



THE ECONOMIC IMPACT OF THE
CHEROKEE NATION: FISCAL YEAR
2021 REPORT



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THE ECONOMIC IMPACT GROUP

Executive Summary and Key Findings

Cherokee Nation's government and business operations provide substantial economic opportunities to northeast Oklahoma counties. Some economic impacts are tangible and straightforwardly estimated. These include changes in regional employment, labor income, and local production of goods and services. Some economic impacts are less easily calculated but just as real and just as important. These include productivity gains from increasing education, improved health outcomes and social assistance. Though this economic impact report focuses on the former set of impacts, it should not distract the reader from the reality and significance of the latter.

Cherokee Nation's economic influence in northeast Oklahoma has grown since our last report from fiscal year 2018. Annual operations by the Cherokee Nation support \$3 billion in local production of goods and services, reflecting the Cherokee Nation's direct and spillover new demand for local construction services, manufactured products, professional and business services, health services, and more. Production of the \$3 billion of local goods and services supports 18,942 local jobs, generating regional labor income payments of \$975 million. The economic importance of the Cherokee Nation to northeast Oklahoma continues to grow with the expanding economic footprint of Cherokee operations. The economic importance of the Cherokee Nation was acutely felt in 2021 as the region worked to recover economic ground lost in the pandemic. The same was certainly true for the Cherokee Nation. But through strategic management of tribal and business operations and the management of federal relief funds, the tribe kept payrolls full, distributed direct assistance, provided support in their communities, and grew their economic influence even in difficult conditions.

The impact methodology of this report is focused solely on the impact of the direct Cherokee Nation economic activity originating in the 14-county region of northeast Oklahoma. For example, the employment impacts fail to include the nearly 2,392 Cherokee Nation employees that are located outside the region. Further, while the design of the methodology allows for a very local, county-level estimate of economic impacts, it also imposes a conservative multiplier on the analysis. The economic impacts presented in this report should be viewed as a conservative estimate of the role of the Cherokee Nation in the economy of northeast Oklahoma.

The Cherokee Nation’s total economic influence is spread broadly across their 14-county reservation. The county-specific economic impacts are reported below and sorted by output impact. The output impact represents the total impact to local demand for goods and services produced within the county. Output impacts were greatest in Rogers County, supporting production of more than \$1.1 billion in local goods and services. Much of the increase in Rogers County is attributed to growth in Cherokee Nation Businesses’ federal contracting sector. The significant economic impacts in Tulsa County have much to do with the structure of the regional economy. The density of the city concentrates local vendors in a single location, allowing Cherokee Nation operations in other counties to find support from Tulsa area vendors. Additionally, the robust local economy traps greater economic flows within the economy, offering larger multiplier effects in Tulsa County relative to rural county economies. In contrast, the Nation’s largest relative economic influence is in its home and namesake, Cherokee County. Cherokee County accounts for more than one-third of both the direct and total employment impacts of the Cherokee Nation (5,942 jobs and 8,168 jobs, respectively) while accounting for nearly one-third of the total labor income impacts. The economic impacts are generally significant across the region, with every county experiencing impacts greater than \$10 million in output and 100 jobs supported except Ottawa and McIntosh counties.

Total Economic Impact				
County		Output	Employment	Income
Rogers	\$	1,120,017,682	1,475	\$ 65,950,295
Tulsa	\$	887,108,224	2,720	\$ 289,780,658
Cherokee	\$	337,162,644	8,168	\$ 290,540,870
Delaware	\$	196,160,262	1,116	\$ 40,767,371
Sequoyah	\$	138,520,643	1,404	\$ 63,712,672
Muskogee	\$	102,801,709	887	\$ 62,047,561
Adair	\$	91,383,230	1,232	\$ 69,212,239
Mayes	\$	69,084,662	769	\$ 46,927,142
Washington	\$	44,800,880	390	\$ 18,246,462
Nowata	\$	26,941,807	262	\$ 7,348,310
Wagoner	\$	15,553,034	117	\$ 3,490,125
Craig	\$	12,578,042	336	\$ 15,071,308
Ottawa	\$	4,998,658	46	\$ 1,712,752
McIntosh	\$	2,173,470	20	\$ 490,381
14-County Total	\$	3,049,284,947	18,942	\$ 975,298,146

The Direct Economic Footprint of the Cherokee Nation

The direct economic footprint of the Cherokee Nation is an estimate of the Nation’s economic influence before accounting for any multiplier, or spillover impacts. It is simply a description of what the Cherokee Nation produces in the 14-county region and what they purchase directly from local vendors. No economic models are required to arrive at the measure of direct economic influence and no multipliers applied. Instead, measures of direct economic contributions represent a careful accounting of what the Cherokee Nation does and what they purchase within each county.

