

ARIZONA ORIGINS

*"ARIZONA'S INTEGRATION OF
GEOTOURISM PRINCIPLES"*

ARIZONA 
Origins

TODAY'S AGENDA

1. Workshop introduction/kickoff - **9 - 9:15**
2. What's Geotourism All About and How is Arizona Applying **9:15 - 10:30**
3. Break - **10:30 - 10:45**
4. Building Awareness - **10:45 – 12:15**
5. Lunch - **12:15 – 1:00**
6. Product Development Implications - **1:00 – 2:30**
7. Organization Integration - **2:30 -3:00**

WORKSHOP PRESENTORS

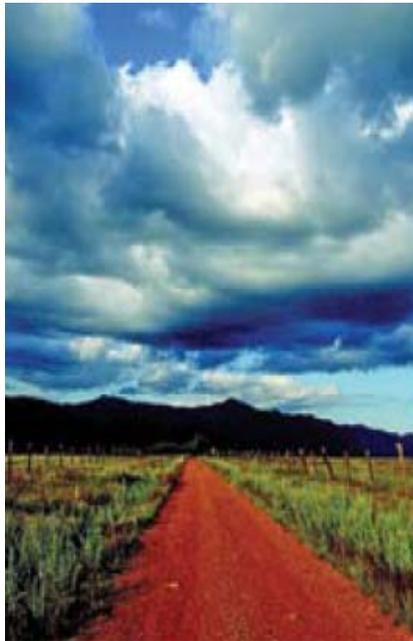
1. Mike Leyva – AOT
2. Laura French – AOT
3. Dr. Kathleen Andereck –
Arizona State University
4. Mitch Nichols – Nichols
Tourism Group



WORKSHOP ATTENDEES

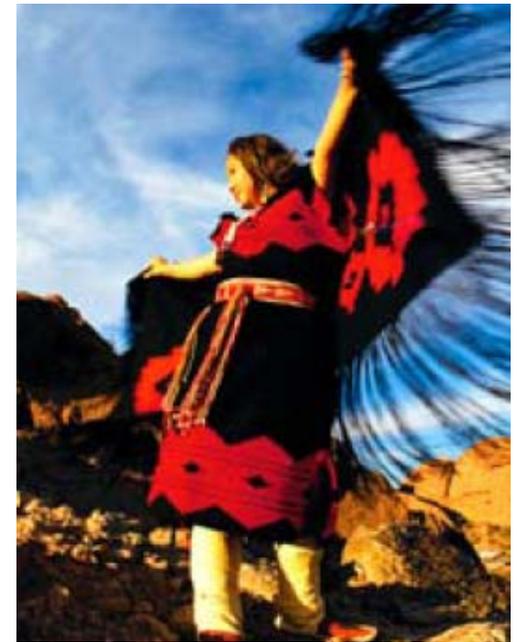
ATTENDEE INTRODUCTIONS





What's Geotourism All About and What are Implications for Arizona

ARIZONA 
Origins



ARE WE THINKING HOLISTICALLY

ECO-TOURIST

CUTURAL VISITOR

SUSTAINABILITY

HERITAGE
TRAVELER

ECO-TOURIST

COMMUNITY BASED
TOURISM

NATIONAL GEOGRAPHIC APPROACH

CENTER FOR
SUSTAINABLE
DESTINATIONS

Jonathan
Tourtellot

“ GEOTOURISM ”



GEOTOURISM DEFINITION



Geotourism: Tourism that sustains or enhances the geographical character of a place – its environment, culture, aesthetics, heritage, and the well-being of its residents.

