



2017-2018 PROFILE

CHOCTAW NATION

ECONOMIC DEVELOPMENT PARTNERSHIP

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ECONOMIC DEVELOPMENT PARTNERSHIP



The Great Seal of the Choctaw Nation formalized in 1857. The pipe within the seal is traditionally understood as a representation for community alliances. Rising tobacco smoke from the pipe can symbolize prayer connections and the unstrung bow is a symbol of the Choctaw people's love of peace, but willingness to go to war if attacked. The three arrows honor Choctaw Chiefs Pushmataha, Mushulatubbe, and Apukshunabbe.

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*On the cover: Choctaw Hunting Lodge
Blanco, Atoka County, OK*

Choctaw Nation owns 44,000+ acres near Daisy, OK where traditional ranching and hunting operations are blended with cutting edge opportunities in research and development for Unmanned Aircraft Systems. Choctaw Hunting Lodge welcomes hundreds of sports enthusiasts seeking the opportunity to hunt trophy whitetail deer, wild hogs, and turkey.



Chief
Gary Batton



Assistant Chief
Jack Austin, Jr.

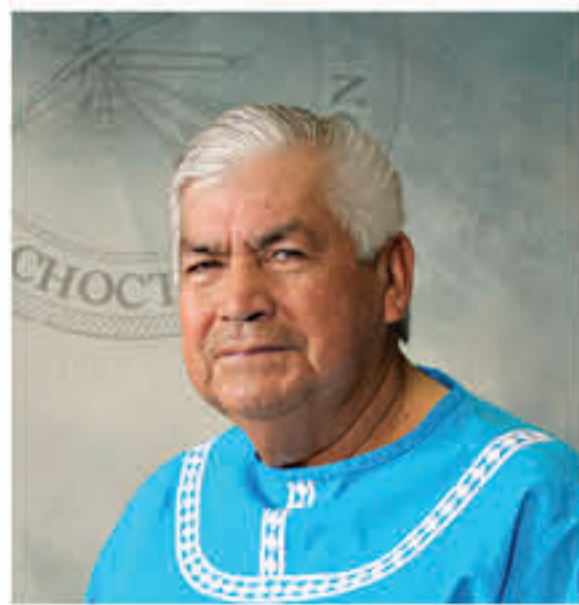
2017-2018 TRIBAL COUNCIL



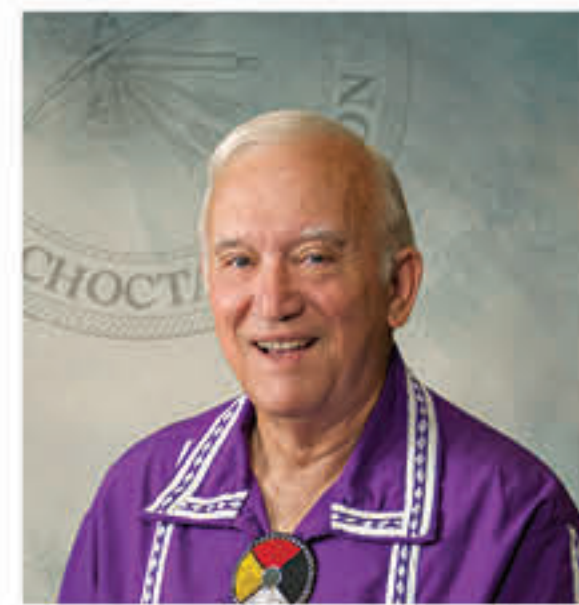
Thomas Williston
District 1



Tony Ward
District 2



Kenny Bryant
District 3



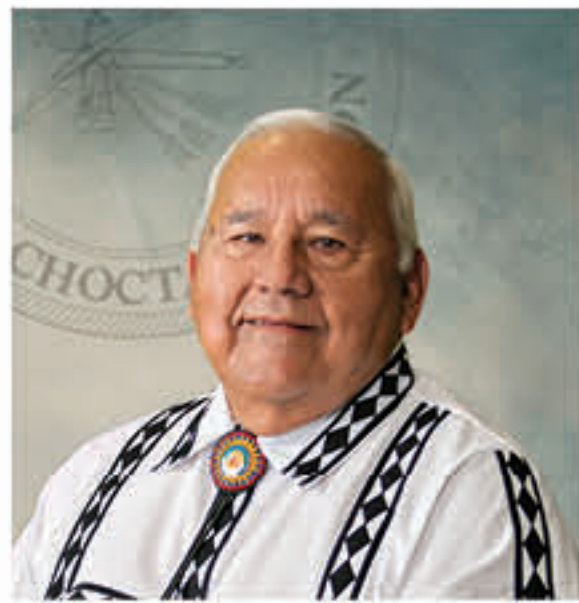
Delton Cox
District 4



Ronald Perry
District 5



Jennifer Woods
District 6



Jack Austin, Sr.
District 7



Perry Thompson
District 8



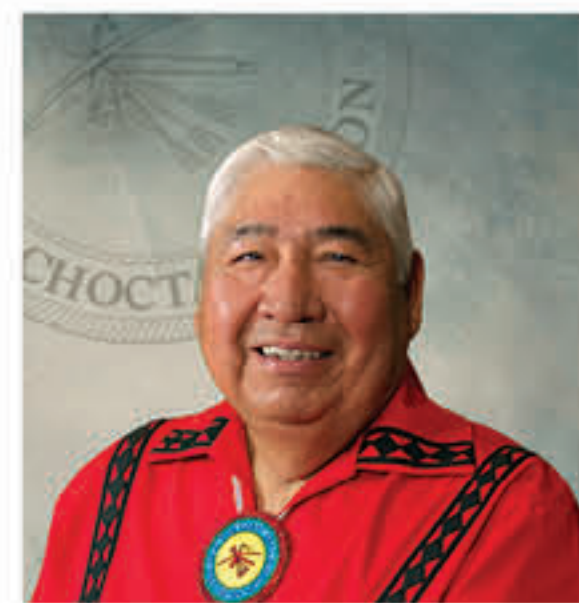
James Dry
District 9



Anthony Dillard
District 10



Bob Pate
District 11



James Frazier
District 12

LETTER FROM CHIEF **HALITO!**

Choctaw Nation of Oklahoma takes considerable pride in helping our communities achieve sustainable long-term growth.

The Choctaw Nation is passionate about creating jobs, improving outcomes, and building workforce development initiatives, along with enhancing the economic vitality and sustainability of our communities and helping a diverse array of businesses thrive.

This past year, the tribe has worked closely with local leaders and investors to attract industry and retail, increase tourism, assist existing businesses with expansion, and provide tribal business support for Chahtapreneurs through our Choctaw Small Business Development program.

We are Choctaw proud and the 1.9 billion dollar impact we make on the State of Oklahoma poises us to continue serving as an enduring tribe that partners with our neighbors, businesses, and communities to bring positive change for the future. I invite you to join in my enthusiasm as we continue to look ahead for sustainable economic growth and prosperity.

We are committed to building rural America and take great pride in our past, incessantly work to improve our present, and look ahead for opportunities that connect people in meaningful ways.

Yakoke,

Chief Gary Batton
Choctaw Nation of Oklahoma

Our quality of life begins with livability and we recognize the need for continual advancement, particularly in the areas of transportation, education, healthcare, housing, tourism, and business and economic development.



Vision:

Living out the Chahta Spirit of Faith, Family and Culture

The Choctaw Nation of Oklahoma is a federally recognized tribe whose service area spans across 10 ½ counties (11,000 square miles) in rural southeastern Oklahoma. The Nation is comprised of over 200,000 members spread across the United States and is the third largest tribe in the country.

Choctaw Nation is led by the vision and leadership of Chief Gary Batton, Assistant Chief Jack Austin, Jr., and 12 elected Tribal Council Members. Choctaw Nation has three branches of government including Executive (Chief and Assistant Chief), Legislative (Tribal Council), and Judicial (Court of General Jurisdiction). With strong leadership, the tribe plays an important role in the regional and State growth of Oklahoma.

The culture and traditions of Choctaw Nation have been handed down through many generations. Values are displayed through the Chahta language, stickball, and traditional dancing, all of which are practiced throughout the Nation.

Education is a top priority and a significant amount of resources are allocated annually to fund day cares, workforce education, higher and adult education, career and vocational development, Choctaw Head Starts, and the School of Choctaw Language.

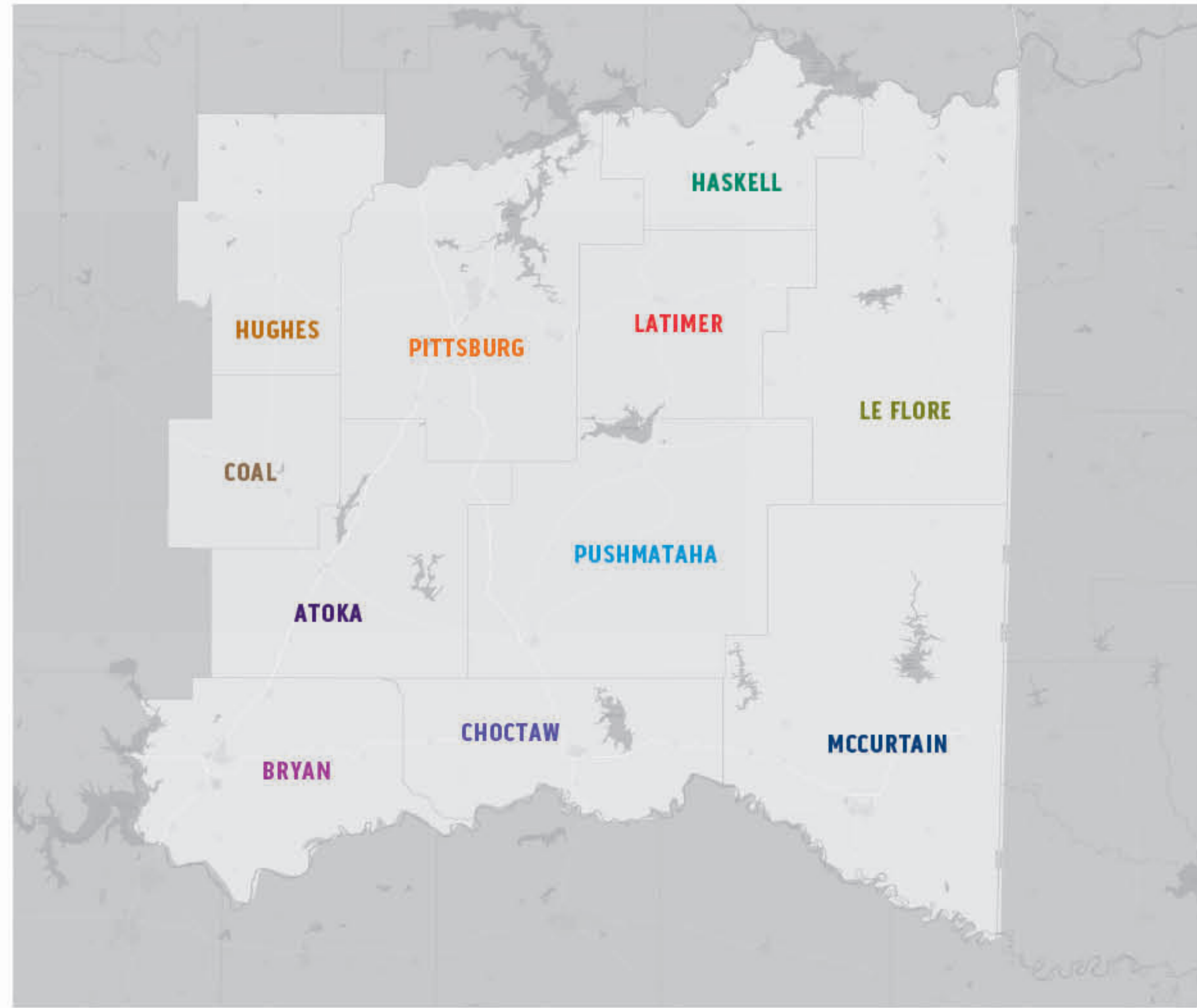
Healthy lifestyles are promoted by the Choctaw Nation through health service programs and clinics support. The “Going Lean” initiative encouraged healthier lifestyles for tribal members in order to combat obesity, heart disease, and diabetes. The tribe operates a treatment center for substance abuse, 16 health clinics, 13 wellness centers, and multiple food distribution centers throughout the 10 ½ counties.

In 2016, Choctaw Nation Division of Commerce was formed to generate revenue and accelerate the success of the tribe and its members. The commerce team provides a financial stream to support programs and services that directly assist the Chahta people including health care, education, housing, and senior care, but also enables the tribe to support a multitude of community programs and charities.

The Nation’s diverse portfolio of businesses include construction, commercial real estate and leasing, business and economic development, tourism, small business services, government contracting, defense services, agriculture, retail, gaming and resort sites, hospitality, grocery and convenience stores, restaurant franchises, wildlife management operations, eCommerce, and a multi-million dollar printing company.

Mission:

To the Choctaw proud, ours is the sovereign nation offering opportunities for growth and prosperity



Choctaw Nation of Oklahoma consists of 10 1/2 counties in southeastern Oklahoma. The area is rich with agriculture and natural resources including coal, natural gas, crude oil, timber, and crop production. There are over 88 million people within a 500-mile radius.

ABOUT THE TERRITORY

Investments within our tribal boundaries increase economic viability and sustainability and create long-term growth and job creation for the Choctaw Nation. Business and economic development expands on the Nation’s internal resourcefulness to address the need for outside relationships in order to build stronger policies

and remove barriers for future growth. Opportunities, projects, and services acquired through partnerships have a direct, positive impact on the lives of tribal members and are respectful of the economic, environmental, and cultural concerns of the Nation.

