CNIGA

The State of Tribal Gaming in California

An Economic and Fiscal Impact Analysis of California Tribal Gaming

October 2024









BEACON ECONOMICS

This publication was created for:

The California Nations Indian Gaming Association

The California Nations Indian Gaming Association (CNIGA), founded in 1988, is a non-profit organization composed of federally recognized tribal governments. CNIGA is dedicated to protecting the sovereign right of Indian tribes to engage in gaming on federally recognized Indian lands. It serves as a planning and coordinating agency for legislative, policy, legal, and communication efforts on behalf of its members, and functions as an industry forum for information and resources.

This publication was prepared by:

Beacon Economics, LLC

Founded in 2006, Beacon Economics, an LLC and certified Small Business Enterprise with the state of California, is an independent research and consulting firm dedicated to delivering accurate, insightful, and objectively based economic analysis. Employing unique proprietary models, vast databases, and sophisticated data processing, the company's specialized practice areas include sustainable growth and development, real estate market analysis, economic forecasting, industry analysis, economic policy analysis, and economic impact studies. Beacon Economics equips its clients with the data and analysis they need to understand the significance of on-the-ground realities and to make informed business and policy decisions.

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Key Research Findings

Over the past decade, the three economic impact analyses conducted by Beacon Economics for CNIGA have consistently demonstrated growth in economic output, labor income, and employment, all driven by tribal operations. This trend highlights the vital and enduring role gaming tribes play in California's economy.

In 2021, the state's tribal spending contributed more than $25 billion to the economy, supported over 112,500 jobs, provided $7.6 billion in labor income for state workers, and generated over $3 billion in tax revenue for federal, state, and local governments. These figures show significant growth over the past decade: gaming operations have more than doubled in economic impact, while the impact of non-gaming operations grew by 250%. Jobs supported by gaming increased by over 50%, and those supported by non-gaming grew by 85%. Tax revenues generated from gaming doubled, while non-gaming tax revenues grew by over 200%.

Additionally, California's gaming tribes had a significant social impact through revenue-sharing agreements like the RSTF and TNGF. In 2021, $81 million was distributed to economically disadvantaged tribes, generating nearly $168 million in economic output, around $58 million in labor income, and supporting over 560 jobs. Charitable donations from gaming tribes further bolstered local communities, with $77 million given to causes such as education, health services, and public safety, resulting in nearly $158 million in output, over 530 jobs, and over $54 million in labor income.

Beacon Economics' findings are outlined below, categorized into gaming operations, non-gaming operations, and social impacts—including charitable contributions and revenue-sharing funds.

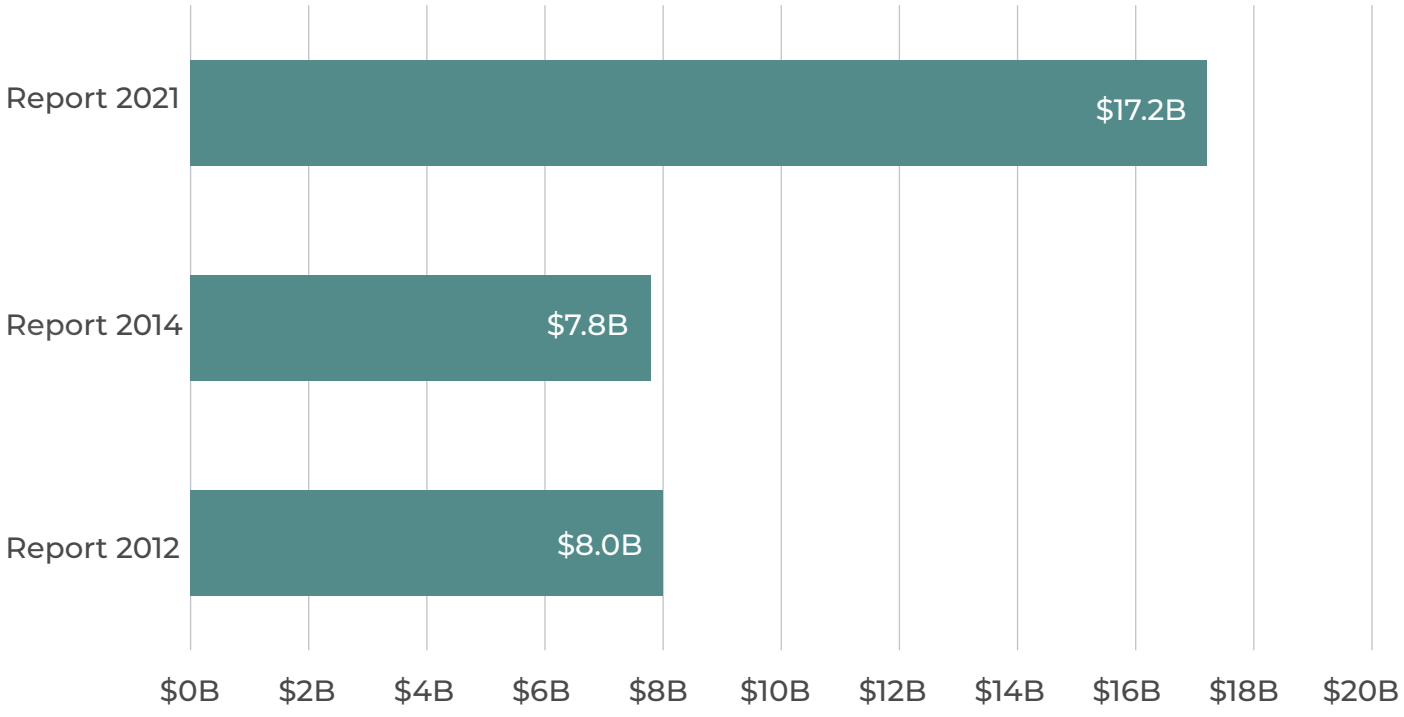
Tribal Gaming

- In 2021, expenditures from tribal gaming operations in California generated approximately $17.2 billion in economic output, supporting over 85,200 jobs statewide and resulting in $5.3 billion in earnings for California workers.

- As direct spending by tribal gaming operations circulated through the California economy, the indirect and induced impacts of these expenditures amounted to $7.9 billion in economic output and supported 33,649 jobs statewide.

- Total economic output stemming from tribal gaming operations more than doubled from 2012 to 2021, growing by 114%.

Total Economic Output by Data Year
Figure 1



Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics.

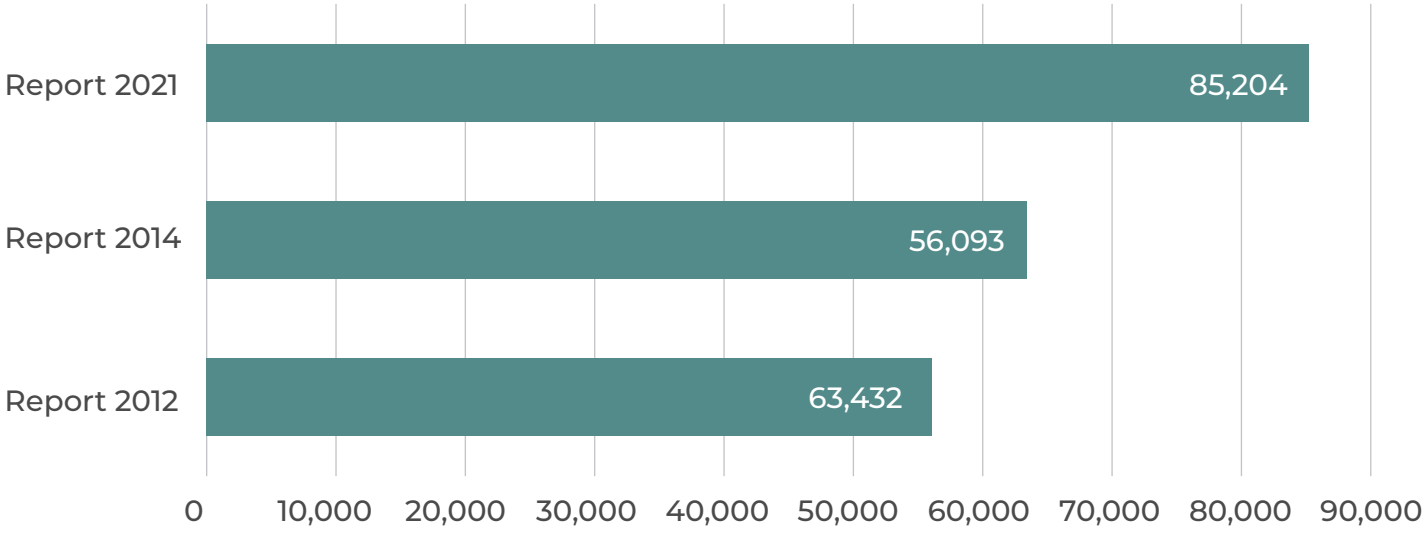


- Year after year, tribal gaming operations support a growing number of jobs in California. In 2012, these operations supported around 56,000 jobs statewide. By 2014, that number had increased to approximately 63,400 jobs, and in 2021, it surged to around 85,200 jobs.

- The 52% increase in jobs supported by tribal gaming operations outpaced the overall growth in nonfarm employment in California,[1] which grew 13.5% over the same period.

Total Employment by Data Year

Figure 2



Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics.