Cherokee Nation direct output impacts are concentrated in those counties where either a Cherokee Nation base of production exists or where the local economy is large enough to naturally account for a large share of Cherokee Nation vendor purchases. Tulsa, Rogers, Cherokee, Delaware and Sequoyah counties combine to account for 90 percent of Cherokee Nation direct output, while Mayes, Muskogee, Adair, Washington and Nowata counties each enjoy direct output impacts of \$20 million or more.

Cherokee Nation Direct Output			
County		Direct Output	Share
Rogers	\$	1,088,417,722	44.7%
Tulsa	\$	639,430,553	26.2%
Cherokee	\$	199,167,889	8.2%
Delaware	\$	169,283,556	6.9%
Sequoyah	\$	104,791,290	4.3%
Adair	\$	62,955,781	2.6%
Muskogee	\$	61,658,611	2.5%
Mayes	\$	42,185,061	1.7%
Washington	\$	34,767,625	1.4%
Nowata	\$	23,866,440	1.0%
Craig	\$	5,443,613	0.2%
Ottawa	\$	1,887,407	0.1%
Wagoner	\$	1,879,874	0.1%
McIntosh	\$	793,611	0.0%
14-County Total	\$	2,436,529,033	100.0%

The portion of the direct output impact that is vendor purchases serve as inputs to county-specific economic impact models. Purchases solicited from Cherokee Nation operators constitute new demand for a good or service from a local vendor. These vendor purchases represent payments to local businesses. The payments reflect a mix of large contracts with major construction companies, utilities or service providers as well as more modest contracts with local suppliers and individual contractors. The vendor, whether big or small, responds to this new demand by proportionately

increasing their demand for inputs to their production process, including new purchases of supplies, materials, labor, etc. This vendor response is an important source of economic impact and is reported for each county in the body of this report.

Direct Cherokee Nation employment is simply an estimate from internal documents and human resource reports of the annual employment levels of the Cherokee Nation by county as measured by the annual distribution of W-2 reports. They do not include estimates of the employment required by the local vendors that support the Cherokee Nation – these employment estimates are included as part of the economic impact calculations. For Cherokee Nation Businesses, direct employment is an estimate of the annual average employee counts for each CNB location aggregated at the county level. For the Cherokee Nation government, the best data-supported estimate of employment is a count of W-2 forms distributed by CN operations in each county. Note that CNB employment for the many workers is a critical source of temporary, seasonal or transitional employment. It is worth emphasizing again the conservative nature of the methodology.

Cherokee Nation Direct Employment		
County	Direct Employment	Share
Cherokee	5,942	52.3%
Rogers	1,100	9.7%
Sequoyah	895	7.9%
Delaware	788	6.9%
Adair	768	6.8%
Muskogee	426	3.7%
Mayes	421	3.7%
Tulsa	379	3.3%
Craig	231	2.0%
Washington	214	1.9%
Nowata	194	1.7%
McIntosh	0	0.0%
Ottawa	0	0.0%
Wagoner	0	0.0%
14-County Total	11,358	100.0%

Cherokee Nation direct employment is greatest in Cherokee County, where 5,942 individuals are supported in the local labor market, accounting for 52.3 percent of the Nation’s direct employment footprint. Cherokee, Rogers, Delaware, Sequoyah and Adair counties combine to account for nearly 84 percent of Cherokee Nation direct employment.

Total direct employment of 11,358 jobs supported in the region fails to account for the nearly 2,392 employees who are working throughout the U.S. and even

globally. In total, the Cherokee Nation's economic activities provide direct employment opportunities, before considering any multiplier impacts, to an estimated 11,358 workers.

