OKLAHOMA BUSINESS LEADERS POLL FALL 2026

FALL EDITION · SURVEY RESULTS WITH SPRING 2026 COMPARISONS

THE STATE CHAMBER
www.okstatechamber.com

OKLAHOMA BUSINESS ROUNDTABLE
BUSINESS LEADERSHIP ADVANCING OKLAHOMA'S ECONOMY
www.okbusinessroundtable.com

STATE CHAMBER RESEARCH FOUNDATION
www.okstatechamber.com/foundation

ABOUT THE BUSINESS LEADERS POLL

The Business Leaders Poll (BLP) is the “pulse check” of the Oklahoma business community. A collaborative project of The State Chamber, the Oklahoma Business Roundtable, and The State Chamber Research Foundation, the BLP measures the sentiments, concerns, and outlook of business leaders—from the C-suites to the corner stores—who shape Oklahoma’s economy.

This is the **Fall 2026 edition**, the second BLP of 2026. The fall survey reached **401 Oklahoma business owners and executives** in September 2026. The survey was fielded online by AlphaROC on the Occam platform. At this sample size, results carry a margin of error of approximately ±4.9 percentage points at the 95% confidence level.

The Spring 2026 edition surveyed 401 business leaders between March 17 and April 4, 2026. About half of this fall’s questions repeat from the spring so we can see how views have moved over six months; the rest are new and go deeper on workforce resources, health, infrastructure, capital, and tax trade-offs. Throughout this report, each question is labeled so readers can tell which is which. Because the two waves drew different mixes of respondents (for example, fewer health-sector leaders this fall), small spring-to-fall differences should be read with care.

The BLP is meant to be a resource for businesses, policymakers, and the public. It was conceived with the conviction that it is impossible to create the conditions for a prosperous and growing Oklahoma without first understanding the views of those who are on the front lines of Oklahoma’s economy.

We're pleased to share the **Fall 2026 edition** of the Oklahoma Business Leaders Poll (BLP), a collaborative initiative of The State Chamber, the Oklahoma Business Roundtable, and The State Chamber Research Foundation. The BLP captures the outlook, priorities, and concerns of business leaders across Oklahoma and serves as a vital tool for shaping sound economic and public policy.

Because this is the fall edition, it builds on the Spring 2026 BLP rather than starting over. **Some questions are the same as in the spring**, including the state's economic direction, top issues for business growth, workforce challenges, education pipeline, infrastructure, capital, and taxes, so we can see how business leaders' views have changed over six months. **Other questions are new this fall**, going deeper on where businesses turn for workforce help, healthcare and health outcomes, infrastructure quality, access to capital, and the trade-offs between cutting taxes and funding state priorities. Each question in this report is labeled so you can tell at a glance whether it is new or a repeat.

Key Insights from the Fall 2026 BLP:

- **59% say Oklahoma's economy is on the right track** compared to the national economy, down from 64% in the spring and 70% in 2025.
- **Workforce remains the top issue:** 68% name education and workforce as one of the two most important issues facing business growth, and skilled, credentialed workers are the hardest to hire (46%).
- **75% would likely use a single organization** that connects businesses with workforce resources, training providers, and qualified workers.
- **89% say better health outcomes would strengthen workforce productivity**, and 61% name affordability as the biggest healthcare issue in their community.
- **Views on incentives shifted:** 50% now favor limited, targeted incentives, up from 32% in the spring.

The BLP remains a valuable resource for guiding decision-making, aligning policy with business needs, and advancing Oklahoma's economic future. We thank the business community for its continued engagement and commitment to making Oklahoma a stronger, more competitive state.

With a strong business community leading the way and public policy grounded in robust data, Oklahoma's economic future is bright.

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

READING THE FALL EDITION

OKLAHOMA COMPETES: THE FUNDAMENTALS

ECONOMIC CLIMATE
Preserve and promote low-cost, pro-business advantages
Economic outlook, taxes, regulations, incentives, and fiscal trade-offs

WORKFORCE & EDUCATION
Improve skills and student outcomes
Workforce needs, the talent pipeline, and health outcomes

INFRASTRUCTURE
Build the physical foundation needed for growth
Infrastructure quality and how Oklahoma compares

INNOVATION & ENTREPRENEURSHIP
Attract and expand high-quality jobs
The innovation economy, capital, and starting a business

The Fall 2026 BLP is a companion to the Spring 2026 edition. Questions that repeat from the spring show how business leaders' views moved over six months. New questions add depth on topics the spring results raised. Where a question has been asked for three or more years, we show it as a trend line with a dashed line marking the overall direction.

REPEATED FROM SPRING 2026

- Is Oklahoma's economy on the right track?
- Two most important issues facing business growth
- How well the workforce meets business needs
- Workforce challenges that limit growth
- High school graduates' workplace readiness
- How well universities, CareerTech, community colleges and apprenticeships prepare students
- Infrastructure compared to competitor states
- Oklahoma's innovation economy
- Access to capital for starting or scaling a business
- Whether businesses pay too much in taxes
- Which taxes most need reform
- Views on incentives
- What state leaders can do this year to help businesses grow

SHOWN AS MULTI-YEAR TRENDS

- Right track (2022–Fall 2026)
- Education pipeline ratings (2024–Fall 2026)
- Tax burden on business (2023–Fall 2026)

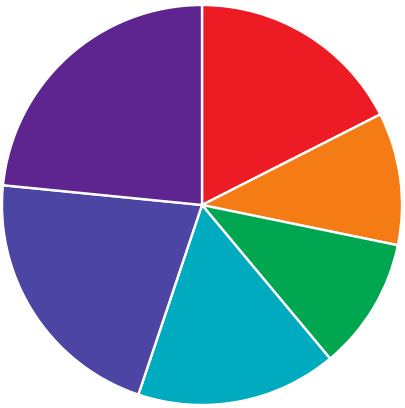
NEW THIS FALL

- Factors that most constrain productivity
- Where businesses turn for workforce help
- Interest in a single workforce point of contact
- Most valuable workforce services
- Hardest category of worker to fill *(last asked in 2025)*
- Biggest healthcare issue in your community
- Impact of better health outcomes on productivity *(similar question in 2025)*
- What Oklahoma should do to improve health outcomes *(similar list in 2025)*
- Overall infrastructure quality
- Relocating, or considering it, because of capital access
- Biggest barrier to entrepreneurship
- Business performance compared to a year ago
- Which tax should increase if income tax keeps falling
- Costs incentives should address
- Cut income taxes or spend on mental health programs
- Cut income taxes or spend on safety net programs