Choctaw Nation Territory Market Access Map



CHOCTAW NATION TERRITORY DEMOGRAPHICS

TOTAL TERRITORY POPULATION **255,000**

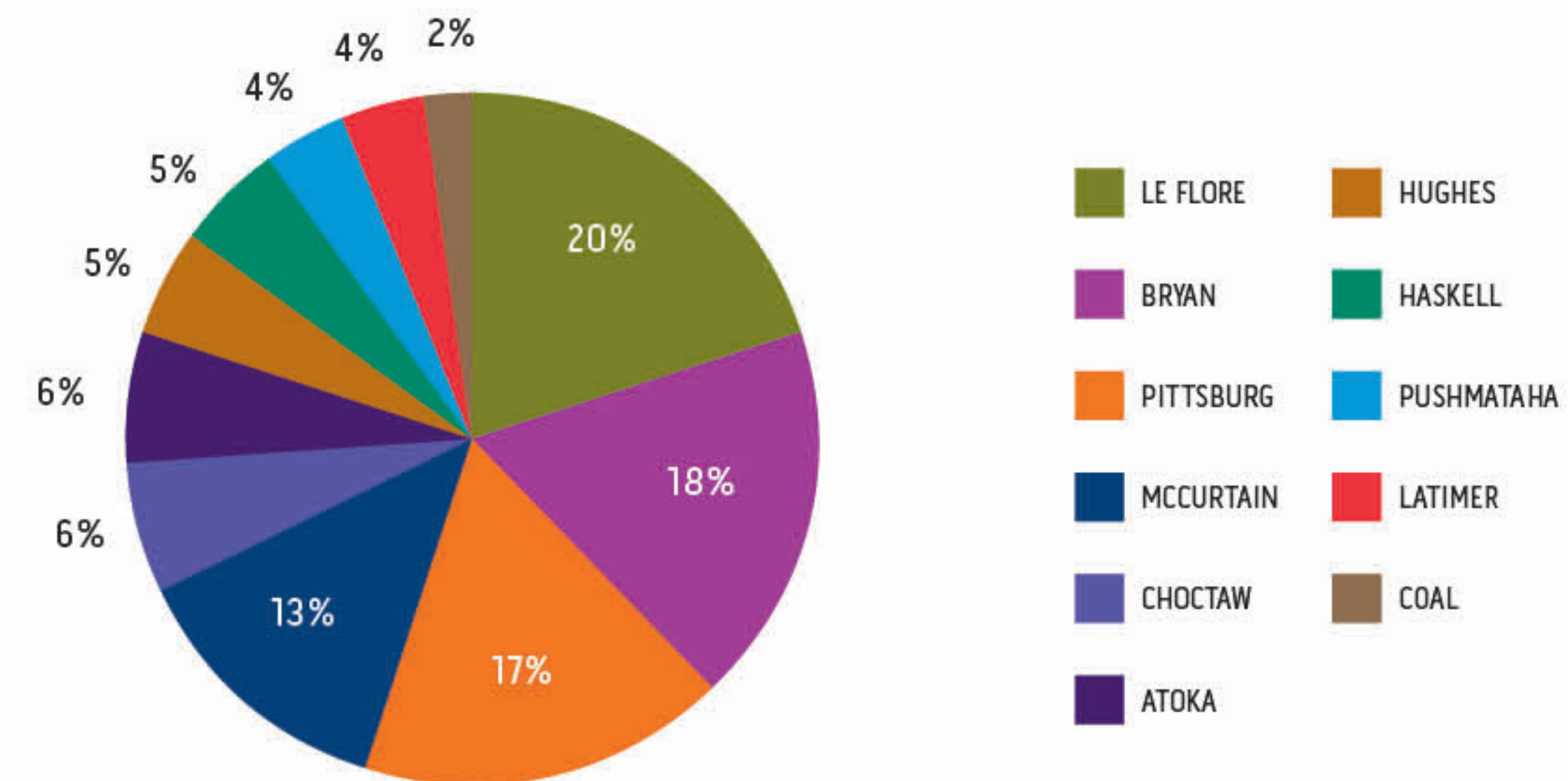


AVERAGE AGE **40** GENDER RATIO **1:1** MINORITY POPULATION **30%** BACHELOR'S DEGREE OR HIGHER **15.7%**

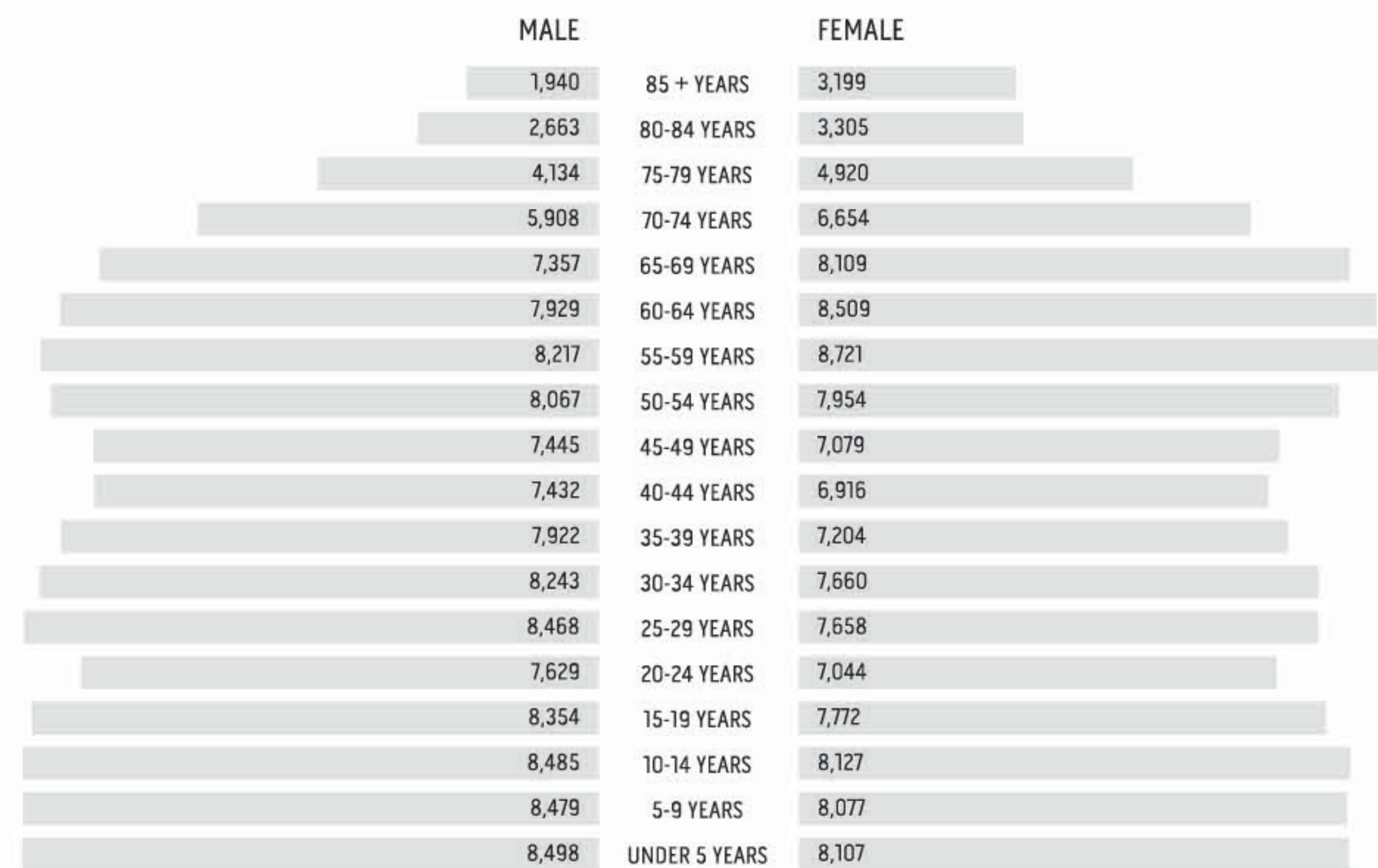
PER CAPITA INCOME **\$20,401** AVERAGE HOURLY EARNINGS **\$17** AVERAGE YEARLY EARNINGS **\$46,333**



BASED ON 255,000 TOTAL
POPULATION DISTRIBUTION



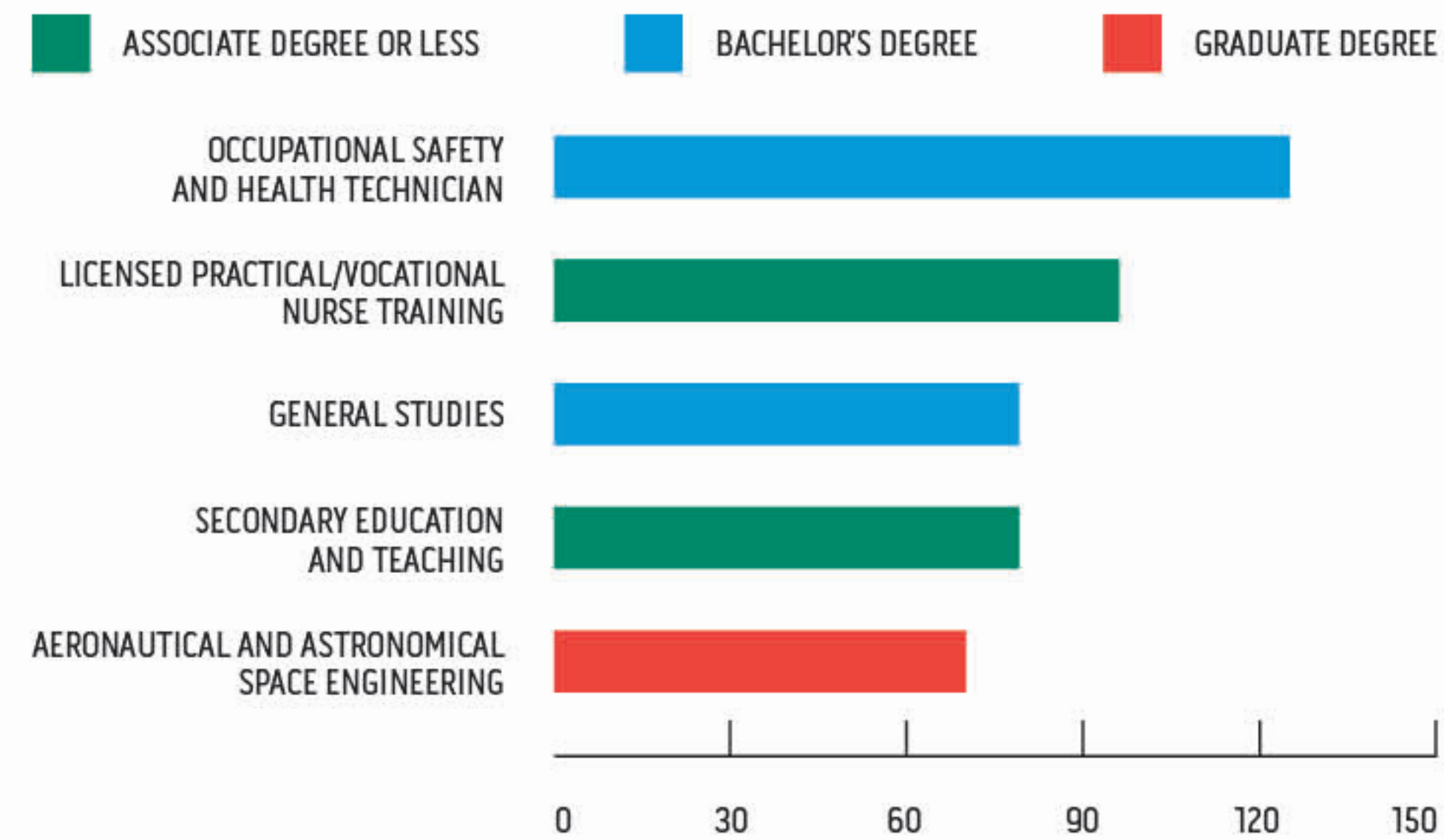
DEMOGRAPHICS
POPULATION BY AGE COHORTS



DEMOGRAPHICS EDUCATION

Educational opportunities extend from early childhood programs to graduate degrees. The Kiamichi Technology Centers – CareerTech train over 2,500 students in full-time programs and 20,000 students in short-term classes each year. Southeastern Oklahoma State University, Carl Albert State College, and Eastern Oklahoma State College offer post-secondary degrees on six campuses.

