



## Gas Stations, Convenience Stores and “Gasinos” in Indian Country

by Matthew S. Robinson

As of October 2014, there were 180 tribes\* with 293 tribally-owned gas station convenience stores in 25 states. This includes 165 gaming tribes with 272 gas station/convenience stores of which 212 gas station/c-stores are located at or near a tribal casino. The following table presents a summary of tribally-owned gas station/convenience stores by state.

stores (over 51 percent) are not nationally branded. Of those with national brands, more than 38.5 percent are Conoco Phillips (Conoco/Phillips 66/Valero/76), 16.8 percent Shell, 12.6 percent Chevron (Chevron/Texaco), 12.6 percent Exxon (Exxon/Mobil) and 7.7 percent BP. Other national brands with more than one store include 7-11, Marathon, Sinclair and Tesoro.

Rather than national brands, several tribes have created their own brands including the Oneida Indian Nation of New York with its SavOn convenience store brand (13 locations) and the Winnebago Tribe of Nebraska with its Pony Express/Heritage brand (5 locations) through Ho-Chunk, Inc.

Several other tribes have nationally branded fuel components, but have created their own brands of c-stores. In Oklahoma these include the Choctaw Nation’s Choctaw Travel Plaza brand (13 locations) and Chickasaw Nation’s Chickasaw Tribal Stop (CST) brand (7 locations). In Wisconsin these include the Ho-Chunk Nation’s WhiteTail Crossing brand (5 locations) and the Oneida Nation of Wisconsin’s Oneida One Stop brand (5 locations).

Recent openings of new gas station/c-stores in Indian Country include the Tunica-Biloxi Tribe of Louisiana’s Eagle Fuels and Dairy Queen in Marksville, the Pokagon Band of Potawatomi Indians’ Bent Tree Market in Dowagiac,

Michigan and the Wichita and Affiliated Tribes’ Wichita Travel Plaza in Anadarko, Oklahoma,

There are an estimated 212 tribally-owned gas station/convenience stores located at or near Indian casinos, which includes 63 tribally-owned gas station/c-stores with on-site casinos, also known as “gasinos.” The next table (following page) presents a summary of tribally-owned gasinos by state.

There are currently 63 gasinos located in 11 states with a combined total of almost 9,300 slot machines, 34 table games and over 400 fuel kiosks. The average tribally-owned gasino has approximately 147.3 gaming positions, 6.4 fuel kiosks and 22.9 gaming positions/fuel kiosks, which vary significantly by state. Oklahoma has more than half of all

**Tribally-Owned Gas Station/Convenience Stores by State\*\***

State	Total Tribes			Tribes with Casinos			Located at /near Casino			Planned Stores
	Total Tribes*	Store Count	Fuel Kiosks	Total Tribes*	Store Count	Fuel Kiosks	Total Tribes*	Store Count	Fuel Kiosks	
Alabama	1	3	19	1	3	19	1	2	6	-
Arizona	14	20	104	12	18	98	11	12	73	3
California	27	27	185	26	26	183	25	25	174	11
Colorado	1	1	7	1	1	7	1	1	7	-
Connecticut	2	3	29	2	3	29	2	3	29	-
Florida	2	4	23	2	4	23	1	2	10	-
Idaho	3	6	39	3	6	39	3	5	35	-
Iowa	2	2	10	2	2	10	2	2	10	1
Kansas	4	5	28	4	5	28	4	5	28	1
Louisiana	3	3	28	3	3	28	3	3	28	-
Michigan	9	11	54	9	11	54	6	8	36	1
Minnesota	11	16	74	11	16	74	9	10	55	1
Mississippi	1	1	4	1	1	4	1	1	4	-
Montana	6	8	24	6	8	24	3	5	15	2
Nebraska	4	7	29	4	7	29	3	4	17	1
Nevada	11	13	43	3	3	8	3	3	8	1
New Mexico	16	27	173	11	22	148	10	18	128	1
New York	3	18	119	2	16	113	2	5	48	1
North Dakota	4	6	22	4	6	22	4	4	19	1
Oklahoma	21	50	302	20	49	300	16	42	273	6
Oregon	4	4	36	4	4	36	4	4	36	2
South Dakota	5	8	34	5	8	34	4	5	25	1
Texas	-	-	-	-	-	-	-	-	-	1
Utah	-	-	-	-	-	-	-	-	-	1
Washington	18	27	156	17	26	155	17	21	125	1
Wisconsin	9	20	97	9	20	97	9	20	97	1
Wyoming	2	3	10	2	3	10	1	2	8	1
<b>Total</b>	<b>183</b>	<b>293</b>	<b>1,649</b>	<b>165</b>	<b>272</b>	<b>1,574</b>	<b>145</b>	<b>212</b>	<b>1,294</b>	<b>39</b>

\* For the purpose of this analysis, several Tribes own gas station/convenience stores in more than one state – the actual number of individual Tribes with Tribally-owned gas station/c-stores is 180.

\*\*These numbers only include gas station/c-stores owned by a Tribe, not individual Tribal members.

Source: KlasRobinson Q.E.D.