Direct Cherokee Nation income impacts are estimated and reported consistently with estimates of direct employment. Income estimates are pulled from internal payroll reports and W-2 distributions with adjustments made for benefits. As such, reported labor income estimates may be better

construed as compensation impacts as they include the estimate value of benefits with matching

Cherokee Nation Direct Income		
County	Direct Income	Share
Cherokee	\$ 203,165,828	33.0%
Tulsa	\$ 131,298,293	21.3%
Adair	\$ 55,894,583	9.1%
Sequoyah	\$ 48,692,472	7.9%
Rogers	\$ 48,307,883	7.9%
Muskogee	\$ 38,700,822	6.3%
Mayes	\$ 33,881,916	5.5%
Delaware	\$ 29,870,685	4.9%
Craig	\$ 10,690,113	1.7%
Washington	\$ 9,046,224	1.5%
Nowata	\$ 5,663,998	0.9%
McIntosh	\$ -	0.0%
Ottawa	\$ -	0.0%
Wagoner	\$ -	0.0%
14-County Total	\$ 615,212,817	100.0%

FICA contributions, retirement benefits, health care benefits, paid vacation, etc. Direct income impacts, like direct employment impacts, are greatest in Cherokee County. Direct income in Cherokee County is estimated at more than \$200 million, accounting for 33 percent of the Cherokee Nation direct income impacts. Direct income (compensation) payments to households and individuals in Cherokee, Rogers, Delaware, Sequoyah and Tulsa counties account for 79 percent of all Cherokee Nation direct income payments in the 14-county region.

Direct income payments are reported for the county in which the job associated with the income is located. The economic impacts that result from income payments – spending on housing, retail, restaurants, medical services, etc. – are more likely realized in the county in which the employee resides rather than where the employee works. A similar measure of direct income to that reported here, but based on the county in which the employee lives and spends their wages, is estimated and used for the purposes of estimating the multiplier impacts from new household spending resulting from Cherokee Nation labor income payments.

Economic Impact Calculations: Key Concepts and Definitions

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.

The process begins by identifying the Cherokee Nation direct economic footprint in each county. The direct impact to output (local production), employment and income was summarized and presented previously. The table below reviews and defines the components of the Cherokee Nation direct economic footprint as defined in this report.

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; for CN operations, budget allocations serve as a proxy for 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 job is located.
Direct Employment	CN and/or CNB employees, both full and part time; direct employment is reported by the county in which the job is located.
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 (includes both full- and part-time employment) and labor income (includes 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

The economic impact concepts and sources of direct economic footprint are defined exactly as in previous reports. However, the impact methodology originally introduced for the 2016 report is again employed for this analysis. A brief review of this process is included below before presenting county-specific economic impacts.

In a single-region methodology, a county’s economy is stimulated by an initial bundle of vendor purchases and/or an initial increase in household income from Cherokee Nation labor payments. The impacts include all spillover, or multiplier activity, that stayed within the county. The impacts reported in studies prior to FY 2016 omitted important spillovers that occurred outside the original county but within the Cherokee Nation jurisdiction. The impacts also omitted all feedback effects from spillovers back into the original county.

To capture these previously omitted impacts, multiregional input-output models were developed for each county, explicitly linking via estimated trade flows the economy of one county with that of every other Cherokee Nation county. Consider as an example the relationship between Cherokee County and Rogers County in a simple two-region model. Cherokee Nation vendor purchases from vendors in Rogers County serve as a source of direct economic influence in Rogers County. As vendors respond to this new demand, additional economic activity is realized. A portion of this new economic activity will occur outside of Rogers County, with some of the activity realized in Cherokee County. These spillover impacts into Cherokee County are now estimated, recorded and reported

with the impact estimates in Cherokee County. This newly captured activity may induce feedback effects supporting additional economic activity in Rogers County. These feedback effects are now estimated, recorded and reported with the Rogers County impacts. Thus, for both vendor purchases and household spending, there are two new sources of impacts captured – feedback impacts and county spillover impacts – that were not available using the single region models in previous reports.

The multiregional modeling approach brings to light economic impacts that were known to exist but were unaccounted for in previous reports. This methodological innovation advances the understanding of the importance of Cherokee Nation activity on the regional economy. Not surprisingly, the effect of the methodological improvement is most pronounced in Tulsa County and other large economies. These larger economies are most likely to capture some of the previously omitted economic linkages while also benefiting from stronger economic feedbacks. The sources and definitions of economic activity reported for each county are 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.

Total economic impacts are estimated and reported for each source of economic activity above. While the multiregional approach employed in this report disproportionately benefits counties that serve as regional trade hubs, all counties benefit from this more complete capture of economic activity. The economic influence of the Cherokee Nation not only provides economic opportunity in each county but serves more broadly to connect the regional economies together.

