

ARIZONA CULTURAL HERITAGE TOURISM STUDY EXECUTIVE SUMMARY & STUDY HIGHLIGHTS



ARIZONA CULTURAL HERITAGE TOURISM STUDY

CONDUCTED FOR THE
ARIZONA OFFICE OF TOURISM



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EXECUTIVE SUMMARY

The primary purpose of the cultural heritage tourism study was to generate information about cultural heritage tourists in Arizona. The project was a year in duration with on-site contacts beginning in October 2004 and ending in September 2005. The survey sites were selected and enlisted by Arizona Office of Tourism and Arizona Humanities Council staff in consultation with the ASU research team. A wide variety of types of sites and three events were enlisted to ensure representation of the variety of cultural heritage attractions in Arizona, diverse geographic locations, and sites with high enough visitation to gather an adequate number of questionnaires. During the year-long survey period, 1,980 out-of-state visitors were contacted with 1,069 returning their questionnaires for a response rate of 54 percent. The response rate for in-state visitors was 43 percent, with 883 returns out of 2,035 questionnaires. Total response rate was 49 percent, with a sample of 1,952.

Visitors in Arizona who go to cultural heritage attractions can generally be described as married couples with an average age of 56 and no children at home. They are usually traveling together and without children, and are often retired or working full time. They are fairly well educated with moderate to high household incomes. Event attendees tend to be more diverse than site attendees. Many of the out-of-state visitors originate from other Southwestern states, the Pacific Northwest, the Midwest, or the Northeast.

Those visiting from other states tend to plan their trips fairly far in advance of the visit. As is typically the case, travelers use a variety of information sources to plan their trips with previous experience and friends and relatives being especially useful. Visitors that live in Arizona also tend to use newspaper articles fairly extensively, as do event attendees, while those visiting from out-of-state use web sites and travel clubs such as AAA more often. There is limited interest in purchasing tickets for attractions in advance of the trip.

Most of the visitors who are on an overnight trip stay in a hotel or motel, or a private home. Arizona residents, as well as event attendees, most often travel in their own vehicle while those from other states frequently arrive by plane and then rent or borrow a vehicle. The most common activities to participate in are cultural, arts and heritage; viewing scenery; shopping; visiting friends and family; and visiting natural areas. Out-of-state visitors and site visitors (as opposed to event attendees) generally engage in a wider variety of activities than other visitors. True cultural heritage visitors tend to participate in culturally related activities to a greater extent than others.

The most common motives for the trip among visitors are have fun, see interesting sites, view scenery, and spend time with friends and family. About 58 percent of the respondents rated either *experience other cultures* or *learn about Arizona history and culture* as a very or extremely important reason for the trip. These are the individuals who can be considered true cultural heritage tourists. Event attendees tend to be more motivated by cultural experiences than site visitors, but site visitors tend to be more motivated by novelty than event attendees.

The specific attractions at which respondents were contacted were fairly influential on decisions to visit the community in which the attraction is located, with somewhat less impact on the trip in Arizona in general. Respondents feel the benefits of enjoying the visit, and increased appreciation and knowledge of the area's cultural heritage, are the most important with respect to visiting the attraction. They also feel like they are able to attain these benefits. The importance and attainment levels of true cultural heritage visitors are greater than for other visitors, probably due to their greater interest in cultural experiences.

Visitors are highly satisfied with their visits in general and to the specific attractions in particular. They also report high levels of satisfaction with the variety and quality of cultural, historic, and heritage attractions in Arizona. True cultural heritage visitors report higher levels of satisfaction than other visitors.

STUDY HIGHLIGHTS

A number of highlights can be drawn from the study that are particularly notable and/or point out the importance of cultural heritage tourism in Arizona.

