



THE ECONOMIC IMPACT OF TRIBAL GAMING IN ARIZONA, 2014

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FINDINGS AT A GLANCE

The report that follows describes the economic impact of tribal gaming in Arizona in 2014. Among its core findings are the following:

- Sixteen of the twenty-two federally recognized Indian tribes in Arizona operate 23 casinos pursuant to state-tribal compacts governed by the Indian Gaming Regulatory Act of 1988. Five more tribes signed compacts with Arizona but do not operate casinos, instead leasing slot machine rights to tribes with casinos in larger markets.
- Statewide, tribal gaming operations employed nearly 15,000 Arizonans, a majority of whom are non-Indians. This employment ranks above McDonald's and below Wells Fargo's Arizona employment.
- Tribal gaming revenues fund tribal programs and investments in non-gaming economic diversification, both of which employ additional Arizonans—many thousands more.
- Reservation economies are generally incapable of supplying all their needs for input goods, services, and labor. When tribal casinos, non-gaming tribal enterprises, and tribal governments purchased and hired in 2014, they generated more than \$2.5 billion in estimated gross state product, including \$1.6 billion in labor income and \$271 million in state and federal taxes other than income taxes.
- Tribal gaming does not rely on tax abatements for its success. To the contrary, tribes reimburse Arizona for regulatory costs, contribute to Arizona problem gambling reduction, and make contributions to local governments to mitigate gaming impacts (among other things). In addition, tribal revenue underwrites statewide instructional improvements in schools, trauma and emergency care, tourism promotion, and wildlife conservation. These contributions totaled \$1.1 billion since fiscal year 2004, and amounted to \$97.8 million in fiscal year 2014.
- The structure of tribal gaming produces net economic benefits for Arizona because, in addition to helping Arizona stay competitive in interstate tourism, casinos develop reservation and rural economies as destination facilities and by supporting intertribal transfers that would not happen otherwise.

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I. INTRODUCTION

Tribal gaming in Arizona is a powerful economic engine for the Indian governments that own and operate 23 casinos, for Arizona generally, and for rural Arizona, in particular. Indian casinos are an outgrowth of the single most effective approach for improving reservation economies—tribal sovereignty—but by intergovernmental agreement with Arizona, tribes ensure that Arizona taxpayers are not burdened by tribal gaming. In contrast to the abatements so commonly used to recruit and retain business, Indian gaming depends upon no tax advantage for its success. In addition, tribes compensate state, city, town, and county governments for regulatory, infrastructural, and other costs and contribute additional funds to statewide educational improvement, trauma and emergency care, tourism promotion, and wildlife conservation—to the tune of \$1.1 billion dollars since fiscal year 2004.

What's more, tribal gaming provides benefits to the state economy. Indian casinos employ 15,000 Arizonans—a majority of whom are non-Indian—and purchase the vast preponderance of goods and services from off the reservations. Tribal gaming revenues directly fund tribal program innovations aimed at decades-old backlogs of educational, health, and other deficits. Tribal gaming also helps underwrite investments in diversified reservation economies. Before gaming, both social and economic investments were chronically underfunded, though desperately needed.

Arizonans can rest assured that these are net economic benefits, not just transfers from one pocket to another. Tribal gaming helps recapture out-of-state tourism by Arizonans and directly makes the state more attractive to out-of-state visitors—via investments in the Native character of Arizona and via \$70 million in contributions to the state's Tourism Fund over more than a decade. More importantly, tribal gaming serves as a key foundation of American Indian economic self-sufficiency. When Arizona makes better use of its human and physical resources on the reservations, the state economy unambiguously benefits.

Economic benefits are particularly pronounced in rural Arizona, which has gained destination businesses—casinos in Pinetop, Yuma, and Payson, for example—that might not otherwise be there. In many such locations, tribal employers rank among the top regional employers. Rural Arizona also benefits from intertribal transfers of gaming device allocations that have the practical effect of bolstering the budgets of remote, rural tribes like Hualapai and Havasupai with revenues from Phoenix and Tucson operations—even though those tribes are too far from populations to sustain operations.

As the following report makes clear, it is the tribal nature and compacted structure of Indian gaming in Arizona that creates and intensifies economic impacts. Tribal governments must own the casinos, so unlike private corporations whose owners invest or spend profits wherever in the global economy they see fit, Arizona's tribes spend Indian gaming revenue locally. Likewise, tribes will not threaten to take operations out of state. To the contrary, the history of Indian gaming in Arizona demonstrates a mutually beneficial relationship between tribes and the state. It is a relationship whose current structure promises to yield benefits well into the future.

In Arizona there are 22 federally recognized Indian Tribes, 16 of which operate 23 Las Vegas-style casinos, known as Class III operations under the terms of the Indian Gaming Regulatory Act.

The flexible structure of tribal gaming in Arizona helps rural reservations and their neighboring economies reap the benefits of Phoenix and Tucson casinos.

The payments made possible by these leases transfer tribal revenues that would not otherwise reach rural reservation communities and economies, and in turn, spill over into the off-reservation economies that supply tribes with workers, goods, and services.

