

2018 Navajo Nation Visitor and Economic Impact Survey

ASU
**Center for
Sustainable
Tourism**
**Arizona State
University**



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Investigators:

Dr. Megha Budruk, PI
Dr. Christine Vogt, Lead Co-PI
Dr. Kathleen Andereck, Co-PI
Dr. Dallen Timothy, Co-PI
Dr. Christine Buzinde, Co-PI
Mr. Thomas Combrink,
Northern Arizona University, Economist

Field / Research Assistants:

Ronald Turner
Cole Fahrenbruch
April Kim
Samantha Nickel
Kim Pham
Chase Perren
Marena Sampson

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Table of Contents

EXECUTIVE SUMMARY	i
INTRODUCTION	1
RESEARCH METHODS	1
POPULATION ESTIMATE	4
VISITOR PROFILE FINDINGS.....	6
Demographic Profile	27
Cluster Analysis	29
Domestic and Foreign Visitors	30
Seasonal Visitors	34
Economic Contribution of Tourism to the Navajo Nation 2018	38
CONCLUSION.....	41
Appendix A: Map of Study Site	43
Appendix B: ASU IRB Approval.....	44
Appendix C: NNHRRB Letter of Support	45
Appendix D: Visitor Survey-Sites.....	47
Appendix E: Visitor Survey-Event.....	55

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EXECUTIVE SUMMARY

To help accomplish the NN's goals through tourism, the Navajo Nation Tourism Department (NNTD) commissioned the Center for Sustainable Tourism at Arizona State University to conduct the 2018 Navajo Nation Visitor and Economic Impact Survey. This was accomplished through funding provided by the Navajo Nation and the Arizona Office of Tourism, with the tribal and rural cooperative tourism program. Its purpose is to present data and analyses of data to examine the role of tourism on the NN, to understand visitors' satisfaction with the NN tourism product(s), to estimate visitor population counts, and to assess the economic impact of tourism on the NN. The results of this study represent tourism only in the portions of the Nation located in the state of Arizona, not in other states (New Mexico, Utah). The economic impact analysis is particularly focused on trip spending only in Arizona and while on the Nation.

An eight-month intercept survey of visitors at 13 sites on the Nation were implemented by ASU surveyors using an eight-page survey held on a clipboard. The sampling and travel to the Nation by ASU staff were around three clusters of sites. Trips were at least three days long and surveying at a site ranged from 3 to 8 hours. The 13 sites were organized into three geographic clusters.

Cluster 1	Cluster 2	Cluster 3
Little Colorado Overlook-Cameron (AZ)	Monument Valley visitor center (AZ)	Holiday Inn - Chinle (AZ)
The Interactive Museum – Tuba City (AZ)	Monument Valley - The View (AZ)	Thunderbird Lodge Chinle (AZ)
Quality Inn – Tuba City (AZ)	Navajo National Monument (AZ)	Hubbell Trading Post NHS (AZ)
Antelope Canyon Fee Station - Page (AZ)	Four Corners Navajo Tribal Park (AZ)	Navajo Nation Museum – Window Rock (AZ)
Antelope Marina		Canyon de Chelly NM (AZ)

A total of 1,062 surveys were completed by visitors from March 2018 to October 2018, yielding a 79% response rate. Additionally, surveying was conducted by ASU at the fall Western Navajo Fair in Tuba City where 160 completed surveys were collected from festival attendees, yielding a 41% response rate.

Key findings from the study include:

- People from many walks of life and origin regions visit the Navajo Nation. Three quarters of the study participants are residents of the United States, with one quarter visiting from abroad, particularly from Germany, France, Italy and Canada. The average age of visitors is 47; 55% of study participants were males, while 45% were females. The NN market is relatively affluent and highly educated.
- Just over half (54%) of study respondents were first-time visitors to the Navajo Nation, although this varied by cluster, with the majority of Cluster 3 visitors and event

attendees having been before. For all three clusters, visiting NN was not their primary purpose of travel, although it was for event attendees, most of whom had come to NN specifically to attend the event. Day visitors spent on average 4.4 hours, while overnight visitors spent on average 2.1 nights. Overnight travelers utilized a range of lodging options, with hotels/motels being the primary accommodation type, followed by campgrounds and private residences.

- Relatively few people visited NN on an organized package tour (7%), and the average group size was 3.7. Most people utilized rented vehicles or their own vehicles, with the majority of rentals originating in Las Vegas and Phoenix.
- NN visitors sought travel information from a wide variety of sources, although the most prevalent sources were friends and family members, guidebooks, the National Park Service, various online sources, and tourist information centers.
- Participants noted an interest in visiting many different localities on NN and being motivated primarily by several main motives. The most popular reasons given for visiting NN were to sightsee, visit new cultural and natural places, get away from everyday life, and spend time with family and friends. Sightseeing was the main leisure pursuit, followed by visiting parks, photography and hiking/walking.
- The most visited or planned to visit locations on NN were Monument Valley Tribal Park, the Four Corners Monument, Antelope Canyon, and Canyon de Chelly National Monument. While these were the most desirable sites, visitors expressed strong interest in visiting all sites identified on NN. Overall, there was a high level of awareness of attractions on the NN, although several stood out more than others, especially Four Corners, Monument Valley, and Antelope Canyon.
- Visitors expressed a high level of satisfaction with their visits, particularly as regards the attractions on NN, friendliness of the people and a sense of safety. The least satisfying aspects of their visits were restaurant quality and domestic animal control. Value for money and overall experience were rated highly, as was the authenticity of Navajo culture.
- The large majority (88%) would like to return to NN in the future, although nearly half (47%) said they would not, owing largely to the significant distance from their homes. Almost all visitors (98%) said they would recommend a visit to NN to other potential travelers.
- Total expenditures for an estimated 2 million visitors to the Navajo Nation over eight-months in 2018 is \$212 million, of which \$110.9 million are from day visitors and \$101.1 are from overnight visitors. In 2011, \$112 million was estimated for a twelve-month period for fewer visitors but a higher proportion of overnight visitors were included. Slightly different measurement of day and overnight was used in the 2018 to be more precise in tourism that can be directly linked to the reservation and not other nearby non-native communities. Overall, the results of this study suggest that there has been significant economic growth in the tourism economy of the Navajo Nation.

Research completed by the Center for Sustainable Tourism, ASU. Report submitted February, 2019.

INTRODUCTION

The Navajo Nation (NN) is rich in vast natural and cultural assets that appeal to domestic and international visitors. People from all over the world visit the NN as their primary destination or in conjunction with visits to other areas in the US Southwest, such as the Grand Canyon, southern Utah, northwest New Mexico, southwest Colorado, Phoenix or Las Vegas. Tourism is an important part of the NN's growing economy, and the tribal community has significant potential to increase visitation and expenditures on the reservation. However, to capitalize on this potential, data are necessary to understand the current tourism situation in the NN and its economic impacts. The NN desires to promote tourism to the reservation as a tool for social and economic development, not at the loss of values and traditions or environmental quality.

To help accomplish the NN's goals through tourism, the Navajo Nation Tourism Department (NNTD) commissioned the Center for Sustainable Tourism at Arizona State University to conduct the 2018 Navajo Nation Visitor and Economic Impact Survey. This was accomplished through funding provided by the Navajo Nation and the Arizona Office of Tourism, with the tribal and rural cooperative tourism program.

This report presents the findings of the study conducted under the cooperative agreement between ASU, the Navajo Nation, and the Arizona Office of Tourism. Its purpose is to present data and analyses of data to examine the role of tourism on the NN, to understand visitors' satisfaction with the NN tourism product(s), to estimate visitor population counts, and to assess the economic impact of tourism on the NN. The results of this study represent tourism in the state of Arizona and not other states (New Mexico, Utah) where the Nation also is located. The economic impact analysis is particularly focused on trip spending only in Arizona and while on the Nation. Efforts were made to validate overnight stays that occurred on the Nation and not in the general region.

RESEARCH METHODS

The goal of this 2018 study was to gain information about visitors to the Navajo Nation and update the findings of the 2011 Navajo Nation Visitor and Economic Impact Study conducted by Northern Arizona University. The current study was designed to obtain consistent and comparable visitor data for Navajo Nation communities, historic sites, parks and recreation areas, other localities, and an event selected by the Navajo Nation Tourism Department (NNTD). To this end, the Center for Sustainable Tourism (CST) at Arizona State University (ASU), in conjunction with the Arizona Office of Tourism (AOT), Corrine Jymm, Public Information Officer, and Arval McCabe, Department Manager of the Navajo Nation Tourism Department, selected data collection sites and developed a survey instrument that was consistent with standard survey categories and aligned with the 2011 instrument.

The CST worked with AOT and the Navajo Nation Tourism Department to define the collection points on the Navajo Nation and the places tourists are most likely to visit. These sites were restricted to 13 locations in the Arizona section of the Navajo Nation and captured a wide cross-section of visitors at various communities and entry points. These 13 locations were further grouped into three geographically defined clusters that allowed for region-wide sampling and comparisons. Additionally, one event—the Western Navajo Fair—was included in the study. Although the Event occurred in Cluster 3, data from the Event was treated as a separate category in order to provide in-depth information regarding the visitor experience and spending at an event on the NN.

The survey instrument was based on the 2011 Navajo Nation visitor survey but also included additional questions. This allowed for the comparability of data, benchmarking and trend analyses, while providing additional new data. The eight-page, self-administered survey included questions on visitors' origins, demographics, activities in the area, attractions visited, reasons for visiting, travel patterns, information sources, and expenditures made in the various communities. Additional questions included visitors' awareness and observations of the Navajo Nation protocol for visitor behavior.

A shortened two-page survey instrument was developed from the longer questionnaire and included questions about visitors' origins, demographics, attractions visited, reasons for visiting, travel patterns, information sources, and expenditures made in the various communities. This shortened version was administered to visitors on-site at the Western Navajo Fair (copies of the on-site and event survey instrument are included in the Appendix of this report). Once finalized, ASU's Institutional Review Board and the Navajo Nation Human Research Review Board (NNHRRB) approved the study and survey instruments. Additionally, the US National Park Service granted permission to survey at relevant NPS locations (OMB # 1024-0236).

A hard copy of the survey was administered at the identified locations between March 15 and October 31, 2018, according to a seasonally-adjusted stratified sample based on historic visitation patterns. The collection schedule was randomized as much as possible to ensure that surveys were distributed on both weekdays and weekends during the spring, summer and fall seasons of 2018. This strategy resulted in six multi-day trips each to Cluster 1 and 2 (see Table 1), and eight multi-day trips to Cluster 3 respectively.

During each trip, a trained ASU surveyor approached an individual at random or an individual in a group at the survey site and screened them by asking if he/she was a visitor to the Navajo Nation. If the individual was a visitor, the surveyor explained the study and invited the person to participate in the study by completing the survey. If the individual refused to participate, the surveyor thanked him/her and a non-response was recorded. If an individual agreed to participate, the surveyor handed her/him a questionnaire, which the visitor then completed. A similar procedure was followed at the Western Navajo Fair. In that instance, four trained surveyors administered surveys to visitors over the three-day period of the fair (October 12 – 14, 2018). Surveyors approached visitors at various sub-events to be able to reach a cross-section of fair visitors. Table 1 describes the targeted number of surveys by site, cluster and

event. Additionally, Table 1 reports the actual number of visitor contacts by ASU surveyors, and the number of usable surveys by site, cluster and event. The response rate indicates the percent of respondents of those contacted who agreed to complete a survey. The final column, indicates the percent of the targeted number of surveys that were completed. When targets were achieved (most because of a steady flow of visitors and high acceptance to participate), later trips aimed to improve completion rates at other locations.

Table 1. Target, Visitor Contacts, Usable, Response Rate and % of Target Completed

	Target	Visitor Contacts	Usable	Response Rate %	% of Target Completed
Cluster 1 (6 trips)					
Little Colorado Overlook- Cameron (AZ)	50	169	92	54	Completed
The Interactive Museum – Tuba City (AZ)	50	13	5	39	10
Quality Inn – Tuba City (AZ)	100	133	106	81	Completed
Antelope Canyon Fee Station - Page (AZ)	200	200	159	80	80
Antelope Marina	100	57	36	63	36
		572	396	70	
Cluster 2 (6 trips)					
Monument Valley visitor center (AZ)	150	223	123	55	82
Monument Valley - The View (AZ)	50	44	31	71	62
Navajo National Monument (AZ)	100	117	68	58	68
Four Corners Navajo Tribal Park (AZ)	100	123	123	100	Completed
		507	391	77	
Cluster 3 (8 trips)					
Holiday Inn - Chinle (AZ)	50	45	33	73	66
Thunderbird Lodge Chinle (AZ)	50	73	50	69	Completed
Hubbell Trading Post NHS (AZ)	100	98	61	62	61
Navajo Nation Museum – Window Rock (AZ)	50	51	29	57	58
Canyon de Chelly NM (AZ)	200	181	107	61	54
		448	275	63	
Site total	1,350	1,527	1,062	70%	79%
Western Navajo Fair	400	251	160	65%	41%
GRAND TOTAL			1,222		

Following data collection, ASU researchers entered and cleaned the data in SPSS v 25. Of the 1527 visitor contacts made, researchers collected 1,069 surveys from visitors across the 13 sites (398, 391 and 280 surveys at Clusters 1, 2 and 3 respectively). This led to an overall response rate of 70% with a response rate of 70%, 77% and 63% for Clusters 1, 2 and 3 respectively. The top three reasons given for not completing a survey were lack of time, no interest, and language barriers. Of the 1,069 surveys, seven surveys were excluded from the database

because of underage respondents, resulting in 396, 391 and 275 usable surveys from Clusters 1, 2 and 3 respectively (total 1,062). Likewise, of the 215 contacts made, a total of 163 surveys were completed at the Western Navajo fair. This resulted in a response rate of 65%. Three respondents who were below 18 years of age were excluded from the database resulting in a total of 160 usable surveys from the fair. The final database consisted of a combined total of 1,222 usable cases from Clusters 1,2,3 and the Western Navajo Fair. The data were validated by cross-checking type of trip (day or multi-day) with type of accommodation used the previous night. A second validation check confirmed that all participants at a particular site had responded that they had visited that particular site during their trip to the Navajo Nation.

Descriptives, such as means and frequencies, were estimated by cluster, event and overall.

