



Everyone Wins:

THE POSITIVE IMPACTS OF TRIBAL
GAMING ON NORTH DAKOTA'S ECONOMY

Economic & Workforce Impact Study
Conducted Summer 2020

U♦T♦G♦A

**UNITED TRIBES
GAMING ASSOCIATION**

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UTGA's leaders and staff were instrumental in identifying data sources and gathering information utilized in the report. Special appreciation is extended to UTGA's Executive Director Cynthia Monteau for providing guidance and support throughout the study, as well as to UTGA's Board of Directors for coordinating the dissemination and collection of survey data.

The research team also acknowledges the casino managers, financial officers and other executives who completed and returned survey questionnaires and other requested documents.

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Respectfully submitted,

A handwritten signature in black ink, appearing to read "Michael J. Mabin". The signature is fluid and cursive, with a prominent initial "M" and a period at the end.

Michael J. Mabin, President

Marketing and Advertising Business Unlimited, Inc.

(Doing business as Agency MABU)

Background Information

In April 2020, Marketing & Advertising Business Unlimited, Inc. (dba Agency MABU), was hired by the United Tribes Gaming Association (UTGA) to conduct a research study to determine the contribution of tribal casinos to North Dakota's economy.

This is the first such study of its kind to be conducted by UTGA. The results will serve as a benchmark for measuring changes in the future. For sake of prior comparisons, the impact of casino activity in North Dakota was estimated at \$36 million in 1994 as part of a report titled "Casinos in the Upper Midwest – A Discussion of the Impacts" (Dean A. Bangsund and F. Larry Leistritz).

In the Bangsund & Leistritz report, the North Dakota Indian Gaming Association (NDIGA) provided information relating to the economic benefits of tribal casinos in North Dakota. NDIGA used wage scales and employment rates for Native American reservations in the State to illustrate the need for tribal governments to pursue economic development opportunities. NDIGA reported that the five (5) tribal casinos in North Dakota were estimated to employ 1,800 people in 1994. No estimate of the number of full-time jobs was given. About 82 percent of those employed were of Native American descent. Information from two of the state's five casinos suggested that about 25 percent of those employed in casinos were previously unemployed. An even higher percentage, 33 percent, were welfare recipients at the time of initial employment by the casinos.

Comparing the NDIGA findings of 1994 to the UTGA findings of 2020 reveals that the estimated number of casino employees has remained relatively unchanged (e.g., 1,800 employees in 1994 vs. 1,972 employees in 2020). However, the estimated overall gaming activity has grown substantially since 1994 (e.g., \$36 million in 1994 to \$300+ million in 2020).

Research Methodology

In the summer of 2020, the United Tribes Gaming Association (UTGA) distributed an economic impact survey to tribal gaming representatives affiliated with the five (5) tribes of North Dakota.

Agency MABU developed a first draft version of the survey questionnaire. The survey instrument was designed to gather data from calendar years 2018 and 2019 relating to tribal gaming employment, expenses, revenues, and other societal impacts. The questionnaire was reviewed and revised by UTGA's Board of Directors. The draft survey was also shared with several North Dakota-based tribal casino executives to identify any questions or concerns prior to finalizing the questionnaire.

Based on feedback from UTGA's Board members, as well as tribal casino executives, Agency MABU and UTGA's Executive Director prepared a final draft of the questionnaire (Appendix A – Data Collection Form), along with instructions (Appendix B – Data Collection Form Instructions).

The survey and instructions were then distributed to tribal casino executives who are identified by UTGA's Board of Directors as the primary points of contact at each tribal casino to be surveyed. The list of survey recipients included general managers, chief operating officers, and chief financial officers at the five (5) full service tribal casinos located in North Dakota (Appendix C – Participating Facilities).

The method of distributing the survey was by e-mail. The first e-mail invitation was sent to tribal casino representatives by UTGA's Executive Director in early May 2020. The tribal casino executives were provided with survey instructions and asked to complete and return the questionnaire by July 15, 2020. Several follow-up emails and phone calls were completed during the months of May and June as reminders to those who had yet to complete the survey.