II. THE STRUCTURE OF TRIBAL GAMING

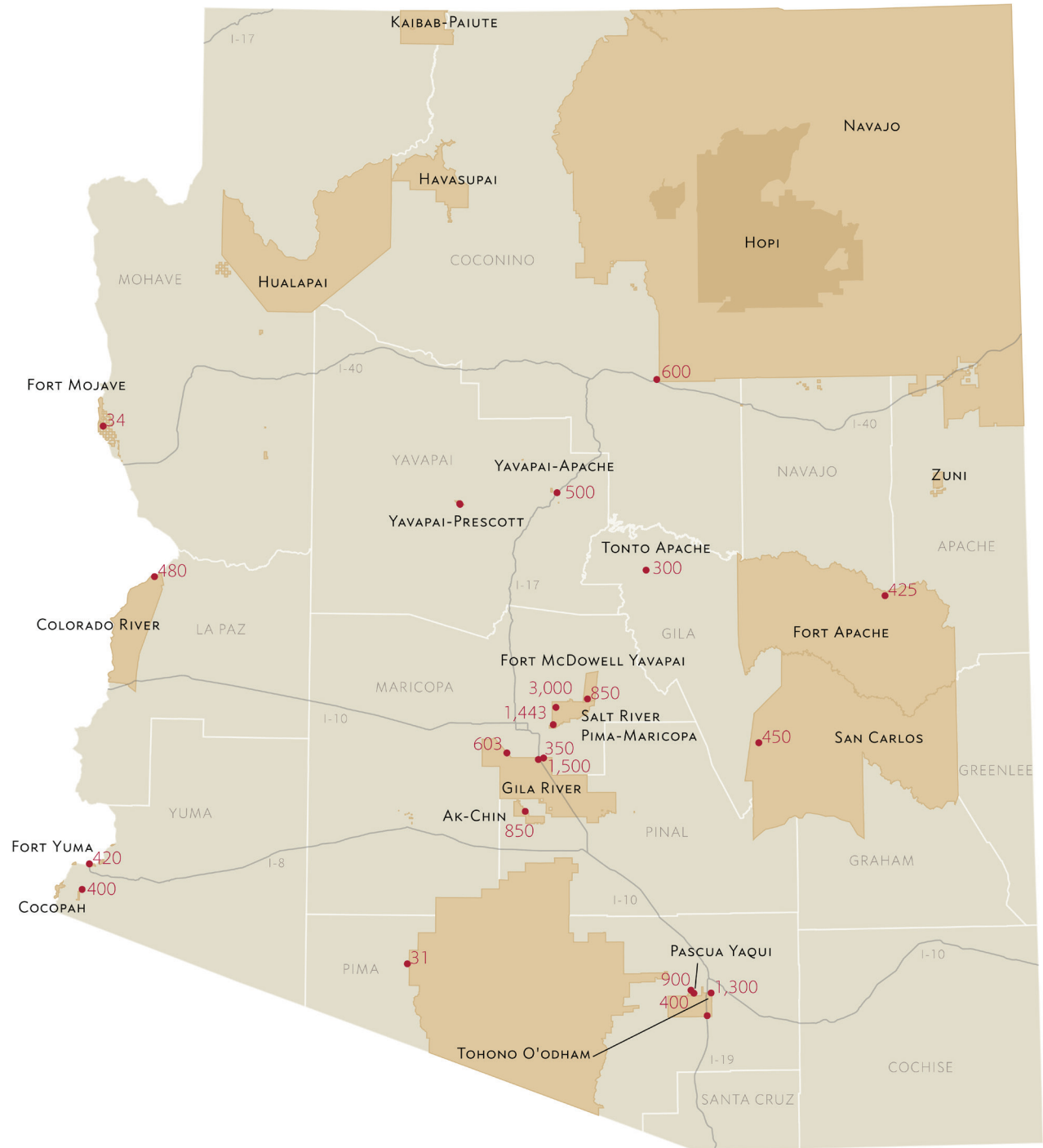
In Arizona there are 22 federally recognized Indian tribes, 16 of which operate 23 Las Vegas-style casinos, known as Class III operations under the terms of the Indian Gaming Regulatory Act of 1988 (IGRA). Five tribes have signed compacts with Arizona but do not operate casinos. Instead, they lease slot machine rights to tribes with casinos in larger markets [1]. One tribe, the Hopi Tribe, has not signed a compact with the State of Arizona and neither operates a casino nor leases device rights.

History, law, and the structure of the tribal-state compacts constrain gaming in Arizona and make it a vehicle for rural economic development in Arizona. The processes of European settlement and reservation formation determined where Indian lands are today relative to Arizona's population centers in Phoenix and Tucson. The Indian Gaming Regulatory Act requires that tribal gaming take place on Indian lands. Thus, while some Indian casinos are near large markets in Scottsdale, Chandler, and Tucson, many are not, and they support employment in rural areas of the state (see Figure 1).

The tribal-state compacts limit the number of machines each tribe may have in a manner correlated to population (top of Table 1). Tribes that do not use their full allocation are allowed lease or sell unused device allocations to other tribes that have better market opportunities. Some tribes have signed the compacts but do not operate casinos (bottom of Table 1). They are also allowed to lease device rights to tribes in larger markets. The payments made possible by these leases transfer tribal revenues that would not otherwise reach rural reservation communities and economies, and in turn, spill over into the off-reservation economies that supply tribes with workers, goods, and services.

Finally, the compacts restrict gaming to 18,158 electronic gaming devices statewide. As of July 2015, only 15,303 were deployed, or 84% of the maximum (Table 1). The compacts also cap the number of Class III electronic gaming devices (slot machines) per casino (1,301) and the number of card tables each individual tribe may have [2]. While the constraints on tribal gaming help Arizona advance a policy of limited gaming (approved by voters in Proposition 202 in 2002), the flexible structure of tribal gaming in Arizona helps rural reservations and their neighboring economies reap the benefits of Phoenix and Tucson casinos.

FIGURE 1
Tribal Gaming Jobs are Distributed Across Arizona
 2014 employment



Not shown: San Juan Southern Paiute. [4]

Benefiting Arizona

In the dozen years since the Arizona tribes signed new gaming compacts with Arizona, they have directly shared more than \$1.1 billion dollars with their fellow Arizonans under the terms of those compacts.

These sidebars explain the compacts' requirements and illustrate a few of the many ways the contributions have underwritten investments in education, trauma care and emergency services, wildlife conservation, tourism promotion, treatment and prevention of problem gambling, and gaming regulation. Of course, tribes do much more for Arizona above what the compacts require. On top of the economic impacts that are the focus of this report are a myriad other charitable contributions and investments, some of which are highlighted in these sidebars too.



TABLE 1

Compacted Device Allocations and Maximum Transfers*gaming devices 2008–2013*

	Max		Actual 7/1/15	Actual % of Total
	Tribal Allocation	Allowable Transfer		
Tribes with Casinos				
Ak-Chin Indian Community	566	523	1,089	100%
Cocopah Indian Tribe	566	170	736	69%
Colorado River Indian Tribes	566	370	936	56%
Fort McDowell Yavapai Nation	566	523	1,089	79%
Fort Mojave Indian Tribe	566	370	936	17%
Gila River Indian Community	1,666	1,020	2,686	100%
Navajo Nation	2,856	-	2,856	38%
Pascua Yaqui Tribe	1,071	670	1,741	78%
Quechan Indian Nation	566	370	936	48%
Salt River Pima-Maricopa Indian Community	833	830	1,663	100%
San Carlos Apache Tribe	1,071	230	1,301	46%
Tohono O'odham Nation	1,666	1,020	2,686	68%
Tonto Apache Tribe	566	170	736	57%
White Mountain Apache Tribe	1,071	40	1,111	74%
Yavapai-Apache Nation	566	370	936	70%
Yavapai-Prescott Indian Tribe	566	370	936	60%
	15,328	7,046	15,303	
Non-gaming Tribes				
Havasupai Tribe	566			
Hualapai Tribe	566			
Kaibab Band of Paiute Indians	566			
San Juan Southern Paiute Tribe	566			
Zuni Tribe	566			
	2,830			
ARIZONA TOTAL ALLOCATION	18,158			$15,303 \div 18,158 = 84\%$

[2,3]

The compacts make possible a substantial amount of investment such that, as of 2014, tribal gaming had grown to more than two million square feet of gaming space in 22 facilities. Accompanying these facilities were nearly 3,300 hotel rooms and nearly 100 restaurants. Statewide, these facilities employed about 15,000 people directly. Unsurprisingly, large numbers of the jobs were in Maricopa and Pima counties, but tribal gaming also employs hundreds of Arizonans in rural areas from La Paz and Yuma counties to Gila and Navajo (Table 2).

