OKLAHOMA BUSINESS LEADERS POLL 2026

THE STATE CHAMBER

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OKLAHOMA BUSINESS ROUNDTABLE

BUSINESS LEADERSHIP ADVANCING OKLAHOMA'S ECONOMY

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STATE CHAMBER RESEARCH FOUNDATION

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ABOUT THE BUSINESS LEADERS POLL

The Business Leaders Poll is Oklahoma's annual pulse check of the business community. A collaborative project of The State Chamber, the Oklahoma Business Roundtable, and The State Chamber Research Foundation, the poll measures the views of business owners and executives on the issues affecting Oklahoma's economy.

The State Chamber of Oklahoma commissioned AlphaROC to conduct a survey of 401 Oklahoma business leaders on the Occam platform between March 17 and April 4, 2026. All interviews were conducted online. The survey carries a margin of error of ±4.9 percentage points at the 95% confidence level. The survey focused on economic conditions, workforce, infrastructure, innovation, and the policy priorities business leaders believe matter most for Oklahoma's competitiveness.

This report presents what business leaders told us and what those findings mean for Oklahoma's ability to grow, attract investment, and compete.

> **"We have to focus on what businesses actually need to invest or expand here – and act accordingly, even if it doesn't score political points."**
>
> **- Survey Participant**

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A LETTER FROM THE LEADERS

Oklahoma's competitiveness depends on execution, not identification, of known priorities.

Oklahoma business leaders enter 2026 with measured confidence. Most believe Oklahoma is moving in the right direction (64%) compared to the national economy, and most businesses plan to hire in the coming year. But the poll also shows that growth is not guaranteed.

Business leaders are pointing to a clear set of competitiveness challenges:

- **Workforce is the dominant concern**: 74% of respondents identified workforce as one of the two most important issues facing business growth.
- **Education and talent pipelines are not keeping pace with employer demand**: 30% say the current workforce meets their needs.
- **Infrastructure gaps are beginning to affect investment decisions**: 40% say infrastructure gaps have delayed business investment or expansion
- **Innovation and technology adoption remain uneven**: five in six business leaders see innovation economy as something less than strong.
- **Business leaders want practical, ROI-driven solutions**: 89% of business leaders think the state needs to prioritize funding and resources for improved education outcomes.

The message is clear: **Oklahoma has momentum. The next step is turning that momentum into measurable progress**. Oklahoma does not need to spend the next year identifying the same problems. It needs to execute on the priorities business leaders already recognize.

Sincerely,

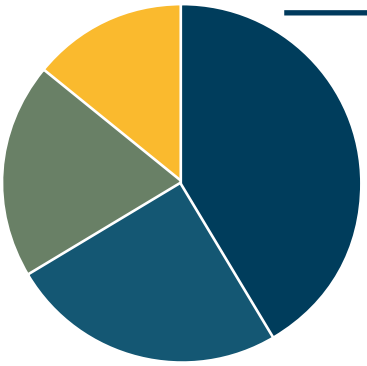
CHAD WARMINGTON
President & CEO
The State Chamber

MARK FUNKE
President & CEO
Oklahoma Business Roundtable

AMANDA HALL
Policy & Research Director
The State Chamber Research Foundation

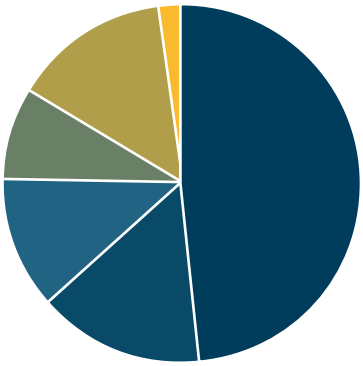
WHO TAKES THE SURVEY?

