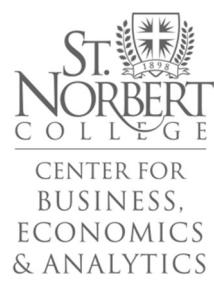


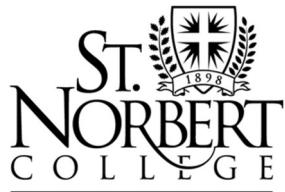
2025

THE ECONOMIC IMPACT OF THE

ONEIDA NATION

ON THE REGIONAL & STATE ECONOMY





CENTER FOR
BUSINESS,
ECONOMICS
& ANALYTICS

About the Center for Business, Economics, & Analytics (CBEA)

The Center for Business, Economics, & Analytics of the Donald J. Schneider School of Business and Economics was created to foster the relationships between the faculty and staff of St. Norbert College and the local business community. A guiding principle of St. Norbert College is the spirit of *communio*, which emphasizes and embraces the value of a community of individuals coming together to serve one another.

The CBEA is designed to embody this spirit by working hand in hand with leaders in the local business and nonprofit community to serve as a source for information, networking and collaboration, and problem-solving. The CBEA is comprised of SNC faculty and staff members and a team of our top students in majors ranging from business, economics, data analytics, and communication. The CBEA works with the greater northeast WI region to provide community-partner research, community-based research, speaking engagements, and consulting services.

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Executive Summary

The Oneida Nation's sovereignty is expressed with the signing of the Treaty of 1838. Today, the Oneida reservation encompasses 65,400 acres of land within Brown and Outagamie Counties. The total enrolled membership of the Oneida Nation in Wisconsin in 2024 was 17,239, with 7,736 members residing in Brown and Outagamie Counties. Of these, 59% live on the reservation itself.

The Oneida Nation operates a diverse range of economic enterprises across multiple industries, with its gaming, hospitality, and recreational sectors being the most widely recognized. Though less visible to the general public, the Nation's investments in capital projects, educational services, healthcare, and public and human services are vital contributions that strengthen the region's economic and social vitality. Collectively, the Nation's economic enterprises or wholly-owned tribal corporations and businesses generate significant output, income, and employment impacts throughout the local community. These enterprises range across industries including agriculture, banking, construction and engineering, gaming, gas stations, hospitality and recreation.

This study aims to quantify the economic impact of the Oneida Nation on Brown and Outagamie Counties, as well as the statewide economic impact on Wisconsin. In addition to measuring economic output, the analysis includes an assessment of state, local, and federal tax revenues to provide further context. The report also highlights the essential services provided by the Oneida Nation, offering a comprehensive view of its economic and social contributions.

All phases of the study were completed independently by the research team, with the Oneida Nation's involvement limited to providing and verifying internal data requests. The analysis is based upon an input-output model using the IMPLAN platform, which is a widely accepted modeling system used throughout the country by public, private, and nonprofit sectors. The indirect and induced impacts are captured by industry and sector-specific multipliers generated by the IMPLAN model. Indirect effects capture business activity and jobs increase, such as supply chain vendors, transportation, and services, as a result of the Oneida Nation's direct operations. Induced effects reflect the additional economic activity that occurs when employees spend their wages locally on goods and services, such as groceries, recreation, and personal services.

Economic Impact on Brown & Outagamie Counties

FY2023

Impact	Employment	Labor Income	Output
Direct	3,266	\$179,003,345	\$653,322,969
Indirect	1,251	\$76,340,131	\$180,117,210
Induced	892	\$50,266,537	\$150,366,029
Grand Total	5,409	\$305,610,012	\$983,806,208

Economic Impact on Wisconsin

FY2023

Impact	Employment	Labor Income	Output
Direct	3,272	\$179,184,351	\$653,705,487
Indirect	1,364	\$84,423,582	\$224,381,463
Induced	1,246	\$71,075,307	\$214,520,927
Grand Total	5,883	\$334,683,239	\$1,092,607,877

Direct & Total Economic Impact of the Oneida Nation

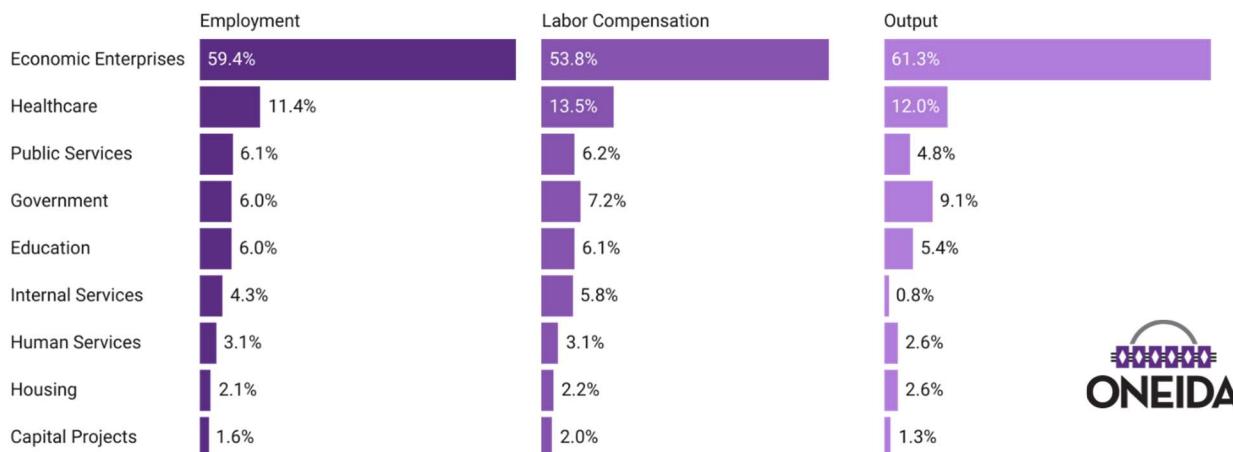
Brown & Outagamie Counties | FY2023

Category	Direct Employment	Direct Compensation	Direct Output	Total Employment	Total Compensation	Total Output
Capital Projects	60	\$4,470,586	\$7,694,892	87	\$6,121,639	\$13,000,641
Economic Enterprises	1,961	\$90,766,338	\$416,283,286	3,211	\$164,512,852	\$603,002,808
Education	211	\$12,092,101	\$32,578,489	323	\$18,704,458	\$53,586,114
Government	85	\$8,512,313	\$59,894,893	326	\$22,125,730	\$89,442,517
Healthcare	384	\$27,428,625	\$74,922,869	617	\$41,247,766	\$118,006,733
Housing	60	\$3,227,323	\$14,085,356	116	\$6,874,621	\$25,515,516
Human Services	116	\$6,695,936	\$16,317,271	165	\$9,613,775	\$25,640,830
Internal* Services	170	\$13,956,993	\$4,693,117	233	\$17,586,125	\$8,143,180
Public Services	219	\$11,853,129	\$26,852,795	332	\$18,823,046	\$47,467,870
Grand Total	3,266	\$179,003,345	\$653,322,969	5,409	\$305,610,012	\$983,806,208

* Internal services output/funding is actually estimated to be \$25.8M in FY2023, however \$21.2M is derived from the indirect cost rate charged to other Oneida entities, thus it is excluded from this analysis to avoid double counting.

Contribution to Oneida Nation Total Economic Impact

Percent of each category of the total impact on Brown & Outagamie Counties



The Economic Impact of the Oneida Nation

Key Findings

This analysis presents the direct, indirect, induced, and total effects on employment, compensation, and output by the Oneida Nation on the local two-county regional economy as well as the state of Wisconsin based on data from the 2023 fiscal year.