Look for these labels throughout the report: REPEATED FROM SPRING 2026 NEW THIS FALL RETURNING FROM 2025 MULTI-YEAR TREND

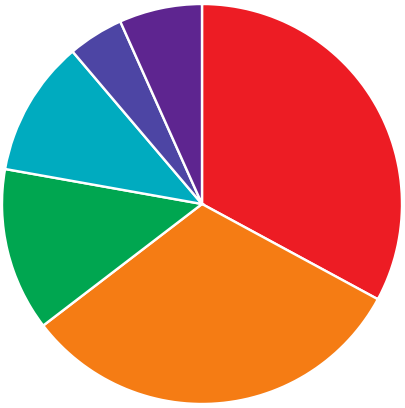
About the data: The Fall 2026 BLP was fielded by AlphaROC using the Occam survey platform. 401 Oklahoma business leaders responded online in September 2026 (margin of error approximately ±4.9 percentage points at the 95% confidence level). Spring 2026 comparisons come from the same AlphaROC/Occam survey fielded March 17–April 4, 2026.

WHO TAKES THE SURVEY?



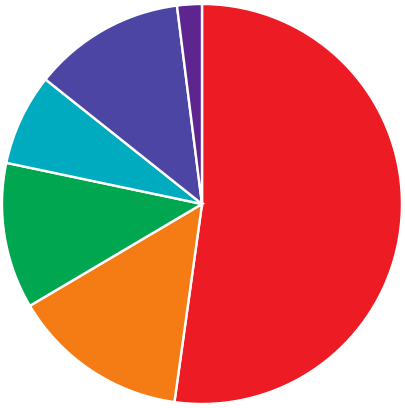
AREA OF CUSTOMER BASE

18%	OKC
11%	Tulsa
11%	Rural
16%	Statewide
21%	Multiple States
23%	National / International



LENGTH IN OKLAHOMA

33%	Over 50 Years
32%	20-50 Years
13%	10-19 Years
11%	6-9 Years
4%	3-5 Years
7%	Less Than 3 Years



NUMBER OF EMPLOYEES

52%	Under 100
14%	100-250
12%	251-500
7%	501-1,000
12%	1,001-10,000
2%	Over 10,000

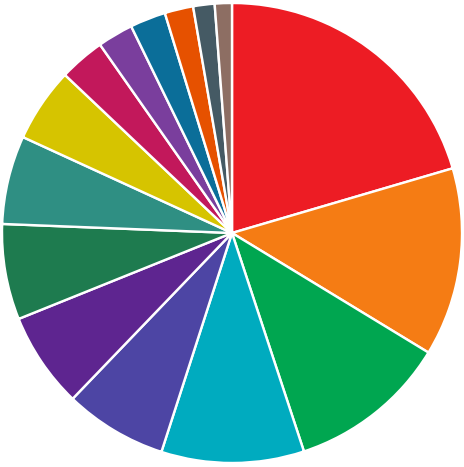
Fall 2026 respondents (n=401). Percentages may not sum to 100% due to rounding.

WHO TAKES THE SURVEY?



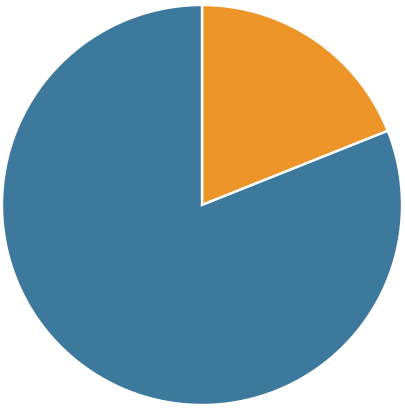
HEADQUARTERS LOCATION

40%	OKC Metro
22%	Tulsa Metro
20%	Rural Oklahoma
18%	Out of State



INDUSTRY

20%	Professional Services
13%	Health
11%	Finance / Banking
10%	Manufacturing
7%	Retail
7%	Construction / Repairs
7%	Information / Technology
6%	Education
5%	Hospitality / Food Service
3%	Transportation
2%	Mining / Extraction
2%	Agriculture
2%	Other / Unknown
2%	Wholesale Trade
1%	Utilities



STATE CHAMBER MEMBERSHIP

19%	Member
81%	Not a member

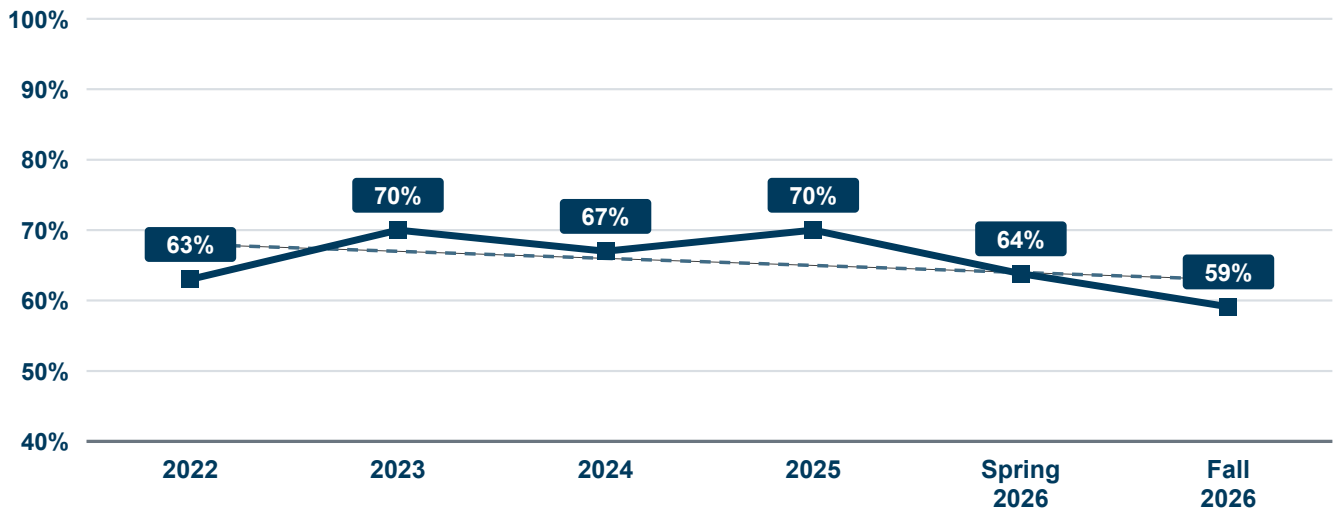
Fall 2026 respondents (n=401). Membership shares are based on respondent counts in the fall data file.

