

A R I Z O N A

Arizona
Humanities
Council



Cultural Heritage
Tourism Study

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*There was
something
for my
entire family.*

Survey respondent

”

The Study: An Overview

The Cultural Heritage Tourism Study was commissioned and funded by the Arizona Office of Tourism to generate information about cultural heritage tourists in Arizona. Data was collected from October 2004 to September 2005 at 18 sites and three festivals located throughout the state. Sites were selected by the Arizona Office of Tourism and staff of the Arizona Humanities Council in consultation with the research team led by Kathleen Andereck, Ph.D., and Evelyn Ng, Graduate Research Associate, Department of Recreation and Tourism Management, Arizona State University. Sites emphasized Arizona history and culture, including a Native American and/or Hispanic focus.

Twenty randomly selected survey days were selected throughout the year. Target sample sizes were 200 at each site, with 60% targeted to out-of-state visitors. Data was also collected at the three events. In addition, 1,980 out-of-state visitors were contacted throughout the year with 1,046 returning their questionnaires for a response rate of 54 percent. The response rate for in-state visitors was 44%, with 892 returns out of 2,035 questionnaires. Total response rate was 48%. Among out-of-state visitors, most U.S. states and Canadian provinces were represented as well as Australia, Belgium, United Kingdom, France, Germany, Hungary, Italy, New Zealand and Sweden. The most frequently mentioned U.S. states of origin were California, Colorado, Florida, Michigan, Minnesota, New Mexico, New York, Ohio, Oregon, Pennsylvania, Texas, Washington and Wisconsin.



The Douglas Mansion at Jerome State Historic Park is a popular Jerome landmark built by James S. Douglas in 1916. High on a hilltop, it is located just above the Little Daisy (copper) mine.

The study found that visitors to northern Arizona sites were more likely to be from Florida or Pennsylvania, while visitors to Maricopa County were more likely to come from New York, the Midwest, the Pacific Northwest or

New Mexico. Northern and Southern Arizona attracted visitors from California, Colorado and Texas. Southern Arizona also attracted Midwesterners as well as Canadians and residents of New Mexico and the Pacific Northwest.

Fifty-eight percent of the respondents said they were highly motivated to visit Arizona either to learn about Arizona's history and culture or experience other cultures. The data also confirmed that cultural heritage attractions enhance the quality of life for residents. Arizonans reported that the benefits of cultural heritage tourism include feeling connected to the state's cultural heritage and a more fulfilling lifestyle. Both in-state and out-of-state travelers reported high satisfaction ratings with their visits and with Arizona's cultural heritage tourism experience.

Survey Sites

Site	Location	Type
Desert Caballeros Western Museum	Wickenburg	Western art/history
Heard Museum	Phoenix	Native American culture
Pueblo Grand Museum	Phoenix	Native American culture
Taliesin West	Scottsdale	Arizona history/architecture
Casa Malpais Ruins	Springerville	Native American culture
Jerome State Historic Park	Jerome	Arizona history
John Wesley Powell Museum	Page	Arizona history
Museum of Northern Arizona	Flagstaff	Native American culture
Sharlot Hall Museum	Prescott	Arizona history
Amerind Foundation Museum	Dragoon	Native American culture
Arizona Historical Society Museum	Tucson	Arizona history
Bisbee Mining and Historical Museum	Bisbee	Arizona history
Pima Air and Space Museum	Tucson	Arizona/Aerospace history
Mission San Xavier del Bac	Tucson	Arizona history/Native American & Hispanic culture
Pueblo Grande Museum Indian Market	Phoenix	Native American art/culture
International Mariachi Conference Fiesta Garibaldi	Tucson	Hispanic culture
Sharlot Hall Folk Art Festival	Prescott	Arizona/western history

Key findings: A Summary:



Perhaps the biggest benefit of cultural heritage tourism is that opportunities increase for diversified economies, ways to prosper economically while holding on to the characteristics that make communities special.

Partners in Tourism, Culture and Commerce by the National Trust for Historic Preservation





*I am a 6-foot,
196 pound sexy
senior citizen.*

Survey respondent



Who Are Arizona Cultural Heritage Travelers?

Generally, they are:

- married couples

- average 56 years of age

- have no children at home

- are well educated and

- whether retired or working full time, enjoy fair-to-high household income

- travel in couples although the median party size was 3

Demographically, they mirror the second-largest group of visitors to the state.