TABLE 2

Characteristics of Indian Gaming in Arizona

2014

	Gaming Machines	Table Games	Poker Tables	Total Positions	Bingo Seats	Square Feet	Hotel Rooms	Restau- rants	Jobs
COCONINO COUNTY									
Navajo Nation									
<i>Twin Arrows Navajo Casino Resort</i>	1,089	17	18	1,334	160	267,000	200	5	600
GILA COUNTY									
San Carlos Apache Tribe									
<i>Apache Gold Casino Resort</i>	619	3	3	661	1,000	60,000	146	2	450
Tonto Apache Tribe									
<i>Mazatzal Casino</i>	425	5	3	481	280	38,000	40	4	300
LA PAZ COUNTY									
Colorado River Indian Tribes									
<i>BlueWater Resort & Casino</i>	523	7	5	607	350	30,000	200	8	480
MARICOPA COUNTY									
Fort McDowell Yavapai Nation									
<i>Fort McDowell Casino</i>	906	13	15	1,102	1,700	150,000	246	6	850
Gila River Indian Community									
<i>Lone Butte Casino</i>	786	15	6	933	750	120,000	0	6	350
<i>Vee Quiva Hotel and Casino</i>	950	26	26	1,314	550	70,000	332	2	603
<i>Wild Horse Pass Hotel & Casino</i>	950	31	34	1,405	0	100,000	242	0	1,500
subtotal	2,686	72	66	3,652	1,300	290,000	574	8	2,453
Salt River Pima-Maricopa Indian Community									
<i>Casino Arizona</i>	919	36	8	1,227	1,000	100,000	0	6	1,443
<i>Talking Stick Resort</i>	744	51	55	1,486	0	240,000	496	5	3,000
subtotal	1,663	87	63	2,713	1,000	340,000	496	11	4,443
MOHAVE COUNTY									
Fort Mojave Indian Tribe									
<i>Spirit Mountain Casino Mohave Valley</i>	247	0	0	247	0	9,500	0	1	34
NAVAJO COUNTY									
White Mountain Apache Tribe									
<i>Hon-Dah Resort Casino</i>	844	0	4	872	0	18,600	388	2	425
PIMA COUNTY									
Pascua Yaqui Tribe									
<i>Casino Del Sol Resort</i>	1,085	0	0	1,085	694	240,000	215	10	900
<i>Casino of the Sun</i>	298	0	0	298	600	50,000	0	5	400
subtotal	1,383	0	0	1,383	1,294	290,000	215	15	1,300
Tohono O'odham Nation									
<i>Desert Diamond Casinos & Entertainment Sahuarita</i>	685	5	1	727	0	185,000	0	5	0
<i>Desert Diamond Casinos & Entertainment Tucson</i>	1,089	13	13	1,271	270	165,000	148	10	1,300
<i>Desert Diamond Casinos & Entertainment Why</i>	55	0	0	55	0	5,000	0	1	31
subtotal	1,829	18	14	2,053	270	355,000	148	16	1,331
PINAL COUNTY									
Ak-Chin Indian Community									
<i>Harrah's Phoenix Ak-Chin Casino Resort</i>	1,089	12	13	1,264	470	48,800	300	6	850
YAVAPAI COUNTY									
Yavapai-Apache Nation									
<i>Cliff Castle Casino Hotel</i>	656	7	9	768	0	140,000	82	7	500
Yavapai-Prescott Indian Tribe									
<i>Bucky's and Yavapai Casinos</i>	553	6	11	672	0	30,000	161	3	0
YUMA COUNTY									
Cocopah Indian Tribe									
<i>Cocopah Casino</i>	505	7	0	554	350	24,000	101	3	400
Quechan Indian Nation									
<i>Paradise Casino Arizona</i>	506	0	0	506	300	11,613	0	1	420
TOTAL	15,523	254	224	18,869	8,474	2,102,513	3,297	98	14,836

Total Positions = Gaming Machines (incl. Class II) + 7 × (Table Games + Poker Tables). [4]

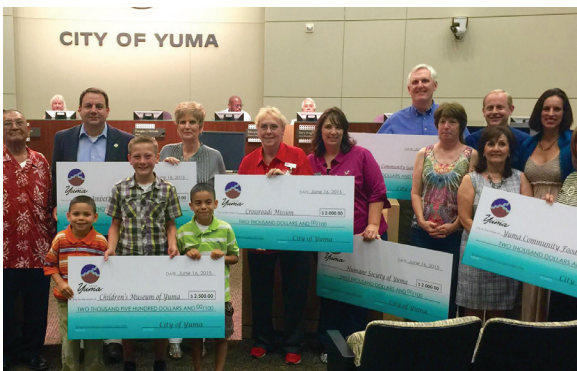
Contributions to Cities, Towns, and Counties

12% of a tribe's total annual contribution is distributed by the tribe to the cities, towns and counties of the tribe's choosing...for government services that benefit the general public, including public safety, mitigation of impacts of gaming, and promotion of commerce and economic development [A].

Arizona tribes have contributed \$115.8 million since FY2004, giving \$11.1 million in FY2014 to cities, towns, and counties [B,C]. Recent contributions include:

- A Navajo Nation contribution of more than \$25,000 to Coconino County in 2013 and ongoing contributions since then.
- A 2015 contribution of more than \$3,000 from the Colorado River Indian Tribes to the Parker Area Alliance for Community Empowerment in La Paz County [D].
- Two 2014 grants of more than \$13,000 each from the Cocopah Indian Tribe in Yuma County: one to the City of Somerton for its Senior Center and youth programs and the other to the City of Yuma to be split between the Community Food Bank and Crossroads Mission, an emergency housing shelter.
- A Pascua Yaqui contribution of \$74,000 to the City of Tempe in Maricopa County for its computer crimes forensics unit in 2014.
- A \$50,000 contribution from the Tohono O'odham Nation to the City of Tucson Fire Department in Pima County to distribute 2,000 child car seats.
- A 2014 Tonto Apache Tribe donation of more than \$24,000 to the towns of Payson and Star Valley in Gila County [E].