Of the five (5) tribal casinos invited to submit data for the 2020 impact survey results, three (3) of the facilities provided all requested information. The other two (2) facilities partially completed the survey. In both cases, the sections covering employment and expenses were fully completed; however, the section covering revenue was not completed. Therefore, the revenue data for these two facilities has been estimated for reporting purposes. The estimates were based on comparing the total number of employees and total operating expenses for each facility with the other facilities' actual data. Standard benchmarks and ratios such as "revenue per employee," "net income," and "margin" were used to estimate the revenue for each of the non-reporting facilities. *

Beyond the five (5) tribal casinos that submitted data as part of this study, additional data is included from the Grand Treasure Casino in Trenton, ND, which is owned and operated by the Turtle Mountain Band of Chippewa Indians. Grand Treasure Casino was not surveyed as part of this study; however, estimated financial and employment data for this facility was gathered and aggregated from several online sources, including ZoomInfo, an American-based company providing comprehensive market intelligence relating to employment and revenue. By incorporating data pertaining to Grand Treasure Casino, the UTGA Impact report reflects a more accurate accounting of the full economic impact of tribal gaming in North Dakota. Future impact studies conducted by UTGA will include Grand Treasure Casino in the formal data gathering process.

*** For sake of this study, net income is defined as “gross revenue minus total operating expenses,” and margin is defined as “net income divided by gross revenue.”**

Concepts Utilized to Determine Impact Multipliers

Generally speaking, an input-output analysis is typically used to estimate the total economic impact of an initial change in an economy. This includes the direct effect of the initial change, as well as secondary effects that result from the initial change. Such a measure is used to calculate the effects created by an increase or decrease in economic activity. In economics, this measure is called the “multiplier effect” or “ripple effect.” Multipliers are used in this report.

A multiplier of 1.5 is the effect used to estimate the total impact of tribal gaming on North Dakota’s economy. This multiplier was chosen based on a landmark study conducted by the National Gambling Impact Study Commission (NGISC) titled “The Regional Economic Impacts of Casino Gambling: Assessment of the Literature and Establishment of a Research Agenda (Adam Rose & Associates). A copy of the full report is found here: <https://govinfo.library.unt.edu/ngisc/reports/ecoimprpt.pdf>

The NGISC report offers the following rules of thumb on multiplier effects:

- ◆ Small cities or groups of rural counties are not likely to have multipliers exceeding 1.5
- ◆ Medium sized to large sized cities multipliers would likely not exceed 2.0
- ◆ Very large cities or state multipliers would likely not exceed 2.5

The multiplier effect of 1.5 is used in this report to calculate both the impact on overall spending in the economy, as well as the overall impact on employment. Think of the multiplier like a snowball effect: when an organization spends money, it creates income for other organizations and individuals. If these organizations and individuals spend a portion of these new earnings, they create income for a third party, who then creates income for a fourth party...and so on.



Therefore, spending \$1.00 may create several dollars of new income in the economy. The multiplier estimates how much income is generated by an extra dollar in spending. For example, if the multiplier is 1.5, one dollar in spending leads to a \$1.50 increase in income. Another example of a 1.5 multiplier effect is that for every job that is performed within an organization, an additional 0.5 jobs are created elsewhere in the economy. In other words, this means that if employment increases by one job in tribal gaming, then an additional 0.5 other jobs are created throughout the economy.

Research Gaps and Limitations

The research findings contained within this report represent a reasonable and realistic estimate of the financial, employment, and societal impacts of the tribal gaming industry on North Dakota's economy. However, the findings are not a definitive or complete representation of the total impact of the tribal gaming industry due to the following factors:

- ◆ **The total population surveyed was incomplete.** In other words, not all of the tribal casino facilities were included as part of the research study. Only the five (5) largest casinos were invited to complete the survey process, of which only three (3) of the facilities provided a complete data set. Two of the facilities provided a partial response. A sixth casino is also included in this report; however, the data has been estimated from online sources.
- ◆ **The potential for response error.** Although the survey instrument was pre-tested for clarity and understanding among the respondents, there exists a margin of error where differing interpretations may have been made by the various respondents. To minimize such errors, the survey instrument was accompanied by a separate set of instructions.
- ◆ **The potential for data analysis error.** Although one survey instrument was used to gather most information, additional data sources were also used to create projections and estimates for partially participating facilities. These data sources contained information from several different time periods.