California has the greatest number of tribes with gas station/c-stores (27 tribes), while Oklahoma has the greatest number of tribally-owned gas station/c-stores and gas station/convenience stores located at or near Indian casinos at 50 and 42 stores respectively. With respect to total store count, California, New Mexico and Washington are tied for second with 27 tribally-owned gas station/c-stores each and Arizona and Wisconsin tied for third with 20 stores each. As for stores at or near Indian casinos, California ranks second with 25 stores, Washington ranks third with 21 stores and Wisconsin ranks fourth with 20 stores.

With respect to national brands, 143 tribally-owned gas station/c-stores (almost 49 percent) are branded, while 150

### Tribally-Owned Gasinos by State

State	Gasinos	Slots	Tables	Gaming		Positions/ Gasino	Kiosks/ Gasino	Positions/ Kiosk
				Positions	Fuel Kiosks			
Oklahoma	32	5,022	17	5,141	241	160.7	7.5	21.3
California	8	1,339	8	1,395	47	174.4	5.9	29.7
Wisconsin	6	782	-	782	48	130.3	8.0	16.3
New Mexico	5	844	9	907	24	181.4	4.8	37.8
Montana	3	66	-	66	18	22.0	6.0	3.7
Wyoming	2	427	-	427	9	213.5	4.5	47.4
Idaho	2	160	-	160	4	80.0	2.0	40.0
Nevada	2	103	-	103	5	51.5	2.5	20.6
South Dakota	1	180	-	180	3	180.0	3.0	60.0
Nebraska	1	90	-	90	4	90.0	4.0	22.5
Minnesota	1	32	-	32	2	32.0	2.0	16.0
<b>Total/Average</b>	<b>63</b>	<b>9,045</b>	<b>34</b>	<b>9,283</b>	<b>405</b>	<b>147.3</b>	<b>6.4</b>	<b>22.9</b>

Source: KlasRobinson Q.E.D.

gasinos, gasino gaming positions and gasino fuel kiosks in the country with 32 properties, 5,141 gaming positions and 241 fuel kiosks. At the same time, Wyoming has the highest average of gaming positions per gasino at 213.5, Wisconsin has the highest average number of fuel kiosks per gasino at 8, while South Dakota has the highest average number of gaming positions per fuel kiosk at 60.

With respect to proximity of a tribe's gasino in relation to its main casino (should it have one), of the 63 gasinos, 37 are stand-alone while 26 are located in close proximity to the tribe's main casino, i.e., adjacent to the main casino and/or near the main casino's entrance. This information is presented in the following table.

### Tribally-Owned Gasinos by Proximity

	Gasinos	Slots Machines			Fuel Kiosks				Slots/ Kiosk
		Total	Avg.	Low High	Total	Avg.	Low High		
<b>Total</b>	63	8,865	140.7	5 750	402	6.4	1 36	22.1	
<b>Stand-Alone</b>	37	6,674	180.4	6 750	198	5.4	1 15	33.7	
<b>At/near Casino</b>	26	2,191	84.3	5 410	204	7.8	2 36	10.7	

Source: KlasRobinson Q.E.D.

More than 40 percent of all tribally-owned gasinos are located in proximity to the respective tribe's main casino – which provides a compelling argument between the difference in impulse and convenience gaming versus destination-oriented gaming. While the main casino offers a wide-range of food & beverage outlets, entertainment venues and other attractions for the more destination-oriented clientele, the gasino enterprise offers a quick and convenient opportunity for “one-stop” shopping - picking up milk and eggs, filling up the fuel tank and dropping \$20 on a slot machine (much like buying a few lottery tickets).

For the purpose of this analysis, table games, which are

located at only 5 of the 63 gasinos, are excluded. On-site gasinos tend to be smaller than stand-alone gasinos with respect to average total slot machines – 180 vs. 84 slot machines. At the same time, the average number of fuel kiosks is significantly lower at stand-alone gasinos vs. proximate gasinos to main casinos – 5.4 vs. 7.8. On a slot per kiosk basis, stand-alone gasinos have more than three times the ratio of slots per kiosk in relation to proximate gasinos.

A recent entry into the gasino market in Indian country is the Osage Nation's OC convenience store brands at its all-new casinos in Ponca City and Skiatook, Oklahoma. Unlike other gasinos, the OC convenience store not only has a physically connected casino, but on-site hotel as well.

With respect to future development, there are almost 40 tribally-owned gas station/convenience store developments planned including 11 in California, six in Oklahoma, three in Arizona and two each in Montana and Oregon. With an anticipated increase of over 10 percent in the total number of tribally-owned gas-station convenience stores over the next several years, gas station/c-stores and gasinos will continue to be an increasingly popular economic diversification alternative for Indian tribes with casinos.

As tribally-owned gas station/c-stores continue to grow and expand across Indian country, the needs and concerns of said tribal owners will continue to be a growing issue across the United States. In response to said issues, more and more tribal enterprises will pursue the creation of state and regional associations in order to address industry concerns related to fuel and tobacco sales specific to Indian country. One such organization is the Tribal C-Store Summit Group in the State of Washington ([tribalsummit.com](http://tribalsummit.com)), which

represents and advocates on behalf of more than 60 members and over 20 Native American tribes in the state. Tribal gasino and c-store owners and operators are encouraged to pursue development of associations with their peers at the state, regional and national level. ♣

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