



2014 Lawton/Comanche Co. Economic Outlook

Lawton fared well in the recent recession but slumped severely in 2011 & 2012 under Federal spending cuts. Recovery began in early 2013, and further moderate growth is expected in 2014. The rebound has been led by strong growth in the private services sectors, but weakness remains in overall government-related hiring.

Lawton Growth Strong but Uneven in National Recession. The Lawton area economy carried tremendous momentum into the recent national recession, driven by BRAC-related expansion at Ft. Sill. Measured by total wage & salary employment, the region seemingly ignored the recession as strong hiring in the military, federal civilian government, and local government sectors more than offset private sector job losses. From early 2007 to early 2010, Lawton managed to add nearly 3,000 net new civilian jobs (8% gain) while the nation languished in recession. Local job gains occurred in several key private sectors during the national recession, including construction, health care, and accommodation and food services.

Despite overall job gains driven by strength in the Federal sector, the private side of the local economy suffered significant job losses during the national recession, particularly in manufacturing, financial services, retail and wholesale trade, and state government. These same sectors were among the hardest hit nationally. Comanche County suffered private sector job losses of -0.6% (185 jobs) in 2009 and -0.9% (260 jobs) in 2010. The local unemployment rate increased steadily from 3.5% in early 2008 to near 7% by early 2010. Retail sales showed early signs of weakness with a small decline of -0.1% for all of 2009 after posting a robust 7.6% gain in 2008.

Federal Spending Cuts Push Lawton into Recession. The broader Lawton economy eventually slumped in 2010 as the private sector was undercut further by a sharp reversal of the prior gains in Federal civilian and military employment. The region slipped into recession and remained there throughout much of 2011 and 2012 as the nation moved into recovery.

Civilian wage and salary job losses totaled roughly 1,800 (a 4.4% decline) between the 2nd quarter of 2010 and 3rd quarter of 2012. The region lost an additional 1,800 military personnel in the same period (12.5% of total local military jobs). This pushed the total job loss in Comanche County to roughly 6.0% of combined military and civilian wage and salary jobs. For comparison, the local job contraction was roughly on par with the 6.3% private sector job loss nationally in the recent recession.

Most private sector job losses in the period were confined to finance and insurance; retail trade; transportation and warehousing; accommodation and food services; and professional and technical services. Finance and insurance was hardest hit among the major private sectors in both percentage and absolute terms, posting a 25% decline (550 jobs) in employment. Conversely, the key construction and health care sectors managed to remain relatively strong and add jobs throughout the slowdown.

Private Sector Rebound Underway Since Early 2013. Clear signs of an economic rebound emerged in Lawton in early 2013, and the transition to recovery is now underway. A hiring surge began in the 1st quarter of 2013 in several key cyclical sectors including retail trade; transportation and warehousing; real estate; and professional, scientific, and technical services. State government hiring rebounded sharply in late 2012 and accelerated further in 2013.

Perhaps most importantly, growth in wage and salary income in the private sector accelerated rapidly beginning in the 4th quarter of 2012. Wage growth (ex-military) in Lawton is estimated to reach a robust 7.4% for all of 2013.

Retail sales in Comanche County also bottomed in early 2013, with sales growth exceeding a 10% annual rate in by the 3rd and 4th quarters of 2013. The 4th quarter rise represents the region's first year-over-year retail sales gain in the recovery.

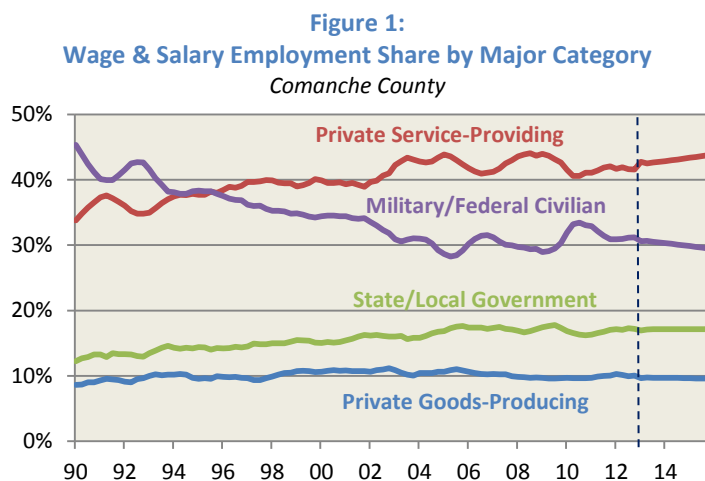
Periodic layoffs have continued to introduce noise into the recovery, but the stage was firmly set in 2013 for continued recovery and expansion in the Lawton region in 2014.

