
47-2111	Electricians		
49-1011	First-Line Supervisors of Mechanics, Installers, and Repairers		
49-2094	Electrical and Electronics Repairers, Commercial and Industrial Equipment		
49-9041	Industrial Machinery Mechanics		
49-9043	Maintenance Workers, Machinery		
49-9044	Millwrights		

LOGISTICS			
SOC	Description		
43-5081	Stock Clerks and Order Fillers		
53-1048	First-line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors		
53-3032	Heavy and Tractor-Trailer Truck Drivers		
53-7051	Industrial Truck and Tractor Operators		
53-7062	Laborers and Freight, Stock, and Material Movers, Hand		
53-7063	Machine Feeders and Offbearers		
53-7064	Packers and Packagers, Hand		

SUPPLEMENTAL LABOR			
SOC	Description		
35-2011	Cooks, Fast Food		
35-2015	Cooks, Short Order		
35-3021	Food Preparation & Serving Workers		
35-3022	Counter Attendants, Cafeteria, Food Concession, and Coffee Shop		
35-3031	Waiters and Waitresses		
35-3041	Food Servers, Nonrestaurant		
35-9011	Dining Room and Cafeteria Attendants and Bartender Helpers		
35-9021	Dishwashers		
35-9031	Hosts/Hostesses		
35-9099	Food Preparation and Serving Related Workers, All Other		
41-2011	Cashiers		
41-2021	Counter and Rental Clerks		
41-2031	Retail Salespersons		

OCCUPATIONAL CLUSTER DEFINITIONS – CONT.

SCIENCE			
SOC	Description		
19-1011	Animal Scientists		
19-1012	Food Scientists and Technologists		
19-1013	Soil and Plant Scientists		
19-1021	Biochemists and Biophysicists		
19-1022	Microbiologists		
19-1023	Zoologists and Wildlife Biologists		
19-1029	Biological Scientists, All Other		
19-1031	Conservation Scientists		
19-1032	Foresters		
19-1041	Epidemiologists		
19-1042	Medical Scientists, Except Epidemiologists		
19-1099	Life Scientists, All Other		
19-2011	Astronomers		
19-2012	Physicists		
19-2021	Atmospheric and Space Scientists		
19-2031	Chemists		
19-2032	Materials Scientists		
19-2041	Environmental Scientists and Specialists		
19-2042	Geoscientists		
19-2043	Hydrologists		
19-2099	Physical Scientists, All Other		
19-4011	Agricultural and Food Science Technicians		
19-4021	Biological Technicians		

SCIENCE – CONTINUED			
SOC	Description		
19-4041	Geological and Petroleum Technicians		
19-4051	Nuclear Technicians		
19-4061	Social Science Research Assistants		
19-4091	Environmental Science and Protection Technicians, Including Health		
19-4092	Forensic Science Technicians		
19-4093	Forest and Conservation Technicians		
19-4099	Life, Physical, and Social Science Technicians, All Other		
FINANCE & ACCOUNTING			
SOC	Description		
11-3031	Financial Managers		
13-1041	Compliance Officers		
13-2011	Accountants and Auditors		
13-2031	Budget Analysts		
13-2041	Credit Analysts		
13-2051	Financial Analysts		
13-2061	Financial Examiners		
13-2081	Tax Examiners & Collectors, & Revenue Agents		
13-2099	Financial Specialists, All Other		
15-2011	Actuaries		
15-2021	Mathematicians		
15-2031	Operations Research Analysts		
15-2041	Statisticians		
19-3011	Economists		

Securities, Commodities, and Financial Services 41-3031 Sales Agents

INFORMATION TECHNOLOGY		
SOC	Description	
11-3021	Computer and Information Systems Managers	
15-1111	Computer and Information Research Scientists	
15-1121	Computer Systems Analysts	
15-1122	Information Security Analysts	
15-1131	Computer Programmers	
15-1132	Software Developers, Applications	
15-1133	Software Developers, Systems Software	
15-1134	Web Developers	
15-1141	Database Administrators	
15-1142	Network and Computer Systems Administrators	
15-1143	Computer Network Architects	
15-1151	Computer User Support Specialists	
15-1152	Computer Network Support Specialists	
15-1199	Computer Occupations, All Other	
15-2021	Mathematicians	
15-2031	Operations Research Analysts	
15-2041	Statisticians	
17-2061	Computer Hardware Engineers	
43-9011	Computer Operators	

HEALTHCARE			
SOC	Description		
29-0000	Healthcare Occupations		

• Definitions

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20 Minute Demographic & Occupational Data

Population



Population & Workforce Summary

• The charts at left show simply the absolute number of people and the labor force within a 20 minute drive time of each comparison point.

