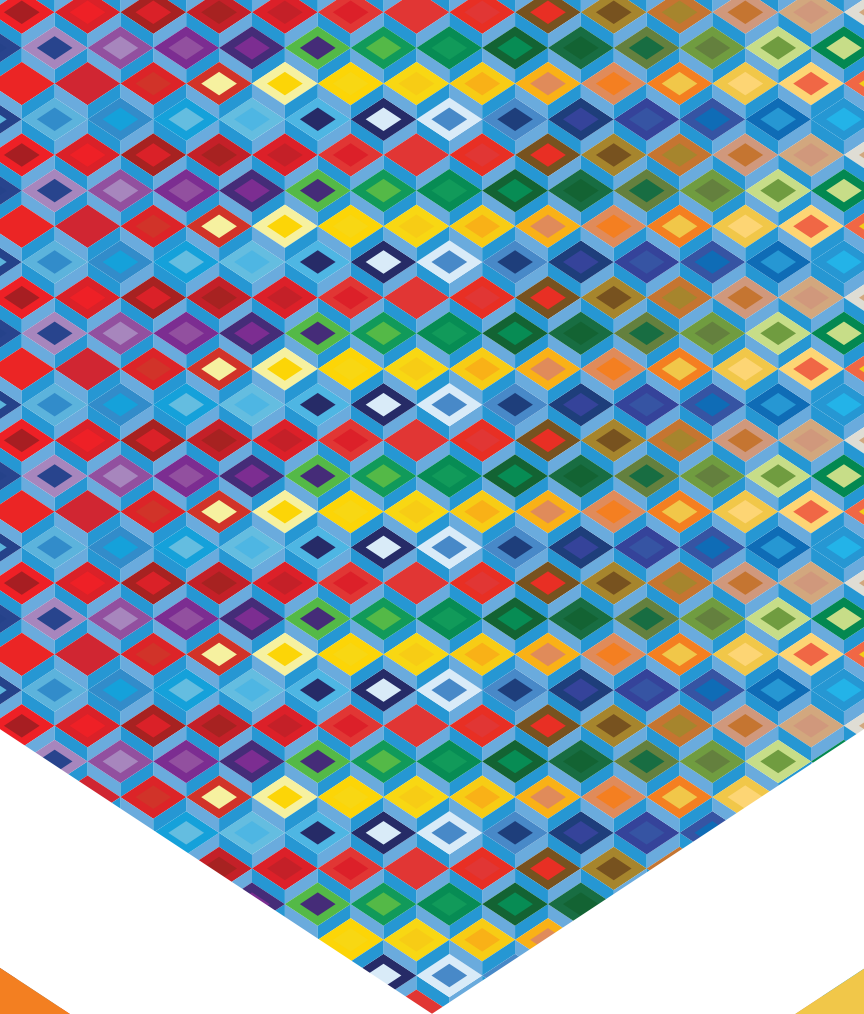




STATEWIDE ECONOMIC IMPACT

*from the Oklahoma Indian
Gaming Association*

A Summary of the 2016 Annual Impact Report



The following information is a summary of the findings and conclusions from the study entitled “*Statewide Economic Impacts from Oklahoma Tribal Government Gaming — 2016 Annual Impact*,” conducted and co-authored by the Oklahoma City University Center for Native American and Urban Studies and KlasRobinson Q.E.D. on behalf of Oklahoma Indian Gaming Association (OIGA).


This is the second in a series of Annual Economic Impact Reports. Its objective is to drill down and examine the local impacts of Tribal Government Gaming on urban and rural communities. The inaugural report, distributed in 2015, took a broad look at impacts generated for the State of Oklahoma by Tribal Government Gaming. Both full reports can be downloaded at OIGA.org.

Special thanks to the Tribal Governments whose participation in the intensive, year-long study has made these reports possible.

\$4.75

Billion

Tribal Government Gaming direct output was \$4.75 billion in 2015, representing 3 percent of private production in the Oklahoma economy.

The left side of the page features three overlapping, downward-sloping rectangular bars in shades of blue. The top bar is a medium blue, the middle bar is a darker blue, and the bottom bar is a light blue. They are positioned on the left side of the page, creating a modern, abstract graphic element.