According to the Arizona Office of Tourism, in 2005, visitors 55 years and older represented 37% of the domestic overnight leisure market, an increase over previous years.

Like the largest segment of visitors (34-54 age), 55+ year leisure travelers contribute a relatively higher dollar share per trip, making them valued visitors.

Of all Arizona domestic leisure visitors to Arizona, 41% are couples.

Ninety-one percent (91%) of out-of-state visitors and 93% of in-state visitors had visited another cultural heritage venue in the six months preceding their visit to the site at which they were contacted. Half had visited two or more cultural sites or events in the preceding six months; the remaining 20% had visited six or more cultural sites or events during that same period.

What this means for you:

Older travelers have seen and done a lot.

They understand the difference between faux and authentic experiences.

They know and appreciate quality.

Questions to consider:

Is your information accurate and/or factually correct?

Is it timely?

Have you made it relevant to these visitors?

Have you made your attraction come alive by introducing visitors to real people, either through your exhibits or demonstrations?

Do your exhibits and/or displays look up to date?

“
Butter churning
and biscuit making
and baking [were]
fascinating and
educational and
enjoyable to watch.
Loved watching
children grind corn
on the rocks.”

From survey at
Sharlot Hall Folk
Art Fair

”

Families find much to enjoy at the Bisbee Mining and Historical Museum, a gem of a museum located in Southeastern Arizona.



“
We really like
Native American
arts and the
fry bread was
awesome too.

from survey at
Pueblo Grande
Indian Market

”

They have a higher degree of education and higher-than-average income which makes them curious and possibly more interested in intellectual pursuits.

Cultural heritage travelers want to learn and understand.

They want rich context in addition to good factual content.

This information can be delivered in many ways, as signs, exhibit interpretations or commentary.

Because they like to shop, they contribute to the state's economy.

Out-of-state cultural heritage travelers spend an estimated \$2 billion annually in the state.

In-state visitors pump another \$6 million or more into the economy every year.

Questions to consider:

Is your interpretive signage encouraging thought or promoting conversation?

Are your docents or guides friendly and well-informed?

Is your book store a well-stocked source for more information?

Does your gift shop sell authentic arts and crafts?

Do you offer items at a variety of price points, including high end?

These travelers usually travel as couples and seek comfortable accommodations that enhance their experience.

Partnering with historic properties or cultural experiences in your area will add value to the overall cultural heritage tourism experience as will thoughtful planning that takes their needs into account.

Questions to consider:

Does your café or restaurant offer healthy choices for older visitors?

Are there local restaurants that cater to older travelers with a menu that includes salt or sugar-free entrees that you can recommend?

Are your restroom and eating facilities clean?

Do you include any personal touches such as hand lotion or a fresh flower?


Is water easily available for your visitors?

Do you have sufficient places for visitors to sit?

Is there shade for outdoor seating?

Do you offer any multi-generation programming? Statistics show that these visitors are likely to return and could be enticed to bring their grandchildren with them.

Does your gift shop or book store include quality items suitable for gifts for grandchildren?



I live here and love being able to go any time to the Grand Canyon, Sedona, art fairs, Native American powwows and Tubac.

Survey respondent

Where They Come From:

The largest percentage of out-of-state cultural heritage visitors to Arizona come from California. That out-of-state demographic mirrors the overall Arizona experience for out-of-state, domestic, overnight visitors.

Northern Arizona attracts a strong cultural heritage market from Florida and most Northeastern markets except New York.

Maricopa County attracts visitors from New York, the Midwest, and Pacific Northwest.

Southern Arizona attracts visitors from the Midwest and Pacific Northwest markets and Canada.

Significantly, nearly one-third or 30% of the Arizona residents who responded to the survey were on trips that involved at least one overnight.

What this means for you:

If considering a regional advertising promotion or seeking press attention, focus your time and money on the Southern California market for the biggest return. This drive-market traditionally is the strongest market for Arizona.

Depending upon time and resources, create additional promotions for other target markets.

Remember: Arizona residents are a real and readily accessible market.

Questions to consider:

Can you partner with your Chamber of Commerce or Convention & Visitors Bureau to advertise in Southern California?

Can you partner with a local hotel or bed & breakfast and/or restaurant to create a more complete experience to entice local residents to visit your destination?

Are you contacting local tourism reporters in the newspapers in major cities to inform them about your new partnership?



Families enjoy the day at the Pueblo Grande Museum and Archaeological Park where they can explore ancient Hohokam homes along the Ruin Trail.