Labor Force



Labor Force Participation Rate: MSA/County



Labor Force Participation Rate Summary

 Labor force participation can be a useful indicator of whether there is any potential "slack" remaining in a market and how much of the population is working.

Unemployment Rate: MSA/County



Unemployment Summary

• The chart at left shows historical unemployment rates for each comparison location over the past five years.

Population Growth: Historic (2010-2019) and Projected Growth (2019-2024)



Population Summary

• The figure at top right shows historic population growth (since 2010) and projected population growth over the next five years (to 2024).

Age Breakdown with Median Age



Median Age

Age Summary

 Companies place an increasingly large emphasis on locating in markets with a young, sustainable workforce. Whether explicitly looking for attractive markets for "millennials" or just markets that have long term demographic advantages, the age profile of a market can make a significant difference.

Income Breakdown with Median Income



Educational Attainment: Population 25+

Stillwater	26% 22%		52%
Columbus (MS)	45%	20%	35%
Wichita (KS)	40%	25%	35%
Tulsa (North)	45%	23%	31%
OKC (South)	46%	25%	30%
Enid	48%	23%	30%
Wichita Falls (TX)	47%	24%	29%
Muskogee	48%	25%	27%
Garden City (KS)	53%	20%	27%
Ardmore	53%	21%	26%
-	HS & Below	ome College Degrees	

Income Summary

• Target income profiles can swing greatly by the type of requirement, with some companies wanting a higher income profile while some put more emphasis on moderate income levels as a proxy for skill and wage profiles.

Educational Summary

· Like on income profiles, the target educational profile of a community can vary considerably by the type of project. That being said, for a premier site having a higher share of individuals with degrees (associate's, bachelor's, and above) can be seen as more favorable.

SUPPLY: PRODUCTION – ALL



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Production – All Presence Summary

• The chart at left shows the absolute number of workers in the Production – All cluster within the 20 minute drive time.

Production – All Concentration Summary

• The chart at left shows the concentration of workers in the Production – All cluster within the 20 minute drive time.

Production – All Growth Summary

• The chart at left shows five years of historic growth trends and five years of projected growth for the Production – All cluster.

DEMAND: PRODUCTION – ALL



Production – All Demand Summary

• The chart at right shows the relative demand for workers in the Production – All cluster by comparing overall industry presence to job postings activity.

Production – All Wages Summary

The chart at right shows the growth in salaries for the Production

 All cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.

Demand: Measure of hiring demand vs. occupational presence





SUPPLY: PRODUCTION – FOOD



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Production – Food Presence Summary

• The chart at left shows the absolute number of workers in the Production – Food cluster within the 20 minute drive time.

Production – Food Concentration Summary

• The chart at left shows the concentration of workers in the Production – Food cluster within the 20 minute drive time.

Production – Food Growth Summary

• The chart at left shows five years of historic growth trends and five years of projected growth for the Production – Food cluster.

DEMAND: PRODUCTION – FOOD



Production – Food Demand Summary

 The chart at right shows the relative demand for workers in the Production – Food cluster by comparing overall industry presence to job postings activity.

Production – Food Wages Summary

The chart at right shows the growth in salaries for the Production

 Food cluster over the past ten years. The emphasis here is on
the change over time rather than on absolute wage/salary levels.

Demand: Measure of hiring demand vs. occupational presence





SUPPLY: PRODUCTION – METAL



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Production – Metal Presence Summary

• The chart at left shows the absolute number of workers in the Production – Metal cluster within the 20 minute drive time.

Production – Metal Concentration Summary

• The chart at left shows the concentration of workers in the Production – Metal cluster within the 20 minute drive time.