LARGEST HIGHER EDUCATION COMPLETED FIELDS OF STUDY



WITHIN 150 MILES OUTSIDE CHOCTAW NATION BOUNDARIES	LOCATION	2017 DEGREE COMPLETIONS
UNIVERSITY OF TEXAS	ARLINGTON, TX	12,403
UNIVERSITY OF NORTH TEXAS	DENTON, TX	9,026
UNIVERSITY OF TEXAS	DALLAS, TX	7,081
UNIVERSITY OF OKLAHOMA	NORMAN, OK	6,437
UNIVERSITY OF ARKANSAS	FAYETTEVILLE, AR	6,284
OKLAHOMA STATE UNIVERSITY	STILLWATER, OK	5,855
SOUTHERN METHODIST UNIVERSITY	DALLAS, TX	4,183
TEXAS WOMEN'S UNIVERSITY	DENTON, TX	3,780
UNIVERSITY OF CENTRAL OKLAHOMA	EDMOND, OK	3,209

Choctaw student
Oklahoma Public Schools



COMMON EDUCATION STUDENTS 38,694

CAREER CERTIFICATE COMPLETIONS 714

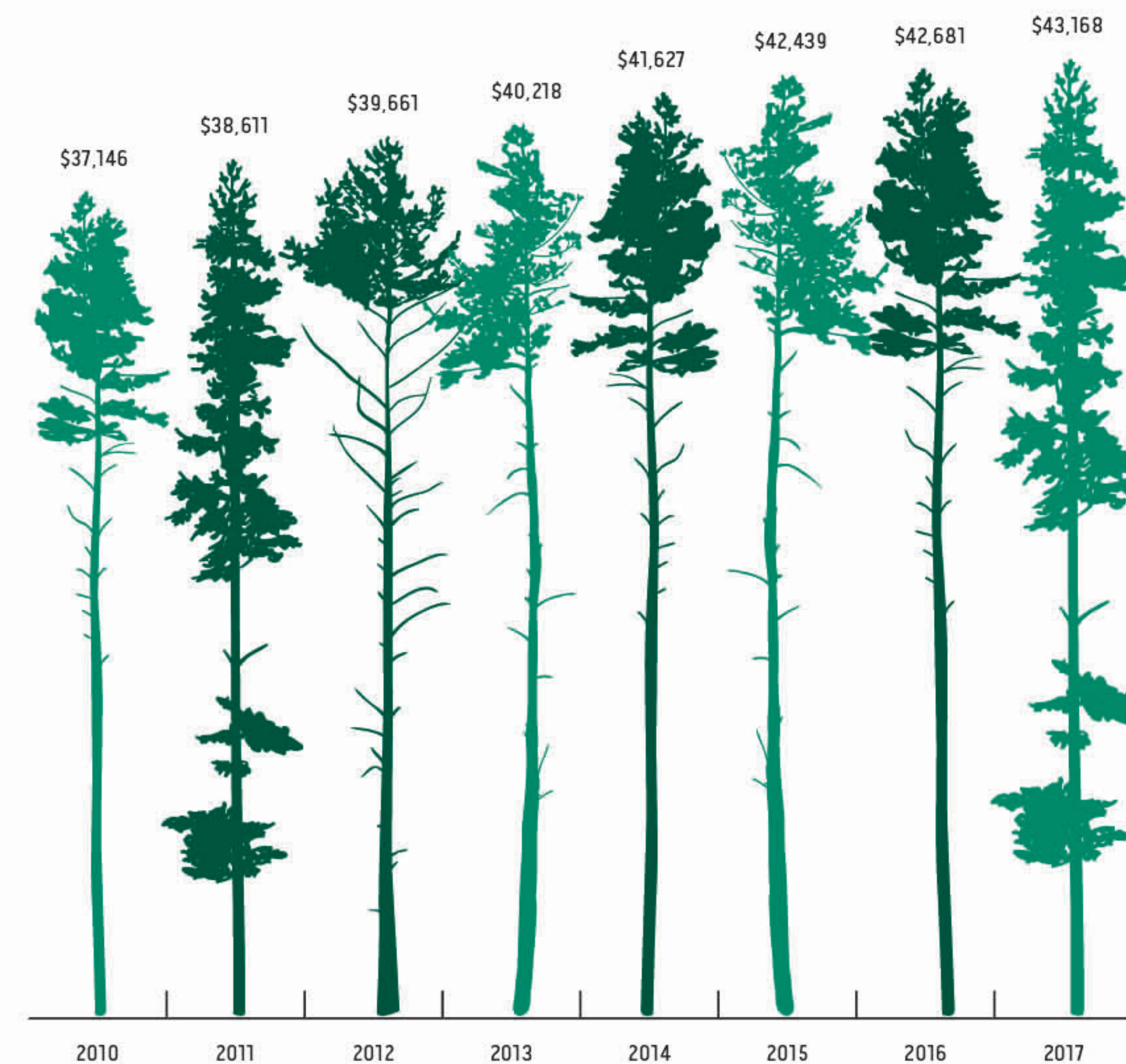
SCHOOL DISTRICTS 90

CAREER TECHNOLOGY SCHOOLS 10

SECONDARY EDUCATION CAMPUSES 6

DEGREE COMPLETIONS 1,603

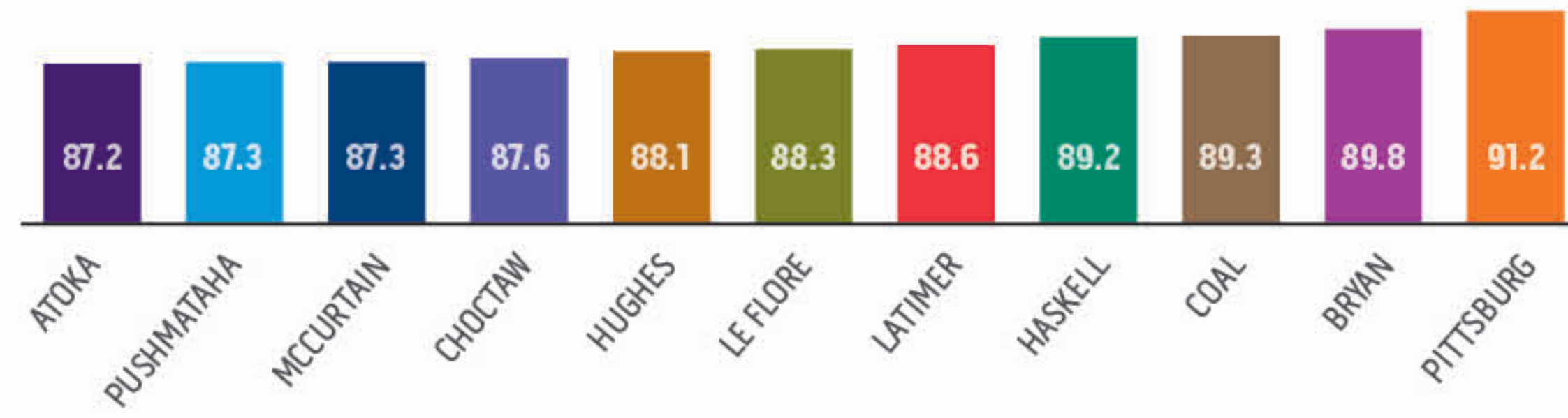
SOUTHEASTERN OK STATE UNIVERSITY	844
KIAMICHI TECH CENTERS-CAREERTECH	600
CARL ALBERT COLLEGE	486
EASTERN OK STATE COLLEGE	273



DEMOGRAPHICS
AVERAGE ANNUAL EARNINGS
 U.S. = \$55,322 AND OKLAHOMA = \$48,038

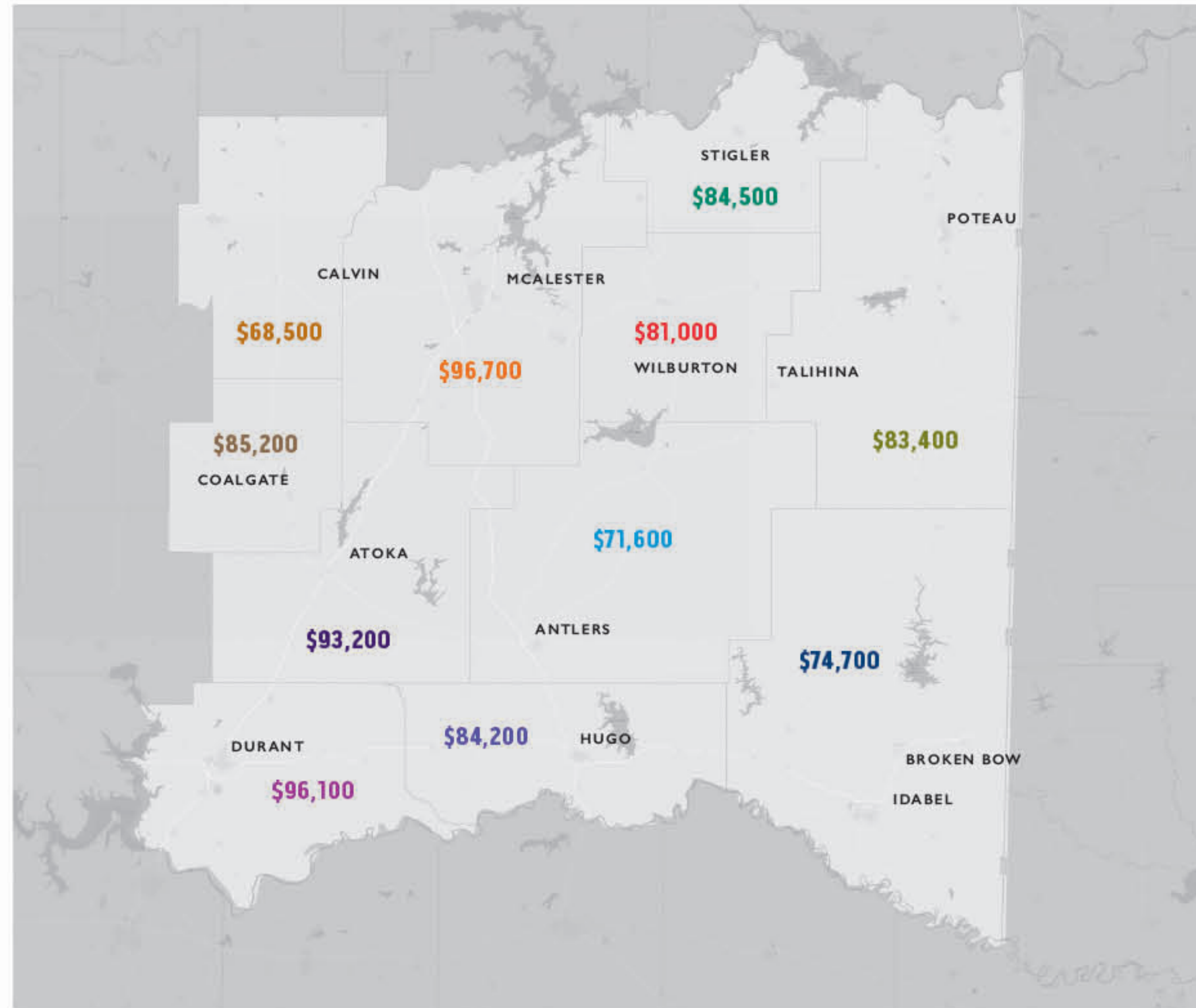
The average annual earnings have grown by \$16,704 since 2000, which is a 63% increase. Since the 2008 recession, the annual growth rate has been 2.3% but has failed to approach the annual growth rates of pre-recession (4%). The poverty rate for the State of Oklahoma is 16.1% and Pittsburg county is the only county in the region that is below the state rate. No county rate is below the U.S. poverty rate of 14.0%.

COST OF LIVING RATIO BY COUNTIES (U.S. = 100%)



