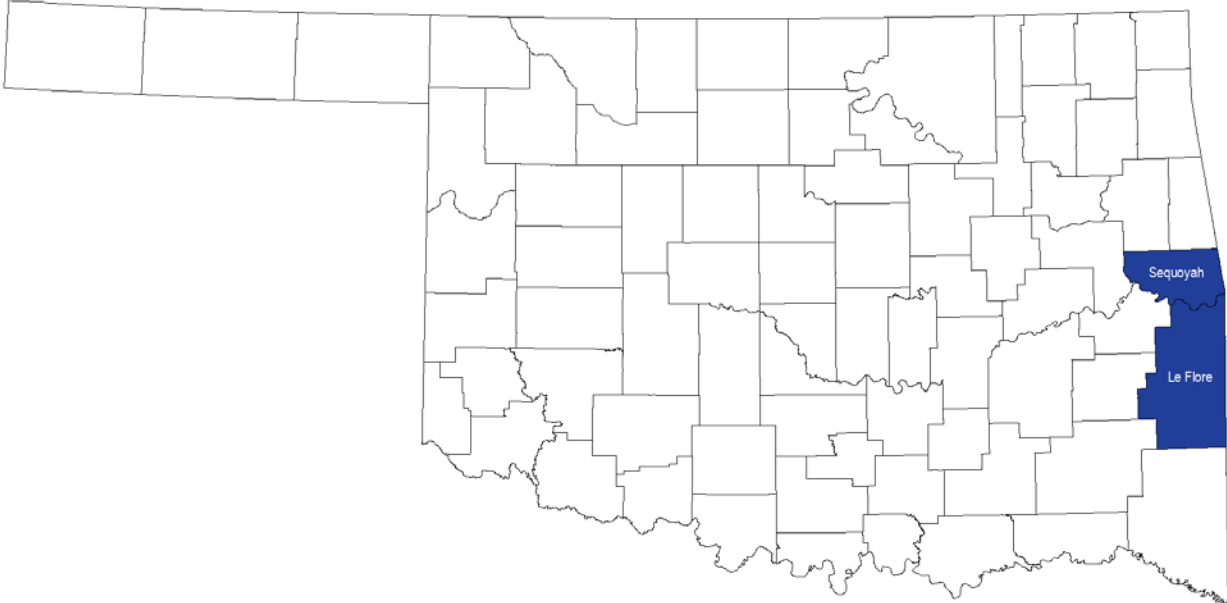


FORT SMITH METROPOLITAN STATISTICAL AREA



2023 LOCAL BRIEFING

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Table of Contents

Introduction.....	5
Population.....	5
Population by County	7
Population by Age.....	7
Population by Race and Ethnicity	9
Education	10
Educational Attainment.....	10
Educational Attainment by Race and Ethnicity	11
Educational Assets.....	12
Labor Force	12
Labor Force Participation by County	12
Median Earnings	13
Commuter Data	14
Top Industries by Total Jobs	15
Key Sectors	15
Key Sector Staffing Patterns	15
Summary	16
Appendix.....	17
Educational Assets.....	17
Key Industries	18
Key Occupations	19
Industry Employment Projections	21

Tables

Table 1: Population by County.....	6
Table 2: Projected Population by County	6
Table 3: Population by Age	8
Table 4: Population by Race and Ethnicity	9
Table 5: Educational Attainment	10
Table 6: Labor Force Participation Rate by County	13
Table 7: Top Industries by Total Jobs.....	15
Table 8: Educational Assets	17
Table 9: Industry Location Quotients (LQ).....	18
Table 10: Occupation Location Quotients (LQ).....	19
Table 11: 2020-2030 Industry Employment Projections	21

Figures

Figure 1: Population by County	5
Figure 2: Population by Age	7
Figure 3: Population by Race and Ethnicity	8
Figure 4: Educational Attainment	10
Figure 5: Educational Attainment by Race and Ethnicity	11
Figure 7: Labor Force Participation Rate by County	12
Figure 8: Median Earnings by County	13
Figure 9: Local Area Commuter Patterns	14

Introduction

The Fort Smith Metropolitan Statistical Area (MSA) is five-county area comprised of three Arkansas counties and two Oklahoma counties (Le Flore and Sequoyah). According to the U.S. Census Bureau, the combined region of Oklahoma covers approximately 2,312 square miles and is home to nearly 90,000 residents. Le Flore County, the 6th largest county by land area in Oklahoma constitutes 69 percent of the Oklahoma portion of the Fort Smith MSA. Sequoyah County, with the remaining 31 percent of the area, is the smaller of the two counties. The following reviews the population, education, labor force, top industries by total jobs, and staffing patterns of state key industry sectors.

