



The Economic Impact of the Cherokee Nation

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The Economic
Impact Group

Executive Summary and Key Findings

This report is a continuation of a bi-annual effort to examine the economic relationship between the Cherokee Nation and the fourteen counties that comprise the Nation's reservation. Economic impact reports use measures of economic activity to proxy for a broader and more inclusive measure of economic connectedness. The larger the economic impact, the more connected the core activity is to the regional economy. This report will estimate the economic production, number of jobs, and labor income that is either directly tied to Cherokee Nation activities or indirectly linked to Cherokee Nation activities.

Other metrics of connectedness are more difficult to measure but follow naturally from the economic impacts. For example, greater economic opportunities in the counties together with an expansion of Cherokee Nation services naturally lead to greater educational opportunities, more affordable access to health care, critical support for public safety priorities, broad social assistance offerings, and more. That these metrics aren't explicitly measured and reported here should not distract from the reality of their importance. Rather, the natural conclusion from the impressive economic impact of the Cherokee Nation is that northeastern Oklahoma is better off than it would be in the absence of a robust and financially successful Cherokee Nation.

The direct economic footprint and the total economic impact of the Nation continue to grow. Economic activity for the tribe has largely recovered from the immediate post-pandemic period and the Nation is increasing their spending in northeastern Oklahoma with local vendors. The counties also benefit from the Nation as an additional layer of local government that has received and distributed billions of one-time dollars from and through federal transportation programs, health programs, Covid relief and recovery programs, and more. Cherokee Nation allocations of federal funds complement those received by the state, municipalities, and county governments in northeastern Oklahoma. The economic impacts from one such use of federal funds is estimated and reported separately as an addendum to this report.

The economic footprint of the Cherokee Nation is impressive even before estimating downstream multiplier impacts. The Nation provided employment to 14,567 individuals in the 14-county region during the year under review, representing more than \$785 million in labor compensation. Tribal businesses directly produced and sold goods and services generating more than \$1.8 billion in revenues. Cherokee Nation government offices and businesses directly purchased more than \$536 million in goods and services from local vendors in northeastern Oklahoma. The Cherokee Nation is one of the largest producers, employers, providers of income, and purchasers of regional production in northeast Oklahoma even before full impacts are estimated.

The purchases of goods and services from local vendors and the income paid into local households set in motion additional layers of downstream economic impacts. Vendors respond to their relationship with the Cherokee Nation by increasing their own employment and purchases from their supplier network. Households respond to flows of income originating from the Cherokee Nation by purchasing groceries, medical services, restaurant meals, clothes, and more in their local markets. The downstream impacts from vendor responses and household spending add an important layer to the economic impact of the Cherokee Nation. In total, the economic impact of the Cherokee Nation reaches almost \$2.4 billion in output, providing employment opportunities to 14,567 workers and generating more than \$785 million in labor income.

Total Economic Impact			
County	Output	Employment	Income
Tulsa	\$ 1,323,723,765	2,682	\$ 314,644,879
Rogers	\$ 520,357,440	1,367	\$ 74,200,379
Cherokee	\$ 418,151,297	12,015	\$ 357,491,825
Delaware	\$ 242,207,740	1,082	\$ 54,738,893
Sequoyah	\$ 167,479,816	1,344	\$ 78,879,767
Adair	\$ 112,863,870	1,361	\$ 86,833,493
Muskogee	\$ 107,733,231	645	\$ 71,952,330
Mayes	\$ 94,901,095	1,051	\$ 64,167,172
Washington	\$ 54,373,556	431	\$ 22,341,821
Nowata	\$ 33,776,291	310	\$ 9,091,688
Craig	\$ 25,062,908	477	\$ 23,285,846
Wagoner	\$ 23,642,516	173	\$ 35,958,908
Ottawa	\$ 14,097,301	114	\$ 11,438,928
McIntosh	\$ 4,579,081	39	\$ 2,045,345
14-County Total	\$ 3,142,949,907	23,091	\$ 1,207,071,272

Direct Economic Footprint of the Cherokee Nation

The direct economic footprint of the Cherokee Nation is an estimate of the Nation’s economic influence and connectedness to the regional economy before accounting for multiplier impacts. The direct economic footprint summarizes the direct production occurring inside tribal businesses, the direct employment by both the Cherokee Nation and Cherokee Nation Businesses, the direct payment of W-2 wages and benefits, and the direct purchases made by the Nation and from local vendors. The production, employment, compensation, and vendor purchases all speak to the intentional connections fostered between the Nation and the local communities in which they operate. A review of Cherokee Nation financial records, W-2 distributions, and accounts payable records allows the following summary of the Nation’s direct economic footprint.

