



Golf in Indian Country – 2025

by Matthew S. Robinson

There are currently 77 tribes with 88 golf facilities, 116 golf courses and a total of 1,854 holes. Following significant growth from 2004 to 2009 and again from 2009 to 2014 – much of it coinciding with the expansion of Indian gaming, resort development, and related amenities – the growth in tribally-owned golf facilities, courses, and holes moderated between 2014 and 2019. With the onset of Covid in Spring 2020 and the subsequent supply chain delays, the past five-year period (2019 to 2024) has seen a shake-up in the tribally-owned golf sector, with tribes both purchasing and selling

courses, as well as some repurposing of existing courses themselves. At the same time, golf – as a “safe” outdoor recreational activity – has enjoyed a resurgence in popularity. Table 1 presents a historic summary of tribally-owned golf facilities

Table 1 **Tribally-Owned Golf Facilities – Historic Growth**
(For Calendar Years ending 12/31)

Period	% Change		% Change		% Change		% Change		2004
	2024	(2019-2024)	2019	(2014-2019)	2014	(2009-2014)	2009	(2004-2009)	
Tribes	77	2.7%	75	10.3%	68	47.8%	46	39.4%	33
Facilities	88	3.5%	85	13.3%	75	50.0%	50	42.9%	35
Courses	116	1.8%	114	12.9%	101	46.4%	69	32.7%	52
Holes	1,854	1.0%	1,836	12.7%	1,629	48.4%	1,098	40.2%	783

Source: KlasRobinson Q.E.D.

Table 2 **Tribally-Owned Golf Facilities by State**
(For Calendar Years ending 12/31)

State	Tribes	Facilities	Courses	Holes
Alabama	1	1	1	18
Arizona	7	9	12	216
California	14	15	21	333
Connecticut	2	2	3	54
Florida	1	1	3	27
Idaho	2	2	2	36
Kansas	1	1	1	18
Louisiana	2	2	2	36
Michigan	5	6	8	144
Minnesota	6	6	6	108
Mississippi	1	1	2	36
Montana	1	1	1	9
Nebraska	1	1	1	18
Nevada	2	3	5	90
New Mexico	7	8	14	171
New York	2	4	6	90
North Carolina	1	1	1	18
North Dakota	1	1	1	18
Oklahoma	5	7	9	126
Oregon	3	4	4	72
South Dakota	1	1	1	9
Washington	8	8	8	144
Wisconsin	3	3	4	63
Total	77	88	116	1,854

Source: KlasRobinson Q.E.D.

for the past two decades.

Today, tribally-owned golf facilities are located in 23 different states. By total number of golf holes, California ranks first, with 14 tribes owning 15 facilities and 21 courses totaling 333 holes; followed by Arizona, where seven tribes own nine golf facilities and 12 courses with 216 holes; and neighboring New Mexico, where seven tribes own eight golf facilities and 14 courses with 171 holes. At the same time, Washington actually has more tribes that own golf facilities than either Arizona or New Mexico. However, each of the Washington tribes with golf have only one golf facility and one course per tribe – eight tribes, eight facilities and eight courses with a total of 144 holes. Table 2 presents a summary of tribally-owned golf facilities by state.

Of the 88 tribally-owned golf facilities, 79 are casino-affiliated with a total of 103 courses and 1,647 holes, while nine of the tribally-owned golf facilities are stand-alone (no casino affiliation) with a total of 13 courses and 207 holes. Three tribes own both casino-affiliated and stand-alone golf facilities. Table 3 presents a summary of tribally-owned casino-affiliated and stand-alone golf facilities.

Greens fees at tribally-owned casino-affiliated courses range from \$12 to \$100 for nine holes and \$20 to \$399

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for 18 holes. Greens fees at tribally-owned stand-alone courses range from \$20 to \$100 for nine holes and \$35 to \$289 for 18 holes. Overall, the average (mean) greens fee is \$61 for nine holes and \$116 for 18 holes.

With respect to tribally-owned casino-affiliated golf facilities, 66 of the golf courses were built while 37 were purchased. Popular golf course designers for the built courses include Coore & Crenshaw, Bill Phillips, Gary Panks, Rees Jones, Trent Jones, Ken Killian, Albanese & Lutzke, Hale Irwin, Tom Fazio and Notah Begay III. With respect to purchased courses, distances between the golf facility and its affiliated Indian casino ranges from adjacent to almost a 25-mile drive, with an average (mean) of 6.5-mile drive and median of 3.6-mile drive.

There are a significant number of tribally-owned casino-affiliated facilities with limited, if any, casino webpage advertising, let alone “stay and play” packaging and/or online booking. In the case of a casino, particularly those with on-site lodging and conference space, a golf course can and should be a marketing tool and means of differentiation for the gaming operation. A casino-affiliated golf course can not only increase the length of stay at a property (an additional occupied roomnight can generate anywhere from \$150 to \$600 in incremental gaming revenue), but can also be a major draw, and often requirement, for conference and convention demand (i.e. conference/corporate golf tournaments). For those casino hotel properties that do not utilize their affiliated golf course facilities accordingly, there is likely a good amount of “green” being left on the table.

A recent trend is the introduction of golf simulator venues at Indian casinos, with or without affiliated golf course facilities. While several of the tribally-owned courses feature golf simulators as a part of their golf course instructional offerings, there are currently 16 Indian casinos with golf

simulator venues, including six that have affiliated golf courses. While the earliest simulator versions were limited to golf on a single virtual course, the newer products enable guests to play simulated golf on courses around the world – including that tribe’s course. The golf simulator venues feature two to four bays and often include sitting areas with food and beverage service. Hourly rates range from \$30 to \$60 per hour per bay with a premium on weekends. Golf simulators have also expanded to include other sports-related games (hockey, baseball, football, soccer, etc.), as well as an expanding library of non-sports games. These bays can also be rented for watch parties for sports and other events.

With the introduction of golf simulator venues, golf can now be available at any Indian casino, whether it be a full-scale destination resort or a smaller “locals” gaming operation. Golf, in any form, may or may not be the right fit for your property. However, it does provide an opportunity to diversify the casino’s offerings, potentially attracting new clientele. Like it or not, golf is here to stay. ♣

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Table 3 Tribally-Owned Casino-Affiliated vs. Stand-Alone Golf Facilities
(For Calendar Year 12/31/2024)

Casino vs. Non-Casino	Tribes*	Facilities	Courses	Holes	Greens Fees	
					9 Holes	18 Holes
Casino-Affiliated	71	79	103	1,647	\$12 - \$100	\$20 - \$399
Stand-Alone	9	9	13	207	\$20 - \$100	\$35 - \$289
Total / Average	77	88	116	1,854	\$61.00	\$116.00

* 3 Tribes own and operate both Casino-Affiliated and Stand-Alone golf facilities

Source: KlasRobinson Q.E.D.