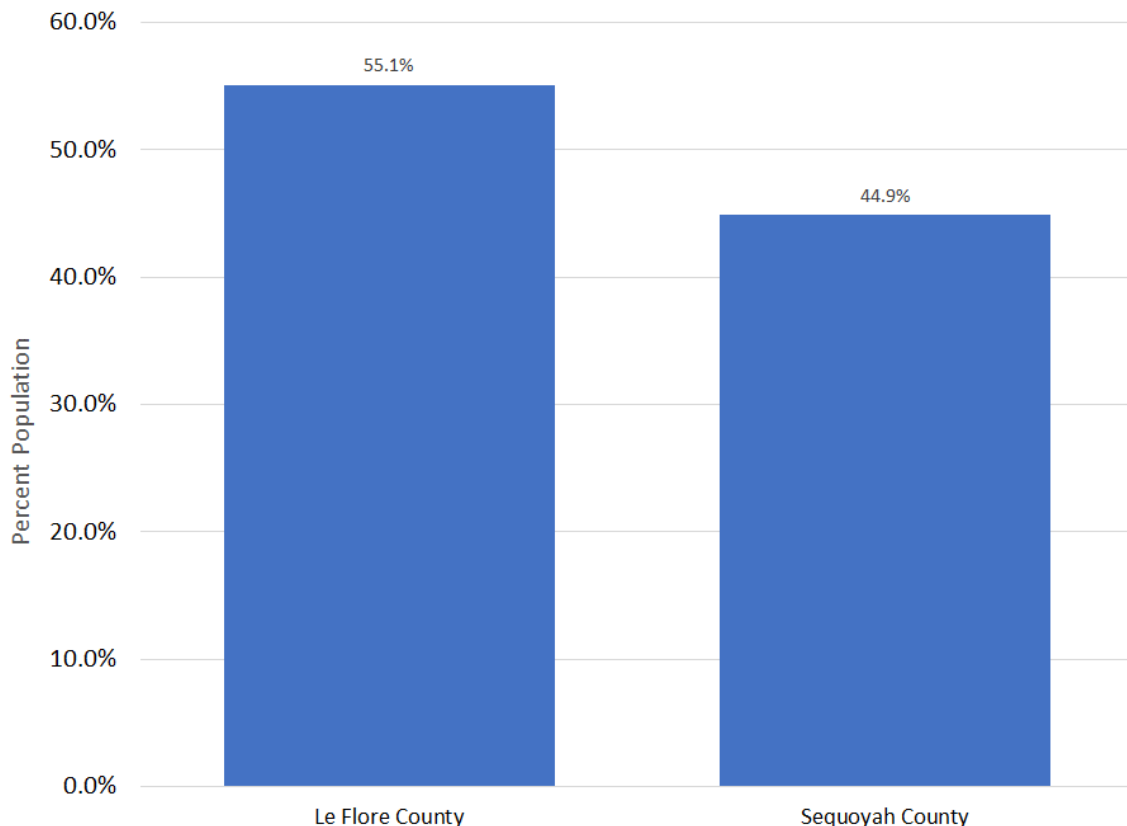
Population

Between 2017 and 2022, the Oklahoma portion of the Fort Smith MSA declined by approximately 3.5 percent, from 91,224 to 88,063, or around 3,161 fewer people. Between 2020 and 2030, the area is expected to grow by an additional 2.0 percent to 89,130 people. The following shows population figures and analyses by county, age, race, and ethnicity in the Oklahoma portion of the Fort Smith MSA.

Population by County

Figure 1 shows the Oklahoma portion of the Fort Smith MSA population breakdown by county. Le Flore County had the largest share, representing 55.1 percent of the population in the area, with Sequoyah County contributing the remaining 44.9 percent.

Figure 1: Population by County



SOURCE: U.S. Census Bureau. 2022 American Community Survey, ACS 5-Year Estimates.

Table 1 provides the change in Oklahoma portion of the Fort Smith MSA population by county from 2017 to 2022. During this period, both counties population decline. Sequoyah County's population contracted by the most people during this period declining 1,826 people (-4.4 percent) in 2022. Le Flore County population decreased by 1,335 people (-2.7 percent).

Table 1: Population by County

County	2017 Population	2022 Population	Total Change	Percent Change
Le Flore County, Oklahoma	49,860	48,525	-1,335	-2.7%
Sequoyah County, Oklahoma	41,364	39,538	-1,826	-4.4%
Total	91,224	88,063	-3,161	-3.5%

SOURCE: U.S. Census Bureau. American Community Survey, ACS 5-Year Estimates.

Table 2 shows the projected population change from 2020 to 2030 by county. During this period, both counties in the Oklahoma portion of the Fort Smith MSA are projected to grow in population. Sequoyah County is projected to have the largest increase in population at 964 (2.5 percent) additional people by 2030. Le Flore County is projected to add 756 people (1.6 percent).

Table 2: Projected Population by County

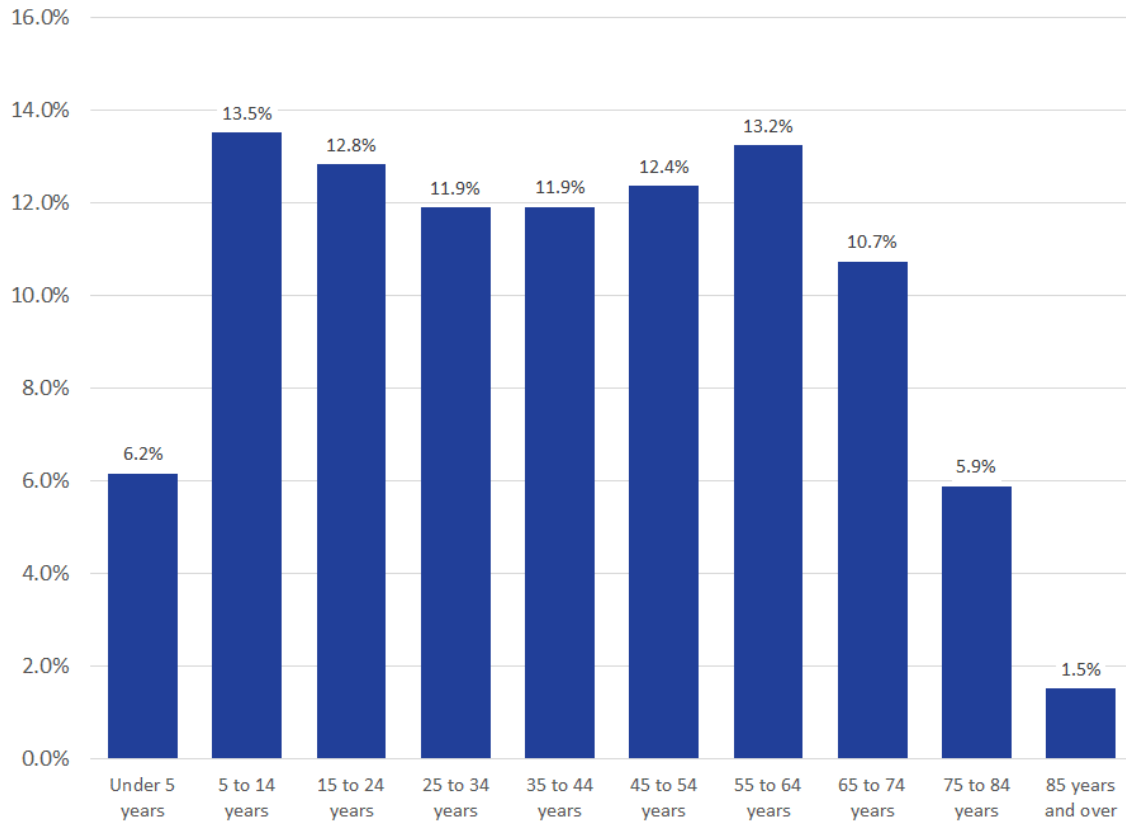
County	2020 Population	2030 Population	Total Change	Percent Change
Le Flore County, Oklahoma	48,129	48,885	756	1.6%
Sequoyah County, Oklahoma	39,281	40,245	964	2.5%
Total	87,410	89,130	1,720	2.0%

SOURCE: Oklahoma Department of Commerce. Oklahoma Population Projections, 2030 to 2070. March 2023.

