



UNITED *for*
OKLAHOMA



THE ECONOMIC IMPACT *of* TRIBAL NATIONS IN OKLAHOMA

FISCAL YEAR 2023

Kyle D. Dean, PhD • May 23, 2025



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A handwritten signature in black ink, appearing to read 'K. D. Dean', followed by a long horizontal line extending to the right.

Kyle D. Dean, PhD

Executive Summary

Direct Employment and Wages for Oklahomans

Oklahoma tribes employed 55,659 Oklahoma workers in 2023, paying out wages and benefits totaling \$3.3 billion to Oklahomans.

Direct Oklahoma Production

When combining business revenues, government expenditures, and capital expenditures, Oklahoma tribes accounted for \$12.7 billion in direct Oklahoma production.

Education, Health Care, and Tribal Gaming

- Tribal Gaming and related businesses generated \$7.4 billion in revenues. These revenues were used to provide programs and services for tribal citizens and non-citizens, and to promote the long-run sustainability of the tribes.
- Tribes invested \$351 million for education and human capital development in the state.
- Tribes spent \$582 million providing health care services for over 3.5 million patient visits in the state.

Total Economic Impact

When analyzed in the context of the Oklahoma economy and accounting for spillover (multiplier) impacts, we estimate that tribal activities supported:

- 139,860 jobs in the state
- \$7.8 billion in wages and benefits to Oklahoma workers
- \$23.4 billion in state production of goods and services

Introduction

This report evaluates and quantifies the statewide economic contribution of tribes within the state of Oklahoma. Working with the tribes, we gathered data on tribal businesses, governments, and other sources of tribal contribution such as expenditures on capital projects and federal dollars that come to the state to support projects within the Oklahoma tribal areas. We received data from 19 participating tribes (see Appendix A for list). We used this data along with data from other sources to create an economic profile of aggregated tribal activity within the state.

The data from this profile were used as primary inputs into our economic model which was used to quantify the output, value added, employment, and wages and benefits (payroll) impacts of tribal activity generated in Oklahoma. This methodology follows that of previous studies completed for all tribal activity Dean (2012) and Dean

(2019), all gaming activities (Dean and Robinson 2015) and (Dean and Robinson 2016), and many other reports created for individual tribes.

The impact estimates in this report do not represent the exact impact(s) of the tribes (which is unknowable). Rather, they should be interpreted as good faith estimates of the economic contribution of all Oklahoma tribal activity and the corresponding spillover effects generated by economic linkages with other Oklahoma institutions and citizens. Comparison of results with previous studies is useful for understanding the nature of the change of activity and impact, but should not be viewed as precise, exact developments.

Background

Tribes in Oklahoma

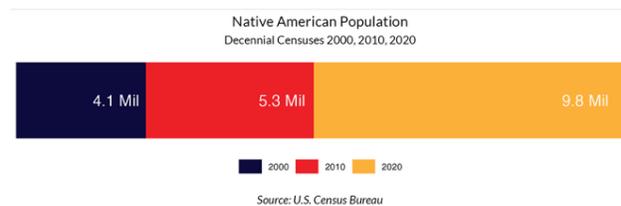
There are 38 federally recognized tribes in the state (see Appendix A for complete list). From the Eastern Shawnee Tribe in the northeast corner to the Cheyenne and



Arapaho Tribes bordering the Texas Panhandle in the West to the Choctaw Nation in the southeast corner, tribal activities touch nearly every part of the state.

Native American Population

The 2020 U.S. Census reported an 86% increase in the American Indian or Alaska Native (AIAN) population in the United States¹. According to the U.S. Census Bureau 2010 Decennial Census, the American Indian and Alaska Native population alone, or in combination with one or more other races was 5.3 million and represented 1.7% of the total population in the United States. In 2020, the AIAN population increased to 9.8 million, representing 2.9% of the U.S. population.

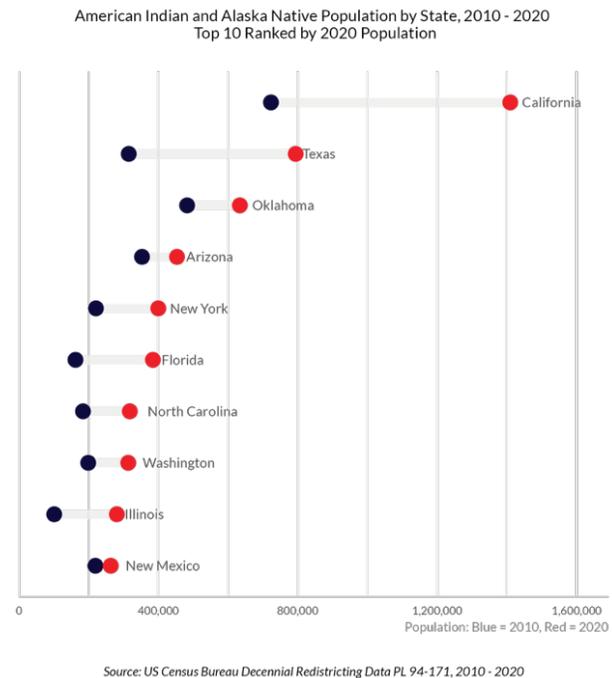


At first glance, it appears that the number of Native Americans has increased significantly due to a combination of increased birth rates and/or repatriation of Native Americans living abroad. Upon closer inspection, the large increase can be explained by an increase in the number of Americans choosing multiple race

¹ In the 2020 census, the Census Bureau created a decoupled American Indian dataset in addition to the traditional AIAN dataset. The typical AIAN dataset was used here for comparison purposes.

categories and Hispanic or Latino populations choosing AIAN as race in combination with other races. The Latino identification with AIAN stems from how the Census defines American Indian or Alaska Native individuals as “having origins in any of the original peoples of North and South America (including Central America)².” Latinos accounted for 51% of U.S. population growth from 2010 to 2020 and now represent 18.7% of the population, up from 16.3% in 2010.

