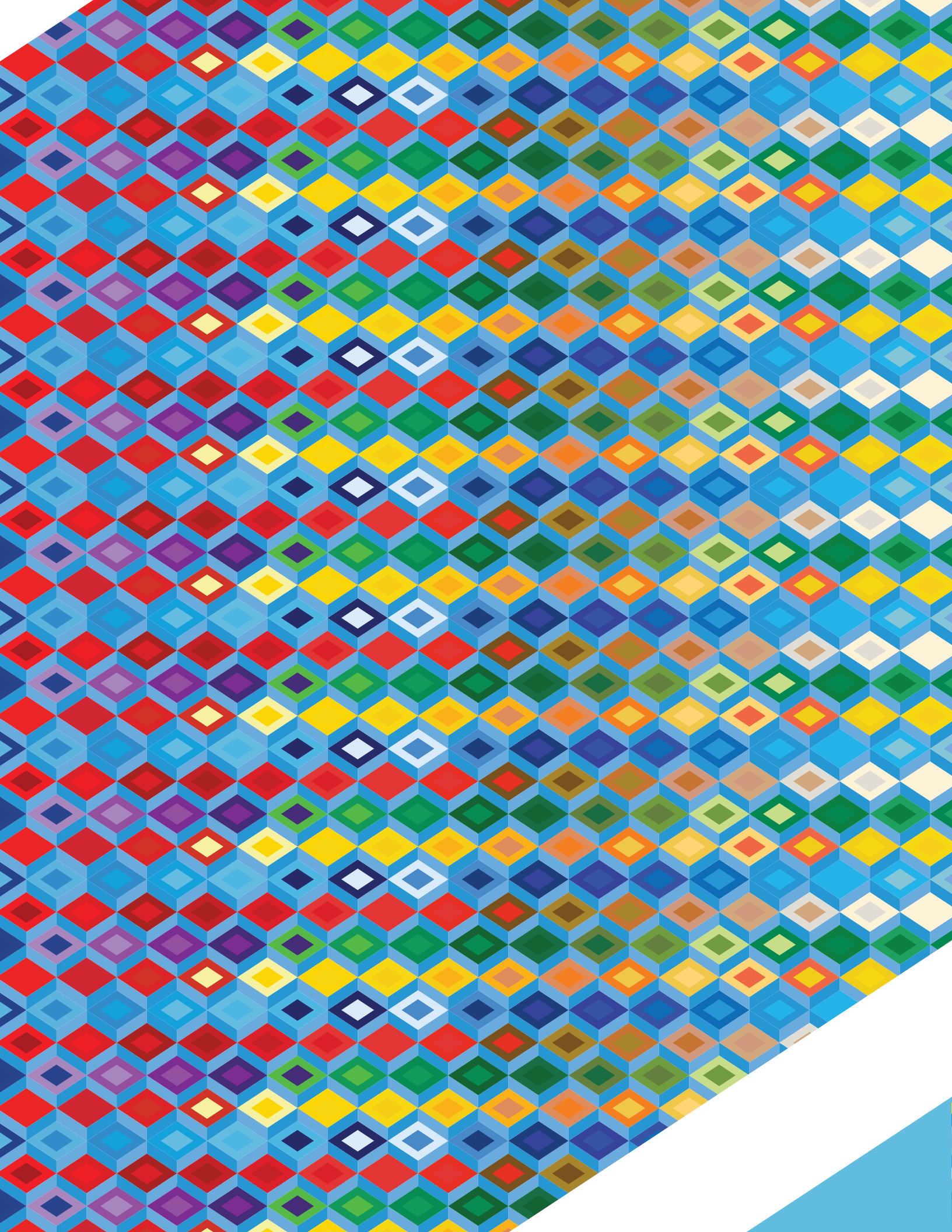


2016 ANNUAL IMPACT

*Statewide Economic Impacts
from Oklahoma Tribal Government Gaming*

October 19, 2016





Contents

<i>Executive Summary</i>	4
<i>Background</i>	6
<i>Introduction</i>	8
<i>Economic Impacts</i>	9
METHODOLOGY	9
DIRECT IMPACT	10
MULTIPLIER IMPACT	10
Revenues	11
Output	11
Exclusivity Fees	12
Urban vs. Rural	13
DIRECT IMPACT	18
Employment	18
Wages and Benefits	20
Payroll and Related Taxes	21
Visitation	22
MULTIPLIER AND TOTAL IMPACT	23
Impact from Operations	24
Annual Capital Expenditures	28
 <i>Oklahoma Indian Casinos by Tribe and Location</i>	 34
 <i>Map of Oklahoma Indian Casinos</i>	 36
 <i>Center for Native American and Urban Studies</i>	 37
 <i>KlasRobinson Q.E.D.</i>	 38



Executive Summary

The following section presents 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).

DIRECT IMPACT

- Oklahoma Tribal Government Gaming output was **\$4.75 billion** in 2015, representing 3 percent of private production in the Oklahoma economy.
- Oklahoma Tribes have paid the State a total of **\$1.123 billion in Exclusivity Fees** since 2006.

Oklahoma Tribal Government Gaming output was **\$4.75 billion** in 2015.

- Tribal Government Gaming Operations and Related Facilities supported 27,944 ongoing jobs in 2015 of which 76.6 percent were full-time positions. 18,470 of these jobs (66.1 percent) were located at Indian casinos in rural counties while 9,474 of these jobs (33.9 percent) were located at Indian casinos in urban counties in Oklahoma.
- Annual wages, salaries, and tips of almost **\$1.05 billion** in 2015
- Annual employee benefits of almost **\$320 million** including healthcare, dental, life insurance, and retirement plans
- In 2015, Oklahoma Tribal Gaming Operations and their employees paid almost **\$325 million in payroll related taxes** including more than **\$33 million in income taxes to the State of Oklahoma**.
- Oklahoma Tribal Gaming Operations had almost **45.9 million visits** in 2015, including more than **18.7 million visits from out of state**. In 2015, **rural Tribal Government casinos in Oklahoma** accounted for **29.3 million visits** (63.9 percent of total visits) including over **15.7 million visits from out of state** (almost 84.0 percent of total out-of-state visits).
- In 2015 alone, Oklahoma Tribal Gaming Operations spent **\$534 million on capital improvements**, creating an estimated **3,948 jobs** and **earnings of almost \$193 million** in the construction industry.

MULTIPLIER AND TOTAL IMPACT

- 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 which **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 ongoing jobs**, giving a **total employment impact of 48,942 jobs** from annual operations and construction, of which **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**.

SOURCE: Oklahoma City University Center for Native American and Urban Studies and KlasRobinson Q.E.D.



\$7.2 *Billion*

Total economic impact from annual operations and construction

Background

Tribal Government Gaming in Oklahoma began several decades ago with simple bingo halls situated in retrofitted buildings including gymnasiums, community centers, double-wide trailers, and even Quonset huts located on Tribal lands.

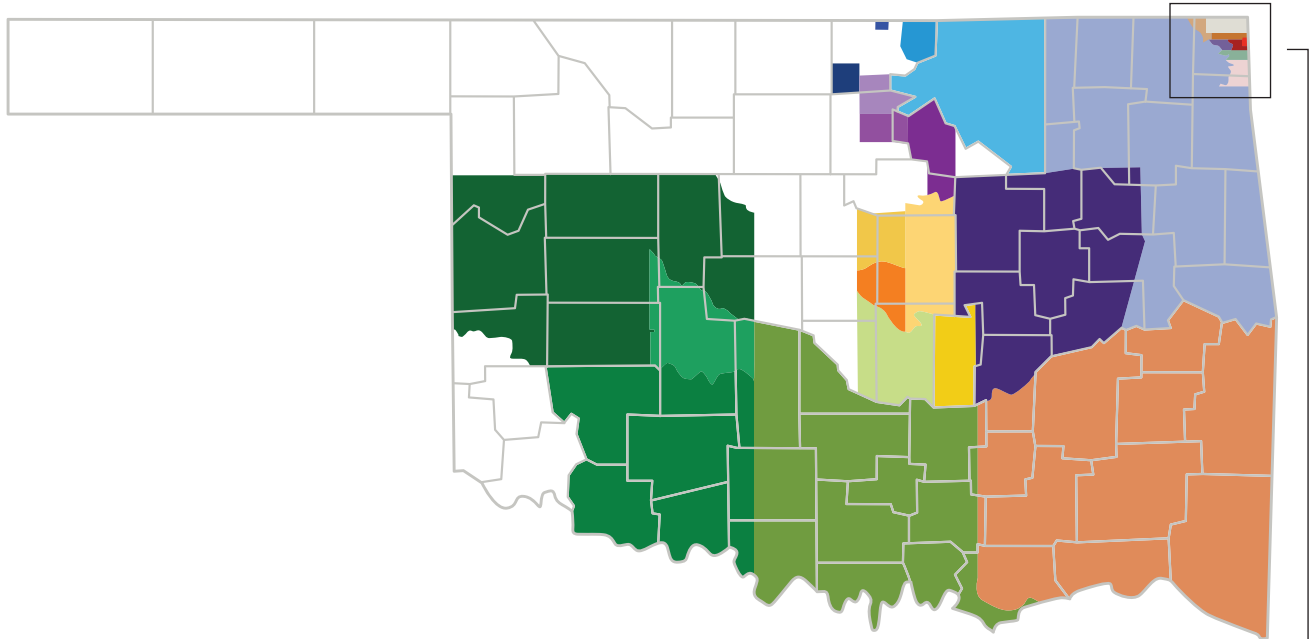
Thirty-one Tribes in Oklahoma currently operate almost 130 Indian gaming operations with approximately 72,850 electronic games, almost 5,300 bingo seats and other games.

Pursuant to Congressional authorization, today 31 Tribes in Oklahoma currently operate almost 130 gaming operations with approximately 72,850 electronic games, almost 5,300 bingo seats, and other games. There are 20 Tribal Gaming Operations with hotels/resorts in Oklahoma with a combined total of more than 5,000 rooms and almost 500,000 square feet of meeting, function, and entertainment space.

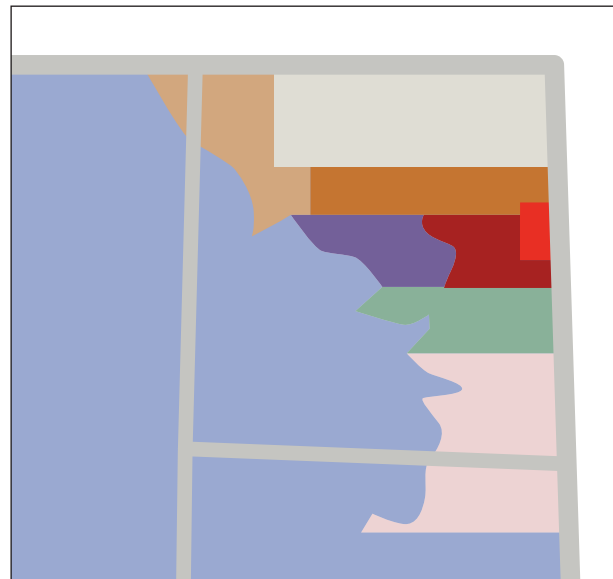
Other related ancillary facilities and amenities include almost 200 restaurants and bars, nine golf courses with a total of 126 holes, five spas, seven RV parks with almost 375 sites, and more than 50 gas station/convenience stores, as well as destination and convenience retail, several bowling centers, 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. Oklahoma Native Americans do not live on traditional reservations as in other states; rather, they live throughout the State with Tribal Government Operations and Services limited to jurisdictional areas. Due to Federal government requirements that casinos operate on Indian Land, existing casinos are located in or near longstanding Federally Recognized Tribal Jurisdiction Areas. As shown in the map on the next page, Tribal Jurisdiction Areas belonging to the 38 Federally-Recognized Oklahoma Tribes cover most of the State except for the northwest quadrant. With no Tribal jurisdiction in the northwest, there are currently no Tribal Gaming Operations in this area.

Federally Recognized Tribes in Oklahoma



- Cherokee
- Cheyenne-Arapaho
- Chickasaw
- Chilocco Indian School Lands
- Choctaw
- Citizen Potawatomi/Absentee Shawnee
- Delaware Tribe of Indians
- Iowa
- Kaw
- Kickapoo
- Kiowa-Comanche-Apache (Ft. Sill Apache)
- Miami
- Modoc
- Muscogee (Creek)/Alabama Quassarte/Kialegee/Thlopthlocco
- Osage
- Otoe-Missouria
- Ottawa
- Pawnee
- Peoria
- Ponca
- Quapaw
- Sac and Fox
- Seminole
- Seneca-Cayuga
- Shawnee/Eastern Shawnee
- Tonkawa
- United Keetoowah Band of Cherokees
- Wichita and Affiliated Caddo-Delaware
- Wyandotte



SOURCE: Oklahoma Department of Transportation

Introduction

The citizens of the State of Oklahoma passed the Oklahoma State Tribal Gaming Act in 2004, establishing a pre-approved gaming compact model for Federally-recognized Tribes.

