



December 16, 2024

# **The Contributions of Indian Gaming to Oregon's Economy from 2020 Through 2023**

A Market and Economic Impact Analysis

Prepared for: Oregon Tribal Gaming Alliance

**ECOnorthwest**

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# Table of Contents

1.	Oregon Casinos and Tribes .....	3
2.	Economic Impacts .....	17
3.	Gaming Market in 2023 .....	32

# Executive Summary

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## Assignment

The Oregon Tribal Gaming Alliance (“OTGA”) is a coalition of Indian Tribes. Since 2003, they have engaged ECONorthwest to calculate the impacts of Tribal casinos on Oregon’s economy, their support of tribal members, and their contributions to Oregon charities. This report covers the years 2020 through 2023.

OTGA members provided audited data on the Tribes and casinos, which ECONorthwest totals for its analysis. ECONorthwest also compares tribal casinos with all other forms of gaming. It does this by assembling data from a wide array of sources including the Oregon Lottery, National Indian Gaming Association, Oregon State Police, the U.S. Department of Transportation, the Nevada and Washington State gambling commissions, Oregon Racing Commission, and the Oregon Department of Justice. Population and personal income data comes from the U.S. Bureau of Economic Analysis.

Data for OTGA non-member tribes were estimated using primarily casino visitor volume statistics from Placer.ai—an aggregator of smart phone location and demographic data.

## Major Findings

In 2023, eight Tribes operated ten gaming facilities in Oregon. Eight were casinos and two were Class-II (video bingo machine) facilities. Besides gaming, the tribe’s casino businesses offered other amenities including hotels, restaurants, RV parks, golf courses, shops, conference centers, movie theaters, and other entertainment venues.

In 2023, Tribal casinos and resorts employed 4,439 workers and supported the employment of another 662 jobs for their Tribal governments. In total these workers were paid \$378.9 million in wages and benefits.

Since Tribes employ almost exclusively Oregonians and mostly buy goods and services from Oregon businesses, tribal gaming had major indirect impacts on the rest of the state economy. In addition to their direct impacts, in 2023 tribal gaming positively influenced many aspects of the state’s economy:

- Tribal gaming directly and indirectly supported 10,855 jobs statewide earning \$773 million in wages, benefits, and self-employment earnings.
- Tribal gaming indirectly supported businesses and governments in Oregon by an amount totaling \$1.03 billion in output—not counting what the Tribes made.
- Over 4.8 million visits were made to Oregon casinos.
- Tribal gaming impacted government revenues including \$54.6 million for the state of Oregon, \$20.3 million for local government, and \$160.9 million for the federal government.



- Tribal casinos spent \$16 million on gaming regulation. Tribes paid \$2.2 million to the Oregon State Police and over \$581,000 to federal government gaming regulators.
- Including casinos, hotels, restaurants, and other amenities, tribal gaming businesses reported \$738.0 million in revenue. From that, the casinos provided \$131.1 million to their Tribes; most of it paying for member healthcare, social services, and public works.
- Tribes donated and granted over \$12.5 million to local charities in 2023 and \$220 million since 1992—the year the first casino opened in Oregon.
- Tribal casino hotels sold over 442,022 room nights to guests visiting the rural Oregon communities where their hotels are located.
- The dominance and locational advantages of the Oregon Lottery have reduced the market share of tribal casinos from its peak of 35.5 percent in 2004 to 30.5 percent in 2023.



# 1. Oregon Casinos and Tribes

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There are nine federally recognized Tribes based in Oregon. Eight Tribes operate casinos. The first casino opened thirty-two years ago.

Although Tribes are sovereign nations, the State of Oregon exercises considerable control over the size and location, types of games, regulations, and other important features of tribal casinos. To build and run a casino, a Tribe and the Governor must first negotiate an agreement or compact (currently, in Oregon, these are called “Class-III Gaming Compacts”) that determines the key features of the casino. Class-III games include most of the games found in casinos: video lottery terminals (VLTs), roulette, craps, blackjack, keno, and the like. VLTs are commonly known as slot machines.

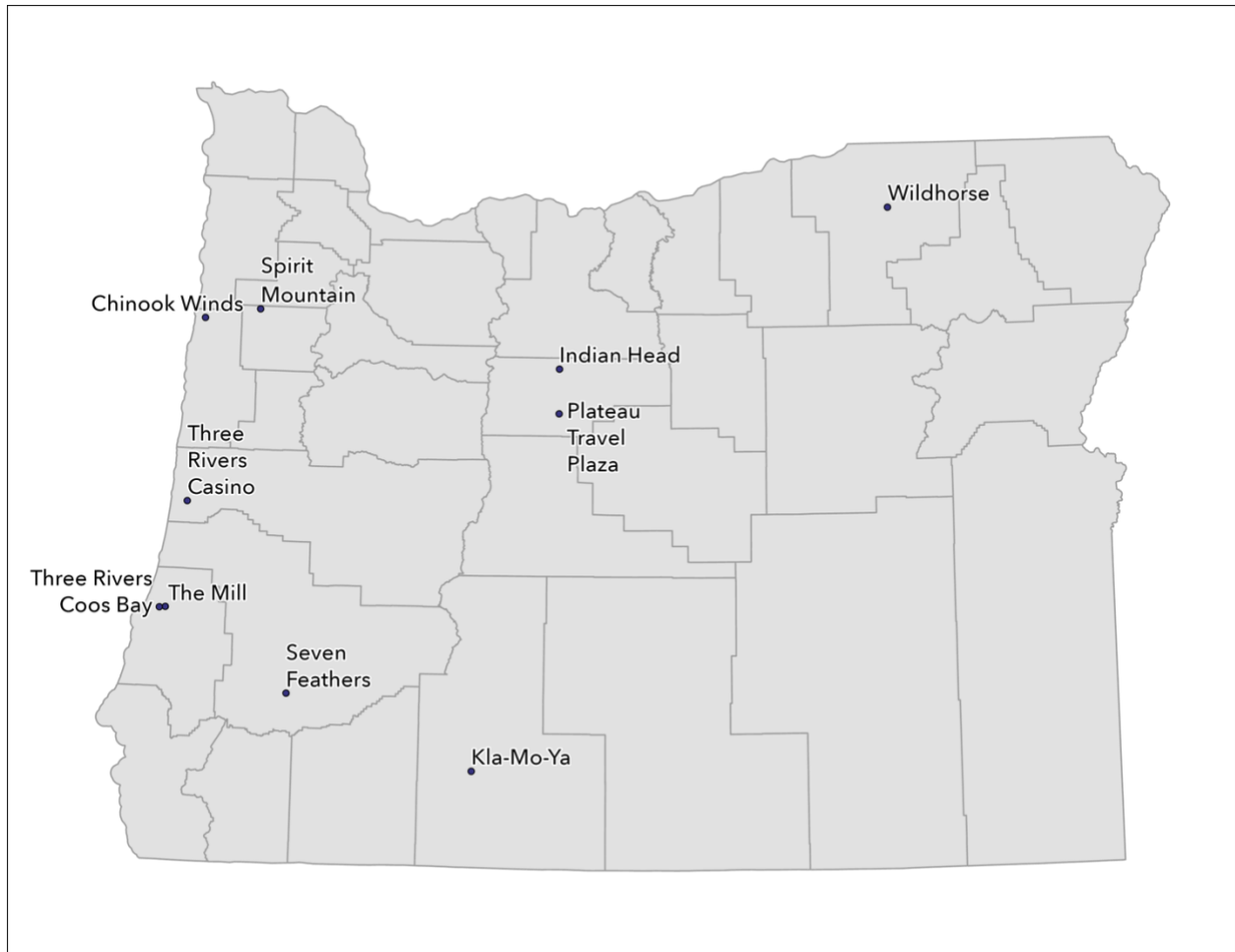
There is also Class-II gaming. Tribes, not the State, have full control over Class-II games. With Class-II games, players compete against one another rather than against the house (casino). Examples include poker, bingo, and raffle games. There can be live bingo games and also bingo can be networked electronically and run on machines that simulate VLTs. There are two facilities in Oregon that contain all Class-II bingo VLTs. Class-III casinos can also have Class-II VLTs.

## Casinos in 2023

Casinos are located on tribal lands, which are mostly in non-urban areas. The average town in Oregon with a tribal casino in 2023 had 7,863 residents. Because of their locations, Tribes are major drivers of the rural Oregon economy through their employment and spending, and ability to stimulate tourism. Exhibit 1 is a map of the casinos that operated from 2020 through 2023.



## Exhibit 1: Tribal Casinos in Oregon, 2020-2023



Tribes are limited to operating one class 3 casino each and the casinos must be on tribal land. One tribe, the Burns Paiute, currently does not operate a casino. Two tribes, Confederated Tribes of Warm Springs and Confederated Tribes of the Coos, Lower Umpqua & Siuslaw Indians, each operate one class 3 casino and one class 2 casino. No new casinos have been built in Oregon since 2018. Table 1 lists the names, locations, tribal ownerships, the number of hotel guest rooms, and opening dates of the tribal gaming facilities operating in 2023.<sup>1</sup> Statewide, in 2023 there were 1,463 hotel guest rooms.

<sup>1</sup> Opening dates refer to a tribe's first gaming operations whether in a permanent or temporary facility. The Wildhorse and Chinook Winds casinos started in temporary structures. Three Rivers also began in a temporary structure that was replaced with a permanent casino building in late 2007. The Warm Springs relocated to a new casino in 2012.

**Table 1: Tribal Casinos in Oregon, 2023**

Casino	City	Population	Tribe	Opened	Hotel Rooms
Chinook Winds	Lincoln City	10,372	Confederated Tribes of Siletz Indians	May 1995	240
Indian Head	Warm Springs	2,204	Confederated Tribes of Warm Springs	May 1995	-
Kla-Mo-Ya	Chiloquin	775	The Klamath Tribes	July 1997	74
Plateau Travel Plaza*	Madras	8,099	Confederated Tribes of Warm Springs	April 2018	-
Seven Feathers	Canyonville	1,703	Cow Creek Band of Umpqua Tribe of Indians	April 1994	298
Spirit Mountain	Grand Ronde	1,341	Confederated Tribes of Grand Ronde	October 1995	254
The Mill	North Bend	10,769	Coquille Indian Tribe	May 1995	203
Three Rivers Casino	Florence	9,832	Confederated Tribes of the Coos, Lower Umpqua & Siuslaw Indians	June 2004	93
Three Rivers Coos Bay*	Coos Bay	16,533	Confederated Tribes of the Coos, Lower Umpqua & Siuslaw Indians	May 2015	-
Wildhorse	Pendleton	17,006	Confederated Tribes of the Umatilla Indian Reservation	Nov 1994	301
Average population		7,863		Total rooms ->	1,463

\* Class-II gaming facility.

Sources: US Census, PSU Population survey (2023), and STR Global.

The first Indian gaming facility in Oregon was the Cow Creek Bingo Hall. It opened April 1992 in Canyonville, a town 28 miles south of Roseburg. On April 29, 1994, the Seven Feathers Casino replaced the bingo hall. Other casinos quickly opened and by the end of 1995, five other Tribes had their own casinos.

The Burns-Paiute Tribe opened the Old Camp Casino August 1998 in Burns, Oregon. The casino closed November 25, 2012.

The Confederated Tribes of Warm Springs opened a casino at the Kah-Nee-Ta Resort in 2001. The casino closed in 2011. It was replaced with a new casino in Warm Springs in February 2012.

In April 2018 the Warm Springs opened a Class-II gaming facility in the Plateau Travel Plaza in Madras. On May 2015, the Confederated Tribes of the Coos, Lower Umpqua, and Siuslaw Indians opened a Class-II gaming facility in Coos Bay.

The initial gaming compacts limited Tribes to only one type of casino table game—blackjack. In January 1997, the Grand Ronde negotiated a change that allowed them to install roulette, craps, and other casino table games in exchange for funding a charitable foundation with a share of the casino's profits. Since then, the Coos, Lower Umpqua, and Siuslaw, the Siletz, Cow Creek, Coquille, and Umatilla have amended their compacts similarly.

## Casino Capacity

Tribes in Oregon operated eight Class-III casinos and two Class-II gaming facilities between 2020 and 2023 that held 7,314 VLTs. Four casinos also offered Keno. Since the Oregon Lottery is able to place VLTs and Keno wagering machines at retailers throughout the state, they have more VLTS and Keno than the tribes. The Oregon Lottery reported that at year-end 2023, they had 10,804 VLTs in 2,211 locations throughout Oregon and also had 3,254 active keno retailers. Tribal casinos had 107 house-banked table games (e.g., blackjack, craps, roulette), 12 poker tables, and 1,040 seats in five bingo halls. All ten tribal facilities had restaurants and lounges.



**Table 2: Oregon Tribal Casino & Lottery Gaming Capacity, 2023**

<b>Gaming Venue in Oregon</b>	<b>VLTs</b>	<b>Table Games</b>	<b>Poker Tables***</b>	<b>Bingo Seats</b>	<b>Keno Wagering Outlets</b>	<b>Sports Book</b>
<b>Tribal casinos</b>						
Chinook Winds*	980	19	3	400	1	1
Indian Head	505	6	-	-	-	-
Kla-Mo-Ya	288	-	-	-	-	-
Plateau Travel Plaza**	42	-	-	-	-	-
Seven Feathers	950	21	-	360	-	-
Spirit Mountain	1,759	27	-	-	1	1
The Mill	600	8	-	-	-	1
Three Rivers Casino	823	12	5	80	1	1
Three Rivers Coos Bay**	260	-	-	-	-	-
Wildhorse	1,107	14	4	200	1	-
<b>Total Tribal Gaming</b>	<b>7,314</b>	<b>107</b>	<b>12</b>	<b>1,040</b>	<b>4</b>	<b>4</b>
<b>Oregon Lottery:</b>						
<b>At lottery retailers</b>	<b>10,804</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>3,254</b>	<b>1</b>

\* Chinook Winds sets up poker tables for periodic tournaments.

\*\* This facility's VLTs are class-II bingo machines.

\*\*\* Social poker games in public places are legal in several Oregon towns and cities.

Sources: OTGA members, casino websites, and the Oregon Lottery.