POPULATION ESTIMATE

In order to estimate the economic impact of tourists to NN, data from the questionnaire and other secondary data are needed. Many visitor studies in Arizona determine visitation by using hotel data from Smith Travel Research (STR) by number of hotel rooms sold in a county (with voluntary individual properties providing business data) or attraction data such as counts at National Park Service locations. NN is complicated because in Arizona, the Nation is located within three counties (Navajo, Coconino and Apache) and many overnight accommodations exist off the reservation in communities such as Page, Flagstaff, the Grand Canyon. In our study, we obtained STR data from Arizona Office of Tourism for the sole purpose of estimating total room nights sold for NN located properties or properties owned/managed by Navajo Enterprise (NE) not located on the Nation, but in nearby communities. STR included 14 properties, and an additional 1 property (The View) was added. Sampling occurred at 4 of the 15 properties. All data sources and estimates are for Arizona only and not the entire NN which is also located in other states.

The overall steps in the population estimate process using **attraction data** are outlined:

1. Obtained monthly or annual visitation from AOT, NN and NPS. Computed monthly visitation where possible to arrive at estimate of visitation for 8 month time period that study occurred (see Table 2 produced by AOT to show visitation at 3 NPS in study/sampling and Glen Canyon NRA which was not included in sampling).
2. Used ASU data on % who visited sites with 8 month estimate to arrive at population estimate of visitors (2.9 million). Added this up across four sites (Canyon de Chelly, Hubbell, Navajo National Monument, and Four Corners).
3. Used ASU data to estimate proportion who visited 2, 3, or 4 of these NPS sites during their visit (Actual data said 33%).
4. Divided the total population estimate of visitors across these four sites and divided by 1-.33. **This provided an estimate of 2.0 million persons (Table 3).**

Table 2. National Park Service Visitation Levels for March to October in 2011 and 2017

	2011	2017	Percent Change	Difference
Canyon de Chelly NM	640,967	641,673	0.1%	706
Glen Canyon NRA	1,827,542	3,541,684	93.8%	1,714,142
Hubbell Trading Post NHS	80,527	41,413	-48.6%	(39,114)
Navajo National Monument (NPS)	78,869	58,055	-26.4%	(20,814)
Grand Total	2,627,905	4,282,825	63.0%	1,654,920

The overall steps in the population estimate using **hotel data** are outlined:

1. Estimated 257,283 room nights demanded (bought) during the 8 month period that are on Navajo Nation or operated by Navajo enterprise from STR data.
2. Estimated nights by hotel guests: mean was 1.84 nights; median was 1 night (used in further estimates).
3. Assumed a room night is equivalent to a travel party.
4. With 1,222 usable completed surveys, estimated 757 cases stayed overnight in a hotel in the sample. The above number in 1. represents only hotels (not other types of lodging/accommodations).
5. Estimated 315 cases stayed in NN/NE hotels or 41.6% (315/757) of those who stayed in a hotel.
6. Estimated 315/1222 (25.8%) to show the proportion of NN hotel in the sample.
7. Divided 257,283 by .258 for 997,221 total population of travel parties who visited NN during March 2018 to October 2018 time period. **This provided an estimate of 2 million using a 2.0 persons in party (median) (Table 3).**
8. Estimated 997,221 visitor parties with segments of: 8% are day visitors; 26% stayed overnight in hotel on NN/NE; 6% camping on NN; 5% other overnight on NN; 3% stayed in private home on NN; and 55% stayed off NN.

In summary, 37% stayed in paid overnight accommodations on the NN and 63% visited the NN and did not stay overnight on the NN (8% day only trip; 55% overnight but in other nonNNAZ accommodation).

A summary of both an attraction and hotel estimation approach is found in Table 3. Additionally, the approach used by NAU in 2011 is provided for comparability.

Table 3. Navajo Nation Population Estimate

	2011 NAU estimate (NPS attraction estimate)	2018 ASU STR Hotel estimate	2018 ASU NPS Attraction estimate
Sample size	2,237	1,222	1,222
Sampling period	12 months	8 months (March-Oct)	8 months (March-Oct)
# of locations sampled at	13 Arizona sites	15 Arizona sites	15 Arizona sites
Day trip proportion	7.7%	8.3% entire trip 1 day	8.3% entire trip 1 day
Overnight proportion	92.3%	91.7% (NN and elsewhere)	91.7% (NN and elsewhere)
Group size (median)	2.0 persons	2.0 persons	2.0 persons
Length of stay (median)	2.0 days (1 night)	1.0 night	n/a
Locations used in population estimate	Canyon de Chelly Hubbell Navajo NM	15 hotel properties (STR adjusted)	3 NPS sites + NN: Canyon de Chelly Hubbell Navajo NM 4 Corners**
% who visited 2 or more attractions (to eliminate multiple counting of visitor population)	42%	n/a	33%
Population estimate (visitors)	589,064 (12 months)	1,994,442 (8 months)	1,965,209 (8 months)
Population estimate (travel parties)	294,532 (12 months)	997,221 (8 months)	982,605 (8 months)***

** inclusion of Four Corners allowed us to capture a different population of visitors more of whom did not visit the NPS sites.

*** We recommend the attraction-based estimate. It is slightly lower than the hotel-based estimate and is a similar method to that used by NAU on the Navajo Nation economic estimate in 2011. We rounded these visitor estimates to 2 million persons.

VISITOR PROFILE FINDINGS

Visit Characteristics

Many respondents, 54 percent, had visited NN previously, particularly those at the Event (85%) and in Cluster 3 (65%). Few in Cluster 1 had previously visited (25%) (Table 4). An average of 62 percent of respondents indicated NN was their primary destination (62%). Again, those attending the Event were more likely there specifically to be at the Event with a smallest percent emerging in Cluster 1 (27%) (Table 3). From Table 5, it appears that many visitors include NN as part of a larger travel itinerary. Respondents were asked how long they were away from home. Only 50% of the respondents provided responses to this question. Of those who did, 82 travel parties were away from home for just a day and were on the reservation for an average of four hours (Table 6). The longest day visits occurred in Cluster 1 (mean=6 hours) and shorter stays at the Event (mean=4 hours). For those who indicated being away from home for at least one overnight, they stayed on average around two nights on the reservation (Table 6). Longer overnights stays were associated with Cluster 2 (mean = 2.7 nights) and the Event (mean = 5 nights).

Table 4. New vs. Repeat Visitors**Before this trip, had you ever visited the Navajo Nation (Reservation)?**

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 392		n = 386		n = 272		n = 156		n = 1,206	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Yes	99	25	147	38	178	65	132	85	650	54
No	293	75	239	62	94	35	24	15	556	46

Table 5. Primary Destination**Is the Navajo Nation the primary destination for your trip?**

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 391		n = 384		n = 270		n = 141		n = 1,186	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Yes	105	27	98	26	125	46	119	84	739	62
No	286	73	286	74	145	54	22	16	447	38

Table 6. Total Time Spent on Navajo Nation**How much time in total did you spend on the Navajo Nation?**

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	Mean	Median	Mean	Median	Mean	Median	Mean	Median	Mean	Median
Day Trip to NN in Hours	n = 8		n = 6		n = 8		n = 60		n = 82	
	6.1	7.0	5.1	4.5	5.0	3.5	4.0	2.5	4.4	3.8
Over-night Trip with stay on NN Nights	n = 172		n = 205		n = 203		n = 25		n = 605	
	1.6	1.0	1.7	1.0	2.7	2.0	5.0	3.0	2.1	1.0

The average party size for visitors was 3.7 people, though the majority were in groups of two people (median=2) (Table 7). Group sizes were largest at the Event and more often included children, which suggest that many were traveling in family groups. Cluster 1 visitors were also more likely to be in groups with children than were Cluster 2 or 3 visitors.

Table 7. Travel Party
Including yourself, how many people are in your travel party?

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	Mean	Median	Mean	Median	Mean	Median	Mean	Median	Mean	Median
	n = 368		n = 386		n = 255		n = 154		n = 1,163	
Men	1.6	1.0	1.5	1.0	1.8	1.0	1.5	1.0	1.6	1.0
Women	1.6	1.0	1.4	1.0	1.9	1.0	1.6	1.0	1.6	1.0
Children under 18	1.0	1.0	0.3	0	0.4	0	1.2	0	0.6	0
Group total	3.8	3.0	3.2	2.0	3.9	2.0	4.2	3.0	3.7	2.0

Table 8. Organized Tour
Are you on an organized tour?

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 390		n = 384		n = 267		n = 156		n = 1,197	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Yes	39	10	17	4	22	8	6	4	84	7
No	351	90	367	96	245	92	150	96	1,113	93

Many overnight respondents stayed in a hotel/motel both the night before (64%) and the night of (63%) their visit, and a fairly large percentage stayed in a campground (13%/16%) or private home (13%/14%), most likely with friends or relatives (Tables 9 and 10). **These overnight accommodations are not necessarily on the Navajo Nation or in Arizona.** Later in the economic section, day and overnight visitors on the Nation are presented. This varied substantially among the groups, however, with a very large percentage of Event attendees staying in private homes (57%). As is typically the case, many visitors drove their own vehicles (48%), especially in Cluster 3 (59%) (Table 11). A few visitors air travel as part of their trips (16%) and a significant number used rental vehicles (50%), with a larger percent of Cluster 1 renting (63%). Those who rented vehicles most often picked them up in Las Vegas (24%), Phoenix (15%), Los Angeles (14%) or San Francisco (12%) (Table 12). A higher percentage of Cluster 1 and 2 respondents rented their cars in Las Vegas (26% and 22%, respectively), with a larger percentage of Cluster 3 visitors renting their vehicles in Albuquerque.

Table 9. Accommodation Type**What type of accommodation did you use last night?**

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 388		n = 382		n = 266		n = 148		n = 1,184	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Hotel or Motel	294	76	259	68	182	68	22	15	757	64
Campground or RV Park	37	10	63	17	47	18	5	3	152	13
Navajo Hogan Bed and Breakfast	5	1	3	1	1	<1*	3	2	12	1
Airbnb**	24	6	6	2	2	1	0	0	32	3
Other bed and breakfast	2	1	6	2	1	<1*	4	3	13	1
Private Home	17	4	24	6	24	9	84	57	139	13
Hostel**	0	0	1	<1*	0	0	0	0	1	0
Other	9	2	20	5	9	3	30	20	68	6

*Less than 1%

**May not be on NN

Table 10. Accommodation Type**What type of accommodation will you use tonight?**

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 383		n = 375		n = 261		n = 0		n = 1,019	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Hotel or Motel	264	69	229	61	144	55	-	-	637	63
Campground or RV Park	43	11	72	19	50	19	-	-	165	16
Navajo Hogan Bed and Breakfast	0	0	6	2	1	<1	-	-	7	1
Airbnb	21	6	9	2	1	<1	-	-	31	3
Other bed and breakfast	3	1	2	1	1	<1	-	-	6	1
Private Home	41	11	42	11	55	21	-	-	138	14
Hostel	0	0	0	0	0	0	-	-	0	0
Other	11	3	15	4	9	3	-	-	35	3

Table 11. Transportation Type**What type of transportation are you using during this trip?**

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 391		n = 385		n = 270		n = 0		n = 1,046	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Own car/motorcycle	131	34	167	43	158	59	-	-	456	43
Rental car/motorcycle	231	59	170	44	76	28	-	-	477	46
Own camper/RV	8	2	27	7	21	8	-	-	56	5
Rental camper/RV	15	4	20	5	7	3	-	-	42	4
Bus/motor coach	9	2	8	2	4	2	-	-	21	2
Airplane**	63	16	77	20	28	10	-	-	168	16
Long-distance Bicycle	0	0	3	1	2	1	-	-	5	<1*
Other	0	0	2	<1*	12	4	-	-	14	1

*Less than 1%

**See Table 12 for airport

Table 12. Source of Car Rental**In what city did you pick up your vehicle?**

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 247		n = 183		n = 84		n = 0		n = 507	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Las Vegas, NV	65	26	41	22	15	18	-	-	121	24
Phoenix, AZ	41	17	22	12	15	18	-	-	78	15
Los Angeles, CA	45	18	27	15	1	1	-	-	73	14
San Francisco, CA	37	15	19	10	15	18	-	-	60	12
Albuquerque, NM	3	1	11	6	20	24	-	-	34	7
Denver, CO	9	4	15	8	5	6	-	-	29	6
Salt Lake City, UT	7	3	10	5	2	2	-	-	19	4
Other Places	40	16	38	21	11	13	-	-	93	18

The most commonly used travel planning information sources by visitors was friends/relatives (38%, mean=2.7), although this was highest for Cluster 1 visitors (33%, mean=2.6). Visitors also relied heavily on travel guides (27%, mean=2.4), and the National Park Service (27%, mean=2.4) (Tables 13 and 14). Visitors in Cluster 3 generally used travel information other than friends and family to a lesser extent than visitors in the other clusters. When asked about their use of visitor information provided by NN, some 14 percent of visitors in Clusters 1-3 used the Discover Navajo website, and about 15 percent used the Visitors Guide (Table 15). A small percentage of Event attendees used these sources.

Table 13. Source of Visitor Information**How important were the following in planning your trip to Navajo Nation?**

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 359		n = 365		n = 256		n = 0		n = 977	
	Mean	%	Mean	%	Mean	%	Mean	%	Mean	%
Friends/Family	3.0	47	2.6	33	1.6	31	-	-	2.7	38
Travel guide book	2.5	30	2.4	27	1.8	24	-	-	2.4	27
National Park Service	2.2	23	2.3	27	2.6	31	-	-	2.4	27
Road-side sign	2.3	24	2.1	20	1.3	12	-	-	2.1	19
Travel blogs	2.5	34	2.1	20	1.5	8	-	-	2.1	22
Brochure/fliers	2.0	14	1.9	16	1.8	12	-	-	1.9	14
Tourist information center	2.1	21	1.9	14	2.2	14	-	-	1.9	17
Movie/TV show	1.7	10	2.0	17	1.5	5	-	-	1.8	12
Navajo Parks & Rec Dept.	1.8	13	1.8	15	2.8	16	-	-	1.8	15
Facebook	2.1	23	1.7	15	1.3	3	-	-	1.8	15
YouTube	1.9	19	1.8	14	1.3	2	-	-	1.7	13
Novel	1.5	7	1.5	8	1.7	11	-	-	1.6	8
Arizona Office of Tourism	1.6	7	1.6	9	1.6	8	-	-	1.6	8
Instagram	1.9	20	1.7	13	1.2	2	-	-	1.6	13
Magazine article	1.6	7	1.5	5	1.5	4	-	-	1.5	6
Tour operator	1.6	10	1.5	9	1.4	7	-	-	1.5	9
Motor club (AAA)	1.5	8	1.5	9	1.6	8	-	-	1.5	8
Newspaper article	1.5	6	1.4	4	1.3	5	-	-	1.4	5
Travel agent	1.5	9	1.5	9	2.5	4	-	-	1.4	8
New Mexico Dept. of Tourism	1.4	6	1.5	8	1.5	8	-	-	1.4	7
Twitter	1.5	9	1.4	6	1.1	1	-	-	1.4	6
Magazine advertisement	1.4	4	1.3	4	1.2	7	-	-	1.3	3
Newspaper advertisement	1.3	4	1.3	3	1.2	1	-	-	1.3	3
TV commercials	1.4	5	1.3	4	1.2	1	-	-	1.3	3
Radio advertisement	1.3	3	1.3	3	1.2	1	-	-	1.2	2
State Parks	2.2	23	2.0	18	1.8	14	-	-	2.0	19

Measured on a 5-point Likert scale where 1 = Not at all important, 5 = Extremely important. Percentages represented the combined percentage of individuals who answered a 4 or a 5

Table 14. Source of Visitor Information - Other

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 359		n = 365		n = 256		n = 0		n = 977	
Other	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Internet	20	6	12	3	13	5	-	-	45	5
Google	13	4	3	1	6	2	-	-	22	2
Trip Advisor	3	1	4	1	4	2	-	-	11	1
Google Maps	4	1	3	1	3	1	-	-	10	1

**Table 15. Use of Navajo Nation Tourism Department for Visitor Information
Did you use any of the resources or assistance provided by Navajo Nation Tourism Department?**

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 387		n = 382		n = 268		n = 157		n = 1,194	
Used	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Discover Navajo Website	59	15	50	13	38	14	11	7	158	13
Visitors Guide	62	16	58	15	42	16	2	1	164	13
Telephone Response/assistance	9	2	10	3	9	3	0	0	28	2

Percents are based on the frequency and “n” for the each of the clusters.