Direct output is a measure of the Nation’s direct production of goods and services. In this application, we limit the measure of direct output to the production and sale of goods and services by Cherokee Nation Businesses. Note that this approach almost certainly understates the true direct output as it ignores any direct production of goods and services through the Cherokee Nation government. We add to the revenues generated by Cherokee Nation Businesses the direct vendor purchases made by the Cherokee Nation.

Tulsa County experiences the largest direct output as it captures both a significant roll up of revenue and nearly \$130 million in vendor purchases. Rogers, Cherokee, and Delaware counties all enjoy a direct output impact of greater than \$200 million as each county both hosts significant direct economic activity and is home to vendors who benefit from Cherokee Nation purchases. Adair, Muskogee, Mayes, and Washington counties enjoy a significant

Cherokee Nation Direct Output			
County		Direct Output	Share of Total
Tulsa	\$	1,043,136,454	43.8%
Rogers	\$	480,586,792	20.2%
Cherokee	\$	233,725,051	9.8%
Delaware	\$	210,228,098	8.8%
Sequoyah	\$	123,837,014	5.2%
Adair	\$	76,930,655	3.2%
Muskogee	\$	55,372,524	2.3%
Mayes	\$	55,018,478	2.3%
Washington	\$	44,953,960	1.9%
Nowata	\$	29,510,050	1.2%
Craig	\$	13,794,985	0.6%
Ottawa	\$	7,958,142	0.3%
Wagoner	\$	5,116,143	0.2%
McIntosh	\$	1,850,003	0.1%
14-County Total	\$	2,382,018,348	100.0%

direct economic influence while some of the edge counties (Ottawa, Wagoner, McIntosh) experience vendor purchases even without hosting a direct presence. In total, the Cherokee Nation represents direct output of nearly \$2.4 billion in the region.

The Cherokee Nation is among the largest employers in northeastern Oklahoma. Direct employment captures both full and part-time workers who received wage or salary income from the Cherokee Nation during fiscal year 2023. For many workers, the Nation provides a career opportunity with a stable employer and generous benefits. For others, tribal employment provides critical career development opportunities or even short-term transitional employment. In this context, direct employment is a count of all workers for both the Cherokee Nation and Cherokee Nation Businesses that received a w-2 for work provided in 2023. Cherokee Nation

W-2 counts are reported for the work location county while Cherokee Nation Businesses W-2 counts are reported by the county of residence for the worker.

The tribe’s namesake county, Cherokee County, is the largest employer county with 9,282 workers benefiting from at least some employment opportunity during the year. Rogers, Sequoyah, Adair, Delaware, Mayes, and Tulsa counties all enjoy a direct employment presence of more than 400 workers. Washington, Nowata, and Muskogee counties enjoy a smaller direct employment presence while McIntosh, Ottawa, and Wagoner counties have no direct employment presence.

Cherokee Nation Direct W-2 Employment		
County	Direct W-2 Employment	Share of Total
Cherokee	9,282	63.7%
Rogers	903	6.2%
Sequoyah	879	6.0%
Adair	878	6.0%
Delaware	730	5.0%
Mayes	514	3.5%
Tulsa	441	3.0%
Craig	262	1.8%
Washington	240	1.6%
Nowata	227	1.6%
Muskogee	210	1.4%
McIntosh	0	0.0%
Ottawa	0	0.0%
Wagoner	0	0.0%
14-County Total	14,567	100.0%

The Cherokee Nation is both a large and stable employer in northeastern Oklahoma offering jobs across a diverse set of occupations ranging from entry level to advanced professional. In total, the Cherokee Nation reached 14,567 workers in the regional labor market in 2023. Not included explicitly in this report are thousands of additional workers employed around the country working on federal contracts or employees working at CNB properties outside the reservation.