Key Principles of Geotourism



GEOTOURSIM PRINCIPLES

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3. **It benefits residents economically. Travel businesses do their best to use the local workforce, services, and products and supplies. When the community understands the beneficial role of geotourism, it becomes an incentive for wise destination stewardship.**

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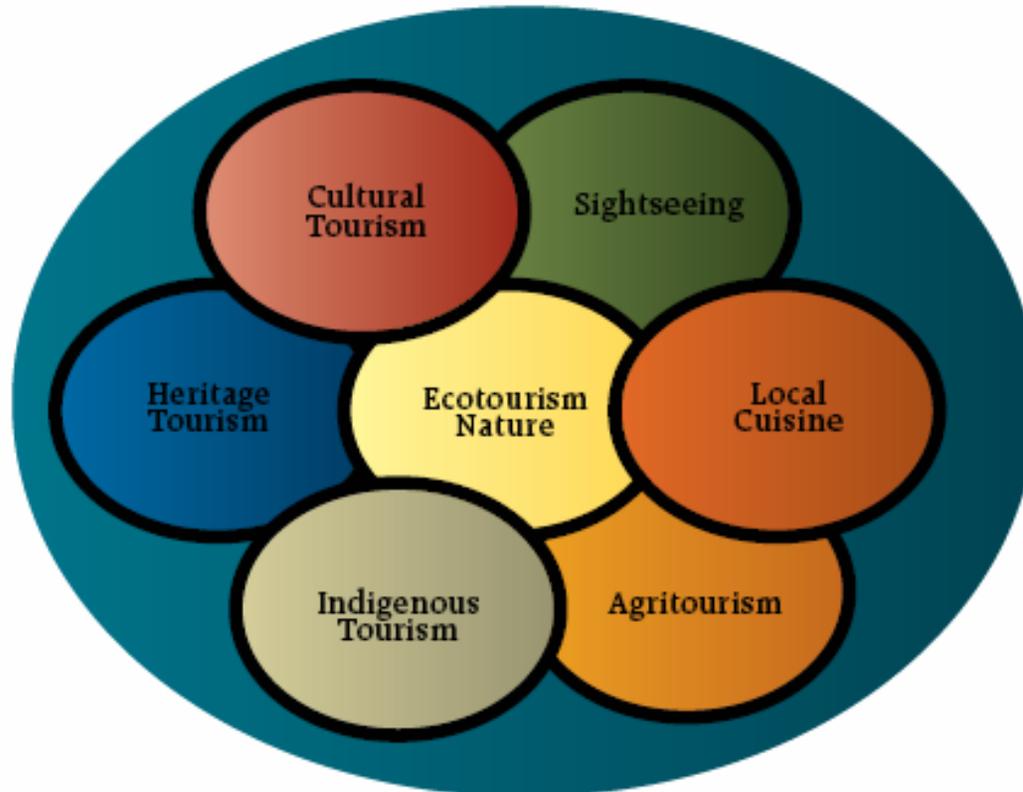
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- 5. It means great trips. Enthusiastic visitors bring new knowledge home, telling stories that send friends and relatives off to experience the same thing—a continuing business for the destination.**

GEOTOURISM'S INTEGRATED THINKING

Geotourism's Integrated Thinking



Source: National Geographic – Center for Sustainable Destinations

ARIZONA'S DIVERSITY

- Flora and Fauna
- History
- Archeology
- Geology
- Traditional Architecture
- Local Music
- Cuisine
- Local Crafts
- Dances
- Arts



KEY GEOTOURISM FACTORS

{ Sustain AND Enhance }

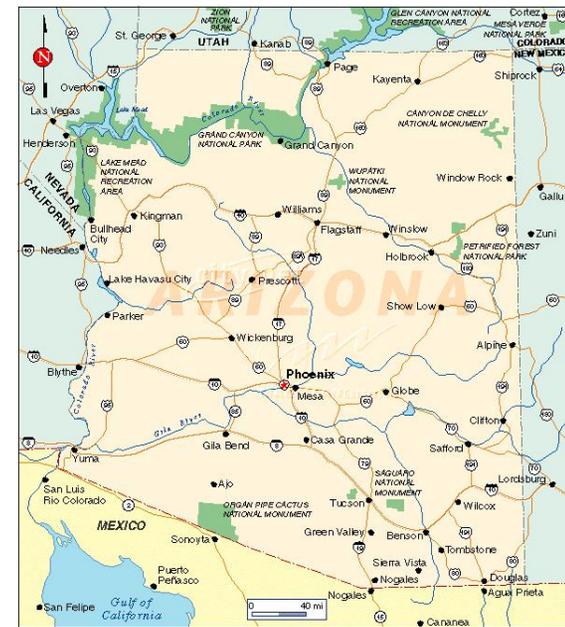
{ Restorative AND Constructive }

Why is Geotourism Important for Arizona?