Growth Will Remain Moderate in Lawton in 2014. While the recovery is solidly underway in the Lawton region, several factors suggest that it may be muted somewhat in 2014. These factors include:

1. Limited growth prospects in the military sector;
2. Continued contraction in Federal civilian hiring;
3. Flat local government hiring;
4. A continued small share of private sector employment in the local economy; and
5. Weak economic conditions in nearby regions.

Each of these factors will work to constrain our outlook for Lawton in 2014. Most of the factors are related to the role of the government sector in the region and represent external drag generated from outside the region. Each factor is discussed in the following sections.

Stabilization of Federal Impact. The Lawton economy remains heavily influenced by military and Federal civilian government activity. As shown in Figure 1, the share of wage and salary jobs in Comanche County held by either military personnel or Federal civilian workers is currently 30%. Significant progress was made in reducing this share between 1990 and 2005, as the share steadily diminished from about 45% to only 30%. The share bounced back to nearly 35% in 2010 under BRAC-driven changes but has since returned to 30%. Our model-based forecast suggests that this share is likely to resume its slow long-run decline going forward given current forecasts for U.S. government spending.



The large share of Federal sector employment dictates that the pace at which this activity stabilizes and returns to growth will influence the level of overall economic activity in the region in 2014. Great uncertainty remains over both the level of Federal spending going forward and the eventual degree of streamlining of the U.S. military. Current forecasts suggest that both sectors have limited short-run growth prospects and will likely provide little meaningful economic stimulus to the Lawton area economy in 2014. Any errors surrounding these forecasts are also expected to be to the downside.

For the military sector, earnings both in Lawton and statewide bottomed in 2012 and returned to only a slow pace of growth in early 2013. While the return to growth in military earnings provides a critical underpinning for the overall recovery of the region in 2013 and 2014, forecasts for military spending and personnel counts through 2015

suggest that any short-run bounce back large enough to stimulate 2014 growth is highly unlikely.

Federal civilian government hiring is only roughly one-third the level of military hiring but the sector remains comparatively weaker. Employment collapsed in late 2010 and remains down by roughly 500-700 jobs since 2010. This represents a more than 10% decline (adjusted for 2010 Census workers) with no clear evidence yet of a bottom in hiring. Wages earned by Federal civilian workers has shown limited signs of recovery with an estimated 3.3% gain for 2013.

The concern over weakness on the Federal side is heightened by the growing economic potential of this activity in recent years. The strong economic impact on the local economy of both the recent BRAC-driven expansion and the ensuing contraction of Federal activity serve as clear evidence of its influence.

In fact, when measured by the level of employee compensation earned in the region, the economic influence of Federal-related employment has increased significantly the past decade. Total military compensation reported in Lawton (and statewide) more than doubled between 2001 and 2011, despite the number of military personnel in Lawton (and statewide) declining by about 10%. Reported average annual compensation jumped from about \$35,000 to more than \$70,000 per military personnel in Comanche County. A similar jump in compensation has taken place for Federal civilian government workers in Lawton the past decade, with average compensation rising nearly two-thirds, from \$31,000 in 2001 to more than \$50,000 in 2011.

Protracted overall weakness in the Federal sector suggests that it will not provide meaningful economic stimulus to the region in 2014. Our forecast suggests that 2015 is the earliest the Federal sector could play a role in accelerating the pace of activity in Lawton.

Changing Structural Influence of the Government Sector on Lawton.

A related concern for the 2014 Lawton outlook is the region's heavy overall concentration of government-related employment. As shown in Figure 1, there are currently only slightly more private sector jobs (29,238/52%) than government-related jobs (26,592/48%) in Comanche County. This is a remarkably high share of government employment, even among regions with large military installations.

Private service-providing firms currently comprise only 42% of wage and salary employment, with private goods-producing firms employing 10%. The low share of private

sector activity naturally constrains its ability to support a broad-based recovery in the region in periods when the government sectors are broadly weak.

Currently, hiring at all levels of government except state government remain weak, with state government the smallest sector with only about 1,600 workers. Local government, however, is a large employment sector with more than 8,300 workers but has added no net new jobs since mid-year 2010. The sector represents nearly 15% of local wage and salary employment and continues to act as a drag on overall employment in the region.

While the share of private sector activity in the region is likely to change only slowly, significant progress has been made the past two decades. The current 52% share for private wage and salary employment represents significant improvement over the 42% share as recently as 1990. Further reduction in the government share of local employment going forward will only enhance the ability of the private sector to sway overall economic conditions.

