



Hotels at Indian Casinos – 2020

by Matthew S. Robinson

As of December 31, 2019, there were 213 Indian casinos with hotel properties with a combined total of 55,266 rooms – an average of 259 rooms per casino with a hotel. As presented in Table 1, during 2019, an additional eight Indian casinos added hotel properties, with several other Indian casinos also completing expansions resulting in a 6.6 percent increase in the number of hotel rooms and a 3.9 percent increase in the number of Indian casinos with hotels.

& Casino Tampa, FL, as well as the opening of Hard Rock Hotel & Casino Sacramento at Fire Mountain, CA. In November, the Estrella hotel property at Casino Del Sol in Tucson, AZ and Havasu Landing Resort & Casino in Havasu Lake, CA each celebrated their grand openings.

During 2020, another six Indian casinos will open new hotels, with another six expanding their existing properties for a combined total of more than 1,600 additional rooms.

Table 1

Annual Hotel Room Growth at Indian Casinos
(As of December 31, 2019)

Year Ending (12/31)	Forecast 2022	Forecast 2021	Estimate 2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
Indian Casino Hotel Rooms	62,467	59,946	56,901	55,266	51,864	50,468	49,074	47,326	45,861	44,497	41,736	39,275	38,554
Percent Change	4.2%	5.4%	3.0%	6.6%	2.8%	2.8%	3.7%	3.2%	3.1%	6.6%	6.3%	1.9%	4.6%
Indian Casinos w Hotels*	230	222	219	213	205	201	198	193	189	186	168	160	157
Percent Change	3.6%	1.4%	2.8%	3.9%	2.0%	1.5%	2.6%	2.1%	1.6%	10.7%	5.0%	1.9%	4.7%
Rooms/Indian Casino	272	270	260	259	253	251	248	245	243	239	248	245	246
Percent Change	0.6%	3.9%	0.1%	2.6%	0.8%	1.3%	1.1%	1.1%	1.4%	-3.7%	1.2%	0.0%	0.0%

* There are dozens of Indian casinos with more than one hotel/lodging property - Accordingly, the actual number of individual hotels is greater.

Source: KlasRobinson Q.E.D.

Openings in 2019 included the all-new Soboba Casino Resort in San Jacinto, CA and the hotel expansion and waterpark addition at 7 Clans First Council Casino Hotel near Newkirk, OK – both in February. The Sycuan Casino Resort opened in March, and both the hotel expansion at Potawatomi Hotel and Casino in Milwaukee, WI and Cedar Lakes Casino Hotel in Cass Lake, MN opened in August. The new hotel at Saganing Eagles Landing Casino opened in September. October 2019 saw major hotel project completions at Seminole Hard Rock Hotel & Casino Hollywood and Seminole Hard Rock Hotel

Table 2

Indian Casinos with Hotels – Summary by Size*
(As of December 31, 2019)

Range of Rooms	Casinos* with Hotels	Average No. Gaming Positions	Average No. Hotel Rooms	Positions Per Hotel Room
< 100 Rooms	65	500	56	8.9
100 < 200 Rooms	61	1,137	135	8.4
200 < 300 Rooms	29	1,711	231	7.4
300 < 400 Rooms	16	1,856	338	5.5
400 < 500 Rooms	14	2,194	434	5.1
500 < 1,000 Rooms	19	2,809	670	4.2
1,000 or more Rooms	9	5,096	1,386	3.7
Total/Average	213	1,461	259	5.6

* There are dozens of Indian casinos with more than one hotel/lodging property - Accordingly, the actual number of individual hotels is greater.

Source: KlasRobinson Q.E.D.

Anticipated in 2021 are three new Indian casino hotels and another four hotel expansions at existing Indian casinos to commence operations, adding over 3,000 rooms combined.

During 2022, another eight new Indian casino hotels and four other hotel expansions at existing Indian casinos are projected to commence operations, adding over 2,500 more hotel rooms.

