



Reports

US MARKET REPORT

State by State

Tribal Gaming

G3's state-by-state guide to the US Tribal Gaming Market. We describe the market, the operations, gaming machines and operators across 13 US states, many playing host to commercial casino and tribal casinos, others exclusively tribal-only.



MEET US AT ICE 2024 S7-210



www.fazicompany.com

REPORTS

TRIBAL GAMING / STATE-BY-STATE



ARIZONA

Arizona has no commercial casino venues but has 25 tribal casinos (2022) operated by 22 tribes which are governed by the Arizona Tribal-State Gaming Compacts. Each compact with the 22 tribes last for 10 years and can be renewed for another 10 years and an additional two years.

A total of 16 Arizona tribes operate 25 Class III casinos with more than 19,600 slots in total and another six tribes operate just slot machine rights they can lease to other tribes with casinos.

Under the compact a maximum of 1,400 gaming machines are authorised at each facility. The compact also permits for 100 card game tables at facilities located more than 40 miles from any town with more than 400,000 and 150 card tables at casinos within 40 miles of a town with 400,000. As of January 2022 there were around 550 card and table games in operation.

An amendment to the tribal compacts in April 2021 authorised landbased sports betting at major professional sports arenas and up to 10 racetrack and off-track betting locations.

Online sports betting can also be offered by a maximum of 20 licensed platforms partnered with either a professional sports team or facility or one of the 25 casinos operated by the Indian tribes. Since then sports betting has boomed.

Between September 2021 and November 2022 more than \$7.1bn

was spent on wagers in the state and 99 per cent of this was from online betting. This has provided the state with \$30.7m in tax revenue.

The year 2022 was the first time since Covid that all three commercial horse tracks resumed live racing.

CALIFORNIA

There are no commercial casinos in California but there are 67 tribal casinos and 60 plus card rooms plus racetracks and lottery. The California Gambling Control Commission governs the tribal gaming operations in the state.

Some 64 tribes operate casinos across 30 counties and include large scale venues such as Pechanga Resort and Casio and Thunder Valley Casino.

A 2012 compact varies the number of Class III slots allowed per casino with some tribes able to operate more than the 2,000 it was previously limited to. Wheel or dice games such as roulette or craps however are prohibited.

Tribal operators have exclusivity on Class III gaming and gaming tables and there is a long-standing battle with player-banked card rooms (poker) over the legality of how these card rooms operate as many have found loopholes to offer most casino table games.

Last year the tribes tried another

A TOTAL OF 16 ARIZONA TRIBES OPERATE 25 CLASS III CASINOS WITH MORE THAN 19,600 SLOTS IN TOTAL AND ANOTHER SIX TRIBES OPERATE JUST SLOT MACHINE RIGHTS THEY CAN LEASE TO OTHER TRIBES WITH CASINOS.

SOME 64 TRIBES OPERATE CASINOS ACROSS 30 COUNTIES IN CALIFORNIA AND INCLUDE LARGE SCALE VENUES SUCH AS PECHANGA RESORT AND CASIO AND THUNDER VALLEY CASINO.

tack to sue via a bid to legalise sports betting. There were two main proposals put forward to the state last year which both failed to move forward.

Proposition 26 would have allowed tribal casinos and the state's four major racetracks offering in-person sports betting and at the same time there was a provision to enable operators to file civil cases against card rooms for illegal gambling.

The initiative, bankrolled by several tribes to the tune of more than \$200m, would also have permitted roulette and dice games in casinos.

A second proposition (Proposition 27) would have allowed online and mobile sports betting outside of native lands offered by licensed tribes and gaming/online companies.

It was estimated around \$400m was spent in total by the tribes and large gaming companies backing the online initiative to push their proposals forward.

It is suggested that Californians were making \$15.7bn in illegal sports bets placed via friends, bookies or offshore sites which if legalised could generate around \$500m annually for the state.

Although online gambling could theoretically take revenues away from tribal casinos, gambling companies must partner with local tribes to operate.