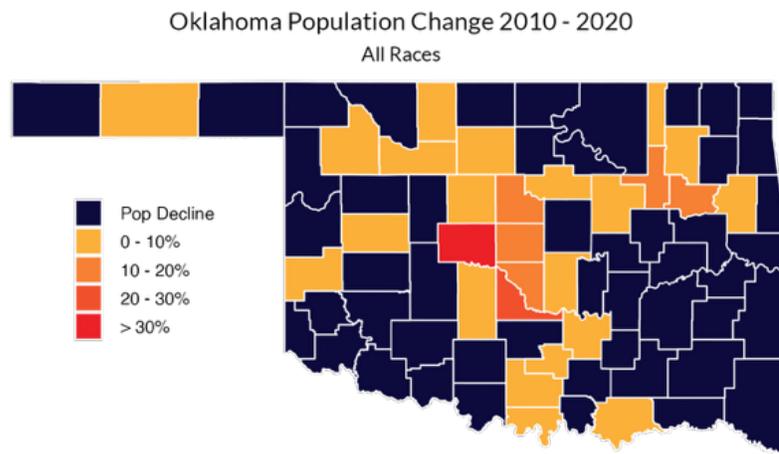
The use of census data to represent the AIAN population has always been imperfect due to the nature of self-identification. Native American tribes determine their own



² “About the Topic of Race,” U.S. Census Bureau, <https://www.census.gov/topics/population/race/about.html>

requirements for citizenship leading to differences in the number of officially enrolled citizens and the number of Americans who self-identify as Native American regardless of citizenship. Even still, census counts have been useful for comparing changes to AIAN population in the past. The changes in AIAN self-identification mentioned above make comparison to previous numbers challenging. The most accurate AIAN data is maintained by the individual tribes but is not available publicly. As such, census population counts are used here.

In 2010, Oklahoma ranked second only to California in the number of self-identified Native Americans with 13.9% of Oklahomans self-identifying as AIAN. In 2020, Oklahoma was overtaken by Texas as the state with the second largest AIAN population. This is not surprising given that the AIAN population grew by 152% in Texas and by only 31.3% in Oklahoma. In fact, there were 42 states whose AIAN population growth rate exceeded Oklahoma's with 22 states experiencing greater than 100% growth. While AIAN growth in other states may be more closely tied to Hispanic growth, the Oklahoma picture is less clear.



Source: US Census Bureau Decennial Redistricting Data PL 94-171
2010 - 2020

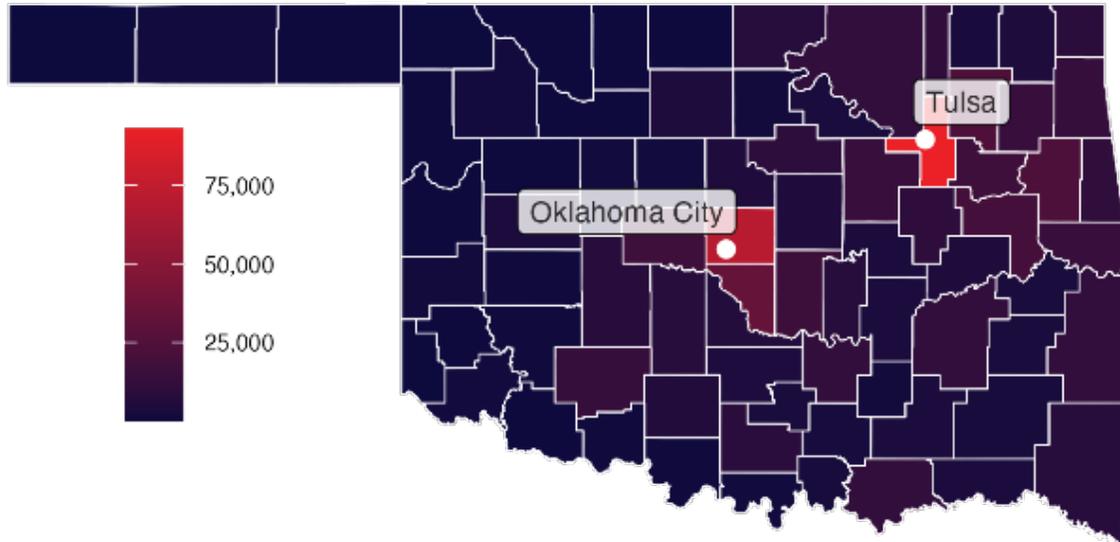
Changes in Oklahoma Population

The total population of Oklahoma grew by 5.5% from 2013 to 2023 (26th in the nation). The graphic below demonstrates the continued rural to urban population redistribution between the two most recent decennial censuses in Oklahoma. Population declined in 50 out of the 77 counties. Most counties in the Oklahoma City and Tulsa metropolitan areas experience growth, while most predominantly rural counties lost population. Canadian County, a suburban county just west of Oklahoma City, continued to lead the state in growth with a 33.6% increase in total population.

The population growth picture is a tale that includes three narratives. First, growth in OKC and Tulsa metro areas is due to agglomeration effects unique to dense areas. Essentially, they are growing because of productivity and amenity effects that exist within cities (i.e., cities provide jobs and things to do) and spread to nearby suburban communities such as those in Canadian County. Second, growth in western and northwestern Oklahoma is due in large part to the location of Oil and Gas activities and the growth of meat packing in Texas County in the panhandle specifically. Lastly, the growth in south central counties is largely due to growth in Tribal Government Gaming and proximity to the large consumer market that extends from Dallas/Fort Worth north to the Oklahoma border.

Geography of the Native Population in Oklahoma

Oklahoma Native American Population by County 2020
Alone or in Combination with Another Race



Source: US Census Bureau Decennial Redistricting Data PL 94-171 for 2020

According to the 2020 Census, 633,831 Oklahomans self-identified as American Indian or Alaska Native Alone or in Combination with One or More Other Races. The AIAN population is shown in the map below, with the red counties having the

most Native Americans and the blue counties having the least.

Just under 50% of the Native American population in Oklahoma resided in the 14 counties that make up the Oklahoma City and Tulsa Metropolitan Statistical Areas (MSAs), with nearly one third living in Oklahoma and Tulsa counties³. The top 3

³ The Oklahoma City MSA includes Canadian, Cleveland, Grady, Lincoln, Logan, McClain, and Oklahoma Counties. The Tulsa MSA includes Creek, Okmulgee, Osage, Pawnee, Rogers, Tulsa, and