1. Federal government data from 2023 BEA and BLS sources indicate that the Brown and Outagamie County region generated \$40.4 billion in gross regional product, \$30.2 billion in personal income, and about 264 thousand people employed.
2. The direct impact of the Oneida Nation on this regional economy was \$653.3 million in output, \$179.0 million in compensation, and 3,266 jobs.
3. The total direct, indirect, and induced effects associated with Oneida Nation economic activity are: \$983.8 million in output, \$305.6 million in compensation, and 5,409 jobs.
4. The Oneida Nation and its entities contributed an estimated 2.4% of gross regional product, 1.0% of employee compensation, and 2.0% of jobs in the two-county region.
5. When expanding the analysis to include spending beyond the two-county region and a broader geographic scope, the total estimated economic impact on the state of Wisconsin increases to 5,883 jobs, \$334.7 million in labor compensation, and \$1.09 billion in total economic output.
6. Most of the economic activity is driven by the economic enterprise sector comprising roughly 60% of the total employment and output, and 54% of the labor compensation. These tribally sponsored corporations and businesses generate profit that is transferred to the Oneida Nation as government revenue/funding to support their government and social programs.
7. The Oneida Nation is responsible for generating an estimated \$94.1 million in government revenue in FY2023, with \$32.2 million going to the state and local level.
8. The Oneida Nation prioritizes spending on education, government services, healthcare, housing, human services, and public services for its members. In-house usage by members reduces the pressures on similar programs, offered to the public by state and local governments in the two-county region.

The goal of this study is to highlight the economic impact of the Oneida Nation on the Brown and Outagamie County region and the state. The Oneida Nation's pursuit of its Seventh Generation Vision, which emphasizes the growth and development of its people through strong community values and environmental stewardship, contributes to positive economic growth and development statewide and in the surrounding Brown and Outagamie County region.



ECONOMIC IMPACT OF THE ONEIDA NATION



OVERALL IMPACT

ON BROWN & OUTAGAMIE COUNTIES



Like a stone into water
our impact ripples outward



TOTAL DIRECT, INDIRECT, AND INDUCED IMPACTS ASSOCIATED WITH ONEIDA NATION ECONOMIC ACTIVITY

\$984M in output **\$306M** in compensation **5,409** jobs

Since Oneida's last economic impact study in 2018 there has been a change of
+\$240M in output **+92M** in compensation

In a two-county region, Oneida Nation is responsible for
2.4% gross regional product

1.0% employee compensation
2.0% employment

DIRECT IMPACT OF THE ONEIDA NATION ON THE REGIONAL ECONOMY

\$653M in output **\$179M** in compensation **3,266** jobs

KEY TERMS

Direct Impact

The actual amount of jobs & spending by the Oneida Nation

Indirect Impact

Increase in jobs & spending at other businesses due to Oneida's direct spending

Induced Impact

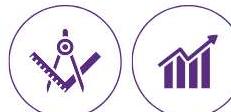
Compensation from direct & indirect employment spent in local area



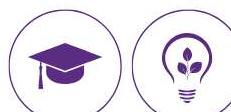
\$94.1M

ESTIMATED REVENUE GENERATED BY THE ONEIDA NATION FOR FEDERAL, STATE, AND LOCAL GOVERNMENT

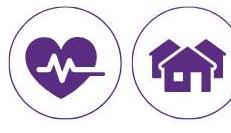
CONTRIBUTING SECTORS:



capital projects economic enterprises



education public services



healthcare housing



human services government & internal services



OVERALL IMPACT ON WISCONSIN



TOTAL DIRECT, INDIRECT, AND INDUCED IMPACTS ASSOCIATED WITH ONEIDA NATION ECONOMIC ACTIVITY

\$1.09B in output **\$335M** in compensation **5,883** jobs

The Oneida Nation is pursuing its seventh generation vision of emphasizing growth and development of their people through strong community and stewardship of the environment; the surrounding Brown and Outagamie county region is experiencing positive externalities of these efforts through economic growth and development



The Economic Impact of the Oneida Nation study was independently conducted by the Center for Business, Economics, & Analytics at St. Norbert College

The Economic Impact of the Oneida Nation

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1. Introduction & Objective

The Oneida Nation has a rich history that predates Wisconsin's statehood, with deep regional roots. It is a successor to the aboriginal Oneida Nation and entered into the 1838 Treaty with the Oneida, which established the reservation's presence in northeastern Wisconsin. The Oneida Nation continues to honor its cultural heritage and ancestral legacy through its Seventh Generation Vision. This vision prioritizes the growth and development of its people by fostering community engagement and environmental stewardship, both now and for future generations.

The Oneida reservation spans approximately 65,400 acres across Brown and Outagamie counties, making up around 8.7% of the total land area in those counties. The Oneida Nation, as of 2024, has 17,239 enrolled members, with 7,736 residing in Brown or Outagamie counties, which comprises roughly 1.7% of the total population in these counties. Of these, about 59%, or 4,544 members, live on the reservation, while the remaining 3,192 live off-reservation.

Though the Oneida Nation is a well-known presence in the region, the full extent of its economic impact is difficult to capture and quantify. The Nation's economic footprint is broad, encompassing industries such as construction, capital projects, business enterprises, education, healthcare, housing, social services, and government operations. These operations not only deliver goods and services to the local community but also support local businesses, create jobs, generate income, and provide tax revenues. Additionally, the Nation's social programs help ease the burden on state and local government services by offering essential support to tribal members.

This study aims to quantify the economic impact of the Oneida Nation on Brown and Outagamie counties, as well as the statewide economic impact on Wisconsin. Using data on employment, compensation, and revenue, the study estimates the direct, indirect, and induced effects of the Nation's economic activities. Beyond these figures, the analysis will explore key areas of the Oneida Nation's influence on the region, including tax and government revenue contributions, as well as the social services that alleviate pressures on local and state governments. The Nation's investments in education, healthcare, housing, and human services not only benefit its members in alignment with the Seventh Generation Vision, but also have significant positive spillover effects on the broader regional economy. This study will demonstrate how the Oneida Nation's presence has a far-reaching, positive influence on the economic well-being of Brown and Outagamie counties.

The report is structured as follows: first, it will outline the methodology and data used for analysis, followed by a description of the Oneida Nation's operations, which sets the stage for the economic impact findings. The remainder of the report will delve into key programs such as education, housing, healthcare, and human services, and discuss their contributions to the regional economy and government revenues.

2. Methodology & Data

There are several methods for measuring the economic impact of an organization or entity. One of the most commonly used approaches in economic impact studies is input-output analysis, which serves as the foundation for this study. Input-output analysis models the total economic impact of a change within an economy. The initial change, known as the direct effect, captures the immediate impact of the event or activity. For example, if a company invests in new capital by constructing a building, the spending on construction represents the direct effect.

What makes input-output analysis valuable is its ability to capture the secondary, or multiplier, effects. These effects arise as direct spending circulates through the local or regional economy. Multiplier effects occur in two forms: indirect and induced effects. The indirect effect refers to businesses that benefit from the direct spending. For instance, if a construction company spends money on materials for a new building, the local suppliers providing those materials are experiencing the indirect effect. The induced effect occurs when employees from these businesses (benefiting from the direct and indirect spending) receive wages that they then spend on other goods and services in the local economy, further supporting other businesses.

In summary, this study applies input-output analysis to assess how the Oneida Nation's operations create direct economic effects that multiply through indirect and induced effects, leading to their total economic impact. This impact will be measured through three main variables: jobs, employee compensation, and economic output.

The analysis was conducted using the IMPLAN platform, a widely recognized economic modeling system used by public, private, and nonprofit sectors for economic impact studies. IMPLAN incorporates data from the U.S. Bureau of Economic Analysis (BEA) and the Bureau of Labor Statistics (BLS) to create a unique regional data matrix for the analysis.

An essential element of any economic impact study is defining the geographic region of focus. Since the Oneida reservation spans Brown and Outagamie counties, and most of their operations and employees (both Oneida and non-Oneida) are based in this area, the study uses these two counties as the geographic region. Therefore, the primary results reflect the economic impact within Brown and Outagamie counties. However, as an extension, this analysis also expands to explore the impact on the state of Wisconsin.

The data used in this study was provided by the Oneida Nation specifically for this analysis. The data, covering the 2023 fiscal year, was independently analyzed by the CBEA researchers. While it is common to average data over multiple years for this type of study, the years following the pandemic created non-typical behaviors across several revenue streams, grants, funding sources, and costs, thus they are not representative examples of normal times. The most recent data was used at the time of the study initiative for analysis. However, the one exception is the data regarding large-scale capital expenditures, where a longer time frame was used, which is discussed in more detail in the study.