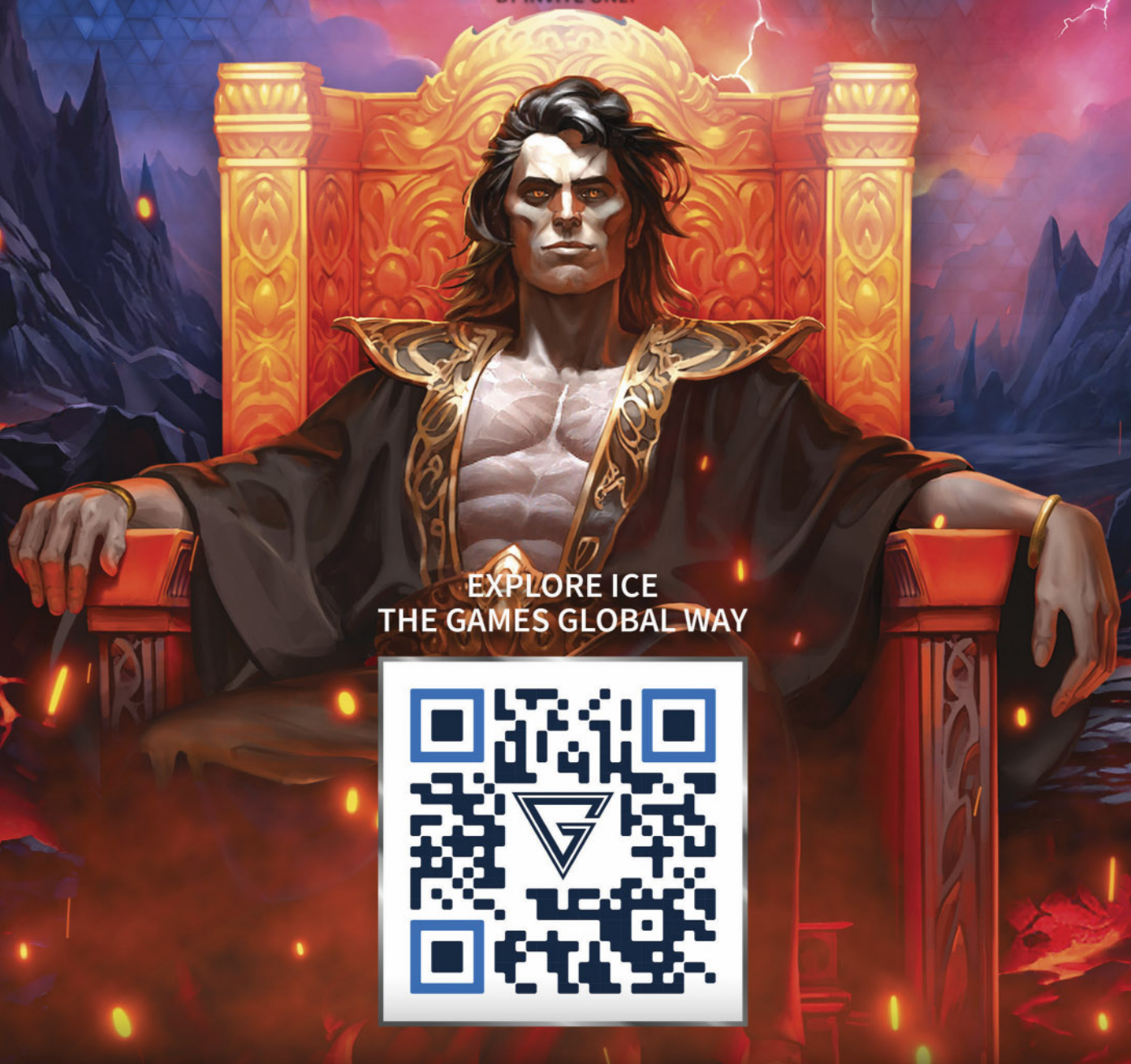
In November last year both propositions were rejected by

GAMES  GLOBAL

DISCOVER A WORLD OF EPIC iGAMING CONTENT

MEET THE EXCEPTIONAL STUDIOS BUILDING THE FUTURE OF iGAMING.
JOIN US AT STAND N5-120 AND STEP ABOARD THE SUNBORN YACHT*.

*BY INVITE ONLY



EXPLORE ICE
THE GAMES GLOBAL WAY



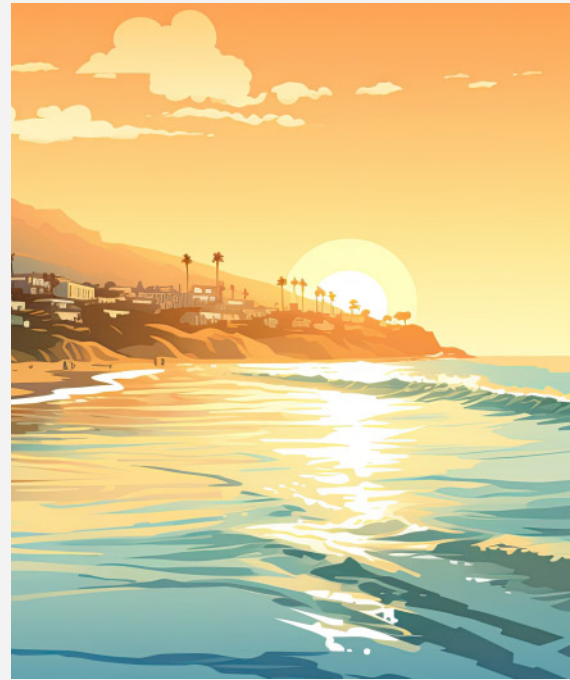
ICE[®]
LONDON

6-8 FEBRUARY

STAND N5-120

REPORTS

TRIBAL GAMING / STATE-BY-STATE



voters 67 per cent against Prop 26 and 82 per cent against Prop 27.