Regional Weakness Hampers Lawton Recovery.

The slow pace of activity in the region surrounding Lawton may also work to constrain the pace of recovery locally in 2014. The local economy will have to work against economic drag from weak economic conditions in the southwest quadrant of the state.

Along with the eastern edge of the state, the southwest portion of Oklahoma has experienced the weakest overall economic conditions during the recovery. A number of counties adjacent to Comanche, including Caddo, Kiowa, Tillman, and Cotton, have all experienced extended economic weakness since the state recovery began in early 2010. A dominant reason for the underperformance is limited exposure to oil and gas activity relative to other areas of the state. Other common threads include low per-capita incomes, weak retail markets, and long-run population declines.

Nearby Jackson County (Altus) has similarly experienced significant military and Federal civilian cuts, as well as a decline in private sector employment totaling nearly 15% since the onset of the national recession.

Jointly, these nearby regions will likely exert some economic drag on the broader regional economy next year. A strong overall recovery in Lawton is unlikely to take hold until economic growth stabilizes across these neighboring markets.

The 2014 Outlook Calls for Further Moderate Growth led by Private Sector Hiring. Our outlook for 2014 calls for a continuation of the recovery that took hold in the region in 2013. Despite a number of external

Figure 2.
Forecasted Growth in Key Lawton Economic Indicators

Region	Year-over-Year Growth					
	2009	2010	2011	2012	2013e	2014f
Wage & Salary Employment	1.3%	0.4%	-1.1%	-1.2%	2.0%	1.4%
Wage & Salary Income	4.1%	3.8%	1.5%	-0.4%	7.4%	6.8%
Retail Sales	-0.1%	4.5%	-2.0%	3.9%	-1.2%	4.1%
Military Employment	-2.2%	15.6%	-6.2%	-5.7%	1.6%	1.1%
Federal Civilian Employment	8.2%	17.0%	-3.7%	-1.9%	-3.5%	-3.5%
Population	1.7%	4.5%	0.3%	0.5%	0.6%	1.0%

and structural factors holding back the pace of growth, the Lawton area is poised to expand at a healthy but moderate pace in 2014. Overall, the forecast suggests a solid recovery in the private sector offset by continued economic drag from most levels of government reflects – essentially a reversal of conditions that were in place early in the slowdown.

Figure 2 summarizes growth projections for key Lawton economic indicators through 2014. Local civilian wage and salary job growth is estimated to reach 2.0% (800 jobs) for all of 2013 before easing to 1.4% (600 jobs) in 2014. This represents a sharp reversal of wage and salary job losses of -1.1% in 2011 and -1.2% in 2012. Total civilian wage and salary employment should return by year-end to roughly the peak set in 2010.

Our forecast anticipates a measureable decline in the local unemployment rate during 2014, from the most recent rate of 6.3% in December 2013 to near 5.3% by year-end. Little progress has been made to date on reducing the jobless rate, but it is well-known to respond with an extended lag to changes in broader economic conditions.

Retail sales in Comanche County are forecasted to post a moderate 4.1% year-over-year gain in 2014 and should ease some of the pressure on local government finances. This would represent the largest annual gain in local retail sales since the slowdown began in 2010.

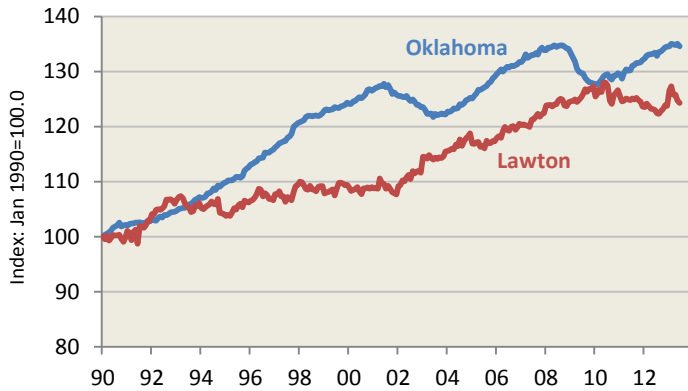
Lawton Remains on a Unique Economic Cycle. Our 2014 forecast for Lawton is not highly dependent upon the economic outlook for either the state or nation. Lawton has long had a unique economic cycle that often moves countercyclical to both the nation and state. The current recession and recovery cycle is no exception.

Figure 3 illustrates the often loose relationship between local and state employment growth since 1990. Lawton moved countercyclical to the state in the recent recession and in both the 1990 and 2001 slowdowns.