1. Arizona is a Geotourism dependent state!
2. Many key Geotourism products face challenges!
3. Geotourism reinforces Arizona brand position!

Strong Competitive Environment

Arizona's Faces
Many Strong
Competitors –
State Relies
Heavily on
Geotourism
Assets



ARIZONA FACES STRONG MAN-MADE COMPETITORS

Man-Made Products Powerful Attractions

Magic Kingdom - 16.1 million

Disneyland - 14.5 million

Sea World - 4.1 million

Knott's Berry Farm - 3.5 million

ARIZONA TOP MAN-MADE ATTRACTIONS

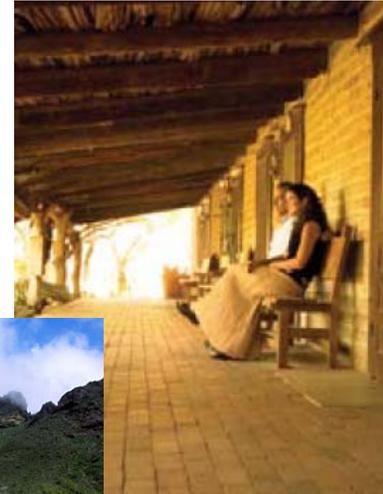
| ATTRACTION | 2005 ATTENDANCE |
|-------------------------------|--------------------|
| The Phoenix Zoo | 1,250,000 |
| Rawhide Western Town | 600,000 |
| Arizona -Sonora Desert Museum | 453,000 |
| Reid Park Zoo | 445,117 |
| Arizona Science Center | 400,000 |
| Wildlife World Zoo | 395,000 |
| Desert Botanical Gardens | 317,929 |
| Grand Canyon Railway | 222,277 |
| Heard Museum | 200,000 |
| Phoenix Art Museum | 170,833 |

ARIZONA IS GEOTOURISM DEPENDENT

| ATTRACTION | 2005 ATTENDANCE |
|--------------------------------|--------------------|
| Grand Canyon National Park | 4,470,232 |
| Saguaro National Park | 3,629,550 |
| South Mountain Park | 2,500,000 |
| Glen Canyon NRA | 1,928,274 |
| Lake Mead NRA | 1,426,915 |
| Canyon de Chelly | 900,000 |
| Montezuma Castle NM | 662,912 |
| Petrified Forest National Park | 598,498 |
| Coronado NF & Sabino Canyon RA | 594,278 |
| Lake Pleasant Regional Park | 500,754 |

PRODUCT DILEMMA

GEOTOURISM PRODUCT CHALLENGES



GEOTOURISM PRODUCT CHALLENGES

1. Attractions can act somewhat independent
2. These facilities frequently have missions that go beyond the visitor marketplace
3. They often lack marketing resources
4. Many attractions have limited sources of new capital
5. An overriding goal for many is long term sustainability – resulting capacity issues