ECONOMIC CLIMATE:
PRESERVE AND PROMOTE LOW-COST, PRO-BUSINESS ADVANTAGES

Business leaders still lean positive about Oklahoma's direction, but confidence has cooled. This fall, **59%** say Oklahoma's economy is headed in the right direction compared to the national economy, down from 64% in the spring and the lowest reading since the poll began tracking the question in 2022. Leaders of the largest employers (1,001–10,000 employees) are the most cautious, with only 46% saying right direction.

Compared to the national economy, is Oklahoma's economy headed in the right direction or on the wrong track? (% right direction)

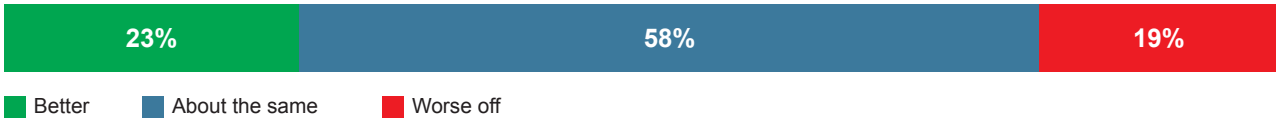
MULTI-YEAR TREND



Dashed line shows the overall direction across all six readings. 2022–2025 from prior BLP editions.

Compared to a year ago, how would you rate your business' performance?

NEW THIS FALL



KEY TAKEAWAYS:

- Optimism about Oklahoma's economy has slipped for the second straight wave: 59% right direction this fall vs. 64% in the spring and 70% in 2025. The trend line points downward.
- Most businesses are holding steady: 58% say performance is about the same as a year ago, with slightly more doing better (23%) than worse (19%).
- Mid-sized businesses (100–250 employees) are the most likely to report improvement (39% better).

What do you think are the two most important issues facing Oklahoma business growth? (select two)

REPEATED FROM SPRING 2026

	Spring 2026	Fall 2026	Change
Education and Workforce	74%	68%	−6
Government Leadership	38%	44%	+6
Infrastructure	37%	31%	−6
Economic Climate	28%	34%	+6
Innovation and Entrepreneurship	23%	23%	0

What actions can state leaders take this year that would help your business grow? (open-ended, grouped by theme)

REPEATED FROM SPRING 2026

	Spring 2026	Fall 2026	Change
Tax Policy & Reform	32%	29%	−3
Education & Workforce Development	47%	27%	−20
Business Incentives & Grants	16%	20%	+4
Regulatory Environment	4%	15%	+11
Healthcare & Social Services Reform	9%	13%	+4
Infrastructure & Public Services	20%	13%	−7
Government Accountability / Leadership	4%	12%	+8
No Actionable Insight	0%	8%	+8
Other	5%	6%	+1

“State leaders can help businesses grow this year by listening directly to employers and removing the barriers that keep them from taking the next step.”

– Survey participant, Fall 2026

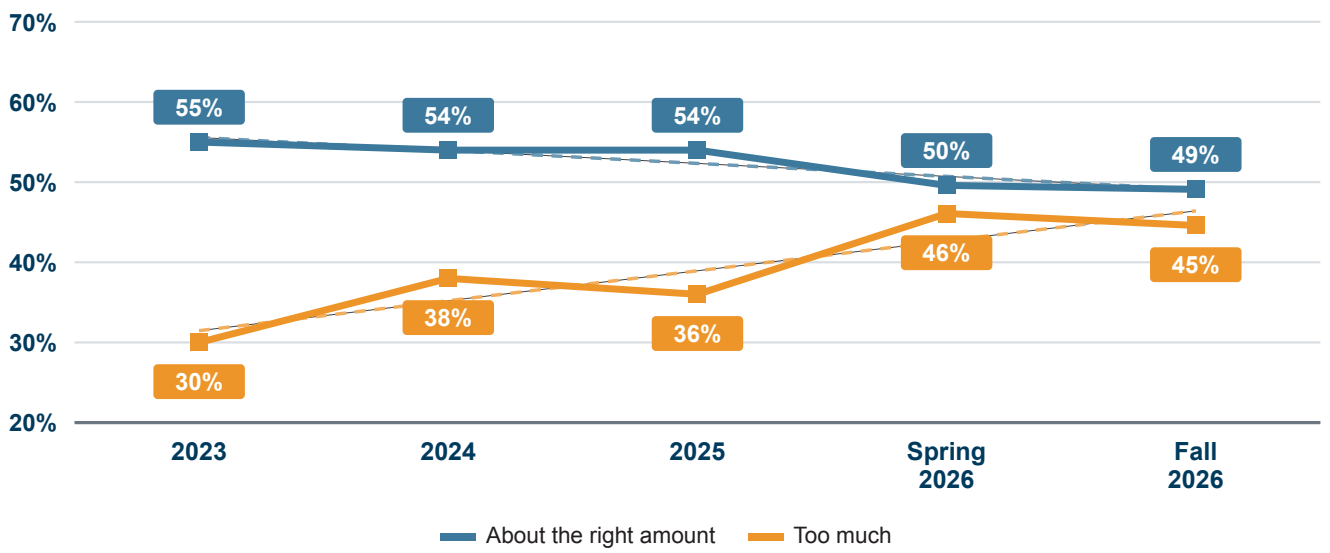
KEY TAKEAWAYS:

- Education and workforce is still the top issue for business growth (68%), though it eased from 74% in the spring as government leadership (44%) and the economic climate (34%) gained ground.
- Tax policy and reform (29%) and education and workforce development (27%) lead what business leaders want from state leaders this year. Calls for regulatory relief rose from 4% to 15%.

Roughly half of business leaders still say their business pays about the right amount in taxes, but the share saying they pay too much has climbed since 2023. Small businesses feel it most: 55% of businesses with under 100 employees say they pay too much, compared to about a third of larger businesses.

Does your business pay too much, too little, or about the right amount in taxes?