3. Overview of Oneida Tribal Operations

Assessing the economic impact of the Oneida Nation is no small task. The Nation not only runs a range of profit-generating enterprises, but also operates as a sovereign government providing essential services to its community, from basic social programs to healthcare, housing, and environmental protection. The goal of this analysis is to evaluate the collective impact of all these tribal operations.

Before diving into the operational structure used in this analysis, it is important to understand the unique nature of the Oneida Nation's operations. As a sovereign government, the Oneida Nation has several profit-generating entities. However, unlike traditional businesses, all profits from these enterprises are reinvested to fund the Nation's government and social services. In essence, these funds support investments in the Nation's physical, human, social, and environmental capital, ensuring its long-term sustainability.

The scale of the Oneida Nation's profit-generating operations spans multiple industries and is key to funding other tribal services. These include agricultural ventures like the Oneida Nation Farm and Apple Orchard, as well as services through the Oneida ESC Group (OESC) ranging from environmental, engineering and design, construction, and technology. Additionally, the Oneida Nation offers financial services through Bay Bank and operates several gaming outlets, including the main Oneida Casino and smaller gaming venues. The Nation is also involved in hospitality and recreation, owning a hotel and the Thornberry Creek golf course, and operates the Oneida One Stop gas stations and convenience stores across Brown and Outagamie counties.

In FY2023, these enterprises generated \$416.2 million in economic output (excluding cost of goods sold), employed 1,961 people, and paid out approximately \$91 million in wages and benefits. After covering wages, benefits, compact fees, and operational costs, the enterprises netted roughly \$148.5 million in FY23. These funds are combined with tribal program income and external funding to make up the Nation's revenue base.

Oneida Nation Economic Enterprise Net Profit

FY2023

Item	Category	FY2023
Revenues	Economic Enterprises	\$416,283,286
	Revenue Total	\$416,283,286
Costs	Operational Costs	\$167,465,521
	Wages & Benefits	\$90,766,338
	Compact Fees	\$9,551,330
	Costs Total	\$267,783,189
Profit	Net Economic Enterprise Profit	\$148,500,097

Composition of Tribal Funding & Expenditures

FY2023

Funding

percent

Federal & State Funding

30.1%

Tribal Program Fees, Premiums, Interest, & Other

18.3%

Tribal Contributions

51.6%

Spending

percent

Capital Projects

3.2%

Education

13.7%

Government, Internal, and Public Services

19.0%

Direct Member Benefits

19.5%

Healthcare & Human Services

38.5%

Housing

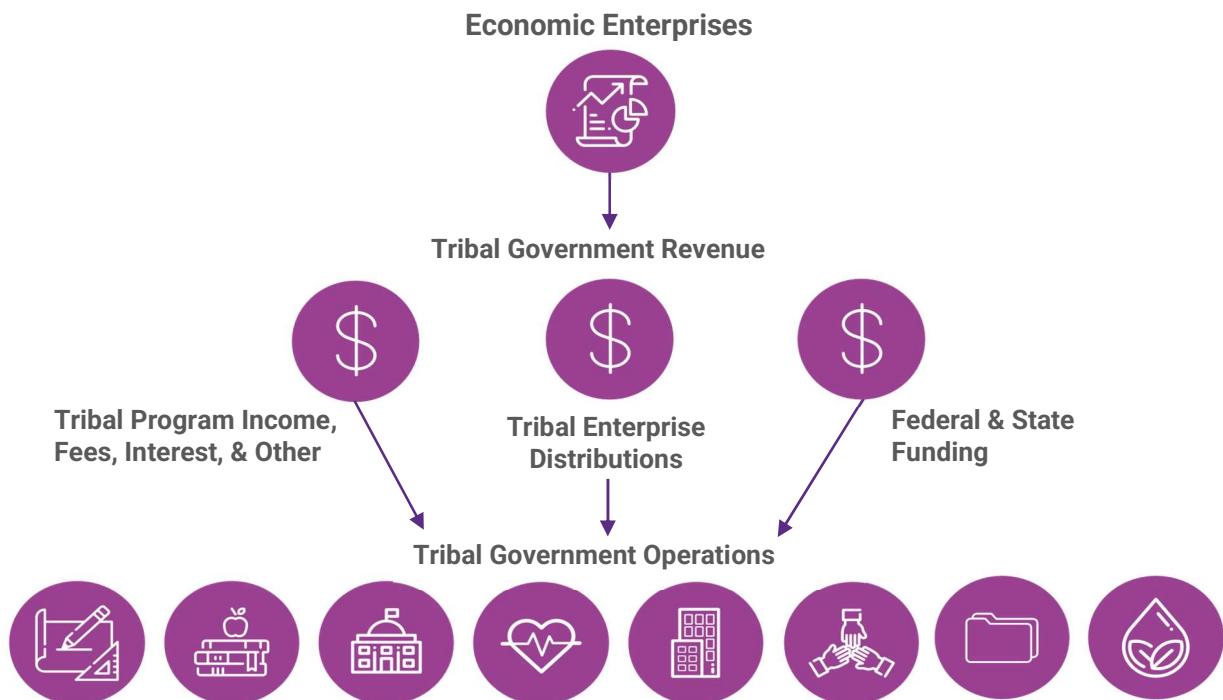
5.9%

In FY2023, 30% of the Oneida Nation's revenue came from state and federal sources, with the remaining 70% generated through its own economic enterprises and other tribal sources. This self-sustaining model is a key feature of the Oneida Nation's economic structure. As shown in the figure, the majority of the revenue (77% in FY2023) was allocated directly to services for tribal members, such as education, healthcare, human services, housing, and direct benefits. The remaining funds supported government operations, capital projects, and public works.

For the purpose of this economic impact study, a more granular breakdown of the Oneida Nation's operations was needed. The operations were grouped into nine broad categories, which help isolate the specific sectors driving the Oneida Nation's overall economic impact. These categories reflect both the revenue-generating enterprises and the various tribal operations that provide social and governmental services to the Nation and its members.

The figure on the following page offers an overview of these categories, which include a range of economic enterprises as well as social and governmental support services. Key areas of focus include education, healthcare, housing, and human services. For education, the Nation provides childcare, early education, and Head Start programs, along with a library and K-12 schools. Its healthcare services range from behavioral, dental, optical, and medical care to a pharmacy, fitness facility, and nursing home. The Oneida Nation also runs a comprehensive housing division, offering both income-based (HUD-funded) and non-income-based housing programs for rental and homeownership assistance.

Overview of Tribal Funding & Operations



In addition to these services, the Oneida Nation offers social and human services, including child and family support, economic development, food security, and elder care. As a sovereign government, the Oneida Nation also provides its own public services such as environmental, health, and safety functions, police and emergency management services, and its own judicial and family court systems. Like other governments, the Oneida Nation funds operations for internal support services like accounting, finance, human resources, and management information systems, as well as capital projects. In terms of the non-economic enterprises, the combination of these entities accounted for approximately \$237 million in economic activity, employed 1,305 individuals, and provided another \$88 million in labor income and benefits.

Taken together, the direct economic impact of the Oneida Nation on Brown and Outagamie counties in FY2023 was significant. Before providing the direct effect estimates, it is important to note that it is customary for the cost of goods sold in the retail sector to be excluded from direct effect estimates (e.g., these funds leak from the region and therefore are not included as part of the impact). In FY2023, the retail cost of goods sold was an estimated \$69 million, and thus is subtracted off the economic enterprise output.

The total direct effect of the Oneida Nation in FY2023 was \$653.3 million, with \$416.3 million coming from economic enterprises. The Oneida Nation's operations directly employed 3,266 people and contributed \$179 million in compensation to the regional workforce.

4. Economic Impact Analysis

A. Regional Impact: Brown & Outagamie Counties

This study's objective is to quantify the impact of the Oneida Nation on the two counties where the reservation is located, Brown and Outagamie, and the state of Wisconsin. This section will focus on the two-county region, and the state analysis will be addressed later.

The Oneida Nation directly contributes \$653.3 million in total output, \$179.0 million in employee compensation, and 3,266 jobs throughout Brown and Outagamie counties.