Cherokee Nation employment not only provides diverse job opportunities in the regional labor market but also provides essential household income flows into the communities in northeastern Oklahoma. These household income flows support local spending in cities and towns in the region reliant on sales taxes for general revenue.

Compensation is reported as income plus benefits applying a conservative 35% benefit ratio to reported wages and salaries. It should be noted, however, that employer-provided benefits for full-time employees are considerably more generous.

As the namesake county, Cherokee County enjoys the greatest flows of compensation into local households with the Cherokee Nation directly accounting for more than \$245 million in household income. The region’s most populous county, Tulsa County, receives more than \$162 million in household income. Households in Adair, Sequoyah, Rogers, Muskogee, Delaware, Mayes, and Wagoner counties all enjoy direct income flows from the Cherokee Nation in excess of \$30 million. Even counties with no direct Cherokee Nation employment (McIntosh, Ottawa, and Wagoner) benefit from the compensation paid to residents in those counties that travel into adjacent areas to work. In total, the Cherokee Nation directly provides more than \$785 million in labor compensation for households in the 14-county region.

It is worth emphasizing again that the direct impacts reported above are not subject to any multiplier or impact analysis. They are simply a review and report of direct Cherokee Nation activity in the region. The Nation

directly produces, sales, or buys almost \$2.4 billion in goods and services in the regional economy. The Nation provides direct employment opportunities to 14,567 workers in the regional labor market. The Nation is directly responsible for more than \$785 million in labor compensation flows into communities throughout the 14 counties. Impact reports estimate a measure of connectedness between a central activity and the broader economy. Without any formal modeling, a careful review of Cherokee Nation activities reveals an economic engine tightly connected to local suppliers, to the local labor market, and to local communities.

Following a brief review of the key terms and methodology used in this report, a full estimate of economic impacts is presented for each county in the region.

Cherokee Nation W-2 Compensation			
County		Direct W-2 Compensation	Share of Total
Cherokee	\$	245,415,829	31.3%
Tulsa	\$	162,142,530	20.7%
Adair	\$	71,333,991	9.1%
Sequoyah	\$	59,462,715	7.6%
Rogers	\$	51,419,594	6.5%
Muskogee	\$	49,652,233	6.3%
Delaware	\$	40,916,524	5.2%
Mayes	\$	38,032,119	4.8%
Wagoner	\$	30,180,845	3.8%
Craig	\$	12,043,876	1.5%
Washington	\$	10,895,589	1.4%
Nowata	\$	6,865,882	0.9%
Ottawa	\$	5,975,580	0.8%
McIntosh	\$	762,533	0.1%
14-County Total	\$	785,099,840	100.0%

Methodology and Key Concepts

Economic impact models estimate the *total* economic activity that results from a *new* source of economic influence. The *new* economic influence is often referred to as an *economic stimulus*. Consider as an example an existing regional economy operating at normal levels when a *new* economic influence is injected into the economy in the form of demand for a new home. The development of the new home serves as a regional economic stimulus, and the *total* economic activity that results from home construction likely exceeds the value of the new home. New home construction may require purchases from local lumberyards. The lumberyard, in turn, requires additional labor hours to fill the new order. The lumberyard requires, as well, new purchases from their wholesale provider to maintain inventory levels, which in turn require a trucking or distribution service to make the lumber delivery to the lumberyard. At each layer of activity, new income is generated as workers work extra hours to accommodate the new order, wholesale purchase, and delivery. A portion of the extra income will be spent locally on restaurant meals, entertainment, clothing, health care, and other industries. The spending starts a second wave of economic activity as these providers respond much as the lumberyard did to meet the new demand. By the end of the process, the total new production in the local economy and the total new employment and income generated in the local economy exceed that which was required simply to build the new home. The difference between the *new* economic influence and the *total* economic influence is referred to as the economic multiplier, or economic spillover effect.