Table 16 reports on visitors’ purposes for visiting NN. In general, visitors were primarily motivated to see interesting sites (82%, mean=4.3) and experience new and different places (69%, mean=4.0). They also reported that experiencing nature (68%, mean=3.9), learning about culture and history (65%, mean=3.8), and experiencing other cultures (65%, mean=3.8) were important. They placed less importance on business, experiencing solitude, and enjoying nice weather. The four groups did exhibit differences in trip purpose. Cluster 1 visitors were more traditional tourists who expressed a variety of reasons for their visit. They were seeing new sights, experiencing nature, spending time with family, and getting away for a while. Cluster 2 visitors are similar to Cluster 1 but with somewhat more focus on experiencing other cultures. Cluster 3 visitors can be considered cultural tourists who placed higher importance on the cultural experience including Navajo culture specifically. Event attendees placed much higher importance on spending time with friends and family than the other groups and somewhat more importance on the Navajo cultural experience.

Table 16. Main Trip Purpose**How important were each in why you wanted to visit the Navajo Nation?**

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 357		n = 365		n = 257		n = 151		n = 1,136	
	Mean	%	Mean	%	Mean	%	Mean	%	Mean	%
See interesting sights	4.3	83	4.4	83	4.4	86	3.8	67	4.3	82
Experience new and different places	3.9	67	4.2	76	4.1	73	3.4	52	4.0	69
Experience nature	3.9	69	3.9	69	4.0	72	3.5	56	3.9	68
Learn about culture and history	3.5	53	3.8	64	4.3	83	3.7	62	3.8	65
Experience other cultures	3.6	57	3.8	64	4.1	76	3.9	66	3.8	65
Get away from everyday life	3.6	58	3.8	64	3.7	61	3.8	65	3.7	62
For excitement/adventure	3.7	60	3.7	62	3.6	55	3.9	66	3.7	60
Spend time with friends/family	3.8	65	3.6	61	3.4	56	4.3	81	3.7	64
Learn about nature	3.4	51	3.5	51	3.6	54	3.3	46	3.5	51
Be physically active	3.0	38	3.4	49	3.4	57	3.7	61	3.4	49
Learn about Navajo traditions	3.0	35	3.4	48	3.9	65	3.8	62	3.4	50
Have an authentic experience of Navajo culture	2.8	30	3.2	44	3.7	59	3.7	62	3.3	47
Experience a connection with Navajo culture	2.8	29	3.2	45	3.8	62	3.8	62	3.3	47
To engage in leisure activities	3.0	43	3.3	49	3.5	54	3.0	42	3.2	47
Be with people who share my values	2.9	38	3.2	48	3.4	54	3.8	64	3.2	49
Experience solitude	2.3	22	2.8	35	2.9	38	3.3	47	3.1	34
Enjoy nice weather	2.7	32	3.1	49	3.3	47	3.5	55	3.1	41
Learn about archaeology	2.4	23	2.8	40	3.2	46	2.6	24	2.7	32
Develop personal, spiritual values	2.2	21	2.7	34	3.0	39	3.5	54	2.7	33
Engage in business activities	1.4	7	1.4	6	1.4	6	2.6	30	1.6	10

Measured on a 5-point Likert scale where 1 = Not at all important, 5 = Extremely important. Percentages represented the combined percentage of individuals who answered a 4 or a 5.

Visitors were asked two questions related to several attractions on NN: their awareness of attractions and if they had visited, or intended to visit, these attractions. Three attractions saw fairly high levels of awareness: Four Corners Monument (63%), Monument Valley Tribal Park (59%), and Antelope Canyon (57%) (Table 17). There were varying levels of awareness among the groups, which tended to be related to the geographic location of the sampling clusters or well-known NN sites. Cluster 1 visitors had particularly high awareness of Antelope Canyon (67%), but also Four Corners (53%) and Monument Valley (48%). Cluster 2 visitors had high awareness of Four Corners (71%) and Monument Valley (70%), as well as Navajo National Monument (48%). Cluster 3 visitors demonstrated high awareness of Canyon de Chelly National Monument (61%), as well as Four Corners (59%), Hubbell Trading Post National Historic Site (58%), and Monument Valley (49%). Cluster 3 visitors also had higher awareness of Chaco Culture National Historical Park (31%). The Event attendees, who were primarily Navajo, showed the highest level of awareness of all attractions.

Not surprisingly, the places people actually visited corresponded to their levels of awareness and the sampling locations: many Cluster 1 participants visited Antelope Canyon (64%); many Cluster 2 visitors went to Monument Valley (73%) and Four Corners (58%); and many Cluster 3 visitors visited Canyon de Chelly (83%), Monument Valley (53%), Four Corners (51%), and Hubbell Trading Post (46%) (Table 18). Most Event attendees did not visit any of these sites with the assumption being that their main attraction was the Event.

Table 17. Awareness of Attractions on the Navajo Nation
Indicate all the sites/attractions that you are aware of

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 307		n = 308		n = 217		n = 135		n = 967	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Four Corners Monument	162	53	215	71	130	59	107	79	614	63
Monument Valley Tribal Park	145	48	212	70	107	49	99	74	563	59
Antelope Canyon	204	67	136	45	99	46	107	80	546	57
Navajo National Monument (NPS)	135	44	147	48	81	37	101	75	464	48
Canyon de Chelly NM	123	41	102	34	134	61	97	74	456	48
Dinosaur Tracks	130	43	112	37	89	41	105	77	436	46
Shiprock "Peak"	111	37	108	36	91	42	93	72	403	42
Hubbell Trading Post NHS	104	34	62	21	126	58	90	71	382	40
Little Colorado River Gorge Overlook	151	50	76	25	57	26	88	66	372	39
Chaco Culture National Historical Park	105	35	84	28	83	38	91	72	363	38
Window Rock Tribal Zoo	102	34	76	25	90	42	91	71	359	38
Window Rock Tribal Parks & Veterans Memorial	109	36	88	29	66	30	88	69	351	37
Explore Navajo Interactive Museum	112	37	74	25	56	26	92	71	334	35
Dine College - Hatathlie Museum	109	36	68	23	65	30	94	73	336	35
Red Rock Park (Church Rock NM)	116	38	71	24	65	30	82	64	334	35
Elephant Feet	101	33	59	20	65	30	89	67	314	33
Bisti/De-na-zin Wilderness	98	32	70	23	62	29	84	67	314	33
Wheatfields Lake	98	32	58	19	51	24	79	63	286	30
Navajo Arts and Crafts Enterprises	126	41	117	38	91	42	105	78	439	45

Table 18. Attractions Have Visited or Will Visit on the Navajo Nation
Indicate all the sites/attractions that you have or will visit

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 362		n = 379		n = 256		n = 145		n = 1,117	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Monument Valley Tribal Park	167	46	274	73	140	53	39	27	620	54
Four Corners Monument	104	29	219	58	132	51	41	28	496	43
Antelope Canyon	232	64	149	40	77	30	31	21	489	43
Canyon de Chelly NM	53	15	97	26	222	83	34	23	406	35
Navajo National Monument	56	16	141	38	79	30	30	21	306	27
Little Colorado River Gorge Overlook	122	34	74	20	64	25	33	23	293	26
Navajo Arts and Crafts Enterprises	76	21	91	24	69	27	32	22	268	24
Hubbell Trading Post NHS	31	9	57	15	121	46	23	16	232	20
Shiprock "Peak"	44	12	72	19	77	30	27	19	220	19
Window Rock Tribal Parks & Veterans Memorial	41	11	56	15	77	30	32	22	206	18
Chaco Culture National Historical Park	25	7	63	17	80	31	23	16	191	17
Red Rock Park (Church Rock NM)	52	14	54	14	43	17	32	22	181	16
Dinosaur Tracks	56	16	58	16	30	12	34	23	178	16
Elephant Feet	53	15	58	16	30	12	29	20	170	15
Window Rock Tribal Zoo	30	8	35	9	51	20	26	18	142	13
Explore Navajo Interactive Museum	60	17	36	10	31	12	24	16	151	13
Bisti/De-na-zin Wilderness	25	7	38	10	32	13	24	16	119	11
Wheatfields Lake	23	6	30	8	36	14	26	18	115	10
Dine College - Hatathlie Museum	21	6	27	7	29	11	20	14	97	9

Visitors were asked about the leisure activities they participated in while visiting NN. Most indicated they were doing general sightseeing (89%) (Table 19). Many were also visiting parks (61%), practicing photography (53%), hiking and walking (51%), and visiting historical areas or sites (44%). Cluster 1 visitors followed this same general pattern of activities, as did Cluster 2 visitors. Cluster 3 visitors, however, placed less emphasis on general sightseeing and photography, instead ranking visiting historic sites and cultural activities as being more important. This question was not asked of visitors at the Western Navajo Fair, because we were limited to a shorter survey due to evening condition. As such, no data for the Event is reported in Table 19.

Table 19. Leisure Activities on the Navajo Nation

What are the primary leisure activities you are engaged in during your visit?

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 374		n = 380		n = 266		n = 0		n = 1,020	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
General sightseeing	335	90	349	92	219	82	-	-	903	89
Visiting parks	219	59	236	62	165	62	-	-	620	61
Photography	207	55	218	57	115	43	-	-	540	53
Hiking/walking	192	51	198	52	128	48	-	-	518	51
Visiting historical areas/historical sites	142	38	159	42	143	54	-	-	444	44
Looking at/buying arts and crafts	76	20	86	23	94	35	-	-	256	25
Shopping	90	24	87	23	80	30	-	-	257	25
Visiting museums	70	19	95	25	80	30	-	-	245	24
Star gazing	78	21	105	28	57	21	-	-	240	24
Eating traditional Navajo foods	61	16	76	20	83	31	-	-	220	22
Family activities	91	24	63	17	39	15	-	-	193	19
Camping	53	14	74	20	58	22	-	-	185	18
Picnicking	64	17	49	13	38	14	-	-	151	15
Educational activities	36	10	36	10	45	17	-	-	117	12
Group tour	60	16	35	9	30	11	-	-	125	12
Visiting friends and relatives	37	10	27	7	32	12	-	-	96	10
Swimming/water sports	43	12	20	5	10	4	-	-	73	7
Boating/rafting	45	12	16	4	11	4	-	-	72	7
Attending festivals/events	21	6	13	3	23	9	-	-	57	6
Attending cultural/educational seminar	15	4	15	4	19	7	-	-	49	5
Horseback riding	18	5	21	6	13	5	-	-	52	5
Bicycling	9	2	16	4	15	6	-	-	40	4
Attending tribal fair/pow wow	11	3	13	3	12	5	-	-	36	4
Gaming/casino	20	5	13	3	8	3	-	-	41	4
Children's activities	18	5	5	1	11	4	-	-	34	3
Attending rodeo	7	2	3	1	12	5	-	-	22	2
Watch sports event	9	2	8	2	6	2	-	-	23	2
Fishing	9	2	8	2	4	2	-	-	21	2
Road Scholar (formerly Elderhostel)	2	<1*	0	0	5	2	-	-	7	1
Hunting	3	1	0	0	1	<1*	-	-	4	1

*Less than 1%

Table 20. Other Leisure Activities on the Navajo Nation

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 374		n = 380		n = 266		n = 0		n = 1,020	
Other	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Driving	0	0	2	1	3	1	-	-	5	<1
Church/Religious	0	0	1	<1	3	1	-	-	4	<1
Canyon Tour	0	0	0	0	3	1	-	-	3	<1

With respect to satisfaction with various aspects of the trip, participants were overall satisfied with their visits. They especially noted satisfaction with the scenic beauty of NN (mean=4.3), feeling safe (mean=4.1), adequate parking (mean=4.1), and friendliness of local people and employees (means=4.1 and 4.0) (Table 21). The clusters did not exhibit large differences with respect to satisfaction, though Cluster 1 visitors reported slightly lower levels of satisfaction than the mean overall satisfaction; and Cluster 3 visitors reported a slightly higher level of satisfaction.