There have been no major changes in the number of games or the mix of games available at tribal casinos or through the Oregon Lottery. The number of VLTs at tribal casinos peaked at 7,611 in 2015 and has since declined. The Oregon Lottery also reduced the number of VLTs in the last four years, as shown in Table 3. Only 4 Tribes offer on-site sports betting and wagers must be placed from inside the casino. The Oregon Lottery takes sports bets throughout Oregon via smartphone apps.

**Table 3: Trends in Gaming Capacity, 2015 to 2023**

<b>Game Type and Location*</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>At Tribal Casinos:</b>									
VLTs	7,611	7,583	7,465	7,382	7,380	6,844	7,263	7,201	7,301
Table games	111	113	113	111	114	105	107	115	107
Poker tables*	23	20	20	20	19	7	7	12	12
Bingo seats	1,287	1,823	1,705	1,365	1,365	1,040	1,040	1,040	1,040
<b>At Oregon Lottery Retailers:</b>									
VLT machines	11,907	11,926	11,742	11,619	11,530	10,759	11,019	10,808	10,804
Video Lottery retailers	2,232	2,233	2,222	2,200	2,186	2,299	2,192	2,243	2,211
Retailers with keno	3,259	3,285	3,298	3,301	3,203	3,461	3,409	3,377	3,354
All retailers	3,939	3,920	3,932	3,918	3,913	4,115	4,032	4,041	3,985

\* Two tribal casinos offered on-site sports betting from 2019-2021, three tribes in 2022, and four did in 2023. The Oregon Lottery offers sports betting statewide on mobile phones.

Sources: OTGA members, casino websites, and the Oregon Lottery.

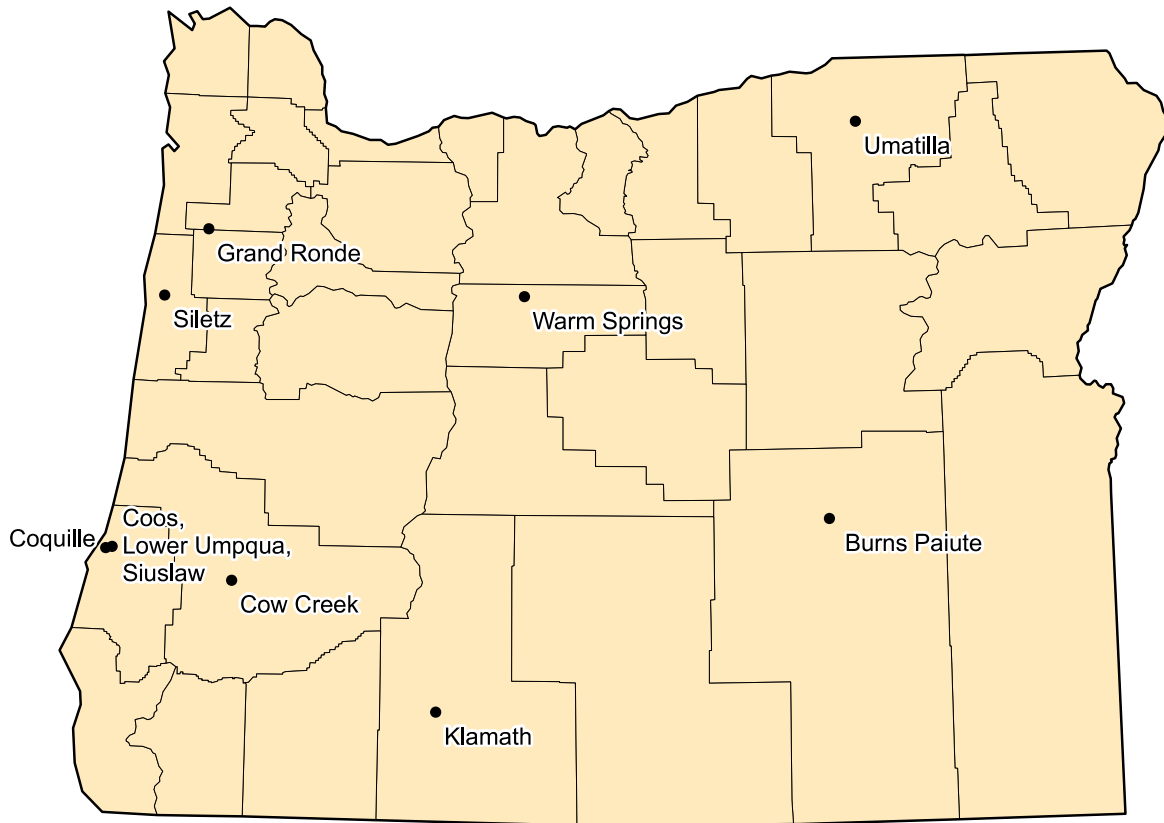




## Tribes in Oregon

Figure 2 shows a map of the principal locations of the nine federally recognized Tribes that are based in Oregon. Beside the areas noted on this map, most Tribes have land parcels that are not contiguous to these principal locations.

**Figure 2: Tribes based in Oregon, locations of headquarters**



Sources: ECONorthwest and websites of tribal governments.

In addition to the nine Tribes, a portion of the Fort McDermitt Paiute Shoshone Indian Reservation extends into the southeastern Oregon. That tribe, however, is based in Nevada. Also, the Celilo-Wyam, a non-federally recognized intertribal Indian community, has joint use of the Celilo Village trust land property in Wasco County near the site of the former Celilo Falls.

## The Burns Paiute Tribe

The 420 members of the Burns Paiute Tribe descend from the Wadatika band of Paiute.<sup>2</sup> They lived and seasonally migrated over a vast 5,200 square mile territory.<sup>3</sup> It extended from the Cascade Mountain Range in central Oregon to the Payette Valley north of Boise, Idaho, and from southern parts of the Blue Mountains near the headwaters of the Powder River north of John Day, to the desert south of Steens Mountain.

In 1873, a 1.8 million-acre Malheur Reservation was formed in southeastern Oregon for the Tribes of the region. This land was taken from the Tribes. In the winter of 1879, over 500 Paiute were marched to Washington and forced to relocate on the Yakama Reservation and Fort Vancouver. Many of those at Fort Vancouver subsequently were relocated to the Warm Springs Reservation.

Many of the members of the Wadatika band on the Yakama Reservation moved back to Burns. In 1928, a local land company gave the Burns Paiute 10 acres of land just outside the city. In 1969, after a 35-year court case, the tribe was awarded a small sum of money for the lands taken from the Malheur Reservation. In 1972, the Burns Paiute were recognized as an independent Indian Tribe. Today the Burns Paiute reservation covers just 770 acres north of the City of Burns in Harney County. The Tribe's Old Camp Casino Washington was located there as well.

The Burns Paiute opened the Old Camp Casino in August 1998 using a previously closed casino moved from the Lummi Nation in Bellingham, Washington. Physical deterioration and a weak local market led to the Tribe to close Old Camp on November 25, 2012. The Burns Paiute Tribe hopes to build a new casino.

## The Confederated Tribes of the Coos, Lower Umpqua, and Siuslaw Indians

The Coos, Lower Umpqua, and Siuslaw Indians are three Tribes organized into a confederation of 1,314 members.<sup>4</sup> They occupied southwest Oregon coastal areas along the three major rivers in Coos, Douglas, and Lane Counties that were named after the Tribes.

In 1855, coastal Tribes signed a treaty with the U.S. Government, but a year later the Rogue River War broke out south of Coos Bay and the U.S. Army, in a preemptive strike, rounded up the Coos Indians and forced them to live in an encampment. The Lower Umpqua Indians were soon forced in as well. Both Tribes later refused to relocate to the Siletz Reservation and, instead, joined the Siuslaw Indians. In 1918, the three Tribes formed a confederation and pursued land claims they were entitled to under the 1855 treaty.

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<sup>2</sup> Tribal membership for the Burns Paiute and other Tribes as reported in the 2021 2022 Oregon Blue Book available at <https://sos.oregon.gov/blue-book/Pages/national-tribes-burns.aspx>

<sup>3</sup> <https://www.burnspaiute-nsn.gov/>

<sup>4</sup> <https://sos.oregon.gov/blue-book/Pages/national-tribes-coos.aspx>



Under a program by the Eisenhower administration in the 1950's, the U.S. Congress terminated the Confederated Tribes of Coos, Lower Umpqua, and Siuslaw Indians along with all other Tribes of western Oregon. In 1984, after a long battle, the status of the Confederated Tribes of Coos, Lower Umpqua, and Siuslaw Indians was restored.

The Coos, Lower Umpqua, and Siuslaw operate the Three Rivers Casino & Hotel off Highway 126, a mile east of Florence. The casino opened in 2004, was expanded and added a hotel in 2007, and has plans to expand its hotel and add an RV park. In 2015, they opened a 15,000 SF Class-II casino in Coos Bay.

## Coquille Indian Tribe

The Coquille Indian Tribe descended from people who inhabited the watershed of the Coquille River system, which covers approximately the region around the present-day cities of Bandon, Coos Bay, and North Bend on the southern Oregon coast.

The tribe signed treaties with the U.S. Government in 1851 and 1855, which ceded 700,000 acres of ancestral territory; however, the treaties were never ratified by Congress, so the Coquille were denied a permanent homeland. The tribe was terminated by the Eisenhower administration in 1954, but then subsequently restored by Congress in June 1989. The Coquille Indians were then able to acquire several land parcels.

The Coquille Indian Tribe has 1,171 members and owns the Mill Casino-Hotel and the Mill RV Park in North Bend, Oregon.<sup>5</sup> It overlooks the Coos Bay waterfront off highway US-101. The casino has prospered because it offers highly competitive accommodations on the southern Oregon coast and is a much-needed entertainment venue for locals. The Coquille Tribe completed a hotel and casino expansion that doubled its hotel capacity in 2008 and increased the overall beauty and functionality of its gaming area.

## Cow Creek Band of Umpqua Tribe of Indians

Survival has always been a part of the story of the Cow Creek Band of Umpqua Tribe of Indians. For centuries, they were known as the *Nahánk<sup>h</sup>uotana*, living throughout the area surrounding the Umpqua and Rogue valleys of Southern Oregon. Their language was Takelma, which means “those living alongside the river.”

Since time immemorial, they lived and hunted together in the meadows, forests and riverbanks of the area, following a traditional seasonal round. Salmon, steelhead, lamprey, tarweed, acorns, camas and other natural foods influenced where Cow Creek Umpqua people lived each summer and winter.

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<sup>5</sup> <https://sos.oregon.gov/blue-book/Pages/national-tribes-coquille.aspx>



When trappers, miners and settlers arrived in Southern Oregon in the 1800's, there was a shift in relations with Indians. After surviving a deadly winter epidemic, the *Naháñk<sup>h</sup>uotana* sought peace and security by signing a treaty with the U.S. Government in 1853. The treaty was signed near Council Creek and Cow Creek, giving Cow Creek Umpqua people their modern name today.

The treaty ceded hundreds of square miles of land for about \$12,000, a few barrels of clothes and fabric. Cow Creek Umpqua people were sent to reservations, where they were surrounded by illness and hunger. Many families chose to hide rather than live on a reservation.

In 1954, Congress terminated the Cow Creek Umpqua Tribe without their knowledge or consent. After years of persistence to organize and lobby for recognition, President Ronald Regan signed a law federally recognizing the Cow Creek Band of Umpqua Tribe of Indians as a sovereign nation in 1982.

Once known as a landless Tribe, the Cow Creek Umpqua has reacquired 48,000 acres of their own ancestral homeland. Today, there are about 2,000 Cow Creek Umpqua Tribal citizens, with a majority living in Douglas County and Southern Oregon.

The Cow Creek Band of Umpqua Tribe of Indians is one of the largest employers in Douglas County and operates the nationally recognized Seven Feathers Casino Resort, a leader in hospitality and entertainment in the industry.

## Confederated Tribes of Grand Ronde

The Confederated Tribes of the Grand Ronde Community of Oregon ("Grand Ronde") is comprised of nearly 30 Tribes and bands whose traditional homelands extend from northern California to the north shore of the Columbia River. It is the largest tribe based in Oregon, having about 5,623 members.<sup>6</sup>

The antecedent Tribes and bands of Grand Ronde, including the Kalapuya, Umpqua, Molalla, Rogue River, and Chasta, ceded their homelands to the United States through seven ratified treaties: 1853 Treaty with the Rogue River, 1853 Treaty with the Umpqua – Cow Creek Band, 1854 Treaty with the Rogue River, 1854 Treaty with the Chasta, etc., 1854 Treaty with the Umpqua and Kalapuya, 1855 Treaty with the Kalapuya, etc., and 1855 Treaty with the Molalla.

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<sup>6</sup> <https://sos.oregon.gov/blue-book/Pages/national-tribes-grand-ronde.aspx>



With the treaties came the forced removal in 1856 of Tribes and bands to an area that would become the Grand Ronde Reservation (President James Buchanan's executive order of June 30, 1857 officially established the Grand Ronde Reservation). The Reservation, (approximately 69,000 acres) was on the eastern side of the Coast Range, on the headwaters of the South Yamhill River, about 60 miles southwest of Portland, and about 25 miles from the ocean. Over time, much of the original Reservation land was stripped from Grand Ronde by ill-conceived federal policies.

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In 1954, Congress terminated the federal recognition of the Grand Ronde Tribes. The Tribal members were left with little more than a ten-acre cemetery and maintenance shed. Their federally recognized status was gone, but the people of Grand Ronde continued as a community and Tribal leaders worked tirelessly to restore the Grand Ronde's status as a federally recognized tribe.

Their efforts led to the signing of the Grand Ronde Restoration Act on November 22, 1983. Five years later, President Ronald Reagan restored 9,811 acres of the original Reservation to Grand Ronde.

Grand Ronde owns and operates Spirit Mountain Casino, which is on the main east-west route between Portland and Lincoln City. It is the largest casino in Oregon. Each year, Grand Ronde dedicates six percent of the casino profits to the Spirit Mountain Community Fund, which supports non-profit organizations in western Oregon. Since the fund was established in 1997, Grand Ronde has donated over \$82 million to assist Oregon non-profit groups and civic institutions.

Since opening in 1995, Spirit Mountain Casino has undergone four major expansions culminating in a new events center and hotel addition in 2009. In 2016, the casino underwent a major renovation that included Oregon's first separate non-smoking area. Spirit Mountain is one of the largest employers in the Polk-Yamhill County area.