In May this year a moratorium was reinstated banning any new card rooms to be opened for the next 20 years although those with less than 20 tables can increase the number by two tables in the first year and up to two additional tables every four years thereafter.

The state is home to 16 major league sports teams and is also said to be the biggest untapped sports betting market in the US.

FLORIDA

Florida offers eight commercial casinos and seven tribal casinos, six of which are operated by the Seminole Tribe of Florida – Classic Casino Hollywood, Coconut Creek, Hard Rock Hollywood, Hard Rock Tampa, Brighton and Immokalee.

The tribe opened Classic Casino in 1979 which was the country's first large stakes bingo hall and casino and later expanded with gaming machines and poker. The Seminole Classic Casino Hollywood today is home to over 900 slots whilst its flagship Hard Rock brand includes the Seminole Hard Rock Hotel and Casino Hollywood which has 3,000 slots and 193 table games and 45 table poker room and the Hard Rock in Tampa which operates 5,000 slots and 179 table games and 46 room poker room.

The Brighton casino with 400 slots will be replaced in a couple of

FLORIDA OFFERS EIGHT COMMERCIAL CASINOS AND SEVEN TRIBAL CASINOS, SIX OF WHICH ARE OPERATED BY THE SEMINOLE TRIBE OF FLORIDA – CLASSIC CASINO HOLLYWOOD, COCONUT CREEK, HARD ROCK HOLLYWOOD, HARD ROCK TAMP, BRIGHTON AND IMMOKALEE.

THERE ARE NO COMMERCIAL CASINOS IN THE STATE OF IDAHO BUT 10 TRIBAL CASINOS ARE CURRENTLY OPEN.

years by a newly built casino, hotel and entertainment complex which is currently being constructed three miles away from the original on the Brighton Seminole Reservation.

The new casino will include space for 623 slots and 18 table games plus dining facilities and indoor event space and the first hotel to be built on the Brighton reservation with 100 rooms on four stories, pool, bowling alley and outdoor entertainment stage.

The commercial casinos face significant competition from the tribal casinos as although the commercial casinos are limited to operating electronic gaming devices, the tribal casinos can offer blackjack and baccarat.

In early 2021 the state signed an exclusive gambling deal with the Seminole tribe enabling them to also offer roulette and craps at casinos plus the monopoly on both landbased and online sports betting in the state. The 30-year agreement allowed the tribe to partner with pari-mutuel betting operators for which they would pay a 13.75 per cent share plus a 10 per cent contribution from its casino sportsbooks to the state.

This issue has been subject to various ongoing legal debates after commercial casinos argued that the compact was invalid as mobile sports betting could be offered to players throughout the state and therefore not limited to tribal lands.

The US Circuit Court of Appeals reversed the decision and forced

Hard Rock Digital's sportsbook app offline after just over a month of operating in December 2021. A request for a full hearing from the commercial casinos has been rejected and pari-mutuel operators say they intend to ask the Supreme Court to take up the issue.

The compact agreement also allows the Seminole Tribe to develop three new casino-resorts on reservation lands near Fort Lauderdale. In exchange the tribe pledged to pay the state a minimum of \$2.5bn over the first five years initially.

The decision is due to set a precedent for other states such as Kansas also due to launch retail and mobile sports betting via tribal casinos and three other tribal states looking at similar plans such as North Dakota.

IDAHO

There are no commercial casinos in the state of Idaho but 10 tribal casinos are currently open.

The Shoshone-Bannock Tribes own and operate three gaming properties – the Shoshone-Bannock Casino Hotel in Pocatello which opened in 2019 and has 900 slots and bingo, 150 room hotel and five restaurants, Sage Hill Casino and Travel Center with 100 slots and Bannock Peak Casino and Truck Stop in Pocatello with 60 slots.

The tribe has plans to open a fourth



The eWallet with infinite possibilities



PayAnyBank



eWallet



Cashier iFrame



PayAnyCard

MiFinity eVoucher

eVouchers

MiFinity is the ultimate payments provider for the iGaming space. With a broad range of products designed to increase deposit and payout success rates, player retention and operational efficiency, we've got you covered. Discover why thousands of players sign up for the MiFinity eWallet every day

✉ sales@mifinity.com 🌐 mifinity.com/business

Sign up to the MiFinity Affiliate Program at our ICE stand (N5-300) and benefit from a fixed

35% REVSHARE

for the first 2 months

Subject to T&C



✉ affiliates@mifinity.com 🌐 mifinityaffiliates.com

The small print
www.mifinityaffiliates.com/terms-and-conditions/
www.mifinity.com/legal



REPORTS

TRIBAL GAMING / STATE-BY-STATE



casino in Mountain Home which is off tribal lands which is possible via the 'land-in-trust' special permission process. The tribe has been planning the casino for more than a decade and bought the 157-acre plot of land in early 2020.

The \$311m 500,000sq.ft casino will include 2,000 slots, a 250 room hotel, six restaurants, event centre and bowling, theatre and arcade area and horse racing track.