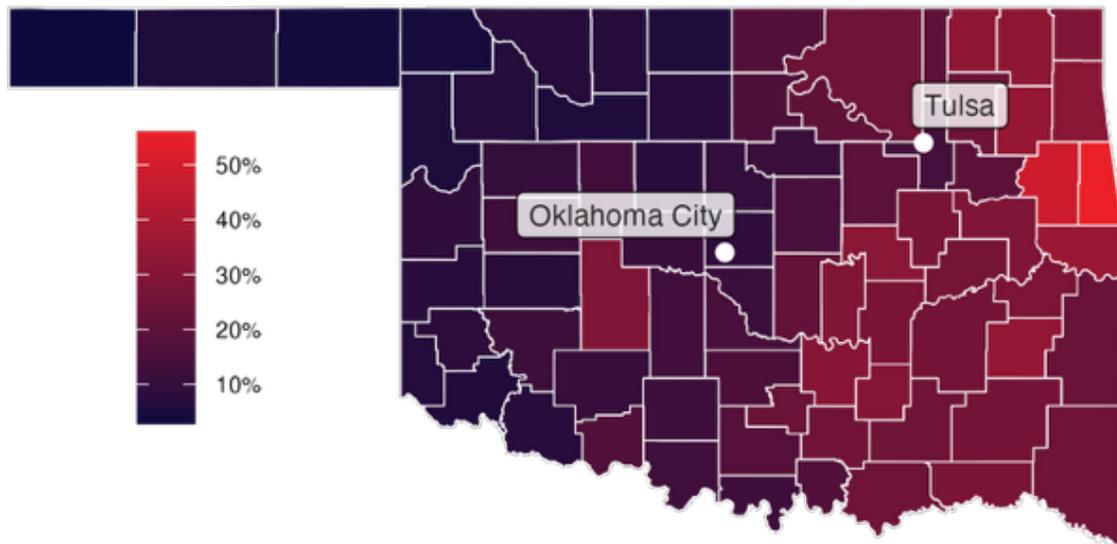
Wagoner Counties. According to the U.S. Decennial Census for 2020, 49.9% of all self-identified Native Americans lived in these 14 counties, while 61.7% of all Oklahomans resided there.

counties by AIAN population were Tulsa (93,127), Oklahoma (70,588), and Cleveland (34,068), all metro counties. The county with the least number of self-identified Native Americans was Cimarron with 64.

The concentration of Native Americans in the metropolitan areas is significant, but still less than the general population of whom 61.7% live in the two MSAs. A more in-depth evaluation reveals the importance of the population of Native Americans in rural counties. The historical geography of Indian

Territory is still apparent in the share of population that is Native American living in the counties of the current reservations and jurisdictional areas. This is most noticeable in the Cherokee Nation Reservation with Adair County Native Americans accounting for 56% of the county population followed by Cherokee County (49%) and other Cherokee Nation counties (Delaware, Mayes, Sequoyah). This is not surprising given the number of Cherokee Nation citizens and non-citizens identifying as Cherokee.

Oklahoma Native American Share of County Population 2020
Alone or in Combination with Another Race



Source: US Census Bureau Decennial Redistricting Data PL 94-171 for 2020

The Diverse and Enduring Impact of Tribal Nations

Short-Run Impacts

The economic impacts that are quantified later in this report represent short-run (1-year) impacts resulting from direct activity from tribes in Oklahoma. They include the current dollar value of direct tribal activity reported by tribes, and the value of subsequent downstream activity from tribal and non-tribal entities triggered by the direct tribal contribution⁴. These impacts were estimated from data collected and imputed for tribal government activity, tribal business activity, and tribal capital projects expenditures⁵.

Tribal Government Activity

Impact from tribal governments derives from the programs and services they provide for tribal citizens and their expenditures incurred for basic government operations. The structure of many tribal governments is like other local, state, and federal governments with executive, legislative, and judicial branches. The operation of these basic government functions generates economic activity like other state and local government operations.

The primary focus of tribes is the long-run welfare of tribal citizens. Tribal governments

use dollars received from federal sources and tribal businesses to provide programs and services that benefit tribal citizens in the pursuit of this objective. These programs include workforce development, housing assistance for low-income citizens, health care, education, and many others. The delivery of these programs serves as another source of economic activity through expenditure, employment, and wages.

Tribal Businesses

Tribes in Oklahoma operate a diverse portfolio of businesses which provide revenue vital for tribal self-determination and long-run stability. For this report, we classified tribal businesses into finance, gaming, manufacturing, professional services, real estate, retail, and other categories. Tribal business activities generate revenue, the majority of which is transferred to tribal governments to support the government activity mentioned above.

The state is brimming with Native American entrepreneurs. Many are inspired or supported by tribal entities created specifically to enhance skills and foster entrepreneurial activity.

Capital Projects

Capital projects include expenditures on new construction, maintenance, and upgrades for existing structures, and

⁴ Short-Run is used here to indicate the reported impacts (output, employment, payroll) do not include any dynamic growth effects from tribal investment in human and physical capital.

⁵ For a more detailed explanation of the methodology used to calculate estimates, see Appendix B: Impact Methodology.

expenditures on equipment. We divided these expenditures into two broad categories: Roads and Other Capital Expenditures.

Enduring Impacts

Tribal economic impacts are inherently more sustainable because Tribal Nations are deeply rooted in their communities through history, culture, and long-standing treaty relationships with the United States. Unlike corporations or other private enterprises

that may relocate operations in search of better tax breaks or short-term incentives, tribes are tied to their lands and people for the long term. Their investments in infrastructure, education, health care, and local economies reflect a multigenerational commitment to place—one that transcends market cycles and political shifts. This enduring presence ensures that the benefits of tribal economic activity are not only substantial but also stable and lasting.

In Focus: Education

Tribes provide significant resources for education programs that benefit tribal citizens and non-tribal Oklahomans, including donations to local school districts and universities, scholarships, and direct payments to the state in the form of gaming exclusivity fees, 88% of which are used for education, benefitting all Oklahoma students. Gaming compacts between tribes and the State require that tribes submit a percentage of their gaming revenues for the right to operate Class III Covered Games in the state. According to the state Office of Management and Enterprise Services (OMES), Oklahoma tribes have remitted over \$2.6 billion in exclusivity fees to the state since 2006, the first year of collections. Collections increased each year, apart from 2014, until 2020 when most facilities closed

for several months due to the COVID-19 pandemic. Exclusivity fee remittances increased appreciably in 2021 with the reopening of facilities. Tribes submitted \$202 million in exclusivity fees to the state in 2023, of which \$177,787,922⁶ were provided to the HB1017 education revolving fund according to OMES.

In addition to exclusivity fees, Oklahoma tribes spent \$133.6 million for tribal education programs and scholarships and provided \$39.3 million in donations to Oklahoma communities and universities to support education programs (see the “Support to Oklahoma Communities” section of the report). When combined with the education portion of exclusivity fees, Oklahoma tribes delivered \$351 million for Oklahoma education programs in 2023⁷.