Geotourism and Brand Integration

Clearly articulated
brand position
differentiates Arizona

**“Inspiring
Unforgettable
Southwest Moments.”**



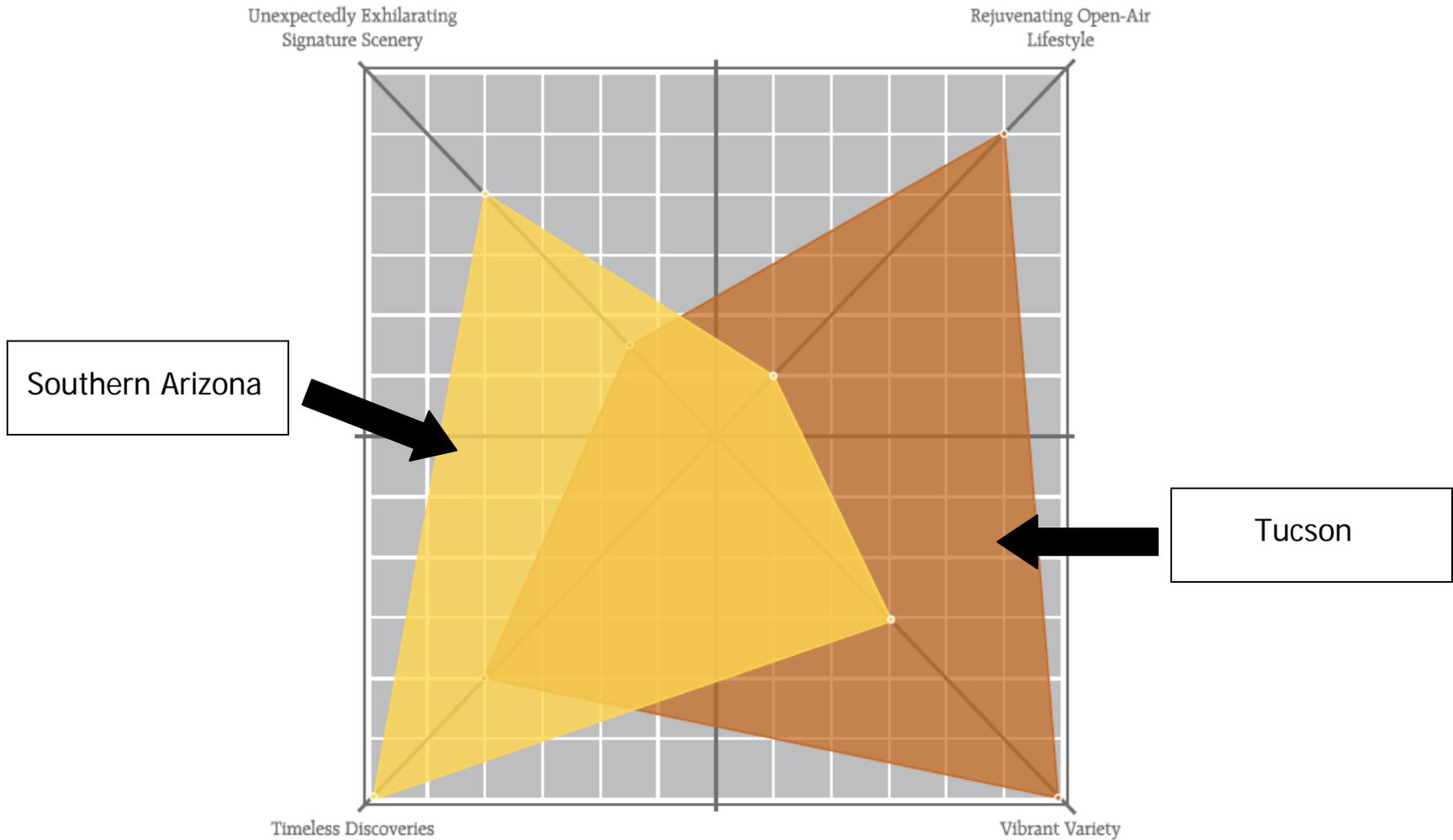
BUILDING ON ARIZONA'S BRAND

"Inspiring Unforgettable Southwest Moments."