MEDIAN HOME VALUE

U.S. = \$184,700 AND OKLAHOMA = \$121,300

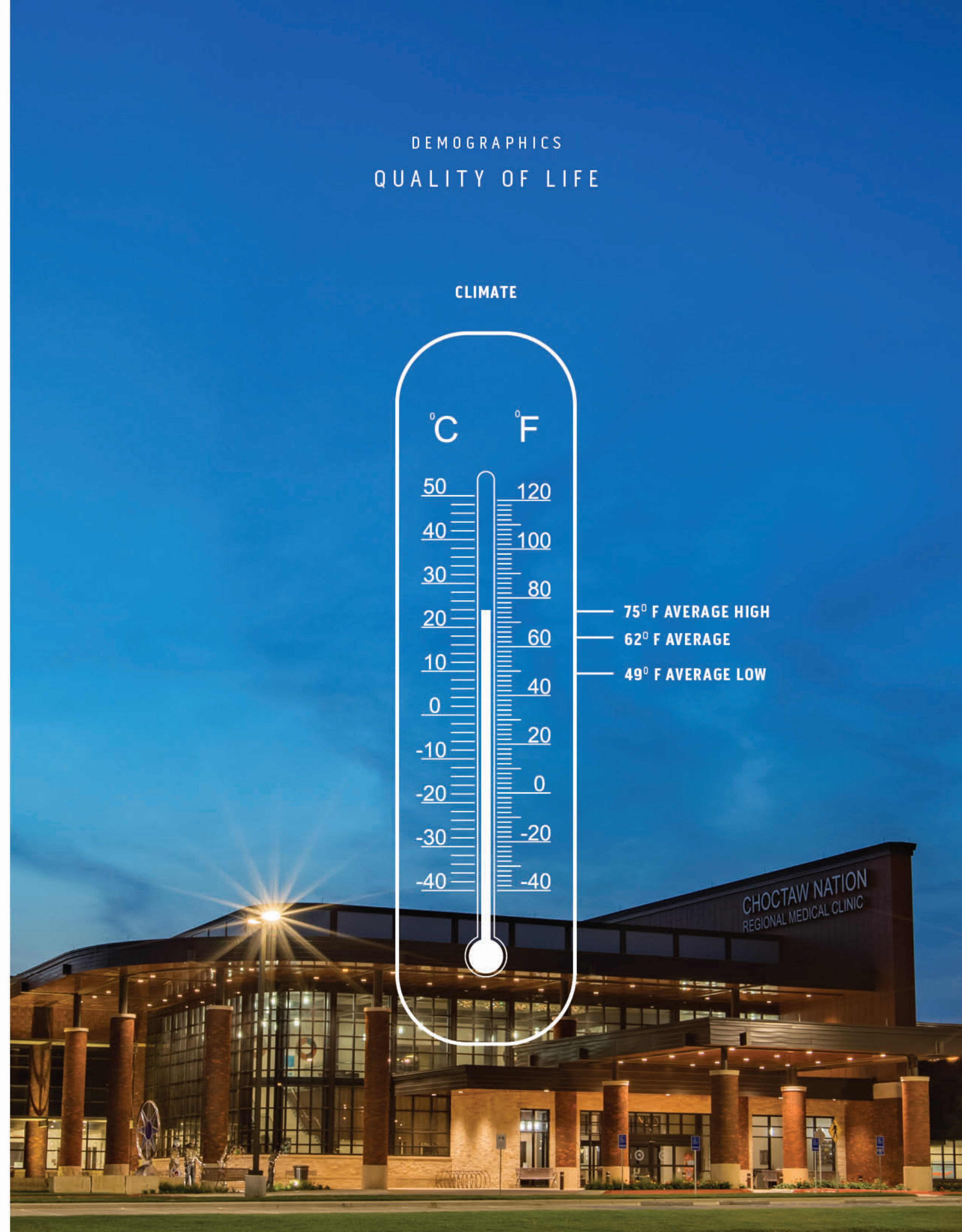
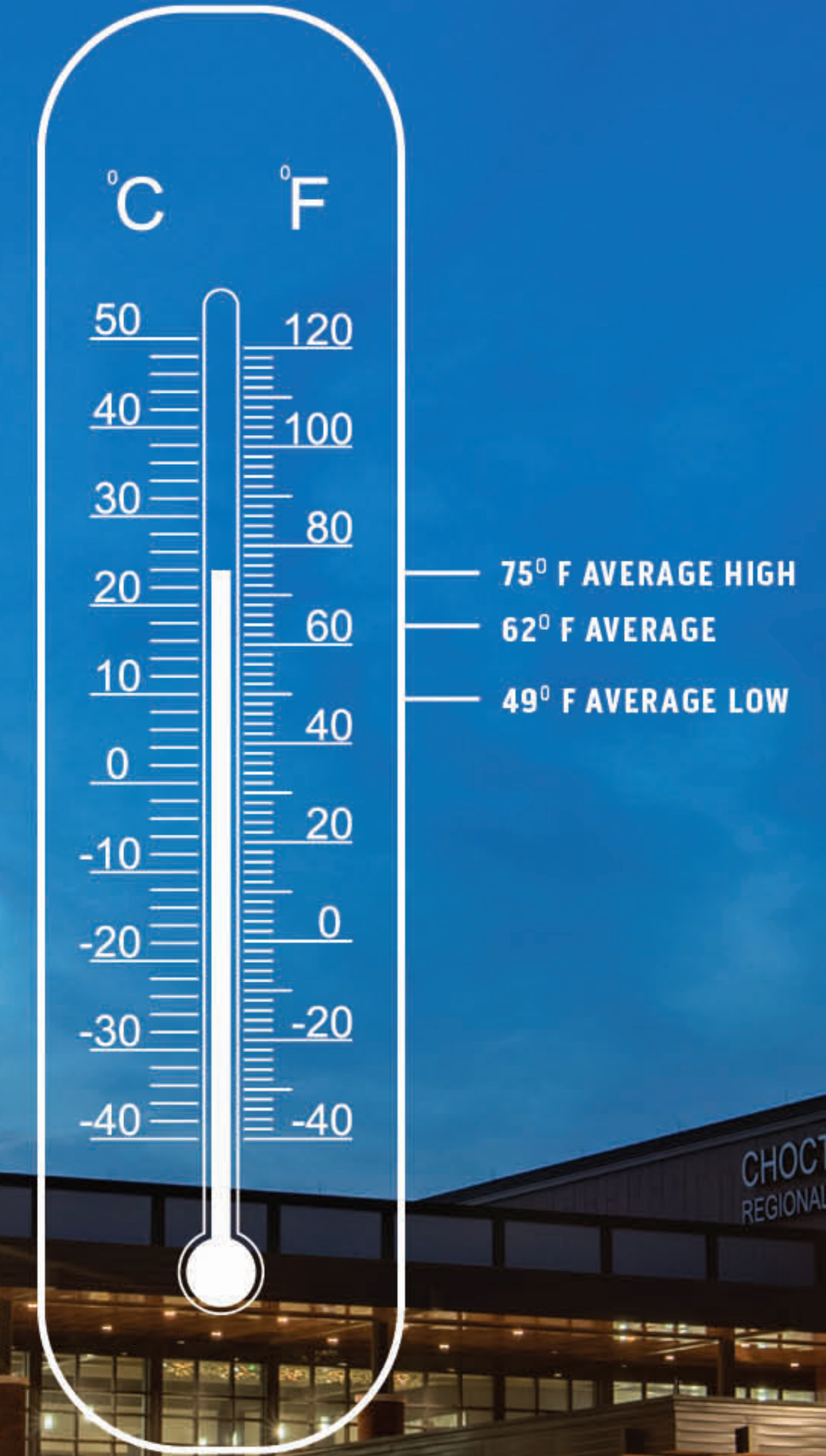


The overall cost of living within the Choctaw territory is 10-13% below the national average. These figures are indicative of Oklahoma as a whole (88%) which CNBC ranks as the 5th lowest in the United States.

Choctaw Nation Regional Medical Clinic
Durant, Bryan County, OK

DEMOGRAPHICS
QUALITY OF LIFE

CLIMATE



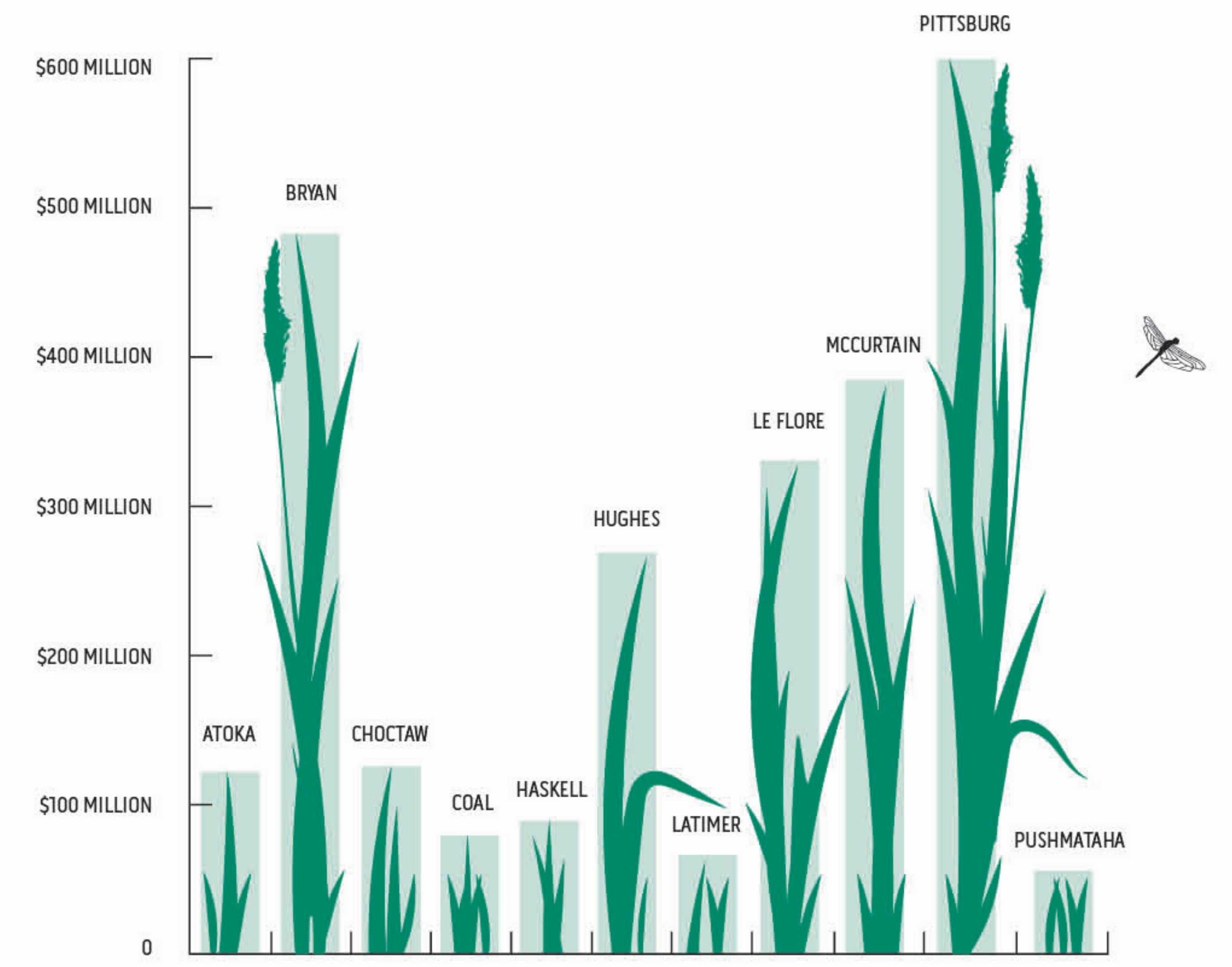


Retail sales have increased by over 53% since 2010 and have grown 4.3% annually over the last 10 years.

Early Choctaw baskets are made of split river cane and palmetto, colored with plant dyes. A wide variety of intricate forms were made and developed by ancestral Choctaw people. Many of them were used for food preparation, storage/transportation, or as items of gift and exchange. The Choctaw Stores provide a platform for Choctaw artists to sell some of their handcrafted traditional baskets.

RETAIL SALES BY COUNTY

With the exception of a statewide Oklahoma recession (2015-2016), businesses in the region have experienced record growth in four of the last six years.

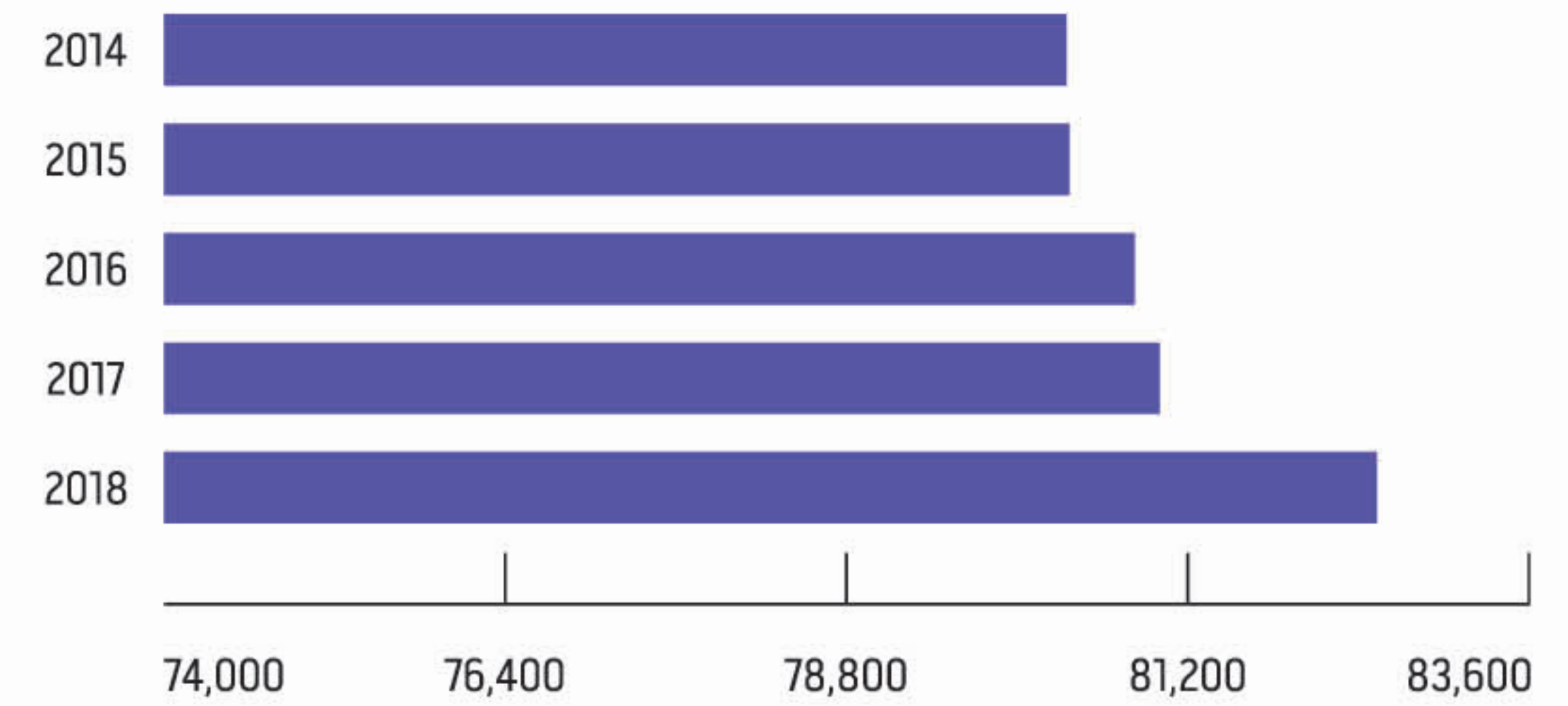


WORKFORCE COMMUTER FLOW



Choctaw Nation has a net out-migration of workers to/from the area. Approximately 30% of the area workforce commutes into the territory. While this indicates a strong economy which attracts workers, there are opportunities for job creation, as 29,000 residents commute to jobs outside the 10 ½ county territory.

