A Summary of the 2016 Annual Impact Report

from the Oklahoma Indian Gaming Association

STATEWIDE ECONOMIC IMPACT
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.
Tribal Government Gaming direct output was $4.75 billion in 2015, representing 3 percent of private production in the Oklahoma economy.
Annual employee benefits of almost $320 million including healthcare, dental and life insurance, and retirement plans.
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.
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.
Oklahoma Tribal Governments have paid the State a total of $1.123 billion in Exclusivity Fees since 2006.
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.
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.
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.
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.
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