⁶ *Oklahoma Gaming Compliance Unit, Annual Report 2019*

⁷ *Total support for Oklahoma education = \$177.8 million (HB 1017 funds) + \$133.6 million (tribal*

education expenditures) + \$39.3 million (tribal donations to Oklahoma communities to support education objectives)

In Focus: Tribal Health Care

Tribes provide health care services using federal dollars and internal tribal funds. The primary funding for health care services comes through the Indian Health Service (IHS) and may be delivered fully by IHS or via tribal management with funding provided by IHS.

Indian Health Service (IHS)

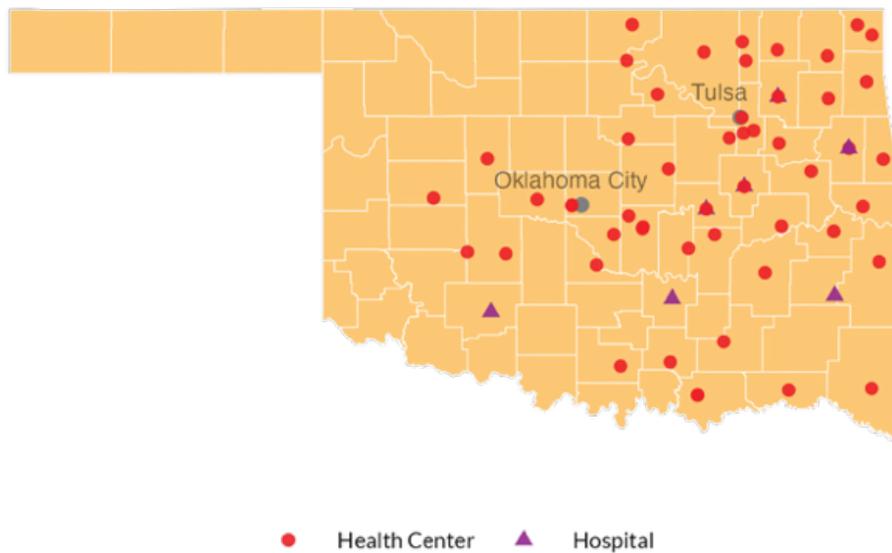
The current Indian Health Service (IHS) was created in 1955 to provide health services to American Indian and Alaska Natives who are citizens of federally recognized tribes. The provision of health services for tribal citizens grew out of government-to-government relationships between the federal government and Indian Tribes established in

1787 and formed by subsequent treaties and Supreme Court decisions.

Eligibility

According to IHS, "American Indians and Alaska Natives are eligible to participate in all public, private, and state health programs available to the general population. In addition, they also have treaty rights to federal health care services through the Department of Health and Human Services. The federal trust responsibility to uphold the treaty responsibility for health care to Indians is accomplished by consulting with Indian Tribes and then actively advocating for policy, legislative, and budgetary

Tribal Health Facilities in Oklahoma



Source: Indian Health Service, Release 2023

planning for Indian health care⁸." Most facilities require individuals to present a Certificate Degree of Indian Blood (CDIB) card for health services⁹. Some facilities will also accept a tribal citizenship card or proof of eligibility for a CDIB card. Health care services may also be extended to non-tribal individuals at tribal-operated health facilities¹⁰. These policies are set by the operating tribe and vary by location.

Facilities

Indian health care facilities are located within Indian Reservations or tribal statistical area boundaries and may be operated directly by IHS or by individual tribes who receive funding from IHS. Most American Indians in the United States reside within urban areas outside of reservations. Nonprofit urban clinics provide services within urban areas to meet the needs of American Indians who live in urban areas. These urban clinics receive limited funding from IHS. Health care facilities include hospitals, ambulatory outpatient facilities, health centers, school health centers, health stations, and alcohol substance abuse treatment facilities. Hospital and Health facilities are pictured in the map below.

In Oklahoma, there are 72 facilities providing care ranging from hospitals to

behavioral health facilities, with 9 facilities operated by IHS, 61 facilities operated by individual tribes, and 2 urban clinics, one each in Oklahoma City and Tulsa. These facilities include hospitals (7), health centers (52), behavioral health and alcohol substance abuse treatment facilities (6), and other service facilities (7). Facilities increased from 65 to 72 from 2019 to 2023, driven by the increase in Tribal Operated Facilities, which now total 61.

Tribes spent \$582 million providing health services to Oklahomans in 2023. They maintained 9,308 jobs, paying \$762 million to Oklahoma workers.

Health Care Visits

The data in the table below report health services provided by thirteen of the participating tribes¹¹. In 2023, the participating tribes recorded 3.6 million unique patient visits with 6.5 million filled prescriptions. The data indicate that 2.1% of services provided and 3.4% of prescriptions filled at tribal health facilities were for non-Indian patients.

Purchased/Referred Care (PRC)

Purchased/Referred Care (PRC) refers to medical or dental services purchased away from IHS or tribal health facilities.

⁸ "Basis for Health Services," Indian Health Service, <https://www.ihs.gov/newsroom/factsheets/basisforhealthservices/>, accessed Feb 26, 2022.

⁹ CDIB cards are issued by the federal Bureau of Indian Affairs. CDIB cards may be held by individuals who are not registered citizens of a federally recognized tribe but who can prove eligibility for citizenship (i.e., most

tribal citizens have CDIB cards but not all CDIB cardholders are tribal citizens).

¹⁰ For example, some tribes provide services for non-tribal employees. Some tribes provided access to COVID-19 vaccines to the broader public.

¹¹ Some tribes do operate health facilities.

The program allows eligible Native Americans to obtain care from providers outside the IHS network in cases where no IHS facility is nearby or when emergency or specialty care is not available at nearby IHS

facilities. Participating tribes reported spending \$51,104,702 for PRC services for 117,232 patients in 2023. These expenditures supported local health care providers throughout the state.

Tribal Health Services by Participating Tribes			
	Native	Non-Native	Total
In-Patient Visits	868,991	5,644	874,635
Out-Patient Visits	2,612,245	67,686	2,679,931
Total Visits	3,481,236	73,330	3,554,566
Prescriptions	6,314,878	220,709	6,535,587

In Focus: Tribal Government Gaming

Indian Gaming Regulatory Act

The U.S. government passed the Indian Gaming Regulatory Act (IGRA) in 1988. The purpose of IGRA was to create a consistent source of revenue for tribes to spend on tribal government priorities for the purpose of improving the welfare of tribes and tribal citizens. As such, the act permitted the use of net revenue from gaming for 5 purposes: to fund tribal government operations or programs, to provide for the general welfare of tribes and tribal citizens, to promote tribal economic development, to donate to charitable organizations, and to help fund operations of local government agencies.

