

SURVEY OF VISITORS TO ARIZONA'S TRIBAL LANDS

ANALYSIS OF VISITORS TO RURAL VS. METRO TRIBES



Photo by: Joanne West

Arizona Office of Tourism



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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

This report is a reexamination of visitor data first reported in the multi-year *Survey of Visitors to Arizona's Tribal Lands*, which was commissioned by the Arizona Office of Tourism and conducted in 2004-05 by the Arizona Hospitality Research and Resource Center at Northern Arizona University. This study, released in December 2005, analyzed visitor data collected for eight Arizona American Indian tribes and presented that data in aggregate for all tribes. This report, on the other hand, disaggregates that original database to take a more in-depth look at visitor patterns at Rural versus Metro tribes in Arizona.

Generally, this second study found that visitors to Rural and Metro tribes in Arizona are similar in many ways – parties of two persons; parties composed largely of family members; similar educational and income levels; private vehicles as travel mode; similar sightseeing and cultural/heritage activities; similar information sources; relatively high satisfaction levels; and, many similar shopping purchases. The survey also found some significant differences, however, including the following: Travel parties visiting Rural tribes contained more children, more Arizona residents, and had higher numbers of repeat visitors. Visitors to Rural tribes were also more likely to describe the tribe as their main destination; were more likely to engage in recreation and outdoor activities; stayed longer; and, consequently had higher spending. Visitors to Metro tribes were slightly older and visited the tribe as one stop on a longer trip. Visitors also reported slightly higher satisfaction levels at Metro tribes. Specifically, the report found the following comparisons of visitors to Rural and Metro tribes in Arizona:

- Of the eight tribes that participated in the original study, five were categorized for this analysis as Rural, including: Colorado River Indian Tribes, the Hopi Tribe, Navajo Arts & Crafts Enterprise, San Carlos Apache Tribe, and White Mountain Apache Tribe. Three were categorized as Metro tribes, including: Fort McDowell Yavapai Nation, Gila River Indian Community, and the Tohono O'odham Nation.
- The overall sample of 1,854 surveys was fairly evenly divided between the Rural tribes (1,057 surveys or 57% of the sample) and Metro tribes (797 or 43% of the sample).
- The majority of travel parties to both Rural (54%) and Metro (60%) tribes were composed of family members, followed by parties consisting of family and friends. Few visitors traveled alone or as part of an organized tour.
- Few differences appeared in terms of party size. Average party size for visitors to both Rural and Metro tribes were very similar at 3.5 and 3.3 persons respectively. Median party sizes for Rural and Metro tribes were the same at 2.0 persons each.
- A significant difference appeared between visitors to Rural and Metro tribes in terms of the number of children in parties. Only one-fourth (25.3%) of visitor parties at Metro tribes contained any children, while nearly half (48.1%) of visitor parties at Rural tribes contained children. Thus, while children were not the norm at either Rural or Metro tribes, they were more likely to be found at Rural tribes.

