



by Matthew S. Robinson

## Movie Theaters in Indian Country - 2017

According to the National Association of Theatre Owners (NATO), in 2016 the annual U.S./Canadian Box Office receipts was nearly \$11.4 billion, up 2 percent over 2015 – the highest ever reported. In 2016, the 43,531 U.S. and Canadian screens attracted over 1.31 billion admissions. An estimated 71 percent of the U.S./Canadian population aged two or older went to the cinema at least once in 2016 – 246 million moviegoers with an average of 5.3 tickets per moviegoer. 11 percent of the U.S./Canadian population are frequent moviegoers who attend the cinema at least once a month accounting for almost 50 percent of all tickets sold. By age group, persons age 25-39 account for 21 percent of the population, 23 percent of moviegoers and 24 percent of all tickets sold – the largest of all age groups.

Cinemas at casinos have been around for decades. The Las Vegas area alone has more than a dozen casinos with movie

such facilities where they reside. They are often packaged with other non-gaming entertainment options such as bowling, arcades, food and beverage options, etc., as a way of attracting guests of all ages, creating an “entertainment destination.” While the older kids and teens watch a movie, parent(s) can spend time on the gaming floor. In addition to attracting visitors from greater distances, theaters at Indian casinos, particularly those with hotels, can increase the length of stay as well.

There are currently eight Indian casinos with movie theaters with almost 50 screens (on-site/adjacent), including one in Alabama, two in Arizona, one in Louisiana, one in Minnesota, one in Nevada, one in Oklahoma and one in Oregon. Cinemas at Indian casinos range in size from three screens to 12 screens with an average (mean) of 6.1 screens and median of 5 screens per facility. This information is presented in the Table 1.

Table 1

**Movie Theaters at/near Indian Casinos**

Tribal Casino	Movie Theater at/near Casino	Location	Gaming Positions	Hotel Rooms	Screens	Positions /Screen	Rooms /Screen
Wind Creek Casino & Hotel	Wind Creek Cinema	Atmore, AL	2,500	236	8	312.5	29.5
Bluewater Resort & Casino	Bluewater Cinemas	Parker, AZ	619	200	4	154.8	50.0
Harrah's Phoenix Ak-Chin Casino Resort	UltraStar Multi-Tainment Center	Maricopa, AZ	1,278	300	12	106.5	25.0
Paragon Casino	Paragon Cinema	Marksville, LA	1,778	531	3	592.7	177.0
Grand Casino Mille Lacs	Grand Makwa Cinema	Onamia, MN	1,895	494	5	379.0	98.8
Avi Casino Resort	Avi 8 (Brendon)	Laughlin, NV	1,046	455	8	130.8	56.9
Choctaw Casino Resort	The District	Durant, OK	4,907	630	4	1,226.8	157.5
Wildhorse Resort & Casino	Wildhorse Cineplex	Pendleton, OR	1,329	301	5	265.8	60.2
<b>Total (8 Cinemas)</b>					<b>49</b>		
<b>Average (Mean)</b>			<b>1,919</b>	<b>393</b>		<b>313.3</b>	<b>64.2</b>
<b>Median</b>			<b>1,554</b>	<b>378</b>		<b>265.8</b>	<b>60.2</b>

Source: KlasRobinson Q.E.D.

theaters. In Las Vegas, the “Live Entertainment Capital of the World,” cinemas at casinos serve predominantly the 2 million local residents, potentially increasing the frequency of visits to the casino for both gamers and non-gamers alike.

In Indian Country, movie theaters at tribal casinos tend to be located in lesser densely populated areas, quite often where they traditionally, in this day and age, would not be in operation. Cinemas at/or near Indian casinos, in addition to accommodating local demand, serve as a marketing tool – attracting visitors from greater distances due to the lack of

On a gaming positions per screen basis, the number of positions per screen range from 106.5 to 1,226.8 gaming positions per screen, with an average (mean) of 313.3 positions per screen and median of 265.8 positions per screen. With respect to hotel rooms per screen, Indian casinos with cinemas range from 25 rooms to 177 rooms per screen, with an average (mean) of 64.2 rooms per screen and median of 60.2 rooms per screen.

Over the past five years, three new movie theaters have opened at Indian casinos – almost doubling the number of

screens. The 12-screen UltraStar Multi-Tainment Center at Harrah’s Ak-Chin opened in November 2012; the eight-screen Wind Creek Cinema at Wind Creek Casino Hotel opened in October 2013; and the four-screen The District at Choctaw Casino Resort opened in June 2015.

Currently under construction, as part of its \$100 million expansion, is an enclosed skybridge that will physically connect Harrah’s Ak-Chin Casino Resort to its UltraStar Multi-Tainment Center. The skybridge is expected to open in Fall 2017.