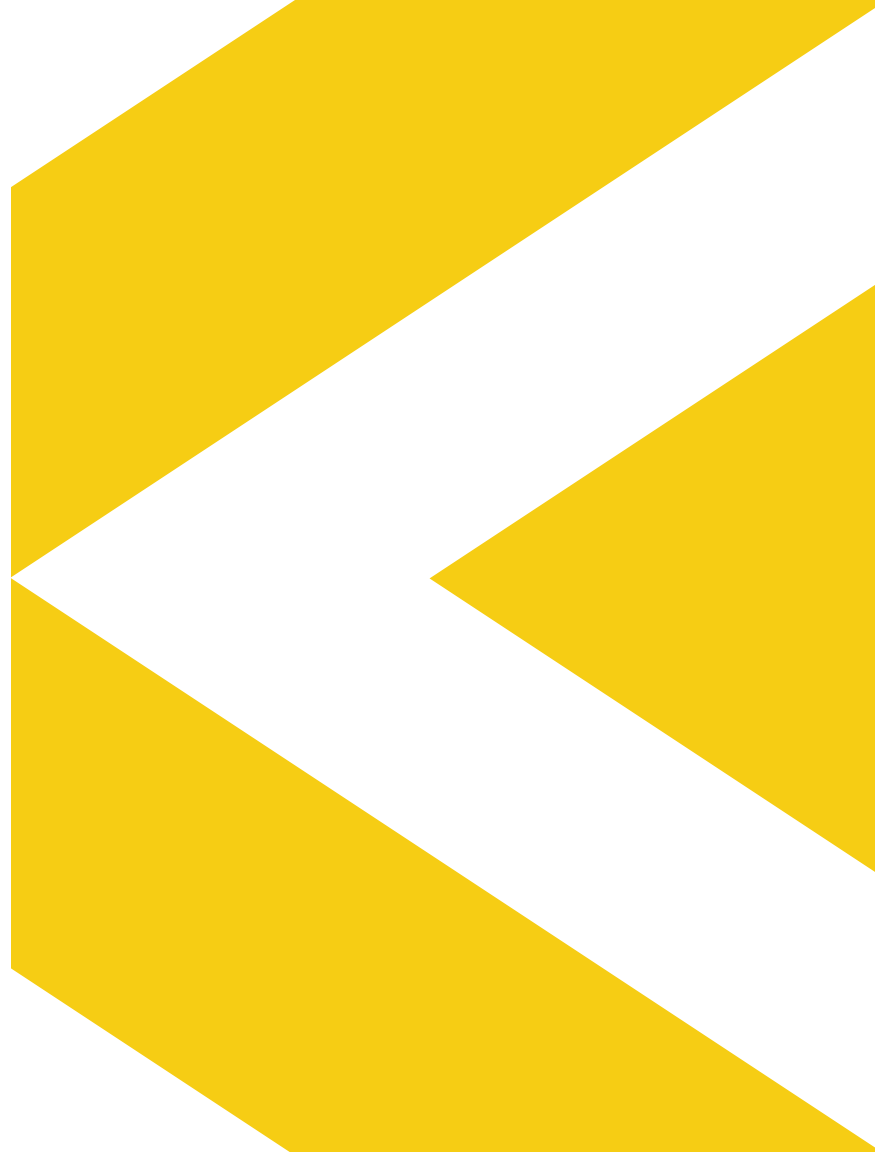
Annual employee
benefits of almost
\$320 million including
healthcare, dental
and life insurance,
and retirement plans.



27,944

Tribal Government Gaming Operations and Related Facilities supported 27,944 ongoing jobs in 2015, of which 76.6 percent were full-time. Rural Gaming Operations accounted for 18,470 or 66.1 percent of these jobs; urban Gaming facilities accounted for 9,474 jobs, or 33.9 percent.

In 2015, Oklahoma Tribal Government Gaming Operations and their employees paid out almost **\$325 million** in payroll-related taxes, including \$33 million in income taxes to the State of Oklahoma.



*\$1.05
Billion*

Annual wages, salaries and tips of almost
\$1.05 billion in 2015.

Almost 45.9 million visits to Oklahoma Tribal Government Gaming Operations occurred in 2015, including 18.7 million from out of state. Rural gaming facilities account for 29.3 million visits, or 63.9 percent, which includes almost 84 percent of total out-of-state visits.

45.9
*Million
Visits*

\$1.123

Billion

Oklahoma Tribal Governments have paid the State a total of \$1.123 billion in Exclusivity Fees since 2006.



*\$363
Million*

In 2015 alone, Oklahoma Tribal Government Gaming Operations spent \$363 million on capital improvements, creating an estimated 2,768 jobs and earnings of almost \$124 million in the construction industry.

\$7.2

.2

Billion

Induced and indirect impact on the economic output on the State of Oklahoma from both construction and operations is estimated to equal just over \$2.2 billion annually, giving a total economic impact of \$7.2 billion from annual operations and construction. Of that, 60 percent occurred in rural areas.



48,

942

Jobs

Induced and indirect impact on employment in the State of Oklahoma, from both construction and operations, is estimated to equal 17,050 on-going jobs, giving a total employment impact of 48,942 jobs from annual operations and construction. Of this, 64 percent occurred in rural areas.

\$2.3

Billion

Induced and indirect impact on earnings in the State of Oklahoma from construction and operations is estimated to equal more than \$713 million annually, giving a total earnings impact from annual operations and construction of \$2.3 billion, of which 64 percent occurred in rural areas.

BACKGROUND

Tribal Government Gaming in Oklahoma began several decades ago with simple bingo halls situated in retrofitted buildings. Today, 31 Tribal Nations in Oklahoma currently operate almost 130 with approximately 72,850 electronic games, almost 5,300 bingo seats and other games. Tribal Government Gaming operations include 20 casinos with hotels/resorts with a combined total of more than 5,000 rooms, and almost 500,000 square feet of meeting, function and entertainment space.