Tribes also make donations beyond the requirements of the compacts. For example, in 2013 the Ak-Chin Tribal Council pledged \$7.4 million to the City of Maricopa to help cover the operating costs Copper Sky Recreational Complex. The Maricopa Mayor, Christian Price, observed, "This is not the 12 percent gaming money required by the [compact]; this is [Ak-Chin's] own personal investment... in the City of Maricopa" [F].



Instructional Improvements Fund

56% [of the contributions go] to the Instructional Improvement Funds administered by the [Arizona] Department of Education. Every school district receives these funds. [A]*

Arizona tribes have contributed \$486.8 million since FY2004, giving \$43.1 million in FY2014 to the Instructional Improvement Fund [B,C]. The fund helps reduce class sizes, improve teacher compensation, and support early reader and dropout prevention programs. The funds are distributed to all state, public, and charter schools and can be a substantial and continuing source of funds for schools. In FY2013, for example, Santa Cruz Valley and Nogales Unified School Districts in Santa Cruz County received \$135,000 and \$236,000 from the fund, respectively [G]. Recent additional tribal support for education included:

- An Ak-Chin Tribal Council contribution in 2013 of \$2.6 million to the Maricopa Unified School District in Pinal County, which helped to fill a funding shortfall, benefitting 419 American Indian pupils and many non-Indian students [F].
- San Carlos Apache Tribe gave 149 iPads to Fort Thomas Unified School District for elementary and high school students who met or exceeded the reading, writing, and math requirements of the AIMS test in 2014 and gave MacBook Airs to graduating seniors [H].
- Salt River Pima-Maricopa Indian Community provided funding for an innovative summer bridge program at Maricopa Community College that helps address falling male minority college completion rates by giving middle-school boys mentors, college application training, and career models [I].
- A Yavapai-Apache Nation distribution of more than \$100,000 to public, private, and parochial schools in the Verde Valley of Yavapai County in 2014 [J].

* Contributions after payments to cities, towns, counties, the Arizona Dept. of Gaming, and the Office of Problem Gambling.



As is clear in Table 2, this investment is accompanied by very substantial employment. Indeed since 2000, when it employed about 9,300 Arizonans[5], tribal gaming has grown to rank among some of the largest and most influential segments of the Arizona economy. For example, tribal gaming employment ranks larger than Arizona’s mining and logging employment according to the Bureau of Labor Statistics but smaller than Arizona’s medical assistant jobs (Table 3). The US Bureau of Economic Analysis would rank tribal gaming employment between employment in electronics and appliance stores and forestry, fishing, and related activities (Table 4). Of course, neither federal agency tracks tribal gaming employment as its own segment, and tribal gaming jobs are implicitly included in other sectors’ totals. Nonetheless, the exercise puts tribal gaming in perspective.

Additional context comes from ranking Arizona’s tribal gaming employment against the top employers in the state (as reported by the *Arizona Republic*). Of course, statewide tribal gaming does not take place in one company, but rather in 23 facilities operated by 16 different owners as noted above. However, as a single category of enterprise, it ranks among the top ten statewide, above McDonald’s and below Wells Fargo (Table 5).

Tribal gaming was able to grow with the Arizona economy into the late 2000s, paralleling the growth of tribal gaming revenue nationwide. However the Great Recession had an outsize effect on Arizona, precipitating a decline from which tribal gaming revenue has not recovered (Figure 2). Statewide tribal gaming revenues were \$1.81 billion in the fiscal year ended

TABLE 3

Tribal Gaming Employment and Labor Sectors

Arizona statewide

BLS Sector 2014	Employees
Registered Nurses	47,020
Construction Laborers	19,090
Medical Assistants	16,380
Tribal gaming	14,836
Mining and logging	13,100
Lawyers	9,840
Pharmacists	5,860

[6]

TABLE 4

Tribal Gaming Employment and Industry Sectors

Arizona statewide

BEA Industry 2013	Employees
Accommodation	46,568
Farm employment	28,927
Clothing and clothing accessories stores	27,126
Mining	23,978
Forestry, fishing, and related activities	15,315
Tribal gaming	14,836
Electronics and appliance stores	11,721
Air transportation	13,828
Utilities	12,283
Food manufacturing	11,559

[7]

TABLE 5

Tribal Gaming Employment and Top 10 Employers

Arizona statewide

Rank	Top Employers 2014	Employees
1	Walmart	32,438
2	Banner Health	30,021
3	Kroger Co.	17,001
4	Albertsons	16,148
5	Wells Fargo	15,323
	Tribal gaming	14,836
6	McDonald's	12,770
7	Intel	11,200
8	Bank of America	10,500
9	JP Morgan Chase	10,500
10	Honeywell	10,000

[8]

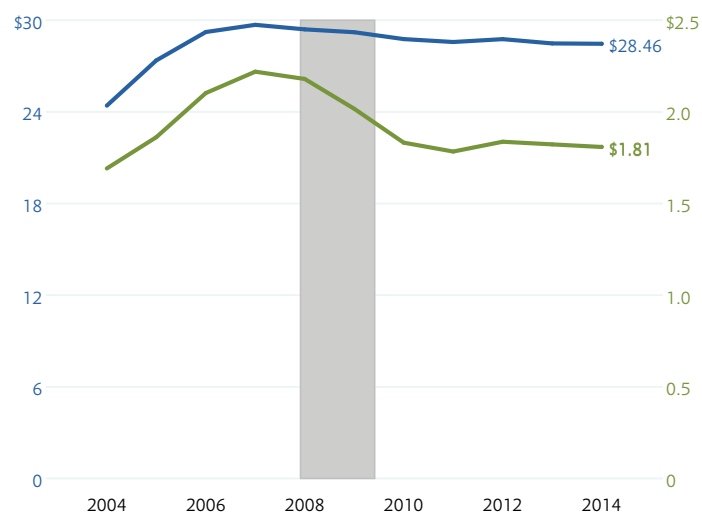
Tribal gaming employment ranks larger than Arizona’s mining and logging employment.

June 30, 2014, well below their inflation-adjusted peak in 2007.¹ Recent signs point to a possible recovery: second quarter 2015 tribal contributions to the Arizona Benefits Fund, which are calculated on the basis of gross gaming revenues, are up 4.5 percent compared with the prior year [10]. As the next section will explain, tribal gaming provides benefits for the state.

FIGURE 2

National Indian and Arizona Tribal Gaming Revenues by Fiscal Year

billions of 2014 dollars



Gray region indicates recession. [11-13]

III. THE BENEFITS OF TRIBAL GAMING FOR ARIZONA

Under the terms of the tribal-state compacts, Indian gaming in Arizona contributes directly to six statewide funds and a multitude of city, town, and county operations around the state. These financial flows ensure that tribes do not foist uncompensated burdens on state taxpayers, and they underwrite key public goods that Arizonans care about. In addition, Indian gaming participates in the broader Arizona economy: its payroll and purchasing dollars flow to Arizonan households and vendors, yielding revenue to the state treasury via the normal operation of Arizona's tax laws. This section describes the financial contributions and economic impacts.