The act established 3 classes of games and defined a different regulator structure for each.

- Class I: Includes social games for prizes of minimal value or traditional forms of Indian gaming connected to tribal ceremonies or celebrations. Regulation of Class I gaming is left to the exclusive jurisdiction of tribes.
- Class II: Includes bingo and similar games such as pull tabs, lotto, instant bingo, and non-banked card games in which players bet against each other rather than against the house. Class II gaming is allowed in states where the state permits such gaming, and the governing body of the tribe adopts an ordinance or resolution which is approved by the

Chairman of the National Indian Gaming Commission (NIGC). Tribes regulate their own Class II activities with oversight by the NIGC.

- Class III: All forms of gaming not included in classes I or II. Frequently called “Vegas-style” gaming because it includes games of chance played at casinos (slot machines, blackjack, poker, and other casino games) that allow wagers or significant prizes.

Regulatory roles are dictated in each individual tribal-state compact.

Tribal Government Gaming in Oklahoma

Oklahoma tribes operated gaming facilities that offered bingo and similar games and had the ability to operate off-track simulcasting wagers through Off-Track Wagering Compacts for several years, but it wasn't until 2004 when Oklahoma voters approved the State-Tribal Gaming Act, that they were offered a compact to operate a wider array of Class III Covered Games in the state. The act provided a model compact offer which laid out the specific terms for operation of Class III gaming activities in the state. Tribes wanting to offer these Class III games accepted the model compact offer and applied for approval from the Department of Interior. Many tribes signed the model compact and began operating Class III facilities by 2006. Thirty-three of

the 35 compacted tribes were operating 136 facilities in the state in 2023¹².

Tribal casinos in Oklahoma operate a combination of Nonhouse-Banked games, Class III electronic games, and Class II games. Legislative action in 2018 extended the offer to include “ball and dice” games.

In exchange for the right to operate Class III Covered Games in tribal areas, the compacts require tribes to remit exclusivity fees monthly from the operation of compacted games to the state¹³. By statute, the first \$250,000 of annual fee collections are routed to the Oklahoma Department of Mental Health and Substance Abuse. Of the remaining funds, 88% go to the HB 1017 Revolving Education Fund to support state education priorities and the remaining 12% are distributed to the state’s general revenue fund (Class II revenues are excluded from exclusivity fees).

There were 33 tribes operating 136 gaming facilities by the end of FY 2023 according to the Oklahoma Office of Management and Enterprise Services (OMES)¹⁴. According to OMES, tribes operated an average of 45,757 Class III machines in 2023.

¹² See *Oklahoma Gaming Compliance Unit Annual Report, Fiscal Year 2023*, Oklahoma Office of Management and Enterprise Services, <https://oklahoma.gov/content/dam/ok/en/omes/documents/GameCompAnnReport2023.pdf>.

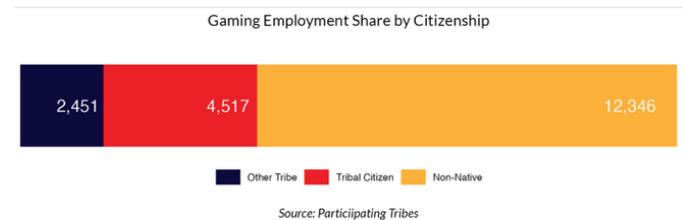
¹³ Fees are calculated as follows:

Electronic Covered Games

- 4% of first \$10 million of AGR
- 5% of next \$10 million of AGR
- 6% of AGR over \$20 million

Table Games

Gaming and related activity generated revenues of over \$7.4 billion, a 27% increase since 2019. Gaming and related operations maintained 24,900 jobs paying \$1.2 billion in wages and benefits to Oklahoma workers in 2023. The largest share of workers (64%) were not citizens of any tribe, with 23% being tribal citizens and 13% being citizens of another federally recognized tribe. This share of Non-Native employees represents the largest share in recent years. Data collected for previous studies have shown that up to 60% of workers were not tribal citizens (Dean and Robinson 2015) and (Dean and Robinson 2016).



Adjusted Gross Gaming Revenue (AGR) refers to the total revenue earned from gaming less monies paid out in prizes. AGR was estimated to be just over \$4 billion in 2014 (Dean and Robinson 2015) with revenue from gaming and all related activities¹⁵ totaling \$4.3 billion. In 2023, AGR

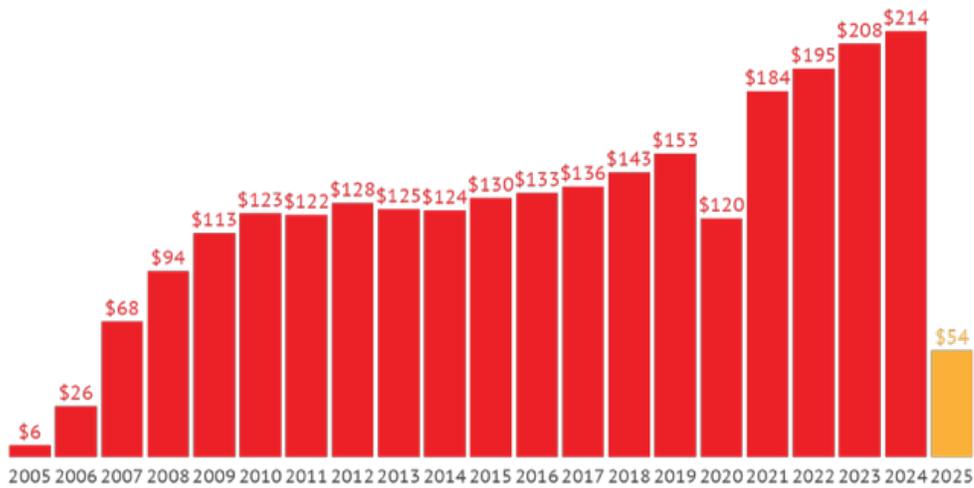
- 10% of monthly net win

Source: Oklahoma Office of Management and Enterprise Services

¹⁴ See *Oklahoma Gaming Compliance Unit Annual Report 2019*.

¹⁵ Gaming and related revenues include Adjusted Gross Gaming Revenue, and Food and Beverage, Hotel, Retail, Entertainment, Golf, RV Park, Horse Racing, Convenience Store, and Other revenues related to casino operations.