On August 1, 2017, the Kalispel Tribe held a ceremonial ground-breaking at Northern Quest Casino for its \$20 million 40,000 sq. ft. resort expansion “SE3,” which will include a Kids Quest, Cyber Quest, food court, retail, 17-acre RV resort and 6-screen movie and dinner complex. The 25,000 sq. ft. M&D movie theater will feature six boutique screening room auditoriums with guests able to watch a movie in recliner chairs with the option to order dinner, drinks and snacks – delivered straight to them. The cinema complex will also include a 130-seat Brut-Gourmet-style restaurant and lounge. The project is expected to open in 2018.

The Navajo Nation Shopping Centers, Inc.’s announced The Outlook at Glittering Mountain development, located adjacent to the Twin Arrows Casino & Resort, is planned to include a 6-8 screen movie theater. Turning Stone Resort Casino’s planned outlet mall development also is to include a movie theater component.

Wildhorse Resort & Casino in Pendleton, OR, which opened its five-screen Wildhorse Cineplex in late 2011, has announced plans for an \$85 million expansion that will add a second 11-story hotel tower, 32-lane bowling alley, five new restaurants and a four-screen addition at its existing movie theater. Construction could begin as early as summer 2018 with completion in 2020. The planned theater expansion is a compelling testimony to the potential of cinemas at or near casinos and the synergistic effect of grouping multiple entertainment components together to create a critical mass. The Oklahoma Choctaw have found similar success with their District concept, referenced above. While not publicly announced as of yet, and therefore not described herein, there are other proposed new developments or expansions of cinemas and entertainment district concepts in association with tribal casinos as well.

In addition to cinemas at/near tribal casinos, there also six tribes that have non-gaming related movie theaters with a total of 22 screens. Tribally-owned movie theaters include the Ho-Chunk Nation’s Marcus Theatre in Tomah, WI, which

opened in 2003, and the Miami Tribe’s B&B Miami Cineplex in Miami, OK, which was founded in 2007. Both the Chickasaw Nation in Sulphur, OK and Yakama Nation in Toppenish, WA, have theaters at their cultural museums that present programs, movies and events highlighting tribal history and heritage – with mainstream movies showing certain nights/days of the week. The Fallon Tribal Development Corporation of the Fallon Paiute-Shoshone Tribe opened its \$11.5 million, eight-screen Fox Peak Cinema, just east of downtown Fallon, NV, in November 2015. In September 2016, the Cheyenne River Indian Reservation opened its 173-seat, two-screen 7th Generation Cinema in Eagle Butte, SD. This information is presented in Table 2.

Table 2

**Other Tribally-Owned Movie Theaters**

<b>Tribally-Owned</b>	<b>Movie Theater</b>	<b>Location</b>	<b>Screens</b>
<i>Cheyenne River Indian Reservation</i>	<i>7th Generation Cinema</i>	<i>Eagle Butte, SD</i>	<i>2</i>
<i>The Chickasaw Nation</i>	<i>Anoli’ Theater</i>	<i>Sulphur, OK</i>	<i>1</i>
<i>Fallon Paiute-Shoshone Tribe</i>	<i>Fox Peak Cinema</i>	<i>Fallon, NV</i>	<i>8</i>
<i>Ho-Chunk Nation of Wisconsin</i>	<i>Ho-Chunk Cinemas (Marcus Theatres)</i>	<i>Tomah, WI</i>	<i>6</i>
<i>Miami Tribe of Oklahoma</i>	<i>Miami Nation Cineplex(B&amp;B Theatres)</i>	<i>Miami, OK</i>	<i>4</i>
<i>Yakama Nation</i>	<i>Heritage Theater</i>	<i>Toppenish, WA</i>	<i>1</i>
<b>Total (6 Cinemas)</b>			<b>22</b>
<b>Average (Mean)</b>			<b>3.7</b>
<b>Median</b>			<b>3.0</b>

Source: KlasRobinson Q.E.D.

Yet another example of tribal involvement in the cinema industry is the leasing of tribal land to outside cinema operators. While not owned or operated directly by the tribe and not associated directly with a casino operation, these theaters provide employment and entertainment opportunities to tribal members and the surrounding community and are good complimentary components for other economic development. Two examples of leased cinema operations include, one on Santa Clara Pueblo land in Espanola, NM, and one on Salt River Pima Maricopa land in Scottsdale, AZ.

Movie theaters have shown resilience and continued growth potential despite predictions of their demise – first with video tapes and DVDs – then with cable TV movie channels and now live streaming. They have proven their symbiotic benefits in casino settings in both tribal and non-tribal casino settings. While they do not fit into every tribal casino setting or tribal economic development plan, there is clear potential for pursuit of additional cinema opportunities for U.S. and Canadian tribes and First Nations, given the scope and variety of Indian gaming facilities and tribal economic environments throughout North America. ♣

*Matthew S. Robinson is Co-Founder and Principal of KlasRobinson Q.E.D., a national consulting firm specializing in the feasibility and economic impact of casinos, hotels, and other related ancillary developments in Indian Country. He can be reached by calling (800) 475-8140 or email mattmsp@mac.com.*