HEADQUARTERS



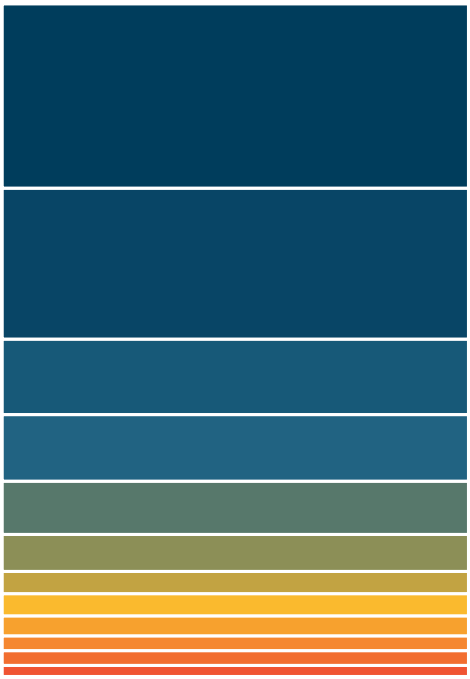
Oklahoma City Metro Area	41.6%
Tulsa Metro Area	24.9%
Rural Oklahoma	19.5%
Out Of State	14.0%

NUMBER OF EMPLOYEES



Under 100	48.6%
100-250	15.0%
251-500	11.7%
501-1,000	8.5%
1,001-10,000	14.2%
Over 10,000	2.0%

INDUSTRY



Health and Education	24.9%
Professional Services	20.4%
Finance / Banking	10.2%
Manufacturing	9.0%
Retail	7.2%
Other / Unknown	5.0%
Construction / Repairs	3.0%
Mining / Extraction	3.0%
Transportation	2.7%
Agriculture	2.0%
Utilities	2.0%
Wholesale Trade	1.5%

WHAT OKLAHOMA BUSINESS LEADERS ARE TELLING US

> **"State leaders should strengthen the foundations every employer relies on: a high-performing K-12 education system and modern, resilient infrastructure."**
>
> **- Survey Participant**

Oklahoma business leaders are optimistic — but they see clear competitiveness risks. The 2026 Business Leaders Poll shows an Oklahoma business community that is optimistic, engaged, and ready to grow. But it also shows that business leaders are clear-eyed about the barriers that could limit the state's long-term competitiveness.

KEY TAKEAWAYS:

- 64% say Oklahoma is moving in the right direction compared to the national economy.
- 81% plan to hire in the coming year.
- 77% identify childcare access as a key workforce participation barrier.

BUILD THE WORKFORCE: Oklahoma cannot compete for better jobs without a stronger people pipeline.

- **74%** name education and workforce as a top issue for business growth.
- **Only 30%** say the current workforce meets their needs well.
- **55%** say Oklahoma high school graduates are not prepared for the workplace.
- **48%** say recruitment and retention are their biggest obstacle to growth.
- Business leaders want practical, scalable solutions:
  - Early reading and math
  - CareerTech
  - Apprenticeships and work-based learning
  - Childcare access
  - Stronger alignment between schools and employers

MODERNIZE GROWTH INFRASTRUCTURE: Infrastructure is not just a public works issue — it is a competitiveness issue.

- **59%** say Oklahoma's infrastructure is worse than competitor states.
- **40%** say infrastructure gaps have delayed investment or expansion.
- Roads, utilities, broadband, housing, and grid capacity are now business growth issues.
- Oklahoma's lower energy costs remain a competitive advantage worth protecting.

STRENGTHEN INNOVATION CAPACITY: Oklahoma's innovation challenge is not interest — it is capacity.

- **One-third** of business leaders describe Oklahoma's innovation economy as weak.
- Only **8%** report enterprise-wide AI and automation adoption
- Barriers are practical, not philosophical:
  - Cybersecurity concerns
  - Talent gaps
  - Cost
  - Unclear return on investment
- Leaders support tools like investor incentives, startup accelerators, R&D credits, and capital access.

COMPETE WITH DISCIPLINE: Business leaders are not anti-investment — they want public dollars tied to economic return.

- **61%** say Oklahoma must use business incentives to compete with other states.
- **Only 7%** favor eliminating incentives altogether.
- About half say they pay roughly the right amount in taxes.
- **60%** favor investing record state savings in public priorities over returning the money through tax cuts.