The tribe discussed a joint venture with the Shoshone Paiute tribe but negotiations have been unsuccessful and both tribes are now pushing ahead with individual plans. This is Paiute's first casino proposal, also in Mountain Home, but despite a letter of intent nothing further has happened to date.

The Paiute tribe says it has its eye on a plot and has been trying to pursue a casino in Mountain Home since the 1990s and declined a joint venture as establishing their own casino would offer more economic opportunities to tribal members and be a boost for their community which suffers high poverty rates.

KANSAS

There are four commercial casinos and seven tribal casinos in Kansas. Commercial casinos can offer slots and table games and after legislation was passed in September last year retail and mobile sports betting are now also

THERE ARE SIX ONLINE SPORTSBOOKS OPERATIONAL IN KANSAS. THE FIRST YEAR SAW \$7M IN STATE TAX REVENUE FROM SPORTS BETTING FROM \$1.85BN IN WAGERS AND \$166.4M IN REVENUE.

IN 2019 LAWMAKERS AUTHORISED THE STATE'S COMMERCIAL CASINOS AND 12 INDIAN TRIBES TO OFFER STATEWIDE ONLINE BETTING AND IGAMING THROUGH A SINGLE SPORTSBOOK, CASINO AND POKER PLATFORM AFFILIATED WITH EACH CASINO OR TRIBE.

permitted via landbased sportsbooks within the casino properties.

The legislation means commercial casinos are authorised to partner with up to 50 retail locations and host sports wagering kiosks at their facilities.

There are six online sportsbooks operational in Kansas including BetMGM, DraftKings, Caesars, PointsBet and FanDuel. The first year saw \$7m in state tax revenue from sports betting from \$1.85bn in wagers and \$166.4m in revenue.

Meanwhile the Prairie Band Casino and Resort will become the first tribal casino in the state of Kansas to offer sports betting at the end of the year after a new tribal-state gaming Compact was signed in July this year.

The tribe's retail outlet is due to be opened later 2023 whilst the mobile app waits on Florida's decision concerning bets offered remotely outside of 'tribal lands'. The tribe has signed a partnership with Kambi.

Prairie Band Casino opened in 1998 near Topeka as the first full service casino in Kansas and is operated by the Prairie Band Potawatomi Nation and it holds 1,200 slots, 25 table games and 400 seat bingo hall.

The seven tribal casinos are governed by the State Gaming Agency and the first tribal casino, Golden Eagle (Kickapoo Tribe) opened in 1996 on Kickapoo reservation which were later followed by the Sac and Fox Casino

(Sac and Fox Tribe), Prairie Band Casino, Casino White Cloud (Iowa Tribe), 7th Street Casino and Crosswinds Casino (Wyandotte Nation) and Downstream Casino Resort (Quapaw Tribe).

MICHIGAN

There are just three commercial landbased casinos in Michigan and 23 tribal Class III casinos operated via 12 compacts with tribes throughout the state. Commercial casinos were first authorised in 1996 after a referendum permitted a maximum of three casinos in Detroit.

In 2019 lawmakers authorised the state's commercial casinos and 12 Indian tribes to offer statewide online sports betting and igaming through a single sportsbook, casino and poker platform affiliated with each casino or tribe.

Online gaming began in January 2021 and by end of last year there were 15 online sportsbooks, 14 internet casinos and three online poker platforms operations.

In 2022 total GGR from igaming amounted to \$1.58bn whilst sports betting saw a GGR of \$400m.

In the month of July 2023 state and tribal casinos reported a combined total GGR from igaming of \$153.6m and \$22.5m GGR from sports betting.

Of the 12 tribes the biggest operators include Pokagon Band of

soft**2**bet

PLAYER ACCOUNT
MANAGEMENT

MEGA

Motivational Engineering
Gaming Application

CASINO

SPORTSBOOK

PAYMENT
GATEWAY

TURNKEY
SOLUTIONS

MANAGED
SERVICES

OMNICHANNEL/
RETAIL
SOLUTIONS

MARKETING
SERVICES



ICE[®]
LONDON

**BOOK A MEETING
STAND S6-210**



REPORTS

TRIBAL GAMING / STATE-BY-STATE



Potawatomi Indians which have three Four Winds Casinos in the state, Saginaw Chippewa Indian Tribe with three Soaring Eagle Casinos and Sault Ste. Marie Tribe of Chippewa Indians with five Kewadin Casinos.

The first compact began in 1993 (Bay Mills Indian Community) and the tribes pay two per cent of the net win to the local government which amounted to a total of \$30.8m in 2022 plus an additional payment of \$52.8m to the Michigan Strategic Fund and Michigan Economic Development Corporation.

NEVADA

With 216 commercial casinos Nevada has a longstanding reputation as a major gambling destination. Last year total statewide commercial casino gaming revenue amounted to a record \$14.84bn, up more than 10 per cent on the previous year.