Estimating the total economic impact of the Cherokee Nation involves building models of the 14 counties operating at normal levels. Cherokee Nation purchases from local vendors in those counties serve as an economic stimulus in those counties, just as the original purchase from the lumberyard did in the illustration above. A second source of economic impacts stems from the change in local income as Cherokee Nation employees carry their paychecks home to their home counties to be spent in the local economy.

Using the set of new vendor purchases and new household income as county-level stimuli, we estimate the resulting downstream economic impacts. Note that rather than beginning with Cherokee Nation production and letting the models assume a set of vendor purchases, we start one layer downstream with the actual vendor purchases made by the Cherokee Nation. That is, we remove one layer of estimates and assumptions from the impact analysis process. From this set of actual vendor purchases and actual household income streams, we estimate the remaining downstream economic impacts. To these estimates, we add back the original economic activity that was Cherokee Nation production, employment, and income.

Sources of Direct Economic Footprint

Direct Output	CN and/or CNB production of goods and services: For CNB entities, total revenue serves as the measure of production;
Direct Labor Income	Measure of labor compensation, including salary and benefits paid to Cherokee Nation employees; direct labor income is reported by the county in which the employee resides and where the spending impacts will be realized.
Direct Employment	CN and/or CNB employees, both full and part time; direct employment is primarily reported by the county in which the job is located where the data allow
Direct Vendor Purchases	First-line purchases of inputs by CN and CNB operations; reported in this document as a source of direct output.

The Cherokee Nation’s direct economic footprint and total economic impact are reported for three broad measures of local economic activity. They are output (or local production of goods and services), employment (including both full- and part-time employment), and labor income (including the total value of compensation, including wage payments and benefits). The measures of economic activity are summarized and defined below.

Economic Impact Concepts

Output	The value of all goods and services produced in the local economy.
Employment	The number of jobs supported in the local economy; includes both full- and part-time employment and may represent either a new job or expansion of hours from an existing job.
Income	The value of compensation, including wages, salaries, and benefits

Downstream economic impacts are estimated in a 14 by 14 multi-regional input-output model.¹ In a multi-regional approach, new economic activity in one county exerts an impact within that county but also has spillover impacts captured in each of the 13 other counties. Each of the counties that experiences a spillover impact will, in turn, have a stream of feedback impacts on the original county. The spillover and feedback estimates are rooted in data on the actual trade flows between counties and, therefore, tend to have the most pronounced impact in the counties with the largest economies.

For each county, we report the Nation’s direct contribution, actual vendor purchases, and estimates of the impacts and feedback from changes to vendor purchases and household income. Each is summarized and presented below.

All Sources of Economic Activity	
CN Direct Contribution	Direct economic impact from operations; specifically includes production from internal operations, employment at the location of the job, and income at the location of the job.
CN Vendor Purchases	Value of the goods and services purchased by a CN/CNB entity from a local vendor; measured at the location of the vendor.
CN Vendor Response and Feedback Impacts	Measures indirect economic activity resulting from the change in activity by the vendor, including feedback effects; measured and reported for the county in which the vendor is located.
CN Employee & Vendor Spending and Feedback Impacts	Measures the economic activity generated by households as they spend a portion of their income locally; measured at the county of residence of the employee.

¹ Impact models are built and estimated using the Implan software. [IMPLAN | Economic Impact Analysis Software](#)

Economic Impacts by County

		Adair County: Cherokee Nation Economic Impact			
		Output	Employment	Income	
Cherokee Nation operations directly produced and sold nearly \$51.1m in goods and services in Adair County. The operations employed 878 local workers and provided \$71.3m in household income to county residents. Local purchases of nearly \$25.9m generated downstream impacts, supporting nearly \$7.3m in county production, 289 jobs, and \$8.9m in county income. As local households spent a portion of Cherokee Nation income in their communities, additional impacts of nearly \$28.7m in output, 194 jobs, and nearly \$6.6m in income were realized. Cherokee Nation impacts in Adair County total nearly \$112.9m in output, 1,361 jobs, and \$86.8m in labor income.	Direct	CN Direct Contribution	\$ 51,063,944	878	\$ 71,333,991
		CN Vendor Purchases	\$ 25,866,711		
	Indirect	CN Vendor Response and Feedback Effects	\$ 7,280,900	289	\$ 8,912,247
		CN & Vendor Employee Spending	\$ 28,652,315	194	\$ 6,587,254
	Induced	Response and Feedback Effects			
		Total	\$ 112,863,870	1,361	\$ 86,833,493