## The Klamath Tribes

For thousands of years, the Klamath Basin of southern Oregon has been the traditional homeland for the Klamath Tribes, who are composed of the Klamath Tribe, the Modoc Tribe, and the Yahooskin Band of Snake Indians. There are about 5,200 members of the Klamath Tribes.<sup>7</sup>

After decades of hostilities with newcomers, the Tribes ceded 23 million acres in 1864 and moved to a 1.8-million-acre reservation. The Klamath Tribes were very resourceful and built highly successful cattle and lumber operations on their lands.

By the 1950's, the Klamath were one of the wealthiest Tribes in the country. That ended abruptly when the U.S. Congress passed the Klamath Termination Act. The Klamath Tribes were restored in 1986, but their land was not returned. In early 2009, they owned 890 checker-boarded acres in trust.

Gradually, the Klamath Tribes are rebuilding their economy. In 1997, they opened their first business since termination—the Kla-Mo-Ya Casino, named for an acronym of the three Tribes.<sup>8</sup> Kla-Mo-Ya is off US-97, the main north-south route of central Oregon, in the town of Chiloquin. The casino is a popular gaming destination for residents in the Klamath Falls area but has also become an attraction for tourists traveling on the highway. In 2010, to encourage more travelers to visit, the Klamath Tribes opened the 7,800 square foot Crater Lake Junction Travel Center, which sells fuel, convenience items, food, and services for truck drivers. In November 2018, they opened a 74-room hotel.

## Confederated Tribes of Siletz Indians

The Siletz are a federally recognized confederation of many bands originating from northern California, western Oregon, and southwest Washington. In 1856, they ceded 19 million acres to the U.S. and agreed to confederate on the Siletz Reservation on the central Oregon Coast.

In 1865 and 1875, 900,000 acres of the “permanent reservation” were opened to settlement by presidential and congressional actions. Additional lands were lost through allotment and forced fee policies. By 1912, over half of the Siletz Indian allotments were no longer Indian owned.

The Confederated Tribes of Siletz Indians were terminated in 1954-56, but in 1977, the Siletz became the first tribe in Oregon and second in the U.S. to gain restoration. The Siletz have a 3,666-acre reservation in Lincoln County and 5,089 members.<sup>9</sup>

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<sup>7</sup> <https://sos.oregon.gov/blue-book/Pages/national-tribes-klamath.aspx>

<sup>8</sup> [https://www.casinocareers.com/clientsb.php?OurClients\\_ID=44](https://www.casinocareers.com/clientsb.php?OurClients_ID=44)

<sup>9</sup> <https://sos.oregon.gov/blue-book/Pages/national-tribes-siletz.aspx>



The Confederated Tribes of Siletz Indians operate the Chinook Winds Casino in Lincoln City—a major coastal tourist community. They recently acquired and renovated a large oceanfront hotel next to the casino and have added a golf course and RV park to their repertoire of visitor amenities.

## **Confederated Tribes of the Umatilla Indian Reservation (CTUIR)**

The Confederated Tribes of the Umatilla Indian Reservation was established in 1855 by a treaty signed by the U.S. Government and the Cayuse, Umatilla, and Walla Walla Tribes. The three Tribes occupied over 6.4 million acres of the Columbia River Plateau of southeastern Washington and northeastern Oregon. Of the 510,000 acres that were set aside in the 1855 Treaty as the Umatilla Indian Reservation, only 174,874 acres remain part of the Reservation, and non-Indians own 40 percent of the acreage. Tribal enrollment is about 3,152.<sup>10</sup>

The CTUIR government provides a broad array of services to Reservation residents and the region including:

- a) Police, fire, and emergency response services throughout the Reservation.
- b) A Natural Resources Department that protects and manages fisheries, wildlife, cultural resources throughout the Tribe's aboriginal lands.
- c) A Science and Engineering Department that oversees clean-up of the Hanford Nuclear Reservation and the Umatilla Chemical Depot.
- d) Medical, dental, and mental health services offered at the Yellowhawk Tribal Health Clinic.
- e) The Nixya'awii Community School providing culturally sensitive high school education to Reservation students.
- f) A Tribal Court system that adjudicates civil and criminal disputes within the Reservation.
- g) Housing services for low-income families.
- h) Social services to meet the needs of the elderly, children, and families in need; and
- i) Tribal regulatory agencies regulating land use, water use and permitting, public health and safety, gaming, and other regulatory functions.

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<sup>10</sup> <https://sos.oregon.gov/blue-book/Pages/national-tribes-umatilla.aspx>



The Tribal government employs approximately 450. The CTUIR owns and operates the Wildhorse Resort & Casino, which is located off Interstate-84 a few miles east of Pendleton – the largest city in Umatilla County. The Wildhorse Resort includes a golf course, RV park and hotel. Immediately adjacent to Wildhorse are the tribally owned and operated Tamástslikt Cultural Institute and the Arrowhead Travel Plaza providing additional attractions and services to Wildhorse patrons. Wildhorse draws visitors from the Tri-Cities and Walla Walla Washington area as well as the steady stream of tourists and truck drivers who travel I-84.

Wildhorse completed an expansion in September 2011 with a 10-story 202-room hotel, five-screen cinema, swimming pool, more casino floor space, and retail stores. In 2020, Wildhorse added a 24-lane bowling alley, food court, family friendly arcade and a new golf course clubhouse with a restaurant and banquet room. Wildhorse commenced construction in late 2024 on another 10-story hotel tower, 1500 seat convention/event center and new restaurant. The project will be completed in early 2027.

## The Confederated Tribes of Warm Springs

The Confederated Tribes of Warm Springs consist of three distinct Tribes. The Wasco and Walla Walla (later called the Warm Springs) bands lived along the Columbia River and its tributaries; they often would trade with one another; but they had separate cultures and languages. The Paiute occupied the high deserts of southeastern Oregon and rarely had contact with the Wasco or Warm Springs.

In 1855, the U.S. government and the Wasco and Warm Springs Tribes signed a treaty, which created the Warm Springs Reservation. It is located south of the Columbia River between the Cascade Mountains and the Deschutes River in north central Oregon. In 1879, the U.S. government began settling Paiute Indians from Fort Vancouver onto the Warm Springs Reservation. The three Tribes, in 1937, organized themselves as The Confederated Tribes of Warm Springs Reservation of Oregon. Enrollment is 5,363.<sup>11</sup>

The Warm Springs built forest products and tourism businesses on their reservation. In 1964, they opened Kah-Nee-Ta Village near a natural hot spring deep in Indian Head Canyon. In 1972, they added the 139-room Kah-Nee-Ta Lodge. They added casino gaming at the lodge in 1995.

The Warm Springs closed the casino at Kah-Nee-Ta in early 2012 and replaced it with the Indian Head Casino. Located 14 miles from Kah-Nee-Ta, the new casino is larger and easier to get to for most travelers. The Warm Springs opened a travel center in 2018. It includes a large convenience store/gift shop, truck and passenger vehicle refueling area, café, and a 30-machine Class-II gaming center.

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<sup>11</sup> <https://sos.oregon.gov/blue-book/Pages/national-tribes-warm-springs.aspx>



## Gaming Regulation and Surveillance

Indian casinos in Oregon are the most heavily regulated form of gaming in Oregon based on costs. In 2023, Oregon Tribes account for 50 percent of all the money spent annually on gaming regulation; even though their casinos accounted for 30 percent of the gaming done in the state. In 2023, Oregon Tribes spent \$28 for every thousand in casino gaming on regulatory costs compared to \$6 by the Oregon Lottery.

There are three independently acting entities directly involved in regulating the operations of tribal casinos in Oregon. The first entity is the gaming commissions. They are independent of casino management, but part of tribal government. Commissions license employees, monitor games to ensure legal compliance and fairness, establish control standards, and conduct audits.

The second regulator is the State of Oregon through the Tribal Gaming Section of the Oregon State Police (“OSP”). The OSP monitor casinos, run background checks on casino employees and suppliers, and ensure the integrity and fairness of games. Fees negotiated with the Tribes totaled \$2,234,369 in 2023. Manufacturers of gaming equipment paid \$649,742 to the OSP in 2023.

The National Indian Gaming Commission (“NIGC”) is an independent agency of the federal government that regulates tribal casinos. The NIGC’s mission is to see that Indian Tribes are the fair beneficiaries of gaming revenue, assure that gaming is conducted honestly, and to shield Tribes from corrupting influences. They do this by conducting audits, private investigations, and background checks. The NIGC is funded entirely by Indian casinos. Tribes in Oregon paid \$581,855 to the NIGC.

Statewide, \$32.1 million was spent on all forms of gaming regulation in 2023. Of this, tribal casinos paid \$16.2 million. The Oregon Lottery spent \$8.3 million. The state spent about \$7 million regulating charitable gaming and horse racing in 2023. The breakout of costs and total costs paid to gaming regulators in Oregon are provided in Table 4.



**Table 4: Gaming Regulatory Spending in Oregon, 2020 - 2023**

<b>Gaming Regulators in Oregon</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<u>Regulatory costs paid by tribes:</u>				
Oregon State Police - tribal gaming section	\$1,907,248	\$2,063,533	\$2,103,329	\$2,234,369
Individual tribal gaming commissions	8,018,120	8,697,008	12,105,785	13,351,174
National Indian Gaming Commission	355,606	456,285	483,504	581,855
<b>Paid by Oregon Tribes</b>	<b>\$10,280,975</b>	<b>\$11,216,826</b>	<b>\$14,692,617</b>	<b>\$16,167,398</b>
<u>Oregon Lottery:</u>				
Payment to Oregon State Police from Lottery	\$3,843,479	\$3,716,005	\$3,950,083	\$3,628,195
Lottery security salaries	2,876,875	2,806,233	3,533,756	3,915,516
All other lottery security expenses	119,489	349,344	237,053	743,922
<b>Total OR Lottery regulatory costs</b>	<b>\$6,839,843</b>	<b>\$6,871,582</b>	<b>\$7,720,892</b>	<b>\$8,287,633</b>
OSP regulation paid by gaming machine vendors	\$559,130	\$596,935	\$634,241	\$649,742
Charitable bingo, raffles & fundraisers	3,300,475	3,126,467	2,952,458	3,070,112
Horse racing	1,949,829	3,350,000	3,750,000	3,875,000
<b>Total Gaming Regulation</b>	<b>\$22,930,252</b>	<b>\$25,161,810</b>	<b>\$29,750,208</b>	<b>\$32,049,885</b>

*Sources: Oregon Lottery, Oregon Tribes, and Oregon Legislative budget reports.*



## 2. Economic Impacts

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In Oregon, Indian Tribes rely on gaming to maintain their independence and self-sufficiency. In addition to stable, well-paying jobs, tribal gaming supports a range of essential services including healthcare, housing, and education. Gaming revenues also contribute to improving local infrastructure and benefitting charitable organizations.

Gaming operations also help the state economy. Tribal resort casinos are major contributors to Oregon's tourism industry. They attract visitors who bring new money into the state economy, some of which would not occur without gaming. Tribal gaming provides employment, improving standards of living and decreasing reliance on state and federal assistance in the rural communities where casinos operate.

This section describes the economic and fiscal impacts of tribal gaming from 2020 through 2023. The principal drivers of these impacts are the spending, contributions, and jobs supported by the casinos and their associated hotels and related businesses. In addition, we include similar spending and employment created at tribal government levels that are paid for through the revenues from gaming.

### Economic Impact Analysis

The economic impact analysis calculates how tribal gaming affects the Oregon economy. This is accomplished using complex computer software that models economic transactions between individuals and businesses. The software used for this analysis is called IMPLAN. It relies on public economic data to track money as it circulates within the state.

The economic model created using IMPLAN was customized to reflect the specific expenditures of Oregon casinos, tribal governments, and affiliated businesses. For example, tribal casinos in Oregon spend more on employee benefits, charitable contributions, and government services than privately owned casinos elsewhere. Customizing using actual Oregon tribal data addresses such differences.

Tribal casinos purchase goods and services and pay their employees. This generates subsequent impacts elsewhere in the economy as the recipients of the casinos' spending make purchases of their own. This re-spending process continues until the money is eventually saved, taxed, or spent outside the state.



Economic impact analysis uses specific language to refer to different measurements of economic activity:

- ◆ **Output** is the broadest measure of economic activity. Output is the value of goods and services produced. For tribal gaming facilities, output is the sum of gaming, lodging, and restaurant revenues. For this analysis, tribal government output is the portion of government spending paid for by gaming activity.
- ◆ **Labor Income & Benefits** are employers total payroll costs, including workers' salaries, benefits (e.g., health insurance and retirement accounts), gratuities, and payroll taxes plus the earnings of self-employed workers.
- ◆ **Jobs** include both full-time and part-time employees and those that are self-employed. One job consists of 12 months of full-time or part-time work. For example, one person working 12 months or two people working 6 months both count as one job.

## Types of Impacts

The IMPLAN software measures three types of impacts, according to their relationship to the initial activity at tribal casinos:

- ◆ **Direct impacts** are the activities occurring at tribal casinos and their affiliated businesses. These include casino employees, their wages, and total casino revenues. Direct impacts also count the activities of tribal government that are paid for with casino revenues.
- ◆ **Indirect impacts** are the business-to-business transactions that occur because of tribal gaming. When an Oregon casino purchases goods and services from other Oregon businesses, the amount of these sales represents indirect output. These businesses will purchase additional goods and services; this spending results in additional rounds of indirect impacts. Because they represent interactions among businesses, these indirect effects are often referred to as “supply-chain” impacts.
- ◆ **Induced impacts** are purchases of goods and services by household incomes. The direct and indirect impacts increase employment and income in the state of Oregon, thereby inducing further consumption. Casino and tribal government employees, for example, will use their income to purchase groceries or take their children to the doctor. These induced impacts are often as consumption-driven impacts.

It is important to note that this analysis measures the gross impacts. Gross impacts include all economic impacts attributable to tribal gaming, regardless of what impacts would have occurred without the casinos. In other words, the impacts in this report do not consider potential substitution effects. An example would be a casino visitor who, in the absence of tribal casinos, would visit another Oregon entertainment destination.



