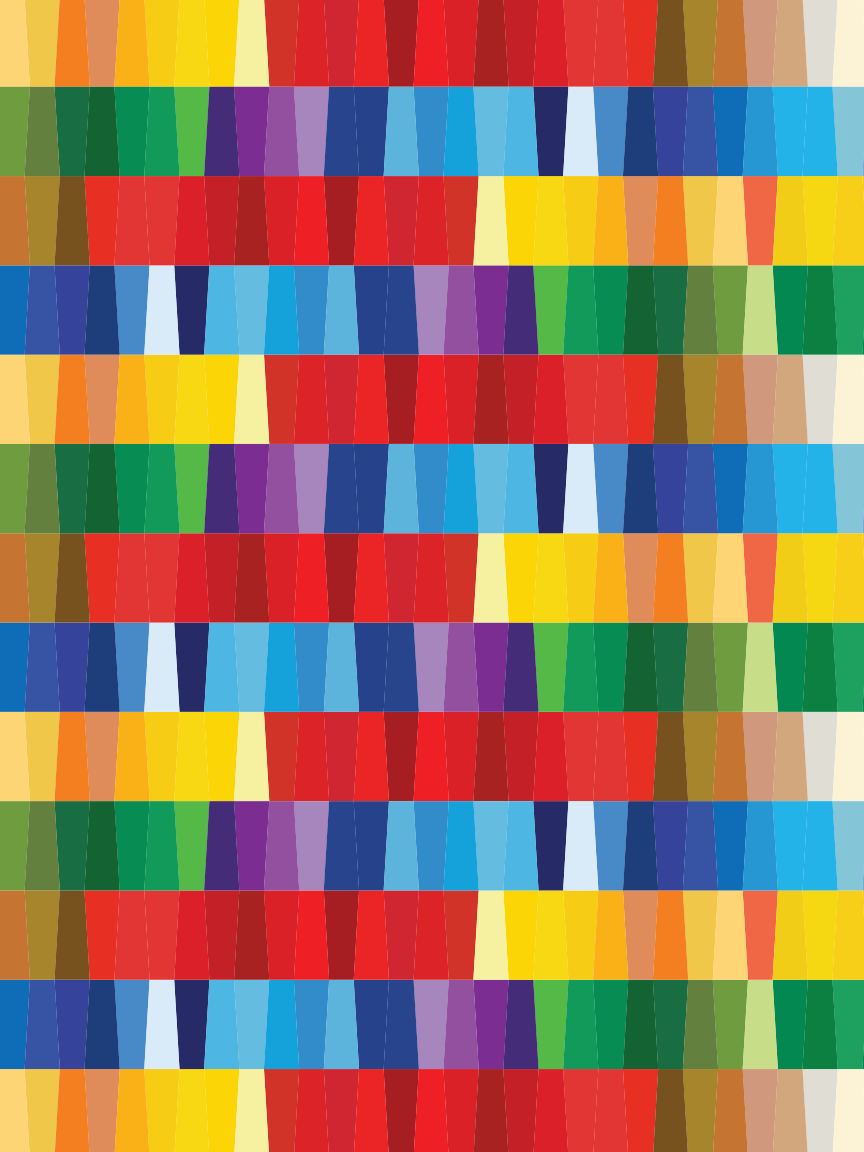


*Statewide Economic Impact
from the Oklahoma Indian
Gaming Association*

A Summary of the
2015 Annual Impact Report



\$1 BILLION

Revenues from Tribal Government Gaming to the State of Oklahoma have hit the \$1 billion mark this year in contributions toward education in Oklahoma. Those dollars have been directly deposited in the State's education accounts in the last ten years, and the deposits and total contributions will continue to grow.

The Oklahoma Indian Gaming Association and its membership have commissioned, and released the results of, the first-ever report, "Statewide Economic Impacts from Oklahoma Tribal Government Gaming," and the results are incredible.

This report is intended to be the first of many, which will be undertaken annually, and presented to the people of Oklahoma with pride.

Special thanks to the Steven C. Agee Economic Research and Policy Institute at Oklahoma City University and KlasRobinson Q.E.D., Inc. for their exceptional work on the report.

\$4

Tribal Government Gaming direct output was \$4.2 billion in 2014, representing 2.5 percent of private production in the Oklahoma Economy.

2.

Billion



Annual employee
benefits of almost
\$225 million including
healthcare, dental and
life insurance, as well
as retirement plans.

23,

277

Tribal Government Gaming Operations and related facilities supported 23,277 ongoing jobs in 2014, of which 83.2 percent were full-time positions.

In 2014, Oklahoma Tribal Government Gaming Operations and their employees paid out more than **\$264 million** in payroll related taxes, including almost \$30 million in income taxes to the State of Oklahoma.



\$91

A large, stylized orange number '0' is positioned in the upper left quadrant of the page. It is a thick, hollow ring.

Million

Annual wages, salaries and tips were almost \$910 million for the 23,277 ongoing jobs supported by Tribal Government Gaming Operations and related facilities.

More than 38.2 million visits to Tribal Government Gaming Operations and related hotel and ancillary facilities occurred in 2014, including more than 14.6 million out-of-state visits.

38.2

*Million
Visits*

\$ 1 B

Oklahoma Tribal Government
more than \$1 billion in Exclus

illion +

Gaming has paid the State
Activity Fees since 2006.

\$405

Million

In 2014 alone, the Oklahoma Tribal Government Gaming industry spent over \$405 million in capital expenditures and improvements, creating an estimated 2,883 jobs and earnings of almost \$155 million in the construction industry.