The compact covers one-time startup costs and monthly exclusivity payments from the operating Tribes to the State. Additionally, the compact defines the audit and regulatory framework for operation in conjunction with the National Indian Gaming Commission (NIGC) and in compliance with the Indian Gaming Regulatory Act (IGRA).

Since inception, Oklahoma Tribal Governments have paid more than \$1.123 billion in exclusivity fees to the State. Total construction cost for the existing gaming, hotel, and related ancillary facilities since inception is estimated to equal over \$3.6 billion since the beginning of Tribal Government Gaming in Oklahoma.

While the exclusivity payments are well known to state authorities, the annual impacts resulting from ongoing Tribal Government Gaming are not. This report seeks to quantify the annual production, employment, and payroll impacts of Tribal Government Gaming in Oklahoma. The study methodology is discussed in the next section, followed by a detailed account of the direct and multiplier impacts from Tribal Government Gaming Operations and Construction in 2015.

Since inception, Oklahoma Tribal Governments have paid more than \$1.123 billion in exclusivity fees to the State of Oklahoma.

Economic Impacts

METHODOLOGY

Economic impacts are estimates of the full production, employment, and income that are directly and indirectly linked to the production activity under study. The true impacts are unknowable, as the variety and quantity of expenditures flowing downstream from the initial production activity are not specifically reported. However, “good” estimates can be obtained by using existing economic linkages developed from previous industry flows. These previous annual dollar flows are used to construct a model that calculates the downstream expenditures that result from direct expenditures by Tribal Government gaming activities. The downstream expenditures include production by related industries and household expenditures due to increased income. When totaled, these direct (gaming and construction), indirect (downstream industries), and induced (household) expenditures provide a complete picture of the total impact. Thus, the total impacts include the initial expenditures by the gaming industry and the subsequent multiplier impacts resulting from indirect and induced expenditures.¹

Local economic impacts derived from gaming operations arise from both the construction and the ongoing annual operation of gaming facilities. Construction impacts are transient, occurring only during initial construction or subsequent building maintenance or expansion, while operations impacts occur annually over the life of a facility. Impacts from each are detailed on the following pages.

¹ Impacts were calculated using multipliers created by IMPLAN Software, Implan Group, LLC, 16740 Birkdale Commons Parkway, Suite 206, Huntersville, NC 28078.

DIRECT IMPACT

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

The primary source material for this study was derived from survey responses from OIGA Member Tribes for the year ending 2015. With an overwhelming response rate of more than 80 percent of Tribal Gaming Operations, the survey provided a comprehensive snapshot of employment, payroll, revenues, and expenditures associated with Tribal Government Gaming and ancillary operations in the State. Using the survey as the baseline and information from other government sources, we estimated the direct impact of all Tribal Gaming Operations within the State. Gaming information pertaining to unemployment, industry output, and similar matters was obtained through published information from various government agencies.

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.

The IMPLAN model was developed at the University of Minnesota and is maintained by IMPLAN Group LLC in Huntersville, North Carolina. The IMPLAN model has been in use since 1979. The IMPLAN model accounts closely follow the accounting conventions used in the “Input-Output Study of the U.S. Economy” by the Bureau of Economic Analysis and the rectangular format recommended by the United Nations.

**Tribal gaming's
direct impact
represented 3
percent of private
production in the
2015 Oklahoma
economy.**

Revenues

According to the National Indian Gaming Commission (NIGC), Tribal Government Gaming revenues were up sharply in Oklahoma during 2015. Nationally, revenues increased by 5.0 percent while the Oklahoma City Region, which encompasses western Oklahoma, exhibited the second largest increase of any of the regions at 6.7 percent.² The Tulsa Region, which includes the eastern portion of the State, grew by 6.5 percent, the third largest increase of any of the regions.

Using the Oklahoma Tribal Survey data and the NIGC revenue release, we estimate that Oklahoma revenues were \$4.75 billion in 2015.

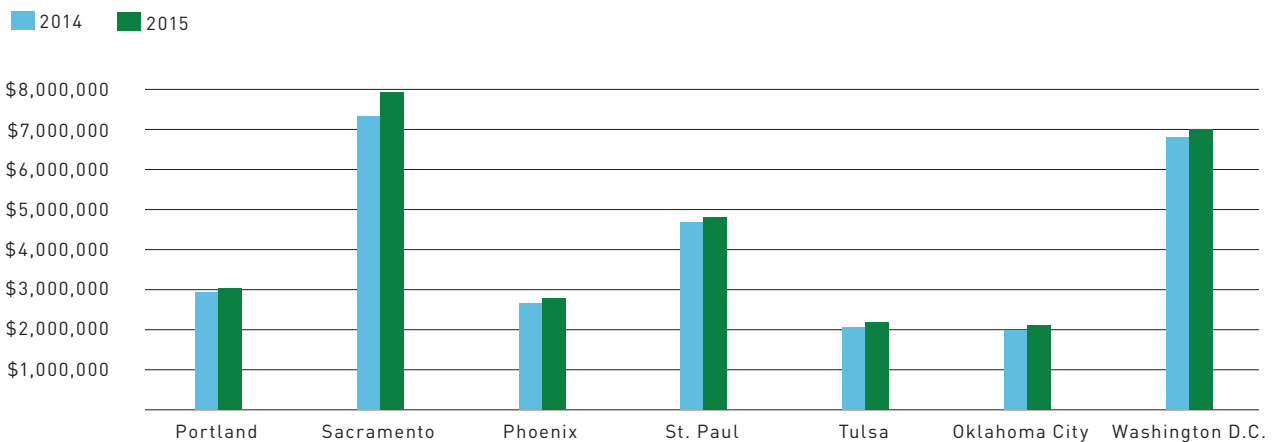
Output

Direct production, or output, from Tribal Government Gaming is derived from reported or estimated revenues less the wholesale value of goods sold in retail outlets. We estimate that Tribal gaming output was \$4.5 billion in 2015. This direct impact represented 3 percent of private production in the 2015 Oklahoma economy.³

² According to NIGC, the OK City region includes Western Oklahoma and Texas and the Tulsa Region includes Eastern Oklahoma and Kansas.

³ Oklahoma Private Industry GDP in current dollars was \$151.8 billion in 2015. See *BEA.gov* for more information.

Tribal Government Gaming Revenues 2014–2015



Source: National Indian Gaming Commission

Exclusivity Fees

Oklahoma has 33 Tribes with gaming compacts. Per the terms of the State-Tribal Gaming Compacts, Compacted Tribes pay a monthly exclusivity fee to the State of Oklahoma for the exclusive right to operate Compacted Gaming. The fees are calculated as follows:

Electronic Covered Games:

- 4 percent of the 1st \$10,000,000 of annual Adjusted Gross Revenues (AGR),
- 5 percent of the next \$10,000,000 of AGR, and
- 6 percent of AGR over \$20,000,000

Non-House Banked Games:

- 10 percent of the Monthly Net Win

Oklahoma Tribes have paid the State \$1.123 billion in total exclusivity fees. The table (right) presents annual payments since 2006.

By statute, exclusivity fees go to the Education Reform Revolving Fund (HB 1017 Fund), the General Revenue Fund, and the Department of Mental Health and Substance Abuse Services (ODMHSAS). According to the Oklahoma Gaming Compliance Unit, ODMHSAS receives \$250,000 annually, with 88 percent of the remaining fees going to the 1017 Fund and 12 percent to the General Revenue Fund.⁴

⁴ "Oklahoma Gaming Compliance Unit Annual Report, Fiscal Year 2015," Office of Management and Enterprise Services.

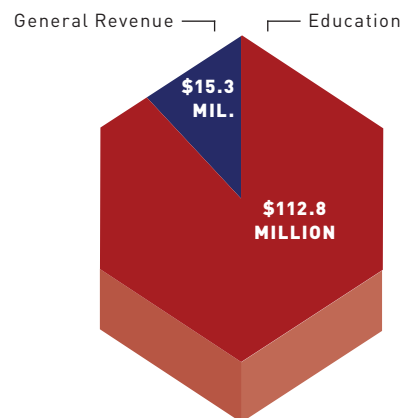
Exclusivity Fees Paid by Oklahoma Tribes

Fiscal Year*	Total Exclusivity Fees
2016	\$132,035,000
2015	\$128,378,000
2014	\$122,622,000
2013	\$128,098,000
2012	\$123,872,000
2011	\$122,238,000
2010	\$118,214,000
2009	\$105,587,000
2008	\$81,424,000
2007	\$46,824,000
2006	\$14,234,000
Total	\$1,123,526,000

* Fiscal Year ending June 30th

Source: Oklahoma Gaming Compliance Unit Annual Report Fiscal Year 2016

Where the Money Goes



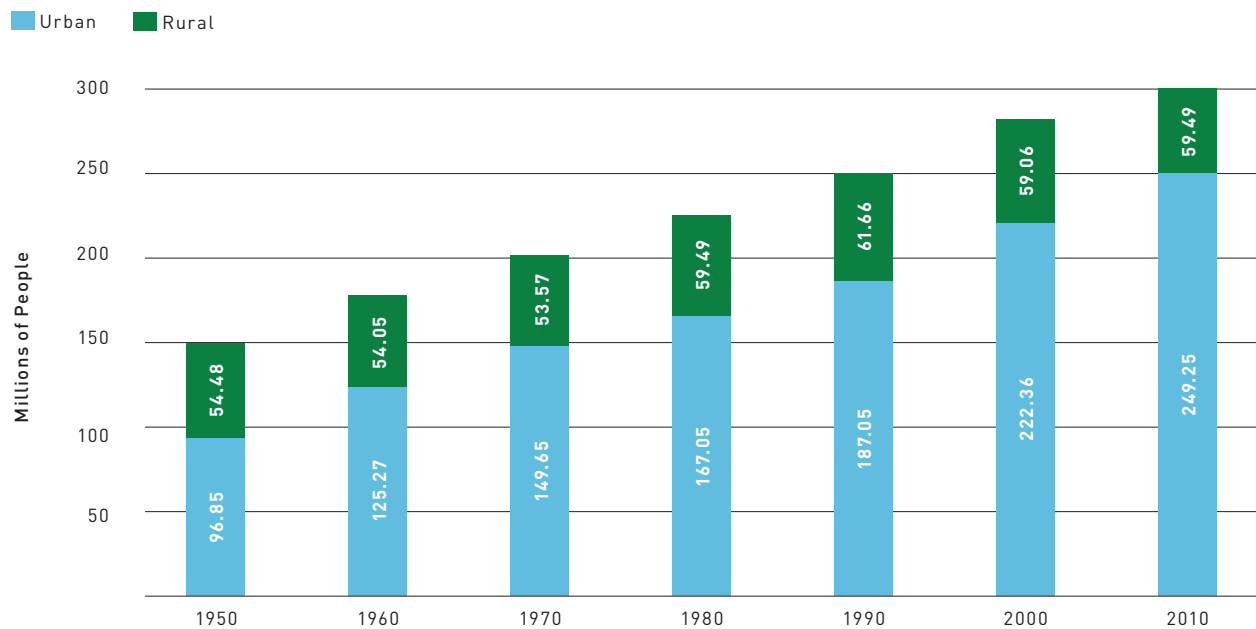
Urban vs. Rural

Within a region there are distinct geographies that define the nature and extent of economic linkages. Cities arise due to their inherent productivity advantages stemming from the linkages to supporting activities and the knowledge transfers that occur between competing and complementing industries. For centuries, rural areas existed to provide agricultural products for consumption and trade, requiring significant labor. With changes in technology and transportation costs, rural areas that once thrived have been declining in

population for many decades while cities have continued to flourish as the primary source of regional and national growth. Nationally, rural areas made up 94.9 percent of the population in 1790. That number had declined to 36 percent by 1950, and by 2010, the rural share of the U.S. population fell to 19.3 percent.⁵ U.S. urban, rural and total population counts from 1950–2010 are provided in the chart below. Note that the rural population count peaked at 61.66 million in 1990 while the urban count has increased in every decennial census.

