

THE POINT

March 2021



okcchamber.com

New study shows annual impact of aerospace industry totals \$11.6 billion

A new report released by the Greater Oklahoma City Chamber and RegionTrack shows that the impact of the region's aerospace industry has grown significantly in the last five years, supporting the production of \$11.6 billion in total output of goods and services in 2020.

The study estimated there are 291 public and private sector establishments directly engaged in the industry. With 43,250 workers in these establishments earning an annual labor income of \$3.4 billion. The industry added 55 new aerospace establishments and more than 6,640 employees since 2016.

The private sector is outpacing strong gains in the public sector, creating a stronger balance between public and private sector activity. Private sector employment now makes up 38.7% of the overall number and private labor income increased to 29.8%.

Tinker Air Force Base, with its more than 26,000 employees remains the centerpiece of the aerospace sector in the OKC region. Base personnel represent a dynamic mix of active-duty and reserve military personnel,

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2021 off to a fast start with pair of job announcements

Early in 2021, a pair of companies announced major projects in Oklahoma City pointing to a strong year for the local economy.

“Even though 2020 was rough for a lot of people, we are proud of how the community came together to provide resources to small businesses. We feel initiatives like the Small Business Continuity Program helped the local economy be pretty resilient during the last year,” said Jeff Seymour, executive vice president of economic development for the Greater Oklahoma City Chamber. “We’ve felt Oklahoma City is as set up for success in

2021 as any other metro in the country and these two announcements are a great sign of that.”

Corken recently announced they will be adding 120 new jobs over the next five years to their operations in Oklahoma City.

Corken was founded in Oklahoma City nearly a century ago and its compressors, pumps and other products are used throughout the world.

Recently, Corken's parent company, IDEX, decided to consolidate Corken with another company they own,

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We believe in bucket lists.



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OU Health Stephenson Cancer Center*

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Leadership Notes

Chamber is still a great networking resource

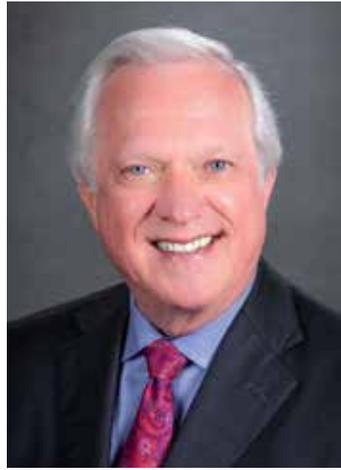
The last year has shown all of us how important our connections are to our happiness and our business success. So frequently, it is the quick conversation with a potential client at an event or community activity that leads to a deeper interaction and a long-term business arrangement or that big sale.

We have all been missing those opportunities during the pandemic and are anxious to get things started again. Your Chamber is still a great place to network; as we infuse a chance to make new connections into our virtual events as much as possible.

As vaccines become more readily available and distributed, we anticipate there will be a time later this year to return to live events, but we won't do so until we know we can provide a safe environment for our members and attendees.

Until then, let's make the most of our virtual environment and the tools we have. Be sure to follow us on social media, and engage around important issues on our Facebook page. Use the membership directory on our website to find your next vendor, go to a virtual grand opening or attend the next Chamber Forum or Enlighten to network before the program. These are definitely habits you can keep post pandemic, but they are a good way to create connections right now.

The work we are all doing today is going to prepare us for a dynamic recovery and a surge of growth. Like you, I look forward to celebrating those results together. Let's stay the course and keep it safe together.



Roy H. Williams, CCE
President & CEO

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"What conventions and groups are coming to OKC soon?"
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THE POINT!

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UPCOMING EVENTS

CALENDAR

(Events are subject to change. Consult okcchamber.com/events for the most recent updates.)

March 23

Member Orientation

8:30 to 10 a.m.

okcchamber.com/orientation

March 23

Creating a Culture of Inclusion

3:30 to 5 p.m.

okcchamber.com/diversity

March 24

Chamber Forum

11:45 a.m. to 1 p.m.

okcchamber.com/marchforum

April 9

Enlighten

11:45 a.m. to 1 p.m.

okcchamber.com/enlighten

April 21

Chamber Forum

11:45 a.m. to 1 p.m.

okcchamber.com/aprilforum

April 27

Creating a Culture of Inclusion

3:30 to 5 p.m.

okcchamber.com/diversity

May 7

Enlighten

11:45 a.m. to 1 p.m.

okcchamber.com/enlighten2

May 12

State of Health

11:30 a.m. to 1 p.m.

okcchamber.com/stateofhealth

Chamber announces State of Health date, panelists

As one of the nation's major centers of health care delivery, the Oklahoma City region employs more than 82,000 health care sector workers. Learn more about the business of health care at the Greater Oklahoma City Chamber's State of Health event on Wednesday, May 12, from 11:30 a.m. to 1 p.m. The virtual event will feature a panel of the region's health care leaders discussing the impact of the past year on their institutions and the outlook for the health care industry's growth in 2021 and beyond.