[1] https://fred.stlouisfed.org/series/CANA

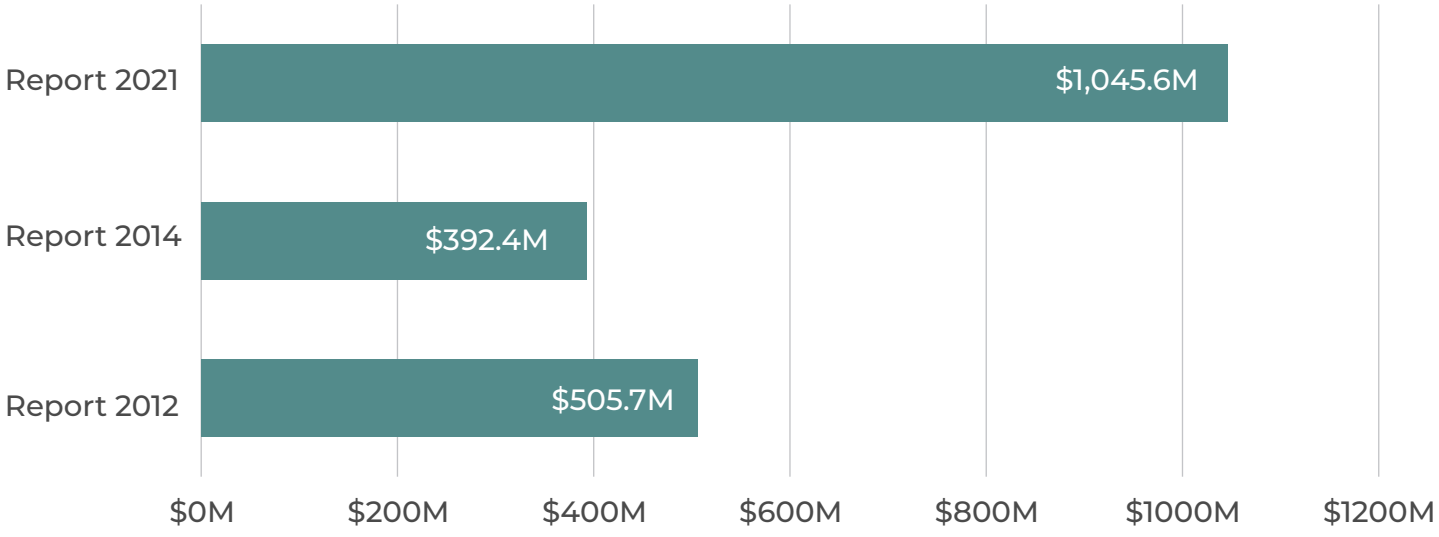


- Tribal gaming operations play a crucial role in generating tax revenue for California and beyond, contributing $2.2 billion in tax revenue to various levels of government in 2021.

- Since 2012, state and local tax revenue from tribal gaming operations has grown by 106%, reaching nearly $1.05 billion in 2021. This includes significant contributions to California's sales, property, and income tax bases.

State and Local Tax Revenue by Data Year

Figure 3



Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics.

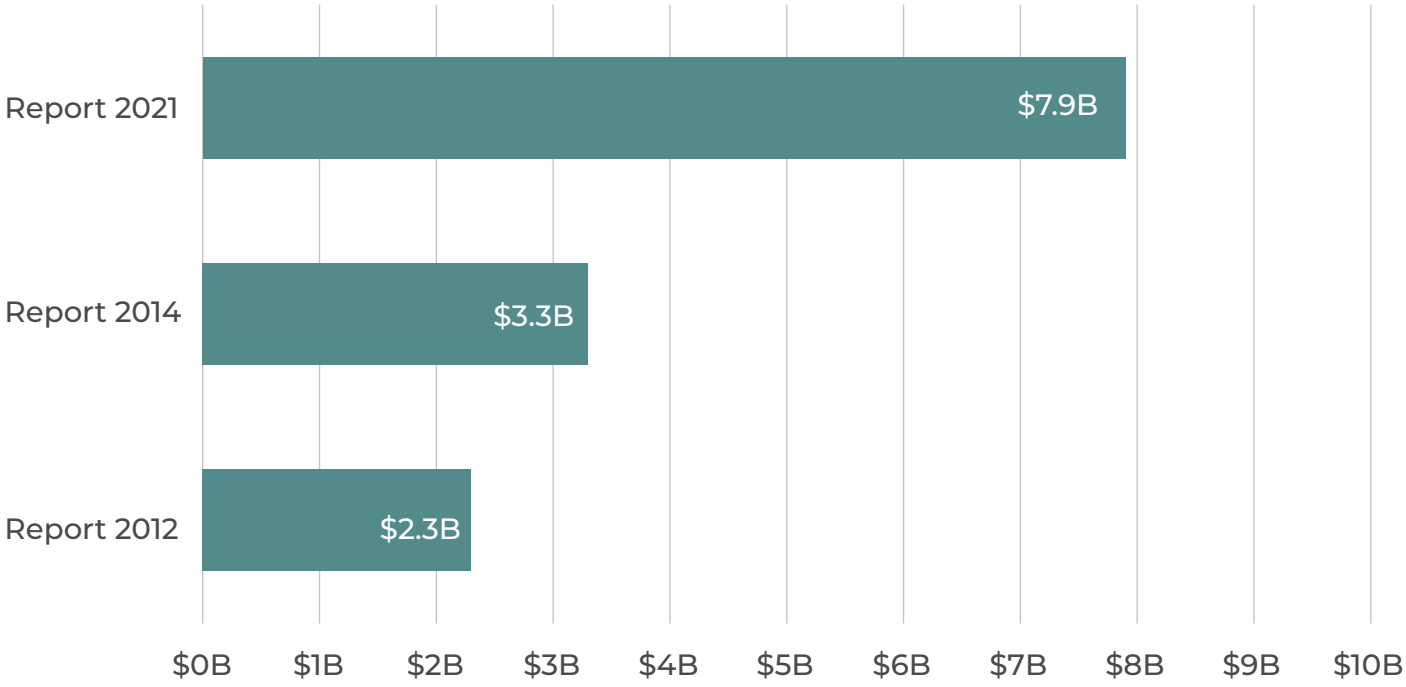
Tribal Non-Gaming

- Tribal non-gaming operations in California—such as providing education, healthcare, and public safety services to the community—generated an estimated $7.9 billion in economic output in 2021.

- Tribal non-gaming operations supported over 27,460 jobs statewide and generated $2.3 billion in labor income for California workers. As direct spending on tribal non-gaming operations circulated through the economy, the indirect and induced impacts amounted to $3.8 billion in economic output and supported 15,952 jobs statewide.

- Between 2012 and 2021, the total economic output generated by tribal non-gaming operations has more than tripled, increasing by approximately 252%. In 2012, the total economic output was $2.3 billion, rising to $3.3 billion in 2014, and to $7.9 billion in 2021.

Total Economic Output by Data Year
Figure 4

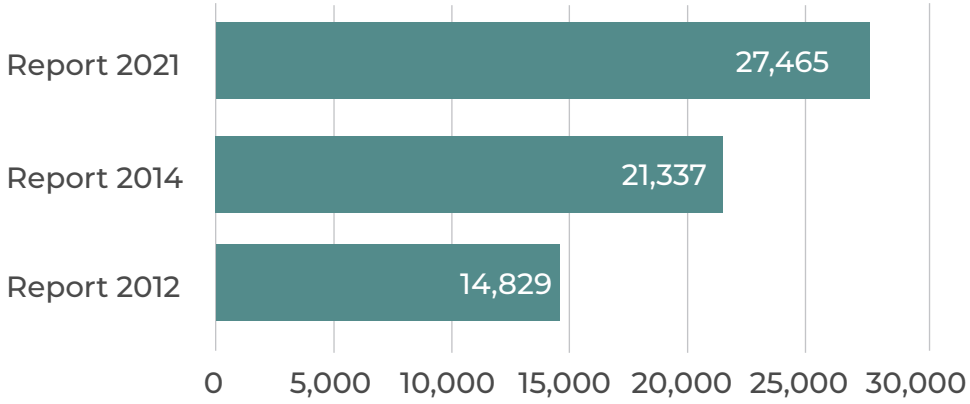


Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics.

- California labor markets benefited from an 85.2% increase in jobs supported by non-gaming tribal operations between 2012 and 2021. In 2012, these operations supported around 15,000 jobs statewide, rising to around 21,300 jobs by 2014 and around 27,500 jobs by 2021.

Total Employment by Data Year

Figure 5



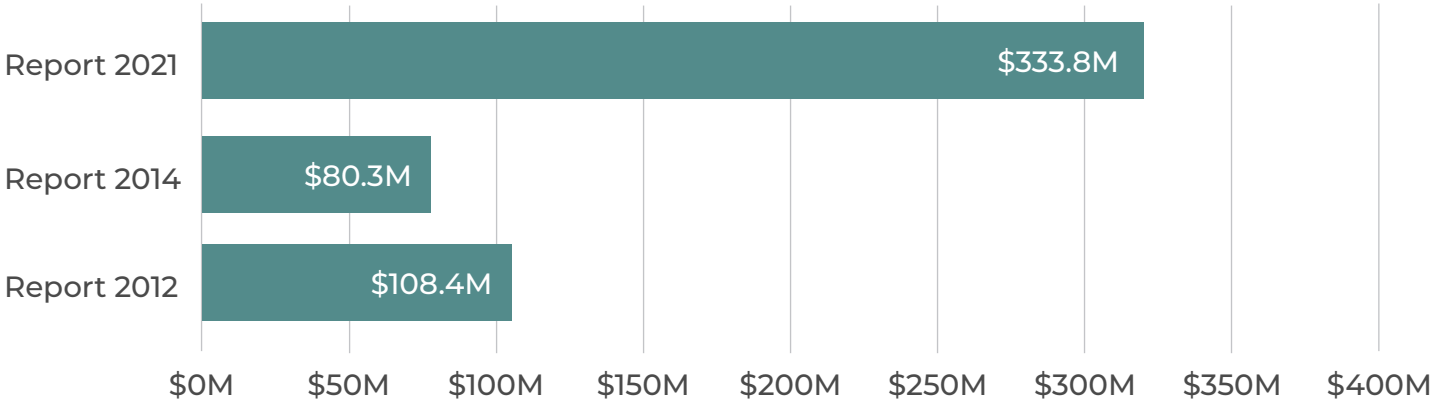
Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics.

- Tribal non-gaming operations play a crucial role in generating tax revenue for California and beyond. In 2021, these operations generated $832.1 million for various levels of government. At the state and local levels, revenue totaled $333.8 million, underscoring the substantial contribution of tribal non-gaming operations to California's annual sales, property, and income tax bases.

- Between 2012 and 2021, state and local tax revenues more than tripled, increasing by 208%. Revenues rose from $108.4 million in 2012, dipped slightly to $80.3 million in 2014, and reached approximately $333.8 million in 2021.

State and Local Tax Revenue by Data Year

Figure 6



Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics.