		Cherokee County: Cherokee Nation Economic Impact			
		Output	Employment	Income	
Cherokee Nation operations directly produced and sold \$44.2m in goods and services in Cherokee County. The operations employed 9,282 local workers and provided \$245.4m in household income to county residents. Local vendor purchases of \$189.5m generated downstream impacts, supporting nearly \$37.2m in county production, 1,776 jobs, and nearly \$80.6m in county income. As local households spent a portion of Cherokee Nation income in their communities, additional impacts of \$147.2m in output, 958 jobs, and \$31.5m in income were realized. Cherokee Nation impacts in Cherokee County total nearly \$418.2m in output, 12,015 jobs, and \$357.5m in labor income.	Direct	CN Direct Contribution	\$ 44,210,412	9,282	\$ 245,415,829
		CN Vendor Purchases	\$ 189,514,639		
	Indirect	CN Vendor Response and Feedback Effects	\$ 37,189,882	1,776	\$ 80,560,432
		CN & Vendor Employee Spending	\$ 147,236,364	958	\$ 31,515,563
	Induced	Response and Feedback Effects			
		Total	\$ 418,151,297	12,015	\$ 357,491,825

Cherokee Nation operations directly produced and sold \$150.6k in goods and services in Craig County. The operations employed 262 local workers and provided \$12m in household income to county residents.

Craig County: Cherokee Nation Economic Impact				
		Output	Employment	Income
Direct	CN Direct Contribution	\$ 150,632	262	\$ 12,043,876
	CN Vendor Purchases	\$ 13,644,353		
Indirect	CN Vendor Response and Feedback Effects	\$ 1,472,038	151	\$ 8,647,080
	CN & Vendor Employee Spending	\$ 9,795,885	64	\$ 2,594,890
Induced		Response and Feedback Effects		
Total		\$ 25,062,908	477	\$ 23,285,846

Local vendor purchases of \$13.6m generated downstream impacts, supporting nearly \$1.5m in county production, 151 jobs, and \$8.6m in county income. As local households spent a portion of Cherokee Nation income in their communities, additional impacts of nearly \$9.8m in output, 64 jobs, and nearly \$2.6m in income were realized. Cherokee Nation impacts in Craig County total nearly \$25.1m in output, 477 jobs, and nearly \$23.3m in labor income.

Cherokee Nation operations directly produced and sold \$195.1m in goods and services in Delaware County. The operations employed 730 local workers and provided \$40.9m in household income to county residents.

Delaware County: Cherokee Nation Economic Impact				
		Output	Employment	Income
Direct	CN Direct Contribution	\$ 195,106,981	730	\$ 40,916,524
	CN Vendor Purchases	\$ 15,121,117		
Indirect	CN Vendor Response and Feedback Effects	\$ 3,945,785	155	\$ 6,883,490
	CN & Vendor Employee Spending	\$ 28,033,857	197	\$ 6,938,879
Induced		Response and Feedback Effects		
Total		\$ 242,207,740	1,082	\$ 54,738,893

Local vendor purchases of \$15.1m generated downstream impacts, supporting \$3.9m in county production, 155 jobs, and nearly \$6.9m in county income. As local households spent a portion of Cherokee Nation income in their communities, additional impacts of \$28m in output, 197 jobs, and \$6.9m in income were realized. Cherokee Nation impacts in Delaware County total \$242.2m in output, 1,082 jobs, and \$54.7m in labor income.

Cherokee Nation operations directly produced and sold nearly \$10.7m in goods and services in Mayes County. The operations employed 514 local workers and provided \$38m in household income to county residents.