\$6

Induced and indirect impact on the economic output on the State of Oklahoma from both construction and operations is estimated to equal just over \$2 billion annually, giving a total economic impact of \$6.9 billion from annual operations and construction.

.9

Billion

42, 2



88

Jobs

Induced and indirect impact on employment in the State of Oklahoma from both construction and operations is estimated to equal 16,128 ongoing jobs, giving a total employment impact of 42,288 jobs from annual operations and construction.



Billion



2

Induced and indirect impact on earnings in the State of Oklahoma from construction and operations is estimated to equal more than \$724 million annually, giving a total earnings impact from annual operations and construction of \$2 billion.

BACKGROUND

Tribal Government Gaming in Oklahoma began several decades ago with simple bingo halls situated in retrofitted buildings. Today, 30 Tribal Nations in Oklahoma currently own 124 Tribal Government Gaming operations, including 19 casinos with hotels/resorts with a combined total of 4,700 rooms, and almost 425,000 square feet of meeting, function and entertainment space.

Other related ancillary facilities and amenities include almost 200 restaurants and bars, eight golf courses with a total of 108 holes, four spas, seven RV parks with nearly 375 sites, almost 50 gas and convenience stores as well as destination and convenience retail, several bowling centers, laser tag and a movie complex.

Oklahoma has the second largest Native American population in the United States, behind only California. According to the 2010 Census, 482,760 Oklahomans identified as Native American alone or in combination with other races.

KEY TERMS

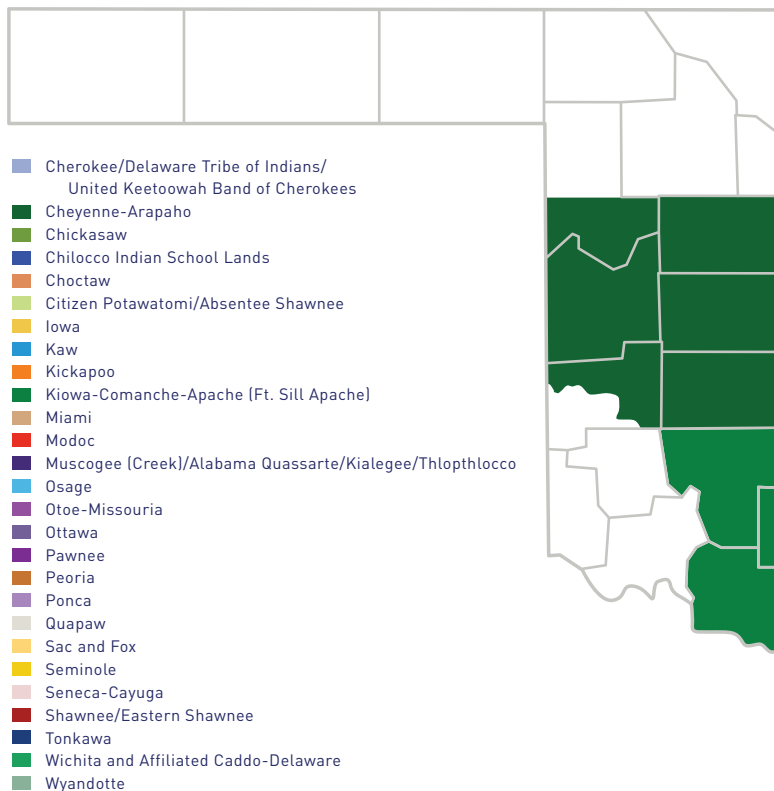
Direct impact

Direct impacts are changes in the industry in which the final demand change is made. In the case of Tribal Government Gaming in Oklahoma, direct impacts are those generated directly, including employment, wages, purchase of goods and services, as well as taxes or payments in lieu of taxes paid to the local, state and/or federal governments.

Multiplier impact

Estimates of indirect and induced impact were prepared using the IMPLAN (Impact Analysis for PLANing) economic model originally developed for the USDA Forest Service in cooperation with the Federal Emergency Management Agency and the USDI Bureau of Land Management.

TRIBAL JURISDICTIONS IN OKLAHOMA



2014-2015 OIGA TRIBAL MEMBER LIST

2014 – 2015 OIGA OFFICERS

Chairman

Brian Foster

Otoe Missouriia Tribe

Vice Chairman

David Qualls

Peoria Tribe

Secretary/Treasurer

Christian Fenner

Choctaw Nation of Oklahoma

OIGA Executive Delegates

At Large

Wes Pappan

Kaw Nation

Keith Enyart

Seneca-Cayuga Gaming

Commission

Executive Director

Sheila Morago

Gila River Indian Community

Absentee Shawnee Tribe of
Indians of Oklahoma

Apache Tribe of Oklahoma

Caddo Nation

Cherokee Nation of Oklahoma

Chickasaw Nation of Oklahoma

Choctaw Nation of Oklahoma

Citizen Potawatomi Nation

Comanche Nation of Oklahoma

Delaware Nation

Eastern Shawnee Tribe
of Oklahoma

Fort Sill Apache Tribe
of Oklahoma

Iowa Tribe of Oklahoma

Kaw Nation

Kiowa Tribe of Oklahoma

Miami Tribe of Oklahoma

Muscogee (Creek) Nation

Osage Nation

Otoe-Missouria Tribe of Indians

Ottawa Tribe of Oklahoma

Pawnee Nation of Oklahoma

Peoria Tribe of Indians
of Oklahoma

Quapaw Tribe of Oklahoma

Sac and Fox Nation of Oklahoma

Seminole Nation of Oklahoma

Seneca Cayuga Tribe of Oklahoma

Tonkawa Tribe of Oklahoma

Wichita and Affiliated Tribes

Wyandotte Nation

Content current as of October 1, 2015.



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