Population by Age

Figure 2 below shows the population by age in the Oklahoma portion of the Fort Smith MSA. In 2022, the 5- to 14- and 55- to 64-year old age groups represented the largest age groups at 13.5 percent and 13.2 percent respectively. The next largest age group was 15- to 24-year old at 12.8 percent. Those aged 85 and over represent the smallest age group in the Oklahoma portion of the Fort Smith MSA at 1.5 percent.

Figure 2: Population by Age



SOURCE: U.S. Census Bureau. 2022 American Community Survey, ACS 5-Year Estimates.

Table 3, on the next page, provides the population change by age group from 2017 to 2022. During this period, every age group under 65 years old declined in population. The largest decline was seen in the 45- to 54-year old age group, decreasing 1,302 (-10.7 percent), followed by 35- to 44-year old group declining by 632 (-5.7 percent). The 75- to 84-year old age group added the most people at 240 (4.9 percent) while 65- to 74-year olds were next at 74 (0.8 percent).

Table 3: Population by Age

Age	2017 Population	2022 Population	Total Change	Percent Change
Under 5 years	5,440	5,427	-13	-0.2%
5 to 14 years	12,314	11,895	-419	-3.4%
15 to 24 years	11,618	11,286	-332	-2.9%
25 to 34 years	10,783	10,473	-310	-2.9%
35 to 44 years	11,112	10,480	-632	-5.7%
45 to 54 years	12,182	10,880	-1,302	-10.7%
55 to 64 years	11,936	11,656	-280	-2.3%
65 to 74 years	9,373	9,447	74	0.8%
75 to 84 years	4,943	5,183	240	4.9%
85 years and over	1,523	1,336	-187	-12.3%
Total	91,224	88,063	-3,161	-3.5%

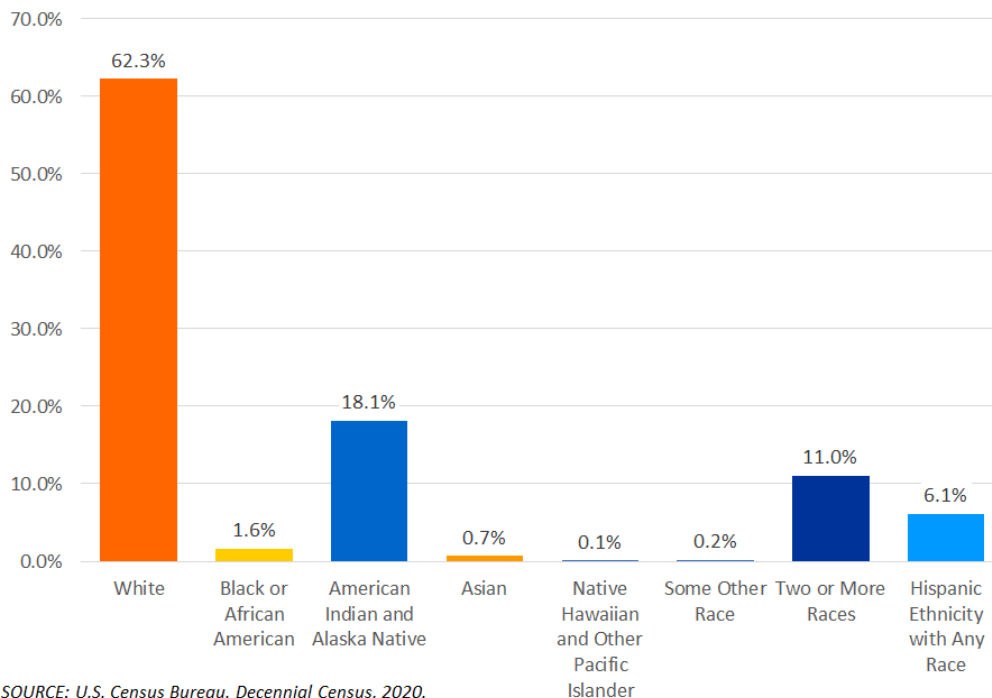
SOURCE: U.S. Census Bureau. American Community Survey, ACS 5-Year Estimates.

Population by Race and Ethnicity

The following analyses uses the racial and ethnicity categories designated by the U.S. Census Bureau which categorizes “Hispanic Origin” as an ethnicity rather than a race. People who identify as Hispanic, Latino, or Spanish may be any race. As such, Hispanic is always reported in conjunction with another racial designator, i.e., “Black or African American, Hispanic.” Unless otherwise noted, individual races included in this briefing section were reported as non-Hispanic.

Figure 3 summarizes the Oklahoma portion of Fort Smith MSA population by race and ethnicity in 2020. White made up the largest percentage of the population at 62.3 percent, followed by American Indian and Alaska Native at 18.1 percent. Native Hawaiian or Pacific Islander was the smallest at 0.1 percent).

Figure 3: Population by Race and Ethnicity



SOURCE: U.S. Census Bureau. Decennial Census, 2020.

Table 4 provides the population change by demographic group for the Oklahoma portion of Fort Smith MSA from 2017 to 2021. During this period, most demographic groups grew in population. Hispanic Ethnicity with Any Race and American Indian and Alaska Native added the most population during this period at 614 (12.3 percent) and 489 (3.8 percent) additional people by 2022, respectively. Some Other Race was the fastest growing demographic segment jumping 1,262.5 percent. The White segment of the population saw the largest decline during this period, contracting by 4,361 people (-7.0 percent).

Table 4: Population by Race and Ethnicity

Demographic	2017 Population	2021 Population	Total Change	Percent Change
White	62,134	57,773	-4,361	-7.0%
Black or African American	1,900	1,573	-327	-17.2%
American Indian and Alaska Native	12,853	13,342	489	3.8%
Asian	491	673	182	37.1%
Native Hawaiian and Other Pacific Islander	64	28	-36	-56.3%
Some Other Race	8	109	101	1262.5%
Two or More Races	8,766	8,943	177	2.0%
Hispanic Ethnicity with Any Race	5,008	5,622	614	12.3%
Total	91,224	88,063	-3,161	-3.5%

SOURCE: U.S. Census Bureau. American Community Survey, ACS 5-Year Estimates.

