



Non-Gaming Hotels in Indian Country - 2024

by Matthew S. Robinson

As of July 1, 2024, there were an estimated 90 non-gaming hotels with a total 11,315 rooms owned by more than 50 different tribes and tribal entities (development corporations, partnerships, etc.). These include small lodges in some of the most remote areas of the country to full-service hotels in major U.S. metropolitan areas – and pretty much everything in between. Not included are the more than 60,000 hotel rooms affiliated with Indian casinos in the country. Also not included are hotel properties owned by individual tribal members, passive minority equity investments by tribes or tribally-owned hotel franchise corporations. Table 1 presents a summary of tribally-owned, non-gaming hotels in the U.S. by size.

The 90 tribally-owned, non-gaming hotel properties range in size from three rooms up to more than 600 rooms, with an average (mean) of 125.7 rooms and median of 90.5 rooms per property. By size, hotel properties with less than 50 rooms account for the greatest number of hotel properties (27.8 percent), followed closely by hotel properties with 50 < 100 rooms and 100 < 200 rooms, each accounting for 25.6 percent of tribally-owned, non-gaming hotel properties.

As presented in Table 2, the 90 tribally-owned, non-gaming hotel properties are located in 17 different states. These include: 15 properties each in Arizona and California; 12 properties in Alaska; eight properties in Florida; seven properties each in Minnesota and Washington; six properties in New Mexico; five properties in Alabama; four properties in Oklahoma; three properties in Michigan; two

properties in New York; and one hotel property each in Connecticut, Washington D.C., Mississippi, North Carolina,

Table 1

Non-Gaming Tribally-Owned Hotels – Summary by Size (As of July 1, 2024)

Range of Rooms	Total		Rooms Per Property			
	Properties	Rooms	Low	High	Average	Median
< 50 Rooms	25	524	3	44	21.0	17.0
50 < 100 Rooms	23	1,729	52	96	75.2	74.0
100 < 200 Rooms	23	3,061	100	182	133.1	127.0
200 < 300 Rooms	12	2,987	202	297	248.9	247.0
300 or more Rooms	7	3,014	342	614	430.6	400.0
Total	90	11,315	3	614	125.7	90.5

Source: KlasRobinson Q.E.D.

Table 2

Non-Gaming Tribally-Owned Hotels – Summary by Location (As of July 1, 2024)

State	Properties	Rooms	State	Properties	Rooms
Alabama	5	519	Mississippi	1	140
Alaska	12	588	New Mexico	6	734
Arizona	15	1,654	New York	2	79
California	15	1,723	North Carolina	1	180
Connecticut	1	104	Oklahoma	4	375
District of Columbia	1	202	Oregon	1	30
Florida	8	1,706	Virginia	1	150
Michigan	3	898	Washington	7	818
Minnesota	7	1,415	Total	90	11,315

Source: KlasRobinson Q.E.D.

Oregon and Virginia.

Not only do tribally-owned, non-gaming hotel properties vary by size and location, but by affiliation. Of the 90 tribally-owned, non-gaming hotel properties, 39 hotels (43.3 percent of properties and 68.4 percent of total rooms) carry a national or regional franchise, while 51 hotels (56.7 percent of properties and 31.6 percent of total rooms) are independent with no brand or chain affiliation.

As presented in Table 3, Marriott branded properties account for 43.6 percent of total branded and 18.9 percent of total tribally-owned, non-gaming properties. Tribally-owned Marriott branded properties include Courtyard by Marriott (1 property), Fairfield Inn & Suites (3 properties), JW Marriott (1 property), Marriott AC (1 property), Autograph Collection (1 property), Luxury Collection (1 property), Residence Inn & Suites (4 properties), Sheraton (1 property), TownPlace Suites (3 properties) and Westin (1 property). Hilton branded properties account for 28.2 percent of total branded and 12.2 percent of total tribally-owned, non-gaming properties. Tribally-owned Hilton branded properties include Doubletree (2 properties), Embassy Suites (1 property), Hilton Garden Inn (2 properties), Home2 Suites (2 properties), Homewood Suites (1 property), Tapestry Collection (1 property), Tru (1 property) and Waldorf Astoria (1 property). InterContinental (IHG) branded properties account for 12.8 percent of total branded and 5.6 percent of total tribally-owned, non-gaming properties. Tribally-owned IHG branded properties include Holiday Inn Express (2 properties), Holiday Inn Resort (1 property), Intercontinental (1 property) and Staybridge Suites (1 property). In addition, there are two Hyatt-branded properties – Hyatt Place (1 property) and Hyatt Regency (1 property), as well as one Best Western branded property (Best Western Plus), one Coast Hotel branded property, one Choice branded property (Quality Inn) and one Great Wolf Lodge.

Table 3

Non-Gaming Tribally-Owned Hotels – Summary by Brand/Affiliation
(As of July 1, 2024)

Brand/Affiliation	Total		Rooms Per Property			
	Properties	Rooms	Low	High	Average	Median
Marriott International	17	3,339	83	500	196.4	158.0
Hilton Hotels & Resorts	11	2,299	74	400	209.0	229.0
InterContinental Hotels Group	5	862	80	410	172.4	112.0
Hyatt Hotels Corporation	2	477	127	350	238.5	238.5
Other Brand/Affiliation*	4	768	56	398	192.0	157.0
Sub-Total	39	7,745	56	500	198.6	173.0
Non-Affiliation	Properties	Rooms	Low	High	Average	Median
Independent	51	3,570	3	614	70.0	52.0
Total	90	11,315	3	614	125.7	90.5

*Other affiliations/brands/franchises include Great Wolf Lodge, Best Western International, Choice Hotels International and Coast Hotels

Source: KlasRobinson Q.E.D.

In addition to owning a hotel or hotels with a national brand or chain affiliation, what about owning the hotel brand itself? The Seminole Tribe of Florida did just that. In 2007, the Seminole Tribe of Florida acquired the Hard Rock brand. Today, the Seminole Tribe of Florida, through its Hard Rock International, has more than 250 Hard Rock branded Café, Hotel, Casino, Live and Rock Shop venues in 70 different countries, including five non-gaming Hard Rock Hotel franchises here in the U.S.

As tribes continue to grow their economies, the development and/or purchase of non-gaming hotels and related hospitality enterprises will continue to provide a viable option for diversification, particularly for those with existing casino hotel operations. ♣

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