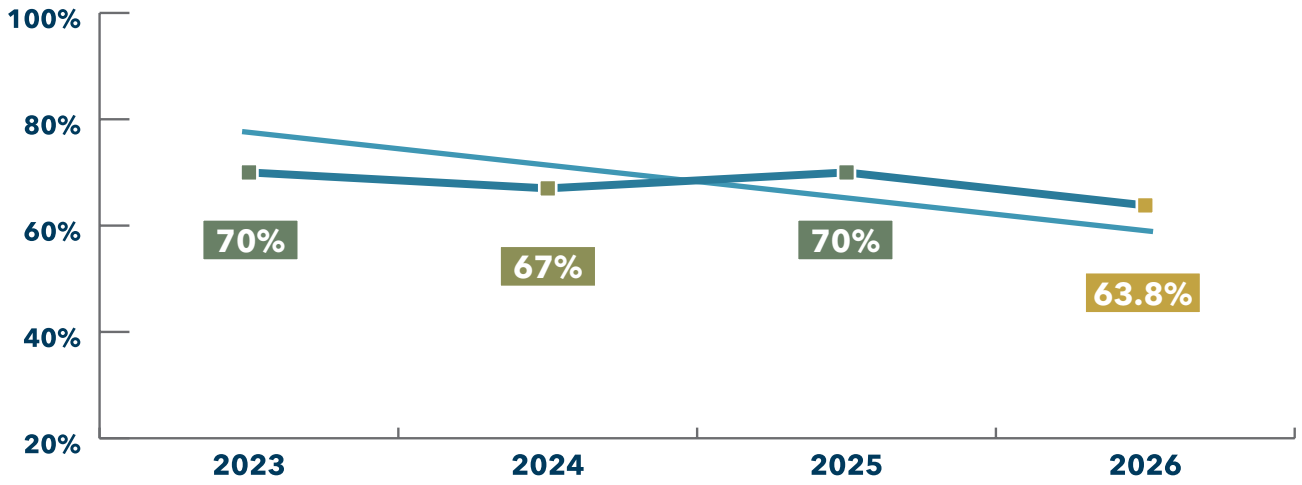
Oklahoma business leaders are ready to grow. The question is whether the state is ready to match their ambition.

ECONOMIC CLIMATE:
PRO-GROWTH, NOT ANTI-INVESTMENT

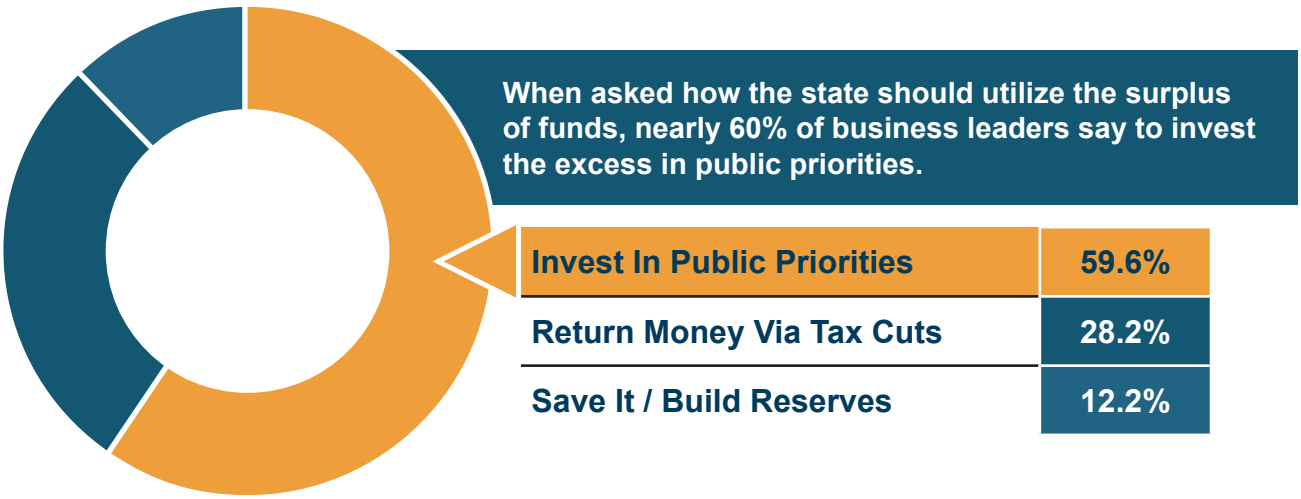
BOTTOM LINE: **Business leaders value Oklahoma's low-cost, pro-business position — but they also want strategic public investment.**

Business leaders continue to see Oklahoma's economic climate as a relative strength. Taxes and regulations are not viewed as the state's most urgent barriers to growth. Instead, leaders are signaling that Oklahoma's next competitiveness gains will come from protecting its pro-business foundation while making strategic investments in workforce, infrastructure, and innovation.