Commercial casinos in Reno and other areas of northern Nevada face competition from tribal casinos in northern California whilst there are four tribal casinos located in Nevada. Only two of Nevada's 32 tribes operate casinos – the Moapa Band of Paiutes which run the Moapa Paiute Travel Plaza with 100 slots and the Moapa Tribal Store with seven slots, whilst the Washoe Tribe owns the Wa She Shu Casino and Travel Plaza outside Carson City which opened in 2016. A California tribe, Fort

Mojave Indian Tribe runs the Avi Resort and Casino in Laughlin with 750 slots and 18 table games and a 452 room hotel. This opened back in 1995.

However, the playing field changed in 2021 when three Native American tribes rode into town to operate state-licensed casinos in Las Vegas (not on Indian lands) including:

- Mohegan Tribe (Connecticut) – the Mohegan Casino at Virgin Hotels was the first Native American operated casino in Las Vegas and is licensed via the Nevada Gaming Control Board. Although the company began in 1996 with a gaming facility in Connecticut today they operate nine casino properties spanning the United States (Connecticut, Washington, Pennsylvania, New Jersey and Nevada), Canada (Niagara Falls) and Northern Asia (Incheon, South Korea). The Las Vegas casino opened in March 2021 via a joint venture with JC Hospitality and is 60,000 sq.ft of gaming with 550 slots and 50 plus table games.

- San Manuel Tribe (California) – a second out-of-state tribe purchased the Palm Casino Resort in Las Vegas at the end of 2021 and re-opened last year. The tribe owns the Yaamava' Resort Casino in California, the largest casino resort west of Las Vegas. It has a 17 floor hotel tower with 432 rooms and suites and pool, spa and 24 hour dining facilities. The casino houses 7,200 slots and five high limit

gaming rooms. The San Manuel tribe is located near the city of Highland in California whilst the San Manuel Gaming and Hospitality Authority governs the operations outside of the reservation.

- Seminole Tribe (Florida) – The Seminole Hard Rock brand bought the Mirage Hotel and Casino last year and is re-branding it as the Hard Rock Las Vegas. The iconic Guitar Hotel currently being constructed will house 638 guest rooms and suites and will sit on the site of the Mirage volcano. The casino has 2,700 slots and nearly 200 table games and a 45 table poker room. The Seminole Tribe operates six other casinos in Florida.

NEW MEXICO

There are 21 tribal casinos and five commercial casinos (racinos) located in New Mexico. Electronic gaming has been permitted at state racetracks since 1997.

Although there is no statutory limit on the number of racinos which can operate the state's existing compacts with the tribes permit no more than six commercial racinos. A sixth racino has yet to be granted a licence. Each can operate a maximum of 750 slots and no table games with restrictions on operating hours. The law only permits sports betting on horse racing.

WITH 216 COMMERCIAL CASINOS NEVADA HAS A LONGSTANDING REPUTATION AS A MAJOR GAMBLING DESTINATION. LAST YEAR TOTAL STATEWIDE COMMERCIAL CASINO GAMING REVENUE AMOUNTED TO A RECORD \$14.84BN, UP MORE THAN 10 PER CENT ON THE PREVIOUS YEAR.

THERE ARE 21 TRIBAL CASINOS AND FIVE COMMERCIAL CASINOS LOCATED IN NEW MEXICO. ELECTRONIC GAMING HAS BEEN PERMITTED AT RACETRACKS SINCE 1997.



NOVO VISION™

The visionary solution



The award-winning
Casino Management System

powered by NOVOMATIC



NOVOMATIC
Winning Technology

NOVOMATIC AG • nbs@novomatic.com
Jens Einhaus +43 664 8850 7997 • Werner Kearns +43 664 8844 1289
www.novomatic.com

REPORTS

TRIBAL GAMING / STATE-BY-STATE



A BILL IN 2021 (HB101) REQUESTED PERMISSION FOR TABLE GAMES AND SPORTS BETTING AT THE STATE'S FIVE RACINOS AND REMOVE OPERATING HOUR LIMITS. IF THIS WAS INTRODUCED THE CASINOS COULD BRING IN \$40M A YEAR FOR THE STATE BUDGET.

THERE ARE NO COMMERCIAL CASINOS IN NORTH CAROLINA AND JUST THREE TRIBAL CASINOS. TWO OF THE CASINOS ARE OWNED BY THE EASTERN BAND OF CHEROKEE INDIANS WHICH IS ONE OF EIGHT TRIBES IN THE STATE.

New Mexico suffered the longest shutdown during the pandemic of all commercial properties in the US and after being closed down in March 2020 they didn't reopen until late February 2021.

State commercial gaming revenue in 2020 was just \$52m compared to \$244m in 2019 (a drop of 78 per cent). Last year saw revenues of \$262m.

The 21 tribal casinos operated by 14 Indian tribes are permitted to offer slots and table games and hold a monopoly on sports betting in the state due to their compact agreement which has a broad definition of what types of games are legal.

The Santa Ana Casino operated by Pueblo of Santa Ana was the first to launch the first sportsbook in October 2018 and there are currently only five venues offering sports betting although the Navajo Nation tribe is due to launch sports betting at its three casinos in New Mexico.