County Specific Economic Impact Summaries

Adair County: Cherokee Nation Economic Impact				
		Output	Employment	Income
Direct	CN Direct Contribution	\$ 39,973,168	768	\$ 55,894,583
	CN Vendor Purchases	\$ 22,982,613		
Indirect	CN Vendor Response and Feedback Effects	\$ 7,046,196	303	\$ 7,985,405
Induced	CN & Vendor Employee Spending Response and Feedback Effects	\$ 21,381,253	161	\$ 5,332,251
Total		\$ 91,383,230	1,232	\$ 69,212,239

Cherokee Nation business and government operations directly produce nearly \$40 million of goods and services in Adair County while purchasing another \$23 million of goods and services from local vendors. Income payments to Adair County households and purchases from Adair County vendors set in motion secondary, or spillover, economic activity. In total, the Cherokee Nation economic influence in Adair County reaches more than \$91 million in county output and 1,232 jobs with nearly \$70 million in Adair County income.

Cherokee County: Cherokee Nation Economic Impact				
		Output	Employment	Income
Direct	CN Direct Contribution	\$ 42,111,654	5,942	\$ 203,165,828
	CN Vendor Purchases	\$ 157,056,235		
Indirect	CN Vendor Response and Feedback Effects	\$ 34,305,995	1,510	\$ 64,409,342
Induced	CN & Vendor Employee Spending Response and Feedback Effects	\$ 103,688,760	716	\$ 22,965,700
Total		\$ 337,162,644	8,168	\$ 290,540,870

Cherokee Nation business directly produce more than \$42 million in Cherokee County goods and services while the tribes business and government operations directly purchase an additional \$157 million from county vendors. The tribe directly provides employment to 5,942 county residents providing more than \$203 million in direct household compensation. The payments made to households and purchases from vendors are the catalyst for additional layers of economic activity. In total, Cherokee Nation operations support more than \$337 million in county output of goods and services while supporting 8,168 jobs and more than \$290 million in household income.

Craig County: Cherokee Nation Economic Impact					
		Output	Employment	Income	
Direct	CN Direct Contribution		231	\$	10,690,113
	CN Vendor Purchases	\$ 5,443,613			
Indirect	CN Vendor Response and Feedback Effects	\$ 1,415,386	62	\$	2,774,232
Induced	CN & Vendor Employee Spending Response and Feedback Effects	\$ 5,719,043	43	\$	1,606,963
Total		\$ 12,578,042	336	\$	15,071,308

The Cherokee Nation has a limited direct footprint in Craig County providing employment opportunities to 231 residents and household compensation of nearly \$11 million. Despite a limited direct presence, the tribe purchased more than \$5 million from Craig County vendors. Payment to households and purchases from vendors set in motion secondary economic activity. In total, Cherokee Nation economic activity supports nearly \$13 million in county output, 336 jobs, and \$15 million in household income.

Delaware County: Cherokee Nation Economic Impact					
		Output	Employment	Income	
Direct	CN Direct Contribution	\$ 156,408,754	788	\$ 29,870,685	
	CN Vendor Purchases	\$ 12,874,802			
Indirect	CN Vendor Response and Feedback Effects	\$ 4,340,729	164	\$ 5,488,106	
Induced	CN & Vendor Employee Spending Response and Feedback Effects	\$ 22,535,977	164	\$ 5,408,580	
Total		\$ 196,160,262	1,116	\$ 40,767,371	

The Cherokee Nation has a substantial direct economic influence in Delaware County producing more than \$156 million in goods and services and providing direct employment to 788 workers. Additionally, Cherokee Nation business and government operations purchase nearly \$13 million from county vendors. The purchases from vendors and payments to households spur additional spending and economic activity. In total, the Cherokee Nation supports more than \$196 million in county produced goods and services and 1,116 jobs with an associated \$41 million in labor income.

Mayes County: Cherokee Nation Economic Impact					
		Output	Employment	Income	
Direct	CN Direct Contribution	\$ 21,131,983	421	\$	33,881,916
	CN Vendor Purchases	\$ 21,053,078			
Indirect	CN Vendor Response and Feedback Effects	\$ 6,725,513	208	\$	7,744,176
Induced	CN & Vendor Employee Spending Response and Feedback Effects	\$ 20,174,088	140	\$	5,301,050
Total		\$ 69,084,662	769	\$	46,927,142

The Cherokee Nation directly produces more than \$21 million in output while providing 421 jobs and nearly \$34 million to households in Mayes County. The tribe makes another \$21 million in direct purchases from Mayes County vendors. The vendor purchases and household income payments are the catalyst for additional rounds of economic activity in the county. In total, Cherokee Nation economic activity supports more than \$69 million in Mayes County production and 769 county jobs representing nearly \$47 million in labor income.