Social Impacts

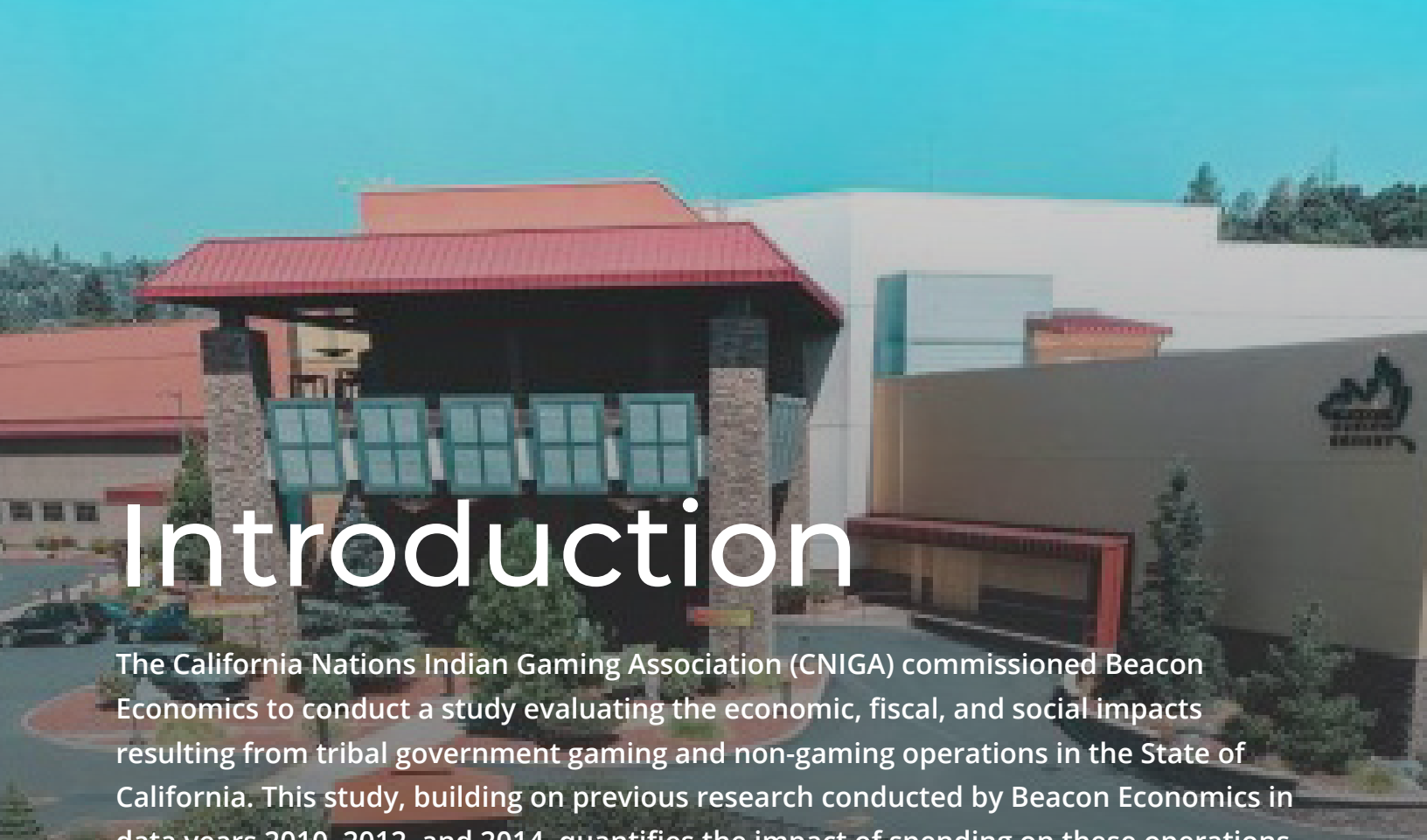
- Revenue-sharing agreements for eligible non-compact, non-gaming, or limited-gaming tribes in 2021 resulted in an estimated $167.8 million in economic output, $57.8 million in labor income, and supported 569 jobs statewide.

- Distributions totaling $79.2 million from the Revenue Sharing Trust Fund (RSTF) in 2021 contributed to an estimated $162.0 million in economic output, $55.8 million in labor income, and supported 550 jobs statewide.

- The $2.8 million in distributions from the Tribal Nation Grant Fund (TNGF) in 2021 generated an estimated $5.7 million in economic output, $2.0 million in labor income, and supported 19 jobs statewide.

- The $77 million in charitable contributions generated nearly $160 million in output, $54.3 million in labor income, and supported 535 jobs.

- Adjusted for inflation, total charitable contributions increased by over 15% from 2014 to 2021.



Introduction

The California Nations Indian Gaming Association (CNIGA) commissioned Beacon Economics to conduct a study evaluating the economic, fiscal, and social impacts resulting from tribal government gaming and non-gaming operations in the State of California. This study, building on previous research conducted by Beacon Economics in data years 2010, 2012, and 2014, quantifies the impact of spending on these operations within California. The assessment analyzes how such spending stimulates economic activity and benefits both gaming and non-gaming tribes, as well as the statewide economy and governmental entities at various levels, including local, state, and federal governments.

Tribal government gaming operations involve a broad range of activities centered on managing and operating gaming facilities. Encompassing more than just traditional casinos, these include related establishments such as hotels, restaurants, and event venues. Non-gaming operations conducted by tribal governments offer essential services to the tribal community. These services include healthcare, law enforcement, infrastructure development, natural resource management, economic development, and cultural preservation.

The findings of this study highlight the substantial impact of tribal government gaming and non-gaming operations on California. These collective efforts sustain tens of thousands of jobs and generate billions of dollars in economic output and labor income. Furthermore, the economic activity associated with these operations contributes tens of millions of dollars in tax receipts to local, state, and federal governments.

This study examines the combined economic, fiscal, and social impacts of California gaming tribes, covering both gaming and non-gaming operations. Using a contribution analysis approach, the study quantifies the economic impact by measuring the direct effects of each dollar spent and how this spending ripples through the economy, influencing output, labor income, and employment. The same analysis is applied to assess fiscal impacts, including tax revenues and other fiscal contributions. Additionally, the study analyzes the social impacts of tribal governments, such as the benefits generated by charitable donations and the distribution of funds from the RSTF and TNGF, which support non-compact, non-gaming, and limited-gaming tribes.

Beacon Economics has conducted three impact studies for CNIGA over the past 10 years, each examining similar expenditure data and estimating the economic, fiscal, and social impacts of the entire tribal government gaming population in California.[2] By comparing the studies from 2012 and 2014 with the current study, it is possible to visualize the growth of tribal government gaming's impact on the California economy.

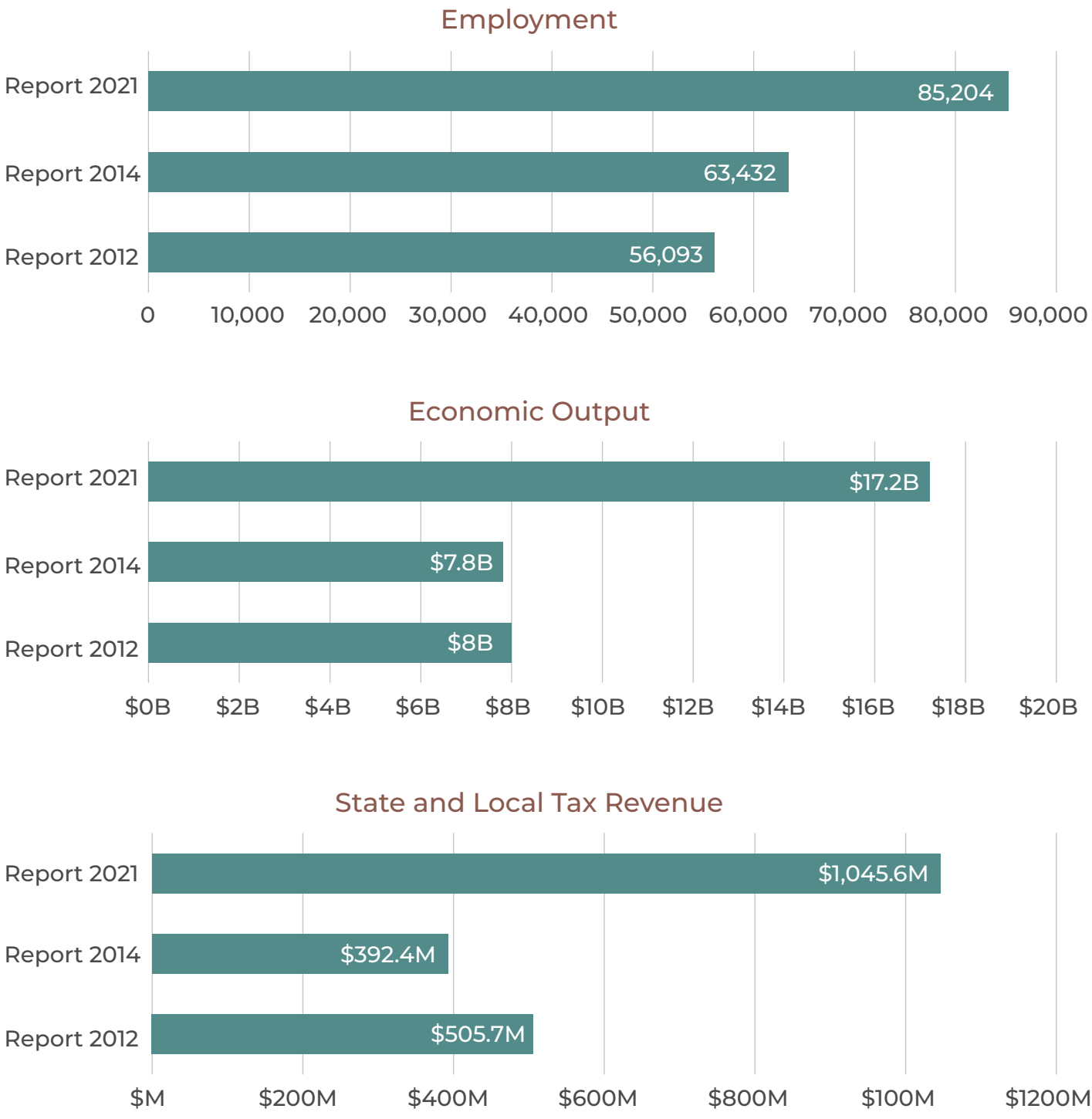
Beacon Economics' two previous impact studies showed that in 2012 and 2014, California's tribal government gaming sector generated billions in economic activity and supported tens of thousands of jobs (over 56,000 in 2012 and over 63,000 in 2014). This study demonstrates that the impact of tribal government gaming in California has grown tremendously in the intervening years.

In 2012, the tribal gaming industry supported over 56,000 jobs and contributed approximately $8.0 billion to California's economic output. By 2014, the industry had grown to support over 63,000 jobs, while its contribution to the state's economic output remained stable at approximately $7.8 billion. In 2021, the industry further expanded to support over 85,000 jobs and contribute approximately $17.2 billion to the state's economic output. The impact of tribal government gaming on labor income for California workers also rose from $2.2 billion in 2012 to $3.3 billion in 2014, and to $5.3 billion in 2021. Finally, state and local tax revenues from tribal gaming rose from $505.7 million in 2012 to over $1 billion in 2021, despite a slight dip to $392.4 million in 2014.