Table 21. Satisfaction**How satisfied were you with these specific aspects of your visit?**

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 337		n = 360		n = 254		n = 0		n = 949	
	Mean	%	Mean	%	Mean	%	Mean	%	Mean	%
Scenic attractiveness of the Navajo Nation	4.1	73	4.4	80	4.5	86	-	-	4.3	80
Friendliness of local people	3.9	65	4.1	70	4.3	79	-	-	4.1	71
Availability of adequate parking	4.0	66	4.1	72	4.2	74	-	-	4.1	71
Feelings of personal safety	4.0	69	4.3	79	4.1	73	-	-	4.1	74
Friendliness of local merchants and service providers	3.8	61	4.0	65	4.3	79	-	-	4.0	67
Availability of Navajo products and souvenirs	3.7	54	4.1	71	4.2	75	-	-	4.0	66
Customer service at tourism businesses	3.7	55	3.9	62	4.2	78	-	-	3.9	64
Quality of Navajo products and souvenirs	3.7	50	3.9	65	4.1	71	-	-	3.9	61
Access to restroom facilities	3.5	51	3.9	64	4.0	65	-	-	3.8	59
Travel information availability	3.6	51	3.8	60	4.0	63	-	-	3.8	58
Quality of lodging	3.7	55	3.8	55	3.9	62	-	-	3.8	56
Directional signage on the Navajo Nation	3.6	50	3.9	61	3.8	59	-	-	3.8	56
Attractiveness of built facilities	3.5	48	3.9	66	3.8	62	-	-	3.8	59
Value for money	3.4	45	3.7	64	4.0	64	-	-	3.7	53
Quality of highways and roads	3.7	60	3.6	54	3.9	64	-	-	3.7	59
Domestic animal control/welfare	3.3	41	3.6	50	3.4	44	-	-	3.5	45
Quality of restaurants	3.3	37	3.5	46	3.5	47	-	-	3.4	43

Measured on a 5-point Likert scale where 1 = Not at all satisfied, 5 = Extremely satisfied. Percentages represented the combined percentage of individuals who answered a 4 or a 5

Table 22. Satisfaction - Other

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 337		n = 360		n = 254		n = 0		n = 949	
Other	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Value for money	0	0	1	<1*	0	0	-	-	1	<1*
Traditional Navajo food	0	0	0	0	1	<1*	-	-	1	<1*
Road in Monument	0	0	1	<1*	0	0	-	-	1	<1*
Panhandlers	0	0	0	0	1	<1*	-	-	1	<1*
Interpretive signage	0	0	0	0	1	<1*	-	-	1	<1*
Atmosphere	0	0	0	0	1	<1*	-	-	1	<1*

*Less than 1%

Respondents reported that the NN provided very good value for money and a very good overall visit (Table 23 and Figure 1). They also tended to agree that NN provided an authentic experience of Navajo culture (Table 24 and Figure 2). Cluster 3 visitors rated all these items the highest.

Table 23. Rating of Navajo Nation Trip Elements

On a scale of 1-10 where 1=poor and 10=excellent, how would you rate the Navajo Nation on:

	Cluster 1	Cluster 2	Cluster 3	Event	Total
	Mean	Mean	Mean	Mean	Mean
	n = 240	n = 332	n = 166	n = 136	n = 874
Value for Money	7.7	8.0	8.7	7.8	8.0
	n = 344	n = 353	n = 246	n = 148	n = 1,091
Overall Visit	8.3	8.5	8.9	8.2	8.5

Figure 1. Total Sample Population

On a scale of 1-10 where 1=poor and 10=excellent, how would you rate the Navajo Nation on:

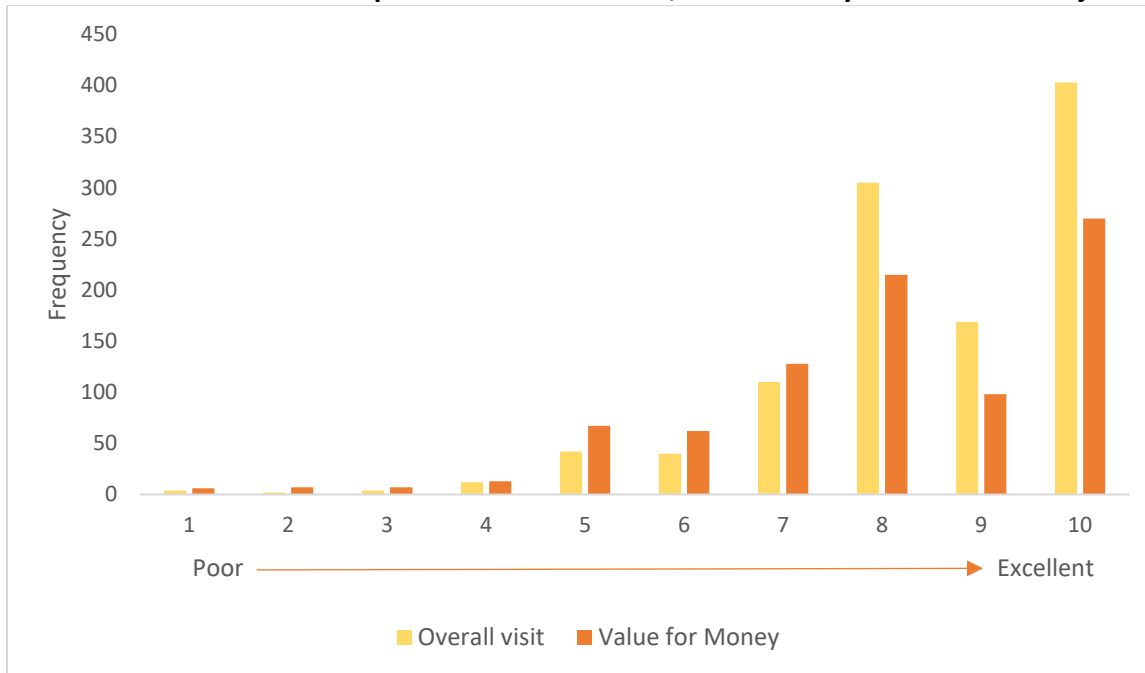


Table 24. Authentic Experience of Navajo Culture

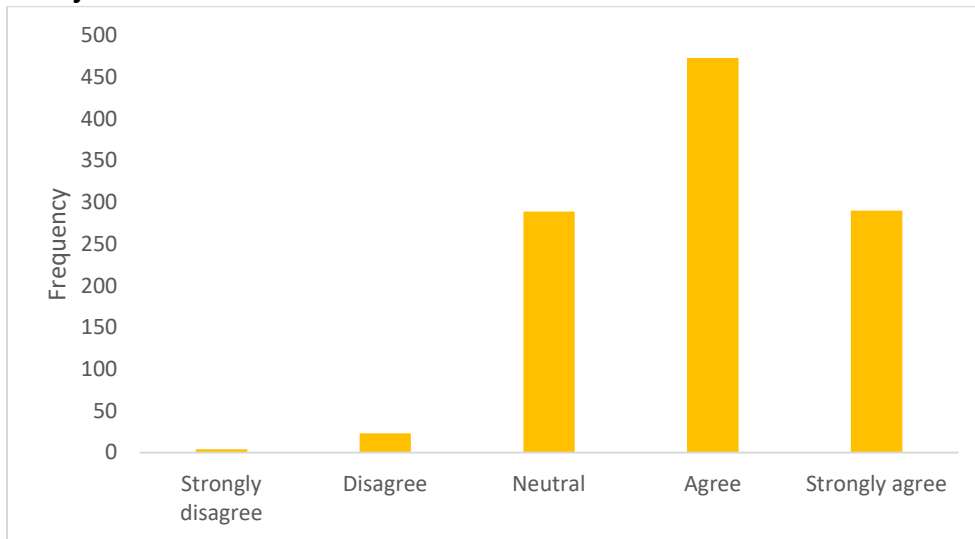
On a scale of 1-5, to what extent does the Navajo Nation provide an authentic experience of Navajo culture?

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 335		n = 346		n = 248		n = 150		n = 1,079	
	Mean	%	Mean	%	Mean	%	Mean	%	Mean	%
Authentic experience of Navajo culture	3.7	60	3.9	69	4.2	83	4.1	78	4.0	71

Measured on a 5-point Likert scale where 1 = Strongly disagree, 5 = Strongly agree. Percentages represented the combined percentage of individuals who answered a 4 or a 5

Figure 2. Total Sample Population

On a scale of 1-5, to what extent does the Navajo Nation provide an authentic experience of Navajo culture?



A substantial percentage of visitors indicated they planned to return to NN, especially those visiting in Cluster 3 and the Event (Table 25 and Figure 3), to see more of the NN and its beauty as well as to visit family (Table 24). Those who do not plan to visit again tended to suggest this was a one-time visit owing to distance, age or the desire to visit other places (Table 25). Almost everyone indicated they would recommend a visit to NN (Table 25 and Figure 4), so others can experience the beautiful landscape and culture (Table 26).

Table 25. Return to Navajo Nation

Do you plan to return to the Navajo Nation in your lifetime?

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 338		n = 346		n = 255		n = 160		n = 1,099	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Yes	285	84	288	83	241	95	151	94	965	88
No	53	16	58	17	14	5	9	6	134	12

Figure 3. Do you plan to return to the Navajo Nation in your lifetime?
Total Sample Population

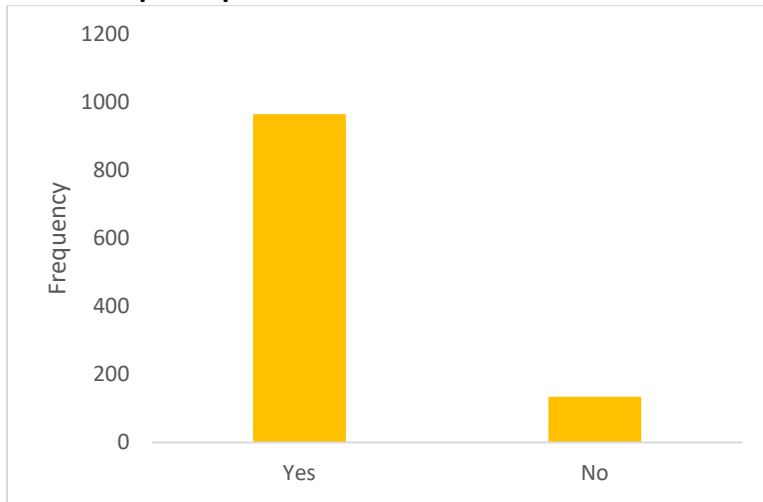


Table 26. Reasons to Return to Navajo Nation

	Cluster 1 n = 125		Cluster 2 n = 94		Cluster 3 n = 86		Event n = 78		Total n = 382	
Other	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
More to See	17	14	9	10	10	12	0	0	36	9
Family Here	6	5	2	2	4	5	26	33	33	9
Natural Beauty	10	8	12	13	4	5	1	1	25	7
Take Family	11	9	10	11	3	3	1	1	25	7
Landscapes	2	2	6	6	7	8	0	0	15	4
Other	79	63	55	59	58	67	50	64	249	65

Table 27. Reasons Visitor Will Not Return to Navajo Nation

	Cluster 1 n = 36		Cluster 2 n = 30		Cluster 3 n = 9		Event n = 4		Total n = 79	
Other	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Distance	20	54	13	43	3	33	1	25	37	47
Desire to See Other Places	1	3	9	30	1	11	0	0	15	19
Age – Too Old	1	3	2	7	2	22	0	0	5	6
Expensive	3	9	0	0	0	0	0	0	3	4
Limited Time	2	6	0	0	0	0	0	0	2	3
Other	9	26	6	20	3	33	3	75	17	22

Table 28. Recommend Navajo Nation
Would you recommend a visit to the Navajo Nation?

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 352		n = 355		n = 257		n = 160		n = 1,124	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Yes	346	98	347	98	257	100	157	98	1107	98
No	6	2	8	2	0	0	3	2	17	2

Figure 4. Would you recommend a visit to the Navajo Nation?
Total Sample Population

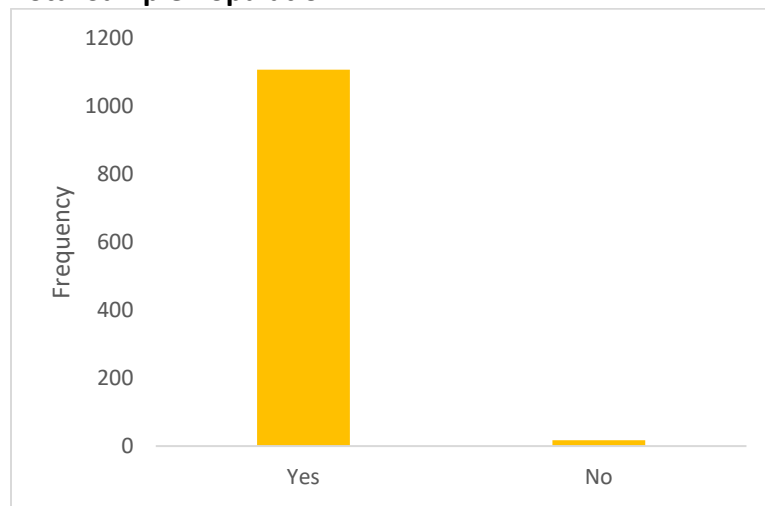


Table 29. Elements to Recommend Navajo Nation to Others

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 134		n = 102		n = 71		n = 54		n = 361	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Other										
Beautiful Landscape	47	35	38	37	29	41	9	17	123	34
Great Experience	8	6	10	10	4	6	4	7	26	7
Culture	7	5	6	6	8	11	2	4	23	6
Historical Importance	3	2	2	2	3	4	0	0	8	2
Interesting	5	4	1	1	2	3	0	0	8	2
Other	64	48	45	44	25	35	39	72	173	48

Table 30. Elements to Not Recommend Navajo Nation to Others

	Cluster 1 n = 1		Cluster 2 n = 3		Cluster 3 n = 0		Event n = 1		Total n = 5	
Other	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Authentic Experience	0	0	1	33	0	0	0	0	1	20
Cost	1	100	0	0	0	0	0	0	1	20
Haven't been here long enough	0	0	0	0	0	0	1	100	1	20
Public Bathrooms	0	0	1	33	0	0	0	0	1	20
Too Hot	0	0	1	33	0	0	0	0	1	20

As with most Native American tribes and reservations, NN has a protocol that they request visitors follow when visiting. Only 25 percent of total visitors were aware of the protocol (Table 31 and Figure 5). The Event visitors had the highest percentage of awareness (67%) with the Cluster 1 visitors having the lowest awareness (17%). Even among the more culturally oriented visitors in Cluster 3 only about a third were aware of the protocol (32%). Those aware of the protocol got their information in “other” ways (Table 32) and found it somewhat helpful in informing them of appropriate behavior (Table 31). Very few visitors noticed others engaged in inappropriate behavior (Table 34).

Table 31. Navajo Nation Protocol

Are you aware of the Navajo Nation protocol for visitor behavior?

	Cluster 1 n = 348		Cluster 2 n = 348		Cluster 3 n = 258		Event n = 148		Total n = 1,102	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Yes	56	16	84	24	82	32	49	67	271	25
No	292	84	264	76	176	68	99	33	831	75

Figure 5. Are you aware of the Navajo Nation protocol for visitor behavior?