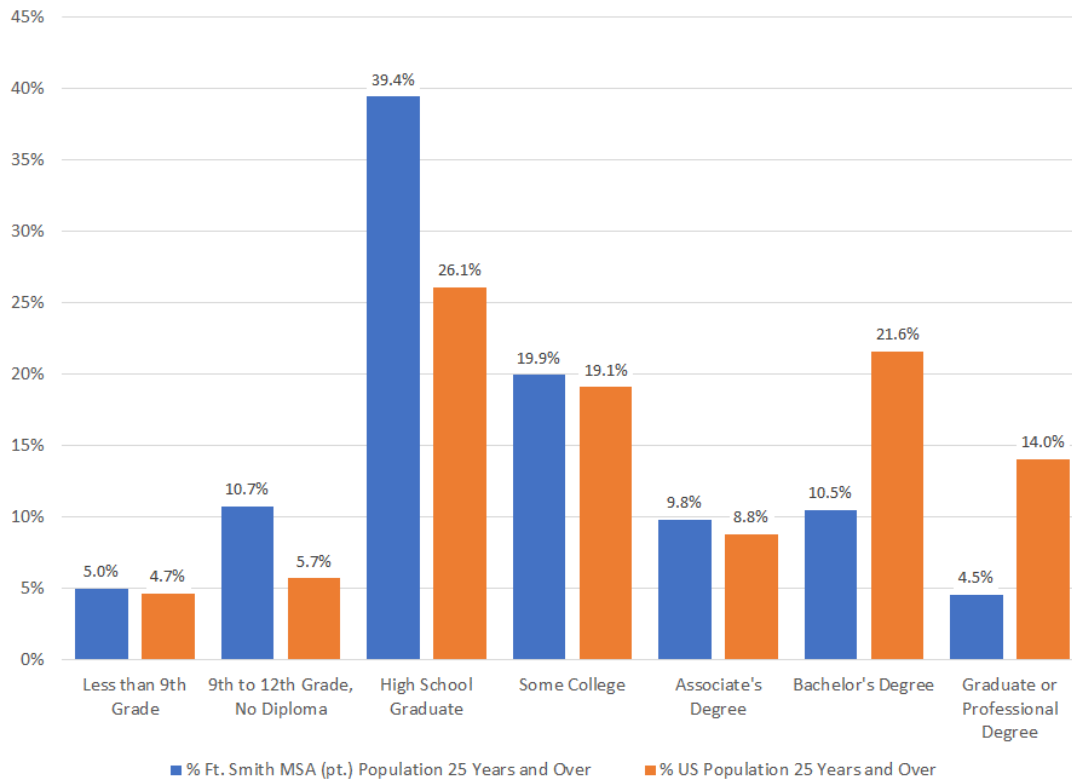
Education

Colleges, universities, career technology centers, and K-12 schools are instrumental in developing the workforce. Educational institutions help supply local businesses and organizations with a workforce with the necessary education and skills to be competitive in today’s economy. The following section reviews the Oklahoma portion of the Fort Smith MSA’s educational attainment and provides an educational attainment mismatch analysis, and details the State’s educational assets.

Educational Attainment

Figure 4 compares the Oklahoma portion of the Fort Smith MSA’s educational attainment levels with the United States educational attainment levels in 2022. High School Graduates made up the largest share of the population at 39.4 percent. This was 13.3 percentage points higher than the U.S. average of 26.1 percent. The second largest level of education was Some College at 19.9 percent. Those with a Graduate or Professional Degree represented the smallest group at 4.5 percent, 9.5 percentage point below the national average of 14.0 percent.

Figure 4: Educational Attainment



SOURCE: U.S. Census Bureau. 2022 American Community Survey, ACS 5-Year Estimates.

Table 5, below, provides the change in educational attainment levels in the Oklahoma portion of the Fort Smith MSA from 2017 to 2022. By 2022, more people achieved higher levels of education than in 2017, while fewer people had below high school graduate. In particular, those with Associate’s and Bachelor’s Degrees grew the most during this period adding 389 and 347 more people respectively. Some College was next with an additional 232 people by 2022. Alternatively, only a combined 1,866 fewer people had an education below the High School Graduate level by 2022.

Table 5: Educational Attainment

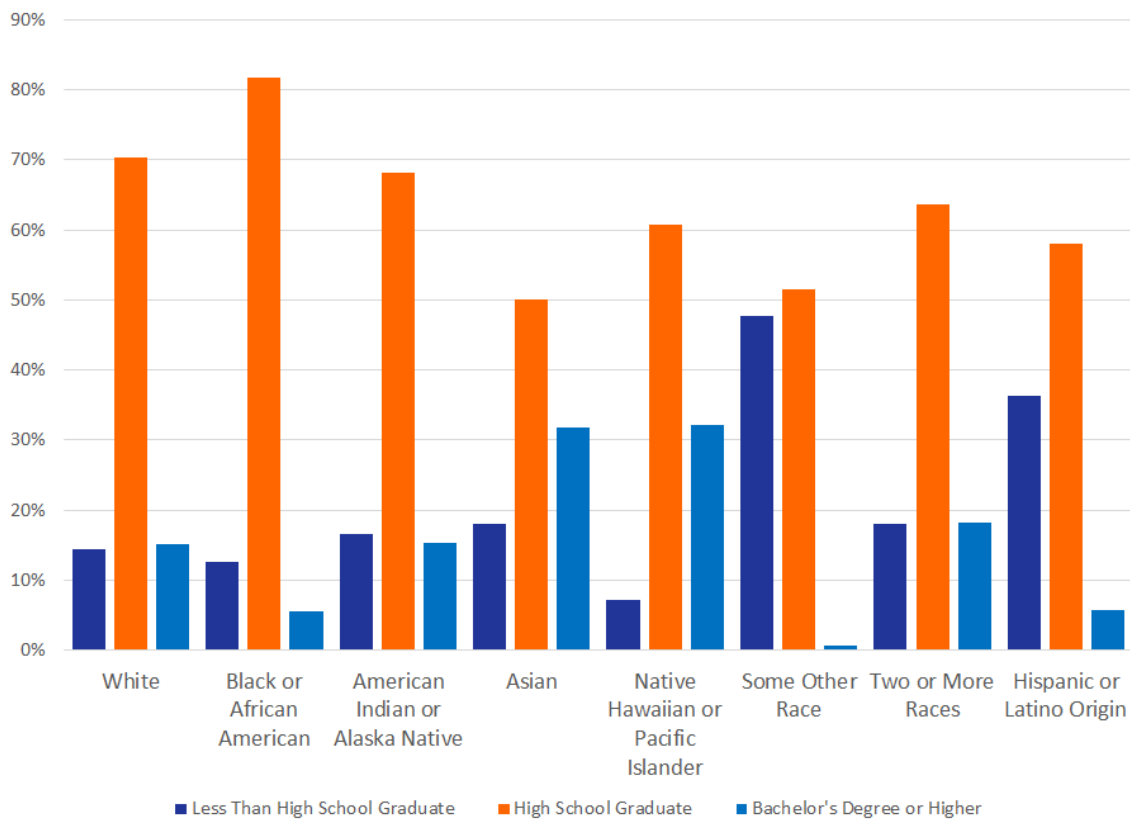
Educational Attainment	2017 Population	2022 Population	Total Change	Percent Change
Less than 9th Grade	3,541	2,974	-567	-16.0%
9th to 12th Grade, No Diploma	7,687	6,388	-1,299	-16.9%
High School Graduate	24,651	23,430	-1,221	-5.0%
Some College	11,620	11,852	232	2.0%
Associate's Degree	5,461	5,850	389	7.1%
Bachelor's Degree	5,913	6,260	347	5.9%
Graduate or Professional Degree	2,979	2,701	-278	-9.3%
Total	61,852	59,455	-2,397	-3.9%