¹ Unless otherwise indicated, all dollars in this report are inflation-adjusted by the CPI-U to 2014 dollars [9].

Trauma Emergency Services Fund

28% [of the contributions go] to the Trauma Emergency Services Fund administered by the Arizona Health Care Cost Containment System. [A]*

Arizona tribes have contributed \$243.4 million since FY2004, giving \$21.6 million in FY2014 to the Trauma and Emergency Services Fund [B,C]. More than 64 hospitals provide trauma care and emergency services in Arizona and benefit from this fund. In addition, tribes’ support for first responders and healthcare providers includes:

- The Salt River Pima-Maricopa Indian Community’s donation of a new fire engine to the Glendale Fire Department [K].
- Multiple contributions from the San Carlos Apache Tribe to the Globe Fire Department in Gila County that funded personal protection equipment for firefighters and a thermal imaging camera—equipment that would otherwise have been out of reach to a department facing post-recession budget cuts.
- A \$42,000 contribution from the Pascua Yaqui Tribe and \$29,000 from the Tohono O’odham Nation in 2014 and 2013, respectively, for Santa Cruz County sheriffs’ motorcycles [G].
- The Gila River Indian Community’s \$250,000 multiyear grant to the Southwest Center for HIV/AIDS in Phoenix, part of a fundraising campaign to renovate the Parsons Center for Health and Wellness [L].

* Contributions after payments to cities, towns, counties, the Arizona Dept. of Gaming, and the Office of Problem Gambling.



Tourism and Wildlife Conservation Funds

8% [of the contributions go] to the Tourism Fund administered by the State Office of Tourism...[and] 8% goes to the AZ Wildlife Conservation Fund administered by the State Game and Fish Commission. [A]*

Arizona tribes have contributed \$139.1 million since FY2004 (including \$12.3 million in FY2014) to both the Tourism Fund and the Wildlife Conservation Fund (split 50-50) [B,C]. A few years ago, the director of the Arizona Office of Tourism credited this money with keeping Arizona competitive with better-funded tourism destinations. The Arizona Wildlife Conservation Fund has supported studies of bison, bighorn sheep, various fish species, black bears, bobcats, coyotes, and foxes. It has also helped reintroduce wild turkeys, restore grasslands, and bolster Apache and Gila trout populations. In addition to funding state wildlife conservation, tribes around the state have undertaken ecosystem restoration and management on their own reservations. Work such as the Cocopah Tribe's efforts with the National Wildlife Federation to restore the Colorado River shoreline habitat [M] and the White Mountain Apache Tribe's efforts with US Fish & Wildlife to help the Apache trout move from endangered to threatened status under the Endangered Species Act redounds to the benefit of all Arizonans.

* Contributions after payments to cities, towns, counties, the Arizona Dept. of Gaming, and the Office of Problem Gambling.



A. FINANCIAL CONTRIBUTIONS

The Arizona compacts specify that tribes contribute a fraction of their gaming revenue. The progressivity of the share (i.e., the fraction that rises with revenue, see Table 6) lets tribes with modest casino operations invest a higher percentage of their casino revenue in their societies and economies. Those tribes that are fortunate to be located near the large markets of Maricopa and Pima Counties contribute proportionately more. Averaged statewide, the contributions amount to 5.4% of gross gaming revenue [13].

In fiscal 2014, tribes made \$97.8 million in direct contributions to Arizona state and local government.

TABLE 6

Sliding Scale of Tribal Contributions to Arizona

Class III Net Win	Tribal Contribution
First \$25 million	1%
Next \$50 million	3%
Next \$25 million	6%
Anything in excess of \$100 million	8%

[14]

In fiscal year 2014, tribes made \$97.8 million in direct contributions to Arizona state and local government. Of that, tribes contributed \$11.1 million directly to cities, towns, and counties to pay for “government services that benefit the general public, including public safety, mitigation of impacts of gaming, and promotion of commerce and economic development” [15]. The remaining fraction went to the Arizona Benefits Fund for: the Arizona Department of Gaming’s regulation of Indian gaming (\$8 million), problem gambling (\$1.7 million), school district instructional improvements (\$43.1 million), trauma and emergency services (\$21.6 million), wildlife conservation, and tourism (\$6.2 million each) [16].

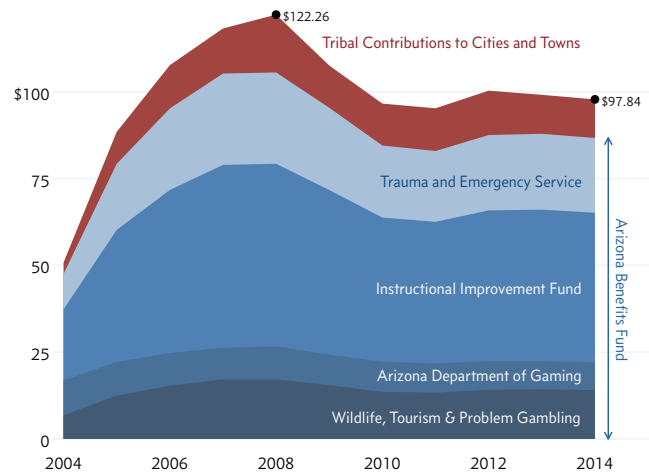
Total contributions to Arizona state & local government since the Proposition 202 compact exceed \$1.1 billion.

As would be expected, the contributions over time have generally followed the trajectory of total revenues (compare Figure 3 with the Arizona line in Figure 2). They have been steady at about this level—nearly \$100 million—every year since fiscal year 2010, but as noted above, the second quarter of calendar 2015 displayed 4.5% year-over-year growth. Total contributions to Arizona state and local government since the Proposition 202 compact exceed \$1.1 billion, with nearly a half-billion to the Instructional Improvement Fund, nearly a quarter billion to the Trauma and Emergency Services Fund, and more than \$100 million to cities, towns, and counties over the life of the compacts (Table 7).

