



Gas Stations and Convenience Stores in Indian Country

by Matthew S. Robinson

As of June 2019, there were 196 tribes with 364 tribally-owned gas station/convenience stores (c-stores) in 27 states. This includes 179 gaming tribes with 345 gas station/c-stores, of which 237 gas station/c-stores are located at or near a tribal casino. The following table presents a summary of tribally-owned gas station/c-stores by state.

As presented in Table 1, California has the greatest number of tribes with gas station/c-stores (31 tribes), while Oklahoma has the greatest number of tribally-owned gas station/c-stores located at or near Indian casinos at 67 and 54 stores, respectively. With respect to total store count, Washington State ranks second with 47 tribally-owned gas station/c-stores, followed by California with 32 stores, New Mexico with 29 stores and Arizona with 27.

Over the past five years, the number of tribally-owned gas station/c-stores in Indian Country have increased significantly with the number of tribes increasing by 6.6 percent, the number stores increasing by 19.5 percent and the total number of fuel kiosks increasing by 26 since 2014.

With respect to national brands, 192 tribally-owned gas station/c-stores (52.7 percent), carry a national fuel brand – up from less than 49 percent in 2014. Of those with national brands, 29.7 percent are Conoco Phillips (Conoco, Phillips 66, 76), 20.8 percent Shell, 12.6 percent Exxon (Exxon/Mobil), 12 percent Chevron (Chevron/Texaco), and 4.2 percent British Petroleum (BP, Aral, Amoco). Other national brands with more than one store include Sinclair, Tesoro, Valero, AMBEST, Alon (formerly FINA) and Cenex.

Rather than national brands, several tribes have created their own brands including the Choctaw Nation of Oklahoma with 16 Choctaw Travel Plaza locations, the Oneida Indian Nation of New York with its SavOn Convenience Store brand (11 locations), the Winnebago Tribe of Nebraska with its Pony Express / Heritage brand (7 locations) through Ho-Chunk, Inc. and the Seneca Nation of New York's Seneca One Stop (4 locations).

Several other tribes have created their own brands of c-stores – many of which still carry national fuel brands. In New Mexico, the Pueblo of Laguna, through its Laguna Development Corporation, has Route 66 Travel Centers and 66 Pit Stops (4 locations). In Oklahoma, the Chickasaw Nation has Chickasaw Travel Stops – CST (8 locations). In Washington State, there is the Confederated Tribes of the Colville Reservation's Colville Fuels (8 locations), the Puayallup Tribe's Tahoma Market and Tahoma Express (6 locations), the Nisqually Indian Tribe's Nisqually Markets (6 locations) and

Table 1 **Tribally-Owned Gas Station /Convenience Stores by State**

State	Total Tribes			Tribes with Casinos			Located at /near Casino		
	Total Tribes*	Store Count	Fuel Kiosks	Total Tribes*	Store Count	Fuel Kiosks	Total Tribes*	Store Count	Fuel Kiosks
Alabama	1	3	26	1	3	26	1	3	26
Arizona	15	27	149	12	23	117	11	12	69
California	31	32	214	31	32	214	30	30	200
Colorado	2	2	17	2	2	17	2	2	17
Connecticut	2	3	29	2	3	29	2	3	29
Florida	2	4	23	2	4	23	1	2	10
Idaho	3	8	51	3	8	51	3	6	38
Iowa	2	2	17	2	2	17	2	2	17
Kansas	4	6	25	4	6	25	4	4	19
Louisiana	2	2	19	2	2	19	2	2	19
Michigan	10	14	76	10	14	76	8	11	56
Minnesota	11	17	94	11	17	94	8	9	60
Mississippi	1	2	6	1	2	6	-	-	-
Montana	6	9	33	6	9	23	2	5	13
Nebraska	4	9	28	4	9	28	3	5	19
Nevada	12	16	69	5	8	37	4	4	25
New Mexico	16	29	223	12	25	196	9	12	115
New York	3	19	141	3	19	141	2	8	77
North Dakota	4	6	22	4	6	22	3	4	15
Oklahoma	23	67	424	22	66	424	19	54	362
Oregon	5	5	56	5	5	56	5	5	56
South Dakota	4	7	35	4	7	35	4	5	27
Texas	2	2	18	2	2	18	1	1	10
Utah	1	1	1	-	-	-	-	-	-
Washington	19	47	294	18	46	293	17	28	194
Wisconsin	9	22	124	9	22	124	9	18	104
Wyoming	2	3	13	2	3	13	1	2	10
2019 Total	196	364	2,227	179	345	2,124	153	237	1,587
2014 Total	183	293	1,649	165	272	1,574	145	212	1,294
% Change	6.6%	19.5%	26.0%	7.8%	21.2%	25.9%	5.2%	10.5%	18.5%

Source: KlasRobinson Q.E.D.