⁵ www.census.gov

Urban and Rural Population in the United States: 1950–2010



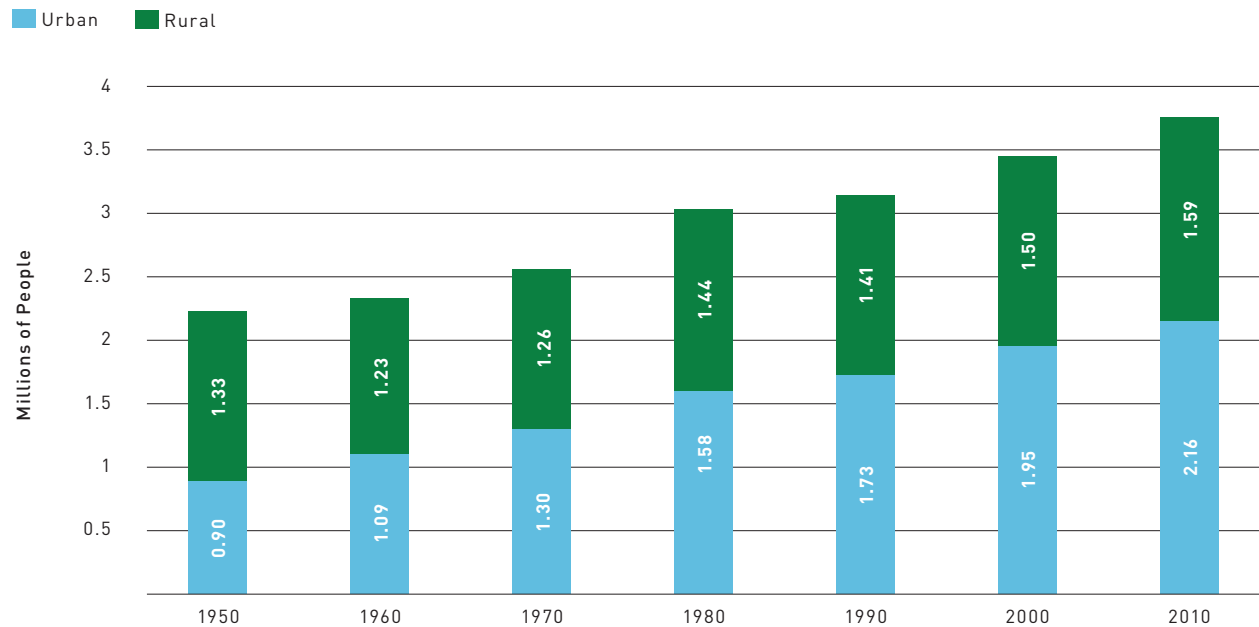
Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Oklahoma has a similar urbanization story. The data in the chart below reflects the urban/rural distinction of OKC and Tulsa MSAs vs. all other counties in Oklahoma.⁶ In 1950, nearly 60 percent of Oklahomans lived outside the Oklahoma City and Tulsa MSAs. By 2010, the population distribution had flipped as 58 percent of the population resided within these two MSAs.⁷ By 2015 (not pictured), the population share in OKC and Tulsa had grown to 60 percent.

⁶ Oklahoma actually contains all or a portion of four MSAs: Oklahoma City, Tulsa, Lawton and Ft. Smith, Arkansas. For the purposes of this report, we have included counties within the Lawton and Ft. Smith MSAs in the Rural classification, as their population changes more closely align with the rural areas in the state.

⁷ According to the US Census Bureau, Oklahoma Urban citizens comprised 66.2 percent of the population. This includes all urban areas as defined by the Census Bureau and is a comparable number to the 2010 US Urban percentage of 80.7 percent.

Oklahoma Urban and Rural Populations: 1950–2010



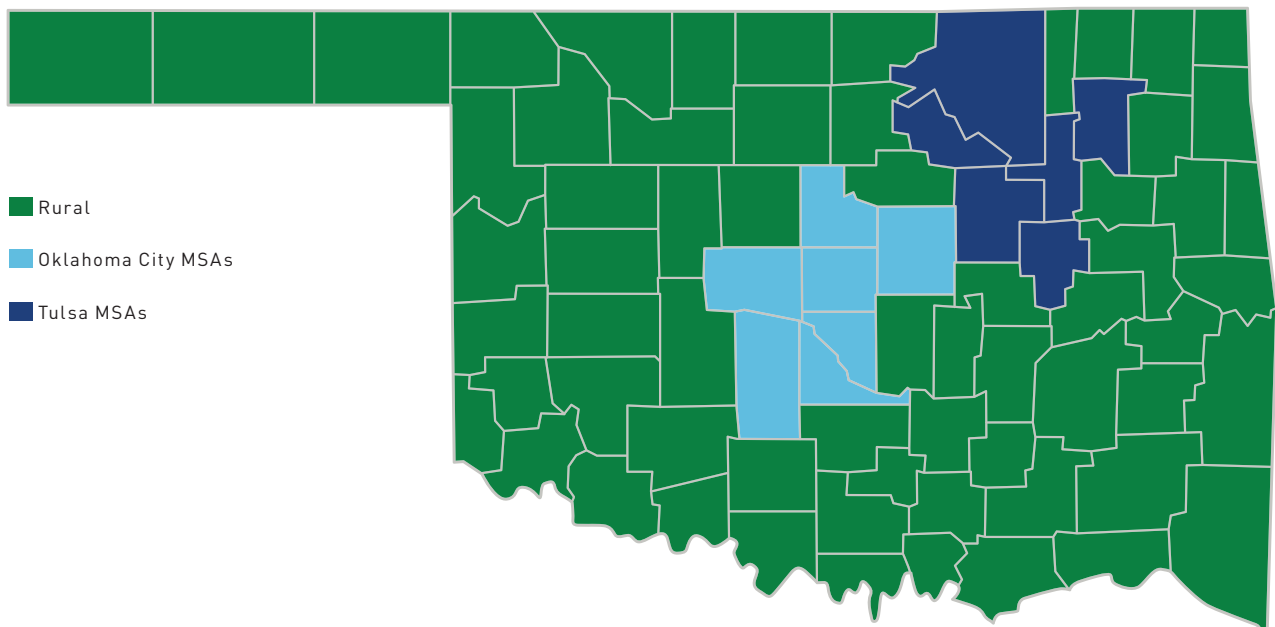
Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

The definition of “urban” is difficult to discern. The U.S. Census Bureau has dealt with this problem for decades, changing its definition over time. Currently, it has two urban designations: Urbanized Areas (UAs) of 50,000 people or more and Urban Clusters (UCs) of at least 2,500 people but less than 50,000.⁸ Urban economists have typically defined urban based upon a specific issue they wish to address. For example, it doesn’t make much sense to include a town of 2,500 when discussing inner city crime or urban and suburban economic development. Large cities and small towns require different prescriptions for most issues identified as urban.

For this study, we are concerned primarily with the differential impact that Tribes have on the two largest urban areas in Oklahoma, the 14 counties that make up the Tulsa and Oklahoma City MSAs, and separately, all other counties (rural). There are actually four MSAs in Oklahoma: Lawton, Oklahoma City, Tulsa, and a part of the Ft. Smith, Arkansas MSA covering LeFlore and Sequoyah Counties. However, the counties in the Lawton and Oklahoma portion of the Ft. Smith MSA more closely resemble population trends of rural counties within the state, so the Tribal impact in these areas aligns more closely with rural instead of urban regions.

⁸ For a complete definition, see “2010 Census Urban and Rural Classification and Urban Area Criteria,” www.census.gov.

Oklahoma City and Tulsa MSAs



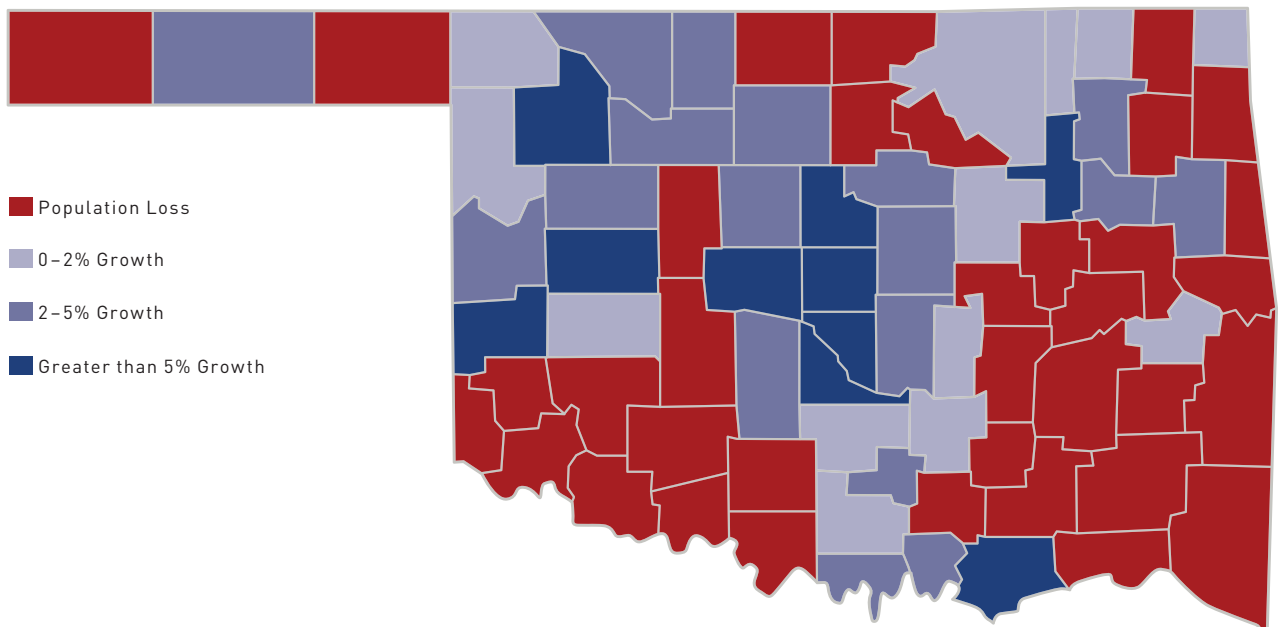
Source: www.census.gov, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

The decline of rural populations is striking, but not surprising.

In Oklahoma, as in the U.S., the population in rural areas has stagnated, and in many counties declined over time. As of 2015, the rural Oklahoma population was down 1.01 percent from 2010, the urban population was up 6.59 percent,⁹ and the total statewide population was up 4.26 percent. During this period, there was growth in rural areas in the western part of the state, largely due to increased oil and gas production. However, rural areas in the other parts of the state continued to decline.

⁹ www.census.gov

Oklahoma Population Change: 2010–2015

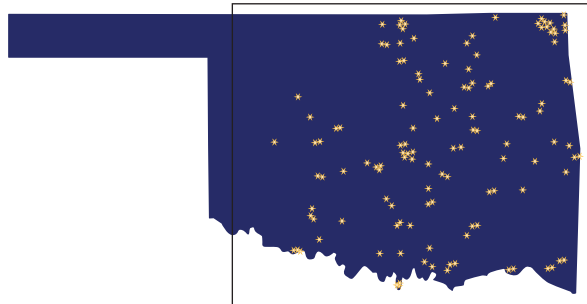


Source: www.census.gov, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

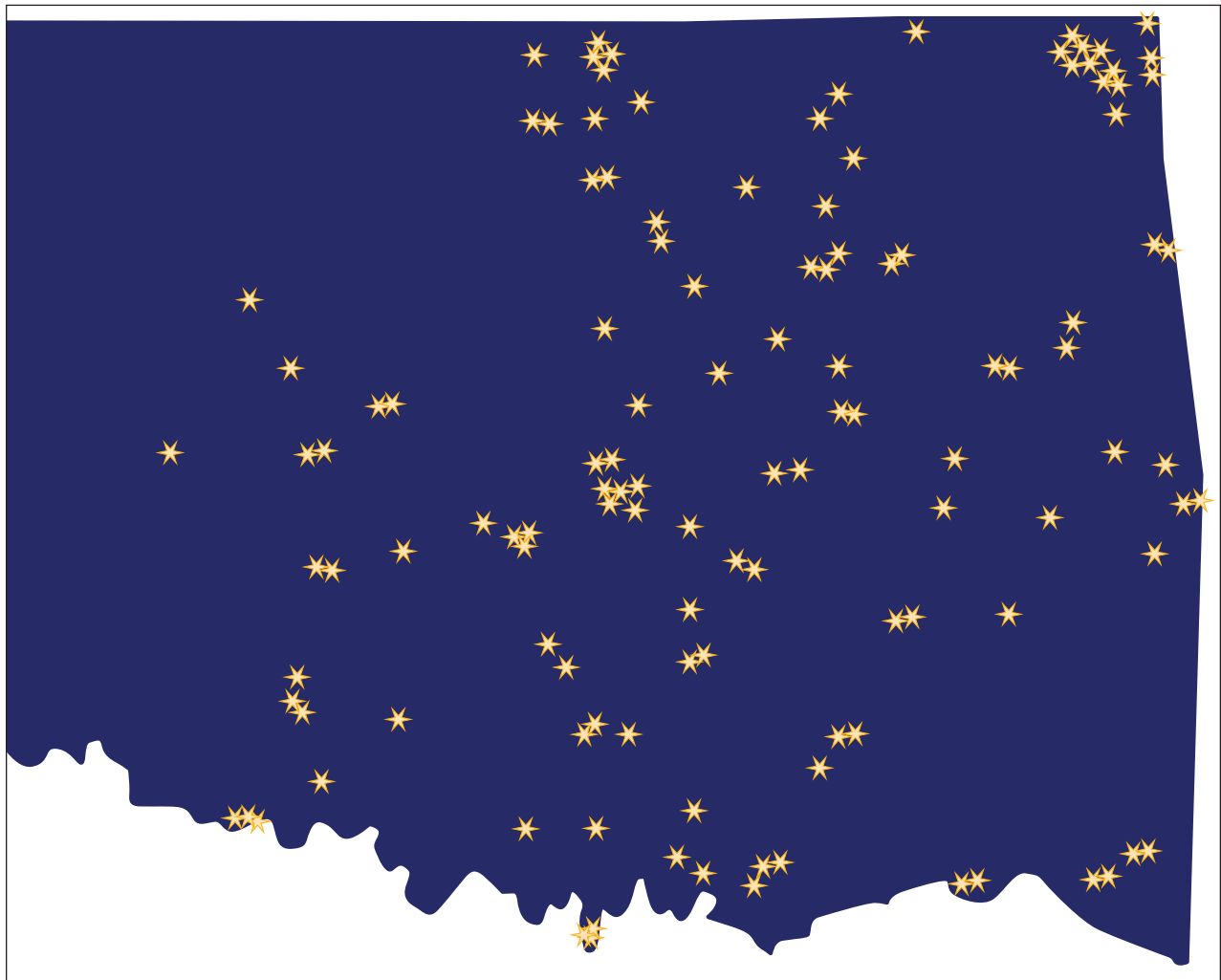
The decline of rural populations is striking, but not surprising. Migration to urban areas is a natural occurrence as workers relocate for jobs and higher wages. For rural communities to survive, households need access to employment opportunities, which with the consolidation of agricultural production are generally in decline in rural areas.