Despite these gaps and limitations, the findings of this report represent a sound estimate of the significant and positive impact that tribal casinos offer to the state of North Dakota and its residents.

Extraordinary Market Forces

The timeframe covered by this report runs from January 1, 2018 to December 31, 2019. During this two- year period, there were several extraordinary market forces which impacted tribal casinos in North Dakota, both positively and negatively. These circumstances include, but are not limited to, the following, market forces:

- ◆ North Dakota legislators approved Las Vegas-style electronic pull tabs in 2017. The games began to be implemented in August 2018. The impact was immediate and profound.
 - By the end of 2019, there were more than 2,300 electronic pull tab machines at 570 sites, which are located in about 80 percent of North Dakota cities and towns, according to data obtained by The Associated Press (AP story titled “North Dakota tribes fret about rise of electronic pull tabs, by James MacPherson, February 26, 2020).
 - The AP article stated “An analysis done by the charitable gaming division of the attorney general’s office and obtained by the AP shows net proceeds for the state’s five (5) tribes decreased by more than 17% from 2017 to 2018, while charitable gambling organizations reported a near-identical rise.”
 - The AP article estimated that the explosion of electronic pull tabs in North Dakota will increase the amount wagered on charitable games in the current two-year budget cycle to over \$1 billion, with most of the wagers coming from electronic pull tabs. That represents about 75% more than the previous budget cycle.

- ◆ In early 2016, a grassroots movement began in North Dakota to protest the construction of Energy Transfer Partners’ Dakota Access Pipeline (DAPL). Throughout 2016, thousands of protesters joined the movement, which ultimately resulted in shutting down the main road leading to Prairie Knights Casino. This caused a significant decline in casino revenue in 2017. Although the protests have since subsided and the pipeline was fully completed in May 2017, the recovery period for Prairie Knights Casino has been slow.

- ◆ The “boom and bust” cycle of the oil and gas industry has impacted tribal casinos in North Dakota. The application of hydraulic fracturing and horizontal drilling technologies caused a boom in Bakken oil production during the past decade. For example, by 2017, the production reached over 1 million barrels of oil per day. This brought thousands of new residents and hundreds of new businesses to the State, which in turn increased the revenue for tribal casinos, especially those located in central and western North Dakota (e.g., 4 Bears Casino in New Town and Grand Treasure Casino near Williston).

- ◆ The COVID-19 pandemic has also significantly impacted tribal casinos. All of the facilities have been shut down for extended periods of time during the pandemic. They are just now beginning to re-open in the fall of 2020, and it will take months, if not years, to recover from the impact.

These circumstances and other market forces have placed a tremendous burden on tribal casinos to remain relevant and viable. The industry needs to continue adapting to the marketplace, while exploring new ways to both strengthen and diversify their offerings. Tribal casinos play a vital role in supporting the economic vitality of tribal communities and citizens. They continue to fulfill their original mission of promoting tribal economic development and self-sufficiency.

Research Findings

In 1988, Congress passed the Indian Gaming Regulatory Act (IGRA) which authorized sovereign tribal nations to conduct gaming on Indian lands. The IGRA requires that tribal gaming net revenues be used in five specific areas:

- ◆ To fund tribal government operations or programs
- ◆ To provide for the general welfare of the tribe and its members
- ◆ To promote tribal economic development
- ◆ To donate to charitable organizations
- ◆ To help fund operations of local government agencies providing services to tribes

To this end, every tribal casino devotes their revenues to tribal government services, economic and community development, charitable donations, and contributions to the general welfare of tribal communities. Thus, substantial benefits are delivered directly by tribal casinos to tribal citizens; however, the positive impacts of tribal gaming spread well beyond tribal lands.