*Plenty of history
and plenty to do.*

Survey respondent



How They Plan, How Often They Visit And How Long They Stay

In-State Visitors Make Short-Term Plans.

They rely on newspaper articles for information about attractions and events.

Nearly one-third of in-state travelers made the decision to travel just one to six days in advance. Sixteen percent (16%) made their plans one to two weeks in advance.

More than 45% of in-state travelers made arrangements for their trips one to six days in advance, 14.2% made arrangements one to two weeks ahead, and 18.4% booked their trip three to four weeks in advance.

Out-of-state domestic overnight visitors tend to plan two months or more in advance.

More than one-fifth (21.4%) made the decision three to four months in advance. Of the others, 12.4% made plans three to four weeks in advance and 15.2% made plans five to eight weeks ahead of time.

More than 18% of out-of-state visitors made arrangements for their trip three to four weeks in advance, 17.7% made arrangements five to eight weeks ahead, and more than 11% made plans nine to twelve weeks ahead of time. Sixteen percent (16%) made arrangements three to four months in advance.

Out-of-state visitors stayed a median of 7 days.

“Snowbirds” stayed for extensive periods of time (60 days or more).

Arizona residents stayed a median of 2 nights away from their homes.

What this means for you:

In-state residents can respond to “last minute” deals and opportunities.

Out-of-state visitors need advance notice.

Out-of-state visitors look for multiple things to see since they may stay a week.

Both groups will probably return if they enjoy their visits and know there’s more to see.

Questions to consider:

Do you have a guest book for people to sign that asks for their comments and their email address so you can contact them again?

Are you contacting out-of-state visitors three-to-four months in advance of upcoming events and exhibits?

Do you use email to alert in-state visitors of special offers and events, sending alerts out one to two weeks in advance?

Do you communicate with visitors to encourage return visits? For out-of-state people living in cold climates, sending chatty notes (either email or snail mail) with reports of Arizona weather during the winter months can be reason enough for them to return!

Do you thank them for their visit? Letting visitors know you appreciate their business builds loyalty.

Is your web site up-to-date and does it include events and opportunities three-to-four months out?

Are you adding value for your visitors by including events and experiences in your community?

“

*We visited my family
and friends. Thanks
for the hospitality.*

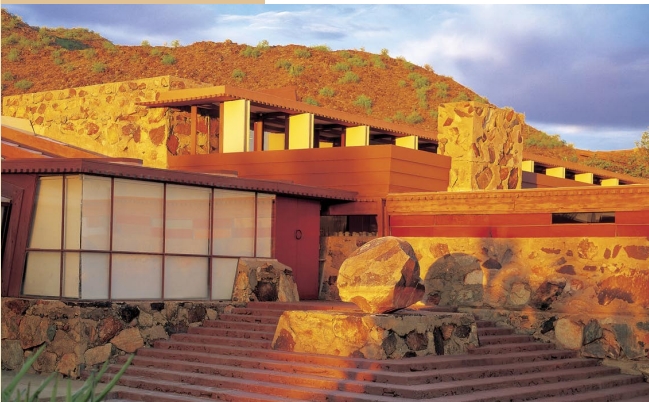
Survey respondent

”

Who They Travel With

They aren't solo travelers; they come with spouse or friend – or both.

Travel party	In-state %	Out-of-state %	Total %
Spouse/partner	61.9	68.8	65.6
Friends	26.2	16.8	21.1
Child(ren)	16.9	15.8	16.4
Other relatives	11.6	10.6	11.1
Alone	9.7	11.3	10.7
Parents	7.0	4.0	5.4
Grandchild(ren)	4.0	2.4	3.2
Other	1.7	1.5	1.6
Business Associates	0.6	1.2	0.9



Built as a winter camp for Frank Lloyd Wright, Taliesin West is one of Scottsdale's most important architectural treasures.

Photo courtesy of the Scottsdale Convention & Visitors Bureau

Where They Stay

Almost half of cultural heritage visitors stay in hotels or motels.

More than one-quarter (28%) stay in private homes with family or friends.

Just 11% reported that they stayed in a resort.

Taken together, more cultural heritage visitors stay in RVs and campgrounds than in resorts.

What this means for you:

Information must be placed where it is readily available to them.

You may need to think creatively to spread the word.

Questions to consider:

Do hotels, motels, restaurants, camp grounds and RV parks display your promotional material?

Have you met with concierges to inform them about your programs?

