



State of Indian Country Tourism

Spring 2021

Indian Country Anticipates Increase in Tourism for 2021

Image: Courtesy of the Pueblo of Acoma

Nearly 70% of respondents indicated they expect tourism revenues to improve somewhat or greatly for the coming year.

Highlights

- Although more than three-quarters (77%) of respondents indicated tourism weakened greatly over the past year, most respondents also expect a tourism increase in the coming year.
- Nearly half (48%) indicated that **revenue will increase by at least 5%** with an additional 20% indicating tourism revenues will grow by more than 5%.
- 65% believe they will not increase tourism employment in the coming year.
- Respondents, however, **are optimistic that tourism revenues will increase in 2021** with nearly half (48%) indicating that revenue will increase by at least 5% and an additional 20% indicating tourism revenues will grow by more than 5%.

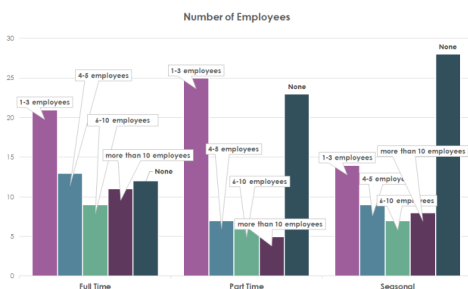
Not unexpectedly, sentiment about the immediate future of tourism in Indian Country is mixed. While most respondents feel there is room to grow, many are predicting a freeze on new tourism industry hiring, which is a concern for the economies of these communities.

Sherry L. Rupert
Chief Executive Officer, AIANTA

Tourism Employment

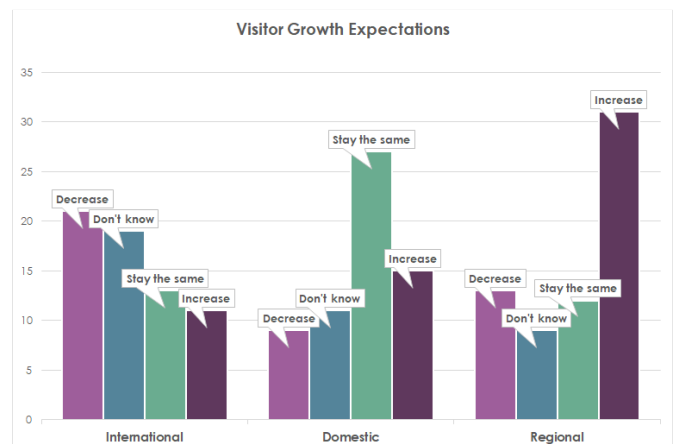
Despite the optimism about tourism, just **one-third (33%) of respondents** indicated they expect to **increase tourism employment** for the coming year.

Additionally, work force sizes vary greatly, with 37% of respondents reporting 1-3 full-time employees and an additional 28% reporting more than 10 full-time employees.

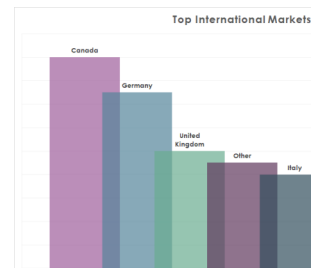


Visitor Growth

- Tourism enterprises generally anticipate the most significant growth will occur in regional visitation --with **48%** anticipating a **growth in regional visitors**.
- **24% anticipate a growth in the overall domestic market**, with an additional 44% indicating domestic visitation will remain the same.
- Only **17% expect international visitation to increase**, while one-third of respondents expect international visitation to decline in the coming year.



International Visitation



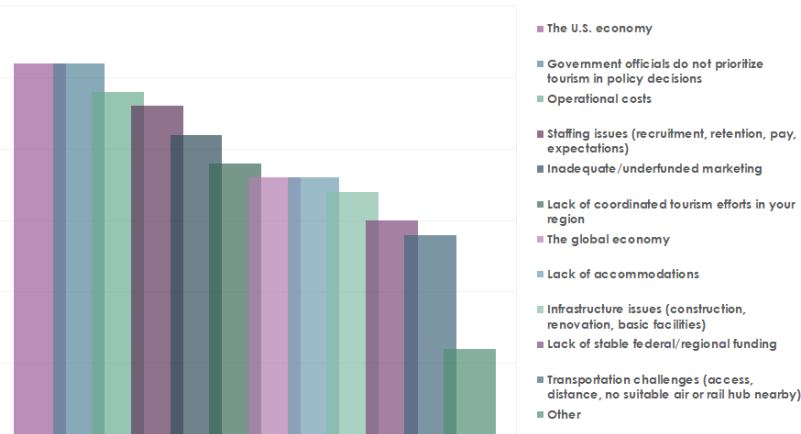
Although tribal tourism enterprises welcome visitors from a variety of international markets, nearly a quarter (24%) indicated **Canada**

is a top inbound market. The second-most important markets are Germany (20%) and the United Kingdom (14%).