The direct impact of the Oneida Nation as reported above shows the immediate money and jobs created in the economy from their various entities, funds, and activities. To better analyze the true economic impact of the Oneida Nation, it is important to add the indirect and induced impacts that take place after the introduction of new entities. These impacts refer to the multiplier effects that show the additional money and jobs created from the entity's economic activity. Together, these three impacts can provide a more accurate picture of the true impact going beyond the initial activity. When accounting for the direct, indirect, and induced effects of the Oneida Nation for Brown and Outagamie counties, this study suggests they generated \$983.8 million in total output, \$305.6 million in total compensation, and 5,409 jobs. To understand the impact the Oneida Nation has on their residing region and state, it is necessary to investigate the various tribal operations.

Economic Impact on Brown & Outagamie Counties

FY2023

Impact	Employment	Labor Income	Output
Direct	3,266	\$179,003,345	\$653,322,969
Indirect	1,251	\$76,340,131	\$180,117,210
Induced	892	\$50,266,537	\$150,366,029
Grand Total	5,409	\$305,610,012	\$983,806,208

Oneida Economic Impact by Group | FY2023

Group Name	Impact	Employment	Labor Income	Output
Capital Projects	Direct	60	\$4,470,586	\$7,694,892
	Indirect	8	\$596,341	\$2,002,631
	Induced	19	\$1,054,711	\$3,303,118
	Total	87	\$6,121,639	\$13,000,641
Economic Enterprises	Direct	1,961	\$90,766,338	\$416,283,286
	Indirect	771	\$46,786,856	\$102,820,779
	Induced	479	\$26,959,658	\$83,898,742
	Total	3,211	\$164,512,852	\$603,002,808
Education	Direct	211	\$12,092,101	\$32,578,489
	Indirect	57	\$3,521,050	\$11,687,145
	Induced	55	\$3,091,308	\$9,320,479
	Total	323	\$18,704,458	\$53,586,114
Government	Direct	85	\$8,512,313	\$59,894,893
	Indirect	177	\$9,958,280	\$17,693,251
	Induced	65	\$3,655,137	\$11,854,373
	Total	326	\$22,125,730	\$89,442,517
Healthcare	Direct	384	\$27,428,625	\$74,922,869
	Indirect	112	\$7,018,475	\$18,760,130
	Induced	121	\$6,800,666	\$24,323,734
	Total	617	\$41,247,766	\$118,006,733
Housing	Direct	60	\$3,227,323	\$14,085,356
	Indirect	36	\$2,511,273	\$8,176,926
	Induced	20	\$1,136,025	\$3,253,234
	Total	116	\$6,874,621	\$25,515,516
Human Services	Direct	116	\$6,695,936	\$16,317,271
	Indirect	21	\$1,335,742	\$4,371,207
	Induced	28	\$1,582,097	\$4,952,351
	Total	165	\$9,613,775	\$25,640,830
Internal Services	Direct	170	\$13,956,993	\$4,693,117
	Indirect	12	\$749,830	\$2,022,060
	Induced	51	\$2,879,302	\$1,428,003
	Total	233	\$17,586,125	\$8,143,180
Public Services	Direct	219	\$11,853,129	\$26,852,795
	Indirect	58	\$3,862,284	\$12,583,080
	Induced	55	\$3,107,633	\$8,031,995
	Total	332	\$18,823,046	\$47,467,870
Grand Total		5,409	\$305,610,012	\$983,806,208

* Internal services output/funding is actually estimated to be \$25.8M in FY2023, however \$21.2M is derived from the indirect cost rate charged to other Oneida entities, thus it is excluded from this analysis to avoid double counting.



Economic Enterprises

Oneida Nation's economic enterprise sector is the largest contributor to total output, employment, and employee compensation in Brown and Outagamie counties. In this sector, gaming, construction and engineering, a hotel, gas stations, and banks are some of the enterprises with the largest effects in this region.

Gaming has a direct output of \$248.8 million and total output of \$323.9 million in Brown and Outagamie counties. The calculated output of the gaming sector is aggregated from the five gaming locations; the location near the Austin Straubel International Airport is considered the Main Casino and generates \$193 million in total output. The gaming sector alone creates 1,465 total jobs in Brown and Outagamie counties.

While the gaming enterprises are one of the largest contributors to output and jobs, there are a multitude of other economic enterprises that create the sizable economic impact that the Oneida Nation has on the region and state.

The retail enterprises are another significant contributor to the economic output created in Brown and Outagamie counties. These enterprises include the chain of seven One Stop gas stations and convenience stores and three smoke shops. Together these businesses generate \$25 million in total output and 158 jobs. The actual revenue of these retail observations was significantly higher, but the cost of goods sold such as gasoline and tobacco were excluded from the direct economic impact given the passthrough of funds for these goods to outside the region. Oneida Nation additionally has three Bay Bank locations which contribute a total of \$16.8 million in output, \$4.9 million in compensation, and 68 jobs.

Agriculture also plays an important role in Oneida Nation's economic enterprises. The Oneida Nation farm, cannery, and orchard provide employment and income opportunities while showcasing the variety of local fresh produce and goods. Together, these agricultural enterprises generate \$5.2 million in total output and \$1.3 million in total compensation for the 31 jobs.

The economic enterprises sector accounts for 61% of Oneida Nation's total economic output, generating \$603 million. This sector creates \$164.5 million in total compensation for the 3,211 total jobs for Brown and Outagamie counties.



Capital Projects

Capital project and construction expenditures are categorized separately from the construction and engineering activities reported under economic enterprise, OESC. This distinction reflects construction projects commissioned by the Oneida Nation or its entities. Like many organizations, the Nation uses a competitive bidding process for capital improvements, selecting the most qualified and cost-effective service providers. As a result, this spending category captures economic activity directly driven by the Nation's demand activity that would not otherwise occur without their investment.

While this study focuses on the operational data in FY2023, the analysis regarding capital projects reflects the five-year average of these expenditures. Generally speaking, large capital expenditures tend to fluctuate significantly from year-to-year, so using the average approach is intended to smooth out this volatility and proxy for a typical year. For example, from 2020 to 2024, there was a year that only had \$350 thousand in spending post-pandemic, and in FY2024, there was \$16.7 million in capital spending. The five-year average over this period was about \$7.7 million per year. The IMPLAN leverages the regional input-output data to estimate the associated employment and labor income associated with this type of capital investment.

For this analysis, the estimated \$7.7 million in direct output would also directly support 60 jobs, and \$4.5 million in labor income, which would have an estimated total impact of \$13.0 million in output, \$6.1 million in labor income and 87 jobs in the region.



Education

Within the education sector, the Oneida tribal school is the largest contributor to total economic output, generating \$15 million to Brown and Outagamie counties. The entire education sector creates 323 total jobs in Brown and Outagamie counties with the tribal school creating 101 of those jobs alone. The Oneida Nation Education Fund, Head Start, and Cultural Heritage Department are the next largest contributors to total output and jobs in the region. As a whole, this sector contributes a total of \$53.6 million in output, \$18.7 million in compensation, and 323 jobs.



Healthcare

The healthcare sector produces \$118 million in total output, 617 jobs, and \$41.2 million in compensation in Brown and Outagamie counties through Oneida Nation's variety of clinics, programs, benefits, and projects. The medical clinic contributes to \$23 million of the healthcare sector's total output. Consolidated health services are the next highest contributors to total output in the healthcare sector, producing \$19.5 million. The community health services provide case management, disease prevention, and nutrition services to support the entire Oneida community with healthy, safe lifestyles. This sector contributes 68 total jobs to improve the quality of life for the Oneida community. Other notable contributors in the healthcare sector include pharmaceutical, dental, optical, and behavioral health services. Together these services contribute an additional \$36.3 million in total output to Brown and Outagamie counties.



Housing

Oneida Nation's Comprehensive Housing Division which manages the Housing Authority and Land Management make up this sector contributing a total of \$25.5 million in output, \$6.9 million in compensation, and 116 jobs. The Housing Authority has been funded by the Department of Housing and Urban Development which is completely grant funded. This division alongside Land Management ensures safe and affordable housing opportunities for those on the Oneida reservation.



Human Services

The Human Services sector supports the well-being of the Oneida Nation community. This sector is made up of various family and individual, economic, and community support services. Oneida Nation's Child Support Enforcement and Indian Child Welfare are the largest contributors, both generating roughly \$2.8 million in total output. Together these services meet the psychological and physical needs of the Oneida Nation children and create stability through various programs and the teaching of cultural values. Oneida Nation Food Assistance Programs, such as the emergency food pantry and Food Distribution Center, provide nutritional information and information on creating a healthy lifestyle in addition to supplying food and resources to members in need.