## Tribal Operations in 2020 Through 2023

Tribal casinos in Oregon had net revenues of \$738 million in 2023—an increase of \$12.4 million since 2022. Table 5 shows revenue and expenditure details for tribal casinos in 2020, 2021, 2022, and 2023. Revenues plunged at tribal casinos in 2020 due to COVID, but they saw a resurgence in 2021 as patrons returned to local casinos rather than traveling out of state to casinos. In 2022, revenues eased and have since been growing. In response to COVID, some tribal casinos went non-smoking.

**Table 5: Tribal Casino Revenues and Selected Expenditures, 2020 - 2023**

<b>Revenues &amp; Expenditures</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<u>Revenues</u>				
Gaming	\$493,880,320	\$705,962,488	\$648,950,081	\$660,223,923
Food & beverage sales	42,053,030	63,707,556	69,620,618	78,576,436
Hotel & lodging	29,193,806	44,326,749	48,671,523	51,349,550
Gift shops, recreation & other	30,543,560	31,038,030	33,857,871	35,570,861
Less complimentary goods & services	(49,493,509)	(75,808,733)	(75,527,355)	(87,716,365)
<b>Total Net Revenue</b>	<b>\$546,177,207</b>	<b>\$769,226,090</b>	<b>\$725,572,738</b>	<b>\$738,004,404</b>
<u>Selected Expenditures</u>				
Labor	\$223,853,930	\$267,766,499	\$288,781,548	\$319,108,366
Utilities	11,056,642	13,063,788	12,762,237	14,074,105
Advertising, marketing, & sales	24,768,906	33,259,052	35,707,720	40,159,773
Costs of goods sold	23,392,808	37,124,146	40,215,561	46,174,539
Repairs & maintenance	5,709,017	7,813,081	8,436,998	9,098,383
Supplies	12,394,781	14,714,220	15,219,754	16,510,819
Professional services	6,090,189	8,233,452	9,437,333	11,812,795
Entertainment	1,709,761	2,931,458	4,086,930	5,922,242
Construction & equipment purchases	46,223,666	34,910,861	46,909,728	42,846,388
Other operating expenses	30,075,035	65,001,407	68,071,538	73,647,058
Tribal government & support	116,566,807	119,656,930	111,963,120	131,120,283

Source: Tribal reports and estimates by ECONorthwest.

Labor is the largest cost facing casinos. Other major expenditures include marketing, construction, and the cost of goods sold, such as food and soft drinks. About \$131.1 million from gaming operations in 2023 went to tribal government and tribal member support. This includes remittances to tribal government to pay for tribal healthcare, social services, education, and basic operations. It also includes community contributions and payment to tribal members and elders to help offset rising living expenses.

In addition to what is shown on Table 5, casinos used revenues to pay for charitable donations, plan new projects, pay back debts, and make new investments.



Tribal casino employees earned over \$319.1 million in wages, tips, and benefits working in Oregon during 2023. The largest benefit cost was \$41.9 million for the healthcare of 4,439 workers. Table 6 shows the breakdown of labor expenditures. The average total compensation per employee in 2023 was \$71,887. Of that, \$49,466 came as wages, salaries, and tips while \$22,421 were employer-paid benefits. The average employee paid over \$12,200 in FICA and income taxes. Average employee compensation costs have risen sharply since 2020, with a 34 percent increase between 2020 and 2023, driven by inflation and tightness in labor markets, especially in certain rural areas. Some casinos are testing ways to address high labor costs by using VLT versions of table games and changing their mixes of food and beverage services.

**Table 6: Oregon Tribal Casino Labor Costs, 2020 - 2023**

<b>Labor Statistics</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>Casino Labor Costs</b>				
Wages, salaries, and tips	\$151,773,671	\$189,338,449	\$201,056,919	\$219,581,194
Employer-paid payroll taxes	13,521,851	17,653,735	19,033,639	20,919,900
Healthcare benefits	33,943,942	34,743,990	36,783,967	41,910,057
Retirement, benefits & compensation	24,614,466	26,030,326	31,907,022	36,697,214
Total employer paid compensation	\$223,853,930	\$267,766,499	\$288,781,548	\$319,108,366
Average number of employees	4,174	4,220	4,282	4,439
<b>Per Employee</b>				
Total compensation paid by casinos	\$53,631	\$63,452	\$67,441	\$71,887
Wages, salaries, and tips	36,362	44,867	46,954	49,466
Benefits & taxes paid by casinos	17,269	18,585	20,487	22,421
Employee-paid income & other taxes	8,030	9,909	11,537	12,247

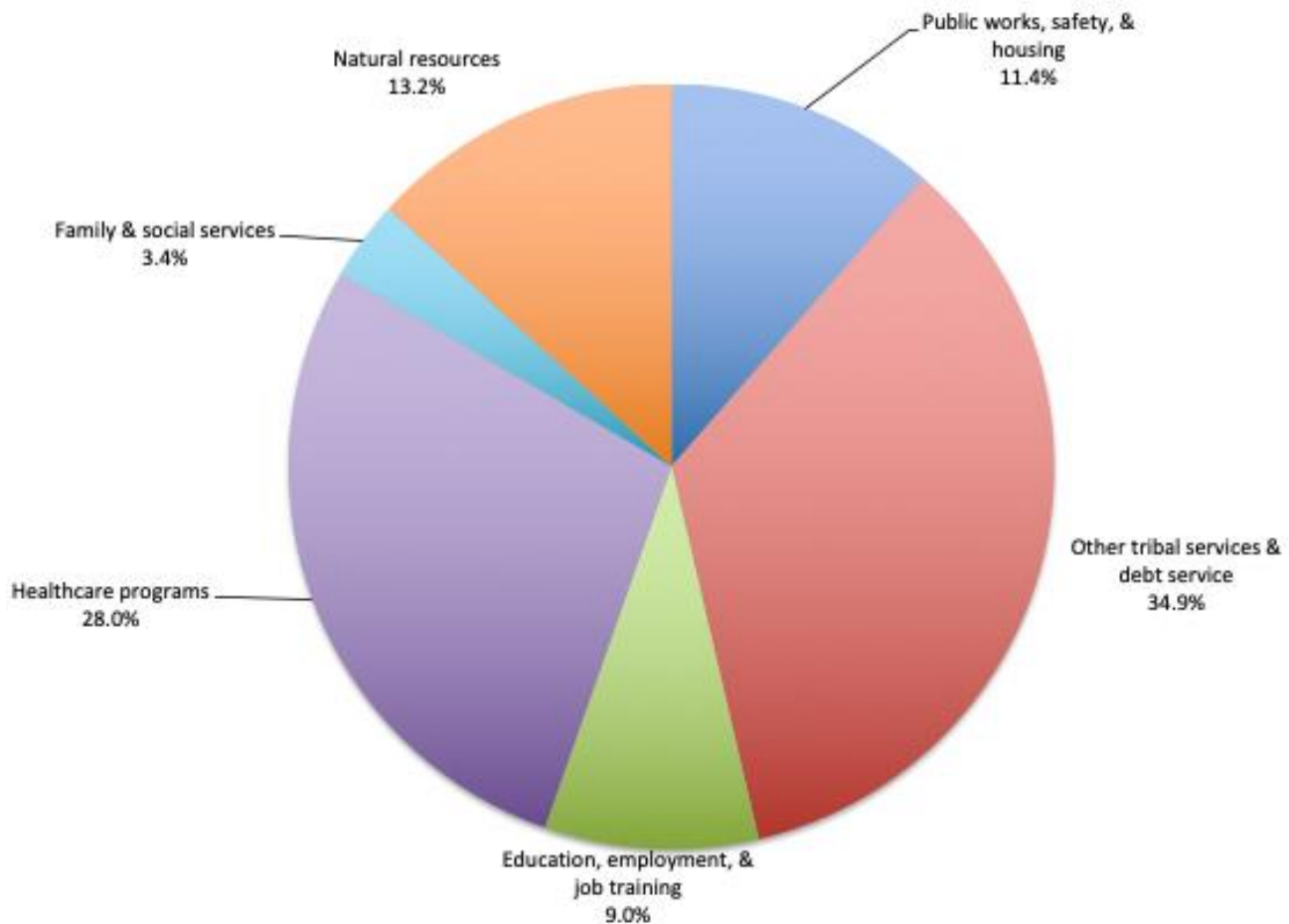
Source: Tribal reports and estimates by ECONorthwest.

## Tribal Government Support

Out of the \$201.6 million in 2023 tribal gaming businesses gave back to their Tribes, \$131.1 million went directly to pay for tribal government programs. In 2023, about one-third of the tribal government support coming from gaming went towards debt service and general tribal services, 28 percent to healthcare, 13 percent to managing natural resources, 11 percent for public works, safety, and housing, 9 percent to education and job programs, and 3 percent to family and social services. The shares of tribal needs aided by funds earned by casinos and resorts are shown in Figure 3.



**Figure 3: 2024 Where Gaming Dollars Went (excluding direct payments to members)**



## Results of the Impact Analysis

Table 7 summarizes the impacts tribal gaming had on Oregon's economy from 2020 through 2023. The table shows the direct impacts, which are those occurring at the casinos and the portion of impacts by tribal governments that are financially supported by gaming. The casinos and the portion of tribal government paid with money earned by casinos ripples throughout the state economy as businesses and households spend and re-spend money. The results are the indirect and induced impacts. Those impacts affect every facet of the economy and all industry sectors including state and local government. The sum of the direct, indirect, and induced impacts is the total impact on Oregon's economy.

**Table 7: Impacts of Tribal Gaming on Oregon, Millions \$, 2020-2023**

Economic Activity	2020			2021			2022			2023		
	Output	Labor Income & Benefits	Jobs	Output	Labor Income & Benefits	Jobs	Output	Labor Income & Benefits	Jobs	Output	Labor Income & Benefits	Jobs
<b>Direct Impacts</b>												
Gaming & hospitality	\$546.2	\$223.9	4,174	\$769.2	\$267.8	4,220	\$725.6	\$288.8	4,282	\$738.0	\$319.1	4,439
Tribal needs supported by casinos	\$116.6	\$48.7	617	\$119.7	\$48.2	607	\$112.0	\$52.4	616	131.1	59.7	662
<b>Direct Impacts</b>	<b>\$662.7</b>	<b>\$272.6</b>	<b>4,791</b>	<b>\$888.9</b>	<b>\$316.0</b>	<b>4,827</b>	<b>\$837.5</b>	<b>\$341.1</b>	<b>4,898</b>	<b>\$869.1</b>	<b>\$378.9</b>	<b>5,101</b>
<b>Indirect &amp; Induced Impacts</b>												
Resources, utilities & construction	\$97.7	\$43.8	773	\$79.4	\$33.0	524	\$93.8	\$40.3	652	\$95.1	\$39.6	640
Manufacturing	28.6	5.1	79	35.8	6.1	98	38.5	6.2	94	43.7	7.3	111
Wholesale & retail trade	94.9	35.1	594	129.9	44.2	725	137.6	42.6	701	147.9	45.9	754
Services, real estate, finance	334.3	126.7	1,902	424.3	158.2	2,242	431.9	159.8	2,280	489.4	178.7	2,545
Restaurants, bars, hotels	25.9	11.4	324	42.5	16.9	454	50.0	20.8	514	50.5	20.7	515
Government & education	85.9	62.8	676	97.7	70.7	728	90.2	63.8	640	104.4	74.7	747
All other Industries*	61.0	20.1	289	86.2	24.8	379	76.1	23.2	383	97.6	27.6	442
<b>Indirect &amp; Induced Impacts</b>	<b>\$728.3</b>	<b>\$304.9</b>	<b>4,637</b>	<b>\$895.9</b>	<b>\$353.9</b>	<b>5,150</b>	<b>\$918.2</b>	<b>\$356.7</b>	<b>5,264</b>	<b>\$1,028.5</b>	<b>\$394.6</b>	<b>5,754</b>
<b>Total Impacts</b>	<b>\$1,391.1</b>	<b>\$577.5</b>	<b>9,427</b>	<b>\$1,784.8</b>	<b>\$669.9</b>	<b>9,977</b>	<b>\$1,755.7</b>	<b>\$697.8</b>	<b>10,162</b>	<b>\$1,897.7</b>	<b>\$773.4</b>	<b>10,855</b>

Source: IMPLAN analysis of tribal data by ECONorthwest.

\* transportation, information, utilities, healthcare, entertainment, charities, etc.

In 2020, Tribal gaming and the Tribal government services gaming supported directly generated \$662.7 million in economic output, employed 4,791 workers, and paid \$272.6 million in wages and benefited. With the recovery from COVID and statewide economic growth that followed, in 2023, tribal gaming directly contributed \$869.1 million in economic output, employed 5,101 workers, and paid \$378.9 million in labor income and benefited to Oregon. This economic activity stimulated jobs and output elsewhere in the state. These direct impacts rippled through the entire state economy by increasing employment and sales resulting in the contribution of nearly \$1.9 billion in economic output, supporting 10,855 jobs, and contributing \$773.4 million to worker earnings and benefits.





## Multipliers

Tribal spending has a multiplicative effect on the state's economy. This means spending from tribal gaming multiplies as it circulates throughout the economy *via* individuals and businesses. This effect describes the linkages between tribal activities and the Oregon economy—the greater the linkages, the larger the multiplier.

For this analysis, the multipliers are calculated as the ratio of total impacts to the initial direct impacts at the gaming and hospitality businesses of Tribes. The 2023 multipliers for tribal gaming operations in Oregon were:

- ◆ **Output multiplier: 2.2**
- ◆ Every \$1 million in direct output from Tribal gaming stimulated another \$1.2 million in output in other Oregon industries in 2023 for a total of \$2.2 million.
- ◆ **Labor income & benefits multiplier: 2.0**
- ◆ Every \$1 million in wages and benefits paid to tribal gaming employees corresponds to another \$1 million earned by other workers in Oregon for a total of \$2.0 million.
- ◆ **Job multiplier: 2.1**
- ◆ For every ten jobs at a tribal casino and resort in 2023, including tribal government jobs supported by gaming, another 11 jobs were supported in Oregon for a total of 21.

## Fiscal Impacts in 2023

Tribal economies consist of private businesses and government enterprises. Casinos are one such government enterprise, analogous to the Oregon Lottery's relationship to state government. United States Indian Tribes are self-governing, and tribal casinos, like state lotteries, are not subject to income or property taxes. However, their cash flows support government services and public needs. Additionally, many tribal governments pay state and local jurisdictions for services.