Total Sample Population

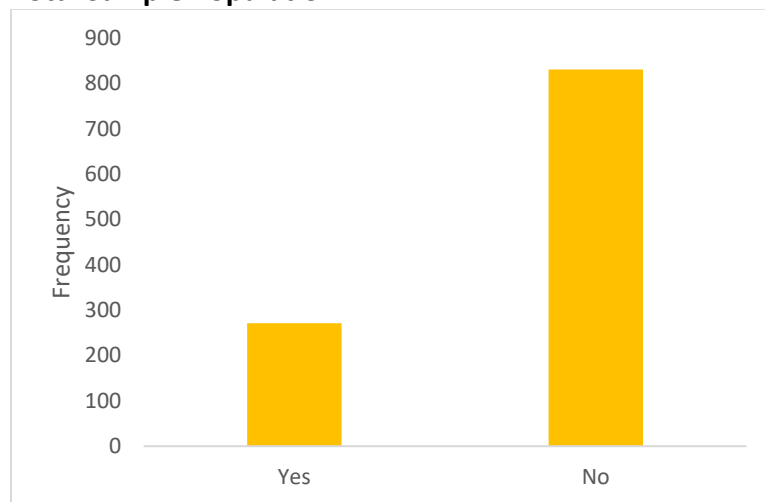


Table 32. Navajo Nation Protocol - If yes, where did you get this information?

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 42		n = 59		n = 66		n = 29		n = 196	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Family	0	0	5	8	4	6	7	24	16	8
Friends	2	5	4	7	6	9	4	14	16	8
Internet	5	12	5	8	4	6	1	3	15	8
Signage	5	12	8	14	1	2	0	0	13	7
Travel Guide Book	2	5	4	7	3	5	0	0	9	5
Website	4	10	1	2	3	5	1	3	9	5
Other	24	57	32	54	45	68	16	55	118	61

Table 33. Navajo Nation Protocol Improved Awareness**If you have looked at the protocol, to what extent did it help you improve your awareness of:**

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	Mean	%	Mean	%	Mean	%	Mean	%	Mean	%
Appropriate behavior	3.5	56	3.4	53	3.5	57	-	-	3.4	55
The Navajo way of life	3.6	54	3.2	46	3.6	59	-	-	3.5	52
Reasons of restriction to certain activities	3.6	59	3.3	42	3.5	57	-	-	3.5	54
Law enforcement jurisdiction	3.4	47	3.1	42	3.2	47	-	-	3.2	45

Measured on a 5-point Likert scale where 1 = Not at all, 5 = Extremely. Percentages represented the combined percentage of individuals who answered a 4 or a 5

Table 34. Observe Visitors**During your visit, how frequently did you observe visitors doing these behaviors:**

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	Mean	%	Mean	%	Mean	%	Mean	%	Mean	%
Entering areas that are off limits	1.7	9	1.6	8	1.3	2	-	-	1.6	7
Straying off designated trails and established routes	1.9	13	1.7	10	1.5	7	-	-	1.7	10
Traveling off road using all terrain vehicles (ATVs)	1.5	5	1.4	5	1.2	1	-	-	1.4	4
Rock climbing	1.6	5	1.3	4	1.2	2	-	-	1.4	4
Removing something such as animals, plants, rocks or artifacts off the land	1.3	4	1.3	4	1.1	1	-	-	1.3	4
Littering	1.5	6	1.4	6	1.4	4	-	-	1.4	5

Measured on a 5-point Likert scale where 1 = Never, 5 = Always. Percentages represented the combined percentage of individuals who answered a 4 or a 5

Demographic Profile

Diverse visitors come to NN. A substantial number of respondents were international visitors (25%) from a number of countries, including Germany, France and Italy (Tables 35 and 36). Cluster 3 and Events attract a smaller proportion of international visitors than Clusters 1 and 2. The average age of NN visitors was 47 years old, but differed among groups with Cluster 3 respondents being older (mean=57) and Event attendees younger (mean=36) (Table 37). More men (55%) than women (45%) completed questionnaires (Table 36), but again the Event attendees differed and more women (68%) than men (32%) were in the sample. Income levels of respondents were varied, but tend to be high, with 50 percent of respondents earning \$125,000 a year or more (Table 39). Event attendees had a noticeably lower income than other respondents but few differences across the clusters are evident. Respondents had fairly high education levels as well, with most having a four-year college/university degree or higher (68%), though consistent with income level, Event attendees had slightly lower education levels than those in the clusters (Table 40).

Table 35. Domestic vs. Foreign Visitation

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 367		n = 375		n = 262		n = 151		n = 1,155	
Visitor Origins	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Domestic	226	62	260	69	236	90	146	97	868	75
Foreign	141	38	115	31	26	10	5	3	287	25

Table 36. Country of Origin

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 367		n = 375		n = 262		n = 151		n = 1,155	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
United States	226	62	260	69	236	90	146	97	868	75
Germany	23	6	23	6	5	2	0	0	51	4
France	20	5	17	5	3	1	0	0	40	3
Italy	19	5	7	2	2	1	0	0	28	2
Canada	7	2	8	2	0	0	0	0	15	1
Australia	7	2	6	2	1	<1	1	1	15	1
Spain	8	2	6	2	0	0	0	0	14	1
Other	57	16	48	13	15	6	4	2	124	11

Table 37. Year Born

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 351		n = 358		n = 248		n = 147		n = 1,104	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
1930-1939	1	<1	3	1	6	2	0	0	10	1
1940-1949	10	3	33	9	54	22	3	2	100	10
1950-1959	56	16	74	21	81	33	9	6	220	20
1960-1969	63	18	71	20	43	17	9	6	186	17
1970-1979	78	22	57	16	25	10	28	19	188	17
1980-1989	79	23	79	22	26	10	45	31	229	21
1990-1999	64	18	41	11	13	5	53	36	171	15
Mean Age	44		48		57		36		47	

Table 38. Gender

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 365		n = 370		n = 258		n = 154		n = 1,147	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Male	207	57	230	62	142	55	49	32	628	55
Female	158	43	140	38	116	45	105	68	519	45

Table 39. 2017 Household Income Before Taxes

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 312		n = 321		n = 222		n = 130		n = 985	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Less than \$14,999	13	4	9	3	9	4	15	12	46	5
\$15,000-\$19,999	11	4	11	3	2	1	13	10	37	4
\$20,000-\$29,999	8	3	10	3	9	4	15	12	42	4
\$30,000-\$39,999	15	5	17	5	11	5	13	10	56	6
\$40,000-\$49,999	20	6	23	7	15	7	5	4	63	6
\$50,000-\$59,999	31	10	21	7	19	9	12	9	83	8
\$60,000-\$69,999	21	7	20	6	13	6	15	12	69	7
\$70,000-\$79,999	28	9	28	9	21	10	7	5	84	9
\$80,000-\$89,999	18	6	30	9	11	5	6	5	65	7
\$90,000-\$99,999	22	7	20	6	22	10	6	5	70	7
\$100,000-\$109,999	22	7	29	9	20	9	8	6	79	8
\$110,000-\$124,999	11	4	16	5	11	5	5	4	43	4
\$125,000 +	92	30	87	27	59	27	10	8	248	25

Table 40. Highest Education Attainment

	Cluster 1		Cluster 2		Cluster 3		Event		Total	
	n = 362		n = 368		n = 259		n = 150		n = 1,104	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Less than high school	2	1	2	1	0	0	3	2	7	1
High school graduate	31	9	30	8	18	7	29	19	108	10
Some college	33	9	48	13	27	10	35	23	143	13
Associate/Technical degree (2 year degree)	36	10	44	12	16	6	19	13	115	10
College Degree (4 year degree)	129	36	129	35	81	31	33	22	372	33
Post Graduate	131	36	115	31	117	45	31	21	394	35
Mode Education Level	College Degree		College Degree		Post Graduate Degree		Some College		Post Graduate Degree	

Cluster Analysis

Cluster 1 visitors. These visitors tend to be general tourists engaged in a variety of activities and include NN as part of a larger trip. They visit well known attractions close to the major highway (Highway 89) as well as Monument Valley. Many are in rental cars and they are on a shorter stop on NN than other groups. This cluster includes the highest percentage of international visitors.

Cluster 2 visitors. This group has many commonalities with Cluster 1 visitors but with a somewhat greater focus on cultural tourism. Also, there is a lower percentage of international visitors, more are in their own vehicles, and are more likely to be camping.

Cluster 3 visitors. Visitors in Cluster 3 are quite a bit different than those in Clusters 1 and 2. They can generally be characterized as cultural tourists. They indicate that cultural motives and activities are more important to them than do the visitors in other Clusters. They are visiting some of the attractions deeper into NN such as Hubble Trading Post. They are the most likely to be repeat visitors, to have the NN as their primary destination, and spend more time than Cluster 1 and 2 visitors. They are more likely to be in their own vehicles, and like Cluster 2, they are more likely to be camping than Cluster 1. Few international visitors are in this Cluster.

Event visitors. Visitors to the event tend to be visiting family and friends. Most are Navajo either from other places on NN or from other places in the Four Corners region. Many are staying with friends and family during the event.

Domestic and Foreign Visitors

As noted previously, NN's visitors are diverse. A significant number of foreign travelers visit the NN, although the large majority are residents of the United States. For both domestic and foreign visitors, the NN was not the main destination of their trip, although nearly half of US resident participants (46%) said that NN was the primary destination (Table 41). US resident visitors spent more time (0.6 nights longer) on the reservation than foreign tourists did (Table 42). The most visited attraction among domestic visitors is the Four Corners Monument (50%), followed by Monument Valley Tribal Park (47%) and Canyon de Chelly National Monument (39%). For foreign tourists, the most popular attraction is Monument Valley (74%), followed by Antelope Canyon (24%) and Navajo National Monument (27%) (Table 43).

Table 41. Primary Destination

Is the Navajo Nation the primary destination for your trip?

	Domestic		Foreign	
	n = 830		n = 285	
	Freq.	%	Freq.	%
Yes	384	46	40	14
No	446	54	245	86

Table 42. Nights Spent on the Navajo Nation

How many nights did you spend on the Navajo Nation?

	Domestic		Foreign	
	Mean	Median	Mean	Median
	n = 403		n = 184	
Nights	2.3	1.0	1.7	1.0

Table 43. Attractions Have or Will Visit on the Navajo Nation
Indicate all the sites/attractions that you have or will visit

	Domestic		Foreign	
	n = 804		n = 279	
	Freq.	%	Freq.	%
Four Corners Monument	400	50	73	26
Monument Valley Tribal Park	384	47	208	74
Canyon de Chelly NM	318	39	68	24
Antelope Canyon	275	34	189	68
Navajo National Monument	216	27	76	27
Little Colorado River Gorge Overlook	203	25	73	26
Navajo Arts and Crafts Enterprises	189	24	59	21
Hubbell Trading Post NHS	193	24	28	10
Shiprock "Peak"	182	23	26	9
Window Rock Tribal Parks & Veterans Memorial	166	21	30	11
Chaco Culture National Historical Park	160	20	24	9
Red Rock Park (Church Rock NM)	134	17	35	13
Dinosaur Tracks	132	16	40	14
Elephant Feet	122	15	37	13
Explore Navajo Interactive Museum	112	14	34	12
Window Rock Tribal Zoo	113	14	21	8
Wheatfields Lake	94	12	16	6
Bisti/De-na-zin Wilderness	95	12	19	7
Dine College - Hatathlie Museum	77	10	15	5

People visit the NN for a wide range of reasons. The main reason for visiting among both domestic (81%) and foreign visitors (84%) was to see interesting sights (Table 44). These were followed by experiencing new and different places (domestic 69%; foreign 71%) and experiencing nature (domestic 68%; foreign 69%). Most of the motivations expressed by foreign and domestic tourists were similar in importance, although 'being physically active' was considered much more important among domestic tourists (mean=3.5) than it was among foreign visitors (mean=2.9). Other categories that demonstrate a notable difference between the two groups include engaging in leisure activities, experiencing solitude, and enjoying nice

weather. Engaging in business activities was the least important trip purpose in both groups (domestic mean=1.7; foreign mean=1.3).

Table 44. Main Trip Purpose
How important were each in why you wanted to visit the Navajo Nation?

	Domestic		Foreign	
	n = 808		n = 271	
	Mean	%	Mean	%
See interesting sights	4.3	81	4.4	84
Experience new and different places	4.0	69	4.0	71
Experience nature	3.9	68	3.9	69
Learn about culture and history	3.9	67	3.6	58
Get away from everyday life	3.8	65	3.5	55
For excitement/ adventure	3.8	62	3.5	55
Spend time with friends/family	3.8	68	3.4	54
Experience other cultures	3.8	66	3.9	65
Learn about nature	3.5	51	3.5	52
Be physically active	3.5	54	2.9	32
Learn about Navajo traditions	3.5	53	3.3	43
To engage in leisure activities	3.4	52	2.7	31
Be with people who share my values	3.4	53	2.9	36
Experience a connection with Navajo culture	3.4	50	3.0	35
Have an authentic experience of Navajo culture	3.3	48	3.2	38
Enjoy nice weather	3.2	46	2.6	29
Experience solitude	2.9	37	2.2	20
Learn about archaeology	2.8	34	2.4	21
Develop personal, spiritual values	2.8	37	2.4	25
Engage in business activities	1.7	12	1.3	3

Measured on a 5-point Likert scale where 1 = Not at all important, 5 = Extremely important. Percentages represented the combined percentage of individuals who answered a 4 or a 5

Overall, the NN provides satisfying experiences for its visitors (Table 45). Domestic and foreign visitors were particularly satisfied with the NN's scenic attractions (domestic mean=4.4; foreign mean=4.3), personal safety/security (domestic mean=4.1; foreign mean 4.2), adequacy of

parking (domestic mean=4.0; foreign mean=4.2), friendliness (domestic mean=4.1; foreign mean 3.7) and availability of Navajo products and souvenirs (domestic mean=4.0; foreign mean=3.9). Visitors were least satisfied with domestic animal care/control (domestic mean=3.4; foreign mean=3.5) and restaurant quality (domestic mean =3.5; foreign mean=3.3). In most satisfaction categories there is relatively little difference between the perceptions of US residents and foreign tourists.

Table 45. Satisfaction
How satisfied were you with these specific aspects of your visit?