The event will also include a bioscience panel discussion from the perspective of entrepreneurs and researchers working in the Oklahoma City market. Panelists will discuss what the bioscience industry includes in Oklahoma, its current areas of expertise and where the industry is headed in the future. Confirmed panelists include Christian Kanady, CEO of Echo Investment Capital, LLC; Dr. Jesse McCool, founder and CEO of Wheeler Labs and Dr. Rodger McEver, vice president of research for Oklahoma Medical Research Foundation, with more to be announced.

Tickets for this online event are \$25 for members and \$40 for nonmembers. Register online at okcchamber.com/stateofhealth. Special thanks to Host Sponsor OU Health.

March Creating a Culture of Inclusion event to focus on diversity in business suppliers

The Greater Oklahoma City Chamber and the Urban League of Oklahoma City Inc. are continuing their partnership to provide practical resources for companies looking to boost their diversity, equity and inclusion with a March event focusing on connecting with diverse business suppliers. Attendees will hear from Johné Battle, vice president of diversity and inclusion at Dollar General, on March 23 from 3:30 to 5 p.m.

Battle will unpack why corporations like Dollar General and Walmart are investing time and resources to build inclusive sourcing strategies and make the business case for global supplier diversity and inclusion. In addition, he will highlight many of the practices corporations are implementing to achieve successful outcomes, what metrics are available to assess impact and what sustainable benefits companies are deriving from diversity, equity and inclusion programs. Individual tickets are \$25 for Chamber and Urban League members or \$40 for nonmembers to each session. To register or for more information, visit okcchamber.com/diversity.

Special thanks to Presenting Sponsors AT&T Oklahoma, American Fidelity Assurance Company, Bank of America, The Boeing Company, The Chickasaw Nation and Devon Energy Corporation.

Attend March Chamber Forum to learn about the outlook for entrepreneurship in Oklahoma City

The state of Oklahoma City's entrepreneurial ecosystem is the focus for the March Chamber Forum, which was rescheduled from its original February date due to winter weather. The online event will now be held on Wednesday, March 24, from 11:45 a.m. to 1 p.m. The event will feature a panel discussion on how Oklahoma City is encouraging entrepreneurship, the growth of the community in the past few years, and what Oklahoma City needs to add within its existing communities in order to be more successful.

Panelists include Evan Fay, manager of innovation and entrepreneurship for the Greater Oklahoma City Chamber; Nathaniel Harding, managing partner of Cortado Ventures; Jennifer McGrail, director of Launch Pad FT at Francis Tuttle Technology Center; and Tom Wavering, executive director of Tom Love Innovation Hub at the University of Oklahoma.

CHAMBER FORUM

Attendees will also have the opportunity to participate in small group networking, so come prepared to meet new faces or reconnect with familiar ones. Tickets are \$15 for Chamber members and \$25 for nonmembers. Chamber Forum half-season ticket packages are also still available! Purchase a half-season package of five Chamber Forums of your choice for \$75. Register online at okcchamber.com/marchforum.

Special thanks to Presenting Sponsor Cox Business and Corporate Sponsor ADG.

March Enlighten offers tips for managing stress and morale

After a year of personal and professional stress, many people are facing the remainder of the year running on nothing but fumes. On Friday, March 5, from 11:45 a.m. to 1 p.m., the March Enlighten will offer tips to help you manage the stress and staff morale after an unrelenting year. Heartland's Lance Haffner, president of payroll & HCM solutions, and Kari Holden, vice president of payroll sales, will speak about how setting the tone for your staff, being mindful, managing conflict correctly and more will help you lead by example and encourage your employees to do the same.

For the first time, the March Enlighten will also include online small group networking using the Zoom breakout room feature. Attendees will be randomly placed into small groups before the program starts at noon, so come prepared to meet new faces or reconnect with familiar ones.

Enlighten virtual events are free and available to both Chamber members and nonmembers. Register to receive the Zoom link at okcchamber.com/enlighten. Special thanks to Presenting Sponsor Cox Business.

A promotional poster for the 'Enlighten' virtual event. The background is light blue with faint white icons of a lightbulb, a paperclip, and a speech bubble. At the top, the word 'Enlighten' is written in a large, blue, rounded font, with a white lightbulb outline behind the 'E'. Below it, in smaller white text, is 'A GREATER OKLAHOMA CITY CHAMBER VIRTUAL EVENT'. In the center, the date and time 'Friday, Mar. 5 11:45 a.m. to 1 p.m. CST' are displayed in white, followed by 'Online Event via Zoom'. At the bottom, the 'GREATER OKLAHOMA CITY CHAMBER' logo is shown in white, stacked vertically.