Strategic Brand Dimensions

1. Unexpectedly Exhilarating Signature Scenery - *the beautiful scenery and vistas that set Arizona apart.*
2. Rejuvenating Open-Air Lifestyle – *the state's ability to present a blend of relaxed sophistication and recharge-your-batteries positive energy.*
3. Timeless Discoveries - *the state's rich range of authentic, unspoiled territory.*
4. Vibrant Variety – *a state with dramatic range, sweeping variety and inspiring abundance.*

REGIONAL PERCEPTUAL MAPPING



MAXIMIZING ARIZONA'S GEOTOURISM OPPORTUNITY

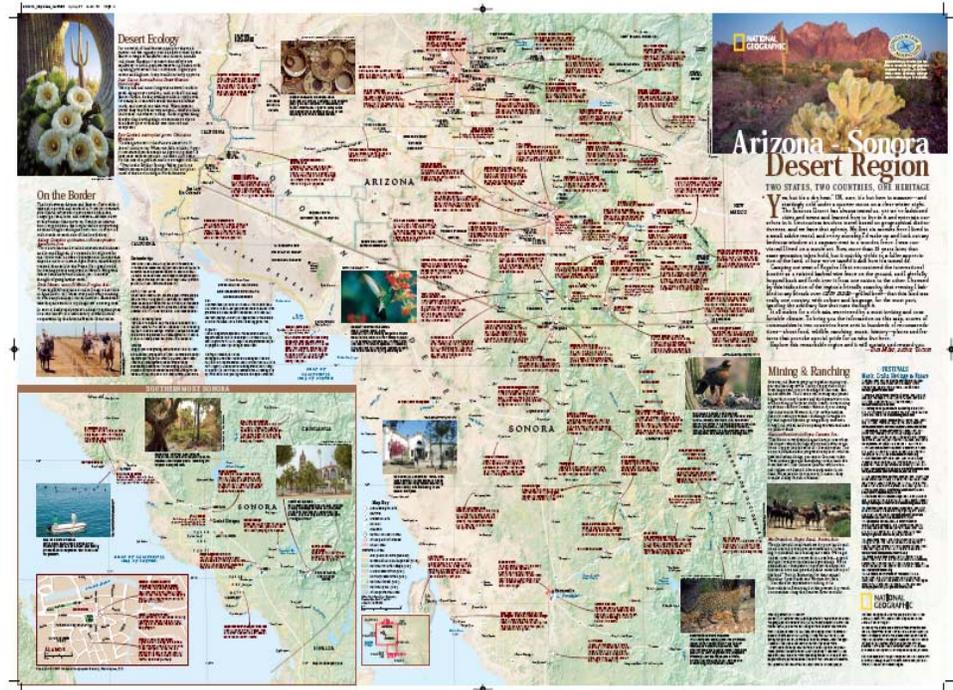
Geotourism dependent
Product challenges
Reinforces brand promise

**How does
Arizona Maximize it's
Geotourism Potential?**



ARIZONA-SONORA DESERT REGION GEOTOURISM MAPGUIDE

- First bi-national MapGuide
- Southern half of Arizona and Sonora, Mexico
- Links and integrates Geotourism assets
- Select mix of peers - Appalachia, Norway, Honduras, Romania, Vermont, Peru



ARIZONA ORIGINS – A NEW INITIATIVE



**A celebration of Arizona's unique
culture, natural environments,
history and heritage**

BRAND PROMISE

Applying Arizona's Brand Promise

"Inspiring
Unforgettable
Southwest Moments"



"Arizona Origins and
Arizona-Sonora
Geotourism
MapGuide"

Understanding Geotourists

Who are Geotourists?



How do we better understand their interests and desires?



STUDYING GEOTOURISM

TIA AND National Geographic 2003 Geotourism Survey

General attitudes about traveling; their travel preferences; their civic, environmental, and culturally-oriented practices in the local area; membership in various affinity groups; and their attitudes about tourism's impact on the local area.

