

# Missouri Cultural & Heritage Tourism Study

## *Executive Summary*

Online Survey Conducted May 2005

*June 2005*  
120632



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# Introduction and Purposes of the Research

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TNS is pleased to present this Cultural/Heritage Tourism Report to the Missouri Division of Tourism (MDT). This project was conducted among leisure travelers in two Missouri marketing areas (in-state/out-of-state) to help MDT understand the relevance, importance, and awareness of Missouri as a cultural/historical destination to visitors and potential visitors. These areas studied are:

- v What the cultural/heritage traveler knows about Missouri's cultural/heritage products
- v How frequently they visit Missouri for cultural/heritage activities
- v How frequently they participate in these activities anywhere
- v What is the economic impact of these visitors

One third of respondents (31% in-state; 35% out-of-state) claim no travel or participation in a cultural/heritage activity in the past two years. TNS defines a "cultural/heritage" tourist as one who participates in at least one of the following activities or visited at least one of the following attractions while on vacation:

- v Civil War battlefields
- v Civil War historic sites (other than battlefields)
- v General historic sites (other than Civil War sites)
- v Museums
- v Exhibitions/art exhibits
- v Wineries
- v Music concerts/festivals
- v Live theater/music shows
- v Food festivals
- v Culinary experience/special restaurants
- v Heritage/ethnic festivals
- v Crafts shows/festivals
- v Lewis and Clark events
- v Other cultural/heritage sites/activities

The marketing area includes separate analysis of in-state and out-of-state (DMAs of surrounding states) residents. Specifically, the study measures:

- v Participation in and reasons for cultural tourism
- v Preference for, and awareness of, Missouri and competitive states as cultural/heritage destinations

- v State association with famous/infamous Missourians
- v Frequency of leisure travel in past 24 months
- v Trips to Missouri in past 12 months
- v Likelihood of traveling to visit cultural/heritage attractions and activities
- v Likelihood to visit Missouri for cultural/heritage attractions and activities
- v Appropriateness of selected Missouri descriptors
- v Number and timing of visits to Missouri in past three years
- v Planning: information sources, including Missouri State Tourism Office information
- v Trip-o-graphics: travel companions, planning horizon, length of stay, transportation mode, accommodation choices, and spending levels on recent Missouri trips
- v Demographics

**All respondents in this report have visited a cultural/heritage site or participated in a cultural/heritage activity in the past two years. Therefore, any discussion of total Missouri or total out-of-state residents encompasses those who have a predisposition towards cultural/heritage travel.**

This report proceeds with a description of the research method, followed by an Executive Summary/Implications section. A copy of the full report may be obtained by contacting the Missouri Division of Tourism: Mary Oberreither at (573) 751-1908 or [mary.oberreither@ded.mo.gov](mailto:mary.oberreither@ded.mo.gov).

# Research Method

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The research method utilized a web-based survey conducted among households in Missouri's marketing area. Conducted between May 18 and May 24, 2005, the sample was selected from the TNS NFO Interactive Panel. Potential respondents were sent an e-mail "pre-alert" that requested their participation in this research study and provided the Internet location of the survey.

To qualify, respondents must have taken at least one leisure trip in the past 24 months that required an overnight stay and/or consisted of traveling fifty miles or further from home, a principal travel planner in the household, and 18 years of age or older.

In addition, they must have participated in one of the following cultural activities in the past two years:

Civil War battlefields

Civil War historic sites (other than battlefields)

General historic sites (other than Civil War sites)

Museums

Exhibitions/art exhibits

Wineries

Music concerts/festivals

Live theatre/music shows

Food festivals

Culinary experience/special restaurants

Heritage/ethnic festivals

Crafts shows/festivals

Lewis and Clark events

Other cultural heritage sites/ activities

The study was divided into two sample groups, in-state and out-of-state:

Figure 1  
Qualified Respondents – by Market

	E-mailed Invitations	Responded	Base: Responded		Qualified Returns*	Base: Invitations
			No Travel	No Cultural/ Heritage		Response Rate
<b>In-State</b>	<b>2,857</b>	<b>1,272</b>	<b>8%</b>	<b>23%</b>	<b>664</b>	<b>23%</b>
<b>Out-of-State</b>	<b>7,142</b>	<b>3,155</b>	<b>9%</b>	<b>26%</b>	<b>1,686</b>	<b>24%</b>
<b>TOTAL</b>	<b>9,999</b>	<b>4,427</b>	<b>8%</b>	<b>25%</b>	<b>2,350</b>	<b>24%</b>