Enlighten
A GREATER OKLAHOMA CITY CHAMBER VIRTUAL EVENT

Friday, Mar. 5
11:45 a.m. to 1 p.m. CST
Online Event via Zoom

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Sector Spotlight: Manufacturing in Oklahoma City

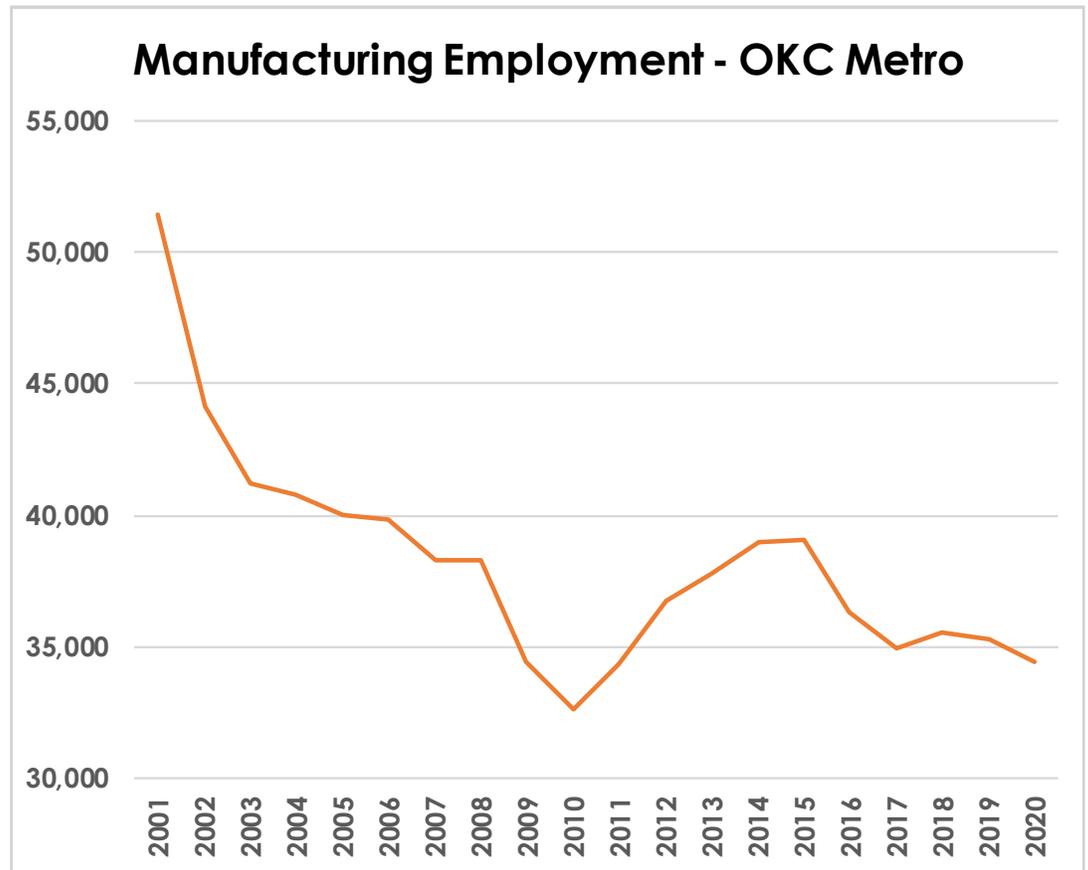
Manufacturing remains an important economic sector in Oklahoma City, employing more than 34,000 people and accounting for 5% of the jobs in the metro.

“Manufacturing jobs are important in our region because their wages are 17% higher than the average wage across other industries,” explained Jeff Seymour, executive vice president of economic development at the Chamber.

“We are seeing a real wave of manufacturing projects considering our market right now,” he continued. “Our business climate is attractive to these companies looking for an expansion site or new location.”

“Nationally, strong growth is predicted for this sector. The top trends in the industry center around resiliency: securing supply chains, finding ways to minimize disruptions, and investing in new technologies. We see that same focus with our local manufacturers and the projects considering Oklahoma City,” he continued.

Following a precipitous decline of manufacturing jobs between 2000 and 2010, with the loss of major employers such as Lucent, General Motors and Bridgestone Firestone, the market has seen a mix of closings and job growth, with overall job growth of 5.4% in the last decade. This growth is slightly lower than the



state (8.7% growth) or the nation (7.7%).

In total, there are currently 1,285 payrolled manufacturing business establishments in Oklahoma City.

A number of manufacturing announcements were made in the last 12 months, including an expansion at Malarkey Roofing Products, Bakery Bling, Mom’s Meals and Corken Products.

The manufacturing workforce is older than in other industries. Over the nearly 10,000 employed in the sector, nearly 28% are 55 or older, compared with only 23% in that same age bracket across other industries.

“For this industry to continue its growth, workforce development is going to be a critical factor,” said Seymour. “We have seen a decline

in interest in jobs in this sector and it is going to be important to expose more students to the high earning potential in manufacturing.”