Annual Exclusivity Fees Through March 2025
(Millions of US Dollars by Fiscal Year)



Source: [data.ok.gov/Tribal Gaming Exclusivity Fees \(2006 - Present\)](https://data.ok.gov/Tribal%20Gaming%20Exclusivity%20Fees)

increased to \$6.1 billion, while revenue from all gaming and related activities increased to \$7.4 billion, up 85% since 2014.

While we don't have estimates for AGR for all years, we can see the increasing significance of compacted gaming by reviewing the growth of exclusivity fee collections since the beginning of compacted gaming in the state in 2006. Fee collections increased consistently with exceptions in years 2014 and 2020. The decrease in 2020 was directly tied to casino closures related to the COVID-19 pandemic.

Collections have increased every year since casinos reopened after the COVID-19 pandemic. As of March 2025, tribes have

provided \$2.6 billion in exclusivity fees to support state education funding priorities.

The Success of IGRA in Oklahoma

States began working with tribal nations shortly after the passage of IGRA in 1988. By 1995, gross revenue from Indian gaming nationwide was \$54.6 million, a full 11 years before Oklahoma, the former Indian Territory, would offer a compact agreement to the tribal nations in the state¹⁶.

Oklahomans emphatically demonstrated their preference for tribal gaming in 2004, with over 60% of them voting in favor of passage of the Oklahoma State-Tribal Gaming Act. They have continually revealed their demand in the years since its passage,

¹⁶ Source: "The Encyclopedia of Oklahoma History and Culture," Gaming, Indian, Oklahoma Historical Society,

<https://www.okhistory.org/publications/enc/entry.php?entry=GA007>.

fueling the significant growth in revenues evidenced in the exclusivity fee collections. So much so, that by 2023, Oklahoma ranked third in the U.S. in gaming revenues with collections representing 16% of the U.S. total¹⁷.

It wasn't only Oklahomans fueling the growth in gaming. The industry is now a significant exporter of entertainment to surrounding states, attracting dollars to especially rural areas in Oklahoma. According to the data collected for the previous version of his report, 34% of all visits to Oklahoma properties in 2019 came from outside the state. This suggests that more than one third of the benefits of tribal gaming received by Oklahomans are funded by people living outside the state.

The benefits to Oklahomans include the economic contributions and charitable donations to the state and local communities, the increased employment opportunities for Oklahoma workers, the increased exclusivity fee collections used for education, and the increased tax base resulting from increased income by citizens and businesses who are directly or indirectly linked to tribal gaming activities.

All the benefits from tribal gaming in Oklahoma demonstrate the success of IGRA

and its implementation by the state and tribal leaders. Resources earned by tribes have been used directly in accordance with the purposes stated in IGRA. In 2023, tribes spent \$2.4 billion to fund tribal government programs, services, and operations¹⁸, and \$1.3 billion to provide health care services to citizens, and in some cases, Oklahomans who were not tribal citizens. The tribes sent \$208 million¹⁹ to the state in exclusivity fees – a 36% increase over fees paid in 2019. Remaining revenue was used to fund gaming operations and other business/economic development opportunities, and to provide grants to local communities and universities. All revenue uses align with IGRA's funding priorities and have produced benefits that extend to all Oklahomans.

Support to Oklahoma Communities

Tribes provide dollars directly to local communities to support community projects/goals. Such payments include donations to local school districts and other local governments supporting primary and secondary schools, Oklahoma universities, local health and wellness and cultural programs, and many others. The table below highlights a summary of these contributions by the tribes who participated

¹⁷ According to the National Indian Gaming Commission (NIGC), revenues from the Tulsa Region which incorporates eastern Oklahoma and Kansas were \$3,560,275,433 and revenues from the Oklahoma City Region which incorporates the rest of Oklahoma and Texas were \$3,216,288,977. The combined total of

\$6,776,564,410 represented 16% of nationwide revenues of \$41,905,347,538.

¹⁸ Includes \$1.5 billion in expenditures and \$946 million in government payroll.

¹⁹ All data provided by OMES. Annual amounts may differ slightly from OMES Annual Reports due to calendar vs. fiscal year differences.

in this study. As such, the true contribution of Oklahoma tribes is larger than the amount reported here.

Total Contributions to State and Local Communities			
	Governments	Other Philanthropic	Total
Education	\$39,313,699		\$39,313,699
Governments	\$26,341,007		\$26,341,007
Health and Wellness	\$3,519,571	\$621,280	\$4,140,851
History and Culture	\$1,643,362	\$555,000	\$2,198,362
Other Community	\$56,947,084	\$18,415,324	\$75,362,408
Total	\$127,764,722	\$19,591,604	\$147,356,326

Economic Impact

Economic impacts include the direct employment, wage, and output (revenue/expenditure) contribution of tribal activity throughout the state and multiplier effects from trade with downstream industries and household expenditures due to increased household income throughout the value chain.

Direct Contribution of Tribes in Oklahoma

The direct contribution of any entity refers to its direct revenues (and/or expenditures for tribes), the wages and benefits it pays to workers, and the number of jobs maintained directly by the entity. For the purpose of impact estimation, the direct output (production) of tribal activity includes their business revenues, government expenditures, and expenditures for capital improvements including roads projects. Direct Employment refers to the number of jobs maintained by tribal businesses and tribal governments in Oklahoma communities. Total wages and benefits refer to the total compensation of workers filling these jobs who live within the borders of the state. Some jobs are filled by out-of-state workers, but their income is spent within their communities outside the state, so their

wages and benefits are not included in this analysis. We can interpret the direct contribution of tribes as the direct production of economic output, the direct number of jobs maintained in Oklahoma communities, and the direct compensation paid to Oklahoma residents.

Direct contribution refers to the direct employment, payroll, and output of Oklahoma tribes inside the Oklahoma economy. Employment includes all business and government jobs as estimated by the average number of employees for each entity during the year. Payroll includes all business and government wages and benefits provided to workers who reside within the state.

Output includes the total of tribal business revenues and expenditures by tribal governments. Tribes also directly contribute to the economy through their expenditures on new capital projects as well as road construction and maintenance. Capital expenditure varies by year depending on tribal improvement schedules, so caution is advised when comparing capital expenditure (including roads) for specific years. The direct contribution data is summarized in the table below. These numbers serve as the direct inputs into the economic impact model.