	Domestic		Foreign	
	n = 653		n = 254	
	Mean	%	Mean	%
Scenic attractiveness of the Navajo Nation	4.4	80	4.3	77
Friendliness of local merchants and service providers	4.1	72	3.7	58
Friendliness of local people	4.1	73	3.8	64
Feelings of personal safety	4.1	72	4.2	78
Availability of adequate parking	4.0	68	4.2	78
Availability of Navajo products and souvenirs	4.0	67	3.9	64
Customer service at tourism businesses	4.0	67	3.7	54
Quality of Navajo products and souvenirs	3.9	62	3.8	58
Access to restroom facilities	3.8	59	3.7	61
Travel information availability	3.8	58	3.7	57
Value for money	3.8	58	3.3	39
Quality of lodging	3.8	58	3.6	54
Directional signage on the Navajo Nation	3.8	57	3.7	54
Attractiveness of built facilities	3.8	61	3.7	52
Quality of highways and roads	3.7	60	3.7	56
Quality of restaurants	3.5	46	3.3	35
Domestic animal control/welfare	3.4	44	3.5	47

Measured on a 5-point Likert scale where 1 = Not at all satisfied, 5 = Extremely satisfied. Percentages represented the combined percentage of individuals who answered a 4 or a 5

Seasonal Visitors

The study included samples of visitors during the spring shoulder season, summer high season and fall shoulder season (Table 46). Most of the attractions were visited relatively consistently throughout the spring, summer and fall periods. A notable exception is Canyon de Chelly NM, which was visited significantly less (22%) in the spring than it was during the summer (36%) and fall (39%). Hubbell Trading Post NHS also saw varying rates of visitation among the three seasons (spring, 12%, summer 19%, and fall 25%). Autumn visitors appear to be more likely to visit Canyon de Chelly, Dine College, Wheatfields Lake, Hubbell Trading Post, Red Rock Park, Bisti/De-na-zin Wilderness, Chaco Culture NHP, Window Rock Tribal Parks & Veterans Memorial, Shiprock Peak and Window Rock Tribal Zoo.

Table 46. Attractions Have Visited or Will Visit on the Navajo Nation
Indicate all the sites/attractions that you have visited or will visit

	Spring		Summer		Fall*	
	n = 135		n = 597		n = 415	
	Freq.	%	Freq.	%	Freq.	%
Navajo Arts and Crafts Enterprises	36	27	134	22	89	24
Four Corners Monument	56	42	269	45	171	42
Monument Valley Tribal Park	74	55	347	58	199	48
Navajo Nation Monument	36	27	154	26	116	28
Elephant Feet	25	19	73	12	72	18
Antelope Canyon	74	55	269	45	146	36
Dinosaur Tracks	21	16	88	15	69	17
Explore Navajo Interactive Museum	21	16	65	11	65	16
Little Colorado River Gorge Overlook	34	25	158	27	101	25
Canyon de Chelly NM	30	22	214	36	162	39
Dine College - Hatathlie Museum	9	7	44	7	44	11
Wheatfields Lake	14	10	46	8	55	14
Hubbell Trading Post NHS	16	12	115	19	101	25
Red Rock Park (Church Rock NM)	20	15	84	14	77	19
Bisti/De-na-zin Wilderness	11	8	53	9	55	14
Chaco Culture National Historical Park	13	10	94	16	84	21
Window Rock Tribal Parks & Veterans Memorial	20	15	100	17	86	21
Shiprock "Peak"	23	17	107	18	90	22
Window Rock Tribal Zoo	13	10	73	12	56	14

*Event was included in Fall statistics

Seeing interesting sights was the most prominent reason for visiting NN during the three seasons surveyed, while engaging in business activities was the least important across the board (Table 47). Experiencing nature and culture plays a very important role in people’s motivations for visiting NN. The importance of experiencing a connection with Navajo culture (spring mean=3.0, summer mean=3.2, fall mean=3.5), learning about Navajo traditions (spring mean=3.2, summer mean=3.3, fall mean=3.6), having an authentic experience with Navajo culture (spring mean=3.0, summer mean=3.2, fall mean=3.5), and developing personal, spiritual values (spring mean=2.4, summer mean=2.6, fall mean=3.0) demonstrated notable variations between seasons, with fall visitors ranking all of these purposes substantially higher than spring and summer visitors. This is likely related to the October Western Navajo Fair.

Table 47. Main Trip Purpose
How important were each in why you wanted to visit the Navajo Nation?

	Spring		Summer		Fall	
	n = 126		n = 588		n = 423	
	Mean	%	Mean	%	Mean	%
Experience new and different places	4.1	72	4.0	70	3.9	68
Learn about nature	3.4	50	3.4	50	3.5	54
Get away from everyday life	3.7	57	3.7	60	3.8	65
For excitement/ adventure	3.7	61	3.7	59	3.8	62
Spend time with friends/family	3.6	60	3.7	63	3.8	66
Learn about archaeology	2.6	26	2.7	31	2.8	33
Enjoy nice weather	2.9	31	2.9	36	3.3	51
To engage in leisure activities	3.1	45	3.2	45	3.3	49
Experience nature	3.8	67	3.9	69	3.9	67
Learn about culture and history	3.6	62	3.8	63	3.9	68
Be physically active	3.2	46	3.2	43	3.6	58
See interesting sights	4.3	84	4.3	83	4.2	80
Be with people who share my values	3.0	41	3.2	47	3.4	53
Experience other cultures	3.6	62	3.8	65	3.9	67
Engage in business activities	1.5	10	1.4	5	1.9	17
Have an authentic experience of Navajo culture	3.0	38	3.2	41	3.5	54
Learn about Navajo traditions	3.2	45	3.3	45	3.6	58
Experience a connection with Navajo culture	3.0	38	3.2	42	3.5	55
Develop personal, spiritual values	2.4	27	2.6	31	3.0	39
Experience solitude	2.5	26	2.6	31	2.9	38

Measured on a 5-point Likert scale where 1 = Not at all important, 5 = Extremely important. Percentages represented the combined percentage of individuals who answered a 4 or a 5

For the majority of spring (66%) and summer visitors (73%), the NN was not the primary destination of their journeys. The majority of fall visitors (55%), however, suggested that the NN was their primary destination (Table 46).

Table 48. Primary Destination

Is the Navajo Nation the primary destination for your trip?

	Spring		Summer		Fall	
	n = 137		n = 618		n = 431	
	Freq.	%	Freq.	%	Freq.	%
Yes	47	34	165	27	235	55
No	90	66	453	73	196	45

There was not a great deal of seasonal difference in the number of nights spent on the NN (Table 49). Summer visitors spent slightly more time on the reservation (mean=2.2 nights) than spring (mean=1.6 nights) and fall (mean=2.1 nights) visitors did.

Table 49. Total nights spent on the Navajo Nation

How many nights did you spend on the Navajo Nation?

	Spring		Summer		Fall	
	Mean	Median	Mean	Median	Mean	Median
	n = 56		n = 291		n = 228	
Nights	1.6	1.0	2.2	1.0	2.1	1.0

For the most part, spring, summer and fall visitors to NN were satisfied or highly satisfied with their experiences (Table 50). Spring visitors were most satisfied with the NN’s scenic attractiveness (mean=4.1) and sense of personal safety (mean=4.0). Summer visitors experienced the highest levels of satisfaction with the scenic attractiveness of the NN (mean=4.3), friendliness of local people (mean=4.1), adequacy of parking (mean=4.1), and their sense of personal safety (mean=4.1). Fall visitors were most satisfied with the NN’s scenery (mean=4.5), personal safety (mean=4.2), adequacy of parking (mean=4.1), availability of Navajo products and souvenirs (mean=4.1), and the friendliness of local residents (mean=4.1). Across all three seasons, visitors were least satisfied with domestic animal control and quality of restaurants.

Table 50. Satisfaction**How satisfied were you with these specific aspects of your visit?**

	Spring		Summer		Fall	
	n = 121		n = 566		n = 268	
	Mean	%	Mean	%	Mean	%
Friendliness of local merchants and service providers	3.7	55	4.0	68	4.1	71
Access to restroom facilities	3.4	49	3.8	60	3.9	65
Travel information availability	3.5	47	3.7	56	3.9	66
Friendliness of local people	3.9	65	4.1	70	4.1	75
Value for money	3.5	45	3.6	52	3.8	59
Quality of restaurants	3.3	39	3.4	41	3.5	49
Quality of lodging	3.7	52	3.7	56	3.8	61
Quality of highways and roads	3.6	56	3.7	58	3.8	63
Availability of adequate parking	3.9	64	4.1	71	4.1	73
Availability of Navajo products and souvenirs	3.7	56	4.0	67	4.1	69
Quality of Navajo products and souvenirs	3.7	57	3.9	61	3.9	64
Customer service at tourism businesses	3.7	56	3.9	64	4.0	67
Directional signage on the Navajo Nation	3.6	52	3.7	57	3.9	58
Feelings of personal safety	4.0	67	4.1	73	4.2	77
Attractiveness of built facilities	3.8	60	3.8	57	3.8	62
Scenic attractiveness of the Navajo Nation	4.1	50	4.3	79	4.5	84
Domestic animal control/welfare	3.4	41	3.4	44	3.5	49

Measured on a 5-point Likert scale where 1 = Not at all satisfied, 5 = Extremely satisfied. Percentages represented the combined percentage of individuals who answered a 4 or a 5

Economic Contribution of Tourism to the Navajo Nation 2018

The analysis of the economic impact of visitor spending on the Navajo Nation for the study period was accomplished by using SPSS and Implan, an input-output analysis software, and completed by Tom Combrink at Northern Arizona University. Combrink also conducted the economic impact analysis for the 2011 study. Data for the analysis were provided by ASU and collected for a tourism survey of visitors to the Navajo Nation during eight months (peak season) of 2018. Visitor questionnaires were distributed and included in the survey instrument were a set of standard tourist expenditure questions. It needs to be noted that the expenditure questions were prefaced with the following statement “Please estimate as closely as possible the TOTAL amount of money your travel party spent (or will spend) directly on the Navajo Nation for the following categories (in U.S. dollars).” Survey expenditures are for the total trip on the Navajo Nation, which ranged from less than a day (classified as a day trip) to overnight stays on the Nation. Therefore, the first order of analysis is to divide the total visitor estimate for the period of the survey into either day or overnight visitors. It is estimated that there were 2,000,000 individual visitors over the period of the analysis. The previous study in 2011 estimated 589 thousand visitors during a 12-month period. This suggests an increase in visitors on the Nation and likely differences in research approaches. There were more visitors who visited the NN for the day (63%) than overnight visitors (37%) who stayed in a NN community. This is the other statistic that varies across the 2011 and 2018 studies. In 2011 the proportion of day trips was 8% and overnight (anywhere) was 92%. In 2018, we made an effort to differentiate those who specifically stayed overnight on the Nation by asking what community people stayed at and in what type of accommodations. For estimating the overnight population on the Nation, Smith Travel Research (STR) data and a list of Nation properties (including the Quality Inn in Page and Twin Arrow Casino) were used to more accurately classify visitors as overnight on the Nation or day trip (for their entire trip) or in relation to the Nation where visitors stayed in places such as Page, Flagstaff, Grand Canyon, or Utah. Applying these proportions to the visitor estimate yields 1,260,000 day and 740,000 overnight visitors who stayed between 1 and 60 days on the Navajo Nation (Table 51). The average length of stay was two days (Table 6).

Table 51. Day and Overnight Visitors by Estimated Visitor Volumes on Navajo Nation

	Frequency	Percent	Population Estimate
Overnight in NN	451	37%	740,000
Day Trip in NN*	769	63%	1,260,000
Total	1,220	100%	2,000,000

*55% of the total stayed overnight off NN; 8% were day trip visitors

All overnight visitors were assigned to three types of overnight accommodations: Hotel/Motel, Campground/RV Park, and All other accommodations. The data show that the majority of overnight visitors (70%) stayed in a Hotel/Motel, while 16% stayed in a campground/RV park, and the remaining 14% stayed in other accommodations. These percentages are then applied to all overnight visitors to produce sub-population estimates for overnight visitors, yielding

518,000 hotel/motel visitors, 118,400 campground/RV park visitors and 103,600 other accommodations (including staying with friends and relatives on NN), resulting in a total of 740,000 overnight visitors.

Spending profiles were developed for the various visitor segments, day visitors and overnight visitors. In order to generate the most valid visitor spending profiles, overnight expenditures were limited to those respondents who stayed no more than three nights on the Navajo Nation. This decision was based on the fact that the mean (average) length of stay was 2.2 nights, visitors who stayed 3 or fewer nights also accounted for 88 percent of all overnight visits. Overnight visitor expenditure profiles were then calculated for all visitors who stayed three nights or less by each of the three accommodation types. A visitor expenditure profile for day visitors was also calculated based on all day visitors. Since all expenditure are on a per trip basis and all expenditures are collected as travel party expenditures, the expenditures were converted to per-person per-trip expenditures by dividing by the average party size of 2 persons. The median or the value at the midpoint of the spending categories' frequency distribution is used, as the measurement is less influenced by extremely high or low values, whereas, the mean or average is strongly affected by extremely high or low values. The median, therefore yields a more conservative estimate without the potential bias introduced by the mean. See Table 52.

Table 52. Median Spending of Visitors to the Navajo Nation per day/night \$ per visitor

Spending Categories	Visitor Segments for NN			
	Day Visitor in NN	Hotel/Motel in NN	Campground/ RV park in NN	All other accommo- dations in NN
	n=1,260,000	n=518,000	n=118,400	n=103,600
Lodging / Camping	\$0	\$100	\$25	\$55
Restaurants	\$50	\$35	\$23	\$25
Other Food / Groceries	\$25	\$13	\$20	\$14
Transportation	\$25	\$25	\$27	\$15
Recreation Entertainment / Attractions	\$50	\$41	\$25	\$25
Shopping	\$25	\$25	\$30	\$13
Per person per day expenditures	\$175	\$239	\$150	\$147

Spending is calculated by multiplying median expenditures by the population estimate and correcting by the percentage of visitors who have expenditures in each specific category. Not all visitors have expenditures in all categories and it would be incorrect to apply all expenditures to every visitor. Total expenditures for an estimated 2 million visitors to the Navajo Nation over eight-months in 2018 is \$212,018 million, of which \$110.9 million are from day visitors and \$101.1 are from overnight visitors. In 2011, \$112 million was estimated for a twelve-month period for fewer visitors but a higher proportion of overnight visitors were included. See Table 53.

Table 53. Total Spending of day and overnight visitors to the Navajo Nation (\$1000s)

Median	Day Trip (\$1,000s)	Overnight (\$1,000s)	Total
Total Visitors	1,260,000	740,000	2,000,000
Spending Totals			
Lodging	\$0	\$44,978	\$44,978
Restaurant	\$33,768	\$17,036	\$50,804
Grocery	\$13,658	\$4,981	\$18,640
Transport	\$18,648	\$12,289	\$30,937
Recreation	\$34,474	\$14,496	\$48,969
Shopping	\$10,382	\$7,308	\$17,690
Total	\$110,930	\$101,088	\$212,018

The total expenditures are further segmented by visitor type, i.e., day visitors and overnight visitors. For example, overnight visitor expenditures for each of the accommodations types is derived by multiplying visitor estimates from Table x2., by the spending profiles for each accommodations type, corrected by the percentage of visitors with expenditures in the category. Table 54 is only for overnight visitors, day visitor expenditure totals are found in Table 53.