The number of Indian casinos with hotels varies significantly by number of rooms per property. Table 2 (previous page) presents a summary of Indian casinos with hotels by size segment. It is important to note that these ranges are based on averages and do not take into consideration the characteristics, which are unique to any specific competitive market, or restrictions on the types and/or numbers of gaming devices determined by individual compacts. At the same time, the ranges do provide a reasonable “rule of thumb” for comparative purposes.

Of the 213 Indian casinos with hotels in operation by the end of 2019, the largest segment by size are those with less than 100 rooms (65 properties) and those with between 100 and less than 200 rooms (61 properties). With respect to the number of gaming positions per hotel room by size segment, the ratio ranges from 3.7 to 8.9, with the general pattern being smaller properties with higher ratios, larger properties with smaller ratios - the average overall ratio of gaming positions per hotel room being 5.6 gaming positions per hotel room.

Not only do hotels at Indian casinos vary significantly in size,

but also by facilities and amenities. Table 3 (following page) presents a summary of facilities and amenities by room count range at Indian casinos with hotels.

With the exception of hotels at Indian casinos with less than 100 rooms, all properties have meeting and function space – with almost three in four (74 percent) also having business centers. Approximately one in three (33 percent) of Indian casinos with hotels have a golf course. One in three Indian casinos with hotels have a spa or spa/salon with several properties having stand-alone salons. Approximately half (50 percent) of Indian casinos with hotels have indoor pools, over 40 percent have outdoor pools, and 70 percent have jacuzzis/hot tubs, with almost one out of four (23.5 percent) having waterpark/water features (i.e. lazy rivers, swim-up bars, tanning pools, infinity pools, splash pads, etc.) More than one in three have saunas while over one in five have steam rooms – albeit stand-alone or located at the property’s spa. Approximately 87 percent of Indian casinos with hotels have a fitness center/workout room. Two in five Indian casinos with a hotel have a non-gaming arcade, with more than one in ten having a bowling center and/or on-site childcare.

With respect to trends in facilities and amenities at Indian casinos with hotels, electric car chargers (EV) are now available at almost one out of three properties (32 percent). Ten years ago, such an amenity was considered at best a novelty. Today, electric vehicle charging stations are popping up at Indian casinos around the country. Several enterprising properties have utilized un-occupied RV sites with electrical hook ups to accommodate electric vehicle charging needs, albeit not high-speed. It is important to note, not all car charging stations are created equal – the type of vehicle accommodated and charging speed can vary greatly. Know the needs of your customer.

Not just in-room Wi-Fi, but “free” in-room Wi-Fi is becoming increasingly common at Indian casinos with hotels – well over 90 percent of all properties advertise free in-room Wi-Fi (although it requires an overnight stay and is often included as part of the resort fee). A decade ago, less than 50 percent of hotels at Indian casinos offered high-speed internet at all.

The number of hotels at Indian casinos with stocked mini-bars have decreased by more than half over the past 10 years, from 11 percent to less than 5 percent, giving way to an increase in the number of in-room mini-fridges (55 percent) and microwave ovens (22.5 percent). Reduction in labor costs, changing dietary needs and customer expenditure preferences have all contributed to this shift.

“Pet friendly” is also becoming increasingly common at hotels – stand-alone or casino-affiliated. Not only do these properties allow guests to bring their pets, such hotels may also provide pet-specific amenities such as water bowls, food dishes, dog runs and/or outdoor play areas. In addition to better accommodating overnight guests and a means of differentiation, such hotels may charge a pet-specific room deposit (sometimes non-refundable) and/or additional pet fees for