[2] Impacts prior to 2012 were limited to the sampling population only. Impacts from 2012 onwards are estimated for the entire tribal government gaming population of CNIGA. Therefore, comparisons are only made for impacts from 2012 onwards.

Total Gaming Economic and Fiscal Growth Trends, California

Figure 7



Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.

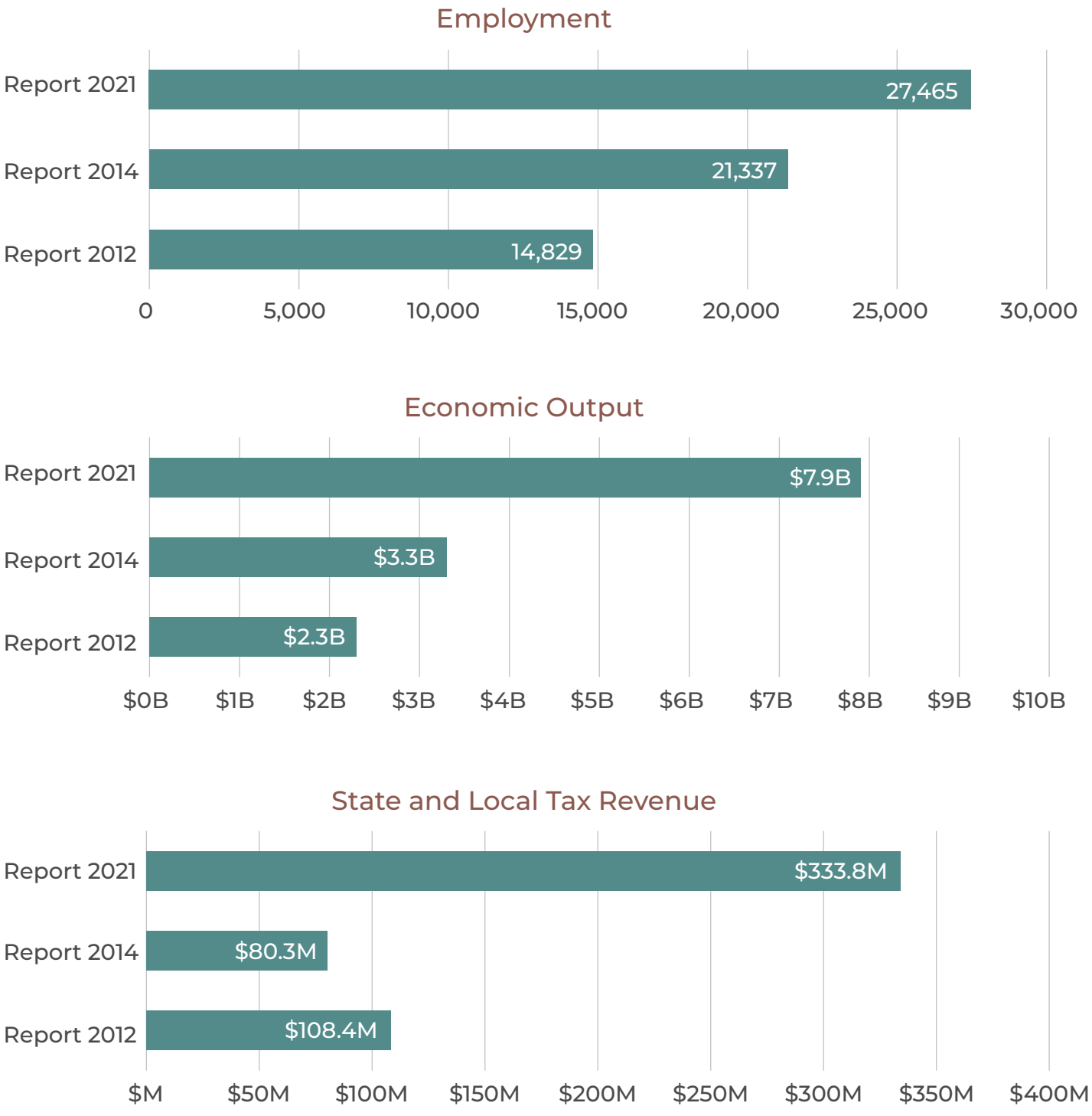


The economic activity driven by tribal non-gaming operations also experienced notable growth. In 2012, these operations supported around 15,000 jobs and generated $2.3 billion in economic output. By 2014, the number of jobs grew to approximately 21,000, with economic output reaching $3.3 billion. In 2021, tribal non-gaming operations supported over 27,000 jobs and generated $7.9 billion in economic activity. Labor income for workers from non-gaming operations increased from approximately $804.6 million in 2012 to around $1.3 billion in 2014, and to around $2.3 billion in 2021. Combined, tribal government gaming and non-gaming operations supported over 112,000 jobs and generated $25.1 billion in economic output in 2021, with $7.6 billion representing labor income for California workers. State and local tax revenues from tribal non-gaming operations also increased, rising from $108.4 million in 2012 to around $333.8 million in 2021, with a slight dip to $80.3 million in 2014.

> **Tribal government gaming and non-gaming operations supported over 112,000 jobs and generated $25.1 billion in economic output in 2021.**

Total Non-Gaming Economic and Fiscal Growth Trends, California

Figure 8



Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.



Methodology

Data Collection

To analyze tribal government gaming and non-gaming operations in California, Beacon Economics conducted a survey of expenditure and employment data from gaming tribes of various sizes across the state. In total, 17 California gaming tribes participated in the survey. This group contained tribes with both large and small casinos in urban and rural areas, offering various amenities such as hotels, restaurants, retail stores, and entertainment venues. The participating tribes are detailed in Table 1.

Tribes Participating in Impact Study
Table 1

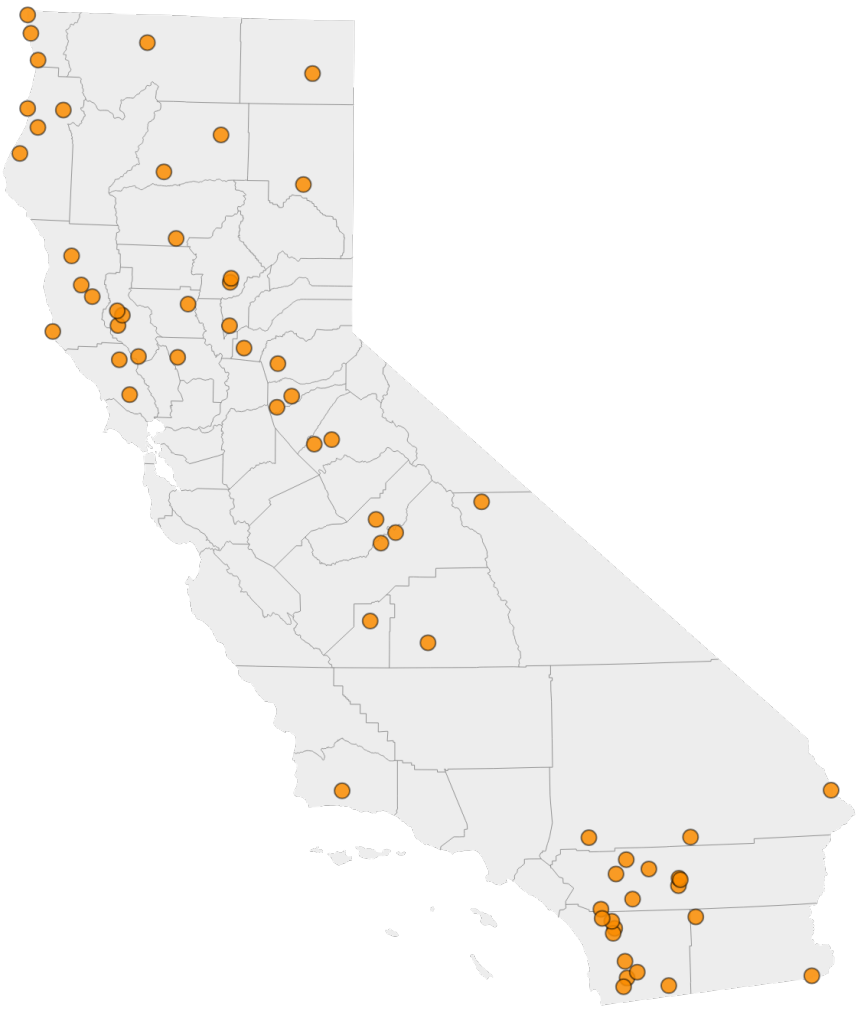
Tribe	Casino	City	County
Augustine Band of Cahuilla Indians	Augustine Casino	Coachella	Riverside
Bishop Paiute Tribe	Wanaaha Casino	Bishop	Inyo
Blue Lake Rancheria	Blue Lake Casino & Hotel	Blue Lake	Humboldt
Cahto Tribe of the Laytonville Rancheria	Red Fox Casino	Laytonville	Mendocino
Cahuilla Band of Indians	Cahuilla Creek Casino	Anza	Riverside
Elk Valley Rancheria	Elk Valley Casino	Crescent City	Del Norte
Enterprise Rancheria of Maidu Indians of California	Hard Rock Hotel & Casino Sacramento	Wheatland	Yuba
Federated Indians of Graton Rancheria	Graton Resort & Casino	Rohnert Park	Sonoma
Rincon Band of Luiseño Indians	Harrah's Resort Southern California	Valley Center	San Diego
Mooretown Rancheria of Maidu Indians	Feather Falls Casino	Oroville	Butte
Morongo Band of Mission Indians	Morongo Casino Resort	Cabazon	Riverside
Pechanga Band of Luiseño Mission Indians	Pechanga Resort & Casino	Temecula	Riverside
Augustine Band of Cahuilla Indians	Augustine Casino	Coachella	Riverside
Bishop Paiute Tribe	Wanaaha Casino	Bishop	Inyo
Blue Lake Rancheria	Blue Lake Casino & Hotel	Blue Lake	Humboldt
Augustine Band of Cahuilla Indians	Augustine Casino	Coachella	Riverside
Bishop Paiute Tribe	Wanaaha Casino	Bishop	Inyo
Blue Lake Rancheria	Blue Lake Casino & Hotel	Blue Lake	Humboldt
Redding Rancheria	Win-River Resort & Casino	Redding	Shasta
San Manuel Band of Mission Indians	Yaamava' Resort & Casino	Highland	San Bernardino
Santa Ynez Band of Chumash Mission Indians	Chumash Casino	Santa Ynez	Santa Barbara
Soboba Band of Luiseño Indians	Soboba Casino	San Jacinto	Riverside
Sycuan Band of the Kumeyaay Nation	Sycuan Casino	El Cajon	San Diego

Source: California Nations Indian Gaming Association. Analysis by Beacon Economics.