Table 54. Total Spending of Overnight Visitors only to the Navajo Nation by Type of Accommodations (\$1000s)

Total	Hotel/Motel (\$1000s)	Campground/RV park (\$1000s)	All other accommodations (\$1000s)	Total (\$1000s)
Total Visitors	518,000	118,400	103,600	740,000
Spending Totals				
Lodging	\$39,536	\$2,302	\$3,140	\$44,978
Restaurant	\$13,386	\$1,853	\$1,797	\$17,036
Grocery	\$2,748	\$1,316	\$918	\$4,981
Transport	\$8,674	\$2,442	\$1,173	\$12,289
Recreation	\$11,512	\$1,768	\$1,216	\$14,496
Shopping	\$5,487	\$1,381	\$440	\$7,308
Total	\$81,342	\$11,062	\$8,683	\$101,088

These expenditures are then applied to an Implan Model of the Arizona portion of the Navajo Nation derived from zip code regional data. Table 55, lists the expenditure totals in terms of expenditures per 10,000 visitors for day visitors and the three accommodation types by expenditure category (sales) and jobs. These figures are useful for any projections when visitor levels can be estimated in 2019, 2020, etc. Sales are the sales associated with tourist spending of firms within the region (Navajo Nation). Jobs are the number of jobs in the region supported by tourist spending. Job estimates are not full time equivalents but include part time and

seasonal jobs. Note that values for “direct sales” in Table 55., are less than the total spending in Table 54. Only the retail portion of the visitor expenditures will occur for some types. For those purchases, the cost of producing the product (e.g., refining the gasoline) immediately “leaks,” out of the region because the product (refined gasoline) is not made within the region. For instance every 10,000 visitors to the Navajo Nation who stay in a hotel/motel generates about \$6,890 million in sales, and supports 816 jobs. The secondary effects (indirect and induced impacts) yields a further \$2,018 million in sales and supports a further 129 jobs, for a total economic impact of \$8.9 million in sales and 944 jobs supported. See Table 55.

Table 55. Total Economic Impacts for the Navajo Nation by Day and Overnight trips and Types of Accommodations (10,000 visitors)

Sector Impacts	10,000 party Day trip		10,000 visitors Hotel/Motel		10,000 visitors RV/Camp		10,000 visitors All other accommodations	
	(\$1000s)	Jobs	(\$1000s)	Jobs	(\$1000s)	Jobs	(\$1000s)	Jobs
Lodging	\$0	0	\$3,349	396	\$151	19	\$245	29
Restaurant	\$2,416	272	\$1,134	134	\$121	15	\$140	17
Recreation	\$2,466	277	\$975	115	\$116	14	\$95	11
<u>Retail</u>								
<u>Trade</u>	<u>\$3,054</u>	<u>343</u>	<u>\$1,432</u>	<u>170</u>	<u>\$337</u>	<u>42</u>	<u>\$197</u>	<u>23</u>
Direct Effects	\$7,935	892	\$6,890	816	\$725	90	\$676	80
<u>Secondary Effects</u>								
<u>Effects</u>	<u>\$2,496</u>	<u>154</u>	<u>\$2,018</u>	<u>129</u>	<u>\$221</u>	<u>14</u>	<u>\$196</u>	<u>12</u>
Total Effects	\$10,431	1047	\$8,908	944	\$946	104	\$873	93

CONCLUSION

The Navajo Nation is a popular destination for visitors from the US and abroad. NN visitors tend to travel with others, stay one to two day(s) on the reservation and visit a wide range of attractions. Both natural and cultural attractions are significant assets for the tribe and are rated highly as destinations within the NN. Visitors generally have a very positive perception of the tribal community and its tourism products and services, and the majority of visitors expressed a high level of satisfaction in all aspects of their travel experience, regardless of when they visited or what areas of the reservation they visited. This is also reflected in the majority’s desire to recommend the NN as a vacation destination to their friends and family members. It is also reflected in the fact that the vast majority of NN visitors said they would like to visit the NN again in the future.

The Navajo Nation is a popular destination in the US Southwest. Using the estimate from the 2011 report, it appears that visitation to the Nation has increased in the last seven to eight years. Total expenditures for an estimated 2 million visitors to the Navajo Nation over eight-months in 2018 is \$212 million, of which \$110.9 million are from day visitors and \$101.1 are from overnight visitors. In 2011, \$112 million was estimated for a twelve-month period for fewer visitors but a higher proportion of overnight visitors were included.

The Navajo Nation is a land of beautiful nature, fascinating ancient culture, and engaging outdoor activities. Given the results of this study, the NN also has salient potential for growing tourism in a responsible and sustainable way to help the NN develop socially and economically for its community members while protecting all the natural and cultural resources of its people.

Appendix B: ASU IRB Approval



EXEMPTION GRANTED

Megha Budruk
 Community Resources and Development, School of
 602/496-0171
 Megha.Budruk@asu.edu

Dear Megha Budruk:

On 1/31/2018 the ASU IRB reviewed the following protocol:

Type of Review:	Initial Study
Title:	AOT Navajo Nation Visitor and Economic Impact Survey 2018
Investigator:	Megha Budruk
IRB ID:	STUD Y00007620
Funding:	Name: Arizona Office of Tourism; Name: Navajo Nation
Grant Title:	
Grant ID:	
Documents Reviewed:	<ul style="list-style-type: none"> • AOT NN Map with study sites.pdf, Category: Other (to reflect anything not captured above); • AOT NN Recruitment script.pdf, Category: Recruitment Materials; • AOT NN NNHRBB letter of support.pdf, Category: Off-site authorizations (school permission, other IRB approvals, Tribal permission etc); • AOT NN HRP-503a.docx, Category: IRB Protocol; • AOT NN Sampling Frame.pdf, Category: Other (to reflect anything not captured above); • Navajo Nation survey 20180124.pdf, Category: Measures (Survey questions/Interview questions /interview guides/focus group questions);

The IRB determined that the protocol is considered exempt pursuant to Federal Regulations 45CFR46 (2) Tests, surveys, interviews, or observation on 1/31/2018.

In conducting this protocol you are required to follow the requirements listed in the INVESTIGATOR MANUAL (HRP-103).

Sincerely,

IRB Administrator

Appendix C: NNHRRB Letter of Support



THE NAVAJO NATION

RUSSELL BEGAYE PRESIDENT
JONATHAN NEZ VICE PRESIDENT

November 28, 2017

Corrina Jymm
Navajo Nation Tourism Department
Navajo Nation

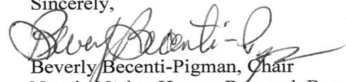
Dear Ms. Jymm,

This letter shall serve as the Navajo Nation Human Research Review Board (NNHRRB) Letter of Support for the Navajo Tourism Department on 2017 *Navajo Visitor Survey, a planning tool for Promotional Ad*. Your Navajo Visitors Survey does not meet the Navajo Nation Human Research Code, therefore does not need Navajo Nation Human Research Review Boards Application Approval.

Navajo Nation Human Research Board is in full support of your Department Function to Promote Tourism on the Navajo Nation. In addition, the NNHRRB would to receive a courtesy copy of the final survey results. Good Luck and Best Wishes.

If you should need any additional documents on this matter, please do contact Michael Winney, IRB Coordinator for Navajo Research Program Office at 928-871-6929 or myself at 928-697-2525. Thank you.

Sincerely,


Beverly Becenti-Pigman, Chair
Navajo Nation Human Research Board
Navajo Department of Health

Cc: NNHRRB file.

Yes _____ No _____

Approved by park official:

Date Approved:

Jayal M. [Signature]
Title: Deputy
~~Acting~~ Superintendent

4/11/18

I Agree To All Conditions And Restrictions Of this Permit As Specified
(Not valid unless signed and dated by the principal investigator)

[Signature]
(Principal investigator's signature)

3-21-18
(Date)

THIS PERMIT AND ATTACHED CONDITIONS AND RESTRICTIONS MUST BE CARRIED AT ALL TIMES WHILE CONDUCTING RESEARCH ACTIVITIES IN THE DESIGNATED PARK(S)

Appendix D: Visitor Survey-Sites



Navajo Nation Visitor and Economic Impact Survey 2018



Thank you for agreeing to participate in this study. We are interested in knowing more about our visitors so we can better meet your needs. You are one of a small number of visitors who has been asked to take part in this study, so your responses are of great importance. We are asking that you fill out this questionnaire, which will take about 15 minutes. Your participation is voluntary. Return of this questionnaire will be considered your consent to participate. There is no penalty or negative consequence if you decide to withdraw from the study. If you do return the questionnaire, you are assured of complete anonymity. All the information collected will be grouped together and used for statistical purposes only. While we may use the information we collect in reports and publications, at no time will your name be released or associated with your responses.

If you have any questions concerning the research study, please contact Megha Budruk at Megha.Budruk@asu.edu. If you have any questions about your rights as a subject/ participant in this research, or if you feel that you have been placed at risk, you can contact the Chair of Human Subjects Institutional Review Board, through the ASU Office of Research Integrity and Assurance, at (480) 965-6788.



Date:

Location:

Surveyor:

Part 1: First, we would like to ask you some questions about your current and future visits to the Navajo Nation.

1. Before this trip, had you ever visited the Navajo Nation (Reservation)?

- YES NO

Is the Navajo Nation the primary destination for your trip?

- YES NO - If no, what location is the primary destination of your trip?

2. How long is your entire trip away from home? Day trip only _____ Hours

- Away from home _____ Nights On the Navajo Nation _____ Nights

3. In what town or location did you spend last night? _____

What type of accommodations did you use last night? (Select/Choose the best answer)

- | | |
|---|---|
| <input type="checkbox"/> Hotel/Motel | <input type="checkbox"/> Other bed and breakfast |
| <input type="checkbox"/> Campground/ RV Park | <input type="checkbox"/> Private home |
| <input type="checkbox"/> Navajo hogan bed and breakfast | <input type="checkbox"/> Hostel |
| <input type="checkbox"/> Airbnb | <input type="checkbox"/> Other (Please specify) _____ |

4. In what town or location will you spend tonight? _____

What type of accommodations will you use tonight? (Select/Choose the best answer)

- | | |
|---|---|
| <input type="checkbox"/> Hotel/Motel | <input type="checkbox"/> Other bed and breakfast |
| <input type="checkbox"/> Campground/ RV park | <input type="checkbox"/> Private home |
| <input type="checkbox"/> Navajo hogan bed and breakfast | <input type="checkbox"/> Hostel |
| <input type="checkbox"/> Airbnb | <input type="checkbox"/> Other (Please specify) _____ |

5. Including yourself, how many people are in your travel party? (Fill in with a number or zero)

Number of men _____ Number of women _____ Number of children under 18 _____

6. Are you on an organized tour?

- YES NO

7. What type of transportation are you using during this trip? (Mark all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Own car/Motorcycle | <input type="checkbox"/> Bus/ Motor coach |
| <input type="checkbox"/> Rental car/Motorcycle | <input type="checkbox"/> Airplane |
| <input type="checkbox"/> Own Camper/RV | <input type="checkbox"/> Bicycle |
| <input type="checkbox"/> Rental Camper/RV | <input type="checkbox"/> Other (please specify) _____ |

If you rented a vehicle, in what city did you pick up your vehicle? _____

8. How important were each of the following sources of travel information in planning your trip to Navajo Nation? (Circle one number for each item)

Information Sources	Not at all important	Slightly important	Important	Very important	Extremely important
Magazine article	1	2	3	4	5
Magazine advertisement	1	2	3	4	5
Newspaper article	1	2	3	4	5
Newspaper advertisement	1	2	3	4	5
Movie/TV show	1	2	3	4	5
TV commercials	1	2	3	4	5
Radio advertisement	1	2	3	4	5
Novel	1	2	3	4	5
Brochure/ fliers	1	2	3	4	5
Tour operator	1	2	3	4	5
Tourist information center	1	2	3	4	5
Travel guide book	1	2	3	4	5
Road-side sign	1	2	3	4	5
Travel agent	1	2	3	4	5
Friends/family	1	2	3	4	5
Motor club (AAA)	1	2	3	4	5
State Parks	1	2	3	4	5
Navajo Parks & Rec Dept.	1	2	3	4	5
National Park Service	1	2	3	4	5
New Mexico Dept. of Tourism	1	2	3	4	5
Arizona Office of Tourism	1	2	3	4	5
Travel blogs	1	2	3	4	5
Facebook	1	2	3	4	5
Instagram	1	2	3	4	5
Twitter	1	2	3	4	5
YouTube	1	2	3	4	5
Other _____	1	2	3	4	5

9. Did you use any of the following resources or assistance provided by Navajo Tourism Development?

- Discover Navajo Nation website Visitor Guide Telephone Response/assistance
- I did not use any of these resources

10. Why did you want to visit the Navajo Nation? Please rate the importance of each of the following reasons.

I am visiting the Navajo Nation to:	Not at all important	Slightly important	Important	Very important	Extremely important
Experience new and different places	1	2	3	4	5
Learn about nature	1	2	3	4	5
Get away from everyday life	1	2	3	4	5
For excitement/adventure	1	2	3	4	5
Spend time with family/friends	1	2	3	4	5
Learn about archaeology	1	2	3	4	5
Enjoy nice weather	1	2	3	4	5
To engage in leisure activities	1	2	3	4	5
Experience nature	1	2	3	4	5
Learn about culture and history	1	2	3	4	5
Be physically active	1	2	3	4	5
See interesting sights	1	2	3	4	5
Be with people who share my values	1	2	3	4	5
Experience other cultures	1	2	3	4	5
Engage in business activities	1	2	3	4	5
Have an authentic experience of Navajo culture	1	2	3	4	5
Learn about Navajo traditions	1	2	3	4	5
Experience a connection with Navajo culture	1	2	3	4	5
Develop personal, spiritual values	1	2	3	4	5
Experience solitude	1	2	3	4	5

11. Indicate all the sites/attractions that you are aware of, and have visited or will visit on or near the Navajo Nation during your trip. (Mark all the boxes that apply)