The Lawton region also exhibits little of the historical ‘energy-state’ cycle that dominates many other regions of the state. For this reason, the state and national outlook for 2014 are only relevant to the degree they affect the outlook

Figure 3:

Oklahoma vs. Comanche County Wage & Salary Employment
Indexed to January 1990



for Federal and state government employment and spending locally.

Government Hiring Mixed, Remains a Constraint in 2014. Our forecast calls for local military hiring to fully stabilize in 2013 and increase slightly by about 100 personnel (1.1% gain) in 2014. This will push the estimated number of local military personnel to approximately 12,900.

Federal civilian payrolls are expected to remain constrained by tight budgets and continue to decline through 2014 by about 300 additional workers. The expected Federal civilian loss will likely more than offset any small gain in military personnel.

Local government payrolls have remained flat since 2011 but are expected to rise for the first time in the recovery in 2014. Wage income in the sector accelerated rapidly beginning in early 2013, as local governments are expected to add 130 jobs (1.7% gain) in 2014. The expected hiring strength reflects the broad economic recovery underway locally.

State government hiring in Comanche County surged 4.6% (60 jobs) in 2012 and 6.2% (90 jobs) in 2013. This is typical of the hiring pattern in most counties across the state with a high concentration of state employees. State government hiring is expected to ease to 1.7% (25 jobs) in 2014 as delayed hiring during the recession is exhausted.

For overall government-related hiring, weakness in Federal civilian hiring is expected to offset any expected gains in all other areas of government in 2014.

Local Goods-Producing Sectors Provide Stability in 2014. Much like the government sectors, Lawton's goods-producing industries should return to stability in 2014 but are not expected to be a major source of hiring.

The construction sector was supported by a significant local building surge throughout the slowdown but underwent a

late restructuring in 2013 that pushed employment in the sector lower by an estimated 7.3% for all of 2013. We anticipate a slight rebound in 2014 with modest growth in construction jobs of 2.0% (35 jobs), a rate more consistent with the overall pace of recovery in the region. A number of ongoing projects will work to provide a floor to construction hiring in 2014.

Employment in Lawton's large and critical manufacturing sector declined by 15% (600 jobs) during the national recession and has recovered only about one-third of the jobs at this point. While manufacturing output continues to rise at both the state and national levels, gains in manufacturing employment showed tremendous fatigue in both 2012 and 2013. The U.S. manufacturing sector is expected to face an uphill battle as a source of significant job growth in 2014 and 2015, both nationally and locally. Our forecast for Lawton calls for an estimated gain in factory jobs of 1.1% (40 jobs) in 2013 to be followed by modest growth of 0.7% (25 jobs) in 2014. Local factory jobs are expected to remain roughly 10% below the recent 2007 peak at year-end 2014.

Unlike most counties across the state, oil and gas activity will provide little economic boost to the Lawton region in 2014. More than 50 of the state's 77 counties derive at least 3% of local wage and salary income from oil and gas activity. However, in Comanche County, only about 100 jobs are in the mining sector and they contribute only 0.4% of total wage and salary income. While the region has historically been insulated against negative shocks from the oil and gas industry, Lawton remains locked-out of the large economic gains generated by the sector in many areas of the state the past decade.

Service-Providing Sectors Create Most New Jobs. The service-providing sectors should build upon the rebound that emerged in 2013 and provide the bulk of the net new hiring in the Lawton region in 2014.

Perhaps the clear standout in the recovery to date is the hard-hit professional, scientific, and technical services sector. After losing 400 jobs in the downturn, the sector posted a 10.2% gain (100 jobs) in 2012, and an estimated 19.9% gain (225 jobs) for all of 2013. A major new employer in the region represents much of the 2013 gain. Our forecast calls for the surge in hiring to ease in 2014 to a 2.2% gain, but the sector should continue to provide many of the highest quality new service jobs in the region.

The health care sector lost roughly 300 jobs in the slowdown but has since set new highs with a 3.6% gain (125 jobs) in 2012 and an estimated 6.5% gain (220 jobs) for all of 2013. Our forecast calls for continued strength in the sector driven by implementation of the Affordable Care Act

and a hiring gain of 3.5% (130 jobs) in 2014. Similar strength in health care employment is visible in most counties across the state.

The highly cyclical wholesale and retail trade sectors served as a key source of employment early in the recovery and should continue to add jobs as the local recovery matures. Gains will likely ease from the 2.9% surge estimated for 2013, as our forecast calls for 70 new jobs (1.3% gain) in 2014. The related transportation and warehousing sector added jobs at an estimated 15% pace (160 jobs) for all of 2013 but should similarly ease to a 1.7% gain (20 jobs) in 2014.