FIGURE 3

Transfers from Indian Tribes to Arizona State and Local Governments

millions of 2014 dollars by Arizona fiscal year



[16]

TABLE 7

Cumulative Contributions from Indian Tribes to Arizona State and Local Governments

nominal dollars, FY2004 through June 30, 2015

beneficiary	millions
Tribal Direct Contributions	
Cities, Towns, & Counties	\$115.8
AZ Benefits Fund	
Problem Gambling	\$19.8
Arizona Department of Gaming	\$98.9
Instructional Improvement Fund	\$486.8
Trauma & Emergency Services Fund	\$243.4
AZ Wildlife Conservation Fund	\$69.5
State Tourism Fund	\$69.5
Total	\$1,103.8

Tribal contributions to cities, towns, and counties after June 30, 2014 have not been reported as of press time. [10,16]

B. THE ECONOMIC IMPACTS

Reservation economies are often constrained when it comes to meeting the demand for goods and services within their boundaries. Such economies are often poor, small, undiversified, or all of the above. This means that tribal gaming, the governments it funds, and the non-gaming businesses it capitalizes must turn to the off-reservation Arizona economy for labor, goods, and services. Detailed purchasing data from Washington state indicates that the preponderance of tribal purchasing (on the order of 94%) is from off-reservation vendors [17]. Employment data from six-

Regulation and Problem Gambling

\$8 million or 9% of tribal contributions to the Arizona Benefits Fund, which ever is greater, go[es] towards the payment of ADG's [the Arizona Department of Gaming's] regulatory and administrative costs. [In addition,] 2% [is] to be used to fund programs for the prevention and treatment of, and education concerning, problem gaming. [A]

Arizona tribes have contributed \$98.9 million since FY2004 (including \$8 million in FY2014) to the Department of Gaming for regulation. In addition, Arizona tribes have contributed \$19.8 million since FY2004 (including \$1.7 million in FY2014) to help problem gamblers through education, prevention, and treatment [B,C].





Linda H.
Elder, Hualapai Indian Tribe

Life here, as remote as we are, was always hard...But today I think we have everything we need.

One of the most important, and least visible, benefits of tribal gaming is what it allows tribal communities to do for their elders.

Linda, 81, was born, raised, and still lives on the Hualapai Reservation. Hualapai is a remote tribe of almost 2,000 members located near the western half of Grand Canyon in Northwestern Arizona.

Because it is isolated, the Hualapai Indian Tribe does not operate its own casino. Instead, it leases its allotted number of slot machines to metro area tribes who have better access to markets and customers. These transfer agreements provide critically important revenue streams for tribes located on lands far from the traffic and populations densities required to make casino projects viable.

The Tribe uses the income from these transfer agreements to meet a wide variety of community needs, including early childhood education and development, scholarships, infrastructure support and improvements, housing, community centers, and elder care.

This is especially important for elders like Linda, who is able to spend her afternoons connecting with friends and relatives over lunch at the community's new elder center, or connect with more distant family over the phone line the Tribe helps subsidize.

Linda also benefits from financial support that helps her heat her home during the freezing winters and cool it during the long hot summers. In the Hualapai community, transfer agreements also provide firewood for those elders whose homes do not yet have central climate control. This kind of support also extends to the Tribe's young people. Those with good grades qualify for additional resources they can use to further their education, such as personal laptops.

Transfer agreements are a lifeline for remote tribes. Linda is one of many Indians that rely on them for her family needs and her quality of life.

ty-three tribal entities in thirteen Arizona tribes—casinos, non-gaming businesses, and government agencies—indicates that about half (53%) of the tribal workforce in 2014 was non-Indian. Among the government entities, the percentage is lower: 36% of employees are non-Indian in this sample. But in tribal gaming enterprises, 67% of employees in 2014 were non-Indian.²

In tribal gaming enterprises, 67% of employees in 2014 were non-Indian.

Whether these demands register off the reservations or not or in Indian or non-Indian households, they register in the larger Arizona economy as it is measured by the US Department of Commerce’s Bureau of Economic Analysis. The resulting national income accounts can be used to build an economic model how they spread through the economy. In particular, economists build input-output models, such as IMPLAN, to estimate the direct, indirect, and induced effects of economic activity:

DIRECT EFFECTS... [are] the impacts (e.g., changes in employment) for the expenditures and/or production values specified as direct final demand changes.

INDIRECT EFFECTS... [are] the impacts (e.g., changes in employment) caused by the iteration of industries purchasing from industries resulting from direct final demand changes.

INDUCED EFFECTS... [are] the impacts (e.g., changes in employment) on all local industries caused by the expenditures of new household income generated by the direct and indirect effects of direct final demand changes. [18]

Gaming revenues fund capital investments in non-gaming tribal enterprise. Gaming revenues fund government expenditures on road building, schoolteachers, and police protection.

In plainer language, the *direct effects* of a casino operation include its payroll plus its purchases of electricity, food, other supplies, and services (such as might be provided by a cleaning company or accounting firm). A casino’s *indirect effects* are the economic impacts of the supply companies’ activities, such as the fuel purchases at the power plant or food supplier. The *induced effects* are generated by the household spending of the workers in both the casino itself (direct) and its suppliers (indirect) when those workers’ households buy groceries, clothing, appliances, and the other goods and services they consume. All together, the combined direct, indirect, and induced effects—the total impact—indicates the amount of a regional economy that is estimated to be associated with the given activity.

Table 8 presents the results of an impact model for the tribal gaming employment reported in Table 2 (adjusted for tribal survey responses) plus employment reported by 13 Arizona tribes for non-gaming enterprises and their non-enterprise government activity. Because Indian casinos are government-owned enterprises by law (IGRA) whose proceeds are used for tribal economic development and tribal government programs, it is appropriate to study the economic impact of tribes not just gaming. Gaming revenues fund capital investments in non-gaming tribal enterprise. Gaming revenues fund government expenditures on road building, schoolteachers, and police protection.

² This is not a randomized sample, but it includes half the tribal gaming facilities in Arizona and comprises a geographically diverse collection of small, medium, and large casinos.

Direct employment in Maricopa County is associated with \$135,000 in total value added per employee, whereas in Apache County only half as much (\$65,000). The large, diverse Maricopa economy can meet more of its firms' and households' demand than the rural Apache County economy. This is an added testament to the need for economic activity in the rural counties of Arizona and of tribal gaming's role in adding jobs and income to them.

TABLE 8

Estimated Arizona Economic Impacts of Tribal Gaming & Selected Other Tribal Operations

2014 dollars in millions

	Direct	Indirect	Induced	Total
Employment	21,596	4,973	8,603	35,172
Labor Income	\$991	\$225	\$374	\$1,590
Other Property Income	\$331	\$127	\$218	\$675
Tax on production & imports	\$168	\$31	\$71	\$271
Total Value Added	\$1,490	\$383	\$663	\$2,536

[19]

Table 8 also reports the impacts in jobs and in value added. The sum of all value added in an economy is its gross product, so the \$2.5 billion in total impact can be interpreted as the estimated proportion of Arizona gross state product that results from all of tribal gaming and the non-gaming activities of about half the tribes in the state (the survey respondents). Because of survey limitations, this number substantially understates the impact of all tribal activity in the state. It captures all the gaming activity, but not all the tribal activity gaming supports. Of the total impact, \$1.6 billion accrues to employees and \$675 million to property owners (in the form of interest, rents, royalties, dividends, and profits). And the state and federal governments collect \$271 million in taxes other than income taxes.³ These taxes are over and above the \$97.8 million in direct contributions made by the tribes in 2014 to Arizona state, cities, towns, and counties. To put these numbers in context, Arizona's gross domestic product in 2014 was about \$288 billion [9,21], making tribal economic activity a sizable, but by no means a dominating portion of the economy.