With the growth of gaming and the rural location of Oklahoma casinos, Tribes can be a needed source of sustained employment opportunities

within these rural areas. The map below highlights the current casino locations in the state. While there are some casinos in urban areas, the majority exist in the rural areas in largely declining counties.



Oklahoma Tribal Government Casinos



DIRECT IMPACT

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

Employment

As presented in the following table, during 2015 Oklahoma Indian casinos, along with their hotels and related ancillary facilities, had an annual average employment of 27,944. Of these employees, 76.6 percent were full-time, 55.8 percent of employees were women and 43.2 percent of employees were Native American including 22.3 percent of Tribal employees working for their respective Tribes.

2015 Average Annual Employment

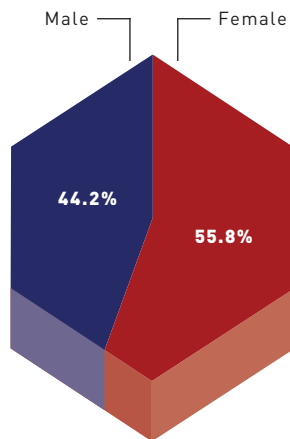
STATUS	Total		Rural		Urban	
Full Time	21,413	76.6%	13,423	72.7%	7,990	84.3%
Part Time	6,531	23.4%	5,047	27.3%	1,484	15.7%
Total	27,944	100.0%	18,470	66.1%	9,474	33.9%

GENDER	Total		Rural		Urban	
Male		44.2%		44.0%		44.8%
Female		55.8%		56.0%		55.2%

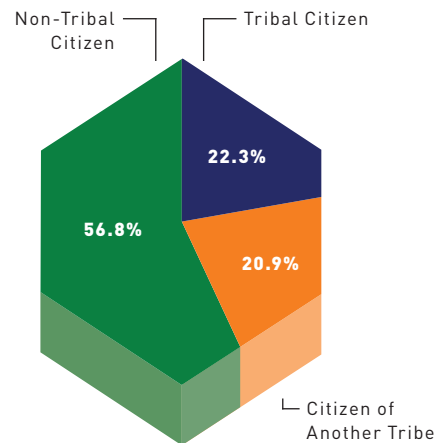
ETHNICITY	Total		Rural		Urban	
Tribal Citizen		22.3%		11.8%		32.4%
Other Tribe		20.9%		19.5%		13.9%
Non-Tribal		56.8%		44.8%		53.7%

Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

2015 Employment by Gender



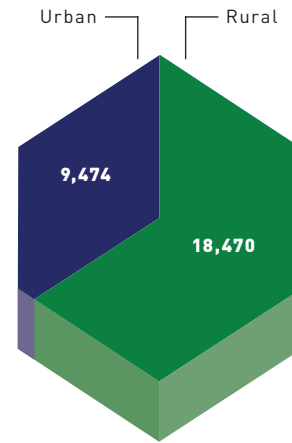
2015 Employment by Ethnicity



Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

An estimated 18,470 of Tribal gaming employees—more than 66 percent of total employees—worked at rural gaming facilities, while an estimated 9,474 of Indian gaming employees—almost 34 percent of total employees—worked at urban gaming facilities. At the same time, there is a greater percentage of full-time employees working at urban Tribal casinos in Oklahoma.

2015 Rural vs. Urban Employment



Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

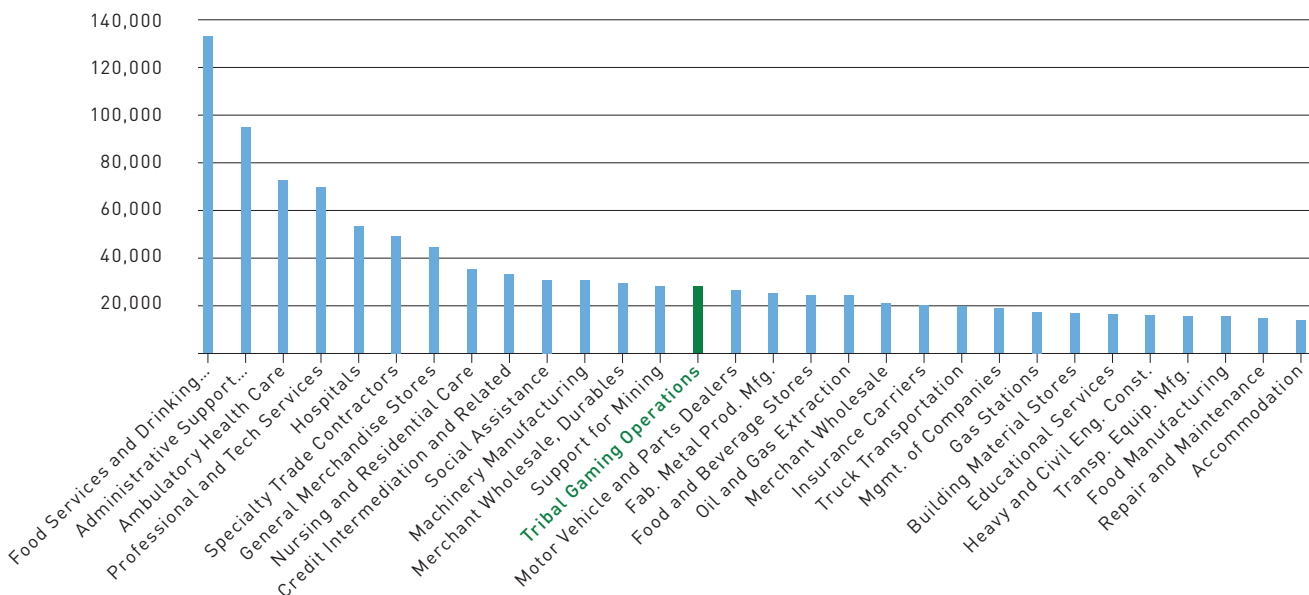
Private employment provided 1.32 million jobs in Oklahoma in 2015. As discussed previously, the average employment at Tribal Gaming and related ancillary facilities was 27,944.

Tribal Government Gaming in Oklahoma, as a combined employment industry category, would rank as the **14th largest industry employer in the State of Oklahoma.**

To put this into context, approximately 2.1 percent of all jobs in Oklahoma exist at Tribal Gaming and ancillary facilities—**that equates to one in every 47 jobs.**

The following chart presents a summary of the top 30 industries by total employment for the State of Oklahoma.

Top 30 Oklahoma Industries by Employment



Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Wages and Benefits

Workers earned \$1.37 billion in wages and benefits at casinos and ancillary facilities in 2015. Like public corporations, the Tribes provided healthcare, dental, insurance, and other benefits with healthcare accounting for the most significant cost at \$320 million. This information is presented in the following table.

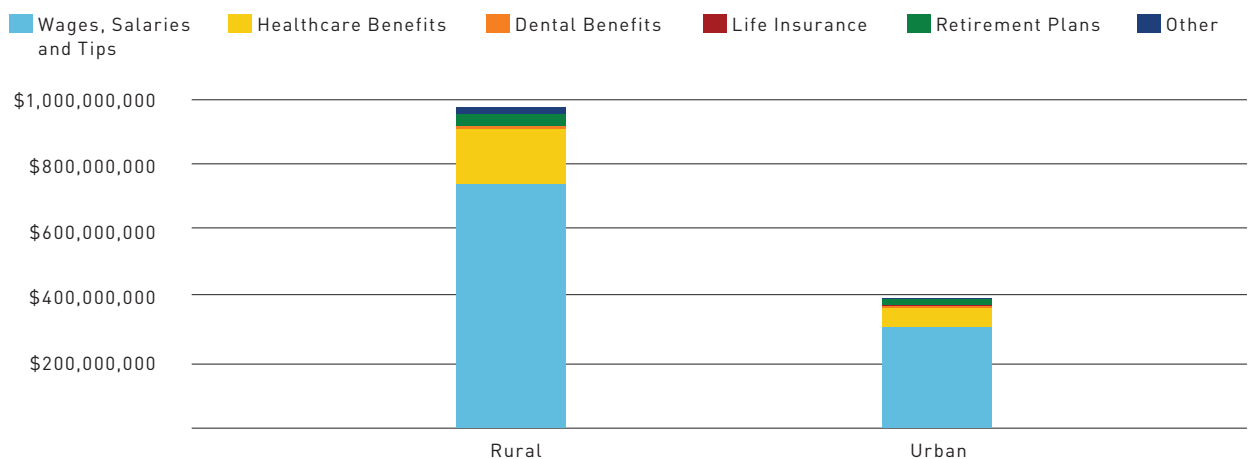
Employees at Rural Indian casinos in 2015 were paid over \$975 million in wages and benefits—more than 71 percent of total wages and benefits paid by Indian casinos in Oklahoma. This compares to urban casinos which paid employees over \$393 million—almost 29 percent of the statewide total.

2015 Wages and Benefits

CATEGORY	TOTAL	Percent	RURAL	Percent	URBAN	Percent
Wages, Salaries, and Tips	\$1,048,163,000	76.6%	\$740,344,000	75.9%	\$307,819,000	78.3%
Healthcare Benefits	227,550,000	16.6%	166,938,000	17.1%	60,612,000	15.4%
Dental Benefits	8,644,000	0.6%	6,344,000	0.7%	2,299,000	0.6%
Life Insurance	3,738,000	0.3%	2,405,000	0.2%	1,333,000	0.3%
Retirement Plans	56,135,000	4.1%	37,352,000	3.8%	18,782,000	4.8%
Other	24,377,000	1.8%	21,976,000	2.3%	2,401,000	0.6%
Total Wages and Benefits	\$1,368,607,000	100.0%	\$975,359,000	71.3%	\$393,246,000	28.7%

Source: Oklahoma Tribal Survey, Steven C. Agee Economic Research and Policy Institute, KlasRobinson Q.E.D.

2015 Wages and Benefits



Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Payroll and Related Taxes

Oklahoma Tribes paid out almost \$325 million in State and Federal payroll taxes from workers employed in gaming and related activities in 2015. The Tribes withheld over \$33 million in income taxes for the State of Oklahoma.

and Medicare through employer and employee contributions. This is of particular importance as the State and Nation continue to age, relying more heavily on the current working population to fund current benefits.

Additionally, Tribal Government Gaming provided \$176 million in payments to Social Security

This information is presented in the following table.

2015 Payroll Related Taxes

CATEGORY	TOTAL	RURAL	URBAN
Federal Withholding	\$115,051,000	\$82,297,000	\$32,754,000
State Withholding	33,424,000	23,865,000	9,559,000
Social Security — Employer	73,308,000	53,820,000	19,488,000
Social Security — Employee	71,141,000	52,908,000	18,234,000
Medicare — Employer	16,115,000	11,551,000	4,564,000
Medicare — Employee	15,794,000	11,512,000	4,283,000
Total	\$324,833,000	\$235,951,000	\$88,881,000

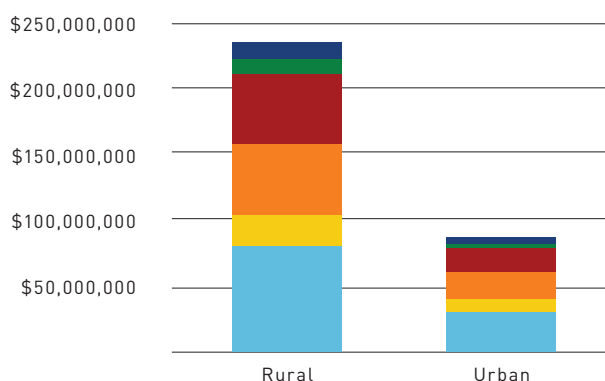
Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

As presented in the preceding table, rural Tribal casinos generated almost \$236 million in 2015, compared to almost \$89 million at urban casinos in the state.