MULTI-YEAR TREND



2023–2025 included an "undecided" option; 2026 did not, which accounts for part of the increase. Fall 2026: 6% say somewhat too little. Dashed lines show the overall direction.

To make Oklahoma more competitive, which taxes most need reform?

REPEATED FROM SPRING 2026

	2023	2024	2025	Spring 2026	Fall 2026
Individual income tax	34%	40%	33%	34%	36%
Taxes on businesses	25%	23%	22%	27%	26%
Property taxes	13%	21%	17%	27%	26%
Sales tax	20%	13%	21%	12%	12%
Undecided	8%	3%	7%	–	–

Individual income tax has led every year, so a table is enough here; no trend line needed. Property tax is the one item that has moved, roughly doubling since 2023.

KEY TAKEAWAYS:

- 45% of business leaders say their business pays too much in taxes, close to the spring's record high of 46%. Individual income tax remains the top target for reform (36%).
- Regulation is a growing concern. When asked what state leaders can do this year, calls for regulatory relief rose from 4% in the spring to 15% this fall, and 19% name regulatory complexity as a constraint on productivity.

If individual income tax continues to decrease, what tax should increase to backfill the lost revenue and maintain the current level of government services?

NEW THIS FALL



Which statement best reflects your view on incentives?

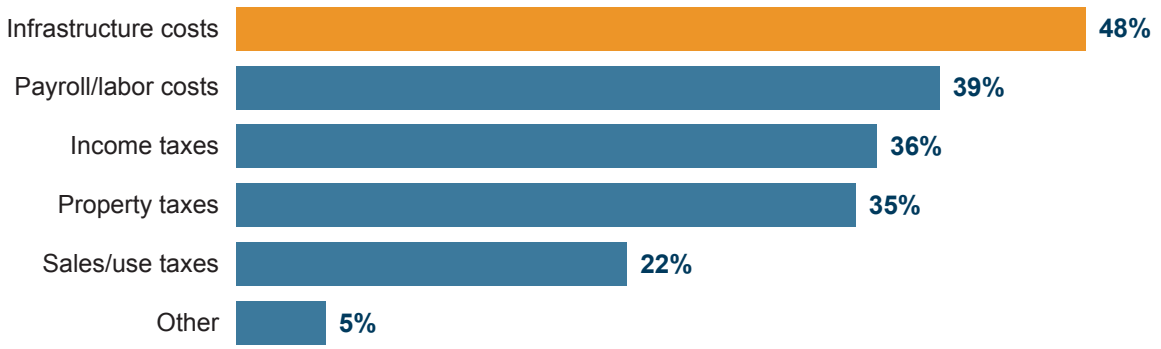
REPEATED FROM SPRING 2026

	2025	Spring 2026	Fall 2026
Avoid tax incentives / no incentives, the free market should decide	20%	7%	10%
Use limited, targeted incentives	13%	32%	50%
Oklahoma needs incentives to compete with other states	62%	61%	39%
Undecided	5%	–	–

2025 wording was longer and included an "undecided" option; Spring and Fall 2026 used the same wording.

Which types of costs are most important for Oklahoma to address through economic development incentives? (select up to 2)

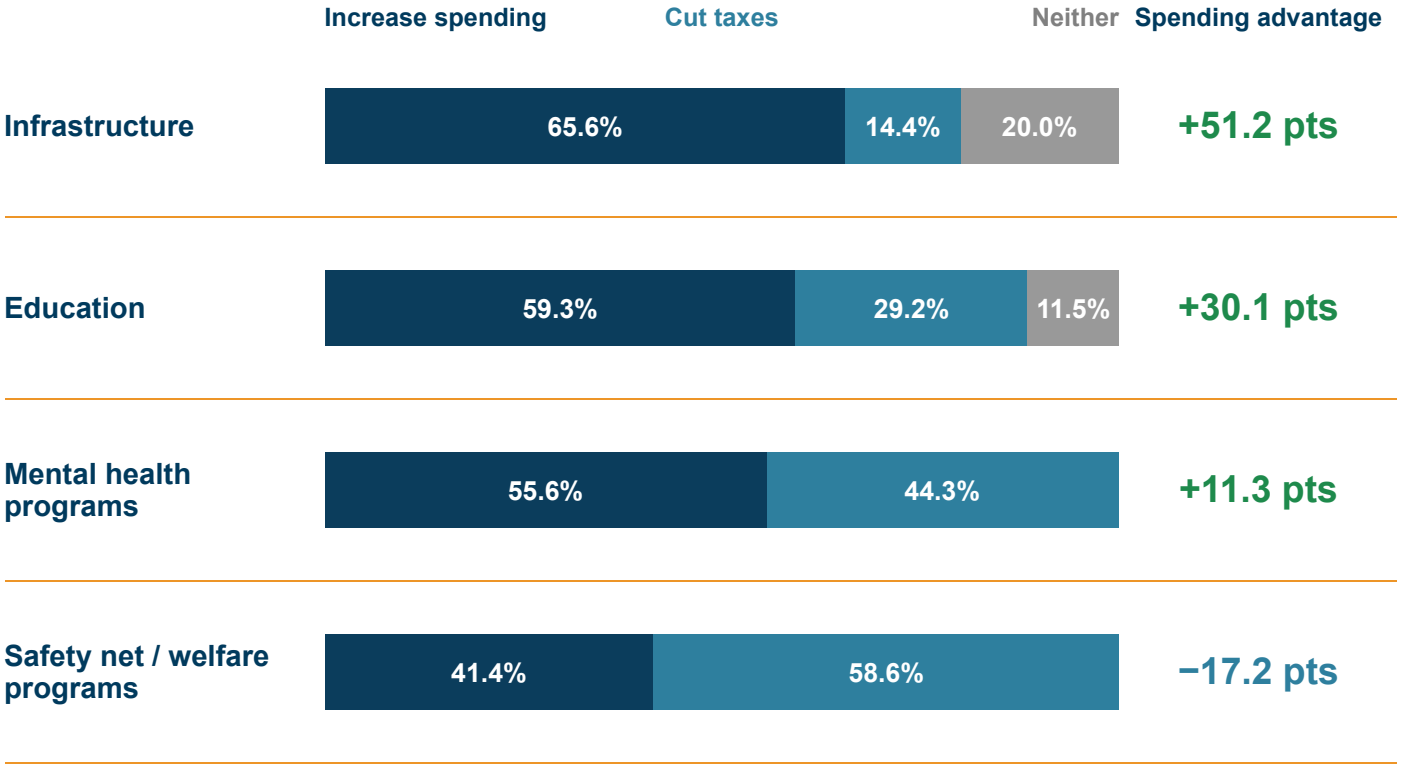
NEW THIS FALL



KEY TAKEAWAYS:

- Business leaders' view of incentives shifted noticeably over six months. Half (50%) now favor limited, targeted incentives, up from 32% in the spring, while the share saying Oklahoma needs incentives to compete fell from 61% to 39%.
- If income taxes keep falling, business leaders would most like to make up the revenue with corporate income taxes (49%), ahead of sales taxes (37%) and property taxes (14%).
- Infrastructure costs (48%) are the top cost business leaders want incentives to address.

