

THE ECONOMIC IMPACT OF TRIBAL GAMING: A FIRST-EVER STATE-BY-STATE ANALYSIS

Key Takeaways from the report authored by **Alan Meister, Ph.D.**

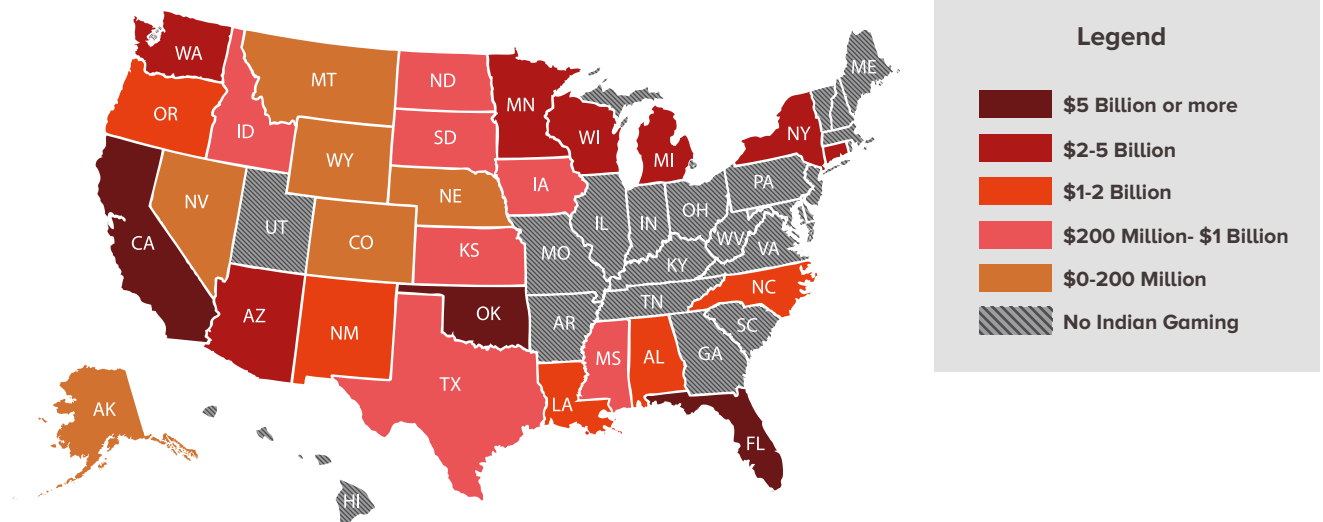
The U.S. casino gaming industry has long been a significant contributor to the national as well as state economies, driving an array of economic activity including spending, jobs, wages, taxes, other government revenue and capital investment. The tribal gaming sector, which generates over 44% of all gaming revenue in the U.S., is a critical driver of that economic activity.

Since the passage of the Indian Gaming Regulatory Act (IGRA) in 1988, tribal gaming has grown 300-fold from a \$121 million segment of the U.S. gaming industry, consisting of small bingo halls and gaming facilities, to a \$30 billion plus segment in 28 states. Those revenues, which by law, are used to support reservation communities, have boosted tribes' socioeconomic status by stimulating their economy, reducing unemployment, raising incomes and improving infrastructure on reservations.

QUICK FACTS:

- **\$96.6** billion in output (value of sales);
- **635,000** jobs (measured as FTEs);
- **\$33.2** billion in wages to employees; and
- **\$16.0** billion in taxes and direct payments to federal, state and local governments.

Economic Impact of Tribal Gaming: Output



ECONOMIC & FISCAL IMPACT OF TRIBAL GAMING, 2014¹

States	Economic Impact			Fiscal Impact	
	Output ²	Jobs ³	Wages ⁴	Tax Revenue & Direct Payments ⁵	Gaming Facilities
Alabama	\$1,247,338,811	11,114	\$396,368,437	\$180,587,911	3
Alaska	\$4,000,667	31	\$1,141,082	\$442,310	2
Arizona	\$4,495,471,434	37,132	\$1,898,261,121	\$769,023,882	23
California	\$17,389,638,613	111,931	\$7,867,958,054	\$3,010,339,509	72
Colorado	\$140,778,828	1,286	\$47,217,690	\$25,687,656	2
Connecticut	\$3,719,244,921	25,197	\$1,218,786,922	\$828,603,827	2
Florida	\$5,665,725,032	43,786	\$2,329,896,292	\$1,086,706,764	8
Idaho	\$294,123,148	2,842	\$93,770,046	\$45,346,718	9
Iowa	\$270,536,351	1,745	\$70,668,110	\$50,326,111	3
Kansas	\$573,387,984	3,794	\$153,133,573	\$75,086,681	5
Louisiana	\$1,108,890,989	7,673	\$310,461,998	\$156,329,929	4
Michigan	\$3,380,323,735	22,034	\$1,209,966,858	\$696,872,674	24
Minnesota	\$3,550,526,981	28,706	\$1,336,805,612	\$781,020,019	40
Mississippi	\$494,876,854	4,277	\$164,121,126	\$94,146,613	3
Montana	\$50,206,968	450	\$14,917,618	\$7,402,585	15
Nebraska	\$14,264,929	111	\$3,646,487	\$2,357,377	4
Nevada	\$98,699,035	988	\$53,561,324	\$29,339,393	5
New Mexico	\$1,772,553,332	15,045	\$593,311,131	\$280,812,622	26
New York	\$2,331,518,243	10,127	\$634,228,828	\$310,054,778	10
North Carolina	\$1,329,595,270	11,730	\$529,896,668	\$205,170,466	2
North Dakota	\$493,348,424	4,451	\$150,229,533	\$73,149,032	11
Oklahoma	\$8,721,358,599	65,992	\$3,687,703,967	\$2,177,732,469	126
Oregon	\$1,203,055,023	10,601	\$433,643,360	\$181,535,108	9
South Dakota	\$266,704,691	2,762	\$87,349,726	\$54,292,453	14
Texas	\$216,087,072	1,655	\$74,896,238	\$41,779,405	1
Washington	\$4,994,011,498	33,613	\$1,826,542,706	\$1,187,585,304	32
Wisconsin	\$2,834,192,706	25,495	\$1,086,281,998	\$476,960,395	31
Wyoming	\$127,232,747	1,213	\$41,582,602	\$23,346,738	4
United States⁶	\$96,638,101,206	635,320	\$33,221,028,966	\$16,033,191,515	490

Source: Nathan Associates analysis; Alan Meister, *Casino City's Indian Gaming Industry Report*, 2017 Edition, Newton: Casino City Press

Notes:

¹ Includes direct, indirect, and induced effects of gaming and non-gaming revenues. Figures are in 2014 dollars.

² Equals value of sales.

³ Measured as full-time equivalents (FTEs).

⁴ Measured as salaries, wages, bonuses, tips and benefits.

⁵ Direct Payments consist of agreed upon gaming-related payments by tribes to federal, state, and local governments.

⁶ Results for the United States (except Gaming Facilities) do not equal the sum of states given United States impacts are nationwide and each state's impacts are only state-wide.

Methodology: Nathan Associates used an input-output analysis based upon the IMPLAN economic modelling system to calculate the cumulative economic and fiscal impacts of tribal gaming on U.S. and state economies.