Oregon Tribes also contributes to the fiscal wellbeing of state and local governments through the income taxes paid by casino and tribal government employees, tribal members, and the workers and businesses who indirectly benefit from gaming.

In 2023, the economic activity from tribal gaming generated approximately \$35 million in state income taxes. Tribal gaming also was directly and indirectly responsible for \$19.6 million in other Oregon taxes, licenses, and fees (including those for Oregon State Police gaming regulation). In total, \$54.6 million in revenues to the government of the State of Oregon resulted from tribal gaming.



**Table 8: Tax and Other Government Revenues Associated with Oregon Tribal Gaming, 2020 – 2023, Millions \$**

<b>Jurisdiction/Source</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<u>State of Oregon</u>				
State personal & corporate income tax	\$20.4	\$29.5	\$30.8	\$35.0
Other state taxes, fees & licenses	\$11.2	\$17.0	\$18.1	\$19.6
<b>Total State Revenues</b>	<b>\$31.6</b>	<b>\$46.5</b>	<b>\$48.9</b>	<b>\$54.6</b>
<u>Local Governments in Oregon</u>				
Local property taxes	\$13.5	\$14.9	\$16.1	\$18.1
Other local taxes, fees & licenses	\$1.5	\$1.7	\$1.9	\$2.2
<b>Total Local Revenues</b>	<b>\$15.0</b>	<b>\$16.6</b>	<b>\$18.0</b>	<b>\$20.3</b>
<u>U.S. Federal Government</u>				
Federal personal & corporate income tax	\$40.9	\$59.0	\$61.6	\$70.0
Excise, Social Security, & other taxes	\$53.2	\$76.7	\$80.1	\$90.9
<b>Total Federal Revenues</b>	<b>\$94.1</b>	<b>\$135.7</b>	<b>\$141.7</b>	<b>\$160.9</b>
<b>Total Government Payments &amp; Taxes</b>	<b>\$140.8</b>	<b>\$198.8</b>	<b>\$208.7</b>	<b>\$235.8</b>

As with the Oregon Lottery, Tribal casinos are the enterprises of federally recognized Indian tribes and do not pay local property taxes yet the net revenues from these gaming enterprises are remitted to their respective governments. However, tribal gaming in Oregon does contribute indirectly to state, local, and federal governments through payroll taxes on tribal employees, the earnings and spending of those employees, and through the many businesses whose sales and employment are tied to supplying goods and services.

Collectively, the taxes are substantial and in 2023, the state of Oregon received over \$54.6 million in revenues due to tribal gaming, and local governments in Oregon received \$20.3 million in revenue. The greatest tax impact is federal. Almost all the businesses supplying casinos and tribal governments pay federal taxes and all employees pay income, Social Security, and Medicare taxes. Tribes also pay for federal gaming regulation. When all the direct, indirect, and induced federal tax and related revenues are summed, the result shows over \$160.9 million in federal government revenues in 2023 were attributable to tribal casinos in Oregon.

While tribal government and businesses are not subject to local property taxes, their employees and suppliers are. So too are others in the economy whose incomes trace back to tribal gaming. The income and employment effects filter into the markets for housing, and this generates property taxes. Businesses serving Tribes and casino also pay state and local taxes.

In total, the fiscal impact of tribal gaming across all local, state, and federal governments, except for Tribes themselves, was \$235.8 million.



On top of tax impacts, Oregon Tribes also provides some government services for the benefit of non-tribal communities. For example, six of the federally recognized Tribes use gaming revenues to support tribal police departments having the same authority to enforce federal, state, and local law as city, county, and state law enforcement officers. Tribal police, like police employed by any other sovereign, focus on protection of respective tribe's property and members. Members of the larger communities where tribal members live and where tribal property is situated benefit from having this law enforcement. The value of this is not quantified for purposes of this edition of this report but is nonetheless material.

Moreover, tribal police departments in Oregon are headquartered in rural Oregon where non-tribal public resources have been stretched thin. Currently, no state or local funds support tribal police operations.

## Trends

Oregon tribal gaming revenues rose every year from the industry's inception in 1992 through 2007, then fell when a severe recession hit. Gaming bottomed out in 2011 and slowly recovered. In 2020, gaming fell dramatically due to COVID restrictions and temporary casino closures. Gaming has recovered to some degree since then but is being threatened by new tribal casinos in bordering states. In Washington some tribes can have more than one casino, and they need not be on tribal land.

## Visitation and Operations

Table 9 summarizes visitation and operating statistics for the last ten years. Casino visits counts peaked in 2015 and declined since, with a drastic decline in 2020 due to COVID. All casino closed for part of 2020 and reopened slowly. Visits rebounded in 2021 but have since declined. Overnight hotel stays rose between 2014 and 2023, with a peak of 443,807 room nights in 2023. Hotel guests are important to Tribes because they stay longer and spend more money than the average casino visitor does. And hotels are important for state tourism as they cater to out-of-state visitors.



**Table 9: Tribal Gaming Visits, Revenues, and Expenditures, 2014-2023**

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
<b>Visitation</b>										
Casino	7,206,260	7,456,610	7,318,084	6,896,843	7,253,300	6,614,500	3,347,693	5,327,549	4,909,032	4,872,779
Hotel room nights	419,160	425,695	431,592	427,746	423,547	442,637	280,361	412,387	443,807	442,022
<b>Revenues (thou. \$)</b>										
Gaming	\$476,532	\$499,586	\$515,632	\$499,309	\$528,661	\$537,726	\$493,880	\$705,962	\$648,950	\$660,224
Food & beverage	68,224	72,348	74,662	74,672	77,330	77,734	42,053	63,708	69,621	78,576
Hotel & lodging	34,886	37,192	41,935	44,046	41,886	44,467	29,194	44,327	48,672	51,350
Other	17,849	18,716	23,848	23,649	22,303	23,889	30,544	31,038	33,858	35,571
Less complementaries	(30,459)	(34,407)	(36,897)	(39,307)	(41,880)	(41,895)	(49,494)	(75,809)	(75,527)	(87,716)
Total Net Revenue	\$567,033	\$593,435	\$619,180	\$602,370	\$628,299	\$641,921	\$546,177	\$769,226	\$725,573	\$738,004
	\$177,201	\$185,979	\$190,389	\$158,285	\$159,455	\$152,219	\$141,561	\$263,379	\$165,384	\$129,559
<b>Major Expenditures (thou. \$)</b>	31%	31%	31%	26%	25%	24%	26%	34%	23%	18%
Labor	\$201,627	\$204,169	\$209,112	\$238,332	\$229,589	\$238,332	\$223,854	\$267,766	\$288,782	\$319,108
Operating & regulatory	170,647	167,749	184,878	182,643	200,335	192,012	134,538	203,169	224,497	246,491
Capital expenditures	17,558	35,538	34,801	23,110	38,919	59,357	46,224	34,911	46,910	42,846
<b>To Tribal Govt. (thou. \$)</b>	\$142,905	\$150,833	\$155,613	\$131,488	\$161,073	\$182,930	\$170,583	\$216,376	\$185,493	\$201,648

As shown on Table 10, tribal casino hotels sold 82.8 percent of their available room nights in 2023, well above the statewide average of 59.7 percent.<sup>12</sup> The average casino visitor, both those staying in the hotels and those that did not, spent \$135.49 each per visit on gaming, \$16.13 on eating and drinking, \$10.54 on lodging, and \$7.30 on other goods and services. They also received \$18.00 in complementary items, which are discounts offered to frequent customers. Post COVID there was a major change in the proportion of casino visitors whose primary purpose of visiting was to gamble. Fewer casual and non—gaming visitors are coming to casinos now. The result is a large increase in gaming expenditures per visit. This change is observed in other markets including Las Vegas where per visitor spending on gaming jumped from \$527 per trip to \$788 between 2018 and 2023.

**Table 10: Hotel Operations and Casino Visitor Spending, 2014 - 2023**

Measure	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
<b>Hotel:</b>										
Est. occupancy rate	82.4%	83.7%	85.0%	84.5%	78.9%	85.8%	52.5%	80.5%	84.5%	82.8%
Average daily rate	\$83.23	\$87.37	\$97.16	\$102.97	\$95.82	\$97.23	\$98.74	\$101.07	\$102.74	\$108.21
% of all visitors from hotel	8.1%	8.0%	8.3%	8.7%	8.2%	9.4%	11.7%	10.8%	12.7%	12.7%
<b>Per Casino Visitor:</b>										
Gaming	\$66.13	\$67.00	\$70.46	\$72.40	\$72.89	\$81.29	\$147.53	\$132.51	\$132.20	\$135.49
Food & Beverage	9.47	9.70	10.20	10.83	10.66	11.75	12.56	11.96	14.18	16.13
All Lodging & RVs	5.02	5.19	5.95	6.39	5.77	6.72	8.72	8.32	9.91	10.54
Other	2.29	2.31	3.03	3.43	3.07	3.61	9.12	5.83	6.90	7.30
Complementaries	(4.23)	(4.61)	(5.04)	(5.70)	(5.77)	(6.33)	(14.78)	(14.23)	(15.39)	(18.00)
<b>Net spending</b>	\$78.69	\$79.59	\$84.61	\$87.34	\$86.62	\$97.05	\$163.15	\$144.39	\$147.80	\$151.45

<sup>12</sup> <https://www.travelstats.com/dashboard/oregon>



## Economic Impact Trends

Table 11 shows that every year since 2003, over 10,000 jobs in Oregon were associated with tribal gaming except in 2020 and 2021 due to COVID. Direct employment at tribal gaming businesses and the Tribal government jobs gaming support were adversely affected by COVID, but since recovered. Since 2003, Tribal gaming directly supported over \$5.4 billion in wages and benefits and, through its contributions to the whole state economy, nearly \$11.5 billion in wages and benefits.

**Table 11: Economic Impacts of Tribal Gaming, 2003-2023**

Year	Direct Impacts			Total Impacts		
	Output	Labor Income & Benefits	Jobs	Output	Labor Income & Benefits	Jobs
2003	\$563.7	\$192.4	5,328	\$1,026.9	\$348.9	10,968
2004	619.3	215.8	5,699	1,326.9	470.5	14,534
2005	674.8	227.0	5,939	1,474.7	509.4	15,221
2006	703.6	239.0	6,094	1,420.2	476.4	13,916
2007	760.9	253.5	6,516	1,589.3	531.8	15,438
2008	737.5	256.9	6,551	1,640.6	553.6	15,483
2009	711.9	251.5	6,021	1,516.9	514.0	14,415
2010	722.5	244.6	5,715	1,459.9	498.0	12,763
2011	703.3	236.0	5,642	1,506.1	506.9	13,153
2012	712.3	245.0	5,625	1,491.6	531.8	12,779
2013	706.4	237.1	5,490	1,397.8	479.6	11,510
2014	776.6	252.8	5,244	1,591.8	581.5	11,843
2015	740.7	249.2	5,129	1,501.0	549.6	11,231
2016	774.8	251.4	5,313	1,590.0	580.1	11,912
2017	733.9	250.2	5,160	1,494.2	550.6	11,262
2018	789.4	267.6	5,126	1,490.4	505.1	10,203
2019	824.9	282.3	5,206	1,609.8	556.0	10,873
2020	662.7	272.6	4,791	1,391.1	577.5	9,427
2021	888.9	316.0	4,827	1,784.8	669.9	9,977
2022	837.5	341.1	4,898	1,755.7	697.8	10,162
2023	869.1	378.9	5,101	1,897.7	773.4	10,855



## Tribal Government Support Trend

Oregon's Tribes continue to improve local communities through economic development. Their investments in social programs and infrastructure will serve to benefit tribal members, employees, and their families for years to come. However, this spending relies on the continued success of tribal gaming.

Most of the revenue made by casinos pays for wages and other operating expenses. After covering debt service, charitable contributions, savings, and capital costs, almost all of what remains goes to the Tribes.

Table 12 shows the yearly and cumulative gaming revenues transferred to Tribes. They totaled almost \$3.5 billion since 2003. Much of this went towards tribal purposes, including the construction of community centers, health clinics, and housing, paying for healthcare, managing resources, and administering the day-to-day affairs of tribal governments. Tribes have also used their resources to help diversify their economies so to reduce their reliance on gaming.



**Table 12: Tribal Gaming Revenues Used to Support Tribal Government and Tribal Members, 2003-2023**

<b>Year</b>	<b>Annual Support</b>
2003	\$141,665,000
2004	168,826,000
2005	179,992,000
2006	202,004,000
2007	176,442,000
2008	173,444,000
2009	157,121,000
2010	148,208,000
2011	142,137,000
2012	146,768,000
2013	136,154,000
2014	142,905,000
2015	150,833,000
2016	155,613,000
2017	131,488,000
2018	161,072,533
2019	182,930,227
2020	170,583,388
2021	216,375,729
2022	185,492,983
2023	201,647,902
<b>Total</b>	<b>\$3,471,702,761</b>

## **Trend in Fiscal Impacts**

As shown in Table 13, the economic footprint of tribal gaming in Oregon has benefited local, state, and federal governments. Since 2003, tribal gaming indirectly generated over \$749.3 million to Oregon state revenues, \$398 million to local governments, and over \$1.9 billion in federal taxes. The total tax impact of Oregon's tribal casinos from 2003 to 2023 exceeded \$3 billion. The fiscal contributions have trended up since 2003, as tribal gaming has continued to thrive and evolve.