Leaders prioritize key investments over tax cuts



Tax cuts lead only for safety net / welfare programs

Q: Would you rather cut taxes or increase spending on…? Combines “definitely” + “maybe/probably” responses. Percentages may not total 100% due to rounding.

Source: Oklahoma Business Leaders Poll, N=401 each wave. Infrastructure and education: Spring 2026. Mental health and safety net: Fall 2026

NEW THIS FALL

KEY TAKEAWAYS:

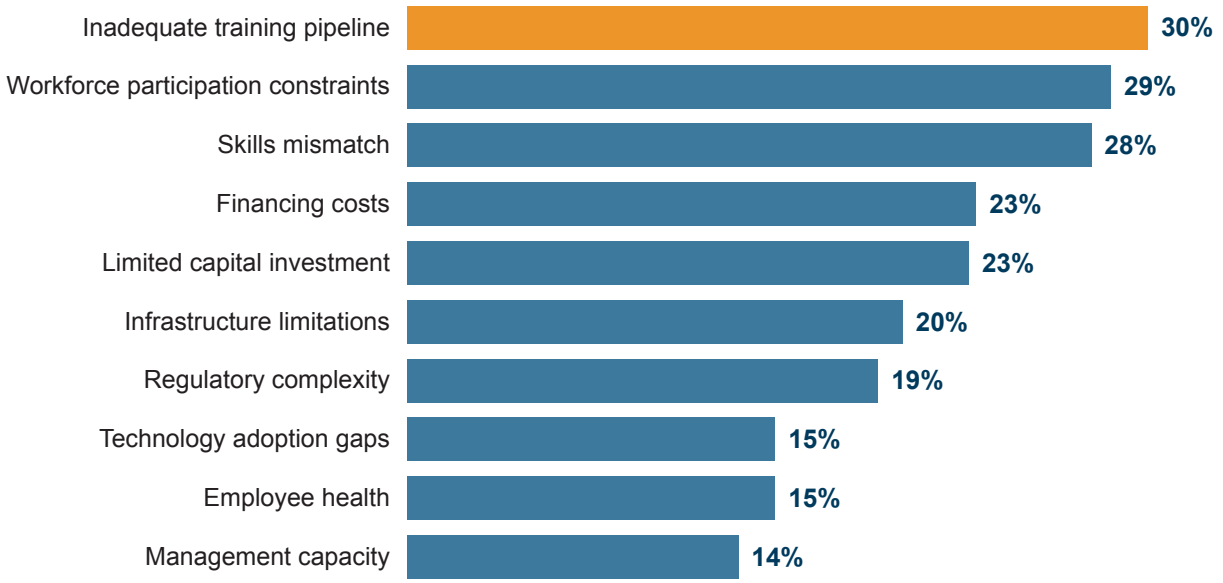
- Business leaders favor investing in infrastructure (+51 points) and education (+30 points) over cutting taxes, based on the spring results.
- This fall, leaders narrowly favor spending on mental health programs over cutting personal income taxes (56% to 44%), nearly identical to 2025 (55% to 40%).
- Safety net and welfare programs are the only area where tax cuts win (59%), though support for that spending is up from 27% in 2025 to 41%.

WORKFORCE & EDUCATION:
IMPROVE SKILLS AND STUDENT OUTCOMES

Workforce and education remain the defining constraint on growth. Business leaders point first to the training pipeline (30%), people not participating in the workforce (29%), and skills that don't match the job (28%) as the factors that hold back productivity.

Which factors most constrain your ability for productivity in Oklahoma?

NEW THIS FALL



How well does Oklahoma's workforce meet your business's workforce needs?

REPEATED FROM SPRING 2026

	Spring 2026	Fall 2026	Change
Well / Very well	30%	24%	−6
Moderately	52%	58%	+6
Poorly / Very poorly	18%	18%	0

What category of worker is most difficult for you to fill?

RETURNING FROM 2025

	2025	Fall 2026
Entry level	20%	18%
Skilled, including credentials but not necessarily a 4-year degree	54%	46%
College degree	9%	21%
Executive / management	11%	15%
Undecided	5%	–

2025 offered an "undecided" option; Fall 2026 did not.

Which workforce challenges most limit your growth? (select up to 3)