SOURCE: U.S. Census Bureau. American Community Survey, ACS 5-Year Estimates.

Educational Attainment by Race and Ethnicity

Figure 5 shows the Oklahoma portion of the Fort Smith MSA education attainment levels by race and ethnicity in 2022. Across all racial and ethnic groups, High School Graduate represented the largest percentage of the respective population groups. Black or African American and White had the largest population percentage at the High School Graduate level at 81.8 percent and 70.3 percent respectively. Native Hawaiian or Pacific Islander and Asian had the largest population percentage at the Bachelor's Degree or Higher level at 32.1 percent and 31.8 percent respectively.

Figure 5: Educational Attainment by Race and Ethnicity



SOURCE: U.S. Census Bureau. 2022 American Community Survey, ACS 5-Year Estimates.

Educational Assets

The Oklahoma portion of the Fort Smith MSA has 5 distinct post-secondary educational institutions, ranging from universities, technical colleges, community colleges, and specialty training schools. These institutions are important educational and professional assets as they help connect students of all backgrounds and circumstances with resources, degrees, certifications, and higher knowledge. Table 8 in the Appendix details accredited institutions and their programs of study.

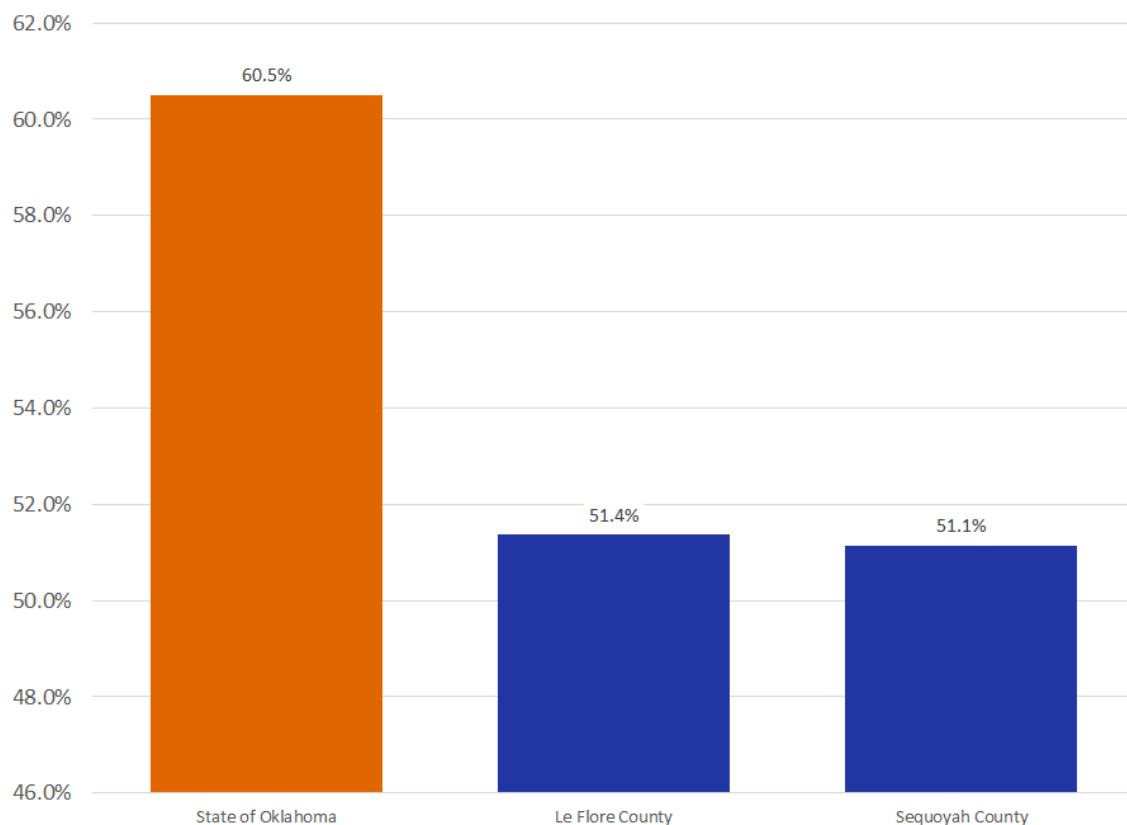
Labor Force

The labor force may be considered one of the foremost assets of a particular region, providing key goods and services, collaborating across industries, and participating in economic and skills development. The following section reviews the Oklahoma portion of Fort Smith MSA's labor force participation rates broken down by county, median earnings, as well as commuter data detailing inflow, outflow, and circulation.

Labor Force Participation by County

Figure 7 shows the Oklahoma portion of Fort Smith MSA labor force participation rate (LFPR) by county. In 2022, neither of the two counties in the Oklahoma portion of Fort Smith MSA met the Oklahoma state average labor force participation rate of 60.5 percent. Le Flore County's LFPR of 51.4 percent was slightly higher than Sequoyah County at 51.1 percent.