	Am aware of	Have or will visit
Navajo Arts and Crafts Enterprises (one or more of 7 locations AZ & NM)	<input type="checkbox"/>	<input type="checkbox"/>
Four Corners Monument (AZ, NM, CO, UT)	<input type="checkbox"/>	<input type="checkbox"/>
Monument Valley Tribal Park (Monument Valley, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Navajo Nation Monument (NPS – near Kayenta, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Elephant Feet (Tonalea, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Antelope Canyon (near Page, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Dinosaur Tracks (Tuba City, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Explore Navajo Interactive Museum (Tuba City, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Little Colorado River Gorge Overlook (near Cameron, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Canyon de Chelly NM (NPS – Chinle, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Dine College – Hatathlie Museum (Tsaile, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Wheatfields Lake (Tsaile/Chinle Area, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Hubbell Trading Post NHS (NPS – Ganado)	<input type="checkbox"/>	<input type="checkbox"/>
Red Rock Park (Church Rock, NM)	<input type="checkbox"/>	<input type="checkbox"/>
Bisti/De-na-zin Wilderness (NM)	<input type="checkbox"/>	<input type="checkbox"/>
Chaco Culture National Historical Park (NM)	<input type="checkbox"/>	<input type="checkbox"/>
Window Rock Tribal Parks & Veterans Memorial (AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Shiprock Peak (Shiprock, NM)	<input type="checkbox"/>	<input type="checkbox"/>
Window Rock Tribal Zoo (AZ)	<input type="checkbox"/>	<input type="checkbox"/>

Other (Please specify) _____

12. What are the primary leisure activities you are engaged in during your visit to the Navajo Nation? (mark all that apply)

- | | |
|--|--|
| <input type="checkbox"/> General sightseeing | <input type="checkbox"/> Shopping |
| <input type="checkbox"/> Boating/rafting | <input type="checkbox"/> Fishing |
| <input type="checkbox"/> Hunting | <input type="checkbox"/> Visiting parks |
| <input type="checkbox"/> Group tour | <input type="checkbox"/> Watch sports events |
| <input type="checkbox"/> Picnicking | <input type="checkbox"/> Attending festivals/ events |
| <input type="checkbox"/> Attending tribal fair/ pow wow | <input type="checkbox"/> Swimming/ water sports |
| <input type="checkbox"/> Star gazing | <input type="checkbox"/> Looking at/ buying arts and crafts |
| <input type="checkbox"/> Visiting historical areas/ historical sites | <input type="checkbox"/> Visiting friends and relatives |
| <input type="checkbox"/> Eating traditional Navajo foods | <input type="checkbox"/> Attending rodeo |
| <input type="checkbox"/> Visiting museums | <input type="checkbox"/> Bicycling |
| <input type="checkbox"/> Horseback riding | <input type="checkbox"/> Photography |
| <input type="checkbox"/> Camping | <input type="checkbox"/> Hiking/ walking |
| <input type="checkbox"/> Attending cultural/ educational seminar | <input type="checkbox"/> Road Scholar (formerly Elderhostel) |
| <input type="checkbox"/> Family activities | <input type="checkbox"/> Children's activities |
| <input type="checkbox"/> Educational activities | <input type="checkbox"/> Gaming/ casino |
| <input type="checkbox"/> Other (Please specify) _____ | |

Part 2: Next, we are interested in the quality of your experiences while on the Navajo Nation. Please answer the following questions.

13. Please tell us how satisfied you are with these specific aspects of your visit to the Navajo Nation.

Please tell us how satisfied you are with:	Not at all satisfied	Slightly satisfied	Satisfied	Very satisfied	Extremely satisfied
Friendliness of local merchants and service providers	1	2	3	4	5
Access to restroom facilities	1	2	3	4	5
Travel information availability	1	2	3	4	5
Friendliness of local people	1	2	3	4	5
Value for money	1	2	3	4	5
Quality of restaurants	1	2	3	4	5
Quality of lodging	1	2	3	4	5
Quality of highways and roads	1	2	3	4	5
Availability of adequate parking	1	2	3	4	5
Availability of Navajo products and souvenirs	1	2	3	4	5
Quality of Navajo products and souvenirs	1	2	3	4	5
Customer service at tourism businesses	1	2	3	4	5
Directional signage on the Navajo Nation	1	2	3	4	5
Feelings of personal safety	1	2	3	4	5
Attractiveness of built facilities	1	2	3	4	5
Scenic attractiveness of the Navajo Nation	1	2	3	4	5
Domestic animal control/welfare	1	2	3	4	5
Other (Please specify) _____	1	2	3	4	5

14. On a scale of 1-10 where 1=poor and 10=excellent, how would you rate the Navajo Nation on (write a number from 1-10 on lines below)
 Overall visit _____ Value for money _____

15. On a scale of 1-5, please indicate the extent to which you feel that the Navajo Nation provides an authentic experience of Navajo culture (please circle the appropriate number)

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1	2	3	4	5

16. Do you plan to return to the Navajo Nation in your lifetime? YES NO
 Please share your reasons:

17. Would you recommend a visit to the Navajo Nation to others? YES NO

Please share your reasons:

Part 3: This next section focuses on the economic impact of the Navajo Nation portion of your visit.

18. Please estimate as closely as possible the TOTAL amount of money your travel party spent (or will spend) directly on the Navajo Nation for the following categories (in U.S. dollars):

Lodging/Camping \$ _____

Restaurants \$ _____

Other food/groceries \$ _____

Transportation, including gas \$ _____

Recreation Entertainment/Attractions \$ _____

(Including entrance fees and permits)

Shopping \$ _____



What was the purpose of your purchases? (Check all that apply)

- Gifts Collection
 Souvenirs Other _____

What types of purchases did you make? (Check all that apply)

- Traditional clothing Art Books
 Other apparel Pottery Rugs
 Jewelry Crafts Personal items (toiletries etc.)
 Other (please specify): _____

19. Did you purchase fuel on the Navajo Nation? YES NO

20. Did fuel costs affect your purchases on this trip? YES NO

Part 4: Next, we are interested in your awareness and observations regarding the Navajo Nation Protocol for visitor behavior

21. Are you aware of the Navajo Nation protocol for visitor behavior?

- YES NO - If No, skip to 23.

If YES, where did you get this information? _____

22. If you have looked at the protocol, to what extent did it help you improve your awareness of:

	Not at all	Slightly	Somewhat	Moderately	Extremely
Appropriate behavior	1	2	3	4	5
The Navajo way of life	1	2	3	4	5
Reasons for restrictions to certain activities	1	2	3	4	5
Law enforcement jurisdiction	1	2	3	4	5

23. During your visit, how frequently did you observe visitors:

	Never	Rarely	Sometimes	Often	Always
Entering areas that are off limits	1	2	3	4	5
Straying off designated trails and established routes	1	2	3	4	5
Traveling off road using all terrain vehicles (ATVs)	1	2	3	4	5
Rock climbing	1	2	3	4	5
Removing something such as animals, plants, rocks or artifacts off the land	1	2	3	4	5
Littering	1	2	3	4	5

Part 5: Finally, this last set of questions focus on visitor socio-demographics.

24. If you are from the U.S., what is your Zip Code? _____

If you are not from the U.S. what country are you from? _____

25. Mark the category that best describes your household income before taxes in 2017.

- Less than \$14,999
- \$15,000-\$19,999
- \$20,000-\$29,999
- \$30,000-\$39,999
- \$40,000-\$49,999
- \$50,000-\$59,999
- \$60,000-\$69,999
- \$70,000-\$79,999
- \$80,000-\$89,999
- \$90,000-\$99,999
- \$100,000 - \$109,999
- \$110,000 - \$124,999
- \$125,000+

26. In what year were you born? _____

27. What is your gender? Male Female

28. Mark the category that best represents the highest level of education you have attained.

- Less than high school
- High school graduate
- Some college
- Associate/Technical degree (2 year degree)
- College Degree (4 year degree)
- Post graduate

Thank you!

Appendix E: Visitor Survey-Event



Navajo Nation Visitor and Economic Impact Event Survey 2018

Thank you for agreeing to participate in this study. We are interested in knowing more about our visitors so we can better meet your needs. You are one of a small number of visitors who has been asked to take part in this study, so your responses are of great importance. We are asking that you fill out this questionnaire, which will take about 15 minutes. Your participation is voluntary. Return of this questionnaire will be considered your consent to participate.

First, we would like to ask you some questions about your current and future visits to the Navajo Nation Reservation.

1. Before this trip, had you ever visited the Navajo Nation?
 YES NO

 Is the Navajo Nation the primary destination for your trip? YES NO - If no, what location is the primary destination of your trip?

2. How long is your entire trip away from home? (*check one answer and fill in number of hours or nights*)
 Day trip only _____ Hours
 Away from home _____ Nights
 On the Navajo Nation _____ Nights
3. In what town or location did you spend last night?

 What type of accommodations did you use last night? (*Select/Choose the best answer*)
 Hotel/Motel Other bed and breakfast
 Campground/RV Park Private home
 Navajo hogan bed and breakfast Hostel
 Airbnb Other (*Please specify*)

4. Including yourself, how many people are in your travel party? (*Fill in with a number or zero*)
 Number of men _____ Number of women _____
 Number of children under 18 _____
5. Are you on an organized tour? YES NO
6. Did you use any of the following resources or assistance provided by Navajo Tourism Development? (*check all that apply*)
 Discover Navajo Nation website
 Visitor Guide
 Telephone Response/Assistance

 I did not use any of these resources

7. Why did you want to visit the Navajo Nation? Please rate the importance of each of the following reasons.

I am visiting the Navajo Nation to:	Not at all important	Slightly important	Important	Very important	Extremely important
Experience new and different places	1	2	3	4	5
Learn about nature	1	2	3	4	5
Get away from everyday life	1	2	3	4	5
For excitement/adventure	1	2	3	4	5
Spend time with family/friends	1	2	3	4	5
Learn about archaeology	1	2	3	4	5
Enjoy nice weather	1	2	3	4	5
To engage in leisure activities	1	2	3	4	5
Experience nature	1	2	3	4	5
Learn about culture and history	1	2	3	4	5
Be physically active	1	2	3	4	5
See interesting sights	1	2	3	4	5
Be with people who share my values	1	2	3	4	5
Experience other cultures	1	2	3	4	5
Engage in business activities	1	2	3	4	5
Have an authentic experience of Navajo culture	1	2	3	4	5
Learn about Navajo traditions	1	2	3	4	5
Experience a connection with Navajo culture	1	2	3	4	5
Develop personal, spiritual values	1	2	3	4	5
Experience solitude	1	2	3	4	5

Date:

Location:

Surveyor:

8. Indicate all the sites/attractions that you are aware of, and have visited or will visit on or near the Navajo Nation during this trip. (Mark all the boxes that apply)

	Am aware of	Have or will visit on this trip
Navajo Arts and Crafts Enterprises (one or more of 7 locations AZ & NM)	<input type="checkbox"/>	<input type="checkbox"/>
Four Corners Monument (AZ, NM, CO, UT)	<input type="checkbox"/>	<input type="checkbox"/>
Monument Valley Tribal Park (Monument Valley, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Navajo Nation Monument (NPS – near Kayenta, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Elephant Feet (Tonalea, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Antelope Canyon (near Page, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Dinosaur Tracks (Tuba City, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Explore Navajo Interactive Museum (Tuba City, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Little Colorado River Gorge Overlook (near Cameron, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Canyon de Chelly NM (NPS – Chinle, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Dine College – Hatathlie Museum (Tsaile, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Wheatfields Lake (Tsaile/Chinle Area, AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Hubbell Trading Post NHS (NPS – Ganado)	<input type="checkbox"/>	<input type="checkbox"/>
Red Rock Park (Church Rock, NM)	<input type="checkbox"/>	<input type="checkbox"/>
Bisti/De-na-zin Wilderness (NM)	<input type="checkbox"/>	<input type="checkbox"/>
Chaco Culture National Historical Park (NM)	<input type="checkbox"/>	<input type="checkbox"/>
Window Rock Tribal Parks & Veterans Memorial (AZ)	<input type="checkbox"/>	<input type="checkbox"/>
Shiprock Peak (Shiprock, NM)	<input type="checkbox"/>	<input type="checkbox"/>
Window Rock Tribal Zoo (AZ)	<input type="checkbox"/>	<input type="checkbox"/>

9. On a scale of 1-10 where 1=poor and 10=excellent, how would you rate the Navajo Nation on:
(write a number from 1-10 on both lines)

Overall visit _____ Value for money _____

10. On a scale of 1-5, please indicate the extent to which you feel that the Navajo Nation provides an authentic experience of Navajo culture (please circle the appropriate number)

Strongly disagree Disagree Neutral Agree Strongly agree
1 2 3 4 5

11. Do you plan to return to the Navajo Nation in your lifetime? YES NO

Please share your reasons:

12. Would you recommend a visit to the Navajo Nation to others? YES NO

Please share your reasons:

This next section focuses on the economic impact of the Navajo Nation portion of your visit.

13. Please estimate as closely as possible the TOTAL amount of money your travel party spent (or will spend) directly on the Navajo Nation for the following categories (in US\$):

Lodging/Camping \$ _____
 Restaurants \$ _____
 Other food/groceries \$ _____
 Transportation, including gas \$ _____
 Recreation & Entertainment/Attractions \$ _____
 (Including entrance fees and permits)
 Shopping \$ _____

What was the purpose of your purchases? (Check all that apply)

- Gifts Collection
 Souvenirs Other _____

What types of purchases did you make? (Check all that apply)

- Traditional clothing Art Books
 Other apparel Pottery Rugs
 Jewelry Crafts
 Personal items (toiletries etc.)
 Other (please specify): _____

Next, we are interested in your awareness and observations regarding the Navajo Nation Protocol for visitor behavior

14. Are you aware of the Navajo Nation protocol for visitor behavior? NO YES

If YES, where did you get this information?

Finally, this last set of questions focus on visitor socio-demographics.

15. If you are from the U.S., what is your Zip Code?

If you are not from the U.S. what country are you from?

16. Mark the category that best describes your household income before taxes in 2017.

< \$14,999 \$50,000-\$59,999 \$100,000 - \$109,999
 \$15,000-\$19,999 \$60,000-\$69,999 \$110,000 - \$124,999
 \$20,000-\$29,999 \$70,000-\$79,999 \$125,000+
 \$30,000-\$39,999 \$80,000-\$89,999
 \$40,000-\$49,999 \$90,000-\$99,999

17. In what year were you born? _____

18. What is your gender? Male Female

19. Mark the category that best represents the highest level of education you have attained. (check one)

Less than high school Associate/Technical degree (2 yr.)
 High school graduate College degree (4 yr. degree)
 Some college Post graduate

Thank you!