Concerns Over the Economy Prevail

- Unsurprisingly, concerns over the economy weigh heavy on respondents minds, with the **U.S. Economy** and **Government Officials Not Prioritizing Tourism** tying for top tourism challenges in the coming year.
- Other top-ranked challenges include Operational Costs, Staffing Issues and Under-funded Marketing.
- More than half (55%) of respondents rely upon their state tourism office or local CVB for tourism data. 14% of respondents indicate they **do not track tourism numbers** at all.

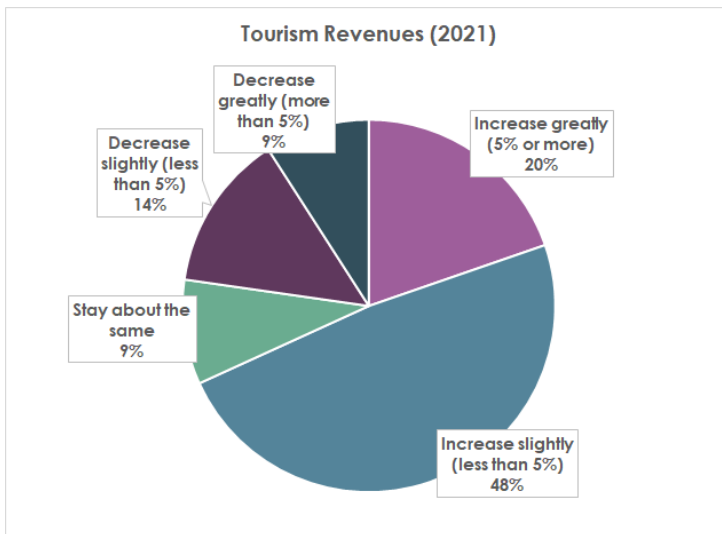
Tourism Challenges



But Also Optimism Over Tourism Revenue

- Nearly 70% of respondents expect **tourism industry revenues to increase** in 2021.
- Nearly half (48%) indicated that **revenue will increase by at least 5%** with an additional 20% indicating tourism revenues will grow by more than 5%.

Tourism Revenues (2021)

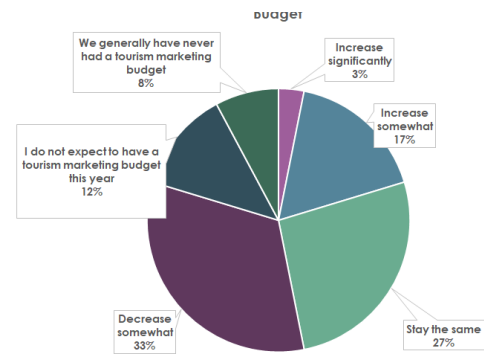


Response to COVID-19

- More than a quarter of respondents (26%) indicated their **tourism business temporarily closed** as a result of the COVID-19 pandemic. Additionally, 20% saw a significant reduction in their tourism marketing budgets.
- There is no consensus as to when respondents expect to see the tourism industry recover, although most expect it to take some time. 23% expect **recovery to occur within six to nine months** while another 23% expect **recovery to take more than a year**.

Tourism Marketing

- One-third of respondents believe their tourism marketing budgets will shrink this year.
- Only 20% expect to see an increase in tourism marketing budget.



Survey Respondents

- Nearly one quarter (22%) of respondents work for a tribe or a Native-owned enterprise (22%).
- While respondents working for hospitality businesses ran the gamut in terms of business type, ranging from casinos to accommodations to food and beverage outlets, nearly one quarter of respondents (22%) identified as a **cultural or heritage attraction**.

Methodology

The **State of Indian Country Tourism Survey** results were obtained by querying more than 3,000 tribal tourism and Native-owned enterprises from AIANTA's proprietary database. Responses were kept anonymous.

About AIANTA

For nearly two decades, the American Indian Alaska Native Tourism Association (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, Alaska Native and Native Hawaiian tourism that honors traditions and values.

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