In total, Human Services contributed a total of \$25.6 million in output, \$9.6 million in compensation, and 165 in employment for Brown and Outagamie counties.



Government, Internal Services & Public Services

The Government sector consists of services necessary to manage the Oneida Nation's sovereign government. The General Tribal Council, the governing body of the Oneida Nation, and various committees that help guide government operations are part of this sector. This sector also consists of departments, committees, and programs to help administrative and operational actions. Government services contribute a total economic output of \$89 million with 326 jobs and \$22.1 million in compensation for Brown and Outagamie counties.

Internal Services are services that help with the operational needs of the tribe. This includes services such as accounting, finance, risk management, and information systems. Internal services contribute 233 total jobs and \$8.1 million in output. It is important to highlight that the output generated by this sector is technically larger (estimated to be \$25.8M) with much of the funding (\$21.1M) coming from indirect costs paid by other entities within the tribe as facilities and administration (F&A) costs. However, they are excluded here to avoid double counting, as these funds were already counted as output elsewhere in the analysis. This is why the output is smaller than the compensation for this sector in the study.

The Public Services sector includes services such as law enforcement, courts, emergency response, and judicial support, as well as the development division. The Oneida Police Department and Tribal Judicial System are the largest contributors to total output, producing \$9 million and \$2 million respectively. The total output for this sector is \$47.5 million with 332 jobs and \$18.8 million in employee compensation.

Overall Economic Impact of the Oneida Nation on Brown & Outagamie Counties

The Oneida Nation directly contributes \$653.3 million in total output, \$179.0 million in employee compensation, and 3,266 jobs throughout Brown and Outagamie counties. As noted, the combined effects of these tribal operations are responsible for an average annual impact of \$983.8 million in output, \$306 million in employee compensation, and 5,409 jobs in Brown and Outagamie counties.

4. Economic Impact Analysis

B. State Impact: Wisconsin

Economic Impact on Wisconsin

FY2023

Impact	Employment	Labor Income	Output
Direct	3,272	\$179,184,351	\$653,705,487
Indirect	1,364	\$84,423,582	\$224,381,463
Induced	1,246	\$71,075,307	\$214,520,927
Grand Total	5,883	\$334,683,239	\$1,092,607,877

In addition to the regional or local economic impact, the statewide impact of the Oneida Nation was also evaluated. While the approach and analysis is the same, there are two notable differences: the first is accounting for any direct impacts that occur outside of the previous two-county analysis, and the second is the larger multiplier effects at the statewide level.

In terms of the direct effects, all the data discussed in the previous section is included as the input in the statewide analysis with the addition of two items. While a large percentage of tribal members live on or near the reservation, there are many that live in southeast Wisconsin. As part of an outreach effort, the Nation has a satellite office that serves members in the counties of Milwaukee, Kenosha, Racine, Ozaukee, Washington, and Waukesha. This is referred to as the Southeastern Oneida Tribal Services (SEOTS). This office has both operational expenditures and board expenditures that totaled roughly \$386 thousand dollars in funding, \$181 thousand in income, and 6 jobs in FY2023. These are added to the direct effects to comprise the statewide impact.

One of the core principles of input-output analysis is to account for leakage of economic activity for a region. Generally speaking, studies with smaller geographic footprints, such as counties, will tend to have smaller multiplier effects, than studies that focus on larger geographies, such as states. This is simply due to the fact that there will be more leakage at the county level. For example, imagine there is an employee that works for an Oneida economic enterprise that lives just outside Brown and Outagamie counties. A portion of this individual's spending will "leak" outside of the two-county study region, however, it would be captured within the state study region. In other words, multiplier effects will be larger at the state level, which will increase the impact estimates.

When accounting for these adjustments, the direct effect contribution in FY2023 was 3,272 jobs, \$179.2 million in income, and \$653.7 million in output, which yields the total estimated impact of the Oneida Nation on Wisconsin as 5,883 jobs, \$334.7 million in compensation, and economic output of \$1.09 billion.

4. Economic Impact Analysis

C. Multiplier Effects

Oneida Nation Economic Impact Multipliers | Regional vs. State

County-level (Brown & Outagamie) multipliers vs Wisconsin multipliers for FY2023



As noted, the magnitude of these multiplier effects depends in large part on the geographic scope of the analysis. In general, larger regions such as states tend to exhibit higher multiplier values than smaller regions like counties. This occurs because larger geographic areas are more economically diverse and self-contained, which increases the likelihood that spending and the associated ripple effects remain within the region. For example, while a county may rely on outside firms for specialized services or supplies, a state is more likely to have those resources available internally, resulting in a more extensive chain of economic interactions. In this study, we compare the economic multipliers at the county level to those at the state level to highlight this difference. All of these numbers were calculated as the ratio of the total estimate (which includes the multiplier effects) to the direct impact (the actual data from the Nation).

As shown in the accompanying chart, the county-level output multiplier is estimated at 1.51, while the corresponding state-level multiplier is 1.67. This means that for every dollar of direct spending, total economic output increases by \$1.51 dollars within the county, and by \$1.67 dollars at the state level. Stated another way, for each dollar in economic output (revenue for economic enterprises or spending for other Oneida entities) by the Nation, an additional \$0.51 is generated in the local economy, and an additional \$0.67 is generated in the state economy. This indicates greater retention and circulation of economic activity across the broader state economy. The income multiplier at the county level is 1.71, compared to 1.87 at the state level, suggesting that each dollar of labor income generated by the direct activity results in \$1.71 of total labor income in the county and \$1.87 at the state level. Finally, the employment multiplier reveals that for every direct job created, 1.66 total jobs are supported in the county and 1.8 jobs at the state level, reflecting the broader employment linkages present in a larger regional economy.

5. Discussion & Findings

A. Regional Economic Impact in Context

The Oneida Nation is located in Brown and Outagamie Counties. According to the Bureau of Economic Analysis for 2023, these two counties comprised \$40.4 billion in gross regional product and \$30.2 billion in regional labor compensation. This compensation was divided among the 263,983 employees within the two-county region, in which Brown County has a total population of 271,417 and Outagamie County has a population of 193,234. Of that population, the Quarterly Census of Employment and Wages from the BLS estimates that there were 156,272 people employed in Brown County in 2023, and 107,711 employed in Outagamie County. When compared to the Oneida Nation results, these numbers imply that the Nation has a noticeable impact on the regional economy.

While the Nation contributed roughly \$653.3 million in direct economic output in FY2023, not all of that is necessarily counted in regional GDP. GDP is designed to capture spending on final goods and services in the economy or the production of goods and services in the economy. It is common for the governments (state, local, federal, and tribal) to spend funds for which no good or service is exchanged. For example, the federal government pays seniors social security funds each month, however, this is not spending on a good or service, so it is deemed a transfer payment, and thus this transaction is excluded from GDP (although it could be captured elsewhere in the economy in consumption if those funds are spent). Thus, one approach to GDP calculation is the value-added approach which captures the value added (revenue minus the cost of intermediate inputs) contribution to the economy.

Based on the estimates from the input-output analysis, IMPLAN estimates that of the \$653.3 million in direct output, this contributes \$307 million in value-added contribution to the regional economy. When accounting for the multiplier effects, about \$515.4 million of the \$983.8 million in total economic output is considered value-added. This implies that, while the total economic output is equivalent to an estimated 2.4% of regional GDP, from a value-added perspective the Oneida Nation is responsible for 1.3% of the estimated \$40.4 billion in official GDP for Brown and Outagamie Counties.

Given the estimated total impact of \$305.6 million in labor income to the regional economy, this accounts for the \$30.2 billion in regional labor compensation, or roughly 1.0% of the income in the region. From the jobs perspective, of the estimated 264 thousand employed people in Brown and Outagamie Counties in 2023, in total impact, the Oneida Nation contributed 5,409 jobs or 2.0% of the employment in the region.