Production – Metal Growth Summary

• The chart at left shows five years of historic growth trends and five years of projected growth for the Production – Metal cluster.

DEMAND: PRODUCTION – METAL



Production – Metal Demand Summary

 The chart at right shows the relative demand for workers in the Production – Metal cluster by comparing overall industry presence to job postings activity.

Production – Metal Wages Summary

• The chart at right shows the growth in salaries for the Production – Metal cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.



Demand: Measure of hiring demand vs. occupational presence





SUPPLY: PRODUCTION – CHEMICAL



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Production – Chemical Presence Summary

• The chart at left shows the absolute number of workers in the Production – Chemical cluster within the 20 minute drive time.

Production – Chemical Concentration Summary

• The chart at left shows the concentration of workers in the Production – Chemical cluster within the 20 minute drive time.

Production – Chemical Growth Summary

 The chart at left shows five years of historic growth trends and five years of projected growth for the Production – Chemical cluster.

DEMAND: PRODUCTION – CHEMICAL



Production – Chemical Demand Summary

• The chart at right shows the relative demand for workers in the Production – Chemical cluster by comparing overall industry presence to job postings activity.

Production – Chemical Wages Summary

The chart at right shows the growth in salaries for the Production

 Chemical cluster over the past ten years. The emphasis here is
 on the change over time rather than on absolute wage/salary
 levels.

Demand: Measure of hiring demand vs. occupational presence





SUPPLY: PRODUCTION – ELECTRONICS



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Production – Electronics Presence Summary

• The chart at left shows the absolute number of workers in the Production – Electronics cluster within the 20 minute drive time.

Production – Electronics Concentration Summary

• The chart at left shows the concentration of workers in the Production – Electronics cluster within the 20 minute drive time.

Production – Electronics Growth Summary

 The chart at left shows five years of historic growth trends and five years of projected growth for the Production – Electronics cluster.

DEMAND: PRODUCTION – ELECTRONICS

Production – Electronics Demand Summary

• The chart at right shows the relative demand for workers in the Production – Electronics cluster by comparing overall industry presence to job postings activity.

Production – Electronics Wages Summary

The chart at right shows the growth in salaries for the Production

 Electronics cluster over the past ten years. The emphasis here
 is on the change over time rather than on absolute wage/salary
 levels.



Demand: Measure of hiring demand vs. occupational presence





SUPPLY: MAINTENANCE



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Maintenance Presence Summary

• The chart at left shows the absolute number of workers in the Maintenance cluster within the 20 minute drive time.

Maintenance Concentration Summary

• The chart at left shows the concentration of workers in the Maintenance cluster within the 20 minute drive time.

Maintenance Growth Summary

• The chart at left shows five years of historic growth trends and five years of projected growth for the Maintenance cluster.

DEMAND: MAINTENANCE



Maintenance Demand Summary

• The chart at right shows the relative demand for workers in the Maintenance cluster by comparing overall industry presence to job postings activity.

Maintenance Wages Summary

• The chart at right shows the growth in salaries for the Maintenance cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.

Demand: Measure of hiring demand vs. occupational presence





SUPPLY: ENGINEERING



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Engineering Presence Summary

• The chart at left shows the absolute number of workers in the Engineering cluster within the 20 minute drive time.

Engineering Concentration Summary

• The chart at left shows the concentration of workers in the Engineering cluster within the 20 minute drive time.

Engineering Growth Summary

• The chart at left shows five years of historic growth trends and five years of projected growth for the Engineering cluster.

DEMAND: ENGINEERING



Engineering Demand Summary

• The chart at right shows the relative demand for workers in the Engineering cluster by comparing overall industry presence to job postings activity.



• The chart at right shows the growth in salaries for the Engineering cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.







SUPPLY: LOGISTICS

Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Logistics Presence Summary

• The chart at left shows the absolute number of workers in the Logistics cluster within the 20 minute drive time.

Logistics Concentration Summary

• The chart at left shows the concentration of workers in the Logistics cluster within the 20 minute drive time.

Logistics Growth Summary

• The chart at left shows five years of historic growth trends and five years of projected growth for the Logistics cluster.

DEMAND: LOGISTICS

Logistics Demand Summary

• The chart at right shows the relative demand for workers in the Logistics cluster by comparing overall industry presence to job postings activity.