The five most common occupation titles employed in the OKC Manufacturing sector include assemblers & fabricators (2,427); welders, cutters, solderers, and brazers (1,838); first-line supervisors of production and operating workers (1,544); laborers and freight, stock, and material movers, (908); and electrical, electronic, and electromechanical assemblers (889).

In addition to the payrolls manufacturing brings to the market, the industry accounts for \$4.5 billion, or 6% of total GDP for the metro. In comparison, the industry accounts for a larger 12% of GDP for both the state and the nation.

Announcements jump (cont'd from page 1)

Liquid Controls. This new headquarters operation will be located in Oklahoma City under the name Advanced Flow Solutions.

“We could not be more excited that Corken and its parent company IDEX decided to expand in Oklahoma City,” said Seymour. “Corken looked at some other major metros but ultimately decided Oklahoma City made the best business sense for its operations. Besides bringing more well-paying jobs to our market, Corken is also very active in the community. We look forward to their continued growth in Oklahoma City.”

Approximately 100 of the new jobs will be in manufacturing with the other 20 being in engineering, finance, executive leadership and other roles. Corken currently has 250 employees in Oklahoma City. The company will soon be moving into its new 150,000-square-foot headquarters located near I-35 at the Britton Road Commerce Park.

Also in January, Mom’s Meals, which produces refrigerated home-delivered meals for the healthcare

industry, announced it would be building a 200,000-square-foot prep kitchen in Oklahoma City. Mom’s Meals uses professional chefs and registered dietitians to create their seasonal menus.

The new facility will be built west of Will Rogers World Airport and initially employ 125. The workforce will eventually expand to 550.

The Oklahoma City facility will be the first time Mom’s Meals, based in Iowa, has built its own facility and construction is expected to begin later this year. The other two facilities the company operates are located in Iowa and Ohio.

“Mom’s Meals is a very exciting win for our community,” said Seymour. “The company is going to bring a lot of new jobs to our city, undertake a big construction project and provides a great service to the community.”

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Will Rogers World Airport prepares to open expansion

As officials at Will Rogers World Airport work through an unprecedented decline in air travel at the same time they are implementing a significant terminal expansion, editors of The POINT! reached out to Mark Kranenburg, Oklahoma City's Director of Airports, to get some insight on what is next for the region's largest airport.

Q. This expansion was contemplated as part of the airport's long-range plan developed more than 20 years ago. What are the goals of the work you are doing now?

A. Our planning progress started in 1999 and this is the third phase of that work. This project really builds on the second phase we completed in 2006 that was mainly a functional and aesthetic improvement, but only netted one new gate.

The goals of this expansion and renovation project are constructing four new gates that will be the beginning of an east concourse consisting of ultimately nine gates (the other gates to be built on demand); construction of a larger, more functional security checkpoint; and new concessions. We've dramatically improved public circulation with a large open space lobby prior to entering security, and a double-volume space we call the atrium when you come out of security, large meeter/greeter lobbies, and a 4,200 square foot mezzanine level where non-ticketed visitors will have 180-degree views of the airfield while they see off family and friends or wait for arriving passengers. The new concourse is 30-feet wider than the west concourse and includes a nursery, a second pet relief area and new expanded restrooms. In total, we are adding 136,000 square feet of new space and renovating another 21,000 square feet.

Q. How is the work progressing and when will people start to see the changes?

A. The expansion is on track to be complete later this summer. The areas of renovation will continue after we open the new space. We also have an apron paving project going on at the same time, so we are at a point in the project where we are threading the needle so that as construction is complete in the new space, the paving project has to be complete before we can set the new passenger loading bridges, and then also outfitting the new spaces with furniture and other equipment. I give credit to the design team, Frankfurt-Short-Bruza



Associates; the contractor, Timberlake Construction; and the paving contractor, Duit Construction, who are working to pull all this together. And of course, our airport team who is involved every step of the way.

Q. What can we expect with the rollout to be on the new concessions?

A. First, I want to say how incredibly fortunate we are to have the partner we have in Paradies Lagardere. The airline and airport industry and really the entire travel and hospitality industry have been devastated by the pandemic. When air travel stopped suddenly in March 2020, most terminal concessionaires put on the brakes and were wary of entering into new contracts with so much in doubt as to when air travel would recover. Airport staff and Paradies were committed to a process that would help build back the concession program over the next couple of years. Paradies is very familiar with the progress Oklahoma City has made over the last 20 years or so and they have confidence in OKC. It was that confidence in OKC and the long-standing relationship we have had with Paradies that led them to sign a contract with us and agree to be a partner as we build back this business. And Paradies did a great job partnering with local restaurants and retail stores to have a presence in the airport.

We had a record numbers of passengers in 2018, and then bested that by 10% in 2019. Our daily traffic through the terminal was running between 5000 and 7000 passengers a day, depending on the day and the season, before the pandemic. Those numbers dropped

to a low of 239 passengers one day in April. We have steadily climbed back to around 50% of our 2019 numbers and have stayed there the past six months or so. So, we have staggered the start of new concessions as passenger numbers grow. We just cannot support 20 food and beverage and retail offerings with these low numbers. So over time we will build back the business.