The data collected from these tribes was used to estimate the gaming and non-gaming operations expenditures for the remaining 46 non-participating tribal governments. The estimates were based on key shared characteristics, such as casino square footage, number of slot machines, and number of table games. Figure 9 illustrates the location of all 63 members of the tribal government gaming population in California. Additionally, information was available on whether non-participating casinos provided other amenities such as spas, stores, and golf courses. Regression analysis was applied to assess how these characteristics affect tribal government gaming and non-gaming operation expenditures. These estimates formed the basis of the economic and fiscal impact model for tribal government gaming and non-gaming operations.

Location of California's Gaming Tribes

Figure 9



Source: California Nations Indian Gaming Association. Analysis by Beacon Economics.



Input-Output Modeling Overview

To evaluate the economic and fiscal impacts of both gaming and non-gaming operations within tribal government gaming in California, Beacon Economics used an input-output (I-O) economic modeling technique. This type of applied economic analysis tracks the interdependence of various producing and consuming industries in an economy. It measures the relationship between demand for final goods and services and the inputs required to meet that demand. In other words, the model relies on complex buy-sell relationships between industries, households, and government in the economy and illustrates how money spent ripples through the economy.

Beacon Economics used a “contribution analysis” approach, a type of I-O analysis method, to accurately assess the contributions of existing tribal gaming and non-gaming operations. This differs from more traditional impact analyses which examine how changes in key industries affect other regional industries. Contribution analysis explores the impact a sector or multiple sectors have on a regional economy based on their current production levels.

This study categorized economic impacts into three types of effects:

- **Direct effects** are the additional output of goods and/or services resulting from immediate spending from tribe-related expenditures. For instance, payments to employees are direct effects.

- **Indirect effects** are the additional output of goods and/or services generated by business-to-business interaction with suppliers of direct purchases.

- **Induced effects** are the additional output of goods and/or services resulting from increased spending by individuals who receive labor income due to tribe-related expenditures.

The indirect and induced effects are also referred to as "ripple" or "multiplier" effects. When combined, indirect and induced effects are referred to as "secondary" impacts. Initial direct expenditures lead to further secondary spending in the economy. Altogether, direct, indirect, and induced effects add up to the total effect. The following metrics were used to report impacts of the tribe's current operations and capital expenses:

- **Employment** represents the number (headcount) of part-time, full-time, and temporary jobs supported through tribe-related spending across the state.

- **Labor income** represents the value of all employment income generated through gaming and non-gaming operations, including fringe benefits such as health care benefits, retirement contributions, etc.

- **Output** refers to the total value of production generated by gaming and non-gaming operations, including intermediate inputs (goods and services used in other production inputs).

Expenditures

To evaluate the overall economic and fiscal impact of tribal government gaming and non-gaming operations on the State of California, Beacon Economics used expenditure estimates derived from data collected from the survey of CNIGA tribes. This survey covered both operational expenditures (such as payroll and supplies) and capital expenditures (including construction or investment in machinery). After validating the provided expenditure data and constructing a model to predict spending for all 63 members, Beacon Economics used the resulting data to assess the economic activity generated by the tribes.

Table 2 shows a breakdown of the tribe's expenditures by type and category. In 2021, California tribal casinos allocated $6.7 billion for the operations and capital expenditures of their gaming facilities, and $3.1 billion to their non-gaming operations. In total, tribal governments spent approximately $9.8 billion in 2021, which rippled through California's economy.

2021 Operational Expenditures

Table 2

Expenditure Type	Expenditure Category	Amount ($M)
Gaming	Operations	$5,902.7
	Capital	$776.8
Non-Gaming	Operations	$2,796.7
	Capital	$280.9
Total		**$ 9,757.1**

Source: California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.



Economic Impacts

The following section examines how the gaming and non-gaming operations of California's gaming tribes have influenced the state's economy. Beacon Economics evaluates these impacts using an expenditures-based approach, analyzing how spending on these operations stimulates economic activity. This includes consumer purchases, business investments, and job creation across California. The findings show that in 2021, California's gaming tribes had a significant impact on the state economy, supporting over 100,000 jobs and generating billions of dollars in labor income and economic output.



Impacts at a Glance
Table 3

Type	Impact	Employment	Labor Income ($M)	Output ($M)
Gaming	Direct	51,555	$2,570.4	$9,245.0
	Indirect	17,254	$1,559.5	$4,557.8
	Induced	16,395	$1,187.5	$3,364.6
	Total	**85,204**	**$5,317.4**	**$17,167.4**
Non-Gaming	Direct	11,513	$941.9	$4,129.7
	Indirect	8,978	$814.8	$2,382.7
	Induced	6,974	$505.1	$1,431.0
	Total	**27,465**	**$2,261.8**	**$7,943.4**

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.

Economic Impact of Tribal Gaming Operations

Impact of Tribal Gaming Operations on Economic Output

Using the results of the tribal expenditure survey, Beacon Economics estimated that the total gaming operations of California gaming tribes generated $17.2 billion in economic output statewide in 2021.[3] Of this, $9.2 billion[4] represented direct spending by the casinos on goods and services, while $7.9 billion resulted from secondary spending. This secondary spending includes indirect effects (business-to-business transactions upstream in the supply chain), and induced effects, which involve increased consumer spending and business investments driven by higher income from casino expenditures. Specifically, $4.6 billion was attributed to indirect effects, while approximately $3.4 billion came from induced effects.

Impact of Tribal Gaming Operations on Output

Table 4

Impact Type	Output ($M)
Direct	$9,245.0
Indirect	$4,557.8
Induced	$3,364.6
Total	$17,167.4

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.

[3] Impact estimates are listed in 2021 dollars.

[4] Please note that economic output encompasses the sum of various factors, including intermediate inputs, employee compensation, proprietor income, taxes on production, and other property income (OPI). Due to Beacon Economics lacking direct access to specific details required to calculate OPI, such as consumption of fixed capital, corporate profits, net business transfer payments and various forms of income, we relied on IMPLAN (the input-output modeling software used for these analyses) to estimate the value of OPI. The result of this assumption is that direct economic output exceeded the total expenditure of all tribal governments. It's important to highlight that OPI is considered a leakage in economic models, as it doesn't contribute to secondary effects.

Labor income contributed significantly to the statewide economic output of tribal gaming operations, representing 40% of its value. These operations generated an estimated $5.3 billion in income for California workers in 2021. Of this, $2.6 billion was paid directly to casino employees, $1.6 billion was generated indirectly, and $1.2 billion was generated through induced effects.

Impact of Tribal Gaming Operations on Labor Income

Table 5

Impact Type	Output ($M)
Direct	$2,570.4
Indirect	$1,559.5
Induced	$1,187.5
Total	$5,317.4

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.



Spending by the state's gaming tribes to support and maintain their operations created significant secondary economic output in California. Sectors such as Maintenance and Repair of Nonresidential Buildings, Banking and Financial Institutions, Oil Refineries, and others, as shown in Table 6, benefited from the secondary effects generated by these operational expenditures. This demonstrates the economic impacts of tribal gaming on multiple areas of the state's economy.

Top 10 Secondary Output Impacts by Industry

Table 6

Industry	Secondary Output ($M)	Percent of Total Secondary Impact
Maintenance and Repair of Nonresidential Buildings	$753.8	9.5%
Owner-Occupied Dwellings	$353.0	4.5%
Other Real Estate Holdings	$301.4	3.8%
Banking and Financial Institutions	$273.4	3.5%
Insurance Companies and Agents	$257.1	3.2%
Online Media and Search Engines	$256.6	3.2%
Oil Refineries	$242.2	3.1%
Insurance Providers	$189.9	2.4%
Other Financial Investment Firms	$165.7	2.1%
Staffing and Employment Agencies	$157.5	2.0%

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.

Impact of Tribal Gaming Operations on Employment

In 2021, California's tribal gaming operations supported approximately 85,200 jobs statewide. Of these, around 51,600 were directly tied to gaming facilities, with around 17,300 positions stemming from indirect effects and 16,400 from induced effects, totaling 33,700 jobs. These secondary effects encompass jobs supported throughout the supply chain and those sustained by household spending, extending into a wide range of industries. As shown in Table 8, Maintenance and Repair of Nonresidential Buildings saw the largest benefit in secondary employment, supporting 2,756 jobs across the California economy. As these large facilities regularly require maintenance and upgrades, they generate consistent demand for building maintenance and repair services. Full-service restaurants and limited-service restaurants also benefitted substantially, supporting a combined total of 2,208 jobs. Staffing and employment agencies, which employed temporary workers, supported 1,253 jobs. Home Improvement Retail Stores (968 jobs) and insurance companies and agents (825 jobs) also experienced notable benefits from the gaming operations of California's gaming tribes.

California's gaming industry— led primarily by tribal gaming operations—plays a significant role in advancing the state's economy by supporting tens of thousands of job opportunities. In 2021, tribal gaming operations directly generated 51,600 jobs, surpassing the 51,300 jobs provided by California's special food services industry, which includes food service contractors, caterers, and mobile food services.[5] Additionally, the number of jobs directly supported by California's tribal gaming operations exceeded those provided by the sporting goods, hobby, and musical instrument retailers industry, which was estimated at 50,800 jobs in 2021. This sector comprises establishments primarily engaged in retailing new sporting goods, toys, games, hobby supplies, sewing supplies, needlework accessories, and musical instruments. [6]

[5] California Employment Development Department, "Industry Employment – Official Estimates, 2021"
[6] Id.

Impact of Tribal Gaming Operations on Employment

Table 7

Impact Type	Jobs
Direct	51,555
Indirect	17,254
Induced	16,395
Total	**85,204**

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics.

Top 10 Secondary Employment Impacts by Industry

Table 8

Industry	Secondary Output ($M)	Percent of Total Secondary Impact
Maintenance and Repair of Nonresidential Buildings	2,756	8.2%
Staffing and Employment Agencies	1,253	3.7%
Limited-Service Restaurants	1,233	3.7%
Full-Service Restaurants	975	2.9%
Home Improvement Retail Stores	968	2.9%
Insurance Companies and Agents	825	2.5%
Design and Engineering Services	810	2.4%
Insurance Providers	765	2.3%
Tourist Transportation and Support Services	732	2.2%
Social Services for Individuals and Families	715	2.1%

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics.