How recently have you invited front desk personnel to see and experience your destination or attraction?

Do you contribute to newsletters, such as RV clubs or camping organizations, to tell them about your destination, attraction or programs?

How They Get Here

Eighty-seven percent (87%) of in-state cultural heritage travelers use their own cars.

Forty-seven percent (47%) of out-of-state visitors come by plane.

Thirty-three percent (33%) of out-of-state visitors drive in own car.

Of those who fly in, 42% rent a vehicle.

What this means for you:

Good maps are essential.

Driving directions should be clear and include insider tips.

Maps should be downloadable on your web site.

Questions to consider:

Can you create cultural heritage destination “maps” that include other destinations/attractions in your area with good context-rich information?

Can you update staff at information centers at your local airport about your product?

Are there ½ and 1 day cultural heritage traveler itineraries available that promote your area?

Can you provide travelers with “car friendly” ideas, such as a list of parks and restaurants that are well suited for children?

Is it possible to have your organization included in geographic information systems that motorists use when driving?

Where They Get Their Info

Most Important Source of Information: Both groups rely on past experiences, family and friends but in-state residents rely mostly on newspaper articles (26%).

Sources	In-state %	Out-of-state %	Total %
Previous experience	35.3	33.0	34.0
Friends/relatives	21.0	34.8	28.4
Other	11.5	13.3	12.5
Newspaper article	15.0	0.3	7.1
Other web site	2.6	4.1	3.4
Travel club	2.0	2.7	2.4
<i>Arizona Highways</i> magazine	3.1	1.2	2.1
Travel guide/tour book	1.8	2.3	2.1
Convention & Visitors Bureau	2.4	1.4	1.8
Television	1.8	0.9	1.3
Another magazine	0.9	1.4	1.2
AOT information packet	0.8	1.5	1.2
AOT web site	1.0	1.4	1.2
Travel agent	0.3	1.2	0.8
Arizona History Traveler/ Arizona Heritage Traveler Web Site	0.1	0.6	0.4

“
I lived in Arizona
from 1980-2000
and tell everyone I
know that it is the
best state to visit
for ancient Native
American [experiences]
as well as present,
plus many wonderful
mining towns.

Survey respondent

”

What this means for you:

Get to know the locals. They are your biggest source of referrals.

Treat your guests well. You want to be in everyone's Christmas letter – e.g. “We had this wonderful experience and cannot wait to bring you there when you visit.”

Give your guests the best possible experience since visitors tell friends and family about their trips, whether good or bad. Positive reports can inspire return visits.

Questions to consider:

Do you plan special events for locals so they become your ambassadors?

Are there special programs just for them? For example, historical attractions could honor local attendees who are native Arizonans or 20-year residents.

Could you partner with like-minded organizations and attractions to create special family & friend events? For example: The Phoenix Museum of History has a “First Families” group to engage descendants of these families to participate in the museum.

Do you work with local enthusiast groups (e.g. railroad buffs, astronomers) when their interests support your mission?

Have you considered a “Wish You Were Here” campaign by providing a stamped post card from your destination/attraction that you give each visitor during peak season, encouraging them to write to a family member or friend and tell them about their visit to your destination.

Have you thought about a “Friends and Family Campaign” to thank frequent local visitors? Friends and family could be given “Company’s Here!” stickers that identify them as hosts when they bring in their friends or family visitors and make them eligible for a discount or free soft drink.

Do you honestly and frequently assess the experience you offer?

How often is your attraction/destination updated or refreshed?

Are you using the Arizona Heritage Traveler web site as a resource to promote yourself?

Do you encourage happy customers to post their comments on web sites such as Trip Advisor?

Have you thought about writing and posting blogs describing activities available in your area?

Is an events calendar posted on your web site that covers 6-12 months?

Do you market your gift shop and/or book store to the local residents as a great place to find/buy special items? Once they start patronizing your establishment, they’ll be more likely to bring guests for visits.

San Xavier del Bac Mission located nine miles south of Tucson was built by Franciscan Friars. The White Dove of the Desert, as it is called, is considered the finest example of Mission architecture in the U.S.



“

So much new development these days is plagued by generic. Jane Jacobs long ago noted our human quest for the authentic, the historic and the real.

Richard Florida,
author of *The Rise of the Creative Class*

”

Why They Visit

Of the 19 million out-of-state visitors to Arizona, 1.55 million are largely inspired to visit by cultural heritage motives.