The research study which follows is titled “Everyone Wins: The Positive Impacts of Tribal Gaming on North Dakota’s Economy.” The study was conducted in 2020 to assess the contributions made by tribal gaming to the economy of North Dakota. The study gathered data relating to total gaming revenue and expenditures, total employment and wages, and community benefits to tribal members and the public at large.

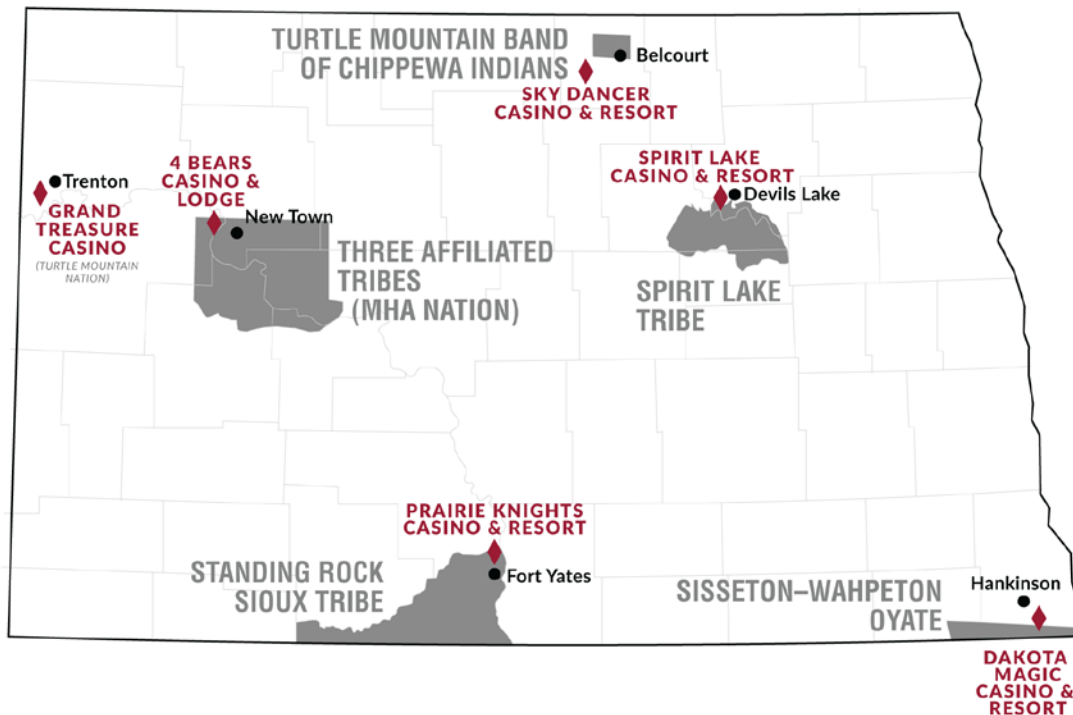
The five tribes of North Dakota operate a total of six (6) major casinos which include:

- ◆ Sky Dancer Casino & Resort, Belcourt (Turtle Mountain Band of Chippewa Indians)
- ◆ Spirit Lake Casino & Resort, St. Michael (Spirit Lake Tribe)
- ◆ 4 Bears Casino & Lodge, New Town (Three Affiliated Tribes - MHA Nation)
- ◆ Grand Treasure Casino, Trenton (Turtle Mountain Band of Chippewa Indians)
- ◆ Prairie Knights Casino & Resort, Fort Yates (Standing Rock Sioux Tribe)
- ◆ Dakota Magic Casino & Resort, Hankinson (Sisseton-Wahpeton Oyate)



These tribal casinos offer North Dakota residents and out of state visitors with a comprehensive array of services including gaming, entertainment, lodging, food & beverages, and retail stores. Tribal gaming contributes significantly to the overall stability and strength of the State. Tribal casinos provide positive impacts relating to financial, employment, and societal benefits.