TRAVELER INTEREST IN GEOTOURISM FACTORS

- Nearly three quarters of all travelers claim that it is important to them that their **visits not damage the environment**.
- Most travelers (73%) place a high importance on a **clean, unpolluted environment** when they take a leisure trip.
- **Authenticity is important** to travelers as 61% believe their experience is better when their destination preserves its natural, historic, and cultural sites.
- The majority of travelers are ready to act to preserve and protect our natural sites as 59% **support controlling access** to and/or more careful regulation of National Parks and public lands in order to help preserve and protect the environment.
- While 28% of respondents said they generally buy products and services from specific companies that make an effort to preserve and protect the environment, an even higher level (35%) are **inclined to select travel companies that strive to protect and preserve** the local environment of the destination.
- Fully 38% said they **would pay more** to use a travel company that strives to protect and preserve the environment. Most important, the majority (61%) of those who would pay more to use such companies would in fact pay five to ten percent more.
- While these practices are important to many, **only about half of all travelers are aware of at least one practice** employed by travel companies to preserve and protect the environment of destinations.

Segmenting Traveling Public

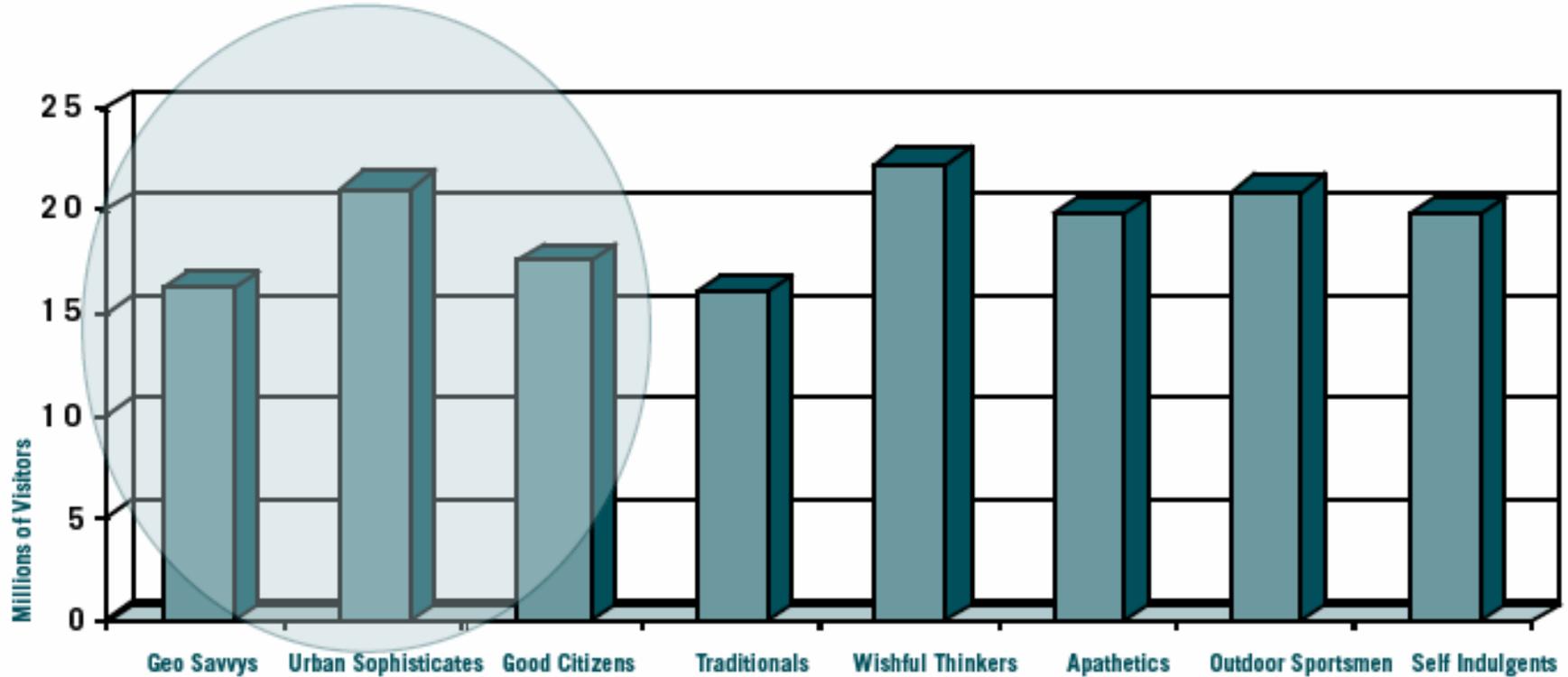
154 million Adult American Travelers

| | |
|---------------------|------|
| Geo Savvys | 16.3 |
| Urban Sophisticates | 21.2 |
| Good Citizens | 17.6 |
| Traditionals | 16.1 |
| Wishful Thinkers | 22.3 |
| Apathetics | 19.9 |
| Outdoor Sportsmen | 21.0 |
| Self-Indulgents | 19.9 |

Source: TIA - The Geotourism Study

HIGH POTENTIAL GEOTOURISTS

Geotourism Segmentation



1/3rd classified as
Geotourists!

GEO- SAVVYS – DEMOGRAPHICS

GEO-SAVVYS (16.3 MILLION TRAVELERS)

Demographically, Geo-savvys tend to be **highly educated and affluent**. In addition:

- Geo-savvys are **slightly more likely to be women** (54% or 8.8 million) than men (46%). **Over half of women in the segment are baby boomers** (53%); 47 percent of men are baby boomers.
- **One in four (28%) is a young adult under age 35.**
- Along with Urban Sophisticates and Good Citizens, they are **very well educated** with 60 percent having at least a college degree. **One in three (33%) has a graduate degree.**
- **One third of Geo-savvys (32%) hold professional/specialty positions**, similar to Urban Sophisticates and Good Citizens. While only eight percent are students, Geo-savvys are more likely than other clusters to still be in school.