- Visitors to Metro tribes (57 years) were slightly older than visitors to Rural tribes (50 years). A slightly higher percentage of younger adults (ages 21 to 40) appeared in the Rural (15.6%) sample than in the Metro (10.6%) sample.
- Gender differences were also found between the samples. Male respondents (50.5%) dominated the Rural sample, while female respondents (64.9%) dominated the Metro sample.
- The educational levels of visitors to both Rural and Metro tribes were quite similar; few differences appeared on this measure between Metro and Rural tribes.
- The annual household incomes of visitors to Rural (\$70,480) and Metro (\$70,760) tribes were also quite similar.
- Significantly more visitors to Rural tribes were Arizona residents (51.7%) than was the case for Metro tribes (32.8%). Also, a greater percentage of visitors to Rural tribes (17.3%) were from California than for Metro tribes (8.0%). Otherwise, visitors represented a large number of states from which Arizona typically draws visitors.
- Foreign visitor percentages at both Rural and Metro tribes were generally very similar, although twice as many Canadians visited Metro tribes as Rural tribes. Overall, foreign visitors to tribes were dominated by Canada, the United Kingdom, Germany and the typical list of countries that visit Arizona generally.
- Rural Arizona tribes were significantly more likely to get repeat visitors than were Metro tribes – two-thirds of the Rural sample (66.6%) had repeat visits compared to only 42.1 percent of the Metro sample.
- Rural tribes also had about twice the number of repeat visits than did Metro tribes – Rural tribes had a mean of 12 and median of 5 previous visits, while Metro tribes had a mean of 8 and median of 2.5 previous visits.
- The length of visits to Rural tribes was longer than to Metro tribes. Rural visits averaged 6.1 days (3.0 days median) versus 4.1 days (2.0 days median) at Metro tribes. Visitors who stayed less than a day also stayed longer at Rural tribes – 5.3 hours mean/4.0 hours median at Rural tribes versus 3.2 hours mean/2.0 hours median at Metro tribes.
- Another difference was that almost three-fourths of visitors to Rural tribes (72.3%) said the tribe was their “main destination,” while only about one-third of visitors to Metro tribes (31.6%) said that tribe was their main destination. Two-thirds of Metro visitors (68.4%) said the tribal visit was one stop on a longer trip.
- More than half of the overall sample said they spent the night in a border town before visiting an Arizona tribe. The list of border towns for Metro visitors were most likely to be Tucson, Phoenix, and Casa Grande, while the list of most prominent Rural border towns included Gallup, Flagstaff, Blythe and Albuquerque.
- Private or rental vehicles dominated travel modes for visitors to both Rural and Metro tribes alike. More than three-fourths of visitors to both Rural (77.0%) and Metro tribes (78.3%) traveled to those tribes in private cars, followed by Camper/RVs and rental cars.
- The percent of visitors to Rural tribes that relied on recommendations from friends and family as their information source (71.7%) was much higher than for

- Metro tribes (41.8%). The difference for Metro tribes was the 36.6 percent of visitors who relied on Road Side Signs versus only 6.5 percent for Rural tribes.
- Few visitors to either Rural or Metro tribes used either the Internet generally or specific tribal websites as a source of tribal information – in sharp contrast to patterns for the U.S. travel industry generally – which indicates a dramatic need on the part of all tribes to improve their travel websites.
 - Trip purposes for both Rural and Metro tribes were very similar – mainly sightseeing and scenic beauty. Recreation, on the other hand, is largely the preserve of Rural tribes, while Shopping was a more important purpose for visiting Metro tribes. Cultural/historic/educational activities were very important trip motivators for visitors to both Rural and Metro tribes.
 - Visitor activities also included sightseeing as the most popular activity engaged in by visitors at both Rural (59%) and Metro (44%) tribes. The second-most popular activity at Rural tribes was shopping, while the second most-popular activity at Metro tribes was Looking at/buying arts and crafts.
 - Visitor satisfaction levels at both Rural and Metro tribes were high; both ranked the Friendliness of local merchants and service providers as well as Feelings of personal safety very highly. Rural visitors were least satisfied with availability of service/gas stations, while Metro visitors were least satisfied, interestingly enough, with the quality of casinos. None of the satisfaction levels, however, fell below a score of 3.0 or “satisfied.”
 - Overall, visitors rated their level of satisfaction with their visit to Rural tribes at 3.9 (on a scale from 1 to 5 where 5 is “totally satisfied”), and visitors to Metro tribes gave an overall satisfaction rating at a slightly higher 4.1.
 - In terms of visitor spending, the data showed that spending was higher in most categories (lodging, transportation, shopping, recreation, gaming and other) at Rural tribes over that for Metro tribes. This may have been a result of survey distribution patterns at the tribes, by which many surveys were distributed at special events or cultural attractions rather than at resort or casino properties.
 - The most popular items purchased at both Rural and Metro tribes were jewelry, gifts, souvenirs and crafts, although the order of importance was slightly different at the two types of tribes.
 - Visitors were overwhelmingly positive when asked if they would recommend a visit to these tribes to their friends and family. Fully 97.3 percent of visitors to Rural tribes and 98.9 percent of visitors to Metro tribes said they would recommend a visit.