The report’s findings reveal the following economic and workforce indicators based on data gathered from calendar years 2018 and 2019:



TOTAL OPERATING EXPENDITURES EXCEED \$225 MILLION ANNUALLY

Total operating expenditures for all tribal casinos operating in North Dakota exceeds \$225 million annually. The change in total operating expenditures between CY 2018 and CY 2019 was negligible. Expenditures were \$226.1 million in CY 2018 as compared to \$226.5 million in 2019, which represents an increase of less than 1% from one year to the next (e.g. 0.19%).

DESCRIPTION	2018	2019	PERCENT CHANGE
Total labor expenses	\$84,085,366	\$85,885,302	2.14%
Total non-labor expenses	\$142,021,768	\$140,656,480	-0.96%
Total operating expenditures	\$226,107,134	\$226,541,782	0.19%

Total operating expenditures represent a combination of labor-related expenses, as well as non-labor related expenses.

- ◆ Total labor expenses increased from \$84.1 million in CY 2018 to \$85.9 million in CY 2019, which represents an increase of slightly more than 2% from one year to the next (e.g., 2.14%).
- ◆ Total non-labor related expenses decreased from \$142.0 million in CY 2018 to \$140.6 million in CY 2019, which represents a decrease of nearly 1% from one year to the next (e.g., -0.96%).

TOTAL DIRECT EMPLOYMENT APPROACHES 2,000 FULL-TIME EQUIVALENTS (FTES)

The total number of workers (a combination of both full-time and part-time) who were directly employed by tribal casinos in North Dakota is approaching 2,000 full-time equivalents (FTEs), which is defined as being equal to the number of hours a full-time employee works for an organization. For example, if an organization considers 40 hours per week as full-time and there are four employees who work 10 hours each per week, those four employees would make 1.0 FTE.



DESCRIPTION	2018	2019	PERCENT CHANGE
Total employment (FTEs)	1,914	1,972	3.03%

The total number of FTE’s working at tribal casinos in North Dakota in CY 2108 was 1,914, whereas the total number of FTEs in CY 2019 was 1,972. This represents an increase of approximately 3% from one year to the next (e.g., 3.03%).

TOTAL GROSS REVENUES EXCEED \$300 MILLION ANNUALLY

The estimated total gross revenues generated by all tribal casinos operating in North Dakota exceeds \$300 million annually. These revenues are separated into three (3) categories: gaming operations, hotel operations, and other operations.

- ◆ Gaming operations refer to revenue generated from games of chance such as slot machines, bingo, blackjack, poker, and other table games. The total revenue generated from gaming operations in CY 2018 was \$201.2 million, whereas the total revenue in CY 2019 was \$204.9 million. This represents an increase of nearly 2% from one year to the next (e.g., 1.88%).
- ◆ Hotel operations refer to revenue generated primarily from overnight stays. The total revenue generated from hotel operations in CY 2018 was \$15.3 million, whereas the total revenue in CY 2019 was \$15.2 million. This represents a slight decrease of nearly 1% from one year to the next (e.g., -0.75%).
- ◆ Other operations refer to revenue generated from food & beverage, gift shop, c-store and other supporting programs and service offerings. The total revenue generated from other operations in CY 2018 was \$78.8 million, whereas the total revenue in CY 2019 was \$79.9 million. This represents an increase of over 1% from one year to the next (e.g., 1.38%).

When combining all three (3) categories, the total gross revenue generated from all operations in CY 2018 was \$295.3 million, whereas the total revenue in CY 2019 was \$300.0 million. This represents a slight increase of approximately 1.5% from one year to the next (e.g., 1.61%).