Mayes County: Cherokee Nation Economic Impact					
		Output	Employment	Income	
Direct	CN Direct Contribution	\$ 10,656,101	514	\$ 38,032,119	
	CN Vendor Purchases	\$ 44,362,377			
Indirect	CN Vendor Response and Feedback Effects	\$ 11,920,831	359	\$ 18,888,983	
	CN & Vendor Employee Spending	\$ 27,961,786	178	\$ 7,246,071	
Induced	Response and Feedback Effects				
	Total	\$ 94,901,095	1,051	\$ 64,167,172	

Local vendor purchases of nearly \$44.4m generated downstream impacts, supporting \$11.9m in county production, 359 jobs, and nearly \$18.9m in county income. As local households spent a portion of Cherokee Nation income in their communities, additional impacts of nearly \$28m in output, 178 jobs, and \$7.2m in income were realized. Cherokee Nation impacts in Mayes County total \$94.9m in output, 1,051 jobs, and nearly \$64.2m in labor income.

Cherokee Nation did not have direct operations in McIntosh County but provided \$762.5k in household income to county residents. Local vendor purchases of nearly \$1.9m generated downstream impacts, supporting nearly \$605.3k in county production, 24 jobs, and nearly \$741.9k in county income. As local households spent a portion of Cherokee Nation income in their communities, additional impacts of nearly \$2.1m in output, 15 jobs, and \$540.9k in income were realized. Cherokee Nation impacts in McIntosh County total nearly \$4.6m in output, 39 jobs, and \$2m in labor income.

McIntosh County: Cherokee Nation Economic Impact					
		Output	Employment	Income	
Direct	CN Direct Contribution			\$ 762,533	
	CN Vendor Purchases	\$ 1,850,003			
Indirect	CN Vendor Response and Feedback Effects	\$ 605,270	24	\$ 741,885	
	CN & Vendor Employee Spending	\$ 2,123,808	15	\$ 540,927	
Induced	Response and Feedback Effects				
	Total	\$ 4,579,081	39	\$ 2,045,345	

Cherokee Nation operations directly produced and sold \$36.2m in goods and services in Muskogee County. The operations employed 210 local workers and provided nearly \$49.7m in household income

Muskogee County: Cherokee Nation Economic Impact				
		Output	Employment	Income
Direct	CN Direct Contribution	\$ 36,203,816	210	\$ 49,652,233
	CN Vendor Purchases	\$ 19,168,708		
Indirect	CN Vendor Response and Feedback Effects	\$ 9,466,907	156	\$ 9,826,005
	CN & Vendor Employee Spending	\$ 42,893,800	279	\$ 12,474,091
Induced	Response and Feedback Effects			
	Total	\$ 107,733,231	645	\$ 71,952,330

to county residents. Local vendor purchases of nearly \$19.2m generated downstream impacts, supporting nearly \$9.5m in county production, 156 jobs, and \$9.8m in county income. As local households spent a portion of Cherokee Nation income in their communities, additional impacts of nearly \$42.9m in output, 279 jobs, and nearly \$12.5m in income were realized. Cherokee Nation impacts in Muskogee County total \$107.7m in output, 645 jobs, and nearly \$72m in labor income.

Cherokee Nation operations directly produced and sold \$24m in goods and services in Nowata County. The operations employed 227 local workers and provided nearly \$6.9m in household income to county

Nowata County: Cherokee Nation Economic Impact				
		Output	Employment	Income
Direct	CN Direct Contribution	\$ 24,015,032	227	\$ 6,865,882
	CN Vendor Purchases	\$ 5,495,018		
Indirect	CN Vendor Response and Feedback Effects	\$ 820,144	62	\$ 1,410,243
	CN & Vendor Employee Spending	\$ 3,446,098	20	\$ 815,563
Induced	Response and Feedback Effects			
	Total	\$ 33,776,291	310	\$ 9,091,688

residents. Local vendor purchases of nearly \$5.5m generated downstream impacts, supporting \$820.1k in county production, 62 jobs, and \$1.4m in county income. As local households spent a portion of Cherokee Nation income in their communities, additional impacts of \$3.4m in output, 20 jobs, and nearly \$815.6k in income were realized. Cherokee Nation impacts in Nowata County total nearly \$33.8m in output, 310 jobs, and nearly \$9.1m in labor income.