“A recent trend in Indian Country is the development of gas station/c-stores with expanded grocery and convenience retail - with an emphasis on fresh food offerings prepared on site.”

the Spokane Tribe of Indian’s Spoko Fuels (4 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 (4 locations).

With respect to facilities and amenities at gas station/c-stores in Indian Country, of the 364, 13.7 percent have a drive-thru smoke shop, 11.3 percent have car washes, and almost 5 percent have showers, laundry and/or trucker lounges. Food and beverage offerings range from basic snack food and deli-type “grab-n-go” set ups to signature roadside diners – there is even one with a permanent food truck on-site. National fast-food franchises are also becoming increasingly common. 1 in 12 tribally-owned gas station/c-stores has a national fast-foot chain restaurant. Popular franchises include Subway, Sonic, Burger King, McDonalds, Arby’s, A & W, Dairy Queen and Fatburger.

A recent trend in Indian Country is the development of gas station/c-stores with expanded grocery and convenience retail - with an emphasis on fresh food offerings prepared on site. The Choctaw Nation in Oklahoma has developed Choctaw Country Market, which features a full-service grocery store with sit-down deli area, made-to-order and pre-packaged meals, fresh produce, on-site butcher and gas station. To date, there are two Choctaw Country Markets – Clayton (August 2016) and Boswell (March 2019), with a third location in Coalgate, OK planned to open in 2020 and additional locations being considered.

The Oneida Nation of New York has developed Maple Leaf Market, its newest convenience store brand, focused on providing healthier grab-and-go meal and snack choices with fresh, made-to-order food for its guests. The property features locally-produced food and beverage offerings and includes a full-service gas station and touch-free car wash. To date, there are three locations – Sherril (November 2017), Chittenango (February 2018) and Sylvan-Verona Beach, NY (May 2018), with a fourth location in Bridgeport, NY planned to open in 2019.

Of the estimated 237 tribally-owned gas station/c-stores located at or near Indian casinos, 63 include on-site casinos, also known as “gasinos.” Over the past five years, the number of tribally-owned gasinos has increased by 33.3 percent since 2014.

As presented in Table 2 on the following page, there are currently 84 gasinos located in 15 states with a combined total of almost 10,920 slot machines, 45 table games and over 575 fuel kiosks. The average tribally-owned gasino has

approximately 133.7 gaming positions, 6.9 fuel kiosks and 18.9 gaming positions/fuel kiosk, which vary significantly by state. With respect to proximity of a tribe’s gasino in relation to its main casino (should it have one), of the 84 gasinos, 49 (58.3 percent) are stand-alone, while 26 (41.7 percent) are located in close proximity to the tribe’s main casino – albeit adjacent to the main casino and/or near the main casino’s entrance.

Oklahoma has 50 percent of all gasinos, 46.5 percent of gasino fuel kiosks and more than 57 percent of gasino gaming positions in the country with 42 properties, 268 fuel kiosks and 6,425 gaming positions. At the same time, Wyoming has the highest average of gaming positions per gasino at 212.5; New York has the highest average number of fuel kiosks per gasino at 12; and Montana has the highest average number of gaming positions per fuel kiosk at 44.6.