DESCRIPTION	2018	2019	PERCENT CHANGE
Gross revenues - gaming operations	\$201,164,401	\$204,941,278	1.88%
Gross revenues - hotel operations	\$15,273,916	\$15,158,606	-0.75%
Gross revenues - other operations	\$78,818,081	\$79,909,612	1.38%
Total gross revenues - all operations	\$295,256,398	\$300,009,496	1.61%

AVERAGE WAGES APPROACH NEARLY \$45,000/FTE ANNUALLY

The average annual wage for a full-time employee working in a tribal casino in North Dakota in CY 2018 and CY 2019 was \$44,783. This average wage is represented by a wide variety of entry level service positions, as well as supervisory and management positions. The actual wage for each job category varies widely, which is a factor that was not surveyed as part of this report. Instead, the average wage was calculated based on aggregating the total wages paid by tribal casinos in North Dakota for all positions.

TOTAL ECONOMIC OUTPUT OF TRIBAL CASINOS APPROACHES \$340 MILLION

The direct expenditures of the six (6) tribal casinos operating in North Dakota in CY 2019 is estimated at \$226.50 million. Using the multiplier of 1.5, a secondary impact of \$113.25 million from this sector brings the total economic impact to \$339.75 million.

TOTAL EMPLOYMENT IMPACT OF TRIBAL CASINOS APPROACHES 3,000 FTES

The “Everyone Wins” research results indicate that tribal casinos in North Dakota directly employed 1,972 full-time equivalent positions in CY 2019.

The employment multiplier used for the tribal gaming sector is 1.5. This signifies that for each job created in this sector, an additional 0.50 jobs are created throughout the state due to business (indirect) and household (induced) spending.



For example, assuming the total direct employment of all tribal casinos in the State of North Dakota is 1,972 FTEs, the total employment impact is 2,958 FTEs (e.g., 1,972 FTEs x 1.50 = 2,958 FTEs)

Thus, the secondary impact of the tribal gaming sector is 986 FTEs (1,972 x 0.50 = 986). These are the additional jobs created in other industry sectors in the economy of the State of North Dakota resulting from the spending of tribal casinos, combined with the spending of casino employees.

TOTAL PERSONAL INCOME IMPACT EXCEEDS \$135 MILLION

Using an income multiplier of 1.5 means that for each employment dollar created in the tribal gaming sector, an additional \$0.50 cents in personal income is created throughout the state due to business (indirect) and household (induced) spending.

The average annual wage for a tribal casino sector employee was \$44,783 in CY 2019. When this figure is multiplied by the total employment in the tribal gaming sector during the same period (1,972 FTEs), the total personal income for the tribal gaming sector equals \$88,312,076.

Applying the income multiplier (\$88,312,076 x .50 = \$44,156,038) results in a secondary income impact of roughly \$44.2 million in additional salaries and benefits to non-casino employees. Thus, the tribal casino sector's total personal income impact equates to more than \$135.50 million.

TRIBAL CASINOS ARE CRITICAL TO INDIAN RESERVATIONS AND RURAL COMMUNITIES

On Indian reservations across the nation, tribal casinos are often the largest employer in the area. Thus, tribal casinos provide a source of jobs for people who may have otherwise been unemployed. Tribal casinos also provide an anchor for other jobs in sectors such as tourism, education, and healthcare, which may not be available in the absence of a tribal casino.

TRIBAL GAMING IMPACT EXCEEDS OTHER MAJOR INDUSTRIES *

Tribal gaming exceeds the economic impact of other major industries and sectors of North Dakota's economy as evidenced by the following chart. (Create a bar graph)

2020 ND Tribal Gaming: \$339 million

2018 ND National Guard: \$276 million

2016: ND Tribal Colleges: 190 million

2016: ND Wind Energy: \$170 million

*** See reference list for links to research studies.**

Conclusions

The significance of an industry that provides economic and workforce benefits to tribal communities and residents throughout North Dakota is immeasurable. Overall, the operation of tribal casinos directly and indirectly generates a myriad of economic activity, including

- ◆ Expenditures by tribal casinos, the tribes that operate casinos, suppliers to tribal casinos, and other businesses down the supply chain
- ◆ Jobs at tribal casinos, tribal governments, suppliers to tribal casinos, and other businesses down the supply chain
- ◆ Wages paid to casino employees and employees at all impacted businesses
- ◆ Household expenditures by employees of all impacted businesses and governments
- ◆ Taxes on all taxable economic activity
- ◆ Direct gaming-related payments by tribes to federal, state, and local governments.