Cherokee Nation did not have direct operations in Ottawa County but provided nearly \$6m in household income to county residents. Local vendor purchases of nearly \$8m generated downstream impacts, supporting \$1.3m in county production, 81 jobs, and nearly \$4m in county income. As local households spent a portion of Cherokee Nation income in their communities, additional impacts of \$4.8m in output, 33 jobs, and nearly \$1.5m in income were realized. Cherokee Nation impacts in Ottawa County total nearly \$14.1m in output, 114 jobs, and \$11.4m in labor income.

Ottawa County: Cherokee Nation Economic Impact					
		Output	Employment	Income	
Direct	CN Direct Contribution			\$	5,975,580
	CN Vendor Purchases	\$ 7,958,142			
Indirect	CN Vendor Response and Feedback Effects	\$ 1,302,068	81	\$	3,974,200
	CN & Vendor Employee Spending	\$ 4,837,092	33	\$	1,489,148
Induced	Response and Feedback Effects				
	Total	\$ 14,097,301	114	\$	11,438,928

Cherokee Nation operations directly produced and sold \$451.3m in goods and services in Rogers County. The operations employed 903 local workers and provided \$51.4m in household income to county residents.

Rogers County: Cherokee Nation Economic Impact					
		Output	Employment	Income	
Direct	CN Direct Contribution	\$ 451,338,702	903	\$	51,419,594
	CN Vendor Purchases	\$ 29,248,089			
Indirect	CN Vendor Response and Feedback Effects	\$ 6,223,983	246	\$	14,620,559
	CN & Vendor Employee Spending	\$ 33,546,666	218	\$	8,160,226
Induced	Response and Feedback Effects				
	Total	\$ 520,357,440	1,367	\$	74,200,379

Local vendor purchases of \$29.2m generated downstream impacts, supporting \$6.2m in county production, 246 jobs, and \$14.6m in county income. As local households spent a portion of Cherokee Nation income in their communities, additional impacts of \$33.5m in output, 218 jobs, and nearly \$8.2m in income were realized. Cherokee Nation impacts in Rogers County total nearly \$520.4m in output, 1,367 jobs, and nearly \$74.2m in labor income.

Cherokee Nation operations directly produced and sold \$103m in goods and services in Sequoyah County. The operations employed 879 local workers and provided nearly \$59.5m in household income

Sequoyah County: Cherokee Nation Economic Impact					
			Output	Employment	Income
Direct	CN Direct Contribution	\$	103,008,267	879	\$ 59,462,715
	CN Vendor Purchases	\$	20,828,747		
Indirect	CN Vendor Response and Feedback Effects	\$	4,872,072	202	\$ 9,813,198
	CN & Vendor Employee Spending	\$	38,770,731	263	\$ 9,603,854
Induced					
Response and Feedback Effects					
Total		\$	167,479,816	1,344	\$ 78,879,767

to county residents. Local vendor purchases of \$20.8m generated downstream impacts, supporting nearly \$4.9m in county production, 202 jobs, and \$9.8m in county income. As local households spent a portion of Cherokee Nation income in their communities, additional impacts of nearly \$38.8m in output, 263 jobs, and \$9.6m in income were realized. Cherokee Nation impacts in Sequoyah County total nearly \$167.5m in output, 1,344 jobs, and nearly \$78.9m in labor income.

Cherokee Nation operations directly produced and sold \$913m in goods and services in Tulsa County. The operations employed 441 local workers and provided \$162.1m in household income to county residents.