According to the Wisconsin Department of Workforce Development, the Oneida Nation is the 5th largest employer in Brown County and the 14th largest in Outagamie County. This statistic is based on the employment of just the Oneida Nation, and does not include its corporations and jobs created from direct spending. According to Oneida Nation data, an estimated 58% of those employees are Native-American whereas the other 42% are not; the Oneida Nation has a great impact not only on its own members but many other individuals with no ties to the tribe.

5. Discussion & Findings

B. Education Impact

The educational sector of the Oneida Nation directly generated \$32.6 million in economic output, paid \$12.1 million in income, and contributed 211 jobs to the local economy in FY2023. These numbers are indicative of the tribe's dedication to, and investment in, education.

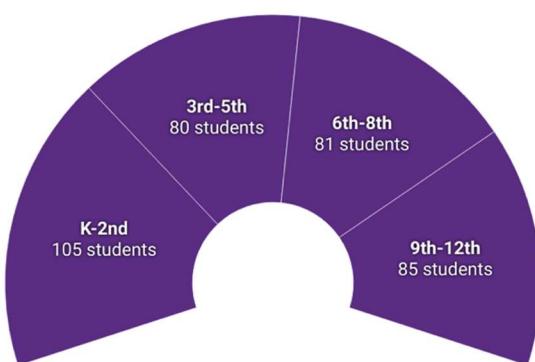
Tribal schools account for roughly 37% of the total education impact, with nearly \$19.7 million in total output and providing employment for 152 people. Higher education spending follows closely, contributing about 24% or \$12.7 million of the overall education sector's output. The Head Start program also makes a substantial impact, contributing approximately \$4.2 million in total output, underscoring the tribe's continued commitment to early childhood education. Together, these top three educational subsectors form about three-fourths of the sector's total economic activity.

Oneida's own school serves 372 students from kindergarten through high school, offering a standard curriculum along with unique programs like the Summer Food Program and Yehti Program, which provides meals and alternative learning environments to fit different needs. There is a relatively even distribution across the enrollments, with slightly more students in the kindergarten to 2nd grade age range as noted in the figure. The Oneida Head Start program also enrolled 82 kids (ages 3-5) in SY24', which helps students get a head start before kindergarten.

The Oneida Youth Enrichment Services (YES) program provides extra academic support and enrichment to students. There are 16 advocates and specialists working in schools across Freedom, Seymour, West De Pere, and Green Bay, helping 615 students who qualify based on tribal enrollment or ancestry. The YES program advocates for students of all ages, but works heavily with junior high and high school students.

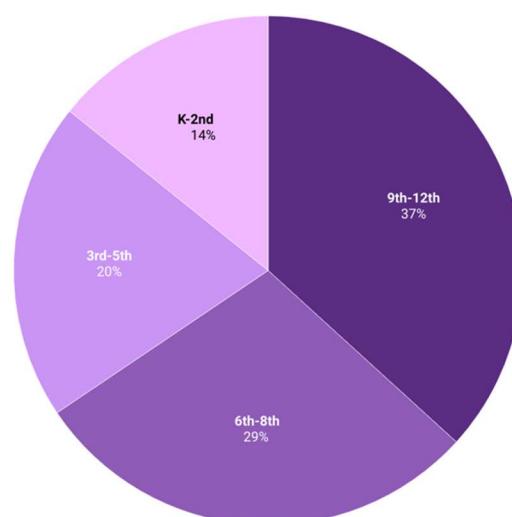
Oneida School Enrollment by Grades

2024 School Year



YES Students by Grade

SY 2024: 615 students total from K-12



In 2022-23, the attendance rate for AIAN (American Indian/Alaska Native) high school students in Brown and Outagamie Counties was 80.0%, lower than the 89.2% average for all students. The graduation rate for AIAN students was 79.2%, compared to 89.5% overall, and the dropout rate was 2.3% (slightly higher than the 1.5% overall rate). These numbers show why continued investment in education and culturally relevant support is so important.

The Higher Education Program has made a huge difference for students looking to continue their education, covering over \$140 million in costs for members working toward degrees since inception. In the 2023-2024 academic year, the department supported 697 clients ranging in age from 18 to 70, with an average age of 30. Clients pursued a wide range of academic goals, ranging from certificates to graduate degrees. The most popular fields of study included Business, Health, Social Science, Education, and Trades. The top institutions attended were Northeast Wisconsin Technical College, UW-Green Bay, UW-Milwaukee, College of Menominee Nation, and UW-Madison. During the year, 39 students completed their programs, earning credentials that included three technical diplomas, eight associate degrees, 21 bachelor's degrees, six master's degrees, and one health field doctorate. These outcomes reflect continued investment in higher education across generations and fields critical to community and workforce development.

Education is not just about students; it is also a huge player in the local economy. The Oneida Nation Educational Fund, Head Start, and Cultural Heritage Department are also contributors to jobs and total economic output in the region. When combined with the previous school data, in total, Oneida's education system created 323 jobs, which generated \$18.7 million in compensation and contributed \$53.6 million to the economy in FY2023.

By having its own schools and educational programs, the Oneida Nation reduces costs for local taxpayers in Brown and Outagamie Counties and helps prepare students for their future while keeping them connected with their cultural roots in language and history. According to the Badger Institute, the education cost per student in Wisconsin in 2022-2023 was \$16,345, which implies that the 372 students in the Oneida Nation school system are saving the local school districts nearly \$6.1 million per year (in 2023 dollars). When you add the additional support of the Oneida YES program and its counselor services actively working with students in the schools, which employs 13 people and spends roughly \$652,000 in compensation, this puts a conservative cost savings of an estimated \$6.7 million per year.

These investments don't just help students, they support local families, business, and the future workforce, making sure the Oneida Nation stays strong for future generations. Education is at the heart of Oneida's mission which is about empowering the younger generation, growing the economy, and keeping culture alive. By continuing to invest in education, the Nation is making sure future generations have the needed skills, opportunities, and support to thrive in their next stage.

Overall, the Oneida Nation's sustained commitment to education through strategic investments and impactful programs highlights their dedication to nurturing future generations, enhancing community vitality, and supporting the economic health of the entire region.

5. Discussion & Findings

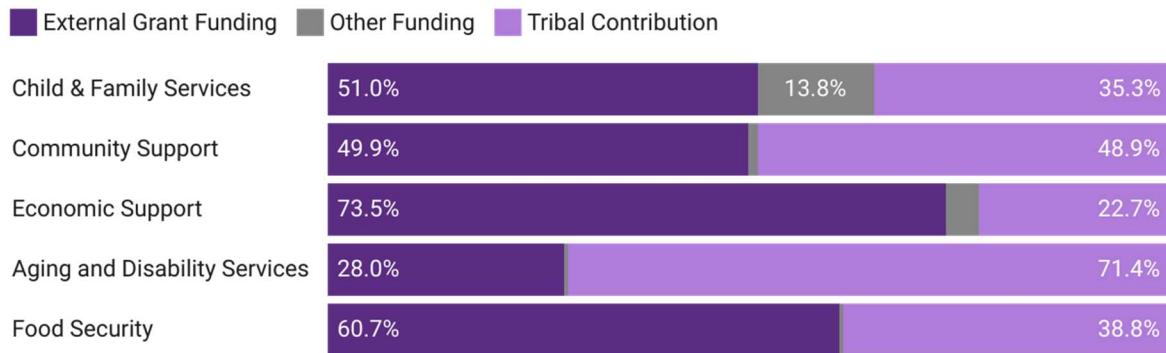
C. Human & Social Services Impact

Rooted in its Seventh Generation Vision and the principle of Tsi? niyukwalihot[^], the belief that all are family, the Oneida Nation prioritizes the well-being of its people through dedicated human and social services. This sector plays a crucial role in addressing community needs. With 116 individuals directly employed in service-based roles, \$6.7 million in compensation, and \$16.3 million in direct spending in FY2023, these efforts extend beyond direct support, contributing to a broader economic impact of \$25.6 million in output and sustaining 165 jobs across the region. By fostering strong families and a resilient economy, the Nation ensures lasting support for both current and future generations.