Figure 7: Labor Force Participation by County, 2022



Source: U.S. Census Bureau. American Community Survey (ACS), 2022 5-Year Estimates.

Table 6, below, shows the labor force participation rate by county for the Oklahoma portion of Fort Smith MSA from 2021 to 2022. During this period, Sequoyah County’s labor force participation rate improved 0.2 percentage point to 51.1 percent, while Le Flore County held steady at 51.4 percent. During the same period, the statewide LFPR declined 0.3 percentage point to 60.8 percent.

Table 6: Labor Force Participation by County

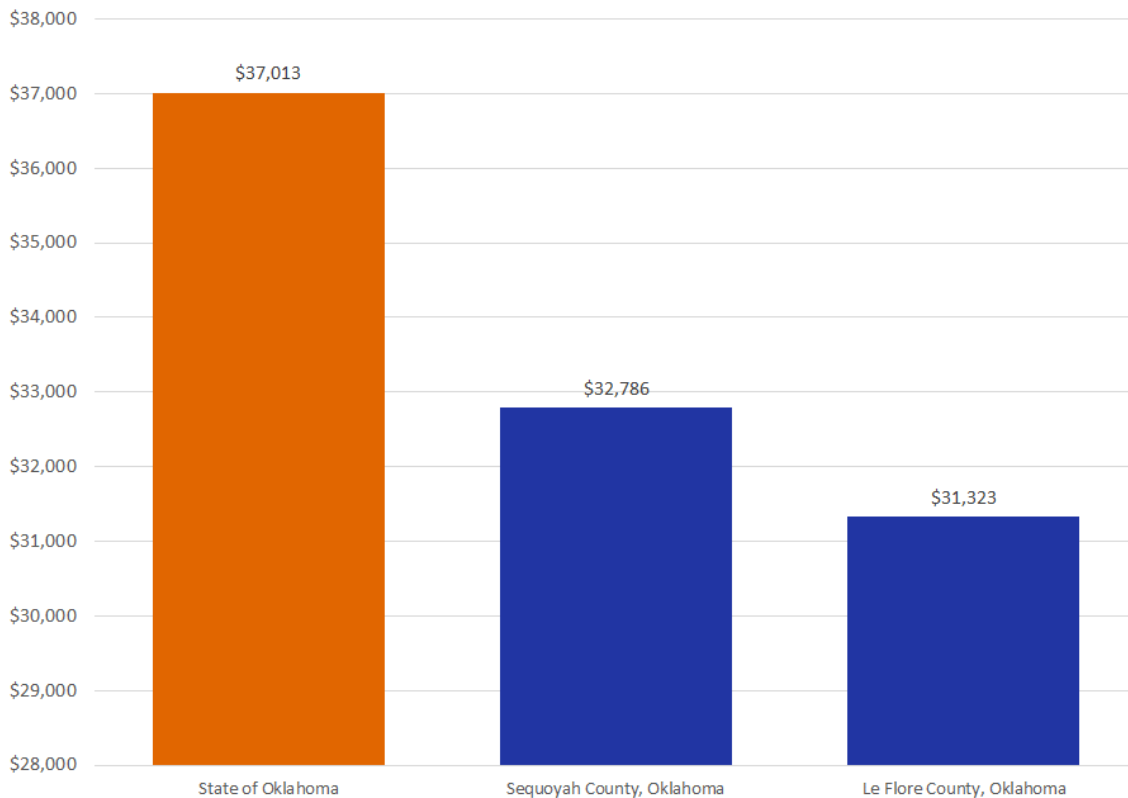
Area	LFPR 2021	LFPR 2022	Total Change
State of Oklahoma	60.8%	60.5%	-0.3%
Le Flore County	51.4%	51.4%	0.0%
Sequoyah County	51.0%	51.1%	0.2%

Source: U.S. Census Bureau. American Community Survey (ACS), 5-Year Estimates.

Median Earnings

Figure 8 provides the median earnings of those that are over the age of 16 in each of the counties in the Oklahoma portion of Fort Smith MSA and the State of Oklahoma in 2022. The highest earnings were found in Sequoyah County at \$32,786, followed by Le Flore County at \$31,323. Neither of the counties in the Oklahoma portion of Fort Smith MSA median earnings were well below those found at the state level of \$37,013.