2015 Payroll Related Taxes



The above figures do not include increased Federal and State payroll and income taxes paid by the suppliers of Tribal Gaming Operations in Oklahoma as a result of increased business volume. The magnitude of expenditures by Tribal Gaming Operations in Oklahoma for goods and services is discussed later in this report. It should also be noted that these figures do not include the tax revenue derived from expenditures by gaming facility patrons or employees for lodging, food and beverage, or other taxable items away from the gaming and associated facilities.



Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Visitation

During 2015 Tribal Gaming and related hotel and ancillary facilities had total annual visits of almost 46 million, including almost 18.5 million

from out of state. This compares to 2014 with total annual visits of over 38 million, including an estimated 14.6 million from out of state.

2015 Annual Visitation

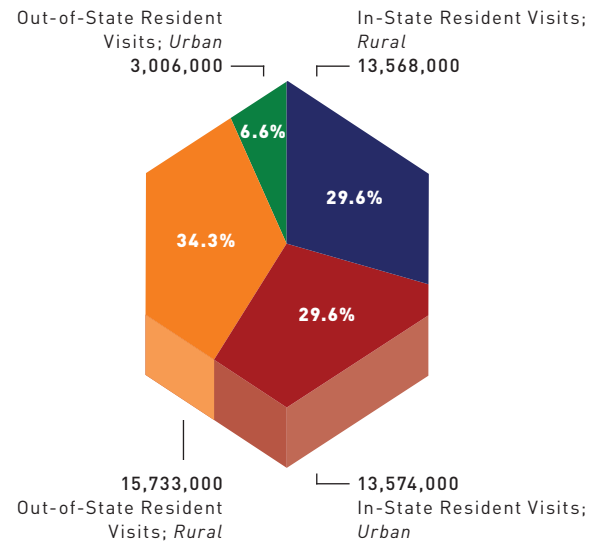
VISITOR RESIDENCE	TOTAL	Percent	RURAL	Percent	URBAN	Percent
In-State Resident Visits	27,142,000	59.2%	13,568,000	46.3%	13,574,000	81.9%
Out-of-State Resident Visits	18,738,000	40.8%	15,733,000	53.7%	3,006,000	18.1%
Total Visits	45,880,000	100.0%	29,301,000	63.9%	16,580,000	36.1%

Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

As presented above, rural and urban Tribal casinos in Oklahoma attract approximately the same amount of in-state resident visitors—around 13.5 million rural and 13.5 million urban. At the same time, rural Tribal casinos attract over 15.7 million visitors from outside of the state, more than five times that of urban casinos. Accordingly, Tribal gaming in Oklahoma, particularly those facilities located in rural areas, have created a tourism export for the State of Oklahoma, attracting millions of out of state visitors each year.

It is important to note that these visitors don't just spend money at Tribal Gaming Operations in Oklahoma, but at other businesses and attractions as well. Furthermore, the more time visitors spend at Tribal Gaming Facilities in Oklahoma, the greater the amount of money spent at area businesses, particularly by those visitors residing outside of Oklahoma.

2015 Annual Visits



Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

MULTIPLIER AND TOTAL IMPACT

The concepts of indirect and induced impact are among the most widely used and poorly understood tools in economic analysis. Fundamentally they are based upon an extension of the direct expenditures by the businesses and their patrons described above. Money spent at Tribal enterprises is redistributed back into the economy in the form of wages, taxes, and expenditures for goods and services.

In the case of the Tribally-Owned Gaming Operations, dollars spent in casinos are also redistributed into the economy in the form of wages, taxes, and expenditures for goods and services. In the same manner that the casino redistributes the gaming win and other revenue it receives, the people to whom those wages are paid and from whom the goods and services are purchased further redistribute the money they receive in wages to their employees and purchases for their own operating needs. It is the measurement of this ongoing cycle of redistribution which estimates of indirect and induced impact attempt.

Estimates of indirect and induced impact were prepared by Steven C. Agee Economic Research and Policy Institute at the Meinders School of Business at Oklahoma City University and KlasRobinson Q.E.D. 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. The IMPLAN model was developed at the University of Minnesota and is maintained by IMPLAN Group in Huntersville, North Carolina. The IMPLAN model has been in use since 1979. The IMPLAN model accounts

closely follow the accounting conventions used in the “Input-Output Study of the U.S. Economy” by the Bureau of Economic Analysis and the rectangular format recommended by the United Nations.

Induced impact calculated by the IMPLAN model reflects changes in spending from households as income/population increases or decreases due to changes in production, effectively measuring the impact of wages paid as they cycle through the economy. Indirect impact calculated by the IMPLAN model reflects changes in inter-industry purchase, effectively measuring the impact of expenditures for other goods and services by the Tribal enterprises as they, too, cycle through the economy.

Three types of impacts have been calculated:

- **Employment:** The annual average of monthly jobs in that industry. Thus, one job lasting 12 months = two jobs lasting six months each = three jobs lasting four months each. A job can be either full-time or part-time.
- **Annual Earnings:** Earnings is the equivalent to annual labor income plus benefits for one year.
- **Annual Output:** Output represents the value of industry production. In IMPLAN, these are annual production estimates for the year of the data set and are in producer prices. For manufacturers, this would be sales plus/minus change in inventory. For service sectors, production = sales. For retail and wholesale trade, output = gross margin.

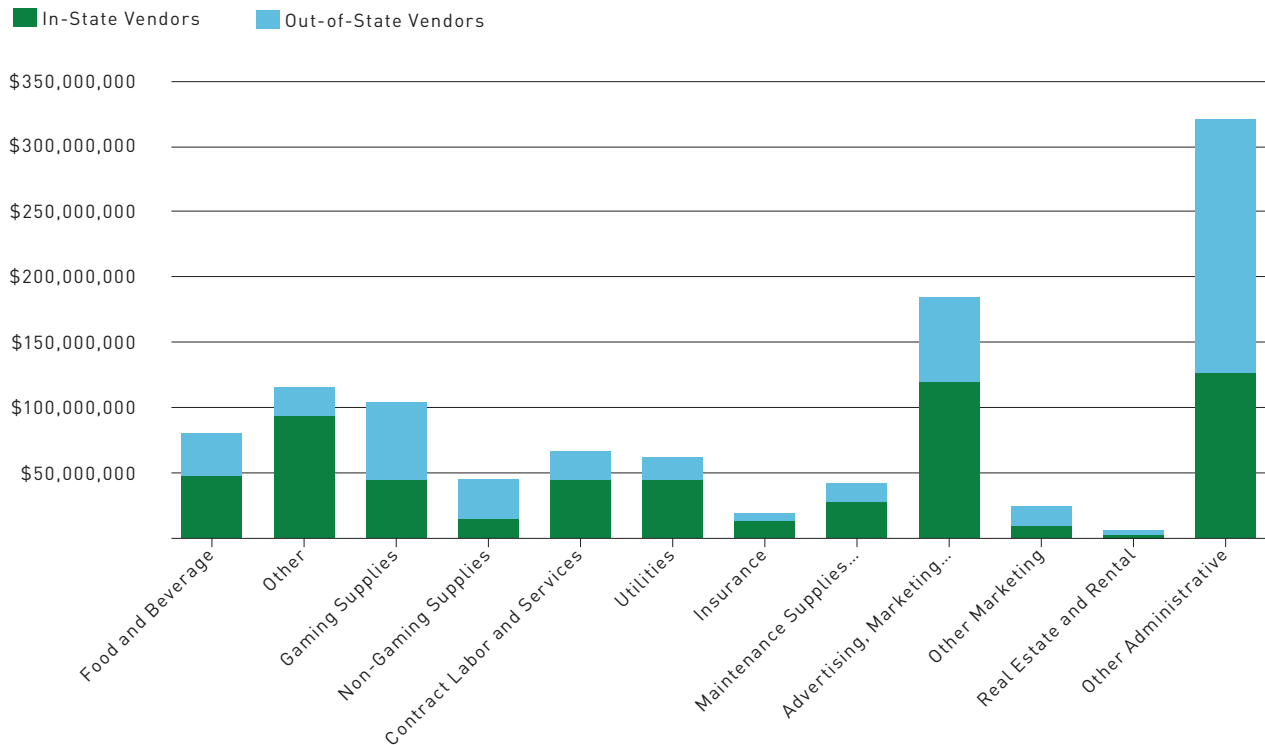
Impact from Operations

Output

Indirect output includes increases in production and/or sales at area businesses due to the increased demand generated by Tribal Gaming and related ancillary facilities in Oklahoma, as well as at businesses impacted by the providers of goods and services to the Tribal Gaming and related ancillary facilities in Oklahoma. Indirect impacts are derived from casino expenditures within the Oklahoma economy. In total, gaming and ancillary facilities spent \$1.07 billion with other businesses in 2015, of which \$593 million was spent within the State. This \$593

million accounts for the first round of indirect, or business-to-business impacts attributable to Tribal Government Gaming. When coupled with additional business spending from related industries to support Tribal Government Gaming, business-to-business spending topped \$797 million in 2015. This is the total statewide indirect impact of Tribal Government Gaming. The rural areas accounted for 59 percent of the initial statewide expenditures and 57 percent (\$456 million) of the total indirect impacts within the State.

2015 Purchases of Goods and Services



Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Tribal Gaming workers and workers in businesses supporting the industry spent an additional \$1.06 billion in Oklahoma from their employment earnings. This is the induced impact from Tribal Gaming. The total induced and indirect impact on the economic output on the State of Oklahoma as a whole is estimated to equal almost \$1.9 billion annually.

Adding the direct impact on output from Tribal Gaming and related ancillary facilities in Oklahoma to the indirect and induced impact

yields a total estimated annual impact on output of almost \$6.3 billion for the State of Oklahoma. Rural impacts accounted for 60 percent (\$3.8 billion) and urban impacts represented 40 percent (\$2.6 billion) of the statewide impacts from operations.

The following table and chart present a summary of the estimated annual impact on economic output in Oklahoma from Tribal Gaming and related ancillary facilities in Oklahoma.

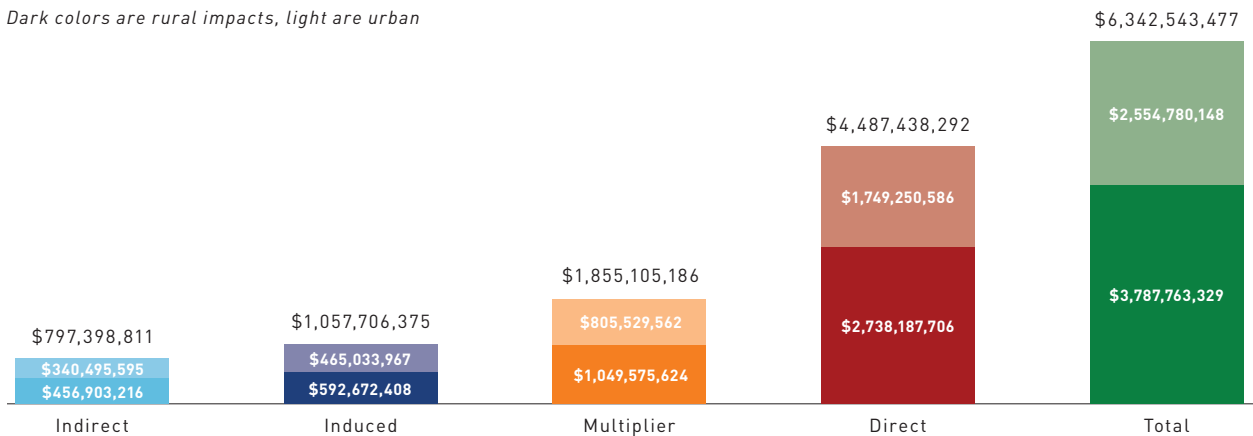
Output Impact from Operations

IMPACT	RURAL	Percent	URBAN	Percent	STATE OF OKLAHOMA
Indirect	\$456,903,216	57.3%	\$340,495,595	42.7%	\$797,398,811
Induced	\$592,672,408	56.0%	\$465,033,967	44.0%	\$1,057,706,375
Multiplier	\$1,049,575,624	56.6%	\$805,529,562	43.4%	\$1,855,105,186
Direct	\$2,738,187,706	61.0%	\$1,749,250,586	39.0%	\$4,487,438,292
Total	\$3,787,763,329	59.7%	\$2,554,780,148	40.3%	\$6,342,543,477

Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Operations Impact—Statewide, Rural, Urban

Dark colors are rural impacts, light are urban



Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Employment

Indirect and induced employment includes increases in employment at area businesses due to the increased demand generated by Oklahoma Tribal Gaming and related ancillary facilities, as well as at businesses impacted by the providers of goods and services to the gaming and related facilities. The total induced and indirect impact on employment on the State of Oklahoma is estimated to equal approximately 14,756 jobs—59 percent (8,754) rural and 41 percent (6,002) were urban.