Eighty and six tenths percent (80.6%) of out-of-state travelers had visited Arizona previously an average of 8 times. The median number of visits for out-of-state visitors was 5 previous visits.

“We had been there before and wanted to see it again.”

—From survey at Tubac Presidio State Historic Park

Tucson International Mariachi Conference is held every spring. It attracts visitors from all over the world who come to enjoy the music and the unique festival atmosphere.



Most Influential Reason to Visit: In-state travelers want the cultural heritage experience; out-of-state travelers are coming to see family & friends.

Activities	In-state %	Out-of-state %	Total
Visit family and friends	15.8	33.4	25.6
Cultural, arts, heritage activities	31.2	11.5	20.2
Attend an event/festival	14.3	5.6	9.5
Natural area activities	8.2	10.5	9.5
Driving to view scenery	8.2	8.4	8.3
Visit the Grand Canyon	1.8	10.5	6.6
Other	8.0	5.6	6.6
Business or convention	1.8	5.8	4.0
Shopping	4.2	0.0	1.9
Stay at a resort/spa	0.1	3.1	1.8
Watch sports events	1.2	1.6	1.4
Entertainment	1.4	1.1	1.2
Play golf	0.7	1.3	1.0
Sports activities	1.4	0.8	1.0
Adventure activities	1.1	0.5	0.8
Stay at a dude/guest ranch	0.1	0.1	0.1

“
The mariachis were our reason for coming. We don't have mariachis in East Moline, Illinois. The Mariachi Milagro Juronil came to our area [in] September 2001. They were from Tucson. Since I have a cousin living in Arizona for 39 years and never visited him, we decided to go hear the mariachis and also visit my cousin. We have now gone for four years.

From survey at International Mariachi Conference

”

“

[We return] to see what is new – the exhibits change frequently and we always learn something new about Arizona. This time it was the railroad.

From survey at Desert Caballeros Museum

”

What this means for you:

Visitors want to learn, but they don't want to be bored.

They want authentic, real and compelling experiences.

If the experience is positive, this group will come back!

They need reasons to keep returning – e.g. new exhibits, events, or a new interpretation of what you've been doing.

Questions to consider:

Are you using events and exhibitions to package (and repackage) what you have to offer? Have you enhanced the visitor experience with arts performances or dramatizations to bring stories to life?

Do you offer behind-the-scenes tours? (such as those that are offered at the Museum of Northern Arizona)

Do you give them enough reasons to return?

**Motives for the Trip in General:
Fun is the big motivator!**

Desert Caballeros Western Museum presents unique exhibits and art shows throughout the year that celebrate the beauty, history and spirit of the West.




In-State and Out-of-State Travelers Rank These Reasons as Important-to-Extremely Important

Reasons for visiting	In-state	Out-of-state
Have fun	94.8%	3%
See interesting sites	91.6%	91.6%
View scenery	81.3%	91%
Spend time with family & friends	81.5%	78.8%
Experience new & different places	81.1%	82.7%
Take it easy/rest/relax	76.7%	78%
Get away from everyday life	77.5%	77.7%
Experience nature	69.6%	79.7%
For the nice weather	65.6%	75.3%
Experience other cultures	77.9%	73%
Do many different things/activities	73%	74.3%
Learn about AZ history/culture	87.1%	71.8%
Be physically active	63.6%	66%
Be entertained	68.2%	54.4%

We never knew there were so many wonderful and educational places like this!

From survey at Casa Malpais



A cultural tourism itinerary has greatest appeal when it is creatively combined with related resources and activities, whether they be natural, recreational or retail.

Partners in Tourism:
Culture and Commerce

What They Like To Do

In addition to cultural heritage attractions, these visitors enjoy scenic drives, visits with friends and family, nature-based activities and shopping.

What this means for you:

These people enjoy the whole package of the state's assets. Your most successful marketing strategy is to package attractions and cross-market to provide a diverse experience. Since most of these visitors travel by car, the more information you give them on what to see and do, the longer they'll be tempted to stay or plan return visits.

Collateral materials should support this strategy with information about shopping and natural sites.

You will want to make it easy by including driving directions that describe the sites they'll see.

Questions to consider:

Can you form partnerships within your community (restaurants, other attractions) to make a more complete experience? For example, are you creating exciting itineraries that include some surprises, such as nightlife activities?