The real estate sector continues to restructure following the housing buildup related to the BRAC expansion and is expected to provide few new jobs in 2014. Extreme hiring weakness in the related finance and insurance sector since the onset of the national recession in 2008 is likely to push into 2014, with our forecast calling for flat hiring in the sector.

Accommodations and food services remain highly cyclical and should continue the rebound started in 2013. An estimated 90 new jobs (2.1% gain) were created in 2013 and an additional 130 (2.9% gain) are expected in 2014.

Overall, the private services sectors will serve as the engine of growth in Lawton in 2014 and are expected to generate nearly all of the 600 net new jobs forecasted for the region.

Population Growth Remains Intact. Regions that go through protracted economic weakness often experience a related population drain. This has not been the case to date with the Lawton area slowdown. Comanche County population growth slowed to 0.3% in 2011 and 0.5% in 2012, but local population remains up by more than 5% between the 2009 and 2012 Census estimates. This growth remains much stronger than in most adjacent counties and the southwest portion of the state.

Our model-based estimates suggest further county population growth of 0.6% for 2013 and a gain near 1.0% for 2014. Despite recessionary conditions in 2011 and 2012, both the city of Lawton and Comanche County likely established all-time highs in population in 2013.

February 17, 2014

Economic Indicators – Lawton/Comanche County, Oklahoma

Economic Indicator	2009	2010	2011	2012	2013e				2013e	2014f				2014f
					Q1	Q2	Q3	Q4		Q1	Q2	Q3	Q4	
Wage & Salary Employment (QCEW)	43,073	43,258	42,766	42,237	43,368	42,810	42,956	43,160	43,074	43,348	43,552	43,775	43,992	43,667
% change	1.3%	0.4%	-1.1%	-1.2%	9.6%	-5.1%	1.4%	1.9%	2.0%	1.7%	1.9%	2.0%	2.0%	1.4%
Total Employment (BEA)	66,940	69,006	67,665	66,739	66,999	67,042	67,072	67,117	67,058	67,169	67,229	67,298	67,378	67,269
% change	0.6%	3.1%	-1.9%	-1.4%	0.7%	0.3%	0.2%	0.3%	0.5%	0.3%	0.4%	0.4%	0.5%	0.3%
Proprietor Employment	9,215	9,209	9,320	9,517	9,630	9,672	9,708	9,736	9,687	9,758	9,776	9,794	9,815	9,786
% change	0.7%	-0.1%	1.2%	2.1%	1.9%	1.7%	1.5%	1.2%	1.8%	0.9%	0.7%	0.7%	0.9%	1.0%
Military Employment	12,275	14,185	13,312	12,558	12,692	12,737	12,778	12,816	12,756	12,851	12,883	12,913	12,940	12,897
% change	-2.2%	15.6%	-6.2%	-5.7%	1.6%	1.4%	1.3%	1.2%	1.6%	1.1%	1.0%	0.9%	0.8%	1.1%
Farm Employment	1,122	1,105	1,091	1,098	1,115	1,116	1,114	1,112	1,114	1,109	1,108	1,107	1,107	1,108
% change	-1.6%	-1.5%	-1.3%	0.7%	1.8%	0.4%	-0.7%	-0.7%	1.5%	-1.1%	-0.4%	-0.4%	0.0%	-0.6%
LAUS - Unemployment Rate (%)	5.5	6.5	6.4	6.6	6.5	6.7	6.3	6.4	6.5	6.1	5.8	5.5	5.2	5.7
% change	43.3%	18.4%	-0.4%	2.6%	4.0%	12.5%	-19.9%	6.7%	-1.8%	-20.7%	-20.7%	-20.0%	-18.7%	-12.6%
LAUS - Labor Force	47,643	49,340	48,279	47,773	48,052	47,715	47,699	47,736	47,801	47,563	47,443	47,335	47,246	47,397
% change	4.1%	3.6%	-2.1%	-1.0%	2.8%	-2.8%	-0.1%	0.3%	0.1%	-1.4%	-1.0%	-0.9%	-0.8%	-0.8%
LAUS - Number Unemployed	2,600	3,184	3,103	3,149	3,104	3,179	3,019	3,072	3,094	2,903	2,746	2,602	2,476	2,682
% change	49.2%	22.5%	-2.5%	1.5%	6.8%	9.7%	-20.1%	7.0%	-1.8%	-22.0%	-21.6%	-21.0%	-19.4%	-13.3%