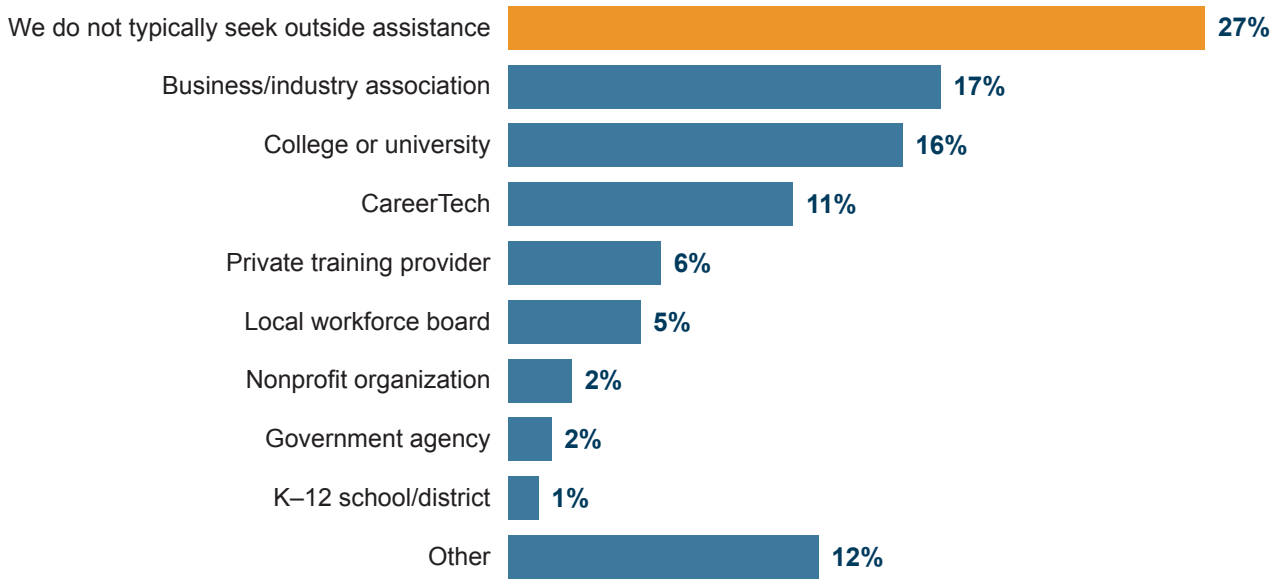
REPEATED FROM SPRING 2026

	Spring 2026	Fall 2026	Change
Recruitment pipeline (not enough candidates)	54%	44%	−10
Technical skills gap	43%	50%	+7
Retention / turnover	44%	44%	0
Durable / soft skills gap	33%	42%	+9
Degree attainment	11%	10%	−1
Entry-level availability*	16%	–	–
Executive / management availability*	12%	–	–

**Not reported in the fall results. The fall survey asked about the hardest category of worker to fill as a separate question (previous page).*

When your business has difficulty meeting its workforce needs, where do you typically turn for assistance?

NEW THIS FALL

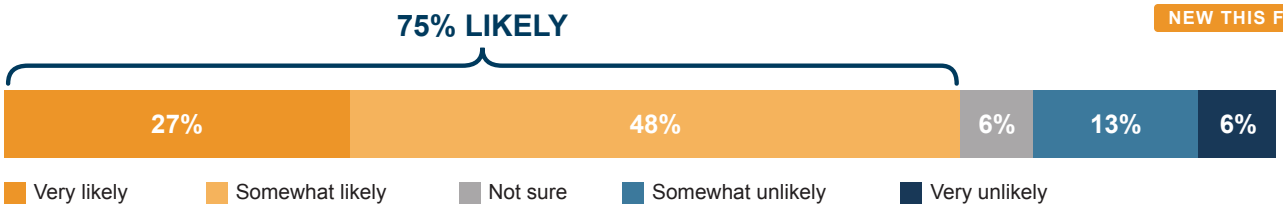


"Access to a skilled workforce remains one of the most important factors influencing business growth."

– Survey participant, Fall 2026

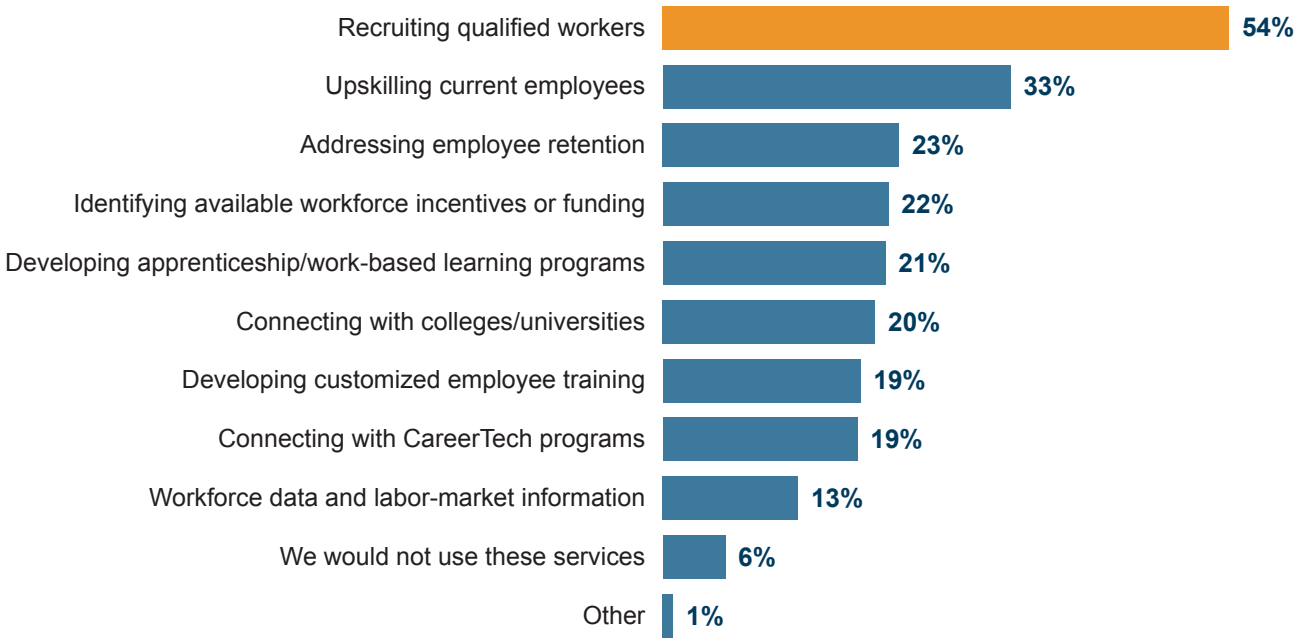
If there were a single organization that helped businesses connect with workforce resources, training providers, and qualified workers, how likely would your business be to use it?