McIntosh County: Cherokee Nation Economic Impact					
		Output	Employment	Income	
Direct	CN Direct Contribution		0	\$	-
	CN Vendor Purchases	\$ 793,611			
Indirect	CN Vendor Response and Feedback Effects	\$ 347,450	13	\$	227,984
Induced	CN & Vendor Employee Spending Response and Feedback Effects	\$ 1,032,409	7	\$	262,397
Total		\$ 2,173,470	20	\$	490,381

The direct economic impact of the Cherokee Nation in McIntosh County is limited to direct purchases from McIntosh County vendors and payments made to workers in McIntosh County households. As households and vendors respond to these inflows additional economic activity occurs. In total, the Cherokee Nation supports more than \$2 million in county output, 20 jobs, and nearly half a million dollars in labor income.

Muskogee County: Cherokee Nation Economic Impact				
		Output	Employment	Income
Direct	CN Direct Contribution	\$ 34,255,469	426	\$ 38,700,822
	CN Vendor Purchases	\$ 27,403,142		
Indirect	CN Vendor Response and Feedback Effects	\$ 9,943,427	243	\$ 14,091,998
Induced	CN & Vendor Employee Spending Response and Feedback Effects	\$ 31,199,671	218	\$ 9,254,741
Total		\$ 102,801,709	887	\$ 62,047,561

The Cherokee Nation has a significant presence in Muskogee County with direct production of more than \$34 million in goods and services and another \$27 million in purchases from county vendors. The nation directly employed 426 workers while providing income of nearly \$39 million to county households. The vendor purchases and labor payments prompt a response that in turn generates additional economic activity. In total, the Cherokee Nation supports nearly \$103 million in county production while supporting 887 jobs with associated labor income of more than \$62 million.

Nowata County: Cherokee Nation Economic Impact						
			Output	Employment		Income
Direct	CN Direct Contribution	\$	19,687,293	194	\$	5,663,998
	CN Vendor Purchases	\$	4,179,147			
Indirect	CN Vendor Response and Feedback Effects	\$	967,699	55	\$	1,165,219
Induced	CN & Vendor Employee Spending Response and Feedback Effects	\$	2,107,668	13	\$	519,093
Total		\$	26,941,807	262	\$	7,348,310

The Cherokee Nation has a modest but important presence in Nowata County providing direct employment to 194 workers producing nearly \$20 million in local production. The tribe directly pays nearly \$6 million in labor income while directly purchasing more than \$4 million in vendor purchases. As vendors respond to demand from tribal partners and as households spend a portion of their labor income in the county, additional economic gains are realized. In total, the Cherokee Nation supports nearly \$276 million in Nowata County production and 262 jobs with household compensation of more than \$7 million.

Ottawa County: Cherokee Nation Economic Impact					
		Output	Employment	Income	
Direct	CN Direct Contribution		0	\$	-
	CN Vendor Purchases	\$ 1,887,407			
Indirect	CN Vendor Response and Feedback Effects	\$ 403,546	26	\$	945,733
Induced	CN & Vendor Employee Spending Response and Feedback Effects	\$ 2,707,705	20	\$	767,019
Total		\$ 4,998,658	46	\$	1,712,752

The Cherokee Nation has a limited direct influence on the Ottawa County economy with no direct production of goods and services. The tribe does purchase nearly \$2 million of goods and services from local vendors and does provide jobs and income to households that live in Ottawa County. As these households bring their paychecks home and spend a portion in the local economy, significant economic activity results. In total, the Cherokee Nation has a nearly \$5 million impact on the local economy, supporting 46 jobs and \$1.7 million in labor income.

Rogers County: Cherokee Nation Economic Impact				
		Output	Employment	Income
Direct	CN Direct Contribution	\$ 1,067,378,487	1,100	\$ 48,307,883
	CN Vendor Purchases	\$ 21,039,236		
Indirect	CN Vendor Response and Feedback Effects	\$ 4,236,480	187	\$ 10,712,025
Induced	CN & Vendor Employee Spending Response and Feedback Effects	\$ 27,363,479	188	\$ 6,930,387
Total		\$ 1,120,017,682	1,475	\$ 65,950,295

The Cherokee Nation is a significant driver of economic activity in Rogers County. The tribe directly employed 1,100 workers in the county while providing labor income of more than \$48 million. The tribe directly produced more than \$1 billion in goods and services with much of the growth attributed to a federal contract providing services outside the state. The tribe purchased an additional \$21 million from local vendors with these vendor purchases and household income payments setting in motion additional rounds of economic activity. In total, the Cherokee Nation directly supports more than \$1.1 billion in local production while supporting 1,475 jobs and providing nearly \$66 million in labor income.