For the purposes of this study, Human Services programming has been organized into five categories: Child and Family Services, Community Support, Economic Support, Aging and Disability Services, and Food Security. These services are essential to the well-being of the Oneida community and are supported through a mix of tribal contributions, external grants, and other funding. In FY2023, the Oneida Nation contributed approximately \$6.7 million or 41.0% of the \$16.3 million in total Human Services spending. Tribal funding plays a particularly significant role in the Community Support and Aging and Disability Services areas, as shown in the figure, demonstrating the Nation's deep commitment to supporting its members beyond the limitations of external aid. While federal and state dollars remain important, the tribe's financial participation enables tailored, responsive programs that address the unique needs of Oneida citizens.

The Child and Family Services category, in particular, delivers broad social and economic impact. Many households rely on this network of support, including programs aligned with the Indian Child Welfare Act, Kinship Care, and the Oneida's own state-licensed foster care system. The Oneida Nation's integrated approach to care also includes the tribally operated Child Support Agency and Family Court system. For context, in FY2023, Oneida received 718 Indian Child Welfare Act notifications and served 2,846 clients in their child support program. The Child Support Agency handles cases exclusively for tribal members, allowing for smaller caseloads, more frequent reviews, and customized service models that ease pressure on surrounding county agencies. The Family Court, which averages roughly 319 hearings a year, handled roughly 521 hearings in FY2023, and serves as a culturally grounded alternative to county courts, offering both community benefit and cost savings to local governments.

Human Services Funding



The Nation's Community Support services include emergency financial assistance and the Oneida Public Transit system, which provides fixed routes and door-to-door service, an essential resource in a region with limited public transit. In FY2023, Oneida Transit provided essential transportation services to 1,679 unique clients who took at least one trip during the year. The system averaged 122 trips and 114 passengers per day, resulting in a total of 30,235 passenger trips over the course of the year. Aging and Disability Services help aging and disabled members live independently, with access to transportation, meals, activities, and financial assistance. Food Security programs include the Food Distribution Center, the Emergency Food Pantry, and FoodShare. These programs distributed meals and funding to 2,901, 2,180, and 2,720 recipients respectively in FY2023. These collective efforts are highly valued by the community as 68% of respondents in the 2022 QOL survey described social services as positive and about 70% expressed satisfaction with Oneida Aging and Disability services for elders.

5. Discussion & Findings

D. Healthcare Impact

The Oneida Comprehensive Health Division (OCHD) is a healthcare organization dedicated to providing a wide range of medical services to members of the Oneida Nation, their descendants, and neighboring Tribes. Guided by a holistic and culturally sensitive approach, OCHD focuses on promoting physical, emotional, mental, and spiritual well-being. The division offers services that integrate traditional practices with modern medical care, ensuring that patients receive compassionate and culturally respectful treatment. OCHD is committed to supporting the health and wellness of Indigenous communities through comprehensive, community-focused care.

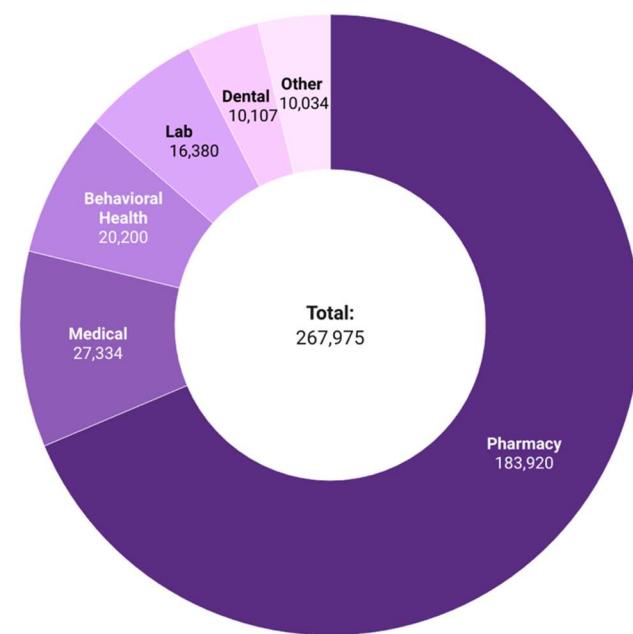
The OCHD provides a wide range of healthcare services to enrolled members, ensuring access to quality medical care across various specialties. Dedicated medical teams offer diagnosis and treatment of health conditions, preventative care, well-child visits, immunizations, family planning, minor surgical procedures, and chronic disease management. They specialize in Internal Medicine, Family Practice, Pediatrics, Podiatry, Diabetes Care, and Obstetrics and Gynecology. Comprehensive services include medical, dental, optical, therapy, behavioral health, community health, pharmacy, and telehealth services. Additionally, skilled nursing care is available at the Anna John Resident Centered

Care Community, a 48-bed facility offering 24-hour skilled nursing care, along with employee health services to support workplace wellness.

In FY2023, the Nation employed approximately 384 health care professionals, with a combination of both members and non-members. Structured training programs educate both Native and non-Native providers on culturally sensitive care that upholds its vision and Seventh Generation philosophy. The healthcare operations directly supported 384 jobs, generated \$27.4 million in wages, and contributed \$74.9 million to economic output in FY2023. When factoring in multiplier effects, the total economic impact rose to 617 jobs, \$41.2 million in wages, and \$118 million in overall output.

Oneida Healthcare Encounters by Department

2024



The economic impact of this department only tells part of the story, as Oneida healthcare contributes far more than jobs and money to the community. These healthcare service statistics reflect the Oneida Nation's dedication to providing essential and culturally informed care to its community. In the medical sector alone, 8,674 patients accounted for 27,334 visits, underscoring the high demand for general healthcare services. Behavioral health remains a critical focus, with 2,869 patients making 20,200 visits, emphasizing the importance of mental well-being within the Nation. Additionally, lab services supported 6,192 patients with 16,380 visits, while dental care reached 4,767 patients through 10,107 visits. Optical services also played a vital role, assisting 3,826 patients with 9,094 visits. In total, these five branches have served 26,328 patients (12,090 unique patients) and provided helpful care with 83,115 visits. These figures demonstrate the community's reliance on accessible, high-quality healthcare, reinforcing the need for continued investment in health services to ensure long-term well-being, resilience, and prosperity for the Oneida people.

In 2024, the Oneida Nation's healthcare services continued to play a vital role in supporting community well-being. The Pharmacy served 11,164 customers and dispensed 183,920 prescriptions, ensuring widespread access to essential medications. The Health Promotion Disease Prevention Department provided specialized care to 93 patients, accounting for 709 visits, highlighting the Nation's commitment to proactive and preventative health measures. Additionally, the Anna John Resident Centered Care Community provided long-term and rehabilitative services to 50 patients throughout the year. These services underscore the Nation's dedication to comprehensive, accessible, and culturally attuned healthcare, ensuring the sustained health and resilience of its people. The success of this area is demonstrated in the 2022 Oneida QOL survey results which indicated an 82% positive rating for health care access and a 78% positive rating for the quality of healthcare.

5. Discussion & Findings

E. Housing Impact

The Oneida Nation plays an important role in providing housing opportunities and stability for its members. Through its Comprehensive Housing Division, the Nation has invested heavily in housing initiatives, helping families secure homes while also strengthening the local economy. This is a very important issue for tribal members. In the 2022 QOL survey, about 35% of respondents ranked housing an important goal for the Nation to prioritize for the future, the highest of the 16 categories.

The Oneida housing sector consists of 60 direct positions, contributing to a broader regional employment impact of 116 jobs when factoring in the multiplier effects. With a direct output of \$14.1 million and a regional economic impact of \$25.51 million, these investments not only support families but also boost surrounding communities. It is important to note that the direct output is derived from several sources including rental and lease income in addition to some grant support.

In FY2023, the Comprehensive Housing Services managed a total of 458 housing units, including 357 income-based rentals, 101 general rental units, 22 income-based rent-to-own units, and 29 elder rental units. The occupancy rate stood at 93%, with 38 units vacant and in various stages of repair or preparation.

The Oneida Nation's Comprehensive Housing and Land Management contribute notably to the local economy through job creation and financial activities. Specifically, the former employs 54 people directly, with an additional 26 indirect and 16 induced positions, totaling 96 jobs. Its direct economic contribution is around \$10.35 million, extending to a regional impact of approximately \$18.82 million. Likewise, the Land Management sector directly employs six individuals resulting in a total of 20 positions including the multiplier effects. Its direct financial contribution amounts to \$3.74 million, with a broader regional economic influence nearing \$6.70 million. Overall, these efforts reflect the Oneida Nation's active role in supporting economic stability and job growth within the community and the surrounding area.