NEW THIS FALL



Which workforce services would be most valuable to your business from a single point of contact? (select up to 3)

NEW THIS FALL



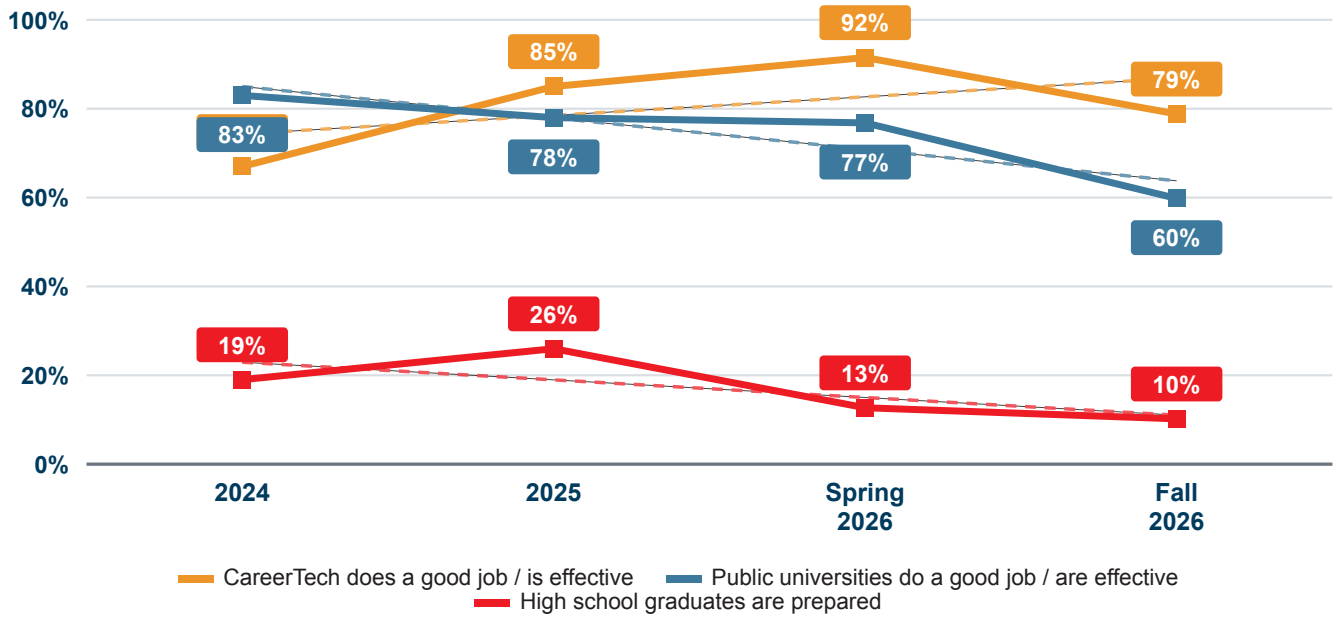
KEY TAKEAWAYS:

- Workforce challenges have shifted from **finding enough candidates** toward **finding candidates with the right skills**: the technical skills gap rose from 43% to 50% and the durable/soft skills gap from 33% to 42%, while recruitment pipeline concerns fell from 54% to 44%.
- Skilled, credentialed workers remain the hardest to hire (46%), but more businesses now struggle to fill college-degree roles (21%, up from 9% in 2025).
- More than a quarter of businesses (27%) don't seek outside help when they can't meet workforce needs, yet 75% would likely use a single organization that connects them to workforce resources. Recruiting qualified workers (54%) is the service they want most.

Business leaders continue to rate CareerTech and apprenticeships as the strongest parts of Oklahoma's talent pipeline, and remain deeply skeptical that high school graduates are ready for work. This fall, every part of the pipeline was rated less favorably than in the spring.

How well do Oklahoma's schools and training systems prepare students for work?

MULTI-YEAR TREND



2024–2025 asked whether each system "does a good job" (agree/disagree); 2026 asks how effectively each prepares students (somewhat + very effective shown) and how prepared high school graduates are (prepared + very prepared shown). Dashed lines show the overall direction.

Percent rating each as effective at preparing students for work

REPEATED FROM SPRING 2026

	Spring 2026	Fall 2026	Change
Public universities	77%	60%	−17
CareerTech system	92%	79%	−13
Community colleges	77%	59%	−18
Apprenticeships / work-based learning	98%	83%	−15
High school graduates prepared	13%	10%	−3

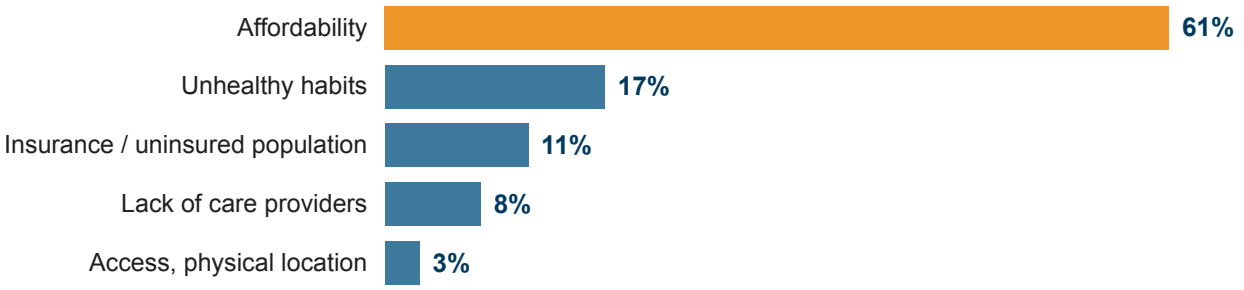
KEY TAKEAWAYS:

- Only 10% of business leaders say high school graduates are prepared for the workplace, the lowest level in the four readings since 2024.
- Apprenticeships and work-based learning (83%) and CareerTech (79%) remain the most trusted pipelines, even after declines from the spring.
- Ratings of public universities have fallen each year, from 83% in 2024 to 60% this fall; community colleges dropped from 77% to 59% since the spring.

Oklahoma's health outcomes affect both the size of the available workforce and the cost of employing it. Business leaders see the connection: **89%** say improving health outcomes would have a major or moderate impact on workforce productivity, up from 84% who saw a major or modest improvement in 2025.

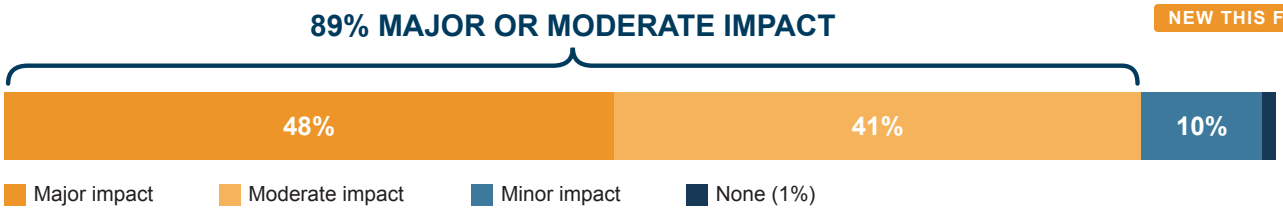
What is the biggest issue regarding healthcare in your community?

NEW THIS FALL



How much would improving Oklahoma's health outcomes strengthen workforce productivity?