IS OKLAHOMA ON THE RIGHT ECONOMIC TRACK?



Business leaders are not asking Oklahoma to spend less. They are asking the state to spend smarter. When asked how the state should utilize the surplus of funds, nearly 60% of business leaders say to invest the excess in public priorities.

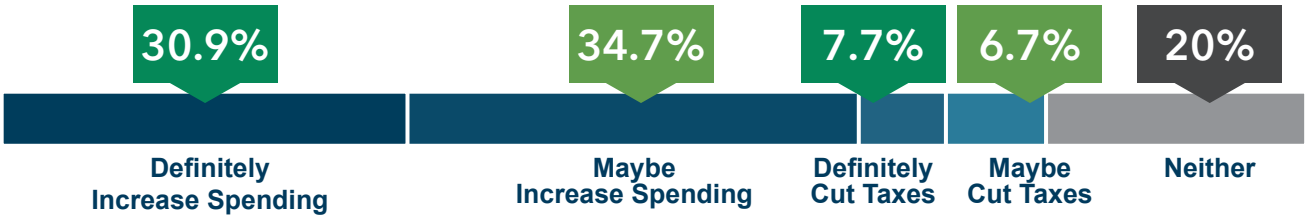


WOULD YOU RATHER....

Cut Taxes **OR** **Increase Spending on...**

EDUCATION

INFRASTRUCTURE



Business leaders are not asking for spending for its own sake. They are asking Oklahoma to invest where the return is clear: stronger workforce outcomes, better infrastructure, and long-term competitiveness.

KEY TAKEAWAYS:

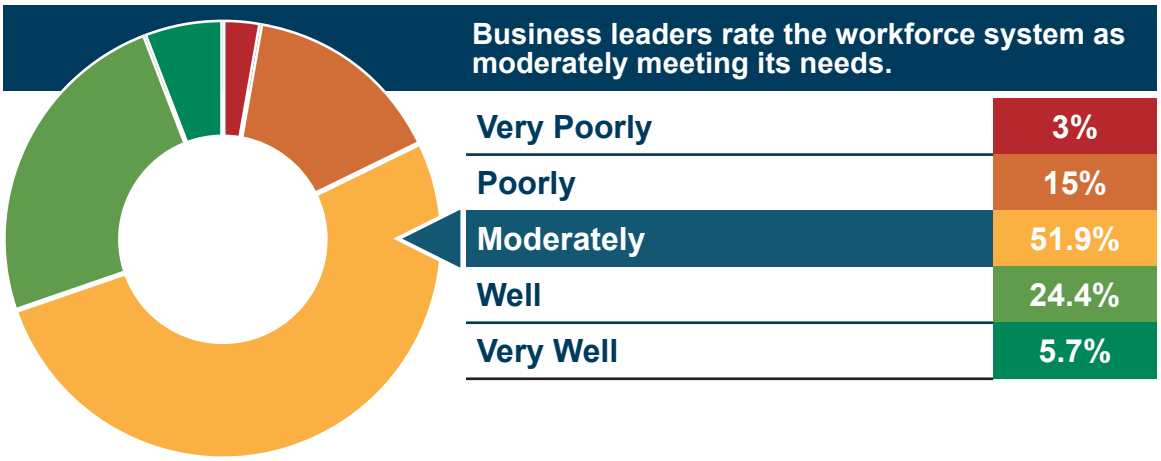
Oklahoma's greatest risk is not economic decline — it is underperformance.

- Most business leaders do not see taxes as their top barrier to growth.
- 61% believe Oklahoma must use incentives to compete with other states.
- Nearly 60% prefer investing surplus dollars in public priorities over tax cuts.
- Leaders favor practical investments that strengthen Oklahoma's competitiveness.