Figure 8: Median Earnings by County, 2022

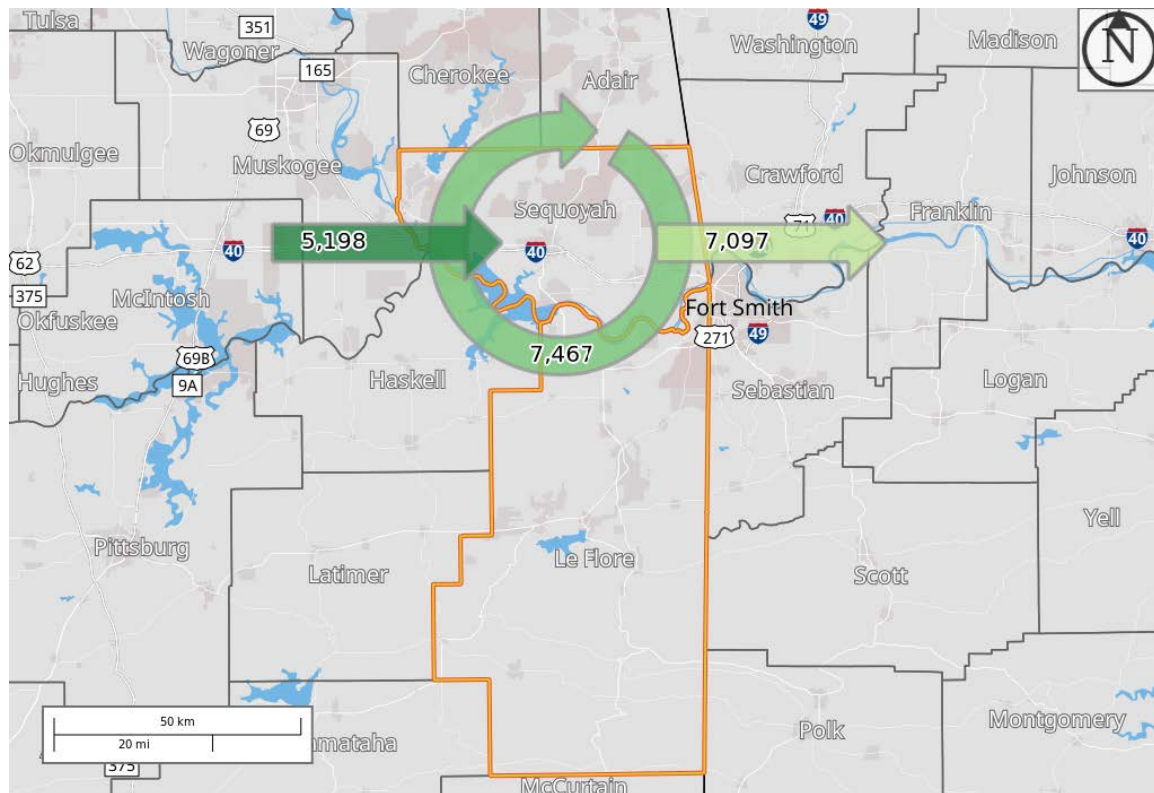


Source: U.S. Census Bureau. American Community Survey (ACS), 2022 5-Year Estimates.

Commuter Data

The U.S. Census Bureau Longitudinal Employer-Household Dynamics (LEHD) program uses data from a variety of sources including the unemployment insurance program, Quarterly Census of Employment and Wages (QCEW), and administrative data from censuses and surveys to create models estimating worker commutes for primary employment. In 2021, 5,198 (41.0 percent) worked in the Oklahoma portion of Fort Smith MSA and did not live there, 7,467 lived and worked in the Oklahoma portion of Fort Smith MSA, and 7,097 (48.7 percent) lived in the Oklahoma portion of Fort Smith MSA and worked outside the area. See Figure 9 below.

Figure 9: Commuter Patterns



Source: U.S. Census Bureau, Longitudinal-Employer Household Dynamics Program (LEHD), 2021, <https://onthemap.ces.census.gov>.

Top Industries by Total Jobs

The North American Industry Classification System (NAICS) is the standard utilized by federal agencies to classify businesses to collect, analyze, and publish statistical data related to the United States business economy. Several of the analyses that follow are based upon data using NAICS employment sector codes. The following information is provided to enhance understanding of the framework of these analyses.

NAICS uses a 6-digit coding system which is structured hierarchically, beginning with 20 broad economic sectors. Over 1,000 industries are then sub-categorized within these 20 sectors. Each industry within a sector shares distinguishing economic activities. The most recent version of the classification system was implemented in 2017. Additional information is available at: www.census.gov/eos/www/naics.

Table 7, below, shows the top ten industries in the Oklahoma portion of Fort Smith MSA by the total number of jobs in 2022. There was an estimated 21,436 number of total jobs in 2022. The largest sector was Government with 7,569 jobs. The second largest sector was Retail Trade with 3,026 jobs, followed by Accommodation and Food Services with 1,655 jobs and Manufacturing at 1,629 jobs. The tenth largest sector was Wholesale Trade with 362 jobs. Together, these industries made up 80.2 percent of the total jobs in the area.

Table 7: Top Industries by Total Jobs

NAICS Code	Industry Description	2022 Jobs	Percentage of Total Employment
90	Government	7,569	35.3%
44-45	Retail Trade	3,026	14.1%
72	Accommodation and Food Services	1,655	7.7%
31-33	Manufacturing	1,629	7.6%
54	Professional, Scientific, and Technical Services	753	3.5%
23	Construction	722	3.4%
52	Finance and Insurance	683	3.2%
48-49	Transportation and Warehousing	436	2.0%
21	Mining, Quarrying, and Oil and Gas Extraction	362	1.7%
42	Wholesale Trade	362	1.7%

SOURCE: Quarterly Census of Employment and Wages (QCEW), Bureau of Labor Statistics.

Key Sectors

This section will provide both data and analysis of key industries and occupations in Oklahoma using official labor market statistics from the Oklahoma Employment Security Commission (OESC), the U.S. Bureau of Labor Statistics (BLS), and the Census Bureau.

It is well understood that some industries are more heavily concentrated in some geographic areas than in others as individual firms have realized advantages in being close to competitors, customers, supply chain sources, etc. Knowing this policy makers can profit by understanding the long-standing (and perhaps even the emerging) economic geography of their state and sub-state regions. Using location quotients, we can identify those industries and occupation that already exist and are thriving within our state.

Utilizing 4-digit NAICS codes we have identified industries with at least 500 employees within the private and federal government sectors that have an employment concentration that is at least twice that of the nation. Table 9 in the Appendix outlines the top 4-digit NAICS industries in Oklahoma based on location quotients.

Key Occupations

Table 10 in the Appendix shows similar employment concentration data but from an occupational perspective. Here we are illustrating occupations that have LQs of at least 3.0 and at least 100 employees.

Long Term Industry Employment Projections

Next, we transition to looking at the industry and occupational projections produced by the OESC's Economic Research & Analysis division in partnership with the U.S. Department of Labor (see Table 11 in the Appendix). These data products are produced every-other year in accordance with national standards. They provide labor market participants with an informed guide of how current trends may play out over the next decade.

Summary

This local briefing reviewed Oklahoma portion of Fort Smith MSA's population, educational attainment and assets, labor force information, top industry data, and key sectors. The Oklahoma portion of Fort Smith MSA is one of five Metropolitan Statistical Areas (MSAs) in Oklahoma. The Oklahoma Employment Security Commission prepares briefings for each of the Metropolitan Statistical Areas and four Nonmetropolitan Areas, including a state-level briefing.

Table 8: Educational Assets

Institution Name	Institution Type	City	County	Area	Degree Types
Carl Albert State College	Public	Poteau	Le Flore	Ft. Smith MSA	Associate, Certificate
Carl Albert State College	Public	Sallisaw	Sequoyah	Ft. Smith MSA	Associate, Certificate
Kiamichi Technology Center	Technical School	Poteau	Le Flore	Ft. Smith MSA	Certificate
Kiamichi Technology Center	Technical School	Spiro	Le Flore	Ft. Smith MSA	Certificate
Kiamichi Technology Center	Technical School	Talihina	Le Flore	Ft. Smith MSA	Certificate

SOURCE: Oklahoma State Regents of Higher Education, CareerTech.org.