Sequoyah County: Cherokee Nation Economic Impact				
		Output	Employment	Income
Direct	CN Direct Contribution	\$ 83,072,615	895	\$ 48,692,472
	CN Vendor Purchases	\$ 21,718,675		
Indirect	CN Vendor Response and Feedback Effects	\$ 7,160,982	292	\$ 8,477,486
Induced	CN & Vendor Employee Spending Response and Feedback Effects	\$ 26,568,371	217	\$ 6,542,714
Total		\$ 138,520,643	1,404	\$ 63,712,672

The Cherokee Nation is responsible for more than \$100 million in Sequoyah County production with \$83 million being produced directly by the tribe and nearly \$22 million in purchases from county vendors. The Cherokee Nation provides direct employment opportunities to 895 county residents paying nearly \$49 million in household income. The vendor purchases and household spending represent new demand in the county and spur additional rounds of economic activity. In total, the Cherokee Nation supports more than \$138 million in county output, 1,404 county jobs, and nearly \$64 million in household income.

Tulsa County: Cherokee Nation Economic Impact				
		Output	Employment	Income
Direct	CN Direct Contribution	\$ 476,274,471	379	\$ 131,298,293
	CN Vendor Purchases	\$ 163,156,082		
Indirect	CN Vendor Response and Feedback Effects	\$ 68,427,704	1,283	\$ 97,604,366
Induced	CN & Vendor Employee Spending Response and Feedback Effects	\$ 179,249,967	1,058	\$ 60,877,999
Total		\$ 887,108,224	2,720	\$ 289,780,658

Tulsa County is the center of the Tulsa MSA and its dense collection of businesses benefit as a key set of vendors for the Cherokee Nation. The tribe has direct production of \$476 million in the county while purchasing \$163 million from Tulsa County vendors. Tulsa is also home to many who work in the Cherokee Nation but spend a portion of their income in the Tulsa economy as reflected in the large induced economic impacts. The vendor purchases and payments to households stimulate significant spillover economic activity. In total, the Cherokee Nation has a more than \$887 million economic impact on the county while supporting 2,720 jobs and nearly \$290 million in household income.

Wagoner County: Cherokee Nation Economic Impact					
		Output	Employment	Income	
Direct	CN Direct Contribution		0	\$	-
	CN Vendor Purchases	\$ 1,879,874			
Indirect	CN Vendor Response and Feedback Effects	\$ 458,938	23	\$	874,462
Induced	CN & Vendor Employee Spending Response and Feedback Effects	\$ 13,214,222	94	\$	2,615,663
Total		\$ 15,553,034	117	\$	3,490,125

The limited direct presence of the Cherokee Nation in Wagoner County can obscure the reality that many workers reside and spend a portion of their income in the county. Additionally, the tribe purchases nearly \$2 million in goods and services from county vendors. The vendor purchases and household income payments spur additional activity. In total, the Cherokee Nation has a \$15.5 million impact on the county economy supporting 117 jobs and nearly \$3.5 million in household income.

Washington County: Cherokee Nation Economic Impact					
		Output	Employment	Income	
Direct	CN Direct Contribution	\$ 24,035,964	214	\$	9,046,224
	CN Vendor Purchases	\$ 10,731,661			
Indirect	CN Vendor Response and Feedback Effects	\$ 1,745,049	119	\$	6,583,360
Induced	CN & Vendor Employee Spending Response and Feedback Effects	\$ 8,288,206	57	\$	2,616,878
Total		\$ 44,800,880	390	\$	18,246,462

The Cherokee Nation directly produces \$24 million within the Washington County economy while purchasing an additional \$10.7 million in goods and services from county vendors. The direct footprint of the tribe in Washington County extends to include 214 jobs and \$9 million in county income. The vendor purchases and household spending prompt additional rounds of economic activity. In total, the Cherokee Nation has a nearly \$45 million impact on Washington County while supporting 390 jobs and \$18 million in household income.