Direct Contribution Estimates for all Tribes in Oklahoma ²⁰				
	Government	Business	Capital Projects	Total
Employment	23,475	32,185		55,659
Wages and Benefits	\$1,707,985,707	\$1,599,725,996		\$3,307,711,703
Business Revenues		\$9,815,744,920		\$9,815,744,920
Government Expenditures	\$2,034,122,690			\$2,034,122,690
Roads Expenditures			\$69,017,566	\$69,017,566
Other Capital Expenditures			\$758,893,126	\$758,893,126

Total Economic Impact

The impacts reported below include the direct tribal contribution discussed previously, and the economic activity generated by governments, households, and businesses in response to tribal production. These additional impacts are referenced as the “Multiplier Effect” in the table. These multiplier effects include the additional production, employment, and

compensation generated by Oklahoma companies in response to the demand for their goods and services by tribal activities. It also includes the additional impacts by households and governments receiving income through wages and who produce products and services purchased by tribes. Tribes supported significant economic activity within the state of Oklahoma in 2023.

Total Economic Impacts from Tribes in Oklahoma in 2023				
	Employment	Payroll	Value Added	Output
Direct Effect	55,659	\$3,307,711,703	\$5,372,199,998	\$12,677,778,302
Multiplier Effect	84,201	\$4,522,053,849	\$6,944,637,851	\$10,762,157,061
Total Effect	139,860	\$7,829,765,552	\$12,316,837,849	\$23,439,935,364

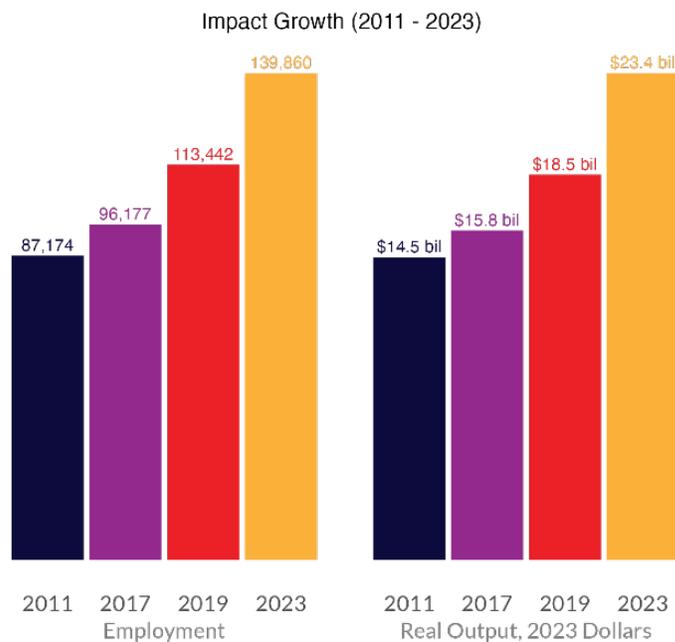
²⁰ For this table, Government = Government + Healthcare and Business = Business + Gaming

Comparison of Impacts from previous All-Tribe Economic Impact Reports

This is the third impact report to estimate the economic impact of all tribal activities in Oklahoma. The first report was published in 2012, using 2011 data. The second was published in 2019, using 2017 data, with the third being published in 2022 using 2019 data. The current report uses 2023 data. Here we present a comparison of the current impacts with those reported in the two previous reports. These changes should not be viewed as exact, rather they present evidence of the growth of tribal impact.

Employment supported by tribal activities increased by 60% since the original study in 2012, while real output²¹ increased by 61% from 2011 to 2023.

By comparison, the state of Oklahoma experienced an 11.4% increase in total employment²² and a 27% increase in Real Gross State Product²³ over the same period. The large increases in employment and output impacts relative to changes in the Oklahoma economy overall, demonstrate the increasing importance of tribes as drivers of economic growth in Oklahoma.



²¹ Reported Output Impacts for each year (\$10.8, \$12.9, \$15.6, and \$23.4 billion) were converted to real values (\$14.5, \$15.8, 18.5, and \$23.4 billion in 2023 dollars) using the GDP Deflator for each year (base = 2017).

²² U.S. Bureau of Labor Statistics, All Employees: Total Nonfarm in Oklahoma [OKNA], retrieved from FRED,

Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/OKNA>, May 21, 2025.

²³ U.S. Bureau of Economic Analysis, Real Gross Domestic Product: All Industry Total in Oklahoma [OKRQGSP], retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/OKRQGSP>, May 21, 2025.

Oklahoma Fiscal Impacts

Tribal activities generated significant revenues for Oklahoma state and local governments in 2023. IMPLAN²⁴ software generates estimates of fiscal collections at every level of government from workers, households, and corporations resulting from the entirety of economic activity (direct and multiplier) generated from the initial direct contributions in the impact model. The

estimated fiscal impacts of Oklahoma tribal nations are summarized in the table below. Combining fiscal impact estimates generated by the model with the exclusivity fees paid by tribes, we estimated payments to Oklahoma governments totaled just under \$813 million. Note: The numbers reported here do not include federal government collections as they are not germane to this study.

Fiscal Impacts	
Household Income, Property, and other Taxes and Fees	\$ 118,718,247
Corporate Income and Production Taxes	\$ 487,215,898
Gaming Exclusivity Fees	\$ 208,028,639
Total Estimated Fiscal Impacts	\$ 813,962,784

²⁴ IMPLAN is a nationally recognized vendor of impact multipliers and software. IMPLAN Group LLC, 16905 NorthCross Drive, Suite 120, Huntersville, NC 28078

Appendix A: Federally Recognized Tribes in Oklahoma

Absentee-Shawnee Tribe of Indians of Oklahoma *

Alabama-Quassarte Tribal Town

Apache Tribe of Oklahoma

Caddo Nation of Oklahoma

Cherokee Nation **

Chickasaw Nation **

Cheyenne and Arapaho Tribes **

Choctaw Nation of Oklahoma **

Citizen Potawatomi Nation **

Comanche Nation

Delaware Nation *

Delaware Tribe of Indians

Eastern Shawnee Tribe of Oklahoma **

Fort Sill Apache Tribe of Oklahoma **

Iowa Tribe of Oklahoma *

Kaw Nation **

Kialegee Tribal Town

Kickapoo Tribe of Oklahoma *

Kiowa Tribe *

Miami Tribe of Oklahoma

Modoc Tribe of Oklahoma

Muscogee Nation **

Osage Nation *

Otoe-Missouria Tribe of Indians

Ottawa Tribe of Oklahoma

Pawnee Nation of Oklahoma *

Peoria Tribe of Indians of Oklahoma

Ponca Tribe of Indians of Oklahoma

Quapaw Nation *

Sac & Fox Nation

Seminole Nation of Oklahoma

Seneca-Cayuga Tribe of Oklahoma +

Shawnee Tribe *

Thlopthlocco Tribal Town

Tonkawa Tribe of Indians of Oklahoma

United Keetoowah Band of Cherokee Indians in Oklahoma

Wichita and Affiliated Tribes +

Wyandotte Nation *

* Indicates Participating Tribe 2025

+ Indicates Participating Tribe in 2022

** Indicates Tribe who Participated in 2022 and 2025

Appendix B: Impact Methodology

Impact Estimation

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 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 impacts that result from tribal government, business, health care, gaming, and construction activities. The downstream expenditures include production by related industries, governments, and households. When totaled, these direct (tribal) and multiplier (downstream industries + expenditure from households) activities provide a complete picture of the total impact.