Adding the direct impact on employment from Tribal Gaming and related ancillary facilities to the indirect and induced impact yields a total estimated impact on employment of approximately 42,700 jobs for the State of Oklahoma as a whole—64 percent (27,224) rural and 36 percent (15,476) urban.

The following table and chart present a summary of the estimated impact on employment from Tribal Gaming and related ancillary facilities in Oklahoma.

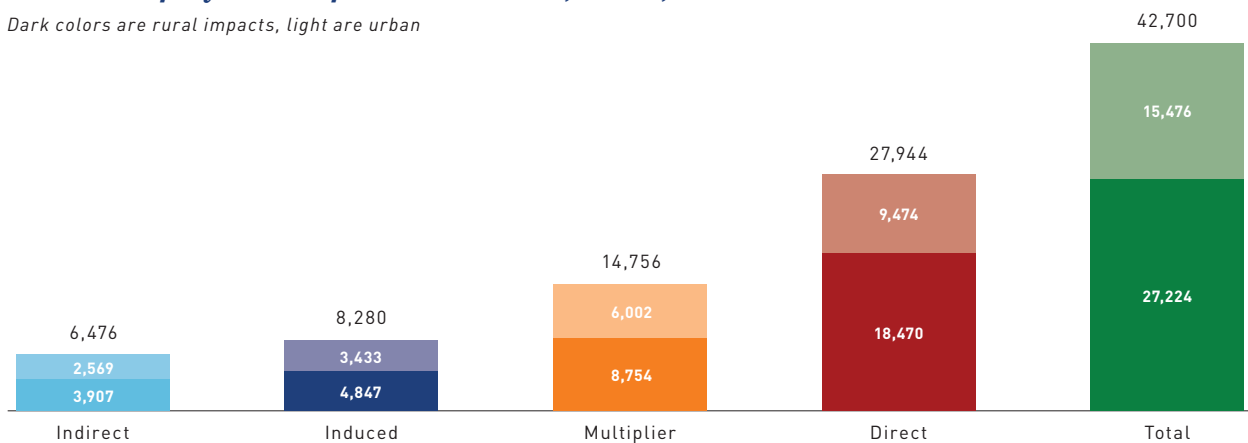
Employment Impact from Operations

IMPACT	RURAL	Percent	URBAN	Percent	STATE OF OKLAHOMA
Indirect	3,907	60.3%	2,569	39.7%	6,476
Induced	4,847	58.5%	3,433	41.5%	8,280
Multiplier	8,754	59.3%	6,002	40.7%	14,756
Direct	18,470	66.1%	9,474	33.9%	27,944
Total	27,224	63.8%	15,476	36.2%	42,700

Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Annual Employment Impact—Statewide, Rural, Urban

Dark colors are rural impacts, light are urban



Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Earnings

Indirect and induced earnings include increases in earnings at area businesses due to the increased demand generated by Tribal Gaming and related facilities in Oklahoma, as well as at businesses impacted by the providers of goods and services to the Oklahoma Tribal Gaming Operations. The total induced and indirect impact on personal income from Indian casinos and related ancillary facilities on the State of Oklahoma is estimated to equal more than \$606.2 million annually—51 percent (\$307.3 million) rural, and 49 percent (\$298.9 million) urban.

Adding the direct impact on earnings from the Tribal Gaming Operations to the indirect and induced impact yields a total estimated impact on personal income of almost \$2 billion annually for the State of Oklahoma as a whole—65 percent (\$1.3 billion) rural and 35 percent (\$692 million) urban.

The following table and chart present a summary of the estimated annual impact on personal income from Tribal Gaming Operations and related ancillary facilities in Oklahoma.

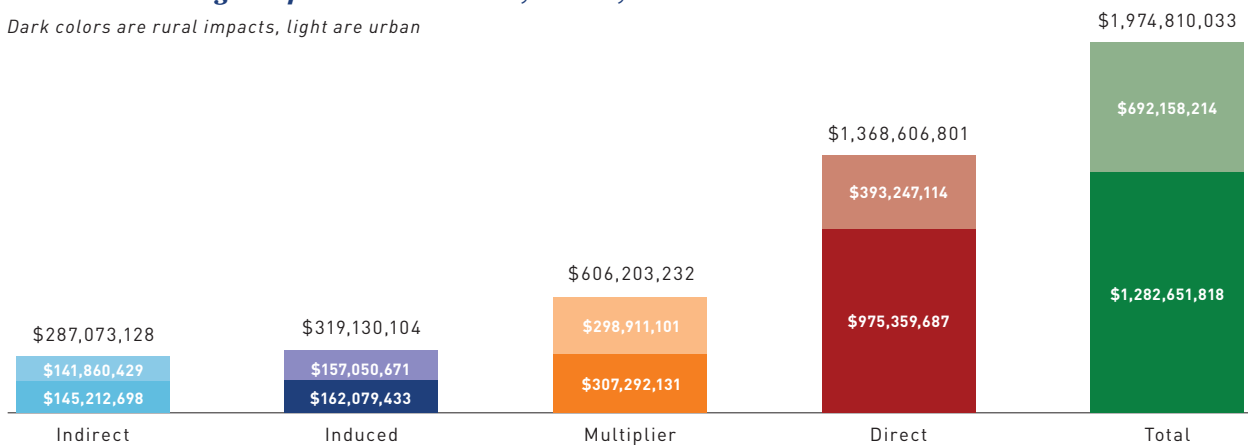
Earnings Impact from Operations

IMPACT	RURAL	Percent	URBAN	Percent	STATE OF OKLAHOMA
Indirect	\$145,212,698	50.6%	\$141,860,429	49.4%	\$287,073,128
Induced	\$162,079,433	50.8%	\$157,050,671	49.2%	\$319,130,104
Multiplier	\$307,292,131	50.7%	\$298,911,101	49.3%	\$606,203,232
Direct	\$975,359,687	71.3%	\$393,247,114	28.7%	\$1,368,606,801
Total	\$1,282,651,818	65.0%	\$692,158,214	35.0%	\$1,974,810,033

Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Annual Earnings Impact—Statewide, Rural, Urban

Dark colors are rural impacts, light are urban



Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Annual Capital Expenditures

In addition to normal operations, Tribal Governments regularly undertake construction projects to build, maintain or expand gaming facilities and connected infrastructure. These construction projects require significant Tribal expenditure(s) within the local economy and serve as an additional source of indirect impact. In 2015, participating Tribes reported spending over \$534 million on construction of facilities

and roads, of which 68 percent was spent in rural areas. Since capital expenditures vary greatly by Tribe and by year, we did not attempt to extrapolate these numbers across all Tribes. Thus, the capital expenditures reported here are likely a conservative estimate of the total actual expenditures in 2015. Capital expenditures are detailed in the table below.

2015 Construction Impact

2015	TOTAL		RURAL		URBAN	
Construction	\$533,304,000	99.8%	\$362,269,000	99.8%	\$171,035,000	99.8%
Related Road	1,085,000	0.2%	730,000	0.2%	355,000	0.2%
Sub-Total	\$534,389,000	100.0%	\$362,999,000	67.9%	\$171,390,000	32.1%
PRE-2015						
Construction	\$3,064,213,000	98.9%	NA	NA	NA	NA
Related Road	33,424,000	1.1%	NA	NA	NA	NA
Sub-Total	\$3,097,637,000	100.0%	NA	NA	NA	NA
TOTAL SINCE INCEPTION						
Construction	\$3,597,517,000	99.0%	NA	NA	NA	NA
Related Road	34,509,000	1.0%	NA	NA	NA	NA
Total	\$3,632,026,000	100.0%	NA	NA	NA	NA

Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Output Due to Capital Expenditures

As previously discussed, during 2015 Tribes in Oklahoma spent an estimated \$533.3 million on new and expanded gaming and ancillary developments and another \$1.1 million on road construction directly related to Tribal Gaming Operations. Combined, during 2015, Oklahoma Tribal Government Gaming spent over \$534.4 million on capital improvements directly related to Tribal Gaming Operations.

Output Impact from Construction

IMPACT	RURAL	Percent	URBAN	Percent	STATE OF OKLAHOMA
Indirect	\$89,930,041	45.6%	\$107,076,126	54.4%	\$197,006,166
Induced	\$77,906,683	47.0%	\$87,729,664	53.0%	\$165,636,348
Multiplier	\$167,836,724	46.3%	\$194,805,790	53.7%	\$362,642,514
Direct	\$362,999,382	67.9%	\$171,389,463	32.1%	\$534,388,845
Total	\$530,836,106	59.2%	\$366,195,253	40.8%	\$897,031,359

Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

\$897 MILLION+

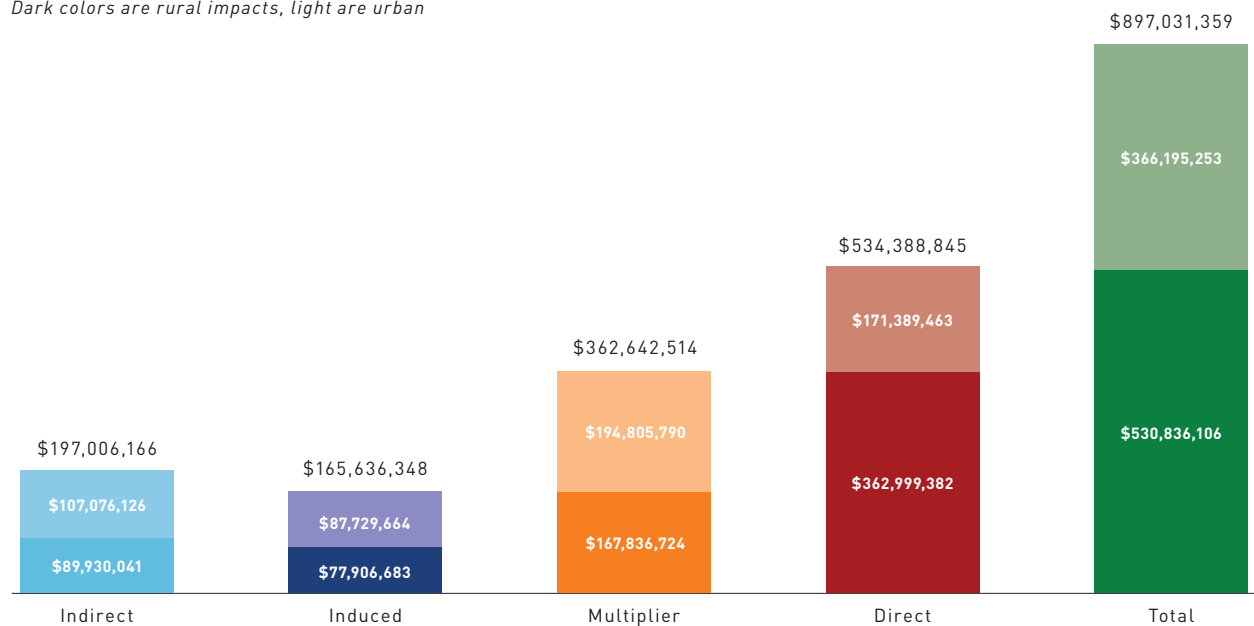
Estimated annual construction impact on output for the State of Oklahoma

Indirect and induced output includes increases in production and/or sales at area businesses due to the increased demand generated by capital expenditures by Tribal Gaming and related ancillary facilities in Oklahoma, as well as at businesses impacted by the providers of goods and services to the Tribal Gaming Operations and related ancillary facilities in Oklahoma. The total induced and indirect impact on the economic output due to capital expenditures by Tribal Gaming Operations on the State of Oklahoma as a whole is estimated

to equal over \$362.6 million annually, of which 46 percent occurred in rural areas. Adding the direct impact on output from capital expenditures by Tribal Gaming and related ancillary facilities in Oklahoma to the indirect and induced impact yields a total estimated annual impact on output of over \$897 million for the State of Oklahoma. These impacts were felt throughout the state with \$531 million (59 percent) in the rural areas and \$366.2 million (41 percent) in the urban areas.