Logistics Wages Summary

• The chart at right shows the growth in salaries for the Logistics cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.

Demand: Measure of hiring demand vs. occupational presence





SUPPLY: SCIENCE

Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Science Presence Summary

• The chart at left shows the absolute number of workers in the Science cluster within the 20 minute drive time.

Science Concentration Summary

• The chart at left shows the concentration of workers in the Science cluster within the 20 minute drive time.

Science Growth Summary

• The chart at left shows five years of historic growth trends and five years of projected growth for the Science cluster.

DEMAND: SCIENCE

Science Demand Summary

• The chart at right shows the relative demand for workers in the Science cluster by comparing overall industry presence to job postings activity.

Science Wages Summary

• The chart at right shows the growth in salaries for the Science cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.

Demand: Measure of hiring demand vs. occupational presence







Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Healthcare Presence Summary

• The chart at left shows the absolute number of workers in the Healthcare cluster within the 20 minute drive time.

Healthcare Concentration Summary

• The chart at left shows the concentration of workers in the Healthcare cluster within the 20 minute drive time.

Healthcare Growth Summary

• The chart at left shows five years of historic growth trends and five years of projected growth for the Healthcare cluster.

DEMAND: HEALTHCARE



Healthcare Demand Summary

• The chart at right shows the relative demand for workers in the Healthcare cluster by comparing overall industry presence to job postings activity.

Healthcare Wages Summary

• The chart at right shows the growth in salaries for the Healthcare cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.



Demand: Measure of hiring demand vs. occupational presence







Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Finance & Accounting Presence Summary

• The chart at left shows the absolute number of workers in the Finance & Accounting cluster within the 20 minute drive time.

Finance & Accounting Concentration Summary

• The chart at left shows the concentration of workers in the Finance & Accounting cluster within the 20 minute drive time.

Finance & Accounting Growth Summary

• The chart at left shows five years of historic growth trends and five years of projected growth for the Finance & Accounting cluster.

DEMAND: FINANCE & ACCOUNTING



Finance & Accounting Demand Summary

• The chart at right shows the relative demand for workers in the Finance & Accounting cluster by comparing overall industry presence to job postings activity.

Finance & Accounting Wages Summary

• The chart at right shows the growth in salaries for the Finance & Accounting cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.





SUPPLY: INFORMATION TECHNOLOGY



Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Information Technology Presence Summary

• The chart at left shows the absolute number of workers in the Information Technology cluster within the 20 minute drive time.

Information Technology Concentration Summary

• The chart at left shows the concentration of workers in the Information Technology cluster within the 20 minute drive time.

Information Technology Growth Summary

• The chart at left shows five years of historic growth trends and five years of projected growth for the Information Technology cluster.

DEMAND: INFORMATION TECHNOLOGY



Information Technology Demand Summary

• The chart at right shows the relative demand for workers in the Information Technology cluster by comparing overall industry presence to job postings activity.

Information Technology Wages Summary

• The chart at right shows the growth in salaries for the Information Technology cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.



Demand: Measure of hiring demand vs. occupational presence





Occupational Presence: Overall count of workers



Occupational Concentration: Greater than 1.00 means high concentration



Occupational Growth: 5 Year Historic & Projected (2014 = 0)



Supplemental Labor Presence Summary

• The chart at left shows the absolute number of workers in the Supplemental Labor cluster within the 20 minute drive time.

Supplemental Labor Concentration Summary

• The chart at left shows the concentration of workers in the Supplemental Labor cluster within the 20 minute drive time.

Supplemental Labor Growth Summary

• The chart at left shows five years of historic growth trends and five years of projected growth for the Supplemental Labor cluster.

DEMAND: SUPPLEMENTAL LABOR



Supplemental Labor Demand Summary

• The chart at right shows the relative demand for workers in the Supplemental Labor cluster by comparing overall industry presence to job postings activity.

Supplemental Labor Wages Summary

• The chart at right shows the growth in salaries for the Supplemental Labor cluster over the past ten years. The emphasis here is on the change over time rather than on absolute wage/salary levels.

Demand: Measure of hiring demand vs. occupational presence







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