Tulsa County: Cherokee Nation Economic Impact					
			Output	Employment	Income
Direct	CN Direct Contribution	\$	913,145,849	441	\$ 162,142,530
	CN Vendor Purchases	\$	129,990,605		
Indirect	CN Vendor Response and Feedback Effects	\$	53,429,440	969	\$ 75,325,560
	CN & Vendor Employee Spending	\$	227,157,871	1,272	\$ 77,176,789
Induced					
Response and Feedback Effects					
Total		\$	1,323,723,765	2,682	\$ 314,644,879

Local vendor purchases of nearly \$130m generated downstream impacts, supporting \$53.4m in county production, 969 jobs, and \$75.3m in county income. As local households spent a portion of Cherokee Nation income in their communities, additional impacts of nearly \$227.2m in output, 1,272 jobs, and nearly \$77.2m in income were realized. Cherokee Nation impacts in Tulsa County total \$1.3b in output, 2,682 jobs, and \$314.6m in labor income.

Cherokee Nation did not have direct operations in Wagoner County but provided nearly \$30.2m in household income to county residents. Local vendor purchases of \$5.1m generated downstream impacts, supporting

Wagoner County: Cherokee Nation Economic Impact					
		Output	Employment	Income	
Direct	CN Direct Contribution			\$	30,180,845
	CN Vendor Purchases	\$ 5,116,143			
Indirect	CN Vendor Response and Feedback Effects	\$ 1,219,991	54	\$	2,139,035
	CN & Vendor Employee Spending Response and Feedback Effects	\$ 17,306,382	118	\$	3,639,028
Total		\$ 23,642,516	173	\$	35,958,908

\$1.2m in county production, 54 jobs, and \$2.1m in county income. As local households spent a portion of Cherokee Nation income in their communities, additional impacts of \$17.3m in output, 118 jobs, and \$3.6m in income were realized. Cherokee Nation impacts in Wagoner County total \$23.6m in output, 173 jobs, and nearly \$36m in labor income.

Cherokee Nation operations directly produced and sold nearly \$31.5m in goods and services in Washington County. The operations employed 240 local workers and provided nearly \$10.9m in

Washington County: Cherokee Nation Economic Impact					
		Output	Employment	Income	
Direct	CN Direct Contribution	\$ 31,489,231	240	\$	10,895,589
	CN Vendor Purchases	\$ 13,464,729			
Indirect	CN Vendor Response and Feedback Effects	\$ 1,498,825	142	\$	8,968,630
	CN & Vendor Employee Spending Response and Feedback Effects	\$ 7,920,771	49	\$	2,477,602
Total		\$ 54,373,556	431	\$	22,341,821

household income to county residents. Local vendor purchases of nearly \$13.5m generated downstream impacts, supporting nearly \$1.5m in county production, 142 jobs, and nearly \$9m in county income. As local households spent a portion of Cherokee Nation income in their communities, additional impacts of \$7.9m in output, 49 jobs, and nearly \$2.5m in income were realized. Cherokee Nation impacts in Washington County total nearly \$54.4m in output, 431 jobs, and nearly \$22.3m in labor income.

The table below summarizes the total economic impact of the Cherokee Nation on the 14-county tribe reservation. The Cherokee Nation directly produces and sells goods and services valued at \$1.86 billion on the reservation while purchasing an additional \$521.6 million in goods and services from local companies in the community. The Nation offers direct employment to 14,567 individuals in the regional labor market, directly sending \$785 million in compensation to local households.

The multiplier impacts as Cherokee Nation vendors increase demand on their upstream suppliers. As households increase demand from local stores and service providers, it adds another \$760.9 million in local production while supporting an additional 8,524 jobs and \$422 million in labor income.

In total, the Cherokee Nation's impact from FY 2023 operations total more than \$3.1 billion while supporting 23,091 jobs and more than \$1.2 billion in local household income.

All Counties: Cherokee Nation Economic Impact				
		Output	Employment	Income
Direct	CN Direct Contribution	\$ 1,860,388,969	14,567	\$ 785,099,840
	CN Vendor Purchases	\$ 521,629,379		
Indirect	CN Vendor Response and Feedback Effects	\$ 141,248,135	4,667	\$ 250,711,548
Induced	CN & Vendor Employee Spending Response and Feedback Effects	\$ 619,683,425	3,857	\$ 171,259,884
Total		\$ 3,142,949,907	23,091	\$ 1,207,071,272