Currently, in the terminal we started with a new concept called Tuk Tuk Go which is a grab-n-go operation and we have two full-service bar/grills open in the concourse, The Grill at OKC and OKC Flight Cantina. The next two outlets to open this summer are Trip Advisor, a travel essential store, and Vino Volo Craft, a sit-down restaurant/bar showcasing both wines and craft beers. This fall we will add Starbucks, which is an amenity we had high demand for from our local customers. People are used to seeing Starbucks in other airports, but our Starbucks is going to be much larger than a typical airport location. After that, Freddy's Steakburgers will be the first restaurant to reopen in the food court.

As passenger numbers return, we will gradually roll out the remainder of the food and beverage program, which includes Elemental Coffee Café, the popular community-driven, small-batch roastery and café that will be located pre-security; Hatch, Oklahoma City's next-level breakfast destination; Osteria, a restaurant and craft bar dedicated to classic Italian cuisine; and Tropical Smoothie Café, which will serve incredible smoothies and wholesome food options in the food court.

Retail stores that will be added include Plenty Mercantile, the local gift store that champions sustainability and hospitality; Tin Lizzie's, offering a crafted selection of Oklahoma-owned boutiques, artisans and makers; Oklahoma's Own News 9 Travel Essentials, showcasing the iconic KWTW News 9; Corsa featuring Brighton and SPANX, offering top fashion and accessories for any traveler; and iStore Express, the quick stop for the best tech accessories on the market.

Q. Aside from the expanded space and the new concessions, what else can people look forward to with the expansion?

A. I think the art projects in the new space are really going to wow everyone. Matt Goad, a local artist, was selected for this project. The work is seen in the terrazzo floor and on a large glass wall in the atrium area as you pass through security.

The terrazzo design connects past to present, present into the future, and earth to sky. The artistic goal for the lobby entry creates a timeless narrative that guides the traveler through the space in a way that tells the story of Oklahoma City and is at the same time calming for passengers.

Once you leave security and enter the large atrium that again welcomes visitors, the art provides a sense of place and celebrates our city. And the terrazzo art further extends into the new gate areas. You will not be able to walk more than a few feet without being able to enjoy terrazzo art in some way. The curtain wall of opaque glass in the atrium is filled with international weather symbols. It is interesting and educational and beautiful all at the same time. The artist really did a remarkable job with the project and I cannot wait for people to see how it changes the space.

Q. So how is the business of the airport going in the pandemic and how do you see things coming back?

A. There is such a parallel between the health and growth of the economy and aviation. The two are inextricably linked. Travel today is mainly leisure travel with family and friends with some business travel. I think we will get back to greater business travel over the next year or so.

For me, what is tragic is that over the past five years we had recruited a significant amount of new non-stop destinations. We had air service to several locations on the east and west coast and other major markets such as Washington, D.C. We hit every target on our list and were searching for new markets when the pandemic hit. Most airlines kept limited service in OKC, but numerous other markets were suspended and still are. But we are seeing signs of life. American Airlines is planning to restore Ronald Reagan Washington National Airport and Los Angeles Airport in April, but other airlines are still being very surgical, adding a flight here and taking away service there.

Today, OKC is averaging 50 to 55% passenger numbers compared to the same month the year before. Airline hub airports are still busy but airlines have eliminated a lot of point-to-point service from smaller markets. It will be a slow return, a year or two for sure. The vaccine is a huge lift, and we anticipate seeing more people traveling as vaccines roll out. People want to travel. Airlines and airports are doing a great job in making it as safe as possible for the traveler.



The long-awaited I-235/I-44 interchange expansion is showing signs of progress.

Metro-area highway system upgrades

Motorists can continue to expect construction within several Oklahoma City metro interstate work zones this spring, but with the promise of improved pavement conditions and safety updates along some of the most heavily traveled corridors within the city.

The **I-235/I-44 interchange** project has hit two major milestones with the recent opening of the two flyover ramps, making this the first four-level interchange on Oklahoma's highway system. This significant interchange project is on schedule to be completed in fall 2021.

The **I-40 Del City bridge** project also remains on schedule, but motorists can expect continued lane and ramp closures through 2023.

The newest project that will impact up to 150,000 motorists daily starts March 1 and is expected to be complete in late summer 2021 at **I-35 just south of the I-35/I-235/I-40 Dallas Junction** between Southeast 15th Street and just south of I-40 and the Oklahoma River. This work is a heavy maintenance project to extend the lifespan of these I-35 bridges.

