



State of Indian Country Tourism

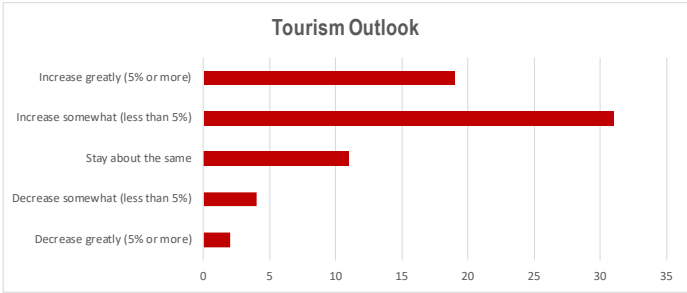
Spring 2019

Indian Country is Upbeat on Tourism for 2019

Nearly 75 percent of respondents indicated they expect tourism revenues to improve greatly or somewhat for the coming year.

Highlights

- Tribal tourism enterprises are remarkably upbeat about tourism prospects, with nearly **75 percent** indicating they believe **tourism will increase** greatly (28%) or somewhat (47%) in the coming year.
- Remaining responses believe tourism will stay the same (16%), decrease somewhat (6%) or decrease greatly (3%).
- One-third (33%) of survey respondents said they felt tourism revenues had improved somewhat in their region last year. An additional 40 percent felt tourism revenues had remained the same.

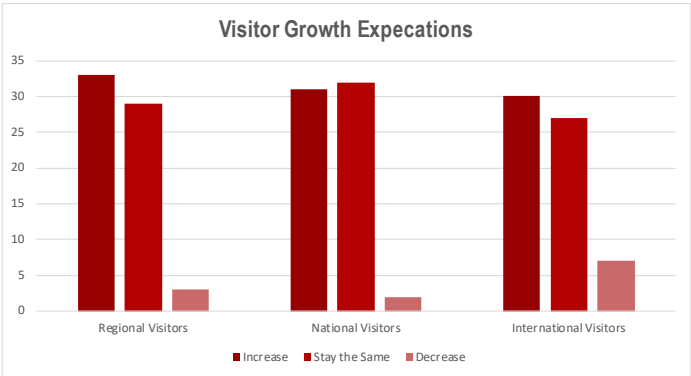


Native American tourism enterprises are extremely upbeat for 2019, with 75 percent of survey respondents anticipating an increase in visitation this year. We believe the optimism is further testament to the fact that visitors are increasingly seeking out authentic experiences when they travel.

Camille Ferguson,
Executive Director, AIANTA

Visitor Growth

- Tourism enterprises generally anticipate the most significant growth in visitation will stem from regional visitors--with **49 percent** anticipating a **growth in regional visitors** and another 43 percent expecting regional visitation to remain the same.
- Some **46 percent anticipate a growth in the overall domestic market**, with an additional 48 percent believing domestic visitation will remain the same.
- Unsurprisingly, respondents who expect tourism revenues to increase significantly also anticipate the largest growth in visitors, including regional visitor growth (89%) and domestic visitor growth (69%).
- Less than half (45%) of overall respondents expect international visitation to increase, while an additional 40 percent expect international visitation to remain the same the coming year. Just 10 percent believe international visitation will decrease.
- Enterprises which responded tourism will “increase greatly” are also the most optimistic about international visitor growth, with **74%** of those respondents indicating that they expect to see **an increase in international visitation**.



International Visitation

- Although tribal tourism enterprises welcome visitors from a variety of international markets, more than one third (34%) indicated **Germany is a top inbound market**. The second-most important markets are China (28%) and Canada (24%).