WORKFORCE ANNUAL GROWTH



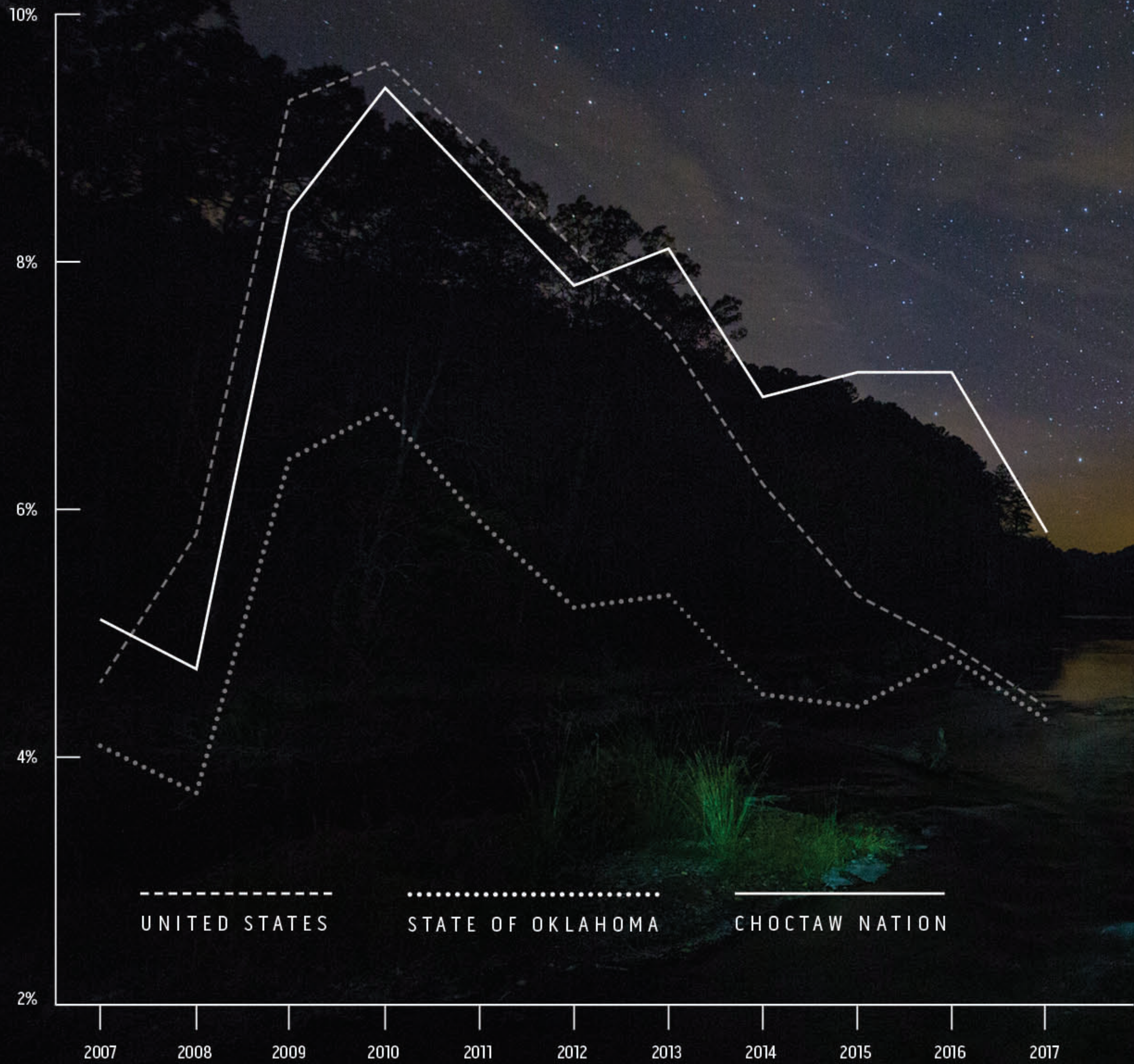
BY OCCUPATION HIGHEST EMPLOYMENT



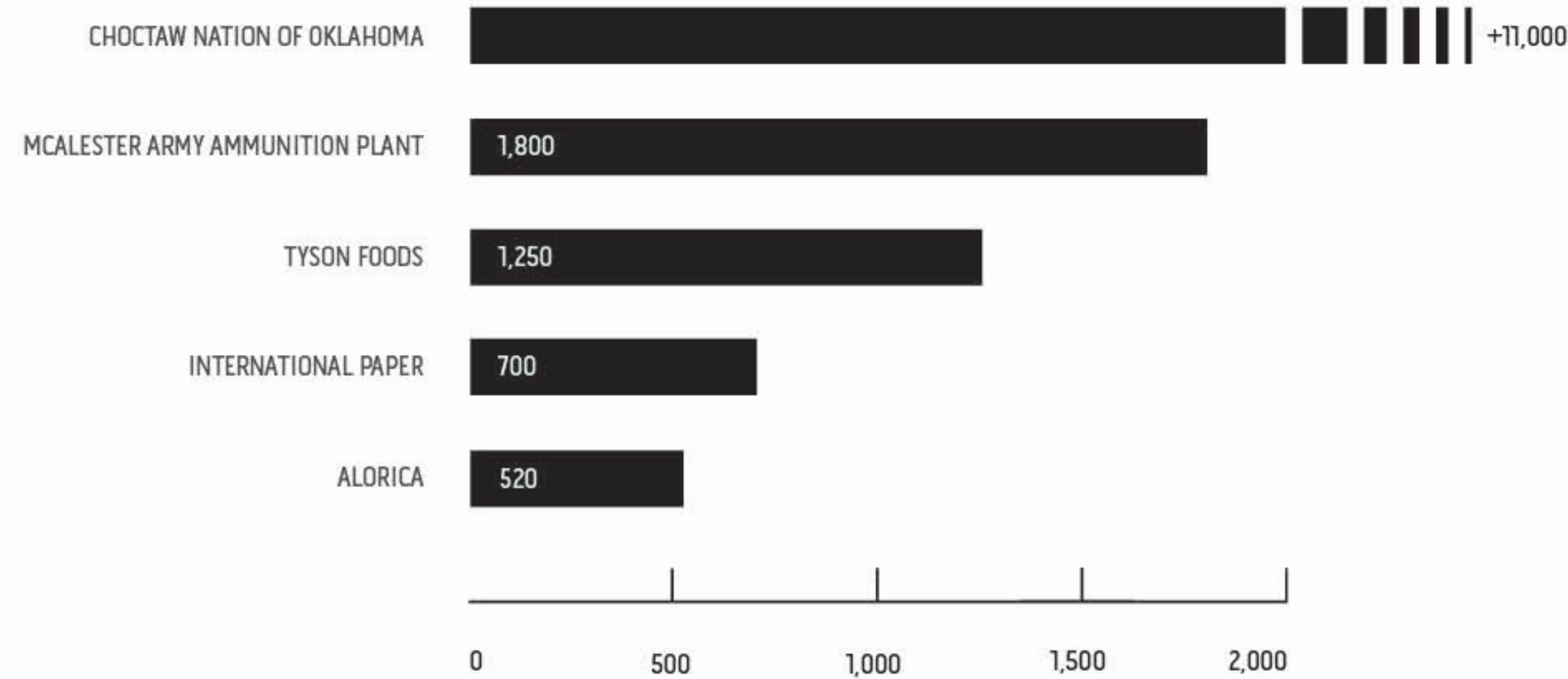


WORKFORCE UNEMPLOYMENT RATES

Choctaw Nation and our community partners are working together to reduce the unemployment rates within the territory by recruiting new jobs, working with existing establishments to expand, and assisting entrepreneurs to start new businesses.

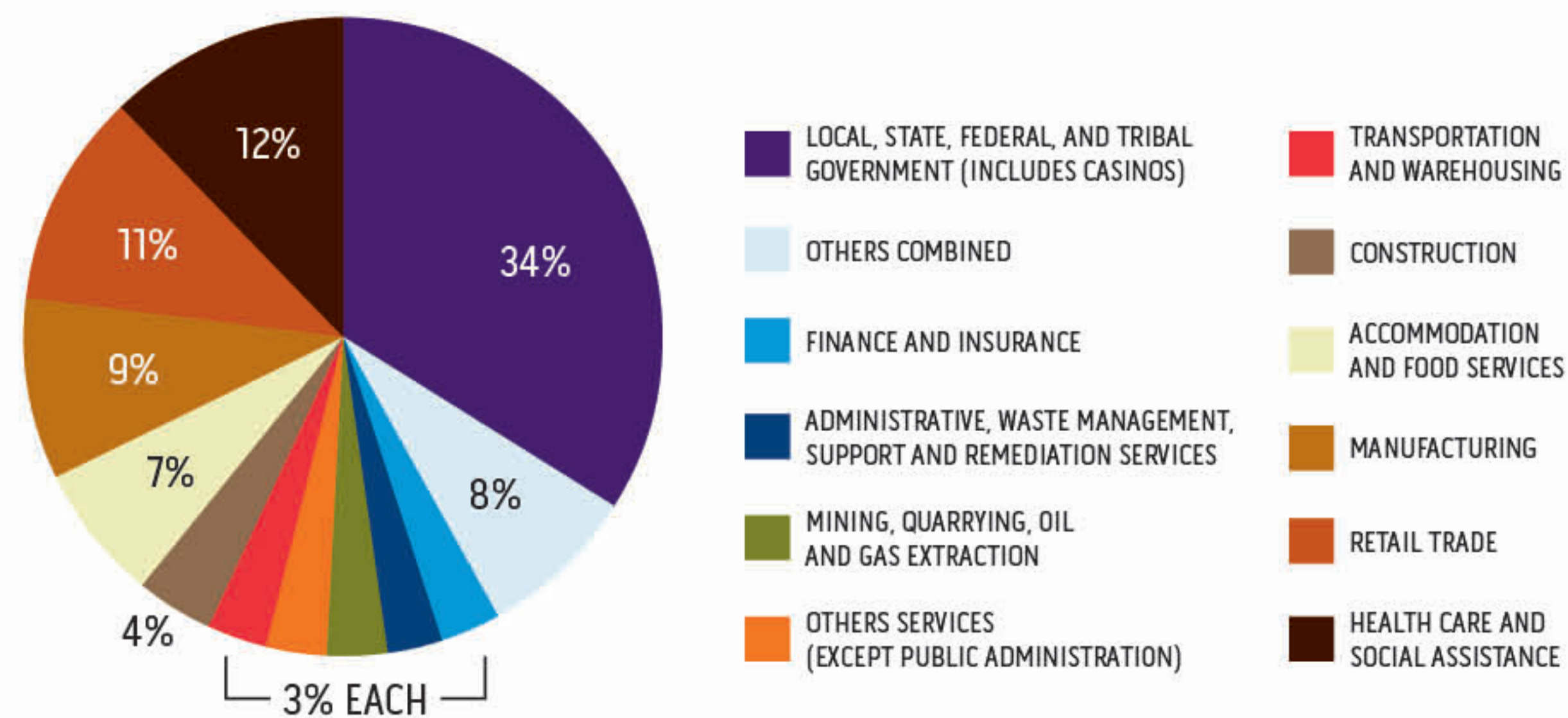


INDUSTRY LARGEST EMPLOYERS

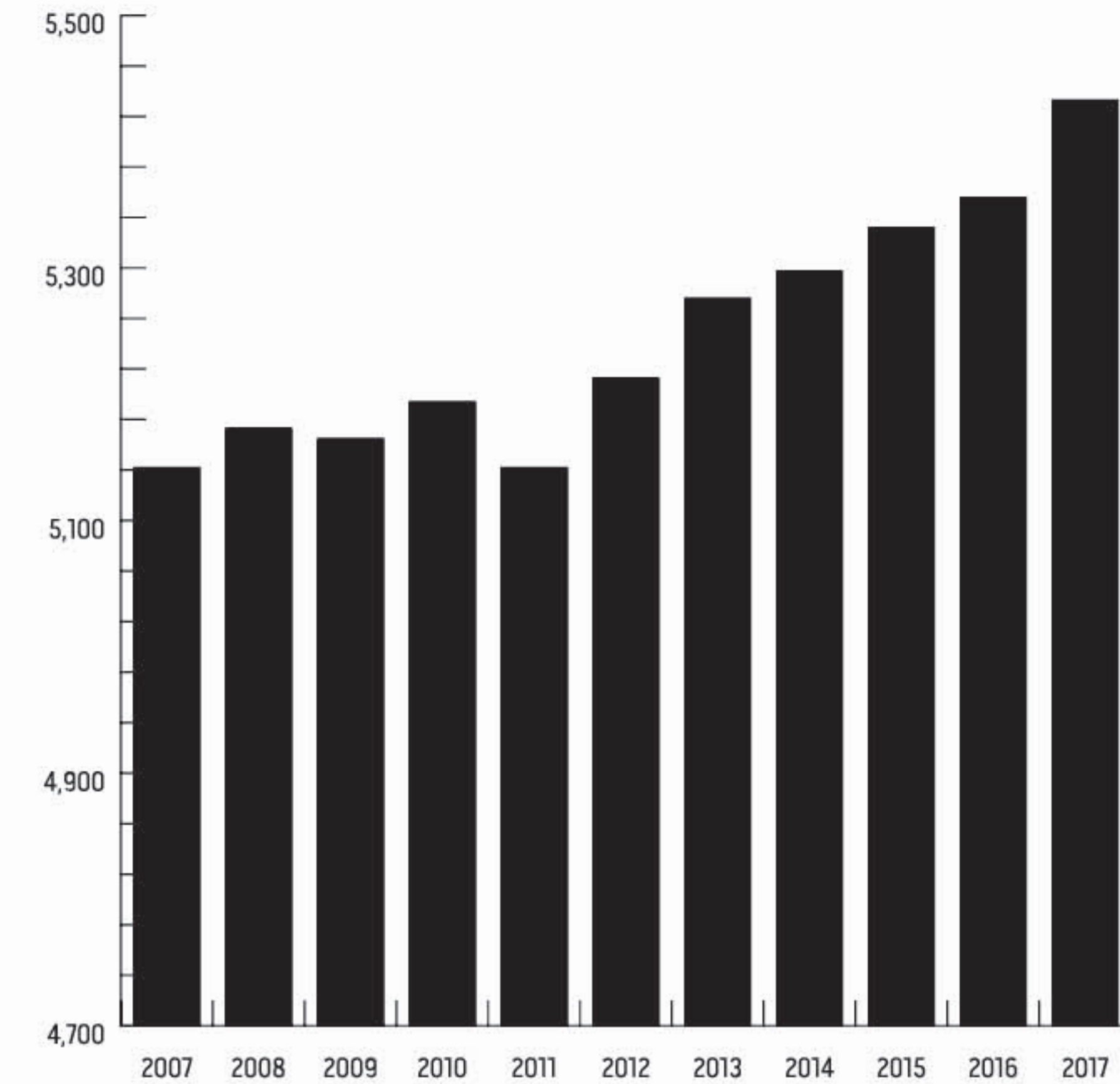


The two largest employment sectors employ 46% of the total workforce.