LAUS - Employment	45,045	46,156	45,175	44,623	44,971	44,533	44,691	44,631	44,707	44,660	44,697	44,733	44,770	44,715
% change	2.3%	2.5%	-2.1%	-1.2%	3.1%	-3.9%	1.4%	-0.5%	0.2%	0.3%	0.3%	0.3%	0.3%	0.0%
Establishments	2,493	2,552	2,547	2,566	2,527	2,523	2,536	2,536	2,531	2,546	2,552	2,562	2,571	2,558
% change	0.2%	2.4%	-0.2%	0.7%	-6.4%	-0.6%	2.1%	0.0%	-1.4%	1.6%	0.9%	1.6%	1.4%	1.1%
Employees per Establishment	17.3	16.9	16.8	16.5	17.2	17.0	16.9	17.0	17.0	17.0	17.1	17.1	17.1	17.1
% change	1.1%	-1.9%	-0.9%	-2.0%	16.2%	-4.4%	-0.7%	1.9%	3.4%	0.1%	0.9%	0.5%	0.5%	0.3%
Personal Income (\$Mil)	4,227	4,532	4,645	4,664	4,696	4,740	4,808	4,896	4,785	4,995	5,092	5,179	5,246	5,128
% change	3.7%	7.2%	2.5%	0.4%	1.8%	3.7%	5.8%	7.3%	2.6%	8.1%	7.8%	6.8%	5.2%	7.2%
Real Personal Income (\$Mil)	1,970	2,078	2,065	2,029	2,021	2,035	2,052	2,080	2,047	2,112	2,143	2,170	2,188	2,153
% change	4.0%	5.5%	-0.6%	-1.8%	0.1%	2.8%	3.4%	5.4%	0.9%	6.1%	5.9%	5.0%	3.4%	5.2%
Per Capita Personal Income	35,238	36,132	36,933	36,905	37,036	37,313	37,806	38,404	37,640	39,074	39,733	40,296	40,711	39,954
% change	2.0%	2.5%	2.2%	-0.1%	1.2%	3.0%	5.3%	6.3%	2.0%	7.0%	6.7%	5.7%	4.1%	6.1%
Real Per Capita Personal Income	16,423	16,568	16,420	16,052	15,937	16,018	16,137	16,315	16,102	16,519	16,719	16,882	16,981	16,775
% change	2.3%	0.9%	-0.9%	-2.2%	-0.5%	2.0%	3.0%	4.4%	0.3%	5.0%	4.9%	3.9%	2.3%	4.2%
Share of OK PCPI (%)	90.9	90.7	89.0	86.6	85.2	85.2	85.6	86.3	85.6	86.7	87.3	87.7	87.7	87.3
% change	7.4%	-0.3%	-1.8%	-2.7%	-1.4%	-0.1%	2.1%	3.0%	-1.2%	2.0%	2.8%	1.5%	0.3%	2.1%
Wage & Salary Income (\$Thou)	1,432	1,487	1,508	1,502	1,581	1,609	1,611	1,656	1,614	1,674	1,711	1,738	1,774	1,724
% change	4.1%	3.8%	1.5%	-0.4%	21.1%	7.1%	0.6%	11.1%	7.4%	4.3%	8.9%	6.3%	8.1%	6.8%
Wage & Salary Income per Worker	33,235	34,370	35,272	35,570	36,443	37,577	37,507	38,363	37,473	38,611	39,288	39,705	40,314	39,480
% change	2.8%	3.4%	2.6%	0.8%	11.2%	12.4%	-0.7%	9.1%	5.4%	2.6%	7.0%	4.3%	6.1%	5.4%
Retail Sales (\$Thou)	1,190	1,243	1,219	1,267	1,294	1,200	1,231	1,282	1,252	1,281	1,298	1,309	1,323	1,303
% change	-0.1%	4.5%	-2.0%	3.9%	30.2%	-29.1%	10.5%	16.5%	-1.2%	-0.4%	5.5%	3.4%	4.1%	4.1%
Real Retail Sales (\$Thou)	554	570	542	551	557	515	526	545	536	541	546	549	552	547
% change	0.2%	2.8%	-5.0%	1.7%	28.4%	-30.0%	8.1%	14.6%	-2.8%	-2.4%	3.6%	1.6%	2.3%	2.1%
Retail Sales per Capita	9,917	9,915	9,693	10,023	10,204	9,445	9,682	10,056	9,847	10,019	10,128	10,187	10,264	10,150
% change	-1.7%	0.0%	-2.2%	3.4%	29.5%	-29.8%	10.0%	15.5%	-1.8%	-1.5%	4.4%	2.3%	3.0%	3.1%
Gross Domestic Product (\$Mil)	4,616	5,020	5,122	5,190	5,544	5,435	5,543	5,615	5,534	5,697	5,789	5,877	5,975	5,835
% change	4.4%	8.8%	2.0%	1.3%	24.9%	-7.9%	8.0%	5.2%	6.6%	5.8%	6.5%	6.1%	6.6%	5.4%
Real Gross Domestic Product (2005 \$)	4,074	4,348	4,305	4,502	4,781	4,682	4,761	4,807	4,758	4,856	4,914	4,970	5,032	4,943
% change	3.6%	6.7%	-1.0%	4.6%	23.7%	-8.3%	6.7%	3.9%	5.7%	4.0%	4.8%	4.5%	5.0%	3.9%
GDP per Worker	107,154	116,057	119,773	122,877	127,842	126,945	129,033	130,099	128,480	131,418	132,932	134,261	135,818	133,607
% change	3.1%	8.3%	3.2%	2.6%	15.0%	-2.8%	6.6%	3.3%	4.6%	4.1%	4.6%	4.0%	4.6%	4.0%
Population – Comanche County	119,952	125,408	125,753	126,390	126,799	127,028	127,173	127,491	127,123	127,827	128,166	128,509	128,851	128,338
% change	1.7%	4.5%	0.3%	0.5%	0.7%	0.7%	0.5%	1.0%	0.6%	1.1%	1.1%	1.1%	1.1%	1.0%