The following is an update of all the major projects taking place in and around Oklahoma County:

I-235 and I-44

I-235/US-77/Broadway Ext. and I-44 interchange - Off Broadway

This project of up to \$105 million will reconstruct and widen I-235 to at least six lanes between North 50th Street and Northwest 63rd Street and construct a four-level interchange with flyover ramps. The project began in late March 2019 and continues through fall 2021.

I-235 remains open to two lanes in each direction, but lanes are narrowed and shifted, and the speed limit is reduced. There will be night and weekend closures later in the project, including full weekend closures for overhead bridge work, and closures of the North 50th Street and North 63rd Street ramps. I-44 lanes are narrowed and shifted between Kelley Avenue and Western Avenue through summer 2021.

The final phase (nearly \$17 million) in FY 2023 will reconstruct the northeast quadrant of the interchange, including a direct connection from North Lincoln Boulevard to northbound US-77/Broadway Extension.

I-40

I-40 bridge reconstruction and widening at Crutch Creek, SE 15th St. and Sooner Rd. in Del City

The six bridges will be reconstructed and widened for future additional lanes along I-40 at an estimated nearly \$80 million in a combined project.

This project was awarded in June 2020 and construction started September 2020. The project is estimated to take 2.5 years to complete. These bridges are structurally deficient and monopolize the Oklahoma City metro's maintenance resources due to poor conditions and frequent repairs.

Work started in late March 2020 to resurface I-40 for \$1.4 million between the I-35/Fort Smith Junction and Sooner Road to prep the driving surface for the upcoming project. Work will be completed by early May 2021.

I-40 east corridor study from I-35 to Douglas Boulevard

This ongoing engineering study is looking at traffic patterns, future traffic growth and other future needs of the I-40 corridor such as additional lanes, modification to access such as ramps and frontage roads and new bridges.

The \$1.6 million study contract was awarded in 2015 and is in progress. The corridor study is broken into two areas: I-40 between Reno Avenue and Hudiburg Drive, and I-40 between Hudiburg Drive and Industrial Boulevard.

I-40 interchange construction at Frisco Road in Yukon

A new I-40 interchange will be built at Frisco Road in Yukon to relieve traffic congestion at nearby interchanges including Garth Brooks Boulevard.

This \$14 million project was awarded in July 2020 and work began in September 2020. Completion is expected to take nearly a year. The project is in partnership with the City of Yukon and the Federal Highway Administration.

I-35

I-35 bridge rehabilitation over Stillwater Central Railroad between just south of I-40 and the Oklahoma River and SE 15th Street

The I-35 bridge between Southeast 15th Street and I-40 and the Oklahoma River will be rehabilitated and will include deck and limited structure repairs.

The contract of just less than \$2 million was awarded and work was expected to begin March 1, 2021, and continue through summer 2021. This work will be very disruptive to traffic as the bridges will be worked on one-half at a time. This means traffic will be narrowed to two lanes in each direction and the project will include intermittent ramp closures.

I-35 corridor study in Moore and Norman

ODOT, City of Moore and City of Norman partnered on a \$775,000 study beginning in 2017 to look at I-35 interchanges, on- and off-ramps and service roads between just north of North 5th Street in Moore and Main Street in Norman.

Upcoming construction projects identified as part of the corridor study include: intersection modification on Robinson Street just west of I-35 in Norman (contract awarded); modifications to the I-35 service roads and ramps at Indian Hills Road in Norman; and



Improvements are underway on I-40 east at Crutch Creek, Southeast 15th Street and Sooner Road.

modifications to the I-35 service roads and ramps at South 19th Street in Moore.

I-35 – Upcoming

I-35 pavement rehabilitation between I-44 and Kilpatrick Turnpike

An estimated \$8 million for pavement rehabilitation in FFY 2021.

I-35 and I-240 Crossroads interchange

Four remaining construction phases scheduled for FFY 2021, 2023, 2025 and 2027 will complete reconstruction of the I-35 and I-240 junction to a multi-level interchange with flyover ramps, similar to what is being built at I-235 and I-44.

The estimated costs for the phases are \$28 million, \$21 million, \$20 million, and \$30 million.

I-44

I-44 pavement and bridge rehabilitation between I-40 and SW 74th St.

This \$28 million project will rehabilitate the I-44 bridges and pavement between I-40 and Southwest 74th Street continues through 2021.

The project includes the rehabilitation of the bridges over the Oklahoma River, bridges over Southwest 29th Street, the eastbound bridge over Independence Avenue, bridges over Southwest 59th Street and the eastbound bridge over I-240.

Aerospace study shows industry growth (cont'd from page 1)

permanent federal civilian employees and civilian contract workers. These workers represent the largest single concentration of aerospace-related employment in the region, as well as a large share of total aerospace employment statewide.

The FAA Center is the second-largest aerospace employer in the region with more than 5,150 workers. The center is home to the highest concentration of FAA civil servants and contractors in one location outside of Washington, D.C. The large economic role of the facility is traced to its total operating budget of \$1.1 billion in fiscal year 2019. The FAA Center is a unique aerospace asset that plays a key role in national aviation policy, airport maintenance, air travel safety and aviation education. The center is also a major provider of shared services to organizations operating under the Department of Transportation as well as other federal organizations. Additionally, on a typical day, the FAA Academy at the center hosts up to 1,000 students.