Economic Impact of Tribal Non-Gaming Operations

Impact of Tribal Non-Gaming Operations on Economic Output

In 2021, the non-gaming operations of California's gaming tribes generated $7.9 billion in economic output in the state. This included $4.1 billion directly from tribal government expenditures, $2.4 billion from indirect effects stemming from suppliers to tribal governments, and $1.4 billion from induced effects. The economic output from non-gaming-related expenditures had ripple effects across various industries throughout California. The Non-Residential Maintenance and Repair Construction sector emerged as the largest beneficiary, as shown in Table 10, generating $377.6 million in secondary economic activity, representing 9.9% of the total secondary effects. In comparison, the Non-Residential Real Estate sector received $150.7 million, accounting for 4.0%. Insurance Companies and Agents also benefited significantly, amassing $150.2 million, fueled by tribal governments providing health insurance for their members, thus fostering statewide demand for insurance services.

Impact of Tribal Non-Gaming Operations on Output

Table 9

Impact Type	Output ($M)
Direct	$4,129.7
Indirect	$2,382.7
Induced	$1,431.0
Total	$7,943.4

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.

Top 10 Secondary Output Impacts by Industry

Table 10

Industry	Secondary Output ($M)	Percent of Total Secondary Impact
Maintenance and Repair of Nonresidential Buildings	$377.6	9.9%
Other Real Estate Holdings	$150.7	4.0%
Insurance Companies and Agents	$150.3	3.9%
Owner-Occupied Dwellings	$150.2	3.9%
Banking and Financial Institutions	$147.0	3.9%
Oil Refineries	$132.7	3.5%
Online Media and Search Engines	$116.5	3.1%
Insurance Providers	$93.4	2.4%
Design and Engineering Services	$81.9	2.1%
Staffing and Employment Agencies	$76.8	2.0%

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.

Of the $7.9 billion in statewide economic output generated by expenditures supporting the non-gaming operations of California's gaming tribes, $2.3 billion constituted income for state workers, representing 29% of its total value. Of this, $941.9 million was paid directly to tribal government employees. As California's gaming tribes spend money on tribal government-related activities or social services, that money circulates through various non-tribal-related industries, thereby influencing the state's economy through secondary effects. In total, secondary effects totaled $1.3 billion, with $814.8 million generated indirectly and $505.1 million generated through induced effects. As California's gaming tribes generate over a billion dollars in secondary labor income, this highlights the significant secondary impacts of tribal non-gaming operations, extending well beyond the tribes themselves.

Impact of Tribal Non-Gaming Operations on Labor Income
Table 11

Impact Type	Output ($M)
Direct	$941.9
Indirect	$814.8
Induced	$505.1
Total	$2,261.8

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.

Impact of Tribal Non-Gaming Operations on Employment

The economic output generated by the non-gaming operations of California's gaming tribes supported 27,500 jobs across the state in 2021. Of this, an estimated 11,500 workers were directly employed by the tribes, while the remaining 16,000 were supported through secondary effects, including approximately 9,000 jobs through indirect effects and nearly 7,000 jobs through induced effects.

Impact of Tribal Non-Gaming Operations on Employment
Table 12

Impact Type	Output ($M)
Direct	11,513
Indirect	8,978
Induced	6,974
Total	27,465

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics.

The estimated 11,500 jobs directly supported by the non-gaming operations of California gaming tribes in 2021 exceeded the direct employment estimates of the Other Heavy and Civil Engineering Construction industry, which supported 11,400 jobs in 2021. This industry involves heavy and civil engineering construction projects, excluding highways, streets, bridges, and distribution lines, encompassing new construction, reconstruction, rehabilitation, and repairs.[7] Additionally, in terms of direct employment, tribal non-gaming operations in 2021 surpassed the Performing Arts Companies industry, which supported an estimated 11,000 jobs in 2021. This industry group primarily involves producing live presentations featuring actors, singers, dancers, musical groups, artists, and other performers.[8]

Employment from tribal non-gaming operations plays a vital role by providing emergency, health, and education services to both tribal members and non-members. Direct tribal non-gaming employment creates secondary effects that encompass jobs supported throughout the supply chain of such services and those sustained by household spending, thus extending into a wide range of industries. However, while tribal non-gaming operations support fewer workers than gaming operations, the secondary employment effects are still significant. Maintenance and Repair of Nonresidential Buildings experienced the largest benefit in terms of secondary employment as shown by table 13, supporting 1,380 jobs throughout the California economy.

> **Employment from tribal non-gaming operations plays a vital role by providing emergency, health, and education services to both tribal members and non-members.**

[7] California Employment Development Department, "Industry Employment – Official Estimates, 2021"
[8] Id.

Top 10 Secondary Employment Impacts by Industry

Table 13

Industry	Secondary Output ($M)	Percent of Total Secondary Impact
Maintenance and Repair of Nonresidential Buildings	1,380	8.7%
Other Real Estate Holdings	616	3.9%
Staffing and Employment Agencies	611	3.8%
Insurance Companies and Agents	474	3.0%
Full-Service Restaurants	440	2.8%
Design and Engineering Services	431	2.7%
Limited-Service Restaurants	422	2.6%
Tourist Transportation and Support Services	402	2.5%
Home Improvement Retail Stores	362	2.3%
Banking and Financial Institutions	323	2.0%

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.



Fiscal Impacts

The substantial economic impacts of the gaming and non-gaming operations of California's gaming tribes have a significant effect on local, state, and federal tax revenues. The total fiscal impact includes various local taxes such as sales, property, income, excise, payroll, and utility taxes, among others. Tribal government gaming and non-gaming operations have generated substantial tax revenue at the local, state, and federal levels, emphasizing their impact within and beyond state borders.

Tribal Gaming's Impact on State, Local, and Federal Tax Revenues

In 2021, the gaming operations of California's gaming tribes generated an estimated $2.2 billion in tax revenue. Of this, state and local governments collected $1.1 billion, while the federal government received $1.1 billion. For state and local taxes, which are often redirected towards local social programs and infrastructure, the largest sources of revenues are sales tax ($318.1 million), property tax ($308.0 million), and income tax ($224.4 million). Sales tax plays an important role in local fiscal revenues due to business purchases and transactions, and households spending on local goods and services.

Although tribal gaming establishments have a unique tax status, their significant direct and indirect tax contributions provide substantial revenue to state and local governments.

Total Fiscal Impact of Tribal Gaming Operations (California)

Table 14

Tax Type	State and Local ($M)	Federal ($M)	Total ($M)
Sales Tax	$318.1	$0.0	$318.1
Property Tax	$308.0	$0.0	$308.0
Income Tax	$224.4	$558.6	$783.0
Social Insurance Tax	$27.3	$545.9	$573.2
Corporate Profits Tax	$89.5	$140.3	$229.8
Other	$78.3	($134.6)[9]	($56.2)
Total	**$1,045.6 million**	**$1,110.3 million**	**$2,155.9 million**

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.

[9] Negative tax numbers represent an industry receiving more subsidies than it pays out in specific taxes for a given year.

Out of the estimated $2.2 billion in tax revenue, $1.1 billion came from secondary effects—indirect and induced impacts. Of this, $552.1 million went to state and local governments, while $544.4 million went to the federal government. Secondary effects from sales taxes contributed $175.0 million to state and local revenue, while income taxes led to $293.3 million in federal revenue. Property and social insurance taxes also made significant contributions, adding $169.4 million to state and local funds and $271.0 million to federal coffers. These secondary fiscal impacts highlight just how far the benefits of tribal gaming operations extend beyond their immediate environment, affecting a wide range of industries and services.

Secondary Fiscal Impact of Tribal Gaming Operations (California)

Table 15

Tax Type	State and Local ($M)	Federal ($M)	Total ($M)
Sales Tax	$175.0	$0.0	$175.0
Property Tax	$169.4	$0.0	$169.4
Income Tax	$117.2	$293.3	$410.5
Social Insurance Tax	$13.2	$271.0	$284.2
Corporate Profits Tax	$34.5	$54.1	$88.6
Other	$42.9	($74.0)	($31.1)
Total	**$552.1 million**	**$544.4 million**	**$1,096.5 million**

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.

Tribal Non-Gaming's Impact on State, Local, and Federal Tax Revenues

The non-gaming operations of California's gaming tribes collectively generated around $832.1 million in tax revenue in 2021. Of this, state and local governments collected $333.8 million, and the federal government received $498.2 million. Income taxes were the primary contributors, generating $95.6 million in state and local revenue, and $238.2 million in federal revenues. Sales taxes also played a significant role in state and local tax revenues providing an additional $83.1 million. Social insurance taxes were similarly significant, contributing $230.8 million to federal tax revenues.

Total Fiscal Impact of Tribal Non-Gaming Operations (California)

Table 16

Tax Type	State and Local ($M)	Federal ($M)	Total ($M)
Sales Tax	$83.1	$0.0	$83.1
Property Tax	$81.1	$0.0	$81.1
Income Tax	$95.6	$238.2	$333.8
Social Insurance Tax	$11.5	$230.8	$242.3
Corporate Profits Tax	$41.0	$64.4	$105.4
Other	$21.4	($35.2)	($13.7)
Total	**$333.8 million**	**$498.2 million**	**$832.1 million**

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.

The non-gaming operations of California's gaming tribes play a vital role in supporting local communities by directly investing in essential social services. Moreover, the $333.8 million in state and local tax revenue generated through the economic effects of non-gaming spending contributes to essential state and municipal services that benefit all California residents.

Out of the estimated $832.1 million in tax revenue generated by the non-gaming operations of California's gaming tribes, $523.9 million came from secondary effects—indirect and induced impacts. Focusing on secondary effects, state and local governments collected $262.3 million, while the federal government received $261.5 million. Sales taxes were again the main contributor to state and local taxes, totaling $82.9 million, while income taxes generated the most federal revenue at $141.0 million. Property taxes also contributed significantly to state and local revenues, totaling $80.2 million. Social insurance taxes contributed $130.1 million to federal coffers. These secondary fiscal effects reveal the interconnectedness of non-gaming operations of California's gaming tribes with businesses and services, emphasizing fiscal benefits far beyond their core activities. This echoes the pattern seen in gaming operations, highlighting the broader economic contributions of non-gaming tribal activities, which involve tribal governments delivering essential services to their community.

Secondary Fiscal Impact of Tribal Non-Gaming Operations (California)

Table 17

Tax Type	State and Local ($M)	Federal ($M)	Total ($M)
Sales Tax	$82.9	$0.0	$82.9
Property Tax	$80.2	$0.0	$80.2
Income Tax	$56.3	$141.0	$197.3
Social Insurance Tax	$6.3	$130.1	$136.4
Corporate Profits Tax	$16.3	$25.5	$41.8
Other	$20.3	($35.1)	($14.7)
Total	**$262.3 million**	**$261.5 million**	**$523.9 million**

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.



