



## Spas at Indian Casinos - 2010 Update

by Matthew S. Robinson

As more and more Indian casinos expand their facilities and amenities to create destination properties, spas have become an increasingly more common component at tribal gaming resort developments throughout the country. Over the past five years, the number of spas at Indian casinos has almost tripled. Based on the March 2010 survey conducted by KlasRobinson Q.E.D., there are an estimated 50 spas at Indian casino resorts in 17 different states. The following table presents a summary of spas at Indian casinos by state.

As presented below, California has the greatest number of Indian casinos with spas (12 spas), followed by Washington state (six spas), Minnesota and New Mexico (four spas each), Connecticut, Michigan and New York (three spas each), Arizona, Florida, Idaho, Oklahoma and Oregon (two spas each) and Alabama, Colorado, Iowa, Louisiana, Mississippi (each with one spa). With respect to size, spas at Indian casinos range from as little as 500 sq. ft. up to 33,000 sq. ft., with an overall average of approximately 8,428 sq. ft. By state, the largest average spa size is Connecticut with an average of 21,000 sq. ft. per spa (below). The largest individual spa at an Indian casino is Skana, The Spa at Turning Stone in New York at 33,000 sq. ft.

It is important to note the spa square footage is not necessarily the most accurate measure of size. Many spas include their fitness centers, indoor pool areas, reception areas and other facilities and amenities in their estimates of total spa square footage. A more accurate measurement may be the number of individual treatment rooms per spa.

The number of treatment rooms at Indian casino spas range from one individual treatment room to as many as 23 treatment rooms, with an average of 7.7 treatment rooms per spa. By state, the greatest number of average treatment rooms per spa is also Connecticut, The Grand Spa at Foxwoods (20,000 sq. ft./11 treatment rooms), G Spa at MGM Grand at Foxwoods (21,000 sq. ft./12 treatment rooms), and Elemis Spa at Mohegan Sun (22,000 sq. ft./18 treatment rooms). The Indian casino spa with the greatest number of treatment rooms is The Spa at Spa Resort Casino in Palm Springs with 23 treatment rooms. On a per-treatment-room basis, an individual spa treatment room at an Indian casino is approximately 1,100 sq. ft.

The average number of hotel rooms per property at Indian casinos with spas by state ranges from a low of 140

Indian Casino Spa Summary

State	Number of Spas at Indian Casinos	Square Footage			Treatment Rooms			Sq. Ft. Per Treatment Room	Avg. No. Hotel Rooms	Spa Sq. Ft. Per Hotel Room	Hotel Rooms Per Treatment Room
		Low	High	Avg.	Low	High	Avg.				
Alabama	1	11,200	11,200	11,200	8	8	8.0	1,400	236	47.5	29.5
Arizona	2	2,000	17,500	9,750	2	17	9.5	1,026	331	29.5	34.8
California	12	2,250	30,000	8,933	3	23	8.8	1,011	343	26.0	38.9
Colorado	1	1,000	1,000	1,000	2	2	2.0	500	140	7.1	70.0
Connecticut	3	20,000	22,000	21,000	11	18	13.7	1,537	1,306	16.1	95.5
Florida	2	8,000	8,700	8,350	2	4	3.0	2,783	276	30.3	92.0
Iowa	1	3,386	3,386	3,386	5	5	5.0	677	404	8.4	80.8
Idaho	2	750	2,000	1,375	1	3	2.0	688	134	10.3	66.8
Louisiana	1	13,000	13,000	13,000	9	9	9.0	1,444	531	24.5	59.0
Michigan	3	500	7,000	3,833	1	15	7.3	523	513	7.5	69.9
Minnesota	4	500	8,243	3,374	1	6	3.3	1,038	560	6.0	172.3
Mississippi	1	3,000	3,000	3,000	5	5	5.0	600	495	6.1	99.0
New Mexico	4	10,000	16,000	13,500	10	12	10.8	1,256	294	46.0	27.3
New York	3	2,000	33,000	16,667	3	12	9.0	1,852	517	32.3	57.4
Oklahoma	2	1,925	2,750	2,338	4	5	4.5	519	413	5.7	91.7
Oregon	2	4,250	5,000	4,625	7	8	7.5	617	241	19.2	32.1
Washington	6	2,250	14,000	6,292	3	16	8.2	770	187	33.7	22.9
<b>Total/Average</b>	<b>50</b>	<b>500</b>	<b>33,000</b>	<b>8,428</b>	<b>1</b>	<b>23</b>	<b>7.7</b>	<b>1,100</b>	<b>405</b>	<b>20.8</b>	<b>52.9</b>

Source: KlasRobinson Q.E.D.

units in Colorado to a high of 1,306 units in Connecticut, with the average Indian property with a spa having approximately 405 units per hotel on a national basis. On a per-hotel-room basis at Indian casinos with spas, there are approximately 20.8 sq. ft. of spa space per hotel room (i.e., an Indian casino property with 405 rooms on average has a 8,428 sq. ft. spa) or 52.9 hotel rooms per treatment room (i.e., an Indian casino property with 405 rooms on average has 7.7 treatment rooms). It is important to note that these estimates are based on averages of what has already been built in Indian Country, not necessarily “rules of thumb” for future development. Not every Indian casino hotel should have, let alone can support, a spa. Like any type of casino ancillary development, the ability to support a spa depends upon demand specific to an individual property’s market and clientele. To date, there are spas at one in three Indian casinos with a hotel.

Spa growth continues at Indian gaming properties with numerous projects currently under construction. Winding Stream Spa at Meskwaki Bingo Casino Hotel in Iowa is nearing completion of a hair salon addition. Expected to open in mid-April 2010, the 497-unit Talking Stick Resort in Scottsdale will include The Spa at Talking Stick Resort - a 14th floor, 13,000 sq. ft., open-air spa. Expected to open in July 2010, Thunder Valley Casino’s new 297-unit resort development outside of Sacramento will include a spa with over 10,000 sq. ft. Opening in December 2010, the new 161-unit all-suite hotel at Valley View Casino in North San Diego County will include a 5,000 sq. ft. spa. Expected to open June 2011, the expanded Coeur d’Alene Casino Resort Hotel in Idaho will include another 105 hotel rooms and a 15,000 sq. ft. spa. Opening in Fall 2011, the new 215-unit hotel convention center complex at Casino Del Sol in Tucson will include a 3,500 sq. ft. spa and fitness center. Scheduled for completion in 2012, the expanded Harrah’s Cherokee Casino & Hotel in North Carolina will include a 16,000 sq. ft. spa. There are also at least a dozen spa

projects planned at Indian casino properties in almost as many states, with more likely to occur in the near future. ♣

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