**Table 13: Government Revenues Traced to Tribal Gaming in Oregon, 2003-2023**

<b>Year</b>	<b>State Government</b>	<b>Local Governments</b>	<b>Federal Government</b>	<b>All Taxes &amp; Payments</b>
2003	\$25,611,700	\$17,013,900	\$58,289,400	\$100,915,000
2004	34,487,100	19,293,900	68,693,700	122,474,700
2005	41,155,000	22,036,900	77,072,700	140,264,600
2006	38,831,700	17,970,700	73,379,400	130,181,800
2007	38,409,000	21,755,200	74,160,000	134,324,200
2008	37,937,400	24,361,700	77,665,800	139,964,900
2009	32,473,900	21,149,700	72,510,900	126,134,500
2010	31,148,000	21,977,000	79,345,000	132,470,000
2011	36,076,000	23,303,000	81,588,000	140,967,000
2012	35,965,000	21,511,000	92,174,000	149,650,000
2013	32,535,000	16,850,000	83,070,000	132,455,000
2014	28,614,232	15,320,212	85,855,078	129,789,521
2015	30,824,079	16,986,936	91,443,700	139,254,715
2016	29,473,314	21,361,541	94,131,591	144,966,446
2017	27,681,647	17,742,714	88,939,402	134,363,763
2018	31,569,894	14,043,488	106,238,008	151,851,390
2019	34,935,552	16,367,226	108,546,158	159,848,936
2020	31,644,477	15,032,135	94,097,136	140,773,748
2021	46,497,904	16,597,102	135,711,742	198,806,748
2022	48,906,125	18,011,594	141,742,025	208,659,743
2023	54,553,290	20,297,376	160,918,231	235,768,897
<b>Total</b>	<b>\$749,330,312</b>	<b>\$398,983,324</b>	<b>\$1,945,571,970</b>	<b>\$3,093,885,606</b>

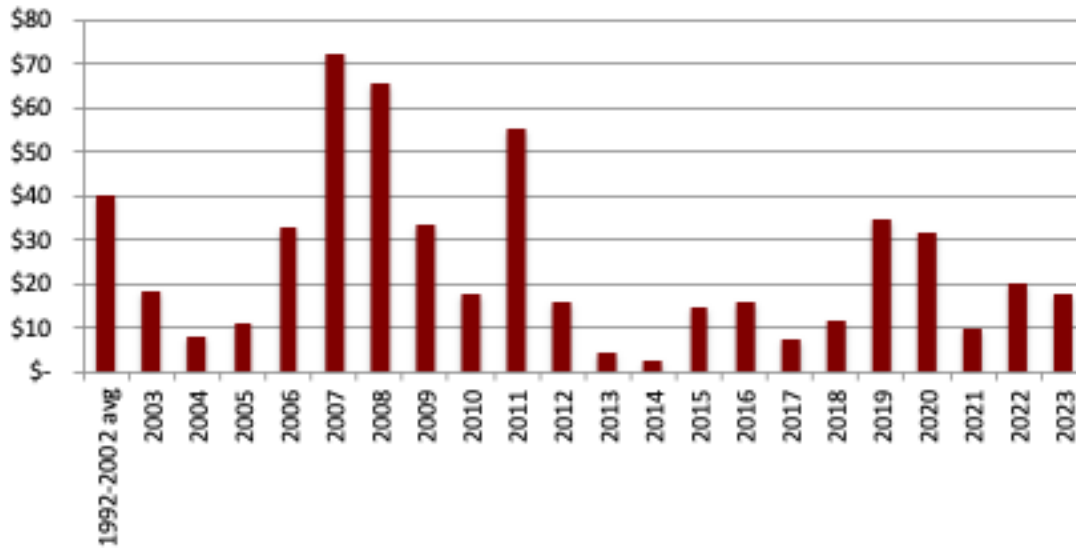
## Construction Spending

Since 1992, Oregon Tribes spent over \$940 million on construction of casinos, hotels, and other resort amenities. With some casino resorts entering their third decade, spending on construction has crept up in recent years. Tribes accounted for 14.2 percent of all the construction spending in Oregon on hotel, entertainment, and recreation buildings since 1992. All the construction has occurred in either rural areas or communities that were struggling economically in the 1990s.





**Figure 4: Annual Tribal Casino Construction Spending, Millions \$**



## Charitable Grants & Donations

Six Tribes contributed to foundations, which make grants to charitable organizations throughout most of Oregon. The foundations are charitable contribution or community benefit funds as defined by the compacts negotiated between each tribe and the Governor of Oregon. The six casinos operating under compacts calling for these funds have a wider range of table games (such as craps and roulette). The foundations granted \$11.6 million in 2023 and \$196.3 million since their inception.

All casinos directly donated to local charities and they gave \$976,679 in 2023. Since the first casino opened, donations have totaled \$13.7 million. Including foundation grants, charities in Oregon received \$210 million from tribal casinos since 1992.

**Table 14: Charitable Grants and Donations by Tribal Casinos Since 1992**

Charitable Grants & Donations	2020	2021	2022	2023	Since 1992
Grants by tribal foundations	\$8,245,006	\$8,911,168	\$14,792,020	\$11,568,914	\$196,285,870
Direct donations to charities	504,755	510,457	782,186	976,679	13,690,418
Total grants and donations	\$8,749,761	\$9,421,626	\$15,574,206	\$12,545,593	\$209,976,288



### 3. Gaming Market in 2023

Gaming revenue is approximately the difference between how much people wager and what they win. We measure gaming revenues in two ways:

- ♦ The first is by how much gaming is being conducted in the state. This way captures spending by tourists in Oregon and tells us how large the overall gaming industry is in the state. It is a useful measure of the size of the local industry and the share of the market held by different entities, such as the Oregon Lottery and tribal casinos.
- ♦ The second way counts how much gaming Oregonians do regardless of whether it is within the borders of the state or not. This method shows you how much gaming was demanded by Oregon residents and is useful for understanding how spending on gaming relates to how much money Oregonians make.

ECONorthwest uses data from several sources to calculate the total amount spent on gaming in Oregon and out of state. ECONorthwest also uses cell phone data from Placer.ai to estimate spending by out-of-state guests visiting Oregon casinos.

#### Gaming Revenues

In 2023, gaming within the State of Oregon totaled almost \$2.2 billion. Tourists accounted for 7.9% of the gaming done in Oregon. Meanwhile, Oregonians spent 18.7% of their nearly \$2.5 billion in gaming dollars outside of Oregon.

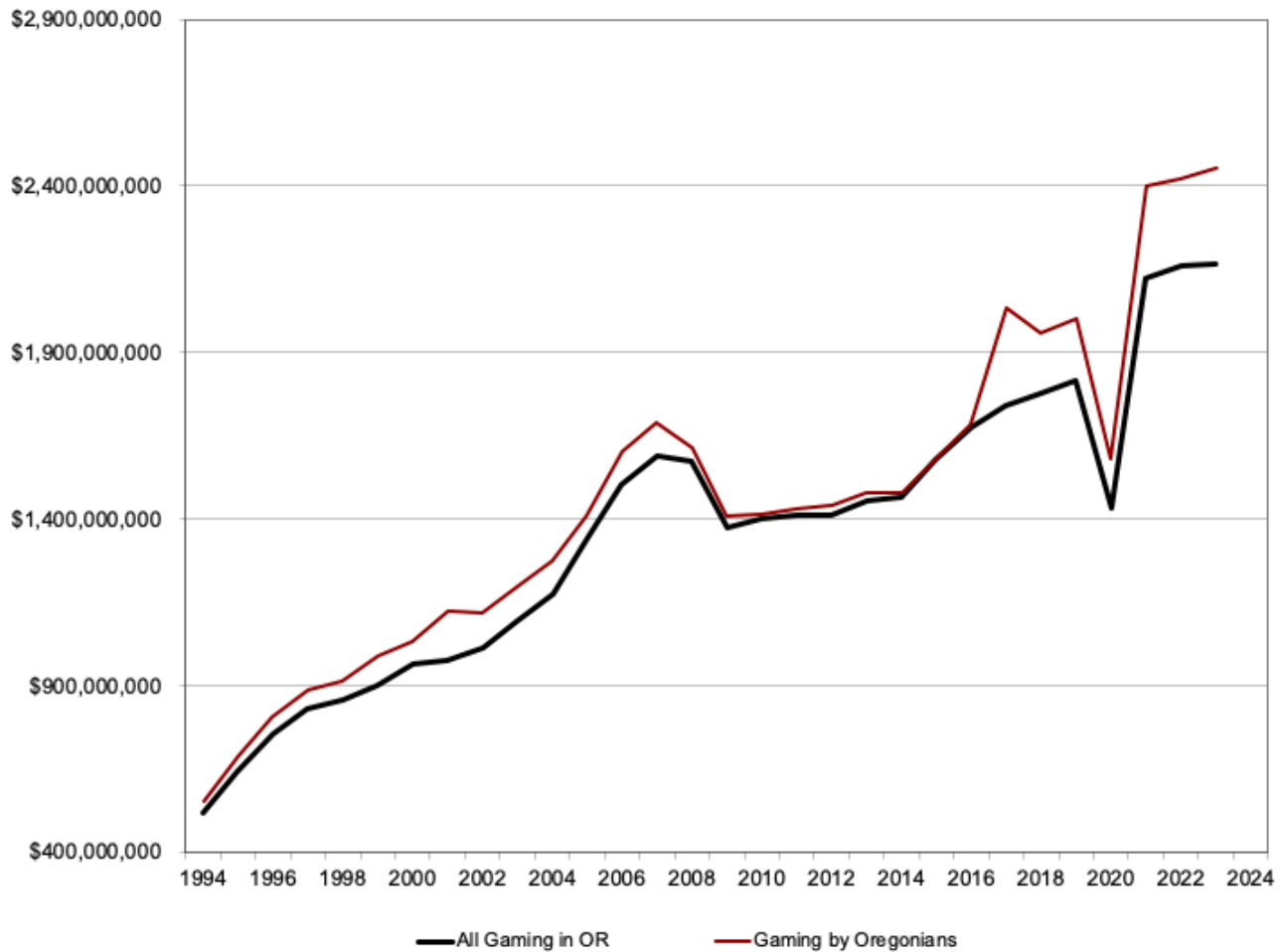
**Table 15: Gaming by place and residency, 2023**

<b>Gaming in Oregon and Gaming by Oregonians in and Out of the State</b>	<b>Revenues in 2023</b>	<b>% of Total</b>
<u>Gaming in Oregon:</u>		
By Oregon Residents	\$1,994,616,705	92.1%
By visitors to Oregon	172,244,038	7.9%
Total Gaming Inside Oregon	\$2,166,860,743	100.0%
<u>Gaming by Oregonians:</u>		
Done in Oregon	\$1,994,616,705	81.3%
At places out-of-state	459,647,475	18.7%
Total Gaming by Oregonians	\$2,454,264,180	100.0%

Since 1994, gaming in Oregon has been growing at an annual pace of about 3.8 percent, which is above the annual inflation rate since then of 2.3 percent. There was a protracted pause in growth after the 2007 housing financial crisis, but growth since resumed.



**Figure 5: Gaming in Oregon and by Oregonians, 1994-2023**



The greatest competitor to Oregon tribal casinos is the Oregon Lottery. The Lottery holds a broad geographic monopoly; an ability to locate VLTs in bars throughout Oregon and to offer sports betting on cell phones almost anywhere in the state. The combination of the Lottery and out-of-state casinos has taken a toll on Oregon Tribes. Figure 6 illustrates this. Tribal gaming revenues grew only 30 percent since 2007; not keeping up with general inflation, which was 47 percent.

**Figure 6: Oregon Tribal Casino Gaming Revenues, 1994-2023**

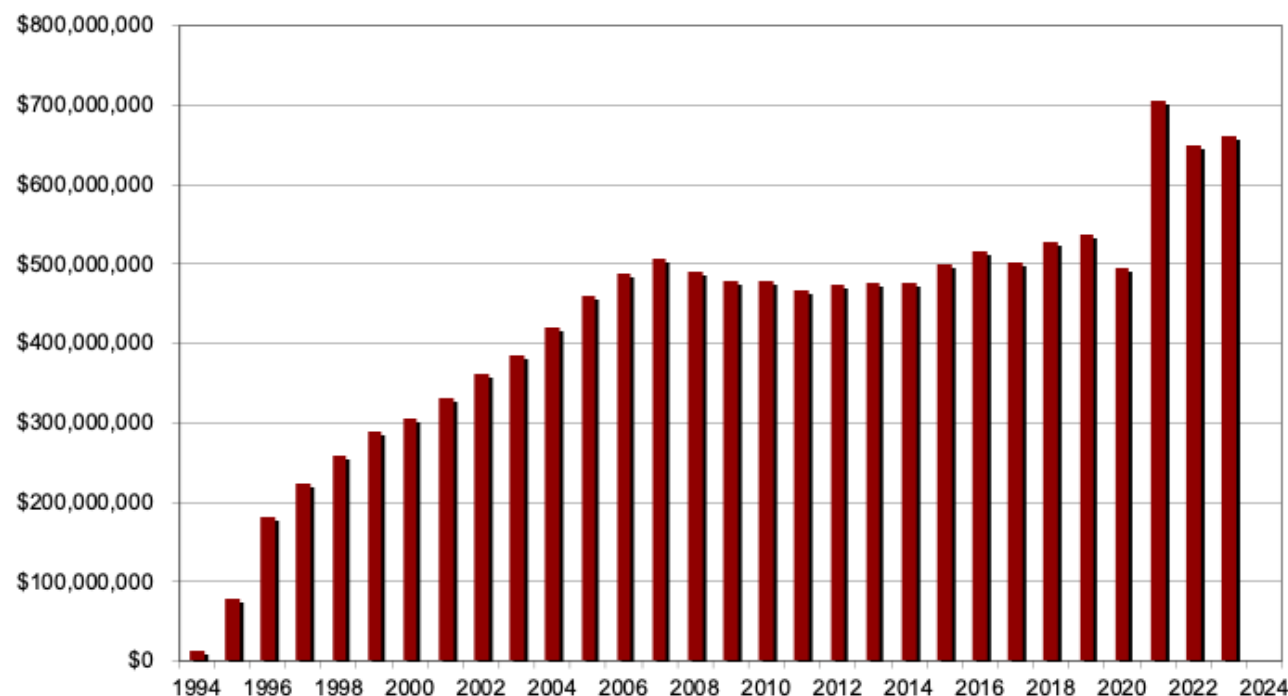


Table 16 is a list of the different forms of gaming and their revenues in 2023. The average Oregon resident spent \$579.74 on gaming, totaling 0.89 percent of their personal income. In 2023, an estimated \$2.17 billion was spent on gaming inside the state of Oregon.