Key Industries

Table 9: Industry Location Quotients (LQ)

NAICS Code	Industry Title	2022 Average Employment	2022 Average Annual Earnings	Employment LQ
Aerospace and Defense Industries				
3329	Other Fabricated Metal Product Manufacturing - Federal Government	1,634	\$67,581	39.24
9281	National Security and International Affairs	21,590	\$79,377	3.38
3364	Aerospace Product and Parts Manufacturing	11,690	\$96,525	2.16
6211	Offices of Physicians - Federal Government	693	\$91,330	2.56
Energy Industries				
4869	Other Pipeline Transportation	1,275	\$156,838	14.47
2111	Oil and Gas Extraction	11,965	\$159,860	9.8
4862	Pipeline Transportation of Natural Gas	2,248	\$118,726	6.58
2131	Support Activities for Mining	16,315	\$84,665	5.75
Agribusiness and Biosciences Industries				
1122	Hog and Pig Farming	1,636	\$49,110	5.21
4245	Farm Product Raw Material Merchant Wholesalers	1,960	\$39,219	2.59
3111	Animal Food Manufacturing	1,851	\$64,187	2.39
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	870	\$114,517	2.14
3116	Animal Slaughtering and Processing	11,834	\$49,125	2.06
Manufacturing Industries				
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	6,429	\$58,148	4.18
3324	Boiler, Tank, and Shipping Container Manufacturing	4,094	\$76,039	4.11
3274	Lime and Gypsum Product Manufacturing	607	\$68,555	3.62
3262	Rubber Product Manufacturing	4,931	\$70,199	3.39
3331	Agriculture, Construction, and Mining Machinery Manufacturing	7,493	\$72,907	3.27
3312	Steel Product Manufacturing from Purchased Steel	1,567	\$73,056	2.58
3221	Pulp, Paper, and Paperboard Mills	2,385	\$80,124	2.49
3352	Household Appliance Manufacturing	1,785	\$47,029	2.37
3271	Clay Product and Refractory Manufacturing	926	\$53,039	2.35

Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW).

Key Occupations

Table 10: Employment Location Quotients (LQ)

SOC Code	Occupational Title	2022 Employment	2022 Annual Average Wage	Employment LQ
33-9031	Gambling Surveillance Officers and Gambling Investigators	1,700	\$31,310	14.94
47-5012	Rotary Drill Operators, Oil and Gas	1,770	\$56,380	13.37
43-3041	Gambling Cage Workers	1,310	\$25,740	10.27
41-2012	Gambling Change Persons and Booth Cashiers	1,870	\$26,400	9.16
47-5032	Explosives Workers, Ordnance Handling Experts, and Blasters	420	\$50,890	8.18
47-5071	Roustabouts, Oil and Gas	3,370	\$44,660	7.94
47-5013	Service Unit Operators, Oil and Gas	2,730	\$56,330	6.92
17-2171	Petroleum Engineers	1,470	\$144,160	6.62
17-2021	Agricultural Engineers	110	\$62,890	6.56
51-8093	Petroleum Pump System Operators, Refinery Operators, and Gaugers	2,050	\$83,850	6.01
47-5081	Helpers--Extraction Workers	420	\$50,350	5.6
11-9071	Gambling Managers	270	\$66,670	5.15
49-9043	Maintenance Workers, Machinery	3,500	\$57,840	5.14
49-9081	Wind Turbine Service Technicians	540	\$53,870	5.03
49-3011	Aircraft Mechanics and Service Technicians	6,090	\$75,590	4.18
19-4043	Geological Technicians, Except Hydrologic Technicians	400	\$73,300	4.05
47-5011	Derrick Operators, Oil and Gas	470	\$54,200	3.94

Key Occupations

Table 10: Employment Location Quotients (LQ)

SOC Code	Occupational Title	2022 Employment	2022 Annual Average Wage	Employment LQ
53-7073	Wellhead Pumpers	580	\$59,810	3.68
49-9091	Coin, Vending, and Amusement Machine Servicers and Repairers	1,400	\$31,190	3.62
45-2011	Agricultural Inspectors	540	\$42,820	3.56
29-9021	Health Information Technologists and Medical Registrars	1,340	\$49,340	3.49
39-1013	First-Line Supervisors of Gambling Services Workers	830	\$44,000	3.49
47-5051	Rock Splitters, Quarry	140	\$30,640	3.3
43-4141	New Accounts Clerks	1,610	\$37,320	3.28
51-8092	Gas Plant Operators	480	\$70,670	3.09

Source: Bureau of Labor Statistics, Occupational Employment and Wage Statistics (OEWS).

Industry Employment Projections

Table 11: 2020-2030 Fort Smith MSA (Pt.) Industry Employment Projections

NAICS Code	Industry Title	2020 Employment	2030 Employment	Numeric Change	Percent Change
000000	Total All Industries	21,274	23,465	2,191	10.3%
110000	Agriculture, Forestry, Fishing and Hunting	223	249	26	11.8%
210000	Mining	376	677	301	79.9%
220000	Utilities	136	145	9	6.8%
230000	Construction	859	972	113	13.2%
310000	Manufacturing	1,384	1,401	17	1.2%
420000	Wholesale Trade	371	416	45	12.1%
440000	Retail Trade	2,832	2,775	-57	-2.0%
480000	Transportation and Warehousing	490	545	55	11.3%
510000	Information	130	144	14	11.1%
520000	Finance and Insurance	646	669	23	3.6%
530000	Real Estate and Rental and Leasing	78	87	9	11.2%
540000	Professional, Scientific, and Technical Services	595	646	51	8.6%
550000	Management of Companies and Enterprises	44	49	6	12.6%
560000	Administrative and Support and Waste Management and Remediation Services	641	777	136	21.2%
610000	Educational Services	2,427	2,542	115	4.7%
620000	Health Care and Social Assistance	2,996	3,474	478	15.9%
710000	Arts, Entertainment, and Recreation	1,022	1,371	349	34.1%
720000	Accommodation and Food Services	1,605	1,692	87	5.4%
810000	Other Services (except Government)	305	346	41	13.5%
910000	Total Federal Government Employment	297	270	-27	-9.2%
999200	State Government, Excluding Education and Hospitals	567	584	18	3.1%
999300	Local Government, Excluding Education and Hospitals	3,251	3,634	383	11.8%

Source: Employment Projections (EP) program, Oklahoma Employment Security Commission, Economic Research & Analysis Division, [Industry and Occupational Employment Projections \(oklahoma.gov\)](https://www.oklahoma.gov/industry-employment-projections).