WORKFORCE & EDUCATION:
THE DEFINING CONSTRAINT ON GROWTH

BOTTOM LINE: **Oklahoma's biggest growth constraint is talent.**

Workforce dominates every other concern. Nearly three-fourths of business leaders name education and workforce as a top issue for business growth (74%), far ahead of infrastructure (37%), taxes, innovation, or government leadership (38%). The poll shows that businesses are ready to grow and hire (81%), but many do not believe the state's talent pipeline is keeping pace with demand.



HIRING

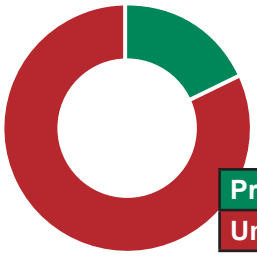
When asked to identify the factors most limiting their ability to hire and retain talent (up to three selections), business leaders pointed to a clear hierarchy:

Barrier	Overall
Recruitment pipeline (not enough candidates)	54%
Retention / turnover	44%
Technical skills gap	43%
Durable / soft skills gap	33%
Entry-level availability	16%
Executive / management availability	12%
Degree attainment	11%

The biggest hiring challenge is not simply finding better applicants. For many employers, it is finding enough applicants at all.

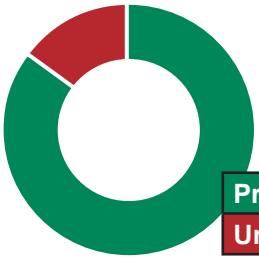
WORKFORCE PREPAREDNESS

Business leaders do not believe Oklahoma's high schools are preparing students for the workforce, but overwhelmingly support Oklahoma's career and technology education system. More respondents this year were undecided or neutral.



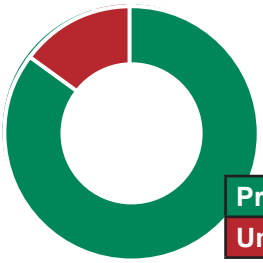
Students graduating **high school** in Oklahoma are well-prepared for success in the workplace.

	2024	2025	2026
Prepared	19%	26%	12.7%
Unprepared	80%	71%	55.1%



Oklahoma's **public universities** do a good job at preparing students for the workforce.

	2024	2025	2026
Prepared	83%	78%	76.8%
Unprepared	16%	20%	13.4%



Oklahoma's **career tech** system does a good job at preparing students for the workforce.

	2024	2025	2026
Prepared	67%	85%	91.5%
Unprepared	31%	12%	4.3%

89% say to prioritize funding for improved educational outcomes, particularly in elementary reading and math.

Business leaders understand that Oklahoma's future workforce starts in the early grades. If students are not reading and doing math at grade level, every later workforce challenge becomes harder to solve.

> "Investing in K-12 education increases the number of students continuing education in college and CareerTech, which becomes our recruitment pipeline."
>
> - Survey Participant

WORKFORCE PARTICIPATION BARRIERS

BOTTOM LINE: **Childcare Is No Longer a Side Issue. It Is a Workforce Issue.**

Business leaders see childcare access as a direct barrier to workforce participation. This finding cuts across geography, industry, and employer size, making it one of the clearest signals in the poll.

Policy	Overall
Childcare Access	**77%**
Benefits Cliff Reform	**39%**
Immigration / Visa Pathways	**34%**
Transportation	**34%**
Workforce Housing	**30%**

CHILDCARE ACCESS IS IN A CATEGORY OF ITS OWN.

At 77%, childcare access is the top workforce participation barrier identified by business leaders. The concern is consistent across industries, regions, and employer sizes, signaling that childcare is not a niche issue. It is a statewide workforce constraint. **This consistency signals not a niche concern, but a fundamental barrier to workforce participation that employers see firsthand**.

KEY TAKEAWAYS:

- Workforce development is the dominant concern, **cited by 74% of leaders as a top growth issue**.
- Only 30% say Oklahoma's workforce currently meets their needs well.
- Hiring challenges are driven more by pipeline and preparedness gaps than wages or benefits.
- Strong consensus on solutions:
  - 97% rate apprenticeships/work-based learning as effective or very effective.
  - 89% support prioritizing funding for early literacy and math outcomes.
  - 77% identify childcare access as a key lever for workforce participation.