Construction Impact—Statewide, Rural, Urban

Dark colors are rural impacts, light are urban



Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Employment Due to Capital Expenditures

Indirect and induced employment includes increases in employment at area businesses due to the increased demand generated by capital expenditures by Oklahoma Tribal Gaming Operations and related activities, as well as at businesses impacted by the providers of goods and services to Tribal Gaming and related ancillary facilities. The total induced and indirect impact on employment on the State of Oklahoma as a whole is estimated to equal approximately 2,294 jobs, of which 49 percent

occurred in rural areas. Adding the direct impact on employment from capital expenditures by Tribal Gaming Operations and related ancillary facilities to the indirect and induced impact yields a total estimated impact on employment of approximately 6,242 jobs for the State of Oklahoma as a whole. These employment impacts were felt throughout the state with 3,901 jobs (62.5 percent) in the rural areas and 2,341 jobs (37.5 percent) in the urban areas.

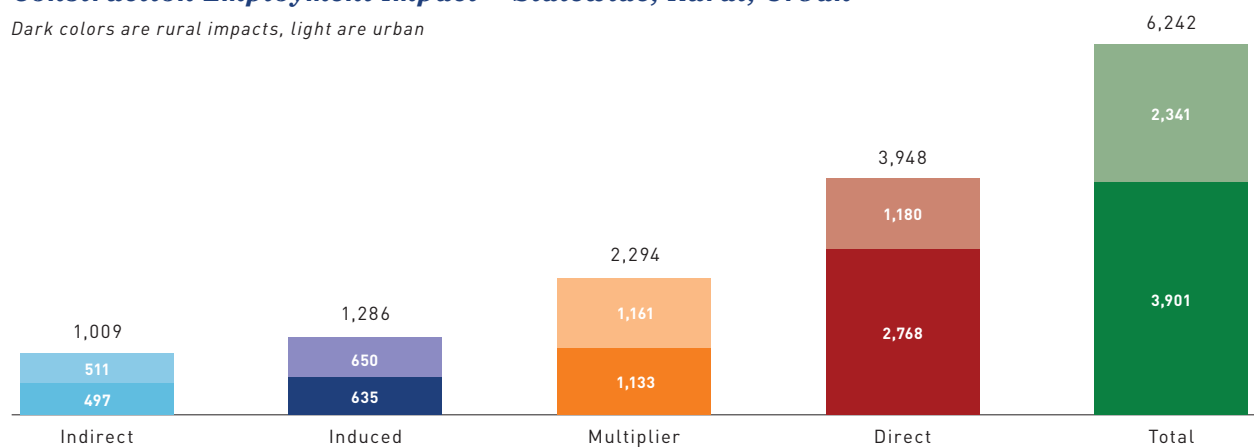
Employment Impact from Construction

IMPACT	RURAL	Percent	URBAN	Percent	STATE OF OKLAHOMA
Indirect	497	49.3%	511	50.7%	1,009
Induced	635	49.4%	650	50.6%	1,286
Multiplier	1,133	49.4%	1,161	50.6%	2,294
Direct	2,768	70.1%	1,180	29.9%	3,948
Total	3,901	62.5%	2,341	37.5%	6,242

Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Construction Employment Impact—Statewide, Rural, Urban

Dark colors are rural impacts, light are urban



Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Earnings due to Capital Expenditures

Indirect and induced earnings include increases in earnings at area businesses due to the increased demand generated by capital improvements by Tribal Gaming Operations and related ancillary facilities in Oklahoma, as well as at businesses impacted by the providers of goods and services to the Oklahoma Tribal Gaming Operations. The total induced and indirect impact on personal income from Tribal Gaming and related ancillary facilities on the State of Oklahoma is estimated to equal almost

\$107 million annually—\$43.6 million rural and \$63.7 million urban. Adding the direct impact on earnings from capital expenditures by the Tribal Gaming Operations to the indirect and induced impact yields a total estimated impact on personal income of over \$300 million annually for the State of Oklahoma as a whole. These earnings impacts were felt throughout the state with \$168 million (55.8 percent) in new income generated in rural areas and \$133 million (35.9 percent) in new income generated in urban areas.

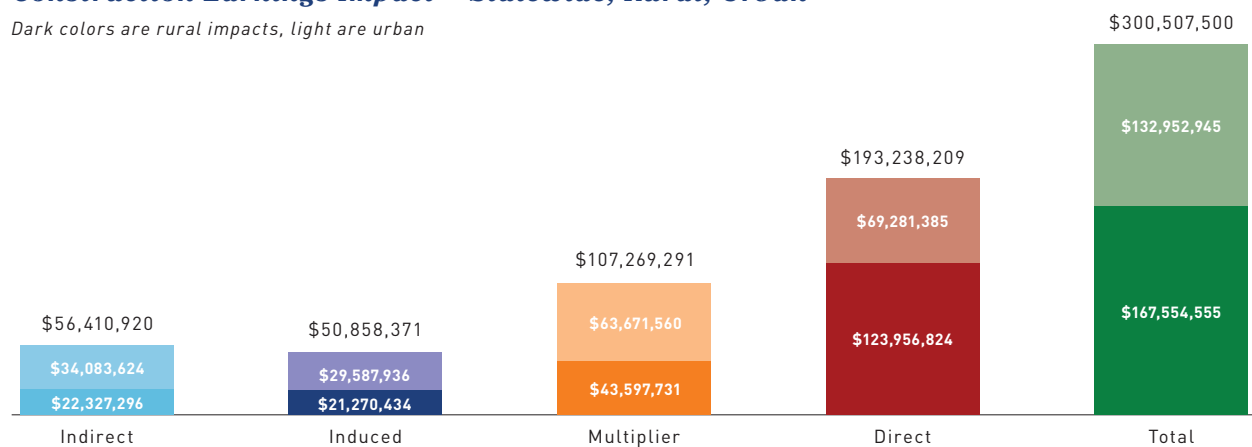
Earnings Impact from Construction

IMPACT	RURAL	Percent	URBAN	Percent	STATE OF OKLAHOMA
Indirect	\$22,327,296	39.6%	\$34,083,624	60.4%	\$56,410,920
Induced	\$21,270,434	41.8%	\$29,587,936	58.2%	\$50,858,371
Multiplier	\$43,597,731	40.6%	\$63,671,560	59.4%	\$107,269,291
Direct	\$123,956,824	64.1%	\$69,281,385	35.9%	\$193,238,209
Total	\$167,554,555	55.8%	\$132,952,945	44.2%	\$300,507,500

Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

Construction Earnings Impact—Statewide, Rural, Urban

Dark colors are rural impacts, light are urban



Source: Oklahoma Tribal Survey, Oklahoma City University Center for Native American and Urban Studies, KlasRobinson Q.E.D.

ADDENDUM: A

- Oklahoma Indian Casinos
by Tribe and Location
- Map of Oklahoma Indian Casinos

Oklahoma Indian Casinos by Tribe and Location

Absentee Shawnee Tribe of Oklahoma

Thunderbird Casino, *Norman*
Thunderbird Casino, *Shawnee*

Caddo Nation of Oklahoma

Bison Ridge Casino and Travel Plaza, *Gracemont*

Cherokee Nation

Cherokee Nation Outpost Tobacco Shop, *Catoosa*
Cherokee Casino & Hotel, *Roland*
Cherokee Casino, *South Coffeyville*
West Siloam Springs Smoke Shop, *West Siloam Springs*
Hard Rock Hotel & Casino, *Tulsa*
Cherokee Casino, *Fort Gibson*
Cherokee Casino, *Ramona*
Cherokee Casino, *Sallisaw*
Cherokee Casino, *Tahlequah*
Cherokee Casino & Hotel, *West Siloam Springs*

Cheyenne and Arapaho Tribes of Oklahoma

Lucky Star Casino, *Canton*
Lucky Star Casino, *Clinton*
Lucky Star Casino, *Concho*
Lucky Star Travel Center Casino, *Concho*
Luck Star Casino, *Hammon*
Lucky Star Casino, *Watonga*

Chickasaw Nation

Ada Gaming Center, *Ada*
Chickasaw Travel Stop, Ada Gaming West, *Ada*
Gold Mountain Casino, *Ardmore*
Chickasaw Travel Stop, Davis Gaming, *Davis*
Treasure Valley Casino, *Davis*
Chisholm Trail Casino, *Duncan*
Texoma Casino, *Kingston*
Madill Gaming Center, *Madill*
Newcastle Casino, *Newcastle*
Goldsby Gaming Center, *Norman*
Riverwind Casino, *Norman*
Washita Casino, *Paoli*
Jet Stream Casino, *Pauls Valley*
SaltCreek Casino, *Pocasset*
The Artesian Hotel Casino & Spa, *Sulphur*
Border Casino, *Thackerville*

Chickasaw Travel Stop, *Thackerville*
WinStar World Casino and Resort, *Thackerville*
Chickasaw Tobacco Shop, *Tishomingo*
Black Gold Casino, *Wilson*
Wilson Chickasaw Travel Plaza, *Wilson*

Choctaw Nation of Oklahoma

Choctaw Antlers Travel Plaza, *Antlers*
Choctaw Travel Plaza, *Atoka*
Broken Bow Travel Plaza, *Broken Bow*
Choctaw Casino, *Broken Bow*
Choctaw Travel Plaza, Durant West, *Durant*
Choctaw Casino Resort, *Durant*
Choctaw Travel Plaza, Durant East, *Durant*
Choctaw Casino Resort, *Grant*
Choctaw Travel Plaza, *Grant*
Choctaw Casino, *Idabel*
Choctaw Travel Plaza, *Idabel*
Choctaw Casino, *McAlester*
Choctaw Casino Too, *McAlester*
Choctaw Casino, *Pocola*
Choctaw Casino Too, *Pocola*
Choctaw Travel Plaza, *Poteau*
Choctaw Casino, *Stigler*
Choctaw Casino, *Stringtown*
Choctaw Travel Plaza, *Stringtown*
Choctaw Travel Plaza, *Wilburton*

Citizen Potawatomi Nation

FireLake Casino, *Shawnee*
Grand Casino Hotel Resort, *Shawnee*

Comanche Nation

Comanche Nation Travel Plaza, *Devol*
Comanche Red River Casino, *Devol*
Comanche Spur Casino, *Elgin*
Comanche Nation Casino, *Lawton*
Comanche Star Casino, *Walters*

Delaware Nation

Gold River Casino, *Anadarko*
Casino Oklahoma, *Hinton*

Eastern Shawnee Tribe of Oklahoma

Bordertown Casino and Arena, *Wyandotte*
Indigo Sky Casino, *Wyandotte*
Outpost Casino, *Wyandotte*

Fort Sill Apache Tribe of Oklahoma

Apache Casino Hotel, *Lawton*

Iowa Tribe of Oklahoma

Ioway Casino, *Chandler*

Cimarron Casino, *Perkins*

Ioway Travel Plaza, *Tryon*

Kaw Nation

Kanza Travel Plaza, *Braman*

SouthWind Casino, *Braman*

SouthWind Casino, *Newkirk*

Kickapoo Tribe of Oklahoma

Kickapoo Casino, *Harrah*

Kickapoo Conoco Station, *Harrah*

Kickapoo Casino, *Shawnee*

Kiowa Tribe of Oklahoma

Kiowa Casino, *Verden*

Kiowa Casino, *Devol*

Miami Tribe of Oklahoma

Prairie Moon Casino, *Miami*

Prairie Sun Casino, *Miami*

Modoc Tribe of Oklahoma

The Stables Casino, *Miami*

Osage Nation

Osage Casino, *Bartlesville*

Osage Casino, *Hominy*

Osage Casino, *Pawhuska*

Osage Casino, *Ponca City*

Osage Casino, *Sand Springs*

Osage Casino, *Skiatook*

Osage Casino, *Tulsa*

Muscogee (Creek) Nation

Creek Nation Casino Duck Creek, *Beggs*

Creek Nation Casino, *Bristow*

Creek Nation Casino, *Checotah*

Creek Nation Casino, *Eufaula*

Creek Nation Casino, *Holdenville*

Creek Nation Casino, *Muscogee*

Muscogee Travel Plaza, *Muskogee*

Creek Nation Casino, *Okemah*

Okmulgee Travel Plaza, *Okmulgee*

One Fire Casino, *Okmulgee*

River Spirit Casino Resort, *Tulsa*

Otoe-Missouria Tribe of Oklahoma

7 Clans Gasino Chilocco, *Newkirk*

First Council Casino, *Newkirk*

7 Clans Perry Casino, *Perry*

7 Clans Gasino Red Rock, *Red Rock*

7 Clans Paradise Casino, *Red Rock*

Ottawa Tribe of Oklahoma

High Winds Casino, *Miami*

Pawnee Nation of Oklahoma

Stone Wolf Casino & Grill, *Pawnee*

Trading Post Casino, *Pawnee*

TeePee Casino, *Yale*

Peoria Tribe of Indians of Oklahoma

Buffalo Run Casino

Quapaw Tribe of Oklahoma

Quapaw Casino, *Miami*

Downstream Casino Resort, *Quapaw*

Sac and Fox Nation of Oklahoma

The Black Hawk Casino, *Shawnee*

Sac & Fox Nation Stroud Casino, *Stroud*

Seminole Nation of Oklahoma

Rivermist Casino, *Konawa*

Seminole Nation Casino, *Seminole*

Wewoka Trading Post Casino, *Wewoka*

Seneca-Cayuga Tribe of Oklahoma

Grand Lake Casino, *Grove*

Thlopthlocco Tribal Town

Golden Pony Casino, *Clearview*

Tonkawa Tribe of Oklahoma

Native Lights Casino, *Newkirk*

Tonkawa Casino West, *Tonkawa*

Wichita & Affiliated Tribes

Sugar Creek Casino, *Hinton*

Wyandotte Tribe of Oklahoma

Lucky Turtle Casino, *Wyandotte*

Wyandotte Nation Casino, *Wyandotte*

Map of Oklahoma Indian Casinos





Center for Native American and Urban Studies

The Center for Native American and Urban Studies provides timely and objective research for key business, Tribal, policy, civic, and non-profit decision makers. Research activities

consist largely of econometric forecasting of regional economic activity, economic impact analysis, and policy analysis. Our clients include sovereign nations, companies both large and small, city and state government agencies, chambers of commerce, and industry organizations. Center staff are frequently requested as speakers for state and local events and institute research and faculty commentary is recognized regularly in local and national media outlets including *The Economist*, *The Fiscal Times*, *The Wall Street Journal*, *The Oklahoman*, *The Journal Record*, *OKC Biz Magazine*, The Oklahoma Forum, Oklahoma Public Radio, and many others.