Other related ancillary facilities and amenities include almost 200 restaurants and bars, nine golf courses with a total of 126 holes, five spas, seven RV parks with nearly 375 sites, more than 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

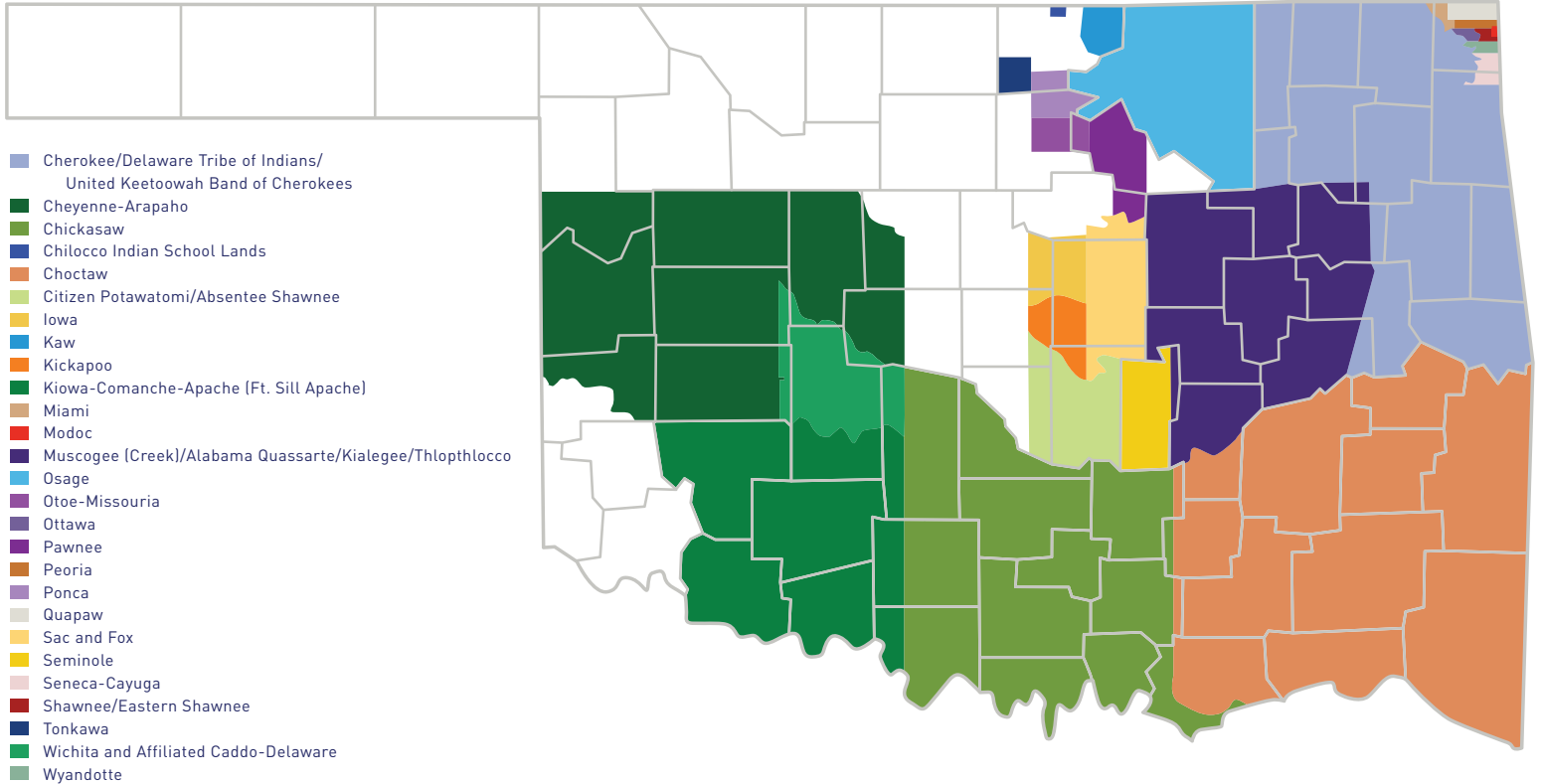
Direct impact

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



**2015 – 2016
OIGA OFFICERS**

Chairman

Brian Foster

Otoe-Missouria Tribe of Indians

Vice Chairman

David Qualls

Peoria Tribe of Indians of Oklahoma

OIGA Secretary/Treasurer

Christian Fenner

Choctaw Nation of Oklahoma

OIGA Executive Delegates

At Large

Wes Pappan

The Kaw Nation

Keith Enyart

Seneca-Cayuga Tribe of Oklahoma

Executive Director

Sheila Morago

Gila River Indian Community

**2015–2016 OIGA
TRIBAL MEMBER LIST**

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 19, 2016.



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