The tribe stretches into Arizona and recently launched a Hard Rock Sportsbook at its casino property - Twin Arrows property in Flagstaff. The sportsbook was opened in July and sits next to the remodelled sports bar and restaurant with eight kiosks and two betting windows.

This was the result of a 10-year agreement with the Seminole Tribe of Florida (Hard Rock Digital) for a new mobile wagering app which was launched initially in early 2022.

Navajo opened its first casino in New Mexico in 2008 (Fire Rock) followed by Flowing Water in 2010 and Northern Edge in 2012. In Arizona Twin Arrows opened in 2013 followed by Navajo Blue Travel Plaza in 2020.

A bill in 2021 (HB101) requested permission for table games and sports betting at the state's five racinos and remove operating hour limits. If this was introduced the casinos could bring in \$40m a year for the state budget. However, the tribes have voiced concerns about the expansion of non-tribal gaming in the state saying if the racinos offered more casinos games and sports betting the revenues would decline for tribal casinos affecting money for their communities. The bill failed to reach any momentum.

And earlier this year a bill was also filed requesting a review of the gaming market including online gaming authorisations. The bill was not passed by senators.

NORTH CAROLINA

Traditionally North Carolina has been quite conservative when it comes to gambling. It was reluctant to accept tribal casinos and bar one harness racetrack, pari-mutuel betting on horse racing was illegal until this year.

There are no commercial casinos in North Carolina and just three tribal

casinos. Two of the casinos are owned by the Eastern Band of Cherokee Indians which is one of eight tribes in the state but the only federally recognised tribe.

They operate Harrah's Cherokee Casino Resort which opened in 1997 and Harrah's Cherokee Valley River Casino which opened in 2015 - both are located in the western part of the state.

A third casino Catawba Two Kings Casino in King's Mountain opened in 2021 and is owned by the Catawba Indian Nation based just over the state line in South Carolina.

In 2021 the tribe negotiated in-person sports betting at their casinos and at the moment this is only permitted in the three casinos however a new betting law which permits online sports betting will arrive in the state early next year opening up the market significantly.

The Sports Wagering and Horse Racing Wagering Law HB347 legalised online and landbased sports betting and pari-mutuel race betting in June this year.

This allows for up to 12 online sportsbooks in the state (plus two tribal licences for Cherokee and Catawba) plus eight in-person sportsbooks at professional sports venues such as the NFL stadium, NBA and NHL arenas and NASCAR circuits.

Each licence costs \$1m for five years plus an 18 per cent sports wagering tax rate on gross betting receipts. It is anticipated that the

Evolution

NETENT



Ezugi



nolimit
CITY



DigiWheel

MEET US AT STAND N1-100

2880x 577x
LIGHTNING DRAGON TIGER
Live

RAGE

18+

LIGHTNING STORM
Live

PRIMATE KING
MEGAWAYS™

18+



www.evolution.com
MGA/CRP/187/2010

BeGambleAware.org

PLEASE GAMBLE RESPONSIBLY.

REPORTS

TRIBAL GAMING / STATE-BY-STATE



online sportsbooks could take \$6.8bn in bets by the second year of operations and generate \$610m in sports betting revenue for the state.

The North Carolina State Lottery Commission has the responsibility to licence and regulate the sector and has been given a year to set up with a possible launch date by early January 2024. The commission has hired GLI to assist with the launch.

Meanwhile the state is also discussing a draft bill to legalise four new casinos under a rural tourism incentive programme.

The plan is for three casinos to be built in Anson, Nash and Rockingham rural counties and a fourth, to be built by the Lumbee Tribe on reservation land in southeast North Carolina, is also under consideration.

The new casino plans could put pressure on the existing tribal casinos threatening gaming revenue which is said to be around \$1bn. They could also have an impact on casino developments in Virginia particularly the Caesars Virginia in Danville which is just on the border. The casino opened temporarily in May with the permanent venue due to open next year.

Caesars is expecting to see 50 per cent of its revenue come from North Carolina guests who will visit the 500 room hotel, 1,300 slot and 85 table game casino.

The Rockingham proposal will provide a closer gaming venue for

players around that area and be in direct competition to Danville.

The Anson project is about 35–45 miles east of Charlotte where the Catawba Two Kings Casino is located. This casino is currently in a temporary building. Plans to develop a permanent casino with 1,500 room hotel, 1,800 slots and 54 table games is currently on hold.

Operating rules state each of the casino projects would need to create at least 1,750 jobs and invest at least \$500m in private funds into each proposed district and operators must have 10 years plus experience in the gaming industry. Tax rate on GGR would be 22.5 per cent.

The bill would require the administration to start taking applications by December with a \$500,000 application fee and a \$7.5m proposal submission fee for each district development.

The Cordish Companies with its Live! Brand have been active in supporting this legislation although it could take a year or two for the proposal to mature.