Social Impacts

Impact of Tribal Revenue Sharing Distributions

Revenue Sharing Trust Fund Historical Overview: Evolution and Impact for California Tribes

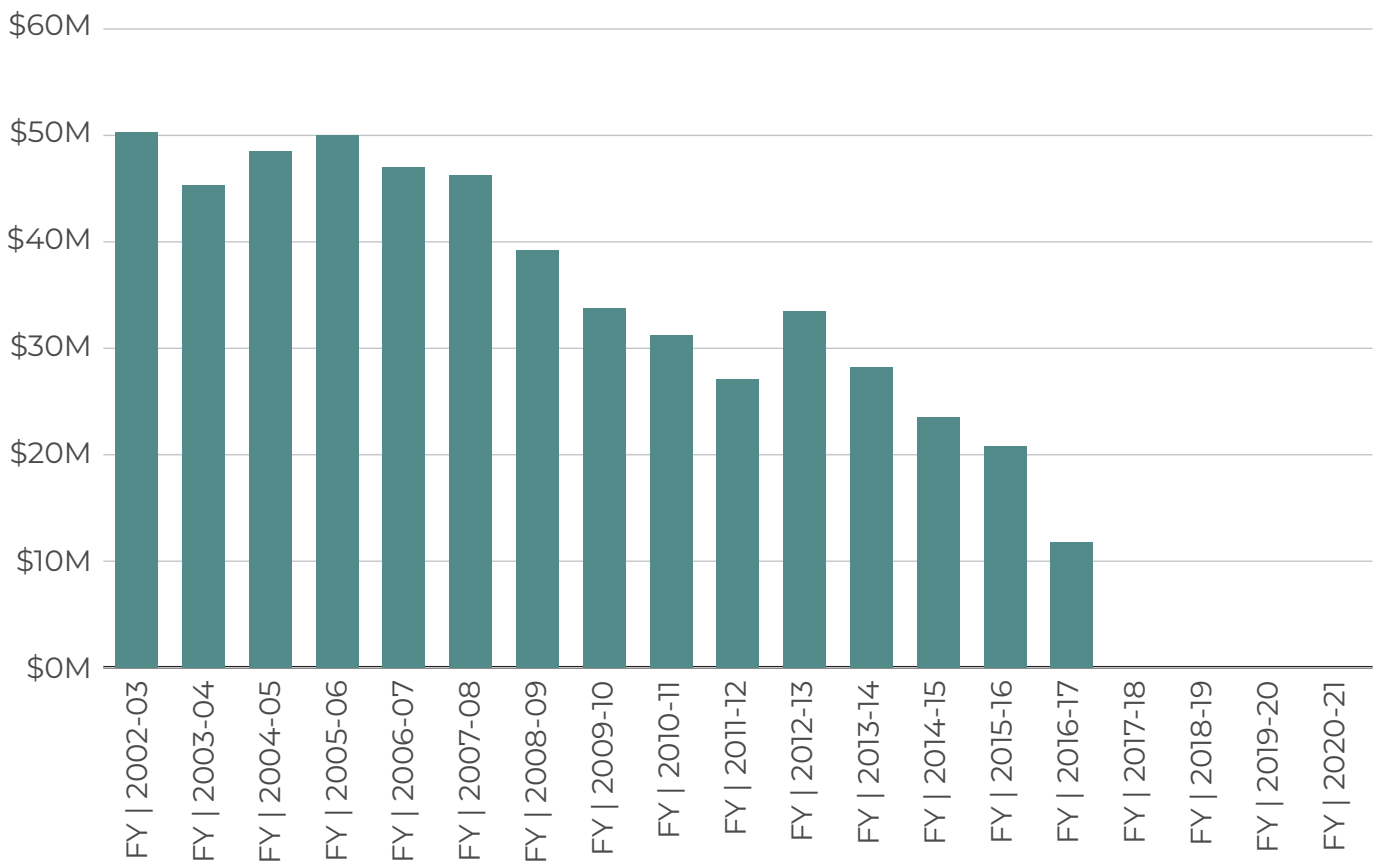
The Revenue Sharing Trust Fund, established through Tribal-State Gaming Compacts (Compacts) signed from 1999 onwards, has been instrumental in enhancing economic prosperity among disadvantaged tribes in California. The RSTF is funded by payments from gaming tribes pursuant to their Compacts and used to make distributions to eligible recipient tribes, including non-compact tribes or non-gaming and limited-gaming tribes. The California Gambling Control Commission (CGCC), the trustee of the fund, makes distributions to eligible recipient tribes of $275,000 quarterly or $1.1 million annually per tribe. RSTF distributions to tribes began in financial year 2000-01 and have totaled nearly $1.6 billion as of financial year 2020-21. These distributions have empowered tribal governments to achieve objectives and enhance critical initiatives in education, infrastructure, and emergency services. This support promotes self-governance and economic development, positively impacting all of California

However, the significance of the RSTF extends beyond its distributions. Following the 2012 Tribal-State Gaming Compact with the Federated Indians of Graton Rancheria, subsequent Compacts now include a provision directing the state to transfer excess RSTF revenue to the Tribal Nations Grant Fund (TNGF). These excess funds are then distributed to eligible tribes via a grant process, allowing for larger grants that further support the goals established by the RSTF.

In its infancy, the RSTF faced financial challenges, relying on annual transfers from the Indian Gaming Special Distribution Fund (SDF), a tribally financed fund created in 1999, to remain solvent. Although tribes fulfilled their Compact obligations to make RSTF payments, the distributions required under the Compacts to eligible tribes exceeded RSTF revenues. However, recent reforms have stabilized the RSTF, enabling it to fully support the $1.1 million distributions to eligible tribes, along with additional funding for the TNGF.

RSTF Shortfalls (Funds Transferred from SDF to RSTF)

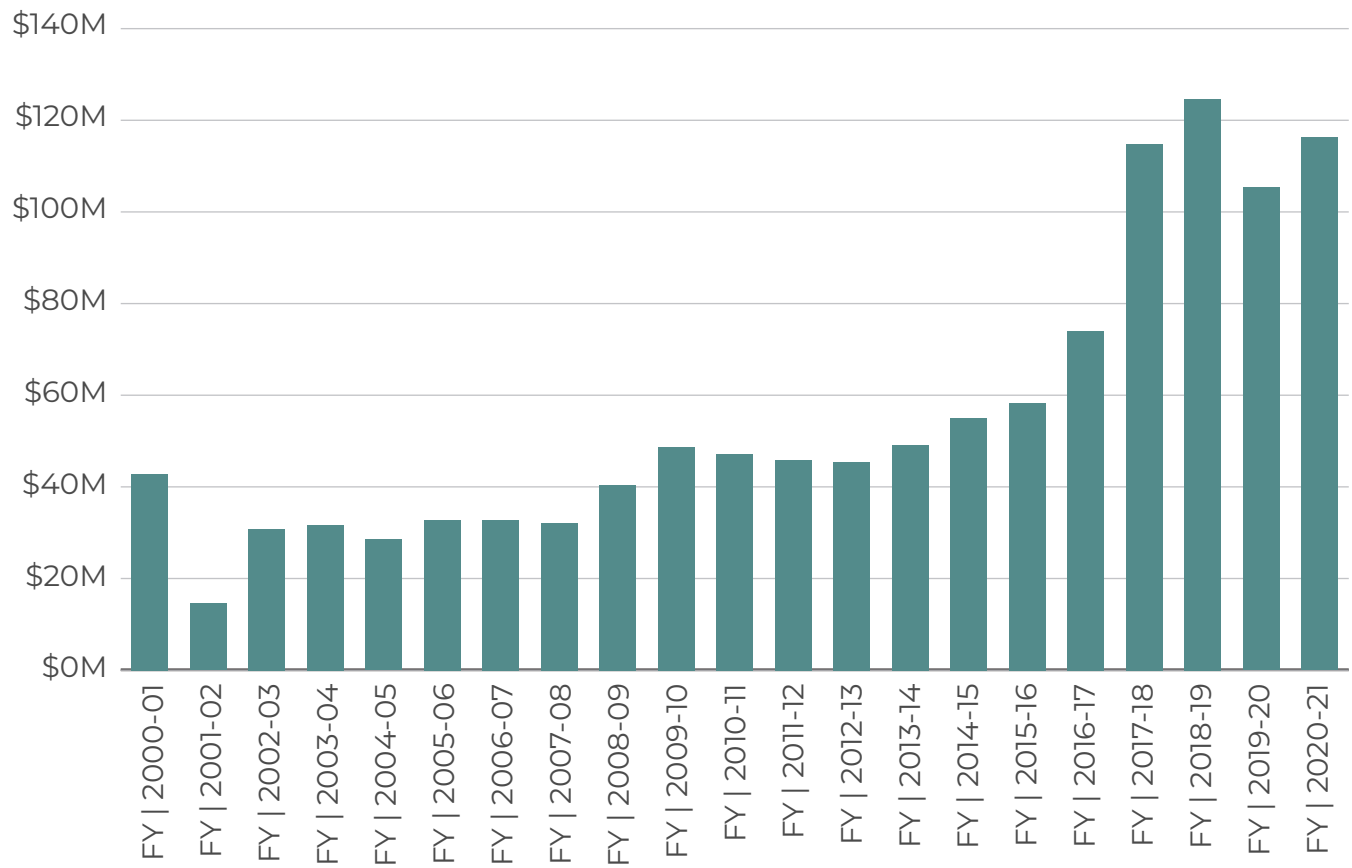
Figure 10



Source: California Gambling Control Commission. Analysis by Beacon Economics.
*In FY 2000-01 and FY 2001-02 (the first two fiscal years that the fund was established) the RSTF was insufficient to make the maximum distributions to eligible tribes pursuant to the Compacts. However, a mechanism did not exist in State law to identify or fund RSTF shortfalls.

RSTF Revenues (Compact Payments Made to the RSTF)

Figure 11



Source: California Gambling Control Commission. Analysis by Beacon Economics.

As shown in Figure 10, the RSTF reached full solvency for the first time in financial year 2017-18, largely due to the renegotiation of compacts. These compacts increased the annual RSTF payments made by the tribes, as shown in Figure 11, which in turn stabilized the fund. Consequently, transfers from the SDF to the RSTF were no longer necessary, as RSTF revenues surpassed the amounts needed for distributions to eligible tribes. Moreover, RSTF revenues continue to significantly exceed the required amounts for distributions, allowing ample funding for the TNGF. AB 880 (Gray), Statutes of 2018, established a framework to implement the TNGF grant program and distribute grants, effective January 1, 2019. In financial year 2019-20 and financial year 2020-21, surplus RSTF revenues amounting to $73 million were transferred to the TNGF, of which approximately $43.3 million was distributed to eligible tribes during the same period.