Appendices

The following resources and data were used to conduct the 2020 “Everyone Wins” study.

Appendix A:

DATA COLLECTION FORM

Data Collection Form
North Dakota Tribal Gaming Operations

PART I – GENERAL INFORMATION			
Today’s Date:		Casino:	
Name (person) completing form:		Title:	
Tele/Cell No.:		Email:	

PART II - LABOR DATA			
Description		Jan. 1–Dec. 31, 2018	Jan. 1–Dec. 31, 2019
1	# Full-Time Employees (30-40 hrs./week)		
2	# Part-Time Employees (under 30 hrs./week)		
3	Total FTEs (full time equivalents)		

PART III - EXPENSE DATA			
Description		Jan. 1–Dec. 31, 2018	Jan. 1–Dec. 31, 2019
4	Operating expenses - labor		
5	Operating expenses - non-labor		
6	Total operating expenses		

PART IV - REVENUE DATA			
Description		Jan. 1–Dec. 31, 2018	Jan. 1–Dec. 31, 2019
7	Gross revenue - gaming operations		
8	Gross revenue - hotel operations		
9	Gross revenue - other operations		
10	Total gross revenue - all operations		

PART V - OTHER DATA			
Description		Jan. 1–Dec. 31, 2018	Jan. 1–Dec. 31, 2019
11	Funds returned to Tribe for government services and/or charitable purposes		

Appendix B:

DATA COLLECTION FORM INSTRUCTIONS

North Dakota Tribal Gaming Operations Data Collection Form

PURPOSE

To calculate the significant economic benefits to the state, county, and city governments generated by the five (5) tribal casinos in North Dakota.

USE OF DATA

The United Tribes Gaming Association (UTGA) collects the data from each tribal casino in North Dakota and aggregates the data for the purposes of conducting an economic analysis. The economic analysis will gauge the impact generated by the employment and expenditure activities of tribal gaming operations.

DATA TYPE

The economic impact is reported based upon labor (direct impact) and value-added data (indirect impact) as a result of operational expenses. The below instructions explain the type of data required for each part and subpart of the data collection form:

PART I – GENERAL INFORMATION

- Insert the Date the data is submitted
- Insert the Name of the Casino
- Insert the Name and Title of the person completing the form
- Insert the telephone/cellphone and email of the person completing the form

PART II – LABOR DATA

1. Report the number of actual full-time positions employed by the casino's total operations (e.g., gaming, hotels, restaurants, etc.). Full-time positions are defined as those requiring an individual to work 30-40 hours/week. Full-time positions include both exempt and non-exempt employees.
2. Report the number of actual part-time positions employed by the casino's total operations (e.g., gaming, hotels, restaurants, etc.). Part-time positions are defined as those requiring an individual to work 30 hours/week or fewer. Part-time positions only include non-exempt employees.
3. Report the total full-time equivalent (FTEs) employed by the casino's total operations (e.g., gaming, hotels, restaurants, etc.) during each calendar year (2018 and 2019). FTE's are determined by adding up the total number of hours worked by your part-time employees during each calendar year and dividing by 2080 hours. For example, if you had 10 part-time employees who worked a

combined total of 14,400 hours during the year, the FTE count would be 6.92 FTEs. This number would be added to the total number of full-time employees to determine the FTE number to report for each year.

PART III – EXPENSE DATA

4. Report the operating expenses associated with “labor” for the casino’s total operations (e.g., gaming, hotels, restaurants, etc.). This is the sum of each employee’s gross wages which includes salaries, payroll taxes, benefits, paid time off, health insurance, etc.
5. Report the operating expenses associated with “non-labor” for the casino’s total operations (e.g., gaming, hotels, restaurants, etc.). This includes every other operational expense not directly related to gross wages.
6. Report both the labor and non-labor operating expenses for each calendar year, which is calculated by simply adding up the two columns for each year.