BASED ON 182,500 TOTAL EMPLOYEES SECTOR BREAKDOWN



INDUSTRY BUSINESS ESTABLISHMENTS



Over the last five years, the number of businesses have grown by 4.2% which is higher than the State of Oklahoma (1.6%), but considerably lower than the U.S. rate of 7.6%.

Choctaw Nation has led the region in job growth for several years and has become the largest employer in the territory. The fastest growing "value-added" sectors include beverage products, petrochemical and coal products, crop production, and furniture products, each

of which have doubled the number of jobs in the last five years. Government services, social assistance, fabricated metal product manufacturing, and motor vehicle/parts dealers have shown the largest increase in actual job count.

INDUSTRY
GROSS REGIONAL PRODUCT



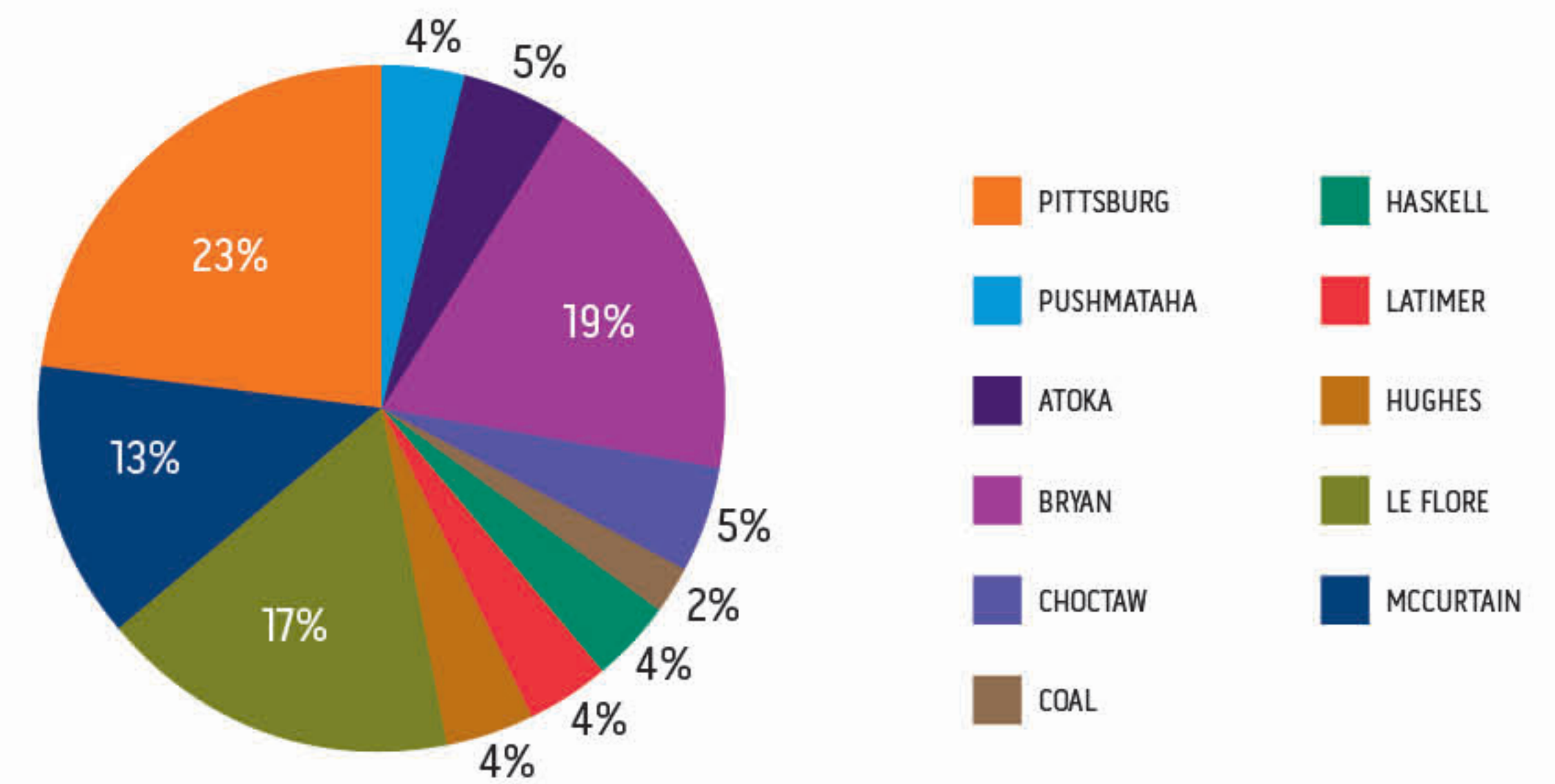
Over the last decade, the GRP has averaged 2.2% growth and is approaching \$8 billion.

The wild gourd was one of the earliest products to be domesticated and widely grown by the Choctaws. Gourds were used for practical functions as well as art forms, which is a medium still chosen by today's Choctaw artists.

INDUSTRY
INVESTMENTS / ASSESSED VALUE

The assessed value of real property within the Choctaw Nation has grown by 61% since 2006 (4.7% annually). In 2016, the growth rate was 6% which was the highest rate since 2009. Of the 10 1/2 counties, 74% of the assessed value is in four counties, with Bryan and Pittsburg counties being the largest at 22% and 23% respectively.

BASED ON \$7.5 BILLION TOTAL
GROSS REGIONAL PRODUCT BY COUNTY



The four corners of the Choctaw Nation are the economic drivers, with the four counties making up over 70% of the Gross Regional Product.



ECONOMIC DEVELOPMENT
 BUSINESS RETENTION, EXPANSION, AND
 ATTRACTION SUCCESSES

Choctaw Nation teams with Economic Developers and organizations to form regional and community partnerships that promote business development to grow our state and tribal economies. The Choctaw Development Fund provides cash incentives for Choctaw small businesses, business recruitment, community revitalization, beautification, infrastructure, and tourism.

Diamond T Trailers
 Pushmataha County, OK



CMC Commercial Metals Company, Inc. of Irving, TX constructed a steel mill in Durant, OK at a

\$300,000,000 CAPITAL INVESTMENT AND THE CREATION OF 240 NEW JOBS.

The Hitchcock Distributing, Inc. expansion in Durant, OK consisted of a

\$3,000,000 CAPITAL INVESTMENT AND THE CREATION OF 10 NET NEW JOBS.

Nevada Railroad Materials, Inc. of South Ogden, UT chose to grow their operations in Wister, OK with a

\$4,275,000 CAPITAL INVESTMENT AND THE CREATION OF 55 NEW JOBS.



United Parcel Service, Inc. relocation project to Durant, OK consisted of a

\$1,900,000 CAPITAL INVESTMENT AND THE CREATION OF 45 NEW JOBS.

SteelFab Texas, Inc. relocation project to Durant, OK consisted of an

\$11,750,000 CAPITAL INVESTMENT AND THE CREATION OF 150 NET NEW JOBS.



Webstaurant Store of Lancaster, PA opened a new distribution center in Durant, OK at an

\$8,000,000 CAPITAL INVESTMENT AND THE CREATION OF 160+ NEW JOBS. THE NEW FACILITY OPENED IN THE SUMMER OF 2017.

The BrucePac, Inc. of Woodburn, OR expanded their production facility in Durant, OK with a

\$5,000,000 CAPITAL INVESTMENT AND THE CREATION OF 150 NEW JOBS.

Teal-Jones Group, Inc. of Surrey, BC, Canada elevated the Antlers saw mill within their corporate structure by investing

OVER \$15,000,000 CAPITAL INVESTMENT AND THE CREATION OF 60 NEW JOBS.

248 TRAINING EVENTS

83 BUSINESS EXPANSIONS

**721 TOTAL JOBS
CREATED**

104 BUSINESS STARTUPS

670 CHAHTAPRENEURS

BUSINESS DEVELOPMENT
CHAHTAPRENEURSHIP

Choctaw Small Business Development is supporting the vision of the Choctaw Nation by providing assistance to tribal entrepreneurs that want to start or expand their business within the 10 ½ counties.



“ My business is rooted in my passion for my culture. ”

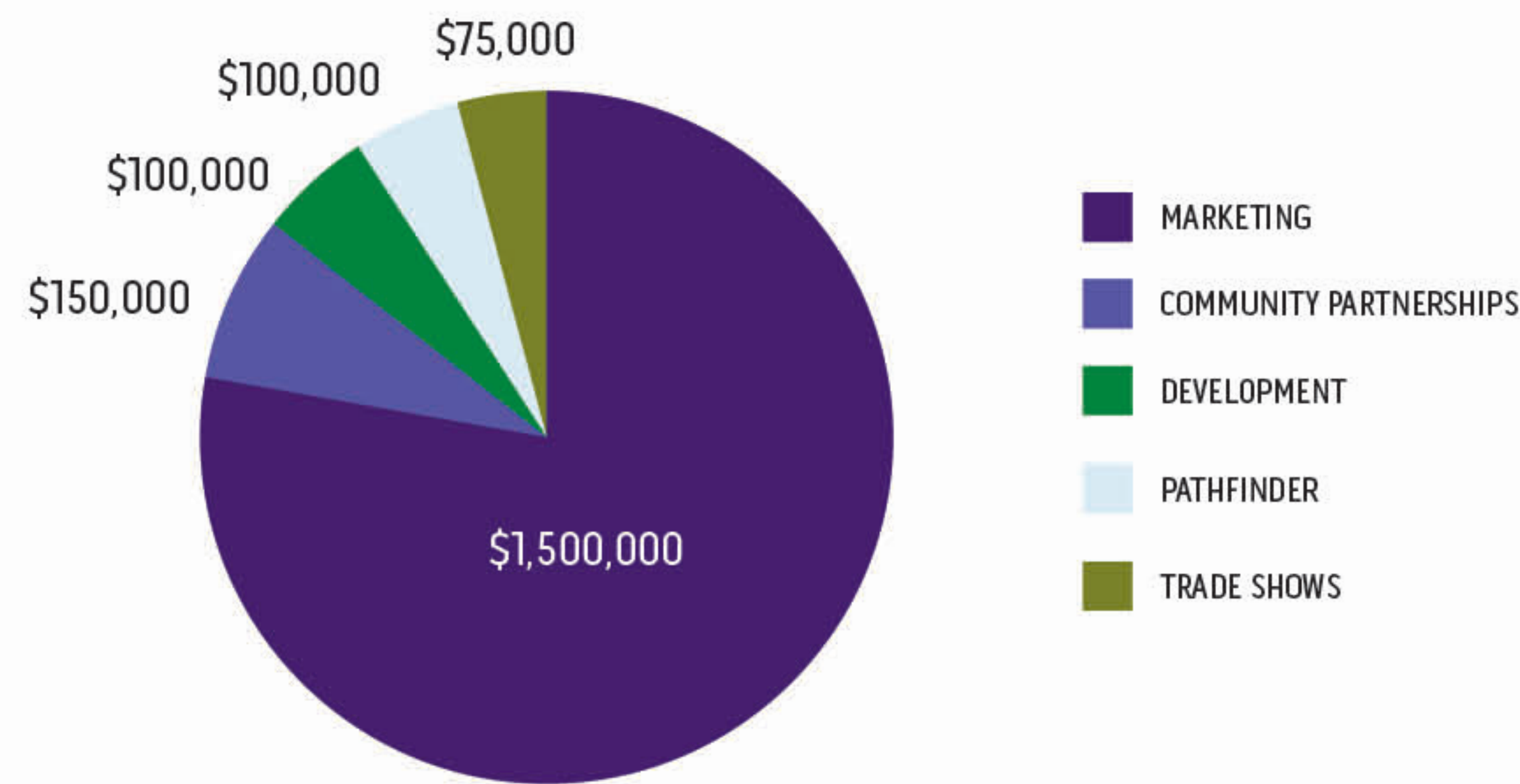
“Choctaw Nation has helped me to create a current business model that is true to the traditions that inspire me. From harvesting materials from my land, to a finished product in the hands of my customers, the Choctaw Nation has helped my business grow and spread the passion of the Chahta culture and spirit for ishta boli (stickball).”

Brenner Billy
Chahtapreneur behind Billy Ikbi custom stick and stickball-making

*Handmade traditional stickball and sticks
Billy Ikbi (made by Billy)*

TOURISM CHOCTAW COUNTRY

Choctaw Nation has invested more than \$2 million in tourism activities and growth since 2013. More than \$25,000 is invested annually to develop attractions and improve visitor experiences in Choctaw Country.



Choctaw Country promotes and partners with 70+ attractions, 100+ events, and 25+ community partners.

Choctaw Country is 11,000 square miles of peaceful getaway. Whether looking to temporarily escape the everyday busyness or to put down roots, southeastern Oklahoma is the idyllic location to slow down. Supporting attractions and annual events that range from down-home style to world-class, Choctaw Country is ideal for the whole family.