It is reported that the three casinos alone could bring in \$1.6bn on an annual basis in terms of GGR and between \$336m and \$420m annually in tax revenue. If 30,000 VLTs were permitted in the state this could be boosted by nearly \$1.9m in GGR and \$380m minimum in taxes.

A proposal to legalise and regulate VLTs dates back to earlier this year after reports claimed up to 60,000

THREE CASINOS TO BE BUILT IN ANSON, NASH AND ROCKINGHAM RURAL COUNTIES AND A FOURTH, TO BE BUILT BY THE LUMBEE TRIBE ON RESERVATION LAND IN SOUTHEAST NORTH CAROLINA, IS ALSO UNDER CONSIDERATION.

NORTH DAKOTA HAS GAMING COMPACTS WITH FIVE TRIBES - SISSETON-WAHPETON, SIOUX TRIBE, SPIRIT LAKE TRIBE, STANDING ROCK SIOUX, THREE AFFILIATED TRIBES AND TURTLE MOUNTAIN BAND OF CHIPPEWA INDIANS.

plus machines are already in operation across the state in gas stations and sweepstake parlours. The bill would enable VLTs to be legally operated in bars and other locations and legislation would allow between six and 10 terminals per location.

NORTH DAKOTA

North Dakota has no commercial casinos but has gaming compacts with five tribes – Sisseton-Wahpeton, Sioux Tribe, Spirit Lake Tribe, Standing Rock Sioux, Three Affiliated Tribes and Turtle Mountain Band of Chippewa Indians – which operate 11 casinos between them.

There are no limits on the number of machines or gaming devices to operate. Pari-mutuel wagering and sports and Calcutta pools are permitted.

All five compacts came into force in 2013 and ran for 10 years with an automatic renewal announced and approved at the end of 2022.

Some changes were introduced including a lowering of the legal gambling age from 21 to 19 and enabling tribes to accept credit and debit cards at venues.

The new compacts also introduced open mobile sportsbooks which will be permitted at casinos on tribal lands but only accessible within these territories. It will also allow for casino style gaming via mobile apps, including digital slots



ICE

**STAND
N3-440**

REPORTS

TRIBAL GAMING / STATE-BY-STATE



and table games on tribal lands.

Several tribes have already opened retail sportsbooks in the state under interpretations of the previous compacts.

The tribes have pushed for exclusive rights to state-wide mobile wagering and online casino gaming but this has been rejected. Connecticut and Michigan are the only states to date where tribes have launched online casino gaming permitted off tribal lands.

The Seminole tribe sportsbook venture in Florida could also open the door for expanded online wagering opportunities in this state and other states.

OKLAHOMA

Oklahoma offers two commercial casinos at two racinos. These can only operate EGMs with a maximum of 750 slots permitted at Remington Park in Oklahoma City and 250 machines at Cherokee Casino Will Rogers Downs in Claremore.

The racinos were first authorised in 2004 during a state-tribal Gaming Act which set the regulatory framework for tribal gaming in the state.

The first compact in Oklahoma was signed in 1992 and today there are 140 tribal casinos making Oklahoma the largest tribal gaming state and these are authorised to offer slots and table

OKLAHOMA OFFERS TWO COMMERCIAL CASINOS AT TWO RACINOS. THESE CAN ONLY OPERATE EGMs WITH A MAXIMUM OF 750 SLOTS PERMITTED AT REMINGTON PARK IN OKLAHOMA CITY AND 250 MACHINES AT CHEROKEE CASINO WILL ROGERS DOWNS IN CLAREMORE.

THE CASINOS SUPPORT AROUND 76,000 JOBS AND GENERATED \$1.69BN IN TAX REVENUE AND TRIBAL REVENUE SHARE PAYMENTS LAST YEAR.

games. During fiscal year 2022 these casinos generated an estimated \$3.19bn in casino gaming revenue compared to \$150.9m from the two racinos.

The casinos support around 76,000 jobs and generated \$1.69bn in tax revenue and tribal revenue share payments last year.

Although Oklahoma borders other states with commercial casinos the main threat comes from potential legislation in Texas.

Meanwhile a second bid to get sports betting legalised in the state via House Bill 1027 has failed again in Oklahoma.

The bill was submitted in March but failed to get out of a Senate committee before the deadline and it could be another year before it has the chance of working its way through the legal procedure.

This is the second time in two years efforts to legalise sports betting have collapsed. For this to work the state and the 35 federally recognised tribes which operate the casinos at the moment have to agree on terms. The HB1027 would have given the tribes the discretion to offer in-person and online sports betting and came with a sliding fee system for revenue sharing with the state:

- 4% for the first \$5m in monthly net win from sports betting.
- 5% for the following \$5m of adjusted gross revenue
- 6% for subsequent adjusted gross revenues

It was estimated that sports betting could bring in up to \$10m a year in tax revenue of which 12 per cent would go to the general fund and 88 per cent towards education. The Senate has indicated it requires further talks via the tribes and the governor before it proceeds.

Currently only one Oklahoma tribe, the Quapaw Nation, offers a mobile sports app but they can only offer sports betting in neighbouring Arkansas via the Saracen Casino Resort where it has a state commercial gaming licence.