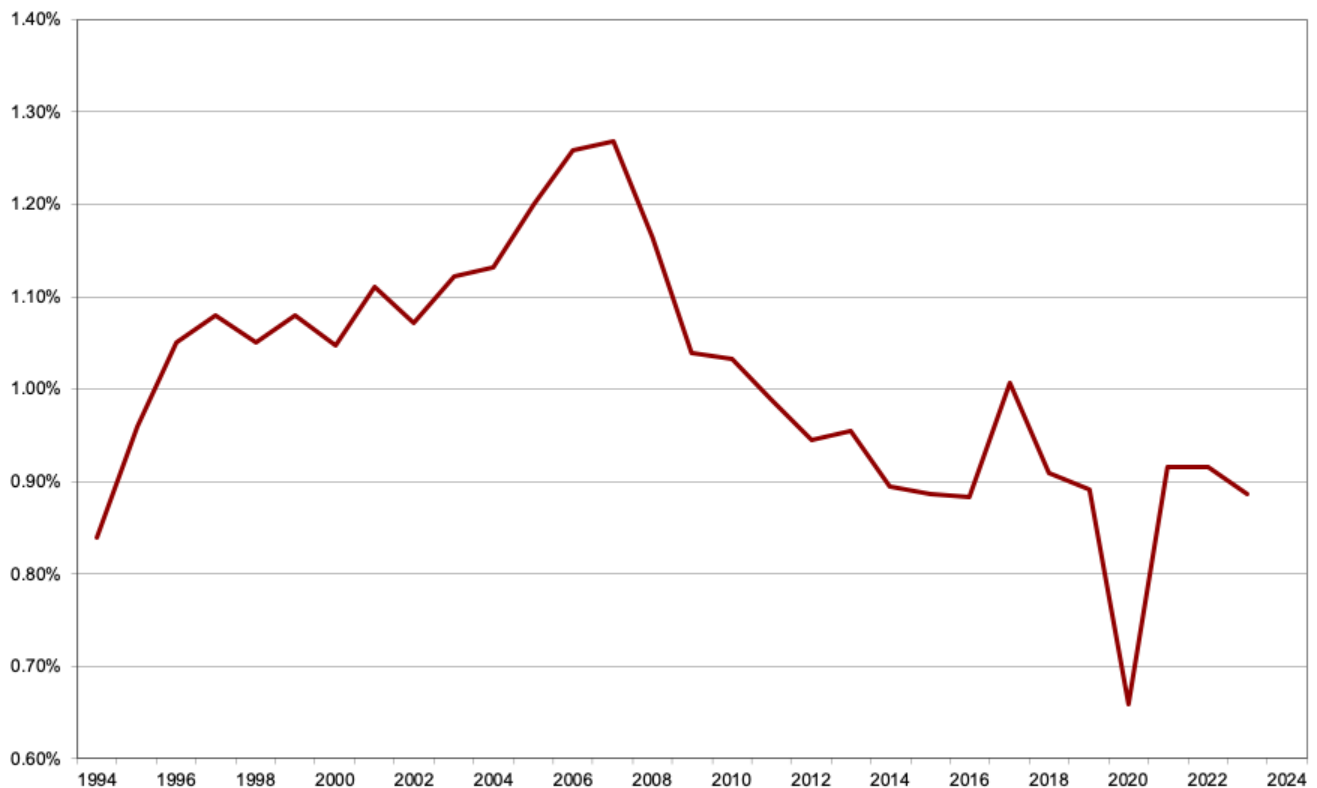
**Table 16: Gaming in Oregon, 2023**

<b>Type of Gaming</b>	<b>Gaming Revenues in 2023</b>	
	<b>Conducted in Oregon</b>	<b>Done by Oregonians</b>
Charitable bingo	\$6,249,418	\$6,234,547
Charitable raffles	6,888,487	6,440,735
Charity Monte Carlo casino nights	124,153	121,670
OR Lottery Scratch-its <sup>SM</sup> Instant Tickets	48,897,716	48,429,765
OR Lottery Megabucks <sup>SM</sup>	17,510,341	17,375,102
OR Lottery Powerball®	46,600,360	46,581,719
OR Lottery keno	32,928,905	32,483,831
OR Lottery Raffle <sup>SM</sup>	1,199,880	1,179,246
OR Lottery Pick 4 <sup>SM</sup>	839,824	832,325
OR Lottery Win For Life <sup>SM</sup>	1,076,603	1,068,715
OR Lottery Mega Millions®	8,853,927	8,850,386
OR Lottery Lucky Lines <sup>SM</sup>	563,542	559,571
OR Lottery sports wagering	64,321,323	61,877,113
OR Lottery video games	1,177,242,980	1,148,400,527
Oregon Indian casinos	660,223,923	520,856,160
Parimutual betting on OR races	216,176	202,110
Gambling outside Oregon	-	459,647,475
Illegal Internet & other illegal	93,123,183	93,123,183
<b>TOTAL</b>	<b>\$2,166,860,743</b>	<b>\$2,454,264,180</b>
Change from 2022	0.20%	1.39%
Population July 1, 2023		4,233,358
Increase from 2022		-0.16%
Gaming per person		\$579.74
Personal Income (BEA) 2023		\$276,972,800,000
Increase from 2022		4.84%
Gaming share of income		0.89%

Changes in the share of income going towards gaming are illustrated in Figure 7. The large rebound in gaming expenditures seen in 2021 by Oregonians was due to a surge in their personal incomes. Per capita income rose nearly \$10,000 between 2019 and 2021 because employment rebounded quickly and people received COVID relief benefit checks from the federal government. Still, in 2021 people kept their gaming spending in proportion with their incomes, and about 0.9% of income was spent on gaming. It has remained near that level since 2021.



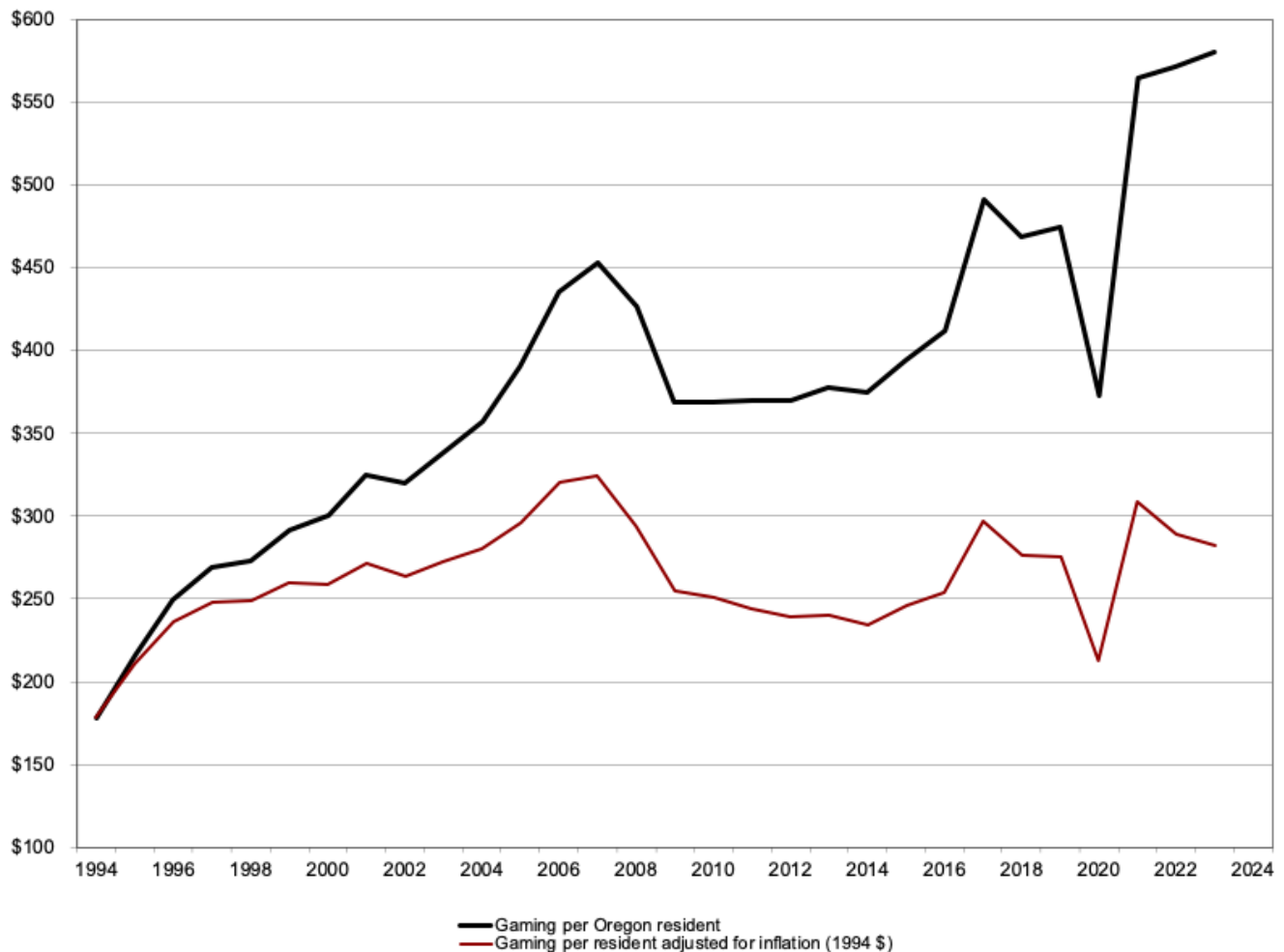
**Figure 7: Share of Oregonians' Personal Incomes Spent on All Types of Gaming, 1994-2023**



The average Oregonian spent almost \$580 on gaming in 2023, which was a record high. However, when adjusting for inflation, the spending per person was roughly the same as it was in 2004, as shown in Figure 8.



**Figure 8: Oregon Resident per Capita Gaming, 1994-2023**



## Market Share Analysis

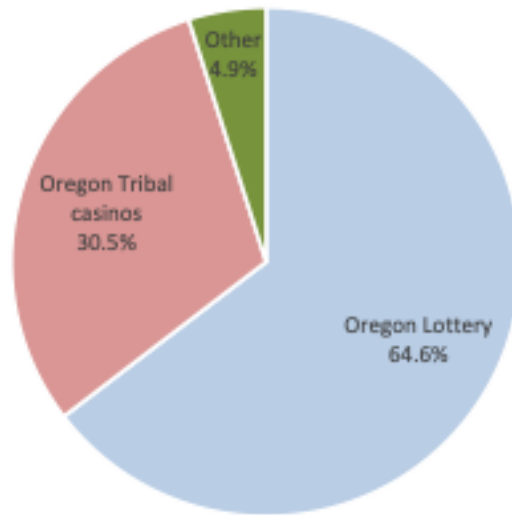
Before 1985, legal gambling in Oregon was limited to horse and greyhound racing. On April 25, 1985, the Oregon Lottery started selling scratch-off lottery tickets. In November that year, they added lotto games (Megabucks). Then in 1992, they introduced video poker on the premise that there were ten thousand gray market slot machines in bars and clubs throughout the state.

Bettors flocked to play the Lottery's video poker machines. Within two years, the Oregon Lottery held an 81 percent market share just as tribal casinos came on the scene. Attendance at racetracks declined dramatically. Most racetracks closed. Gambling at charity bingo halls also declined and many of them closed as well.

The Oregon Lottery continues to have a dominant share of the market; in 2023, the Oregon Lottery held a 64.6 percent share of all the gaming done in the state. Oregon tribal casinos accounted for 30.5 percent. Other gaming (4.9 percent) includes charitable bingo, raffles, and Monte Carlo casino gaming plus horse racing and online betting on greyhound races,



**Figure 9: Market Share Breakdown of Gaming in Oregon, 2023**



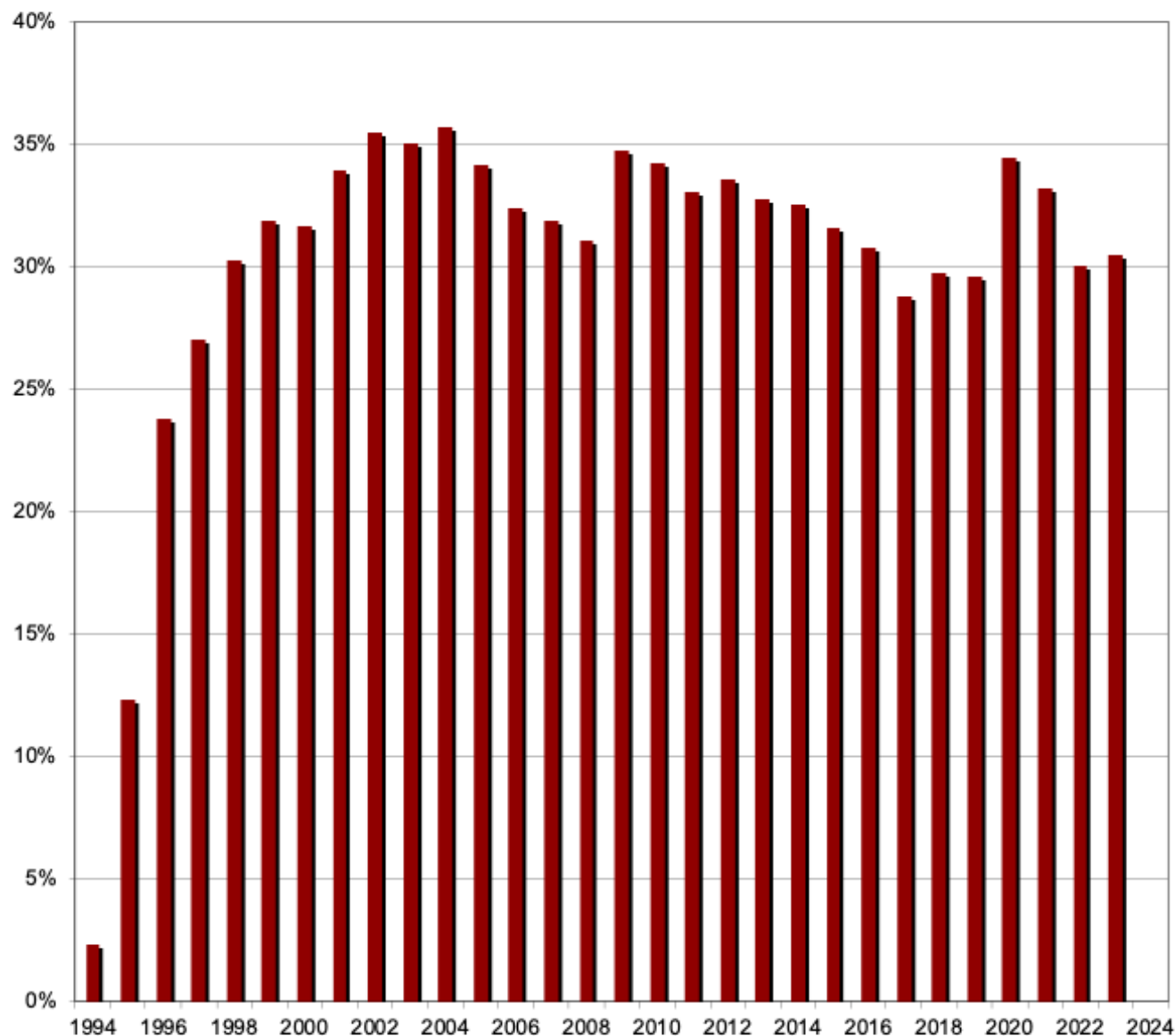
Tribal casinos came onto the market in 1994 when the Cow Creek converted their bingo hall to a small casino. Soon after that, a temporary casino opened on the Umatilla Reservation. In 1994, Oregon tribal casinos had a two percent market share. Other Tribes followed; Tribes had six casinos by the end of 1995. They prospered. Tribal casinos became major employers and contributors to rural economies.