Beavers Bend State Park
McCurtain County, OK



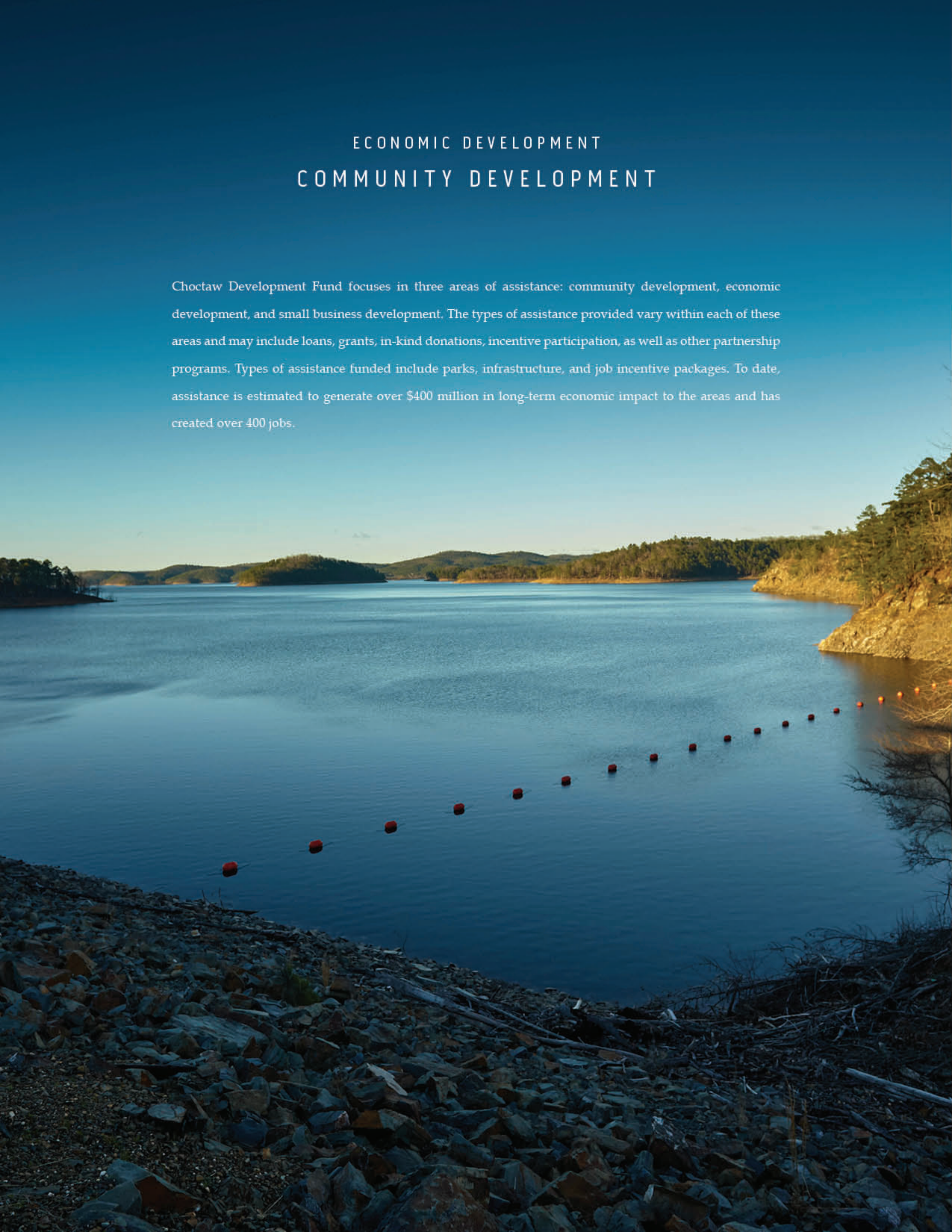
POTENTIAL VISITORS REACHED ANNUALLY

||||| 3.5 MILLION |||||

SOCIAL MEDIA ANNUALLY 2 MILLION	MARKETING ANNUALLY 1 MILLION
TRADE SHOWS ANNUALLY 80-100K	WELCOME CENTER ANNUALLY 350K
PATHFINDER ANNUALLY 20K	

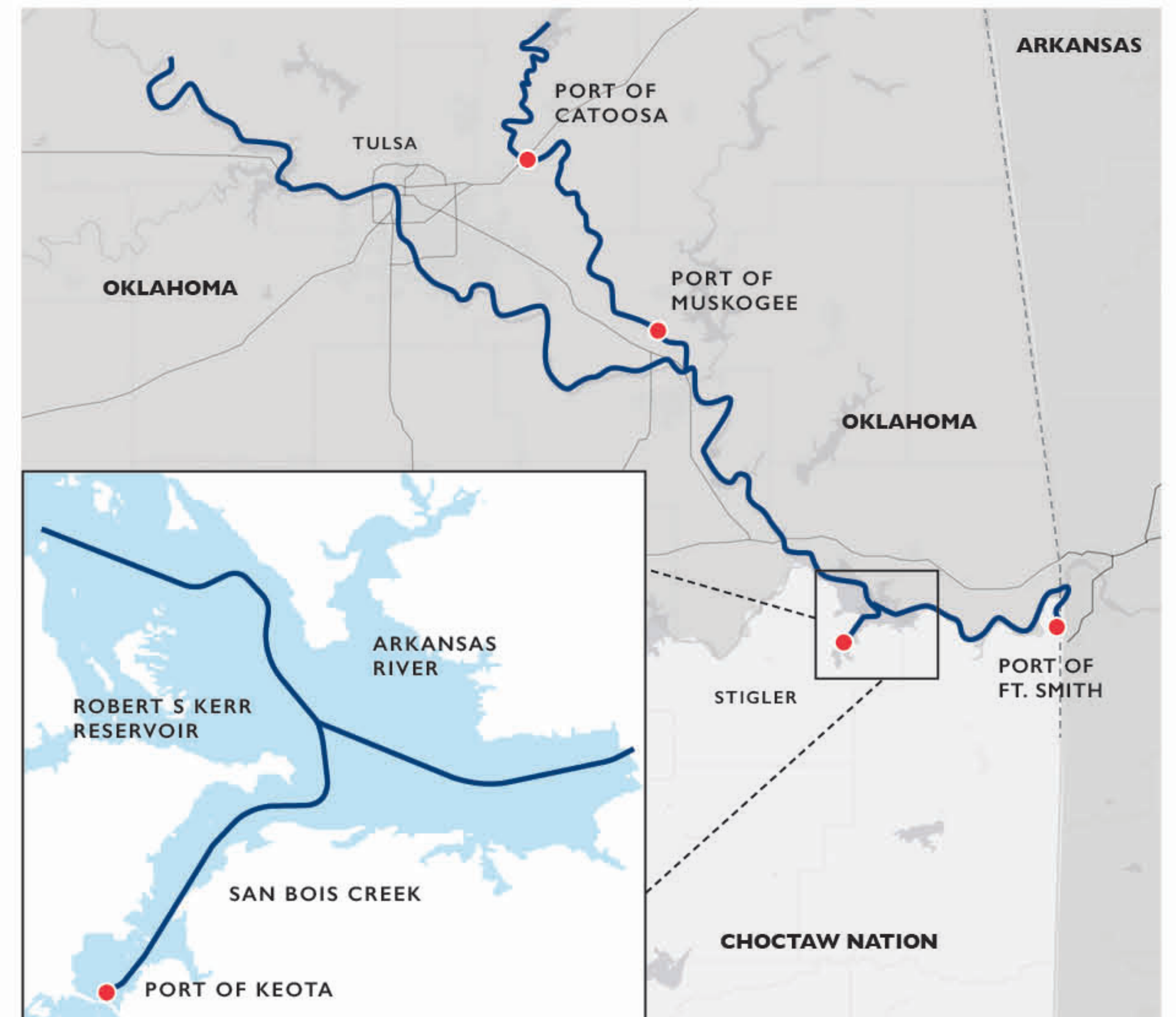
ECONOMIC DEVELOPMENT COMMUNITY DEVELOPMENT

Choctaw Development Fund focuses in three areas of assistance: community development, economic development, and small business development. The types of assistance provided vary within each of these areas and may include loans, grants, in-kind donations, incentive participation, as well as other partnership programs. Types of assistance funded include parks, infrastructure, and job incentive packages. To date, assistance is estimated to generate over \$400 million in long-term economic impact to the areas and has created over 400 jobs.



Tribal leadership created the Choctaw Development Fund to build a stronger quality of life within the Choctaw Nation territory. The fund has issued over \$5.8 million toward community development projects since inception in August 2016.

ECONOMIC DEVELOPMENT WATERWAYS AND PORTS



Four commercial ports are located within 75 miles of the territorial boundaries with direct access to international markets.

ECONOMIC DEVELOPMENT ROADWAYS, RAILROADS, AND AIRPORTS

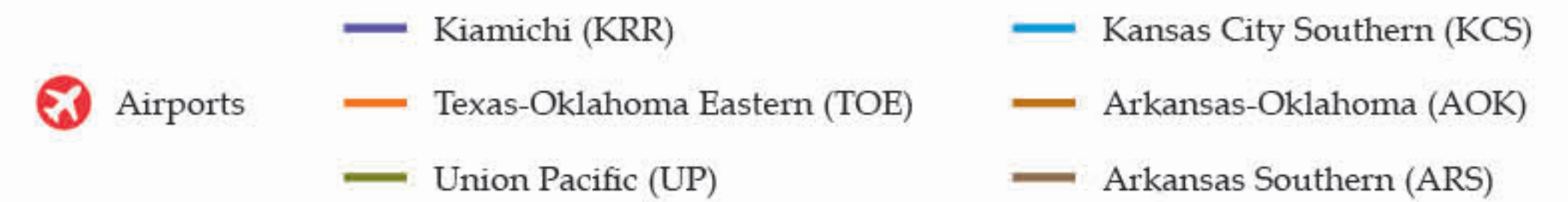
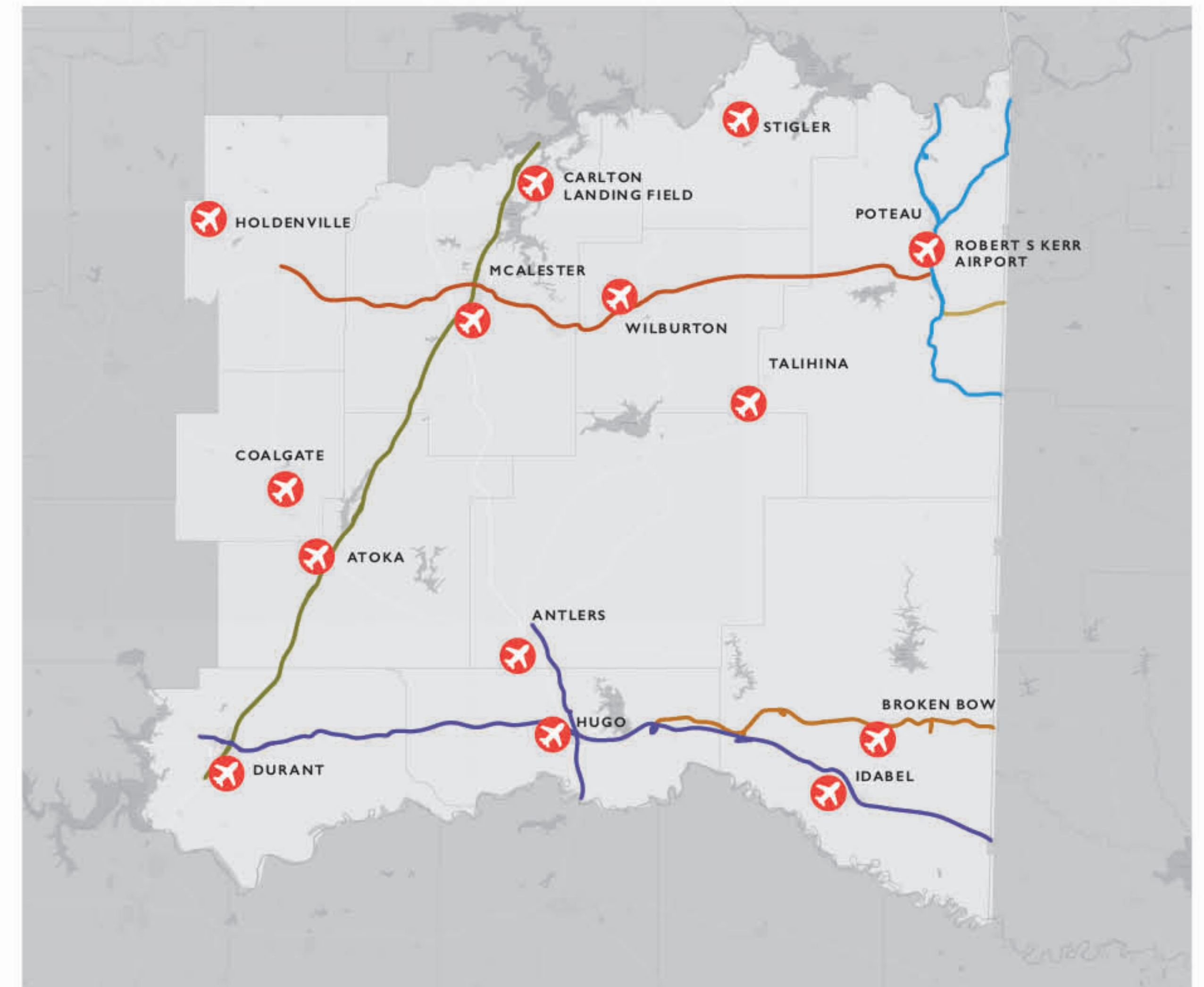
There are a variety of travel options available to residents and businesses within the Choctaw Nation territory.



Significant capital investments are underway to improve the U.S. 69/75 corridor. In 2019, the Oklahoma Department of Transportation will complete a major safety enhancement project in McAlester, OK and will begin a \$120 million enhancement project south of Durant, OK.

Choctaw Nation is served by three Class 1 railroads (Burlington Northern Santa Fe, Kansas City Southern, and Union Pacific) which provide direct access to the Gulf of Mexico and the Pacific Ocean. The three short line railroads in the territory are Arkansas-Oklahoma (AOK), Kiamichi

(KRR), and Texas-Oklahoma Eastern (TOE). These local lines branch from the rail corridors and serve industrial clients in several communities. Oklahoma's highest grain destination is via the KCS in Heavener, and the largest rock origination is via the UP in Stringtown.



Six Commercial airports (Dallas-Fort Worth, Oklahoma City, Fort Smith, Tulsa, NW Arkansas, and Texarkana) are located within 90 miles of Choctaw Nation boundaries with direct international flights from Dallas-Fort Worth airport. The 13 public general aviation airports within the Choctaw Nation provide convenient access to many U.S. markets.

