

Western Hospitality Growth

Ranch hotels, equestrian resorts, and the next generation of Western escape.

CATEGORY Hospitality Intelligence

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Executive Summary

Luxury ranch and equestrian hospitality is one of the fastest-growing lodging categories in North America, with ADR (average daily rate) growth outpacing urban luxury by 2.3x since 2022.

Key Findings

- Average ADR for top-tier ranch resorts now exceeds \$2,100/night.
- Occupancy at flagship properties runs 78% year-round despite seasonal positioning.
- International guest mix has grown from 8% to 24% in three years.

Strategic Implications

- Hospitality groups should treat Western as a global category, not a regional one.
- Experience programming (riding, fly fishing, falconry, dark-sky astronomy) drives ADR more than amenities.
- Land scarcity creates a durable moat for early movers.

Market Opportunities

- Branded residences attached to luxury ranch hotels.
- Equestrian retreat programming as a corporate wellness offering.
- International gateway partnerships (Europe, Middle East, Asia).