- Over 6.1 million households, or one third (38%), **have annual household incomes over \$75,000**; 17 percent have household incomes above \$100,000.
- **Over one quarter of Geo-savvys (26%) live in the Pacific region.** They are more likely than almost all other segments to do so. Although only 10 percent live in the Mountain region, this is a factor that distinguishes Geo-savvys from all other clusters.
- **Half (51%) live in large cities or urban areas.** Like Urban Sophisticates, one in five (22%) lives in a slightly smaller city of 500,000 to 2 million in population.

Source : TIA – The Geotourism Study

GEO- SAVVYS

GEO-SAVVYS (16.3 MILLION TRAVELERS)

Geo-savvys are more likely than any other cluster group to do the following:

- 83% visit destinations with authentic historic and archeological sites
- 81% prefer small-scale accommodations run by local people
- 81% travel to experience people, lifestyles, and cultures very different from their own
- 80% visit small towns and rural areas
- 73% feel it is important to learn about their destination's people, history, and culture

Source : TIA – The Geotourism Study

URBAN SOPHISTICATES– DEMOGRAPHICS

URBAN SOPHISTICATES (21.2 MILLION TRAVELERS)

Named largely by where they tend to live, **travel quite frequently** and are indeed **sophisticated travelers**. In addition:

- Urban Sophisticates are **more likely to be women** (60% or 12.7 million) than men (40%). **Over half of these women are baby boomers** (53%); 29 percent are younger women under age 35. One third (33%) of men in the Urban Sophisticates segment are 55 years of age or older.
- Urban Sophisticates, along with Good Citizens and Geo Savvys, are very **well educated** with 63 percent having at least a college degree, and one third (34%) having a graduate degree.
- Given their higher education levels, it is not surprising that over one in five (23%) has an executive/managerial occupation and 32 percent has a professional/specialty position. In fact, Urban Sophisticates are **the most likely of all segments to hold executive or managerial positions**.
- One quarter of this segment (**24%**) **lives in the Pacific region**, and along with Geo-savvys, they are the most likely of the other segments to reside in this region. One in five (20%) Urban Sophisticates lives in the South Atlantic region.
- Of course, **over half (56%) of Urban Sophisticates live in large cities** or urban areas. Only one in five lives in only slightly smaller cities of 500,000 to 2 million in population.