A model was created for the state of Oklahoma for use in the estimation phase. Tribal data was collected from individual tribes and aggregated into tribal direct inputs. Because this report includes data from 19 of the 38 tribes, additional tribal government, business, health care, and gaming activities were estimated for the remaining tribes in Oklahoma to complete

the data inputs for use in the Oklahoma model. All reported impacts occur at the state level.

Tribal government impacts were derived from direct government expenditures, employment, and payroll. These impacts were added to business impacts derived from business revenues, employment, and payroll, health care expenditures, employment, and payroll, gaming revenue, employment, and payroll, and capital expenditures for one-time roads and other construction projects to provide a complete estimate of the impacts of all tribal activities in the state. Construction impacts are transient, occurring only once, while the other impacts occur annually. As a result, some of the variance of impacts across years can be explained as variation in roads and other capital projects expenditures.

The methodology employed in this report is designed to estimate the contribution of (mostly) existing activities to the local economy²⁵. The approach begins with a static description of expenditure flows between households and industries, capturing the reliance of one industry’s output on other, supporting industries. For example, by examining the expenditures from the construction industry to the wholesale lumber industry we can derive an estimate of the reliance of the construction sector on wholesale lumber output.

²⁵ *In fact, while reports of this nature are commonly referred to as ‘impact analyses,’ they are more correctly characterized as ‘contribution analyses’*

From these frozen-in-time expenditure flows, we can derive economic multipliers specific to each industry. These multipliers estimate the combined, or total economic impact originating from an initial expenditure (or revenue) from Oklahoma tribes. Multipliers for employment and wages and benefits are derived similarly.

This approach is valuable as it provides rich information at a relatively low computational cost. However, the methodology does invoke some restrictive assumptions, including constant prices and a fixed production process, and should not be confused with a computationally higher cost economic forecast.

Tribal Data Overview

The calculation of impacts relies on quality data inputs. Every effort was made to obtain a complete, aggregated dataset of all Oklahoma tribal production, employment, wages and benefits, and other information for this study. We used a data collection survey which was completed by 19 of the 38 Oklahoma tribes.

The provided survey asked tribes to describe their production activities for several pre-defined categories (see below). Tribes used internal financial and human resource records to complete revenue, expenditure, employment, and wages and benefits totals for the various categories. The results from each tribal survey were combined to form an aggregate sample²⁶.

We imputed data for non-participating tribes using publicly available data in combination with averages or other measures derived from the aggregate participant sample.

Data Disclaimer

The data provided to Economic Impact Group, LLC. by the individual tribes include private financial, employment, and operations data. Report results are derived from the provided data without audit by the report provider. The accuracy or reliability of the data or results is not guaranteed or warranted in any way. We disclaim liability of any kind whatsoever, including, without limitation, liability for quality, performance, merchantability and fitness for a particular purpose arising out of the use, or inability to use the data.

Production Categories			
Government	Business	Capital Expenditures	Other
Social Services	Finance	Roads	Healthcare
History and Culture	Real Estate	Other Capex	Gaming
Housing	Professional Services		
Education	Manufacturing		
Government Operations	Retail		
Other Gov	Other Bus		

²⁶ Individual tribe data is proprietary and therefore not releasable to the public.

Appendix C: Glossary of Terms

Direct Impact

Direct Impact refers to the direct contribution of tribal activity to the state of Oklahoma. For this study, direct impact includes Business Revenues, Employment, and Wages and Benefits and Government Expenditures, Employment, and Wages and Benefits.

Multiplier Impact

Economic impact includes the direct contribution of tribes (Direct Impact) and the additional economic activity that is generated in support of this direct contribution. Multiplier Impact refers to this additional activity and includes revenues and subsequent expenditures of businesses from whom tribes purchase goods and services. Also included are the additional employment and wages and benefits created by downstream businesses as well as business activity resulting from worker income spent within the state.

Employment

In the context of this report, employment refers to the number of jobs or positions necessary to support tribal activity and the production of downstream industries that supports tribal activity. It is not a count of total employees as multiple employees may fill a single job during a year if one

employee leaves employment and is replaced by another individual.

Input-Output Models

Models that estimate economic linkages between industries, households, governments, and trade based upon known or estimated flows of dollars throughout an economy. IMPLAN models estimate the linkages using publicly available data on production, employment, wages, household income, government revenue and expenditure, and other dollar flows for a specific region. All linkages and estimates in this report are for the state of Oklahoma unless stated otherwise.

Output

Output is an estimate of the value of production for a given activity in each region. In this report, output refers to value of all goods and services produced directly by tribes or indirectly by downstream industries. It differs from GDP in that it includes the value of all goods and services produced, including intermediate goods used in the production of final goods which can result in double counting in some cases.

Wages and Benefits/Payroll

The term Payroll is synonymous with the phrase Wages and Benefits in this report. Both refer to the total expenditure of tribes on wages, salaries, and associated benefits for workers who live within the state of Oklahoma. Wages and Benefits paid to

employees who live in adjoining states do not count toward this total.

Value Added

Value Added is like output in that it measures the value of production. Unlike output, it avoids double counting by summing only the added value of production at each phase of the production process. The total value added will sum to the value of the final good produced and thus is comparable to traditional measures of GDP.

To understand the value of tribal production within the state, compare Value Added to Oklahoma GDP.

Appendix D: References

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Tribal Government Gaming." Oklahoma Indian Gaming Association. <https://oiga.org/wp-content/uploads/2018/01/OIGA-2015-Annual-Impact-Report-singlepg2.pdf>.

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Thank you to our participating tribes!