The expansion was met by strong competition from the Oregon Lottery. The Lottery aggressively expanded. They located poker slot machines in bars throughout the state and especially in urban areas. Tribes could not expand into those areas. Then the Oregon Lottery increased the maximum number of VLTs per bar from five to six. The state limited Tribes to a fixed number of VLTs. The Oregon Lottery then added line games, which are non-poker VLTs preferred by players.

The effect of the growing competition from the Oregon Lottery and the limits on tribal gaming imposed by the state caused the market share of Tribes to fall from a peak of 35.5 percent in 2004 to 30.5 percent in 2023, as shown in Figure 10. Except for the COVID disruption, the share of gaming in Oregon held by tribes has been static.



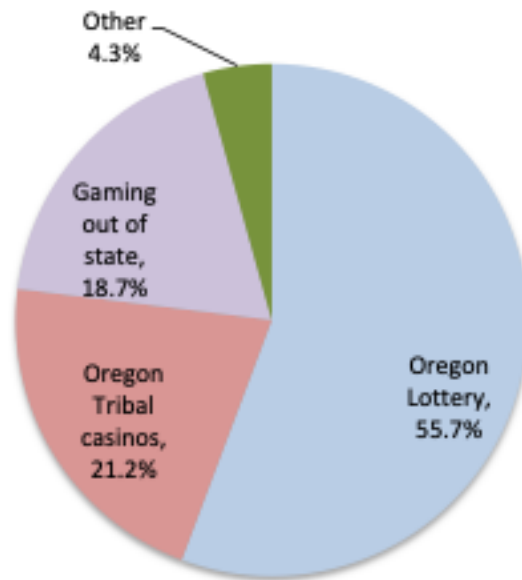
**Figure 10: Tribal Casino Share of the Oregon Gaming Market, 1994-2023**



In 2023, Oregonians spent \$2.45 billion on gaming. Of that 18.7 percent was spent out of state. About 55.7 percent of the spending on gaming done by Oregonians went to Oregon Lottery games, while Oregon Tribes accounted for 21.2 percent of the total.

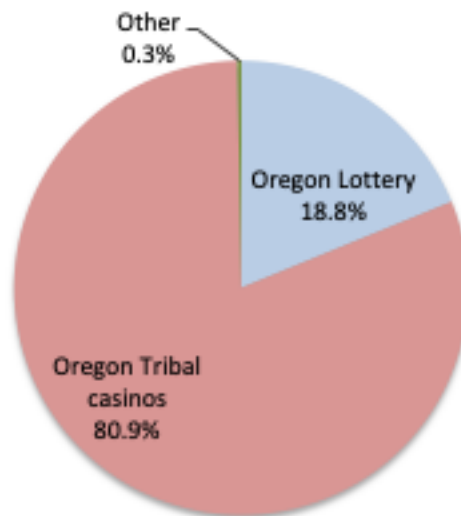


**Figure 11: Where Oregonians Gambled, 2023**



Out of state visitors spent \$172 million on gaming in Oregon. Tourists are far more likely to wager at Oregon tribal casinos than either the Oregon Lottery, charity games, or horse racing; about 80.9 percent of tourist spending happened in Oregon at the tribal casinos.

**Figure 12: Where Tourists Gambled in Oregon, 2023**



## Oregon Lottery VLTs

VLTs are the Oregon Lottery's main source of gaming revenues—accounting for 84 percent of all the money they make. The Oregon Lottery competes against tribal casinos for many of the same players. The Oregon Lottery has several competitive tools. Among them are introducing new games, raising jackpots, raising minimum wagers, and changing player hold rates.<sup>13</sup> Lower hold rates attract more players than higher hold rates. The hold rate is the percent of a player's bet that, on average, they lose, and the Oregon Lottery makes.

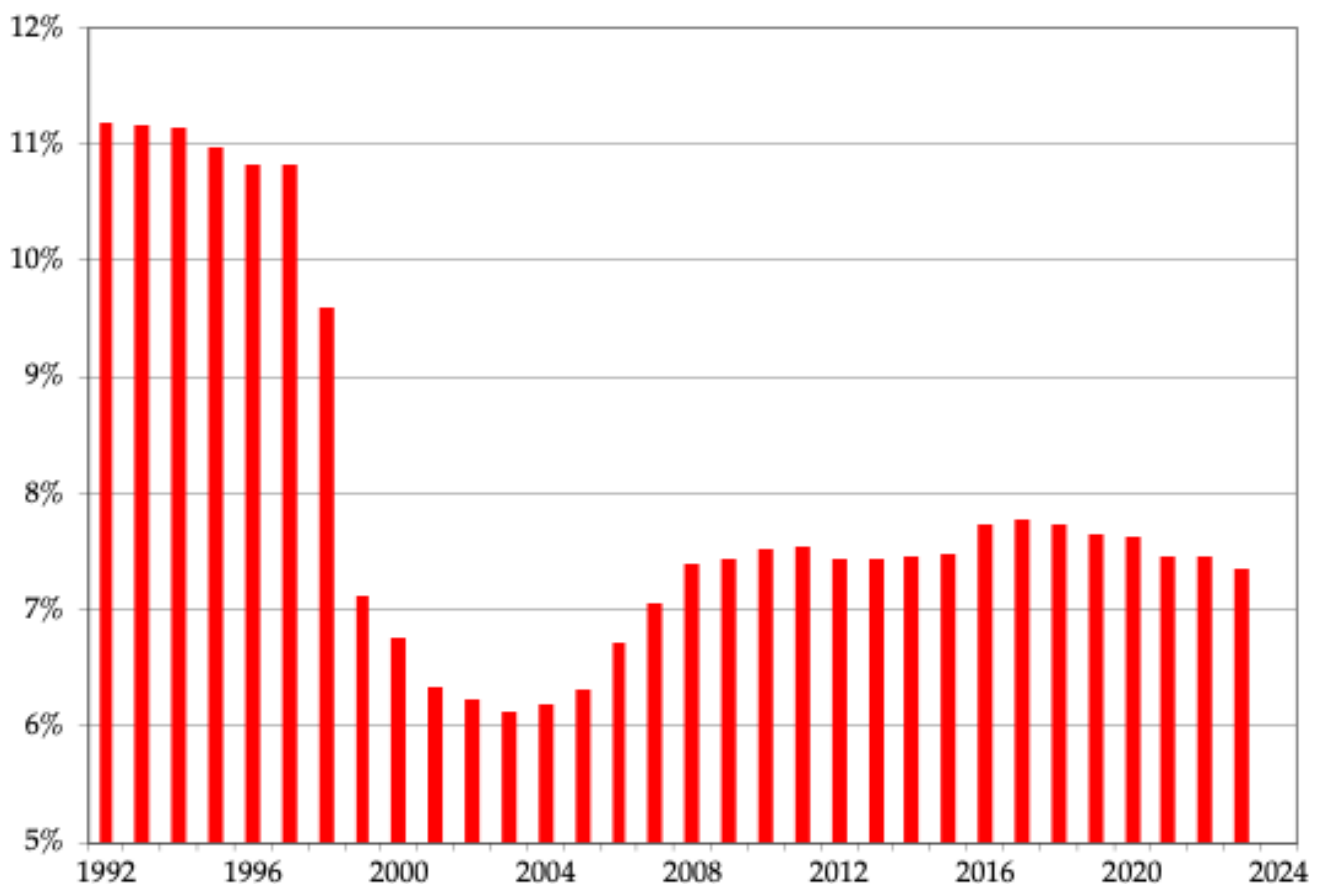
The Oregon Lottery gets 84.1% of its revenues from VLTs. This is because their VLT hold rate is competitive; in 2023 the hold rate was 7.34% compared to the highly competitive Nevada market, which averaged 7.16% as illustrated in Figure 13. The average hold rate on other traditional lottery games is about 33 percent. In addition, the Oregon lottery has a monopoly on gaming statewide, which makes access to gaming easy as nearly all bars in the state have VLTs. Also, people can bet on sports almost anywhere in Oregon from the Oregon Lottery using their cellphones. In contrast, tribes are strictly limited to one location each for class 3 casinos and those locations must be on tribal trust land. Tribes cannot offer sports betting on mobile devices beyond their trust lands.

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<sup>13</sup> The hold rate is the average percent of every dollar wagered that is lost by players.



**Figure 13: Average Hold Rate on Oregon Lottery VLTs by Fiscal Year, 1992-2023**



*Note: Fiscal year ending June 30.*

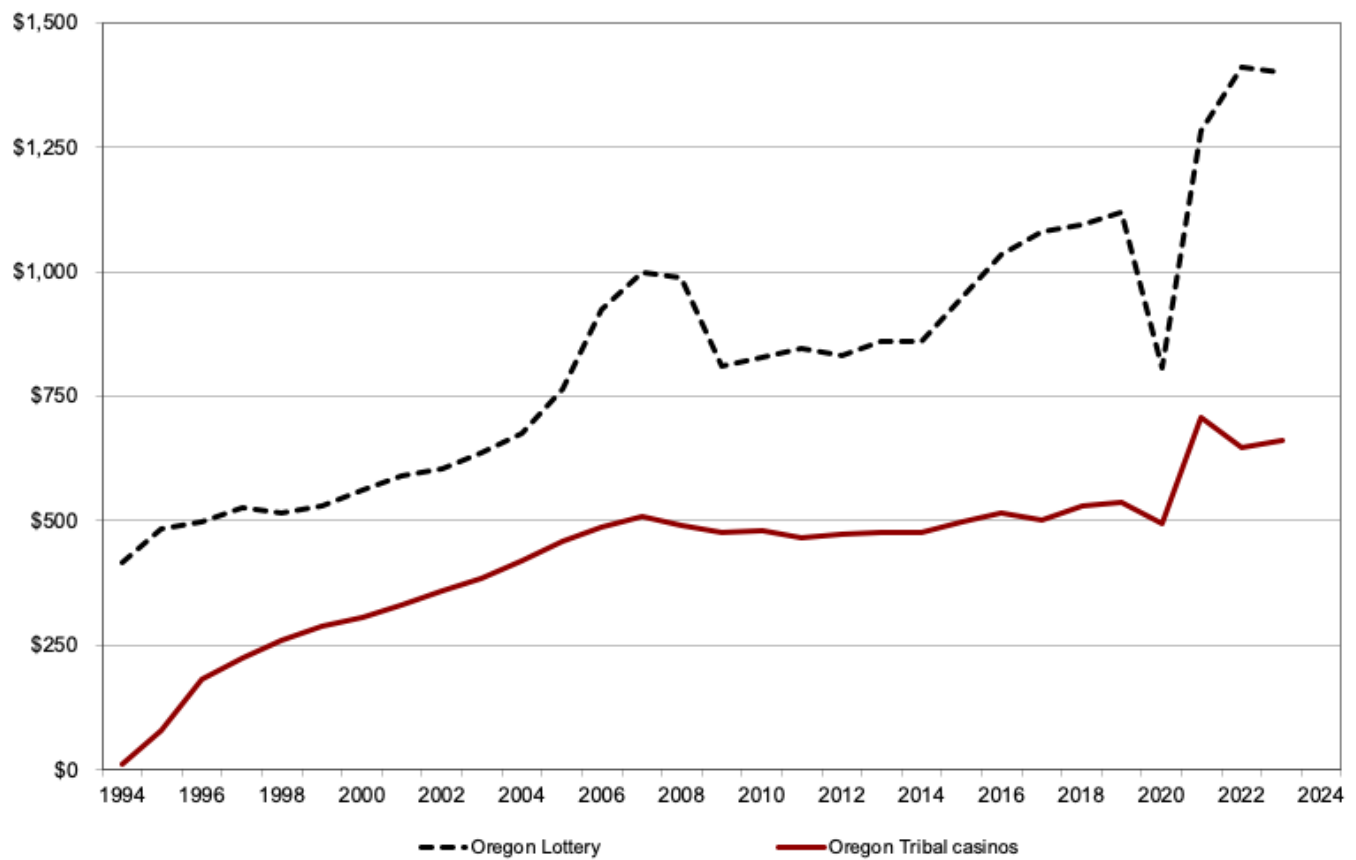
*Source: Oregon Lottery.*

The Oregon Lottery has a major market advantage over Tribes. They have a geographic monopoly and an ability to offer games on mobile phones statewide. Only the Oregon Lottery can offer convenience gaming. Tribes are limited in the number and locations of their casinos, and the variety of games they may offer. The principal way the Lottery competes is through widespread distribution of VLTs, especially in fast-growing, high-income parts of Oregon, by limiting hold rates to encourage more play, and by adding new VLT titles that attract more action. The Oregon Lottery made \$1.4 billion in total gaming revenues in 2023., while tribes generated \$660 million in gaming revenues.

The Oregon Lottery also benefits by not employing people to operate VLT venues. Instead, the bars and restaurants pay all labor costs, rent, utilities, and other expenses. In 2023, the Lottery spent \$311 on operating expenses, commissions, and equipment for every thousand in gaming revenues they earned. Oregon Tribes spent \$938.



**Figure 14: Trend Gaming at the Oregon Lottery versus Oregon Tribal Casinos, 1992-2023, Millions \$**



Sources: Oregon Tribal Gaming Alliance, ECONorthwest, and the Oregon Lottery.