- This study is one of the most comprehensive cultural heritage tourism studies conducted to date. The year-long sampling frame along with data collection at multiple geographically distributed heritage-oriented sites and events with differing themes is significant. The majority of cultural heritage tourism studies have been conducted at one site or event for a limited period of time.
- Of the visitors contacted, 91 percent of out-of-state visitors and 93 percent of in-state visitors had been to at least one other cultural heritage attraction in the six months preceding their receipt of the questionnaire. This points out that cultural heritage attractions are important to people, whether they are tourists or residents, and they visit such attractions on a regular basis.
- Both groups of visitors (in-state and out-of-state) are very satisfied with their cultural heritage experiences within the state as well as their visits in Arizona in general. They are satisfied with their visits to the attractions, as well as the diversity and quality of Arizona's cultural tourism product. Those that can be considered true cultural heritage visitors (those who rate either *experience other cultures* or *learn about Arizona history and culture* as a very or extremely important reason for the trip) are more satisfied than others, likely because of their greater level of interest and motivation with respect to these kinds of experiences.
- A large variety of states, Canadian provinces, and other countries were represented among study respondents. Clearly, cultural heritage attractions have broad appeal to people from diverse regions in North America and internationally.
- While tourists tended to use fairly typical information sources for trip planning, one rather interesting finding was that in-state visitors are quite reliant on newspapers, in particular newspaper articles, for information about attractions and events in the state. More than a quarter used a newspaper for information about the attraction. This was also true for those who attended one of the three events as these people used a newspaper for information much more frequently than site visitors. Newspapers should be considered in the marketing mix for promoting sites and events to in-state visitors.
- It is often assumed that in-state visitors are primarily on day-trips, thereby spending less money on a daily basis than out-of-state visitors. It is notable that 30 percent of Arizona residents who were respondents in this study were on trips that involved at least one overnight stay, thereby increasing their economic importance, particularly to the communities they visited.
- Most out-of-state visitors note participation in a number of activities while visiting Arizona. In addition to visiting cultural heritage attractions, these visitors frequently drive to see Arizona's scenery, visit with friends and family, engage in nature-based activities, and go shopping. It really is the whole package of the state's assets that appeal to tourists. Packaging of attractions and cross-marketing in order to provide tourists a diverse experience is likely to be the most successful marketing strategy. It should be noted, however, that attendees at finite special events, such as a festival, are less likely to engage in other activities as part of that trip, as opposed to visitors to

museums or other heritage sites, who are often on a longer trip and therefore more likely to engage in multiple activities.

- For most out-of-state visitors, the visit to the attraction at which they were asked to participate in the study was a first-time visit, though many were repeat visitors to Arizona. This suggests that visitors from other states are motivated by novelty and are looking for new and different places to go when they travel. In-state visitors, on the other hand, often had been to the attraction before and were also often fairly close to home. For residents, visiting an attraction is less for novelty and more for enhancing quality of life.
- Many visitors indicated that visiting the specific site or event where they were contacted was quite influential on their decision to both take the trip in general and to visit the community in which the attraction is located. About 39 percent of in-state visitors were heavily influenced to take the trip in general while 45 percent visited the specific community because of the attraction. A quarter of out-of-state visitors noted that the attraction was quite influential on their trip decision while over 41 percent went to the specific community due to the attraction. This suggests cultural heritage attractions are influencing the economy of communities by drawing visitors from both in and outside of Arizona.
- Fifty-eight percent of respondents reported that they were very or extremely motivated to visit Arizona by either learning about Arizona history and culture, and/or experiencing other cultures. Although not every study respondent can be considered a true cultural heritage tourist in that many were not motivated primarily by these kinds of experiences, this still encompasses a large percentage of the people surveyed and points to the importance of cultural heritage attractions as significant players in the Arizona experience. Residents were more strongly influenced by these motives than out-of-state visitors, primarily because visiting the attraction was often the major reason for the trip. It is clear that the availability of cultural heritage attractions is important for inspiring in-state travel.
- The importance of cultural heritage attractions as enhancers of quality of life for residents is also evident when the benefits being sought by residents are examined. Arizona residents report that feeling connected to the state's cultural heritage and a fulfilling lifestyle are important benefits. They also indicate that they are able to attain these benefits by visiting cultural heritage attractions.
- Out-of-state visitors want to have fun experiences along with increased appreciation and knowledge about the area's cultural heritage. They are also able to attain these benefits by visiting cultural heritage attractions.
- Most respondents (65%) visited cultural heritage attractions with their spouse/partner, while 21 percent visited with friends. Only 16 percent of travel parties included children. The average age of cultural heritage visitors is 56 years, and 45 percent are retired. Seeking ways to present cultural heritage information with broader generational appeal represents an opportunity.
- A large percentage, 88 percent, of respondents identified themselves as "Euro American/White", although some sites/events did have a broader ethnic attendance. Cultural heritage attractions may want to investigate ways to promote themselves to a more ethnically diverse audience.
- Of the 19 million out-of-state visitors to Arizona, 1.55 million (8%) are largely inspired to visit by cultural heritage motives. These visitors are estimated as spending

over \$2 billion in the state. In-state visitors spent another \$6 million or more. Clearly, cultural heritage visitors have a significant economic impact in the state.