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Table 3

Hotel Service and Amenity Summary

Room Range Category	< 100	100 < 200	200 < 300	300 < 400	400 < 500	500 < 1,000	1,000 or More	Total
Meeting Space	76.9%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	93.0%
Business Center	50.8%	75.4%	75.9%	100.0%	100.0%	94.7%	100.0%	74.2%
Wedding Chapel/Gazebo	0.0%	6.6%	10.3%	6.3%	14.3%	0.0%	11.1%	5.2%
Golf Course	7.7%	26.2%	48.3%	50.0%	57.1%	63.2%	77.8%	32.9%
Golf Simulator/Suite	0.0%	3.3%	13.8%	0.0%	7.1%	26.3%	44.4%	7.5%
Spa	3.1%	13.1%	37.9%	75.0%	78.6%	89.5%	100.0%	32.9%
Salon	1.5%	9.8%	27.6%	50.0%	35.7%	63.2%	77.8%	22.1%
Indoor Pool	36.9%	55.7%	55.2%	56.3%	50.0%	63.2%	44.4%	49.8%
Outdoor Pool	26.2%	36.1%	58.6%	43.8%	64.3%	57.9%	100.0%	43.2%
Jacuzzi/Hot Tub	43.1%	73.8%	79.3%	87.5%	85.7%	94.7%	100.0%	70.0%
Waterpark/Water Features	6.2%	19.7%	17.2%	43.8%	28.6%	68.4%	55.6%	23.5%
Sauna	13.8%	23.0%	44.8%	87.5%	57.1%	57.9%	88.9%	36.2%
Steam Room	1.5%	8.2%	27.6%	50.0%	42.9%	57.9%	88.9%	22.1%
Fitness Center	64.6%	95.1%	96.6%	100.0%	92.9%	100.0%	100.0%	86.9%
Tennis	0.0%	0.0%	0.0%	0.0%	14.3%	10.5%	11.1%	2.3%
Arcade	12.3%	45.9%	41.4%	75.0%	50.0%	73.7%	44.4%	39.9%
Bowling	4.6%	9.8%	10.3%	31.3%	7.1%	31.6%	22.2%	12.2%
Childcare	0.0%	4.9%	13.8%	18.8%	21.4%	57.9%	22.2%	12.2%
Movie Theater	0.0%	0.0%	10.3%	12.5%	7.1%	21.1%	0.0%	4.7%
RV park	33.8%	44.3%	48.3%	56.3%	21.4%	52.6%	22.2%	40.8%
Gas Station	60.0%	72.1%	65.5%	81.3%	71.4%	78.9%	77.8%	69.0%
Marina	13.8%	18.0%	13.8%	0.0%	7.1%	15.8%	0.0%	13.1%
Concierge	3.1%	24.6%	55.2%	75.0%	64.3%	78.9%	77.8%	35.7%
Valet parking	21.5%	59.0%	86.2%	100.0%	100.0%	94.7%	100.0%	62.0%
Airport Shuttle	6.2%	18.0%	24.1%	37.5%	21.4%	36.8%	22.2%	18.8%
Electric Car Charger (EV)	12.3%	19.7%	37.9%	62.5%	50.0%	78.9%	66.7%	32.4%
Gift Shop/Retail	63.1%	93.4%	100.0%	100.0%	100.0%	100.0%	100.0%	86.9%
Free Wi-Fi	86.2%	100.0%	100.0%	93.8%	92.9%	100.0%	77.8%	93.9%
Mini-Bar	0.0%	0.0%	0.0%	6.3%	0.0%	15.8%	55.6%	4.2%
Mini-Fridge	50.8%	60.7%	62.1%	62.5%	35.7%	42.1%	66.7%	54.9%
Microwave	32.3%	32.8%	17.2%	6.3%	7.1%	0.0%	0.0%	22.5%
Room Service	20.0%	42.6%	69.0%	93.8%	78.6%	94.7%	100.0%	52.6%
Dry Cleaning	9.2%	32.8%	41.4%	62.5%	78.6%	73.7%	100.0%	38.5%
Laundry Service	27.7%	70.5%	51.7%	68.8%	64.3%	78.9%	100.0%	56.3%
Pet Friendly Hotel	33.8%	27.9%	27.6%	18.8%	14.3%	42.1%	44.4%	30.0%
Direct Online Booking	72.3%	96.7%	93.1%	93.8%	92.9%	100.0%	100.0%	88.7%

Source: KlasRobinson Q.E.D.

such services, thus creating a new potential source of revenue.

As competition for overnight casino patrons grows, so does the need to anticipate and to accommodate the requests and requirements of your hotel guests. Customer service, combined with the proper mix of facilities and amenities for your clientele, are essential to a property's success. ♣

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