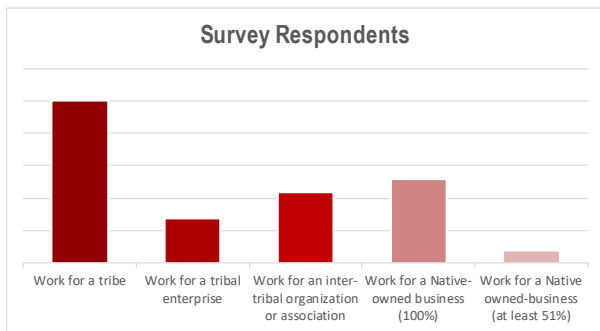


Marketing Matters

- When asked about the most significant challenges facing tribal tourism enterprises, the top responses were: inadequate/underfunded marketing (46%), followed by a lack of coordinated regional tourism efforts (34%) and infrastructure issues (34%).
- In general, tourism entities attribute **increases in visitation to increased marketing efforts** (58%). To a lesser extent growth is attributed to increased political support (18%).
- More than half (54%) of respondents rely upon their state tourism office for tourism data. Local CVBs (23%) are also an important source of data.

Survey Respondents

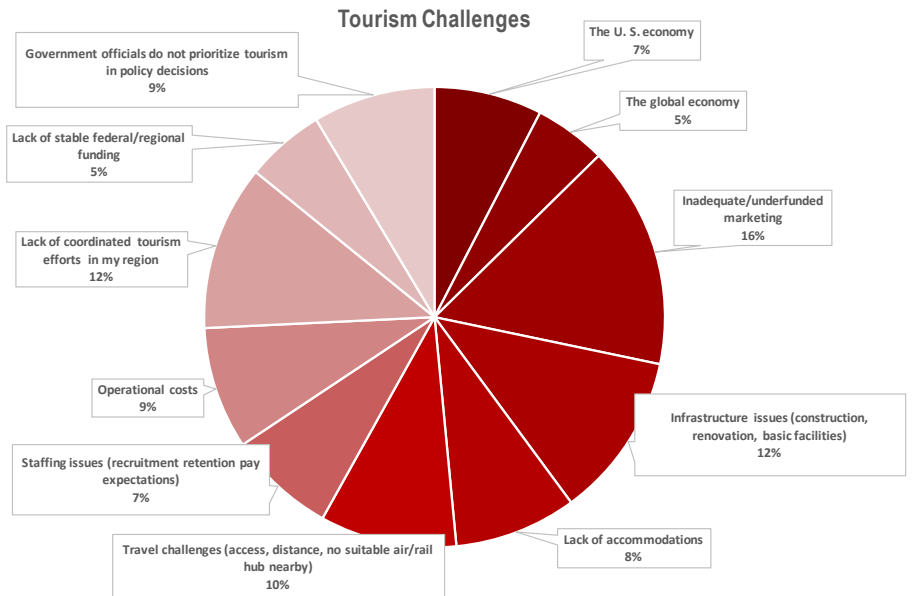
- More than one third of respondents (38%) work for their tribe. Others work for 100% native-owned businesses (19%), inter-tribal organizations (16%) and tribal enterprises (10%).



- While respondents ran the gamut in terms of business type, ranging from casinos to accommodations to food and beverage outlets, the largest number (39%) identified as a **cultural or heritage attraction** (including museums or cultural centers).

Tourism Employment

- Despite the optimism about tourism, just one third (33%) of respondents indicated they expect to increase tourism employment for the coming year.
- Those respondents who expect tourism revenues to increase significantly were also the most optimistic about jobs growth, with **53 percent anticipating an increased work force** for the coming year.
- Work force size varied greatly, with 37 percent of respondents reporting 1-3 full-time employees and an additional 28 percent reporting more than 10 full-time employees.



Methodology

The State of Indian Country Tourism survey results were obtained by querying more than 3,000 tribal tourism enterprises and Native-owned businesses in AIANTA's proprietary database.

About AIANTA

For more than two decades, AIANTA has served as the national center for providing tourism and recreational travel technical assistance, training and capacity building to American Indian nations. AIANTA is a 501(c)(3) national nonprofit association of Native American tribes and tribal businesses and was incorporated in 2002 to advance Indian Country tourism. AIANTA's mission is to define, introduce, grow and sustain American Indian and Alaska Native tourism that honors traditions and values. www.aianta.org.

Image: Courtesy of The Keepers of the Sacred Tradition of Pipemakers