Impact of RSTF Distributions and TNGF Grant Awards

CGCC data on RSTF distributions and TNGF grant awards from 2021 were used to assess the economic impacts of these funds. In 2021, $79.2 million from the RSTF and $2.8 million from the TNGF were distributed to eligible tribes in California.

The direct impact of the $79.2 million in RSTF distributions—assuming all funds were spent by eligible tribes in 2021—supported 198 jobs and $26.9 million in earnings for California workers. Combining secondary economic output totaling $82.9 million, the total economic output of 2021 RSTF distributions reached $162.1 million. This supported an estimated 550 jobs with a total labor income of $55.8 million in California.

Economic Impact of RSTF Disbursements, 2021

Table 18

Impact Type	Employment	Labor Income ($M)	Output ($M)
Direct	198	$26.9	$79.2
Indirect	180	$16.4	$47.6
Induced	172	$12.5	$35.3
Total	**550 jobs**	**$55.8 million**	**$162.1 million**

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.

Broadening the analysis to include the 2021 TNGF grant awards reveals even more substantial economic impacts stemming from the revenue-sharing agreements. These distributions and grants resulted in approximately $5.7 million in additional economic output within the state. Moreover, expenditure associated with TNGF grants supported an additional 19 jobs and contributed $2.0 million in labor income to the statewide economy (see Table 19). Overall, as Table 20 shows, the combined effects of RSTF and TNGF distributions and awards are estimated to have generated $167.8 million in economic output.

Economic Impact of TNGF Disbursements, 2021
Table 19

Impact Type	Employment	Labor Income ($M)	Output ($M)
Direct	7	$1.0	$2.8
Indirect	6	$0.6	$1.7
Induced	6	$0.4	$1.2
Total	**19 jobs**	**$2.0 million**	**$5.7 million**

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.

Total Economic Impact of Revenue Sharing, 2021
Table 20

Impact Type	Employment	Labor Income ($M)	Output ($M)
Direct	205	$27.9	$82.0
Indirect	186	$17.0	$49.2
Induced	178	$12.9	$36.6
Total	**569 jobs**	**$57.8 million**	**$167.8 million**

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.



Impact of Charitable Contributions

Philanthropy is an ingrained priority for tribal governments. Beacon Economics estimates that California's gaming tribes contributed over $77 million to charities, community organizations, and community members throughout 2021. Tribal governments continue to partner with local and national organizations that provide essential goods and services to communities. These charitable contributions impact a broad range of programs encompassing education, health care, public safety services, and social services, to name a few. Moreover, California's gaming tribes provide a significant amount of charity in-kind[10] which is vital for community development and well-being. These contributions provide essential resources and services, address immediate needs, and boost local economies. They also help preserve cultural heritage and foster cooperation between tribal and non-tribal communities, which promotes positive social change.

Charitable donations from tribal governments boost local and state output, employment, and wages. These contributions have an even greater impact when factoring in the direct, indirect and induced effects. For example, a donation to a health center for new medical equipment not only covers the cost of the equipment (direct impacts) but also triggers benefits through upstream supply chain transactions and spending by employees at the medical equipment supplier (secondary impacts).

[10] Charity in-kind refers to donations of goods and services instead of money, such as food, clothing, medical supplies, equipment, or volunteer time and expertise. These donations provide direct, practical support to recipients.

The $77 million in charitable contributions spent by tribal governments ripples through the California economy, resulting in a $46.3 million indirect effect and a $34.3 million induced effect. The economic output generated by charitable contributions supported 535 jobs and resulted in $54.3 million in labor income.

Total Economic Impact of Charitable Contributions, 2021

Table 21

Impact Type	Employment	Labor Income ($M)	Output ($M)
Direct	193	$26.2	$77.0
Indirect	175	$16.0	$46.3
Induced	167	$12.1	$34.3
Total	**535 jobs**	**$54.3 million**	**$157.6 million**

Source: IMPLAN, California Nations Indian Gaming Association. Analysis by Beacon Economics. Real 2021 dollars.

Some noteworthy charitable contributions include:

- The Morongo Band of Mission Indians provided a major donation of $5.6 Million to the San Gorgonio Memorial Hospital Foundation, the largest donation ever received by the foundation. This donation will be used to buy CT scanners and an MRI machine, allowing the hospital to expand its stroke program, home to the only certified stroke center in the region. This is a significant contribution to the local community as stroke patients currently have to travel outside the region to receive this care. Various other grants from Morongo helped causes such as guide dogs for the blind, resources for sober living and addiction recovery, and reducing food insecurity.

- The Federated Indians of Graton Rancheria provided over $9 million to various charities and causes, including $100,000 to the San Francisco Gay Men's Chorus and $40,000 to Sonoma County Pride, supporting efforts to build a more inclusive society.

Many vulnerable people benefitted from Graton's charitable contributions to organizations such as Meals on Wheels, the Committee on the Shelterless, and Redwood Food Bank, which combined received over $100,000 in donations.

- The San Manuel Band of Mission Indians donated over $22 million to charities and organizations, including $8.4 million to educational causes. Notable contributions include $1.8 million for the Crafton Hills College Fire Academy and $735,000 in scholarships for dependents of team members. Additionally, the tribe contributed over $3.5 million to health services, with $450,000 supporting an interactive musical playground for children with physical and neurological disorders.

- The Sycuan Band of the Kumeyaay Nation donated nearly $3.5 million in 2021, with significant contributions supporting youth services. Over $80,000 went to organizations such as Big Brothers and Sisters of San Diego County, Ronald McDonald House San Diego, and the San Diego Center for Children. In total, the Sycuan Band made a broad impact in the San Diego community, donating to over 115 organizations.

These charitable contributions amply demonstrate the far-reaching effects that tribal governments have on tribal members, on their local community, and on the state overall. The direct impact of these donations improves education, health services, public safety, and other important causes. Philanthropy remains central to tribal operations, with charitable contributions increasing by 15% from 2014 to 2021.

> **California's gaming tribes contributed over $77 million to charities, community organizations, and community members throughout 2021. These charitable contributions impact a broad range of programs encompassing education, health care, public safety services, and social services.**



Conclusion

In 2021, California's gaming tribes made significant economic, fiscal, and social contributions to the state. Their gaming and non-gaming operations supported over 112,500 jobs and generated $25.1 billion in economic output, including $7.6 billion in labor income for state workers. Gaming operations alone accounted for $17.2 billion in output, supporting 85,000 jobs and contributing $5.3 billion in labor income. Non-gaming operations, which include vital services such as education, healthcare, and public safety, added $7.9 billion in output, $2.3 billion in labor income, and supported over 27,000 jobs statewide.

Over the last 10 years, the three economic impact analyses delivered to CNIGA by Beacon Economics have shown consistent growth in economic output, labor income, and employment, driven by tribal operations. This trend underscores the tremendous and ongoing importance of gaming tribes to the California economy.

In fiscal terms, California gaming tribes generated over $3.0 billion to fed
eral, state and local governments. Gaming operations alone generated a total of $2.2 billion in federal, state and local tax revenues, while non-gaming operations contributed $832.1 million, supporting public services and infrastructure across the state.

In addition to the economic and fiscal impacts, gaming tribes had significant social impacts through the RSTF and TNGF revenue-sharing agreements. In 2021, $81 million was distributed to economically disadvantaged tribes across California, which generated an estimated $167.8 million in economic output, $57.8 million in labor income, and supported approximately 569 jobs.

Charitable contributions from California gaming tribes greatly supported local communities, with $77 million donated in 2021 These donations benefitted causes such as education, health services, and public safety, resulting in $157.6 million in output, 535 jobs, and $54.3 million in labor income.

Overall, the economic, fiscal, and social impacts detailed in this analysis make it clear that tribal gaming and non-gaming operations continue to positively influence the quality of life in California and the local communities where gaming tribes are located.

Appendix

Economic Impact Terms

Table 22

Term	Definition
Direct Effect	The output of goods or services resulting from immediate spending. These expenditures occur in a variety of categories, including construction equipment, intermediate inputs like lumber or concrete, labor, engineering and design services, and transportation.
Indirect Effect	The additional output of goods or services generated by supply chain interactions. For example, when a construction worker spends money on groceries, the grocery store will go to a wholesaler and purchase additional goods, thereby generating an indirect impact.
Induced Effect	The additional output of goods or services generated by households spending their income.
Secondary Effect	Sum of indirect and induced effects.
Total Impact	The sum of the direct, indirect, and induced effects.
Employment	The number of jobs supported through spending.
Labor Income	The value of all forms of employment income paid for all types of impacts, including health benefits, bonuses, etc.
Output	The total value of production generated through project spending, including the value of intermediate inputs—goods and services used in the production of equipment, raw materials, energy, and other production inputs.

Tribal Terms

Table 23

Term	Definition
Tribal Gaming	Includes tribal-owned gaming facilities and all ancillary businesses or services, such as hotels, restaurants, golf courses, entertainment venues, retail shops, etc.
Tribal Non-Gaming	Encompasses tribal government activities such as healthcare, law enforcement, education, infrastructure development, and other essential public services.
Compact Tribe	A federally recognized tribe in California with a Class III gaming Compact in accordance with the Indian Gaming Regulatory Act of 1988 (18 U.S.C. Sec. 1166 to 1168, incl., and 25 U.S.C. Sec. 2701 et seq.) entered into with the State of California and ratified by the Legislature.
Non-Compact Tribe	A federally recognized tribe in California that is operating fewer than 350 gaming devices.
Non-Gaming Tribe	A federally recognized tribe in California with or without a Class III gaming Compact that has not engaged in, or offered, Class II or Class III gaming in any location within or outside of California, as of the date of distribution to such tribe from the RSTF or the TNGF, or during the immediately preceding 365 days.
Limited-Gaming Tribe	A federally recognized tribe in California that has a Class III gaming Compact with the state but is operating fewer than a combined total of 350 gaming devices in all of its gaming operations wherever located or does not have a Class III gaming Compact but is engaged in Class II gaming, within or without California, during the immediately preceding 365 days.
Revenue Sharing Trust Fund	A state fund for the receipt and deposit of monies received by the state from Indian tribes pursuant to the terms of tribal-state gaming compacts for the purpose of making distributions to eligible recipient Indian tribes that include non-compact tribes or non-gaming and limited-gaming tribes. The California Gambling Control Commission, as the trustee of the fund, is required to make these distributions. Each eligible tribe receives $275,000 quarterly, for an annual total distribution of $1.1 million per tribe.


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