Nonfarm Wage and Salary Employment by Industry - Comanche County, Oklahoma

Industry Sector	2009	2010	2011	2012	2013e				2013e	2014f				2014f
					Q1	Q2	Q3	Q4		Q1	Q2	Q3	Q4	
Wage & Salary Employment (QCEW)	43,073	43,258	42,766	42,237	43,368	42,810	42,956	43,160	43,074	43,348	43,552	43,775	43,992	43,667
% change	1.3%	0.4%	-1.1%	-1.2%	9.6%	-5.1%	1.4%	1.9%	2.0%	1.7%	1.9%	2.0%	2.0%	1.4%
Private	29,334	29,075	28,884	28,377	29,397	29,007	29,186	29,360	29,238	29,531	29,717	29,918	30,115	29,820
% change	-0.6%	-0.9%	-0.7%	-1.8%	14.1%	-5.3%	2.5%	2.4%	3.0%	2.3%	2.5%	2.7%	2.6%	2.0%
GOODS-PRODUCING														
Goods-Producing	5,338	5,550	5,556	5,532	5,423	5,407	5,412	5,436	5,420	5,455	5,470	5,485	5,502	5,478
% change	-0.9%	4.0%	0.1%	-0.4%	-7.2%	-1.2%	0.4%	1.8%	-2.0%	1.4%	1.1%	1.1%	1.2%	1.1%
Forestry, Fishing, Logging, Ag	47	58	33	38	45	42	43	45	44	46	46	47	48	47
% change	-28.4%	23.3%	-43.3%	15.9%	61.5%	-26.7%	9.5%	18.6%	14.4%	8.9%	0.0%	8.7%	8.5%	6.9%
Mining	121	115	145	131	109	114	111	108	111	109	107	107	106	107
% change	0.2%	-4.8%	26.1%	-9.3%	-39.7%	18.3%	-10.5%	-10.8%	-15.8%	3.7%	-7.3%	0.0%	-3.7%	-2.9%
Construction	1,721	1,828	1,776	1,827	1,705	1,683	1,683	1,700	1,693	1,710	1,722	1,732	1,742	1,727
% change	3.3%	6.2%	-2.8%	2.9%	-38.0%	-5.2%	0.0%	4.0%	-7.3%	2.4%	2.8%	2.3%	2.3%	2.0%
Manufacturing	3,449	3,549	3,602	3,535	3,564	3,568	3,576	3,583	3,573	3,589	3,594	3,600	3,606	3,597
% change	-2.5%	2.9%	1.5%	-1.9%	9.9%	0.4%	0.9%	0.8%	1.1%	0.7%	0.6%	0.7%	0.7%	0.7%
SERVICE-PROVIDING														
Service-Providing	23,996	23,526	23,328	22,845	23,974	23,600	23,774	23,923	23,818	24,076	24,248	24,433	24,613	24,343
% change	-0.6%	-2.0%	-0.8%	-2.1%	19.3%	-6.2%	2.9%	2.5%	4.3%	2.6%	2.9%	3.1%	2.9%	2.2%
Wholesale & Retail Trade	5,931	5,707	5,678	5,693	5,726	5,891	5,908	5,914	5,860	5,918	5,924	5,932	5,940	5,929
% change	-2.4%	-3.8%	-0.5%	0.3%	4.2%	11.5%	1.2%	0.4%	2.9%	0.3%	0.4%	0.5%	0.5%	1.2%
Transportation & Utilities	1,335	1,381	1,278	1,188	1,279	1,352	1,370	1,384	1,346	1,384	1,383	1,381	1,379	1,382
% change	-4.3%	3.5%	-7.4%	-7.0%	7.6%	22.8%	5.3%	4.1%	13.3%	0.0%	-0.3%	-0.6%	-0.6%	2.6%