Meanwhile litigation continues after new compacts were signed with Governor Kevin Stitt and four tribes in 2020. This gave Otoe-Missouria Tribe, Comanche Nation, United Keetoowah Band of Cherokees and Kialegee Tribal Town all the authority to offer sports wagering on tribal lands. The compacts were invalidated by the Oklahoma Supreme Court but political disputes continue.

TEXAS

Laws in Texas prohibit casino gambling although these are superseded by federal Indian gaming laws and there are three federally recognised tribes in the state which can operate casinos with Class II gaming on reservation lands.

The casinos are the Kickapoo Lucky Eagle Casino which is operated by the Kickapoo Traditional Tribe of Texas in Eagle

GR8 ^{TECH}

WIN TICKETS TO F1 GR8 QUIZ

BOOTH **S9-165**



REPORTS

TRIBAL GAMING / STATE-BY-STATE



LAWS IN TEXAS PROHIBIT CASINO GAMBLING ALTHOUGH THESE ARE SUPERSEDED BY FEDERAL INDIAN GAMING LAWS AND THERE ARE THREE FEDERALLY RECOGNISED TRIBES IN THE STATE WHICH CAN OPERATE CASINOS WITH CLASS II GAMING ON RESERVATION LANDS.

A PUSH TO BRING CASINOS TO TEXAS FAILED THIS YEAR AFTER IT FELL JUST SHORT OF THE REQUIRED TWO-THIRDS MAJORITY TO PUSH THE BILL THROUGH DURING A HOUSE VOTE.

Pass (Maverick County); the Naskila Gaming operated by the Alabama Coushatta Tribe of Texas in Livingston and the Speaking Rock Casino operated by the Ysleta del Sur Pueblo in El Paso

All three have battled for years to remain open through various attempts to close down the casinos.

In 2015 Naskila and Speaking Rock were given permission via the NIGC to operate electronic bingo on their reservations. A legal fight began to try to and prevent this and finally in 2022 the Supreme Court approved the operations. Naskila operates around 800 electronic bingo terminals.

Meanwhile a push to bring casinos to Texas failed this year after it fell just short of the required two-thirds majority to push the bill through during a House vote.

Las Vegas Sands Corporation and other casino giants have been backing the casino legislation proposals which would add casino licences to existing horse and dog racing licences to create eight resort style casinos for the state. If Texas allowed gaming it will attract players who currently head out of state to Oklahoma, Louisiana and New Mexico to gamble.

Meanwhile a sports betting proposal backed by a coalition of Texan pro-sports teams and betting companies did get voted in the House but died in the state Senate in June with supporters saying they will make another attempt in 2025.

WISCONSIN

There are no commercial casinos in Wisconsin but 11 tribes operate 24 casinos.

Despite no sports betting law Wisconsin, in a similar way to New Mexico, can operate sports betting by virtue of amendments to their compacts.

The tribes can negotiate with the state to change their existing compacts to allow for sports betting and to date only three such amendments have become active.

At the end of 2021 the state opened its first legal sports betting facility at the Oneida Casino in Green Bay and this was followed by agreements with Forest County Potawatomi and St. Croix Chippewa in 2022.

In-person sports betting can now be offered at six casinos owned by the three tribes. Potawatomi plans to construct a new facility for sports betting and currently hosts via a temporary location with 17 self-service kiosks or via the counters at the Wilwaukee casino with plans to install further kiosks at its sister casino at the Carter Hotel in Wabeno.

St. Croix operates three casinos in Turtle Lake, Danbury and Hertel and is installing sports betting at all three locations.

Online sports betting can only be offered on reservation lands. Oneida, which owns two casinos and about eight truck stops in the Green Bay area, does also offer a sport betting app.

THERE ARE NO COMMERCIAL CASINOS IN WISCONSIN BUT 11 TRIBES OPERATE 24 CASINOS. DESPITE NO SPORTS BETTING LAW WISCONSIN, IN A SIMILAR WAY TO NEW MEXICO, CAN OPERATE SPORTS BETTING BY VIRTUE OF AMENDMENTS TO THEIR COMPACTS.

ONLINE SPORTS BETTING CAN ONLY BE OFFERED ON RESERVATION LANDS. ONEIDA, WHICH OWNS TWO CASINOS AND ABOUT EIGHT TRUCK STOPS IN THE GREEN BAY AREA, DOES ALSO OFFER A SPORT BETTING APP.



Beyond Gaming



Single platform for **LAND-BASED**



and **ONLINE GAMING**

Over 100 Attention-Catching games

Secure and Proven Solution

Single Platform

Unique Mathematics

Global Reach

Wide Range of Cashless Options

Modern Design



e-gaming s.r.o.
Revoluční 1082/8,
110 00 Praha - Nové Město

+420 774 713 992
info@e-gaming.cz

Visit us at ICE London
6-8 February 2024
Stand N5-440

www.e-gaming.cz