As was apparent in Figure 1 and Table 2, tribal gaming is not uniformly distributed across Arizona, but neither is it concentrated only where the market opportunities are strongest. Table 9 shows that Maricopa and Pima Counties have 12,812 direct jobs (tribal gaming, non-gaming, and government) between them, vastly more than Navajo County's 425. What's not quite so apparent is that total value added per employee tapers with remoteness. Direct employment in Maricopa County is associated with \$135,000 in total value added per employee, whereas in Apache County only half as much (\$65,000). The large, diverse Maricopa economy can meet more of its firms' and households' demand than the rural Apache County economy. This is an added testament to the need for economic activity in the rural counties of Arizona and of tribal gaming's role in adding jobs and income to them.

³ Tax on production & imports "consist[s] of taxes payable on products when they are produced, delivered, sold, transferred, or otherwise disposed of by their producers (including federal excise taxes and state and local sales taxes) and of other taxes on production, such as taxes on ownership of assets used in production (including local real estate taxes). These taxes do not include taxes on income." [20]



Christabelle M.
General Manager, Apache Gold Casino
Resort

Tribal gaming provided me an opportunity to remain and thrive here with my family, my people, and my community in San Carlos.

Christabelle's story epitomizes the positive impact that tribal gaming brings to Indian communities across Arizona. While today she serves as the General Manager to the Tribe's flagship Apache Gold Casino Resort, her success was far from assured as she grew up in the community.

Today the San Carlos Apache Tribe uses revenues from the casino to fund scholarships and provide employment opportunities on the reservation, but when Christabelle was young, finding a job to support a family seemed to require leaving the reservation.

But upon graduating high school, Christabelle could take advantage of a new opportunity to work as a summer intern at the Tribe's Apache Gold Casino. Then the Tribe offered her the opportunity to attend college at Northern Arizona University in Flagstaff and the University of Phoenix. She returned after graduation to continue her career at the Apache Gold Casino and Resort, where she has worked for two decades.

The San Carlos Apache Tribe is working to provide an environment where its people can thrive. The employment opportunities at the casino and flexible educational support system enabled Christabelle to stay on the reservation, stay connected to her community, and support her family financially.



Amber S.
Food and Beverage Manager,
UltraStar Multi-tainment Center,
Ak-Chin Indian Community

UltraStar is one of the best companies I've ever worked for and a great place to work. I truly appreciate the Ak-Chin Indian Community for helping me thrive in an amazing career. The Community fosters a supportive, nurturing, family-focused workplace that benefits all of the employees.

When Amber first moved to Maricopa in January 2014, she needed to find work quickly in order to support her two young children. So she set her sights on the UltraStar Multi-tainment Center at Ak-Chin Circle. With more than 15 years' experience in the hospitality industry, Amber quickly moved up from serving tables and tending bar to become the food and beverage manager. Today, Amber enjoys working for what she considers a 'family' business. That's because UltraStar, like all tribal enterprises, is owned by the Ak-Chin Indian Community, and is an example of the tribe's ongoing efforts to leverage existing gaming dollars to diversify their economies for this generation, and generations to come.

Amber is part of a growing number of tribal members and non-tribal members alike who benefit from the good jobs and careers that tribal gaming makes possible.

TABLE 9

Estimated Single-County Economic Impacts of Tribal Gaming & Selected Other Tribal Operations

2014 dollars in millions

	Apache	Coconino	Gila	La Paz	Maricopa	mohave	Navajo	Pima	Pinal	Yavapai	Yuma
Employment											
Direct	906	578	1,675	480	10,181	688	425	2,631	1,490	1,030	1,513
Total Value Added**											
Labor Income	\$45	\$21	\$69	\$13	\$878	\$47	\$14	\$121	\$72	\$52	\$66
Other Property Income	\$12	\$14	\$32	\$9	\$358	\$13	\$10	\$64	\$49	\$27	\$26
Tax on production & imports	\$2	\$9	\$13	\$7	\$142	\$2	\$6	\$37	\$12	\$11	\$8
Total	\$59	\$44	\$114	\$29	\$1,379	\$62	\$30	\$222	\$133	\$90	\$101

[19]

IV. THE NET BENEFITS TO THE ARIZONA ECONOMY

Tribal gaming produces substantial net economic benefits for Arizona.

Are these benefits net additions to the Arizona economy? Critics of studies like this rightly point out that they do not properly address what would have happened otherwise. Without Indian gaming, wouldn't Arizonans spend their leisure dollars some other way? Shouldn't these impacts be discounted because of this substitution effect?

In short, yes. If Casino of the Sun did not exist, Jane and John Doe would probably find alternative ways of spending a weekend evening in Tucson or further afield. The steak dinner they would have had at the casino could be a steak dinner at the restaurant off the reservation. The night at the slots could be a night on the town. These substitution effects can be important.

Having said that, substitution effects do not nullify the economic impacts reported in Table 8. In fact far from it: we know tribal gaming produces substantial *net* economic benefits for Arizona. First, tribal gaming carries its own weight. It does not foist on Arizona taxpayers the cost of regulating the fairness of games nor does it shy away from underwriting problem gambling prevention and treatment.

Indian gaming supports the only policy to produce measurable progress against Indian poverty: tribal self-determination.

Second, Indian gaming recaptures out-of-state tourism. Arizona's proximity to Nevada made it a prime source of revenue for the casino industry in that state before Indian casinos opened. Indian gaming virtually shut down the daily bus service to Laughlin, Nevada from small towns around the state [22]. In addition, tribal gaming helps recruit visitors and retirees to Arizona. It adds gaming to Arizona's offerings. It helps underwrite the Arizona Tourism Fund—\$70 million since fiscal year 2004. And it supports tribal investments in lodging, museums, ceremonies, and other features of Native Arizona—a signature part of what makes the state attractive. In California, where such Native-inspired visitation is less prominent, a ten percent increase in Indian slot machines in Northern California was found to correlate with one and two percent declines in South Lake Tahoe and Reno wagering [23]. Las Vegas certainly remains a international-caliber destination, but the presence of Indian casinos in Arizona certainly means gambling activity that would otherwise migrate out of state stays in state.