Boeing is the second-largest aerospace and defense contractor in the U.S. and has greatly expanded its presence in Oklahoma City in recent years. Boeing is the largest private aerospace employer in the region with approximately 3,660 employees and is the largest federal contractor in the state.

Other major aerospace employers in the region include the Oklahoma Air National Guard (1,235 employees), Northrop Grumman (807 employees), CACI (400 employees), Southwest Airlines Reservations (360 employees), AAR Airframe Maintenance (322 employees), and Field Aerospace (280 employees).

Aerospace Occupations and Wages

Oklahoma continues to rank highly in the number of employees across key aerospace occupations. Ongoing growth in the sector is adding large numbers of highly skilled workers to the region, particularly engineers. Approximately 1,900 workers in engineering occupations were added (across all industries) to the Greater Oklahoma City region workforce between 2015 and 2020.

Wages for most aerospace occupations in Oklahoma remain highly competitive relative to other aerospace markets and reflect the low overall cost-of-living in the state. Wages in most aerospace occupations generally



exceed the overall state average, with median hourly wages generally above \$20 per hour. The median hourly wage typically exceeds \$40 per hour for engineers, air traffic controllers, pilots and software developers. Median wages are below \$20 per hour in only a few key aerospace occupations, primarily air passenger airline services and some entry-level aircraft maintenance positions.

Oklahoma Aerospace Market Rankings

The 2020 report includes a benchmark comparison of state-level aerospace markets that captures both the private and public sides of the industry. The states have a widely varying mix of public and private sector aerospace activity. Public sector entities and jobs are often excluded from state-level comparisons of aerospace markets, an approach that fails to capture the strength of the Greater OKC market. The true extent of the aerospace market in states like Oklahoma with a high share of public sector activity is not well captured in existing industry comparisons.

For example, Oklahoma ranks highly based on private sector activity alone, but generally only receives an upper mid-tier ranking. Based on private sector size, Oklahoma's aerospace sector ranks among the top 20 states – 15th in the number of business establishments, 20th in employment and 20th in total wages paid in 2019. These rankings all exceed the state's rank as the 28th most populous state.

However, Oklahoma rises to the 10th largest aerospace market when both public and private sector

aerospace employment are considered. The jump in rankings is driven by the state's position as the fifth largest concentration of public sector aerospace-related employment among the states. Oklahoma ranks first among the states in the number of civilian Air Force employees, with nearly all based at Tinker Air Force Base. It is this deep concentration of public sector aerospace jobs in Oklahoma that makes their inclusion so vital in comparative state-level studies of aerospace.

State and Local Policy

State and local policymakers remain committed to fostering growth in the industry and continue to pursue economic development efforts to grow aerospace in the Greater Oklahoma City Region. The Oklahoma Engineer Workforce Tax Credit remains an important incentive in attracting high-wage aerospace jobs to the region. The Oklahoma Legislature also recently approved a tax credit designed to boost the numbers of highly skilled workers in software development and cybersecurity. Large numbers of graduates from the state's public and private universities and completers of CareerTech aerospace programs continue to fill jobs in state aerospace firms.

Federal Procurement Trends

Federal contracting serves as a significant source of economic activity in Oklahoma and the Greater Oklahoma City region and is closely tied to aerospace activity, particularly at Tinker AFB. Total federal contracting by place of performance in the 10-county Greater Oklahoma City region is up 37% since the 2015 aerospace report, from \$1.96 billion to \$2.69 billion. Approximately 65% of total state contracting activity is traced to the 10-county Greater Oklahoma City region.

Total contracts issued by the Air Force and performed in the Greater OKC region totaled \$1.88 billion in fiscal year 2019 and comprised 45% of total contracting in the state from all federal sources. Across the Air Force, FAA, and NASA, or the three federal entities most closely tied to aerospace, vendors located in the 10-county region performed \$2 billion in contracts in fiscal year 2019. Some of these contracts only indirectly support aerospace activities. An alternative measure of federal contracts identifying goods and services that are directly aerospace-related, regardless of government agency, totaled \$1.62 billion in fiscal year 2019.

Economic Spillover Effects and Tax Impact

In terms of direct employment, approximately 43,250 workers in the region are employed directly in aerospace, with three-fourths (32,554) employed in public sector positions at Tinker AFB, FAA Center, and the Oklahoma Air National Guard. In total, an estimated 77,105 jobs statewide are provided either directly by the aerospace sector or supported indirectly through multiplier effects generated by the industry.

The \$3.4 billion in direct labor income paid to workers in the aerospace sector likewise generates substantial ripple effects as the income is earned and recirculated within the regional economy. An additional \$2.4 billion in labor income is earned by workers in other industries statewide, or a total earnings impact of \$5.8 billion in the region.