Source : TIA – The Geotourism Study

URBAN SOPHISTICATES

URBAN SOPHISTICATES (21.2 MILLION TRAVELERS)

Urban Sophisticates are more likely than any other cluster group to do the following:

- 73% of Urban Sophisticates prefer trips to destinations offering authentic historic or archeological sites
- 86% take trips where they can spend time exploring historic and charming towns and locations
- 74% of Urban Sophisticates prefer destinations that offer a wide variety of cultural/arts events and attractions
- 63% of Urban Sophisticates also enjoy, however, visiting large cities, as well as high quality accommodations with excellent facilities and fine dining (67%), second only to Self-indulgents. They are second only to Geo-savvys in wanting to experience the outdoors, but with comfortable accommodations (74%).

Source : TIA – The Geotourism Study

GOOD CITIZENS – DEMOGRAPHICS

GOOD CITIZENS (17.6 MILLION TRAVELERS)

Demographic profile reflects an **older, but wiser set with an element of affluence.**

Additionally:

- Good Citizens are **more likely to be women** (54%) than men (46%).
- Over half (56%) of men in this segment are age **55 or over**. Nearly half of women are age 55 or over (46%).
- Along with Urban Sophisticates and Geo Savvys, Good Citizens are well educated with **63 percent having at least a college degree**, and 37 percent with a graduate degree.
- Fifteen percent have executive/managerial occupations and 33 percent have professional or specialty occupations, also **similar to Urban Sophisticates and Geo-savvys**. The Good Citizens cluster is **more likely to include homemakers** (16%).
- Given their education and occupations, it is not surprising that Good Citizens average annual household income (\$70,300) is **among the highest of all segments**. Four in ten Good Citizens (41%) have annual household incomes above \$75,000.
- Sixteen percent live in South Atlantic states; **17 percent live in the Pacific region**.
- **Half (50%) live in large cities or urban areas**; in fact Good Citizens are more likely to do so than many of the other cluster groups. Nearly one in five lives in a rural area (18%).

Source : TIA – The Geotourism Study

URBAN SOPHISTICATES

GOOD CITIZENS (17.6 MILLION TRAVELERS)

What distinguishes Good Citizens from other groups is their strong involvement in a number of community activities, as well as their heightened level of cultural and environmental awareness and sensitivity. Additionally:

- 88% want **high levels of cleanliness**
- 60% want high quality **visitor services and personnel**
- Good Citizens are more likely than any other group to **participate in civic organizations** (55%); to **volunteer** for (54%) or **make donations** to (55%) historic, cultural and educational organizations; to **volunteer for nature-related organizations** (29%);
- Similarly, this group is also most likely to buy from companies that donate to charities (52%) and from companies that make an **effort to preserve and protect the environment** (47%).

Source : TIA – The Geotourism Study

FULL REPORT

<http://www.tia.org/researchpubs/index.html>

Geotourism:

The New Trend In Travel

Prepared by
The Research Department of the
Travel Industry Association of America



Sponsored by
National Geographic Traveler

NATIONAL GEOGRAPHIC
TRAVELER

\$225
ISSN: 1543-4559

THE POWER OF GEOTOURISM

“Opportunity if Apply Effectively?”

“Geotourism is an emerging trend that will endure. Sustaining the local environment or bringing in a bit of the local color can mean the difference between a discounted rate or a higher rate, can develop increased seasonal traffic, and spur local tourism.”

*Dawn Drew
Vice President and Editor
National Geographic Society*

ARIZONA AND GEOTOURISM SUMMARY

- Geotourism embraces holistic thinking
 - Arizona is Geotourism dependent
 - Geotourism products face challenges
- Geotourism builds on Arizona's "Brand Promise"
 - Research supports Geotourism interest



How does Arizona Build Awareness?

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