

SURVEY OF VISITORS TO ARIZONA'S TRIBAL LANDS



Photo by: Joanne West

Arizona Office of Tourism



SURVEY OF VISITORS TO ARIZONA'S TRIBAL LANDS

Prepared for the
Arizona Office of Tourism

Conducted by:
Arizona Hospitality Research and Resource Center
School of Hotel & Restaurant Management
Northern Arizona University

PO Box 6024 • Flagstaff, AZ 86011-6024
Tourism.Research@nau.edu

NORTHERN
ARIZONA
UNIVERSITY



FOUNDED 1899

EXECUTIVE SUMMARY

A survey of visitors to Native American tribal lands in Arizona was commissioned by the Arizona Office of Tourism and conducted by NAU's Arizona Hospitality Research & Resource Center in 2004-2005. This research constituted the first major study of visitors to Native American tribes in Arizona and possibly in the Southwest. This final report, *Survey of Visitors to Arizona Tribal Lands*, provides first-ever baseline visitor data, presented in aggregate for the eight participating Arizona tribes. The study found that visitors to these Native American tribes in Arizona are slightly older, have higher annual incomes, stay longer, and have higher daily expenditures (for lodging, shopping and entertainment) than Arizona visitors generally. Visitors to Arizona's tribes are also more interested in cultural and historic activities, shopping for arts and crafts, educational experiences and sightseeing than are visitors overall. They are also highly satisfied with their visits to Native American tribal lands. Specifically, the survey found the following:

- Eight tribes, representing all the geographic regions of the state as well as both rural and urban areas, participated in this statewide survey, including: Colorado River Indian Tribes, Fort McDowell Yavapai Nation, Gila River Indian Community, Hopi Tribe, Navajo Nation Arts & Crafts Enterprise, San Carlos Apache Tribe, Tohono O'odham Nation, and the White Mountain Apache Tribe.
- A total of 1,854 surveys were collected over an 18-month period from visitors to these eight tribes.
- Visitors to tribal lands were most likely to travel with family members (56.0%) or with friends (33.4%).
- Average travel party size was three persons, while median party size consisted of two adults. (Average travel party size for Arizona visitors generally is two persons. Source for comparative data: D.K. Shifflet, 2004 Year-End Domestic Overnight Visitors.)
- Few children were included in these travel parties. Only 11 percent of parties contained any children under 18 years of age. Those parties with children averaged 3.2 children/party. Tribes may want to consider additional product development to attract the family market.
- More females (56.1%) than males (43.9%) were represented in the sample.
- Baby Boomers dominated visitors to tribal lands. Almost half the sample (44.6%) was between the ages of 46 and 65 years, with another 18.7 percent over age 66. The average age of visitors to tribal lands was 52 years – older than the Arizona average of 46 years. Tribes may, therefore, want to consider product development to attract younger visitor markets, such as GenX and Gen Y.
- Visitors to tribal lands were more highly educated than the general population; 24 percent were college graduates and another 28 percent had graduate study or graduate degrees.