Aerospace establishments in the region generated an estimated \$7.23 billion in direct output of goods and services in 2020. Overall, either directly or indirectly through multiplier effects, aerospace activity in the Greater Oklahoma City region supported the production of \$11.6 billion in total output of goods and services in 2020.

The total direct and spillover effects traced to the aerospace industry are far larger in 2020 than in the 2015 report. Total employment traced to aerospace in the region increased from 67,583 to 77,105, a 14% increase over the past five years. The total labor income effect increased by more than \$1.7 billion, from \$4.1 billion to \$5.8 billion, or a 43% increase. Total output produced by the aerospace industry increased by an estimated 42% since 2015, from \$8.2 billion to \$11.6 billion.

Estimates suggest that activity generated directly by the industry produced approximately \$300 million in tax payments to state and local government in 2020.

Aerospace Growth Trend Intact

The report finds that the aerospace industry in the Greater Oklahoma City region remains vibrant and has experienced considerable growth and development since the last evaluation of the sector in 2015 and suggests continued aerospace industry growth in the region going forward. To review the study in full or for more information, go to greateroklahomacity.com/aerostudy.

WELCOME NEW MEMBERS

Businesses who join the Greater Oklahoma City Chamber are part of the largest coalition of businesses in the state and make the Chamber's work in the community possible. Each member level is identified on the listing below.

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www.hiebricktown.com

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USO Oklahoma

Nonprofit / Service Agencies

Ms. Jennifer Kirby (580) 583-3509
3265 Crane Ave.
P.O. Box 33621
Fort Sill, OK 73503-0621
oklahoma.uso.org

GRAND OPENINGS

Congratulations to Chamber members on their recent Grand Openings! To see the schedule of upcoming Grand Openings or subscribe to the Grand Openings calendar, visit okcchamber.com/grandopenings.

Chickasaw Community Bank

909 S. Meridian Ave.
Oklahoma City, OK 73108

Trinity School at Edgemere

3200 N. Walker Ave.
Oklahoma City, OK 73118

Herbology

115 E. Reno Ave.
Oklahoma City, OK 73104

Comfort Keepers

2601 NW Expressway, Suite 107W
Oklahoma City, OK 73112

Strata Leadership

11600 Broadway Extension,
Second Floor
Oklahoma City, OK 73114

Purpose Healthcare

321 S. Blvd., Suite 117
Edmond, OK 73034

CASA of Oklahoma County

1608 NW Expressway
Oklahoma City, OK 73118

TTCU Federal Credit Union

15104 N. Pennsylvania Ave.
Edmond, OK 73013

Orthodontic Associates

5805 N. Classen Blvd., Suite B
Oklahoma City, OK 73118

ECONOMIC INDICATORS

OKC No. 1 Lowest Cost of Living Among Large Cities

Where You Live Matters! C2ER Q4 2020 Average Price Report

City	Composite Index	Coffee	Apartment Rent	Gasoline	Doctor Visit	Men's Haircut	Movie Ticket
Oklahoma City OK	86.6	\$3.81	\$846	\$1.64	\$107.83	\$16.60	\$9.40
Memphis TN	87.3	\$3.96	\$984	\$1.75	\$90.32	\$16.20	\$11.50
Indianapolis IN	90.9	\$3.91	\$1,056	\$1.86	\$90.38	\$17.80	\$11.27
Columbus OH	91.6	\$7.73	\$1,132	\$2.18	\$137.34	\$13.85	\$11.00
Jacksonville FL	92.3	\$4.09	\$1,290	\$2.07	\$71.25	\$17.40	\$12.60
El Paso TX	92.6	\$6.12	\$928	\$1.94	\$147.50	\$15.66	\$10.21
Fort Worth TX	92.6	\$4.38	\$1,134	\$1.61	\$91.05	\$28.55	\$10.22
National Average	100	\$4.32	\$1,172	\$2.04	\$115.90	\$19.54	\$10.69

Check out the Cost of Living Calculator at abetterlifeokc.com/costofliving

- Oklahoma City ranks No. 1 for Lowest Cost of Living among all reporting large cities over 500,000 population. The C2ER Annual Cost of Living Index for Oklahoma City in the most recent quarter of 2020 was 86.6.
- Example: If you are earning \$70,000 after tax in Boston the comparable income to achieve the same standard of living in Oklahoma City is \$40,346. If you moved from Boston to Oklahoma City:
 - Groceries will cost 19% less
 - Housing will cost 69% less
 - Utilities will cost 20% less
 - Transportation will cost 18% less
 - Health will cost 21% less

For comprehensive Economic Indicators and Regional Data, please visit your Greater Oklahoma City Chamber Economic Development Division at greateroklahomacity.com or contact Eric Long, Research Economist – 405-297-8976; elong@okcchamber.com



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