What They Did While In Arizona

They visited museums and historic sites, enjoyed local or ethnic food and shopped for arts/crafts. They also enjoyed driving to view scenery and natural areas. As expected, out-of-state visitors reported a greater variety of activities as part of their trip than did residents. While shopping was popular with both groups, golf was not.

Activity Participation: They experienced Arizona's history and culture.

Activities	In-state %	Out-of-state %	Total %
Cultural, arts, heritage activities	71.0	81.8	76.8
Driving to view scenery	40.1	74.1	58.6
Shopping	36.6	49.2	43.4
Visit family and friends	26.0	56.2	42.5
Natural area activities	25.8	56.0	42.2
Attend an event/festival	22.7	16.4	19.3
Visit the Grand Canyon	5.6	27.2	17.5
Entertainment	12.	18.4	15.6
Other	14.0	10.6	12.2
Stay at a resort/spa	3.3	19.0	11.8
Play golf	3.3	9.3	6.2
Watch sports events	2.3	7.2	4.9
Business or convention	2.2	7.0	4.8
Adventure activities	2.4	5.3	4.0
Sports activities	1.8	3.4	2.7
Stay at a dude/guest ranch	0.2	0.9	0.6

“We enjoyed this festival more than Santa Fe Indian Market. The schedule also allows us to attend the basket market at the Heard the preceding weekend.

From survey at Pueblo Grande Indian Market



Arizona has a
great mix of events
and activities for
all to enjoy.

Survey respondent

Both groups ranked visiting historic sites as the most important heritage activity during their trip, followed by visiting cultural sites and museums. Both in-state and out-of-state visitors agree that Arizona does not lack cultural heritage product.

Participation in Heritage Activities: Museums and historic sites are the biggest draws.

Activity	In-state %	Out-of-state %	Total %
Visited a museum	62.2	79.3	71.6
Visited a historic site	51.9	74.5	64.1
Ate local or ethnic food	39.0	55.7	47.8
Shopped for arts/crafts	37.3	54.5	46.3
Visited an archaeological site	19.2	38.7	29.8
Attended a culturally themed special event/festival	30.1	16.2	22.6
Visited a Native American reservation	11.3	29.6	21.3
Attended a culturally oriented concert	7.1	5.4	6.1
Went to a theater performance	2.8	7.3	4.9
Other	4.9	3.4	4.0

What this means for you:

Package. Package. Package.

Concentrate on what is authentic, real and meaningful to your mission.

Personalize and customize to bring experiences alive.

Provide positive, authentic opportunities for interaction so visitors can see, taste and take home some of their Arizona cultural heritage experience.

Partner and look for opportunities to work with museums and historic sites in your area.

Questions to consider:

Is the quality of your experience as good as it can be – from exhibits to your gift shop?


Do you provide opportunities for personal communication with artists/vendors?

Do you schedule demonstrations and or workshops?

Have you investigated using “smart cards” with encoded information for package discounts at multiple sites?

Do you mount exhibits that celebrate your heritage? The Desert Caballeros Museum is having success with its Cowgirl Up! art show that celebrates women western artists.

Do you collaborate creatively? Venues in the Phoenix area are part of the ShowUpNow Pass which is also available online. It offers visitors the ability to buy a package of museum admissions, including a one, two-or three-day pass with unlimited access to many of the area’s museums.



It reminded me of my childhood life on a farm. It was very interesting to be able to view all the things I had grown up with. Thank you!

From survey at Sharlot Hall Folk Art Fair



“
...Where the travel industry might speak of destination and their attractions, the humanities tend to speak of place and their power...places are best defined by their culture, by the stories born there and told there. A place is a destination with a story.

James Quay,
Executive Director,
California Council for
the Humanities

”

Do you make holidays special for your visitors so they will want to return? You might serve local cookies or muffins with tea and inform your local community in advance that you'll be doing this so it can get the word out for you and bring in guests! Celebrate Halloween, Valentines Day, plus all four seasons.

Can you identify a series of lectures or workshops especially for the heritage/cultural visitor?

Can you publicize special programming? If you are listed on the Heritage Traveler Web Site, could you send this as “news” item for the Home Page?

Can you create a new event from what you have at hand? Enhance your story by creating a mini-festival with the addition of food and/or art.

The Heard Museum, located in Phoenix, is one of the finest anthropological museums in the country. In addition to its fine permanent and traveling exhibits, the museum hosts festivals and competitions that bring in the world's finest Native artists and hoop dancers.



“

I'm coming back!

Survey respondent

”



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