Information	721	558	504	540	528	567	540	548	546	550	549	552	553	551
% change	19.5%	-22.7%	-9.6%	7.2%	-4.5%	29.5%	-19.0%	5.9%	1.1%	1.5%	-0.7%	2.2%	0.7%	1.0%
Financial Activities	2,690	2,592	2,505	2,294	2,302	2,225	2,220	2,225	2,243	2,235	2,245	2,257	2,268	2,251
% change	-1.5%	-3.6%	-3.4%	-8.4%	13.3%	-13.4%	-0.9%	0.9%	-2.2%	1.8%	1.8%	2.1%	1.6%	0.4%
Professional & Business Services	3,844	3,585	3,869	3,776	4,520	4,050	4,145	4,198	4,228	4,260	4,332	4,410	4,486	4,372
% change	-1.4%	-6.8%	7.9%	-2.4%	66.9%	-41.6%	9.4%	5.1%	12.0%	5.9%	6.8%	7.2%	6.9%	3.4%
Education & Health Services	4,049	3,883	3,782	3,900	4,070	4,081	4,088	4,123	4,091	4,158	4,206	4,254	4,299	4,229
% change	-0.6%	-4.1%	-2.6%	3.1%	23.3%	1.1%	0.7%	3.4%	4.9%	3.4%	4.6%	4.6%	4.2%	3.4%
Leisure & Hospitality	4,757	5,062	4,979	4,797	4,879	4,830	4,872	4,910	4,873	4,943	4,978	5,015	5,052	4,997
% change	5.2%	6.4%	-1.7%	-3.6%	5.5%	-4.0%	3.5%	3.1%	1.6%	2.7%	2.8%	3.0%	3.0%	2.5%
Other Services	669	760	736	657	671	605	631	623	633	629	630	633	636	632
% change	-19.5%	13.6%	-3.2%	-10.7%	9.1%	-39.3%	17.2%	-5.1%	-3.7%	3.9%	0.6%	1.9%	1.9%	-0.1%
GOVERNMENT														
Civilian Government	13,739	14,183	13,882	13,861	13,971	13,803	13,770	13,801	13,836	13,817	13,835	13,856	13,877	13,846
% change	5.5%	3.2%	-2.1%	-0.2%	0.4%	-4.8%	-1.0%	0.9%	-0.2%	0.5%	0.5%	0.6%	0.6%	0.1%
Federal Government	4,030	4,714	4,538	4,452	4,459	4,297	4,229	4,208	4,298	4,184	4,161	4,138	4,116	4,150
% change	8.2%	17.0%	-3.7%	-1.9%	-3.6%	-14.5%	-6.3%	-2.0%	-3.5%	-2.3%	-2.2%	-2.2%	-2.1%	-3.5%
State & Local Government	9,709	9,469	9,344	9,408	9,511	9,506	9,541	9,592	9,538	9,633	9,674	9,718	9,761	9,697
% change	4.4%	-2.5%	-1.3%	0.7%	2.3%	-0.2%	1.5%	2.1%	1.4%	1.7%	1.7%	1.8%	1.8%	1.7%
State Government	1,472	1,408	1,352	1,414	1,449	1,525	1,511	1,517	1,501	1,520	1,524	1,527	1,531	1,526
% change	0.2%	-4.3%	-4.0%	4.6%	-2.7%	21.0%	-3.7%	1.6%	6.2%	0.8%	1.1%	0.8%	1.0%	1.7%
Local Government	8,237	8,061	7,992	7,995	8,062	7,981	8,030	8,076	8,037	8,113	8,150	8,191	8,230	8,171
% change	5.2%	-2.1%	-0.9%	0.0%	3.2%	-4.0%	2.5%	2.3%	0.5%	1.8%	1.8%	2.0%	1.9%	1.7%
Industry Sector	2009	2010	2011	2012	2013e				2013e	2014f				2014f