- Average annual household income was \$102,000 – far above the average for the U.S. population generally. (Also, considerably above the \$72,700 average for Arizona domestic overnight visitors.)
- Arizona residents constituted the largest percentage (43.8%) of visitors to tribal lands. In fact, two-thirds of visitors hailed from five southwestern states – Arizona, California, Texas, New Mexico and Colorado. Tribes might, therefore, consider marketing strategies that reach beyond the region to a national market.
- In all, 96 percent of visitors to tribal lands originated in the United States, while 4 percent were international visitors. Canada (25%) and the United Kingdom (20.3%) accounted for almost half of all international visitors, followed by Germany, Italy and Australia. (International visitor origins closely matched those for Arizona visitors generally.) Greater efforts could be made to introduce Native American cultural attractions to a larger foreign visitor market.
- More than half of visitors (56.5%) were repeat visitors to tribal lands, while 43.5 percent were first-time visitors.
- The average visitor had visited the particular tribe where they were surveyed more than 10 times (10.3 times) in the past five years; the median number of visits was four times in five years.
- More than half of visitors (54.7%) indicated that the tribe was the main destination of their trip, while 45.3 percent said the visit to the tribe was one stop on a longer trip.
- Those who spent the night on tribal lands spent an average of 5.8 days and a median of 3.0 days. (Because means can be skewed by extreme values, the median may represent the more reliable number; it is closer to the 3.7 day average length of stay for Arizona domestic overnight visitors) Visitors who spent less than a day stayed an average of 3.9 hours (3.0 hours median).
- Many visitor overnights were spent in towns that border Indian communities. More than half of visitors (57%) indicated that they spent the night in border towns before visiting reservations.
- Almost all respondents (96%) used motor vehicles as transportation to reach tribal lands, dominated by automobiles (71.0%), Camper/RVs (18.6%), and rental cars (11.3%).
- By far, the most frequently used source of information about tribal lands was “friends and family,” relied on by 59.0 percent of visitors. Word-of-mouth referrals were particularly important information sources for tribal tourism, perhaps because fewer other sources existed. Much further down the list were: road signs (19.3%), guide books (9.8%), brochures (8.3%), and newspaper ads/articles (7.9%).
- While the Internet is generally a heavily used source of travel information, only 12.2 percent of visitors to tribal lands used either the Internet generally or a specific tribal website. This unusually low level of Internet use indicates tribes could benefit greatly from the development of informative websites, containing detailed visitor information, especially geared to the cultural visitor market.
- The dominant reason for visiting Arizona’s Native American tribes was for sightseeing or scenic beauty (44.8%). Other important reasons were: shopping

for Native American arts & crafts (23.8%), recreation (22.3%), cultural/historic activities (20.4%), educational experiences (16.8%), and casino gaming (12.4%). (These percentages are higher than for Arizona visitors generally who engage in sightseeing (33%), outdoor/recreation (12%), and cultural activities (18%) less frequently than visitors to Arizona's tribes.)

- While visiting tribal lands, visitors' activities were concentrated on: general sightseeing (52.8%), shopping (36.7%), looking at/buying arts and crafts (24.8%), visiting historic sites (22.3%), and casino gaming (20.4%). Visiting cultural centers/museums (18.8%) and eating traditional foods (18.0%) were also important activities.
- Visitors were highly satisfied with their visits to Arizona's Native American tribes. In terms of particular aspects of the experience, visitors were *most* satisfied with: friendliness of local merchants and service providers, availability of parking, and friendliness of tribal members. They were *least* satisfied with: availability of gasoline and service stations and availability and safety of scenic pullouts. Thus, tribes may want to devote more attention to infrastructure development (e.g., accommodation/foodservice) in addition to gas stations and scenic pullouts. This may also induce more overnights on tribal lands and fewer in border communities.
- The overall visitor satisfaction rating for visits to Arizona tribes was a very high 9.2 on a scale from 1 to 10 (where 10 is totally satisfied).
- The ranking of "value for money" at Arizona tribes was also high at 8.9 out of 10.
- Shopping is always an important tourist activity but was an unusually important part of visits to Arizona's tribal lands. Survey respondents reported an average of \$198 per-party/per-day spent on shopping. On tribal lands, much of this shopping is for jewelry (44.4%), the most common purchase, followed by other gifts (36.9%), souvenirs (34.8%), crafts (32.7%), books (16.2%), and clothing (15.2%).
- Asked whether they would recommend a visit to a Native American tribe to their friends and family, visitors were virtually unanimous in agreement – 98.0 percent said they would recommend a visit.
- An estimate of the total economic impact of visitors to Arizona's tribal lands produced direct spending of \$310.5 million, plus indirect and induced impacts of \$80.5 million, for a total economic impact of \$391 million. This level of tourism spending would support a total of 4,973 jobs on Arizona's tribal lands.