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Table 2

Tribally-owned “Gasinos” by State

State	Count	Fuel Kiosks	Slots	Tables	Gaming Positions	Positions/Gasino	Kiosks/Gasino	Positions/Fuel Kiosk	Near Casino	Stand Alone
Arizona	2	11	69	-	69	34.5	5.5	6.3	1	1
California	10	80	1,513	10	1,583	158.3	8.0	18.9	6	4
Idaho	3	15	187	-	187	62.3	5.0	12.5	-	3
Minnesota	1	7	36	-	36	36.0	7.0	5.1	1	-
Montana	5	13	580	3	601	120.2	2.6	44.6	-	5
Nebraska	1	2	84	-	84	84.0	2.0	42.0	1	-
Nevada	3	22	228	-	228	76.0	7.3	10.4	-	3
New Mexico	5	58	713	5	748	149.6	11.6	12.3	3	2
New York	2	24	49	-	49	24.5	12.0	2.0	1	1
Oklahoma	42	268	6,236	27	6,425	153.0	6.4	23.3	20	22
Oregon	1	11	30	-	30	30.0	11.0	2.7	-	1
South Dakota	2	15	193	-	193	96.5	7.5	12.9	1	1
Washington	1	7	120	-	120	120.0	7.0	17.1	-	1
Wisconsin	4	33	450	-	450	112.5	8.3	13.6	-	4
Wyoming	2	10	425	-	425	212.5	5.0	42.5	1	1
2019 - Total	84	576	10,913	45	11,228	133.7	6.9	18.9	35	49
<i>2014 - Total</i>	<i>63</i>	<i>405</i>	<i>9045</i>	<i>34</i>	<i>9283</i>	<i>147.3</i>	<i>6.4</i>	<i>22.9</i>	<i>26</i>	<i>37</i>
<i>Percent Change</i>	<i>33.3%</i>	<i>42.2%</i>	<i>20.7%</i>	<i>32.4%</i>	<i>21.0%</i>	<i>-9.3%</i>	<i>6.7%</i>	<i>-17.3%</i>	<i>34.6%</i>	<i>32.4%</i>

Source: KlasRobinson Q.E.D.

By size, tribal “gasinos” tend to be larger than non-gaming gas station/c-stores owned by Indian tribes. Table 3 presents a comparison of tribally-owned gas station/c-stores, with and without on-site gaming operations.

While gasinos account for less than 25 percent of all tribally-owned gas station/c-stores, more fuel kiosks, particularly diesel and significantly larger building square footage – more than twice the average (mean) and median square footage of tribal gas station/c-stores without casinos due to the additional space required by the gaming operation.

Gasinos have an average (mean) of 6.9 total fuel kiosks, 4.8 gasoline kiosks and 2.2 commercial diesel kiosks; and a median of 7 total fuel kiosks, 4 gasoline kiosks and 1 commercial diesel kiosk per operation. In comparison, tribally-owned gas station/c-stores without on-site gaming operations have an average (mean) of 5.9 total fuel kiosks, 4.7 gasoline kiosks and 1.2 commercial diesel kiosks and a median of 5 total fuel kiosks, 4 gasoline kiosks and zero commercial diesel kiosks per operation.

With respect to building size, the average (mean) square footage for an Indian gasino is almost 13,700 sq. ft., while the median square footage is 9,625. In comparison, non-gaming gas station/c-stores owned by Indian tribes have an average (mean) square footage of 5,750 and a median square footage of 4,750 per store.

As Indian tribes continue their pursuit of economic

independence, gas station/c-stores will remain a viable option for economic development and diversification. In addition to providing goods and services to tribal members and other area residents, tribally-owned gas station/c-stores not only keep revenues on the reservation, but can generate tax revenues and fees for that tribe’s government as well. There also exist a variety of economies of scale

for tribal enterprises with multiple such facilities (built or purchased on or off the reservation) including bulk discounts, joint marketing savings, etc.

Table 3

Tribally-owned Gas Station/C-Store and “Gasino” Comparison

Gasino	Count	Total Kiosks	Gas Kiosks	Diesel Kiosks	Store (s.f.)
Total	84	576	401	175	1,150,250
Average (Mean)		6.9	4.8	2.2	13,693
Median		7.0	4.0	1.0	9,625
Non-Gasino					
Total	280	1,651	1,326	325	1,609,975
Average (Mean)		5.9	4.7	1.2	5,750
Median		5.0	4.0	-	4,750
Total					
Gas Station/C-Stores	364	2,227	1,727	500	2,760,225
Average (Mean)		6.1	4.7	1.4	7,583
Median		6.0	4.0	-	5,500

Source: KlasRobinson Q.E.D.

An excellent resource for tribes looking at getting into the fuel and convenience store industry is the Tribal Convenience Store Association (TCSA), which includes almost 30 tribes spanning multiple states. The TCSA’s mission: tribes helping tribes lead the convenience-store industry through peer networking, vendor partnerships, and member education. Additional information on the TCSA can be found at www.tribalcstores.org. ♣

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