Third, tribal gaming grows the Arizona economy by supporting Indian economic self-sufficiency. For too much of the twentieth century, reservation economies were dependent on and driven by federal funding. Now the story is different. Indian gaming supports the only policy to produce measurable progress against Indian poverty: tribal self-determination [24]. Tribal innovation and investment in everything from elder care (Tohono O'odham) to judicial reform (Navajo) is strengthening communities and giving individual Indians income and career opportunities they never had before.

Of particular importance are tribal efforts to grow reservation economies. Before gaming, tribes faced high costs of capital and steep barriers to participating in the broader Arizona economy. Paradoxically, now that gaming produces dependable revenue streams, many tribes can get lower rates on loans, and of course, they can invest in infrastructure and other market-enhancing efforts that support economic growth. Tribes generally start by adding amenities with synergistic relationships to casinos like hotels, such as at Hon-Dah Casino, or golf courses, like the Talking Stick Golf Club. But tribal gaming revenue can also help capitalize more diverse tribal enterprises that range from Cocopah's Speedway (with an estimated \$10 million local impact [25]) and Fort McDowell's Yavapai Farms to convenience stores, ski resorts, and lumber mills. By helping diversify reservation economies and even off-reservation rural Arizona regions, these tribal reinvestments make the state economy more robust.



Ricardo D.
Member, Ak-Chin Indian Community

[Tribal gaming] impacted me in so many amazing ways.

Ricardo grew up in Casa Grande, Arizona and moved with his mother to Ak-Chin when he was 11 years old. He is currently participating in the casino's Harrah's Development System, in which he works as an intern in every single job in the casino over the course of two years. The internship includes on-the-job training in everything from washing linens and dishes in the back of the house, to walking the floor, counting cash, and even repairing slot machines—his current role. The internship aims to prepare associates from the Community for senior management.

The Harrah's Development System is specifically and exclusively for Ak-Chin members who wish to further their leadership skills and learn more about the tribal gaming sector. It is an example of how tribal gaming provides hands-on training and career opportunities that would not exist otherwise. Such opportunities would be especially rare for remote, rural tribes that would not participate in the leisure and hospitality sector but for the structure of compacted gaming in Arizona.

Following the program, Ricardo plans to graduate from Arizona State University and develop a business based in the Ak-Chin Indian Community. Tribal gaming has given him the opportunity to work, attend school, and provide for his family, all while remaining a vital, contributing member of the Community.

Unlike private corporations whose owners invest or spend profits wherever in the global economy they see fit, Arizona's tribes spend Indian gaming revenue in state.

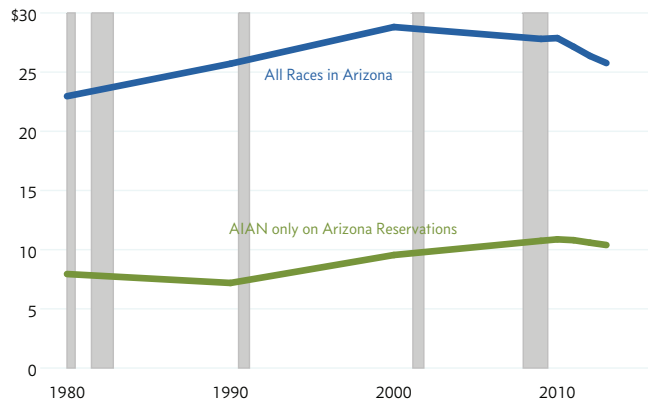
And while the challenges are still large, the trends are positive. Figure 4 and Figure 5 show long-term trends in per capita income and unemployment for Indians on Arizona reservations and for the all-races population in the state. The recent recession was a setback for both groups, but Indian progress in both absolute and relative terms has been welcome. Of course, gaming is one of many developments to contribute to the closing of these gaps, but few would debate the characterization of the Assistant Secretary of Indian Affairs, Kevin Washburn, that "Indian gaming is simply the most successful economic venture ever to occur consistently across a wide range of American Indian reservations" [26]. And when tribes grow their economies, the Arizona economy incontrovertibly benefits: Arizona produces more with its human, natural, and physical capital.

Indian gaming will not threaten to move operations out of state or overseas to obtain tax breaks or other advantages from Arizona taxpayers.

Finally, Indian gaming creates rural destinations, bringing jobs to Arizona regions that would not otherwise have them. Just as statewide Indian gaming employment ranks among the top employers of the state, remote tribal casinos are often among the top employers in their respective counties, if not the largest. What's more, unlike private corporations whose owners invest or spend profits wherever in the global economy they see fit, Arizona's tribes spend Indian gaming revenue in state. Likewise, Indian gaming will not threaten to move operations out of state or overseas to obtain tax breaks or other advantages from Arizona taxpayers. In sum, while substitution effects are important to consider, there's no question that Arizona reaps net economic benefits from Indian gaming.

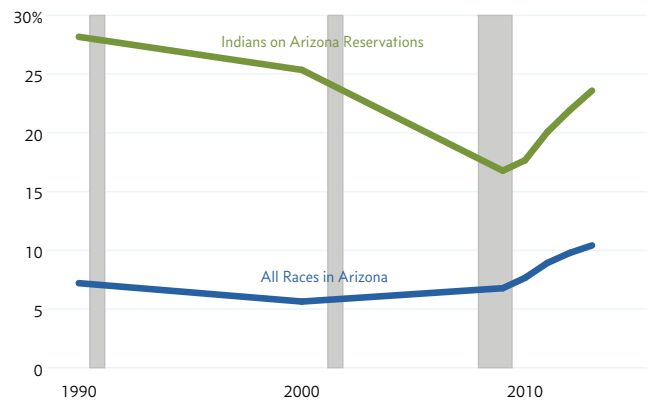
While substitution effects are important to consider, there's no question that Arizona reaps net economic benefits from Indian gaming.

FIGURE 4
Per Capita Income in Arizona
2014 dollars



Recessions shaded in gray. 2009-13 values are retrospective 5-year averages. [9,11,26-32]

FIGURE 5
Unemployment in Arizona
civilian labor force 16+ years



Recessions shaded in gray. 2009-13 values are retrospective 5-year averages. [11,26-32]

ABOUT THE AUTHOR

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THE TAYLOR POLICY GROUP, INC. provides economic and public policy research to Native governments, corporations, and consortia. Native nations use our research for internal decision-making, in negotiations, for tribal policy, and in contested proceedings. TPG brings expertise spanning natural resource economics, gaming policy, impact analysis, economic development strategy, taxation, and the governance of tribal corporations. TPG consultants have also supported tribal government reform ranging from performance-based budgeting and corporate governance to tax policy and constitutional change.

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