INFRASTRUCTURE:
A COMPETITIVE ADVANTAGE WE MUST KEEP EARNING

BOTTOM LINE: Infrastructure gaps may slow investment, if state leaders don't act.

Oklahoma has long benefited from practical infrastructure advantages, including transportation access, affordable energy, and room to grow. But business leaders are warning that this advantage is not automatic. Roads, utilities, broadband, housing, and energy capacity must keep pace with business growth, or infrastructure gaps will begin to slow investment.

How does Oklahoma's physical infrastructure compare to competitor states?

	ALL	OKC	TULSA	RURAL	OUT of STATE
Much Worse	10.0%	9.0%	13.0%	7.7%	10.7%
Worse	49.4%	44.9%	47.0%	57.7%	55.4%
About The Same	32.9%	37.1%	31.0%	29.5%	28.6%
Better	7.2%	8.4%	9.0%	5.1%	3.6%
Much Better	0.5%	0.6%	0.0%	0.0%	1.8%

WHAT'S ACTUALLY AFFECTING OPERATIONS

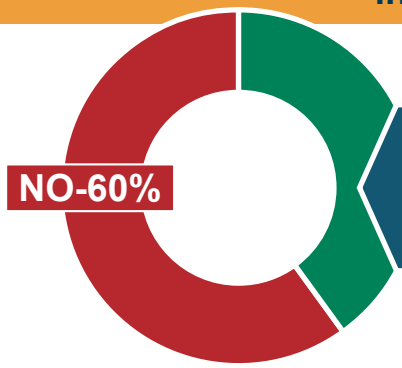
Respondents were asked to identify the three infrastructure systems that most affect their operations. The results reveal both universal pressures and sector-specific vulnerabilities.

Barrier	Overall
Roads / Highways	89%
Utilities	66%
Broadband	60%
Airports	37%
Bridges	35%
Rail / Freight	13%

For rural businesses and agriculture, these challenges are even more pronounced because roads, bridges, broadband, and water systems are not optional; they are how products get to market.

REAL BUSINESS IMPACT: DELAYED INVESTMENT

Have infrastructure limitations delayed your business investment or expansion?



40% of business leaders say infrastructure limitations have delayed investment or expansion.

INVESTMENTS WITH THE BIGGEST IMPACT

Respondents were asked to select the two infrastructure investments they believe would drive the most economic growth. The top four were closely bunched, making this a genuinely competitive field with meaningful geographic and industry-level splits.

Investment Priority	Overall	Highlights
Housing	38%	Top for OKC, Tulsa, Rural and Statewide businesses
Energy Grid	37%	Top for Construction, manufacturing and agriculture industries
Traffic Congestion Relief	35%	OKC concern at 52%
Rural Broadband	27%	Rural concern at 40%
Airports	18%	
Site Readiness	15%	
Water Systems	11%	Double with rural respondents
Freight Logistics	9%	
Other	10%	

KEY TAKEAWAYS:

- **59%** say Oklahoma's infrastructure is worse than competitor states.
- **40%** report infrastructure gaps have delayed investment or expansion.
- Most impactful systems: roads/highways, utilities, and broadband.
- Housing and energy grid investment are seen as highest-leverage growth priorities.
- Energy remains a competitive advantage: **43%** say Oklahoma has lower energy costs than competitors.
- **Infrastructure is viewed as a quiet but material drag on investment decisions.**

INNOVATION AND ENTREPRENEURSHIP:
OKLAHOMA'S LONG-TERM COMPETITIVENESS GAP

BOTTOM LINE: Oklahoma's innovation economy is not yet strong enough to support long-term competitiveness.

Business leaders do not see Oklahoma's innovation economy as broken, but they do not see it as strong enough to compete at the level the future economy will demand. The poll points to an ecosystem that has real assets but lacks scale, capital, and broad technology adoption.

How would you rate Oklahoma's innovation economy, including advanced industry, technology adoption, and R&D?