In conclusion, the Oneida Nation's investments in housing and land management offer valuable support to tribal members while positively influencing local economic activity and employment. These focused initiatives effectively enhance community development and regional economic health.

5. Discussion & Findings

G. State & Local Government Revenue Impact

This study aims to assess the regional economic impact of the Oneida Nation's operations and enterprises. Much of the preceding analysis has focused on job creation, economic output, and social contributions. However, an equally important dimension is the extent to which state and local governments benefit from the presence and activity of the Oneida Nation. These benefits arise through two primary channels. First, the significant level of economic activity driven by the Nation leads to increased tax and fee revenues for governments at multiple levels. Second, the Nation's broad array of services provided to its members helps alleviate some of the demand placed on state and local public service systems.

Although tribal members may receive certain tax exemptions under treaty rights, they are still subject to many forms of taxation. For instance, in Wisconsin, only tribal members who both live and work on their own reservation are exempt from state income tax. Those who work on tribal land but live off-reservation remain taxable. Moreover, a large portion of the Oneida Nation's workforce is made up of non-tribal members, meaning those earnings are fully taxable under state and federal law.

Using available data from FY2023, the figure estimates the annual fiscal impact of the Oneida Nation's activities. At the federal level, tribal operations generated over \$34.7 million in actual taxes paid through personal income taxes and payroll taxes. State government revenues from the Oneida Nation contributed \$15.4 million derived from income taxes, regulatory fees, and the gaming compact. This also does not include the additional revenue from various excise taxes such as those on cigarettes. Local governments also received \$3.5 million through property taxes and cooperative governance agreements. In total, the Oneida Nation actually contributed \$53.6 million in FY2023 to federal, state, and local revenues.

The Oneida Nation's economic footprint generates a substantial multiplier effect, contributing additional jobs, labor income, and overall economic output through indirect and induced impacts. These secondary effects also result in increased tax revenues, including personal income taxes, corporate taxes, and excise taxes. Using IMPLAN input-output analysis, the potential tax contributions from these effects were estimated and are reflected in the accompanying figure. When combined with previously reported tax data, the total estimated government revenue generated by the Oneida Nation reached \$94.1 million in FY2023. This includes \$61.8 million directed to the federal government, \$27.1 million to the State of Wisconsin, and \$5.1 million to local governments. These results, while based on conservative modeling, reflect the substantial fiscal return that federal, state, and regional governments derive from the Nation's presence.

Taxes and Government Revenue Derived from the Oneida Nation Economic Activity

Fiscal Year 2023

Jurisdiction/Source	Item	Value
Federal Government	Federal Personal Income Tax	\$13,950,093
	Payroll Taxes	\$20,729,248
	Additional Gov. Revenues from Indirect and Induced Effects	\$27,151,345
	Federal Total	\$61,830,686
State Government	State Personal Income Tax	\$4,888,025
	Other WI State Taxes Fees, Compacts	\$10,519,197
	Additional Gov. Revenues from Indirect and Induced Effects	\$11,715,594
	State Total	\$27,122,816
Local Governments	Property Taxes	\$1,745,587
	Service Agreements	\$1,758,102
	Additional Gov. Revenues from Indirect and Induced Effects	\$1,621,448
	Local Total	\$5,125,137
		Total \$94,078,639

Beyond revenue generation, the Oneida Nation also provides services that reduce the burden on surrounding governmental systems. With over 7,700 tribal members living in Brown and Outagamie Counties, both on and off the reservation, the Nation delivers critical services in healthcare, education, housing, and economic support. Although the precise cost savings to other governments is difficult to quantify, Oneida budget data from FY2023 reveals that substantial tribal government spending is directed toward community services, including health, education, social programs, and direct member benefits. This equated to over \$175 million in spending, of which about \$36.1 million was funded through state and federal grants. While this should not be interpreted as direct savings to other governments, it clearly reduces the demand on county and state programs.

Several examples illustrate how the Oneida Nation helps offset the demand on local government services. In education, the Nation's tribal school system, high school and the YES program, provided services to students who would otherwise attend public schools, resulting in an estimated savings of over \$12 million for local school districts in FY2023. In the judicial system, the Nation's Family Court and Judicial Court handled 666 hearings and other proceedings at a cost of \$1.7 million, cases that would otherwise fall to county courts. Similarly, the Oneida Child Support Agency manages a significant number of cases that would typically be handled by county agencies, offering more specialized support while easing administrative burdens. These examples highlight the Oneida Nation's dual role not only as a major economic driver, but also as a vital partner in delivering public services across the region.



The Economic Impact of the Oneida Nation

6. Concluding Remarks

This economic impact study was conducted to assess the contributions of the Oneida Nation to the regional economy of Brown and Outagamie Counties, as well as to the broader state of Wisconsin. As the analysis demonstrates, the Oneida Nation plays a vital role through its operations, enterprises, and service offerings, generating significant employment, income, and economic output. These activities span across nine major sectors: capital expenditures, economic enterprises, education, government services, healthcare, housing, human services, internal services, and public services. Using an input-output modeling framework, this study quantifies the Oneida Nation's economic footprint across these areas.

The results are clear: the Oneida Nation is a key regional economic driver. Its direct operations generated approximately \$653.3 million in output, \$179 million in labor compensation, and 3,266 jobs in FY2023. When accounting for the full ripple effects through the regional economy, total impact estimates rise to \$983.8 million in output, \$305.6 million in compensation, and 5,409 jobs, representing 2.4% of total output, 1.0% of total compensation, and 2.0% of all jobs across Brown and Outagamie Counties. As one of the larger employers in the region, the Oneida Nation supports both tribal and non-tribal workers. When accounting for funding spent outside of this two-county region and larger state level multiplier effects, the Oneida Nation is responsible for contributing an estimated total of 5,883 jobs, \$334.6 million in labor compensation and \$1.09 billion in economic output to the state of Wisconsin in FY2023.

Economic Impact on Brown & Outagamie Counties

FY2023

Impact	Employment	Labor Income	Output
Direct	3,266	\$179,003,345	\$653,322,969
Indirect	1,251	\$76,340,131	\$180,117,210
Induced	892	\$50,266,537	\$150,366,029
Grand Total	5,409	\$305,610,012	\$983,806,208

Economic Impact on Wisconsin

FY2023

Impact	Employment	Labor Income	Output
Direct	3,272	\$179,184,351	\$653,705,487
Indirect	1,364	\$84,423,582	\$224,381,463
Induced	1,246	\$71,075,307	\$214,520,927
Grand Total	5,883	\$334,683,239	\$1,092,607,877

Economic enterprises, ranging from gaming, hospitality, and retail to construction, finance, and agriculture, play a central role in the Nation's fiscal model. These enterprises alone account for roughly 60% of the Nation's jobs and 61% of its total economic output. Yet the impact goes far beyond profit-generating activity. The Oneida Nation invests heavily in core services that elevate community well-being. In education, the Nation provides early childhood through secondary education, community learning programs, and higher education scholarships. Human services programs address critical needs in child and family services, elder care, food security, and income support, with the Nation covering a substantial portion of the cost of these programs. Healthcare is another cornerstone of the Oneida Nation's contribution serving over 25,000 active patients (non-unique) in FY2023 with over 265,000 encounters. In housing, the Nation facilitates access through rental assistance, rent-to-own options, and tribal credit programs, all of which is designed to make housing more affordable and accessible.

Beyond economic and service contributions, the Oneida Nation also delivers measurable value to federal, state, and local governments. This study estimates the Nation contributed \$94.1 million in government revenues, including \$61.8 million federally, \$27.1 million to the State of Wisconsin, and \$5.1 million locally. Just as important, many of the Nation's programs alleviate pressure on public systems.

In summary, the Oneida Nation's impact on the Brown and Outagamie County region, as well as the state of Wisconsin, is both deep and wide-ranging. Through its pursuit of the Seventh Generation Vision, centered on sustainable community development, cultural preservation, and economic resilience, the Oneida Nation drives not only growth for its members but also creates substantial value for the broader region. This study reaffirms the Nation's essential role as a regional economic engine and community partner.