MOVING FORWARD GROWTH

Utilizing Economic Development Administration resources, Choctaw Nation commissioned two consulting firms to identify potential industrial sites and create economic development plans for the region, as well as plans for each county.

TARGETED INDUSTRIAL SECTORS BY COUNTY

COUNTIES	FOOD PROCESSING	NATURAL RESOURCES AND VALUE CHAIN	TOURISM	AEROSPACE/DEFENSE	RE-MANUFACTURING	LOGISTICS
ATOKA	●	●		●	●	●
BRYAN	●	●	●	●	●	●
CHOCTAW	●	●	●			
COAL	●	●				
HASKELL	●	●			●	●
HUGHES	●	●				
LATIMER	●	●	●			
LE FLORE	●	●	●		●	●
MCCURTAIN	●	●	●		●	●
PUSHMATAHA	●	●	●		●	
PITTSBURG	●	●	●	●	●	●

TIP Strategies of Austin, TX was commissioned to conduct a Target Industry Study to narrow the focus of economic development marketing efforts to generate leads and attract new businesses. Target industries represent the best opportunities for new investment and job growth. A three-pronged approach included a quantitative analysis of industry trends both regionally and nationally; qualitative input about the region's unique assets and key challenges; and strategic factors that will influence industry growth regionally, nationally, and globally.

Annual Choctaw Nation Labor Day Festival
Tvshkahoma, Pushmataha County, OK



DESIRED RESULTS
STRATEGIC GOALS

1. Business Attraction

Develop overall marketing plan

Launch regional economic development website

Develop sector-specific marketing materials

Generate own leads

Prepare 3-5 sites to become construction-ready

2. Business Retention and Expansion

Build relationships with existing companies

Create regional Customer Relationship Management Programs

Identify and respond to business' needs

Track regional trends and needs

3. Community Capacity

Train community leaders on economic development

Cultivate civically engaged visionary leaders

4. Workforce

Strengthen partnerships in education, training, and the Workforce Investment Board

5. Public Relations

Raise visibility of the Choctaw Nation territory

Expand upon community development projects

Develop unique cultural tourism assets

Facilitate housing construction

6. Operations

Formalize partnerships and processes with communities

Formalize tribal incentive program and process

DIRECTION
STRATEGIC PLAN PRIORITIES

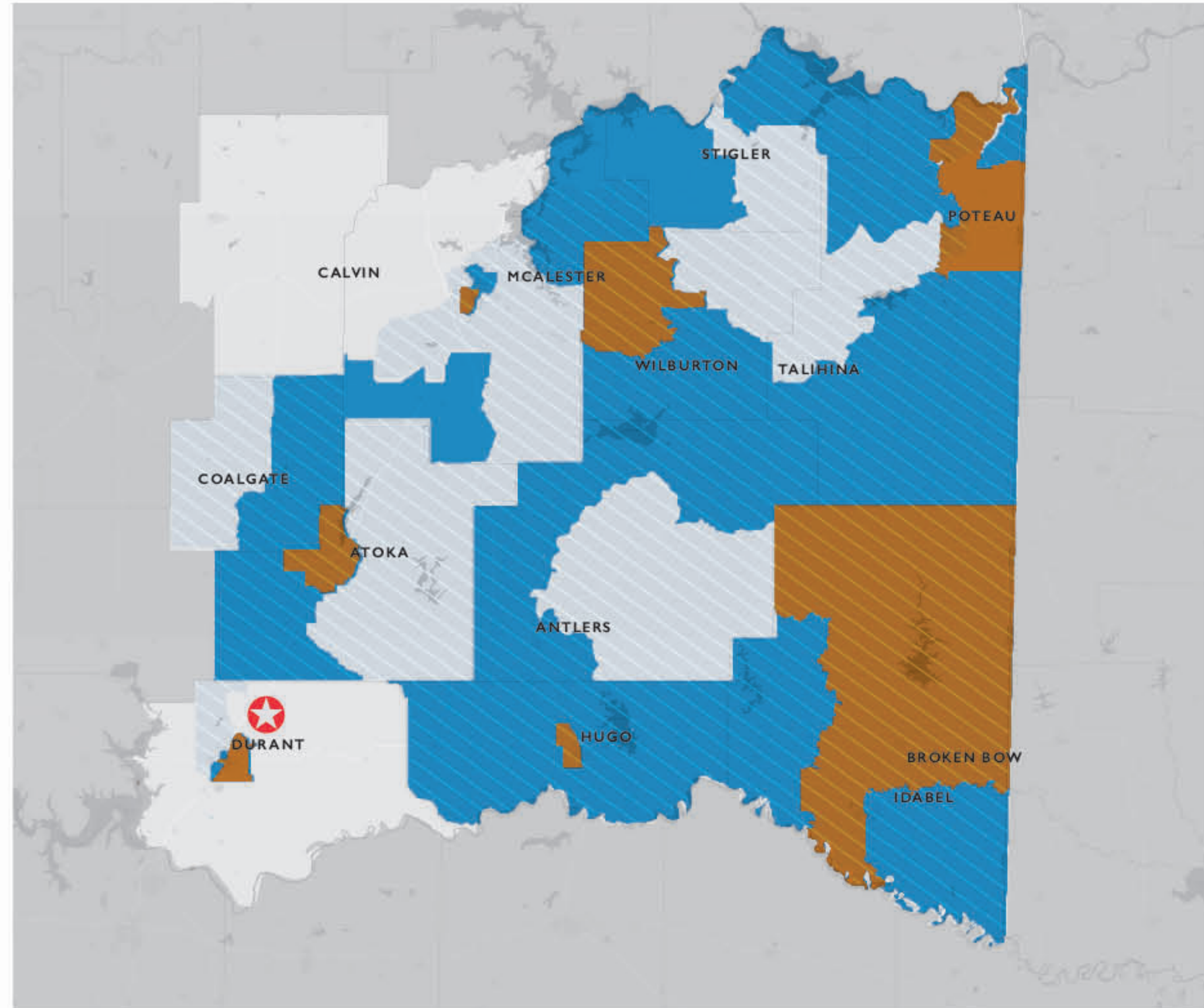
1. Create a business retention and expansion initiative
2. Create an internal lead generation process
3. Build leadership and economic capacity at the local level
4. Develop stronger relationships between training, education, and employers
5. Develop community assets to improve quality of place and competitiveness
6. Raise visibility of the region and Choctaw Nation

A marketing plan will be developed in the coming year to maximize implementation for the strategic initiatives; the plan will be based on the strategic plan for CNO and local leaders will be included when there is commonality.

DIRECTION
PLAN IMPLEMENTATION

- 1. Create industry profiles for each of the five targeted sectors:**
 - Market opportunities*
 - Trends*
 - Staffing patterns*
 - Industry intelligence*
 - Strategic considerations*
- 2. Refine strategic framework and action plan**
- 3. Draft community strategies**

MOVING FORWARD STATE AND FEDERAL INCENTIVES



- Foreign Trade Zone 227
- Promise Zone
- Opportunity Zones
- New Market Tax Credits

Businesses locating to Choctaw territory can gain an advantage from several state and federal incentive programs, such as: Oklahoma Enterprise Zone, Historically Underutilized Business Zone (HUBZone), Foreign Trade Zone (FTZ-227), EB-5 Visa Program, Promise Zone, Strikeforce Zone, Opportunity Zones, and New Market Tax Credits. In some instances, the entire 10 ½ territory qualifies for the incentive program.

Choctaw Wellness Center
Durant, Bryan County, OK



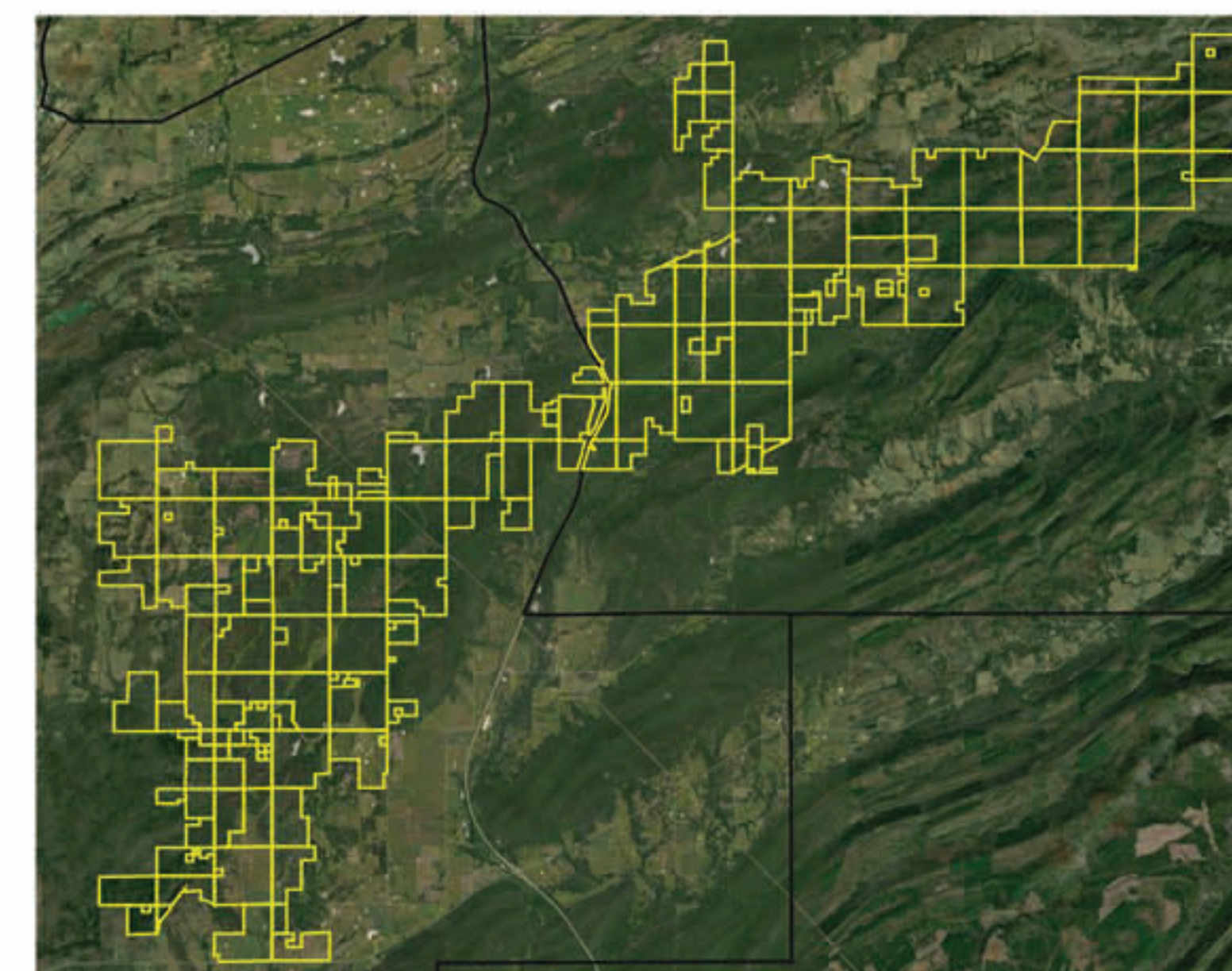
The 44,000 square foot wellness center opened in April 2018 at a cost of \$15.5 million. Choctaw Nation utilized New Market Tax Credits and saved \$3.5 million allowing for future investments in programs and services for tribal members.



MOVING FORWARD
UNMANNED AIRCRAFT SYSTEM
INTEGRATION PILOT PROGRAM

Choctaw Nation of Oklahoma is building a one-of-a-kind "National Test Site" to support innovative research, development, testing, and evaluation of emerging manned and Unmanned Aircraft System (UAS) technologies in a safe and low-risk environment. Located on 44,000+ acres, Choctaw Nation's ownership offers a unique opportunity for sophisticated testing and safe operations in the immediate airspace, thus providing strict management of ground access and ground risk to ensure privacy during test operations.

In May 2018, the U.S. Department of Transportation selected Choctaw Nation as the only Native American tribal government to receive one of 10 UAS Integration Pilot Program (UASIPP) designations.



As a sovereign Nation with 100% ownership of the National Test Site, CNO offers total control of ground space, ground risk, and ground access. The UAS and Urban Air Mobility (UAM) initiative will entail ongoing operational flight testing of vehicles to experiment and understand the broad spectrum of applications including passenger, cargo, and other opportunities.

*Agricultural testing on Daisy Ranch
Daisy, Atoka County, OK*

The economic impact made by the Choctaw Nation accelerated opportunities of growth and prosperity for the tribe and the State of Oklahoma.

\$2.4 BILLION TRIBAL ASSETS

8,358 DIRECT JOBS SUPPORTED

2016 CHOCTAW NATION TOTAL ECONOMIC IMPACT
\$1,868,451,097

\$518 MILLION DIRECT INCOME PAYMENTS

12,161 JOBS SUPPORTED

SPECIAL THANKS TO OUR
PROMINENT LOCAL ECONOMIC
DEVELOPMENT PARTNERS

The Choctaw Nation's Economic Development team works closely with community and business leaders throughout the 10 ½ counties.

Public Service Company of Oklahoma

Oklahoma Gas and Electric

Western Farmers Electric Cooperative

Choctaw Electric

Kiamichi Electric

Cookson Hills Electric

Southeastern Electric

People's Electric

Oklahoma Natural Gas

CenterPoint Energy

Arkansas Oklahoma Gas

City of McAlester

City of Coalgate

Atoka City Industrial Development Authority

Durant Industrial Authority

Stigler Chamber of Commerce

Wilburton Industrial Authority


City of Antlers

Choctaw County Industrial Authority

City of Poteau

City of Broken Bow

City of Idabel



For more information on
partnering with us please
call (580) 924-8280 ext. 4507

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Business & Economic Development
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