PART IV – REVENUE DATA

7. Report the total revenue generated from gaming operations during each calendar year.
8. Report the total revenue generated from hotel operations during each calendar year.
9. Report the total revenue generated from all other operations during each calendar year.
10. Report the total gross revenue generated from all sources during each calendar year, which is calculated by simply adding up the three columns for each year.

PART V – OTHER DATA

11. Report the estimated amount of funds (e.g. annual proceeds) that are returned to the Tribe to support any and all tribal needs, including government services and/or charitable purposes. In other words, a certain amount of the casino’s annual profits (gross revenue minus total expenses) are retained by the casino to support operational needs, and a certain amount of the profits are turned over to the Tribe. Approximately how much of the annual proceeds were paid to the Tribe in 2018 and 2019.

Appendix C:

PARTICIPATING TRIBAL CASINO FACILITIES

The following tribal casinos were invited to share data as part of the 2020 Economic Impact Survey conducted by the United Tribes Gaming Association (UTGA).

1. 4 Bears Casino & Lodge: full participation in the 2020 impact survey

www.4bearscasino.com

4 Bears Casino & Lodge is owned and operated by the MHA Nation. The facility is located just west of New Town, ND.

2. Dakota Magic Casino and Hotel: full participation in the 2020 impact survey

www.dakotamagic.com

Dakota Magic Casino is owned and operated by the Sisseton-Wahpeton Oyate Tribe. The facility is located just minutes from Hankinson in southeastern North Dakota.

3. Prairie Knights Casino & Resort: full participation in the 2020 impact survey

www.prairieknights.com

Prairie Knights Casino is owned and operated by the Standing Rock Sioux Tribe. The facility is located near Fort Yates, ND.

4. Sky Dancer Casino & Resort: partial participation in the 2020 impact survey

www.skydancercasino.com

Sky Dancer Casino is owned and operated by the Turtle Mountain Band of Chippewa Indians. The facility is located five miles west of Belcourt, ND, and 15 minutes south of the Canadian border.

5. Spirit Lake Casino & Resort: non-participation in the 2020 impact survey

www.spiritlakecasino.com

Spirit Lake Casino is owned and operated by the Spirit Lake Nation. The facility is located three miles from the St. Michael, ND.

** Grand Treasure Casino which is owned and operated by the Turtle Mountain Band of Chippewa Indians, and located in Trenton, ND, was not surveyed as part of the 2020 Impact Study. However, estimated data gathered and aggregated from various online sources has been incorporated into the final report to reflect a more accurate accounting of the full economic impact of tribal gaming in North Dakota. Future impact studies conducted by UTGA will include Grand Treasure Casino in the formal data gathering process.*

References

The following list of publications and internet reports were used as references for the “Everyone Wins” economic impact study.

- 1 American Gaming Association, The Economic Impact of Tribal Gaming: A State-by-State Analysis 2014, Alan Meister, Ph.D. and Nathan Associates, Inc.

<https://www.americangaming.org/sites/default/files/Economic%20Impact%20of%20Indian%20Gaming%20in%20the%20U.S.%20September%202017.pdf>

- 2 ND National Guard FY 2018 Economic Impact: \$276 million

<https://www.ndguard.nd.gov/sites/www/files/documents/Sites/PA/FY18-NDNG-EIA-INFO.PDF>

- 3 Tribal Colleges Study by North Dakota Association of Tribal Colleges - Tribal colleges spent a combined total of \$65.1 million and provided more than 800 jobs, the report said. contributed more than \$190 million to the state’s economy during fiscal year 2016.

<https://apnews.com/6c32f4f3fc774d1f9d2444d6897f43ae>

- 4 NDSU study estimates wind industry’s impact on North Dakota’s economy at over \$170 million in 2016

<https://www.ndforallenergy.org/news-feed/2017/10/20/wind-energy-is-growing-north-dakotas-economy>

U ♦ T ♦ G ♦ A

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