***Kyle D.
Dean, Ph.D.***
**Director,
Center for Native
American and
Urban Studies**

Dr. Kyle Dean is an experienced professional economist who provides economic analysis for governments, businesses, Tribes, and non-profit leaders. Dr. Dean began consulting in 2005 and his client list includes some of Oklahoma's most influential businesses and trade associations, including the Oklahoma Independent Producers

Association (OIPA), the Oklahoma Bankers' Association (OBA), the Oklahoma Telephone Association (OTA), and many others. He is best known for his comprehensive work with Oklahoma Tribes, having completed the first ever estimate of the combined economic impacts from Oklahoma Tribal activities.

Dr. Dean received his Ph.D. in Economics from Oklahoma State University. He is a member of the American Economic Association and the National Association of Business Economists. He currently serves as the Associate Director for the Steven C. Agee Economic Research and Policy Institute and as the Director of the Center for Native American and Urban Studies at Oklahoma City University.



The Company

The principals of KlasRobinson Q.E.D., Jim Klas and Matthew Robinson, have been at the forefront of Indian gaming developmental and financial analysis throughout their careers, having worked with more than 250 different Tribes and Tribal Organizations.

KlasRobinson Q.E.D.* has extensive experience in analyzing the economic and social impact of Tribal gaming operations and related ancillary developments, as well as other Tribally owned and/or operated enterprises. James Klas and Matthew Robinson, the principals of KlasRobinson Q.E.D., are recognized as leaders in the analysis of the economic and social impact of Tribal Government Gaming.

The principals of KlasRobinson Q.E.D. authored the landmark studies entitled, “**Economic Benefits of Indian Gaming in the State of Minnesota,**” and subsequent updates on behalf of the **Minnesota Indian Gaming Association (MIGA)**, “**Economic Benefits of Indian Gaming in the State of Oregon,**” on behalf of the affiliated gaming Tribes of Oregon and, “**Economic Benefits of Indian Gaming in Kansas,**”

on behalf of the affiliated gaming Tribes of Kansas have been distributed in both the United States and Canada and widely quoted in the gaming industry trade press.

KlasRobinson Q.E.D. has also completed several statewide impact analyses in Arizona. The first analysis, conducted on behalf of the **Arizona Indian Gaming Association (AIGA)** and its 19 member Tribes included the impact of changes in future population through the year 2052 on the number of future gaming device allocations and new gaming operating rights for Indian Tribes in the State of Arizona, based on existing Tribal-State compacts.

More recently, KlasRobinson Q.E.D. completed an impact analysis on behalf of **Arizonans for Tribal Government Gaming (ATG2)** and its 18 member Tribes for the introduction of slot machines and table games at racetracks in the State. Analysis included estimates of revenue at nine planned racinos and the corresponding impact on gaming revenues at each Indian casino in the state.

KlasRobinson Q.E.D. has also conducted economic impact studies on behalf of more than two dozen individual Tribes including the **Quawpaw Tribe of Oklahoma** in the tri-state area, **Agua Caliente Band of Cahuilla Indians in Palm Springs**, and the **Shakopee Mdewakanton Sioux Community in the Twin Cities**. Such impact studies for individual projects have been used for public relations and lobbying efforts, as well as to fulfill submission requirements to the National Indian Gaming Commission.

* For additional information on our background and qualifications, please visit our website at: www.klasrobinsonqed.com



James M. Klas
Founder & Principal



Co-founder and Principal of KlasRobinson Q.E.D., Jim Klas has over 25 years of operational and consulting experience in the hospitality industry. Mr. Klas has provided development consulting to numerous hotel, resort, casino, and convention center projects throughout the United States, as well as the provinces of Ontario, Quebec, and British Columbia in Canada.

Mr. Klas is a nationally recognized expert in economic impact analysis for the hospitality industry. He has authored studies commissioned by the Minnesota Indian Gaming Association and by Sodak Gaming Supplies, Inc., of the economic benefits of Tribal Government Gaming in Minnesota, as well as studies of the economic benefits of Tribal gaming in the states of Oregon and Kansas for the gaming Tribes in those states. He has also performed economic and social impact studies for the Minnesota Restaurant Association, the Minneapolis Convention Center, the University of St. Thomas, and for individual casinos and hotel projects in both the United States and Canada.

Mr. Klas is a frequent speaker at annual conventions of the National Indian Gaming Association, the NYU International Hospitality Industry Investment Conference, IGBE, and the World Gaming Congress. He has been quoted in *International Gaming & Wagering Business*,

Casino Executive, *The New York Times*, *The Las Vegas Sun*, and several other local and regional newspapers and periodicals. He provided expert commentary in a National Public Television documentary on Tribal Government Gaming. He has also authored several articles for the *Grogan Report*, *Minnesota Real Estate Journal*, *Casino Magazine*, and *Indian Gaming Magazine*.

Mr. Klas has a Master's degree from the Cornell University School of Hotel Administration and a Bachelor's degree in Economics from the University of Minnesota. He is a past president of the Minnesota Association of Hospitality Accountants and past member of the Hospitality Education Committee of the Minnesota Hotel, Restaurant, and Resort Associations. Mr. Klas has also taught Hospitality and Tourism Development and Marketing at Metropolitan State University in Minneapolis.

Prior to co-founding KlasRobinson Q.E.D., Mr. Klas was the Senior Vice President in charge of the Hospitality Group at GVA Marquette Advisors. In addition to his past leadership at GVA Marquette Advisors, Mr. Klas was Vice President and co-founder of the consulting firm MHA Research and spent four years as a hospitality consultant with Laventhol & Horwath, formerly a major U.S. public accounting firm.



Matthew Robinson
Founder & Principal



Co-founder and Principal of KlasRobinson Q.E.D., Matt Robinson has been a consultant in the hospitality industry for more than 20 years, specializing in market research, feasibility analyses, and economic impact studies. Mr. Robinson has consulted on numerous casino, hotel, and other hospitality and leisure industry projects. With a background in planning and economic development, Mr. Robinson has specific expertise working in Indian Country on gaming and other Tribal economic diversification projects, having worked with over 200 different Indian Tribes.

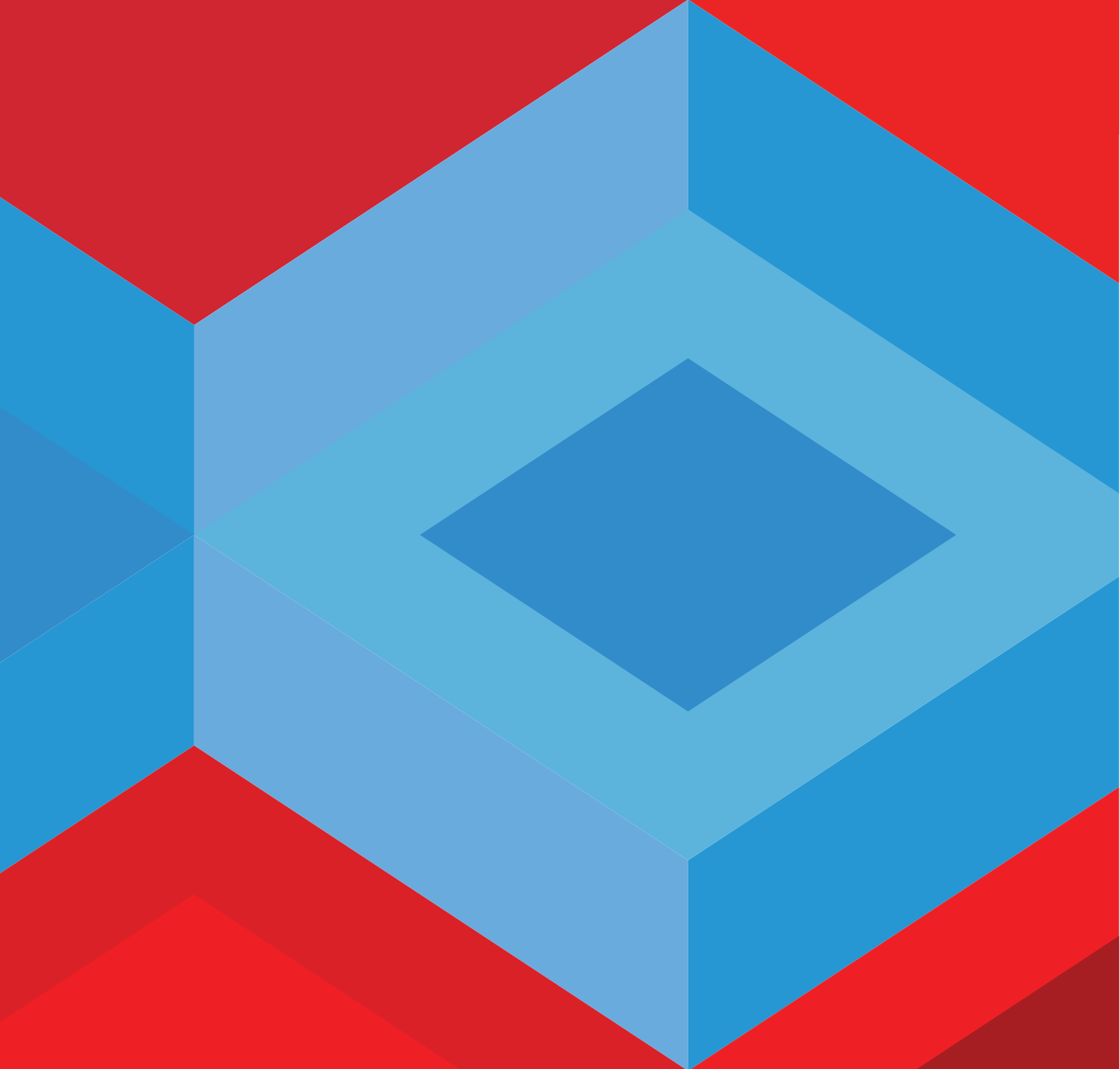
Mr. Robinson served two consecutive two-year terms as the Associate Member Representative on the Executive Board of the National Indian Gaming Association (NIGA). Mr. Robinson is the 2010 recipient of NIGA's "Outstanding Service Award," and currently serves on NIGA's Spirit of Sovereignty Scholarship Committee.

Mr. Robinson is a frequent speaker at national and regional conferences on issues related to feasibility, economic impact, and planning. He is a guest lecturer at colleges and universities including his alma mater Macalester College. Mr. Robinson is also a featured contributor to a variety of national trade publications including

Indian Gaming Magazine and Casino Enterprise Management Magazine, and is often quoted in regional, and national publications.

Mr. Robinson has a Master's degree in Planning with a secondary concentration in economic and community development from the Humphrey Institute at the University of Minnesota. While at the Humphrey Institute, Mr. Robinson conducted research at the Tourism Center of the University of Minnesota, specializing in rural tourism development. He is a graduate of Macalester College with a Bachelor of Arts degree in three majors: Economics, Spanish, and International Studies. During the 1988-89 academic year, he attended the Universidad De Complutense and the Institute of European Studies in Madrid, Spain.

Mr. Robinson also has more than five years of operational and management experience working in various facets of the hospitality industry both at home and abroad. He is fluent in oral and written Spanish and is a member of La Sociedad Hispanica Sigma Delta of the National Spanish Honor Society. Mr. Robinson is also a member of Omicron Delta Epsilon of the National Economics Honor Society.



Content current as of October 19, 2016.



OKLAHOMA INDIAN GAMING ASSOCIATION

923 North Robinson, Suite 200

Oklahoma City, OK 73102

405.600.9044

OIGA.org