	General
Very Weak	4.5%
Weak	28.9%
Moderate	47.9%
Strong	16.5%
Very Strong	2.2%

WEAK / VERY WEAK

OKC	Tulsa	Rural	Out of State
29.4%	34%	35.9%	41.1%

Roughly five in six business leaders rate Oklahoma's innovation economy below strong. That should be a warning light on the competitiveness dashboard.

What is your organization's current AI / automation adoption level?

Out-of-State businesses are further along than in state firms. 41% are already operational, while 14% OKC businesses have operational AI, and 18% of rural businesses.

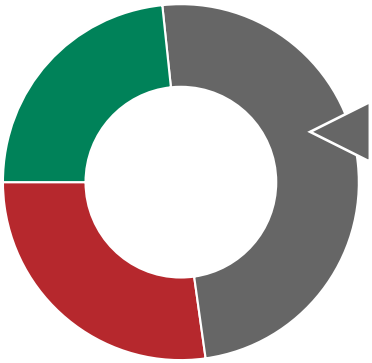
Exploring	36.9%
Piloting	26.2%
Operational	20.2%
Enterprise-wide	8.5%
None	8.2%

BARRIERS TO TECHNOLOGY ADOPTION

Respondents who face barriers to technology adoption were asked to select up to three from a list of six. The results reveal a cluster of roughly co-equal concerns rather than a single dominant obstacle.

Barrier	Overall	Highlights
Cybersecurity Concerns	53%	Larger concern for larger businesses
Talent / Skills Gap	48%	Most common across industry
Cost	47%	More concern in Tulsa and with small businesses
ROI Uncertainty	39%	Multi-state companies report high concern of ROI
Data Readiness	28%	Education, manufacturing and mining's concern
Regulation	20%	Finance and banking sectors' top concern

How accessible is capital in Oklahoma?

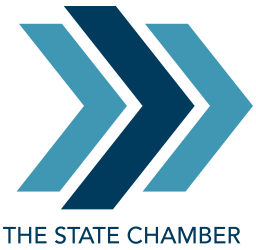


Very Inaccessible or Inaccessible	23.5%
Neutral	49.4%
Very Accessible or Accessible	27.1%

For an economy that aspires to grow its innovation sector, a near-even split between "can't get capital" and "can get capital" — with half the market uncertain or disengaged — describes a thin, uneven ecosystem rather than a functioning one.

KEY TAKEAWAYS:

- About one-third describe Oklahoma's innovation economy as weak or very weak.
- Access to venture/growth capital is limited for roughly 25% of leaders.
- AI adoption remains early-stage: Only 8% report enterprise-wide implementation.
- Barriers are practical, not ideological: cybersecurity concerns, talent shortages, & cost constraints
- Preferred policy supports:
  - 52% favor investor tax incentives
  - 48% support startup accelerators



ABOUT THE STATE CHAMBER

The State Chamber is the leading statewide advocate for business in Oklahoma. We work on behalf of our members, the Oklahoma business community, to affect legislative change and create a pro-growth climate statewide. The State Chamber leverages meaningful partnerships, resources and coalitions to achieve legislative results that strengthen Oklahoma's economy.

www.okstatechamber.com

ABOUT THE OKLAHOMA BUSINESS ROUNDTABLE

The Oklahoma Business Roundtable (BRT) serves as Oklahoma's primary economic development support organization. BRT promotes new business investment throughout Oklahoma, including funding support for start-up, retention, expansion and attraction of business facilities and operations. Formed in 1991, the Roundtable is a 501(c)(6) non-profit, non-partisan corporation.

www.okbusinessroundtable.com

ABOUT THE STATE CHAMBER RESEARCH FOUNDATION

The State Chamber Research Foundation (SCRF) is the business community's think tank. Through high quality research and analysis, SCRF educates policymakers and the public about the virtues of the free enterprise system, the public policy ideas that enable free enterprise to thrive, and the positive contributions of the business community to the prosperity and welfare of the people of Oklahoma. As a non-profit, non-partisan research and education organization, SCRF is dedicated to advancing free markets, increasing opportunity, and growing prosperity.

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