NEW THIS FALL



What do you think Oklahoma should do to improve health outcomes? (select all that apply)

RETURNING FROM 2025

	Fall 2026	2025
Improve access to mental health programs and addiction recovery to increase workforce and reduce workplace reductions	59%	44%
Incentivize employer sponsored wellness initiatives to reduce chronic disease and absenteeism	56%	29%
Further disincentivize vaping and tobacco use for youth	38%	19%
Increase residency slots at Oklahoma med schools to address physician shortages	36%	22%
Address rural health care needs by increasing telemedicine	36%	40%
Expand scope of practice of health professionals	28%	37%
Regulate the use of pharmacy benefits managers	22%	–

2025 asked respondents to choose what was most important and allowed fewer selections, so compare the order of priorities rather than the levels. Pharmacy benefit manager regulation was added this fall.

KEY TAKEAWAYS:

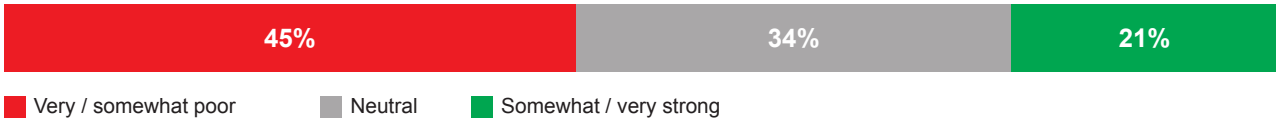
- Affordability is by far the biggest healthcare issue in Oklahoma communities (61%).
- Mental health and addiction recovery remains the top priority (59%). Employer wellness initiatives jumped from fourth place in 2025 to a close second (56%).

INFRASTRUCTURE:
BUILD THE PHYSICAL FOUNDATION NEEDED FOR GROWTH

Infrastructure is where business leaders see Oklahoma falling furthest behind its competitors, and that view has held steady for more than a year. Rural-based businesses are the most critical: 54% rate the state's overall infrastructure as poor, compared to 38% of Oklahoma City-based businesses.

How would you rate Oklahoma's overall infrastructure quality?

NEW THIS FALL



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

REPEATED FROM SPRING 2026

	2025	Spring 2026	Fall 2026
Worse / Much worse	57%	59%	59%
About the same	35%	33%	34%
Better / Much better	6%	8%	7%

2025 asked whether the quality of physical infrastructure was much higher, comparable, or much lower in Oklahoma than in competing states. Results have been flat across all three readings, so no trend line is needed.

> **"Look at the infrastructure development in the state and complete it in a timely manner."**
>
> – Survey participant, Fall 2026

KEY TAKEAWAYS:

- Nearly six in ten business leaders (59%) say Oklahoma's infrastructure is worse than competitor states, unchanged from the spring.
- Only 21% rate Oklahoma's overall infrastructure as strong.
- Infrastructure costs are the top cost business leaders want economic development incentives to address (48%), and in the spring 66% preferred more infrastructure spending over cutting taxes.

INNOVATION & ENTREPRENEURSHIP:
ATTRACT AND EXPAND HIGH-QUALITY JOBS

How would you rate Oklahoma's innovation economy, which includes advanced industry, technology adoption, and research and development?

REPEATED FROM SPRING 2026

	Spring 2026	Fall 2026	Change
Weak / Very weak	33%	40%	+7
Neutral / Moderate	48%	33%	−15
Strong / Very strong	19%	27%	+8

Spring 2026 used a "moderate" midpoint; Fall 2026 used "neutral."

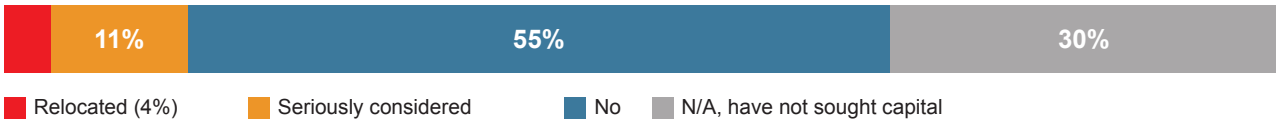
How accessible is capital for starting or scaling a business in Oklahoma?

REPEATED FROM SPRING 2026

	Spring 2026	Fall 2026	Change
Accessible / Very accessible	27%	23%	−4
Neutral	49%	53%	+4
Inaccessible / Very inaccessible	24%	24%	0

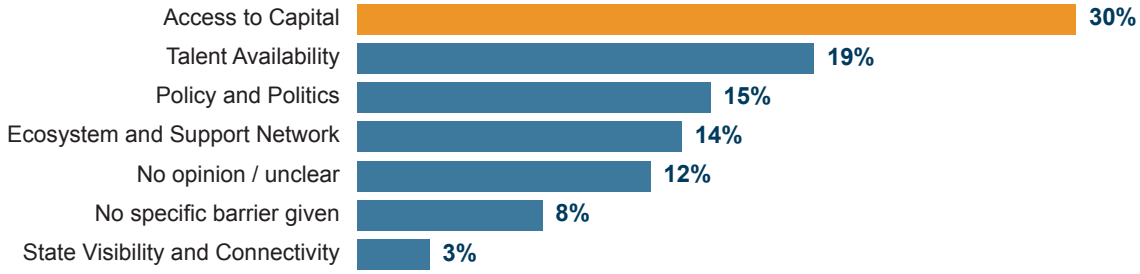
Has your business ever relocated, or seriously considered relocating, outside Oklahoma because of difficulty accessing capital?

NEW THIS FALL



What is the biggest barrier to entrepreneurship in Oklahoma? (open-ended, grouped by theme)

NEW THIS FALL



KEY TAKEAWAYS:

- More leaders now call the innovation economy weak (40%, up from 33% in the spring), though more also call it strong (27%).
- About one in seven businesses (14%) has relocated or seriously considered relocating out of Oklahoma because of difficulty accessing capital.
- Small businesses feel the capital squeeze most: 32% of businesses with under 100 employees say capital is inaccessible, compared to 8% of those with 1,001–10,000 employees.
- Access to capital (30%) and talent availability (19%) top the list of barriers to entrepreneurship.



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.

www.statechamberresearch.org

OKLAHOMA BUSINESS LEADERS POLL FALL 2026

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BUSINESS LEADERSHIP ADVANCING OKLAHOMA'S ECONOMY
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