\*Excludes Incompletes, over quotas, panel maintenance

The out-of-state residents live in the following DMAs (Designated Marketing Areas) of surrounding competitive states (IL, IA, NE, KS, OK, AR, KT, TN, TX, WI, and MN):

- Champaign-Springfield-Decatur (IL)
- Des Moines-Ames (IA)
- Omaha (NE)
- Peoria-Bloomington (IL)
- Topeka (KS)
- Tulsa (OK)
- Wichita (KS)
- Cedar Rapids-Waterloo-Debuque (IA)
- Chicago (IL)
- Evansville (IL)
- Ft. Smith-Fayetteville-Springdale-Rogers (AR)
- Lincoln-Hastings-Kearney (NE)
- Louisville (KT)
- Memphis (TN)
- Oklahoma City (OK)
- Paducah-Cape Girardeau-Harrisburg-Mt. Vernon (IL, MO, KT)
- Quad Cities: Davenport-Rock Island-Moline (IA, IL)
- Dallas-Ft. Worth (TX)
- Jonesboro (AR)
- Little Rock-Pine Bluff (AR)

Milwaukee (WI)  
Minneapolis-St. Paul (MN)  
Nashville (TN)  
Rochester-Jefferson City-Austin (MN)  
Rockford (IL)  
Sioux City (IA)

Missouri residents live in the following DMAs (Designated Marketing Areas):

Columbia-Jefferson City  
Joplin-Pittsburg  
Kansas City  
Ottumwa-Kirksville  
Quincy-Hannibal  
Springfield  
St. Joseph  
St. Louis

Comparisons in the report focus on these key segments for both in-state and out-of-state residents:

- ▼ Total
- ▼ Cultural visitors (visited a cultural/heritage site/event in Missouri in past 12 months), often referred to as 'Cultural Interest' in the report text.
- ▼ Culturally motivated (culturally motivated and visited Missouri in the past 12 months)

TNS supervised all fieldwork, editing, coding, and tabulating of the results.

# Executive Summary

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The survey assesses the impact of cultural/heritage travelers on Missouri's tourism industry from two separate marketing areas: in-state visitors and nearby state DMAs. The varied opinions, interest, and awareness of Missouri between the two markets underscore the importance of reviewing them separately.

**All respondents in this report have visited a cultural/heritage site or participated in a cultural/heritage activity in the past two years. Therefore, any discussion of total Missouri or total out-of-state residents encompasses those who have a predisposition towards cultural/heritage travel.**

The report highlights these key comparisons for both in-state and out-of-state residents:

- ✓ Total
- ✓ Cultural visitors (visited a cultural/heritage site/event in Missouri in past 12 months), often referred to as 'Cultural Interest' in the report text.
- ✓ Culturally motivated (culturally motivated and visited Missouri in the past 12 months).

## The Appeal of Missouri

The survey provides clear direction on key cultural/heritage tourism:

- ✓ **Appeal is Appeal is Appeal.** With few exceptions, attractions and activities that appeal to in-state residents appeal to out-of-state residents as well. Based on the past two years, these features draw the greatest number of visitors: general historic sites (non-Civil War), heritage/ethnic festivals, non-battlefield Civil War sites, and music concerts/festivals.
- ✓ **Travelers “Do” What They “Say.”** Although several factors (traveling companions, costs, impulsiveness, available time) can create gaps between desire and behavior, the gaps are small. Travelers participate in the activities/attractions that they claim motivate them to travel; no feature reveals a gap larger than 10% between “do” and “say.”
- ✓ **Missourians Very “Plugged In” to Missouri Features.** At least four out of five (79%+) Missouri residents believe that they can find each of the 13 cultural/heritage attractions in Missouri, except Civil War Battlefields (66%) and non-Battlefield sites (66%). With no exceptions, Missouri leads all other states on every feature.

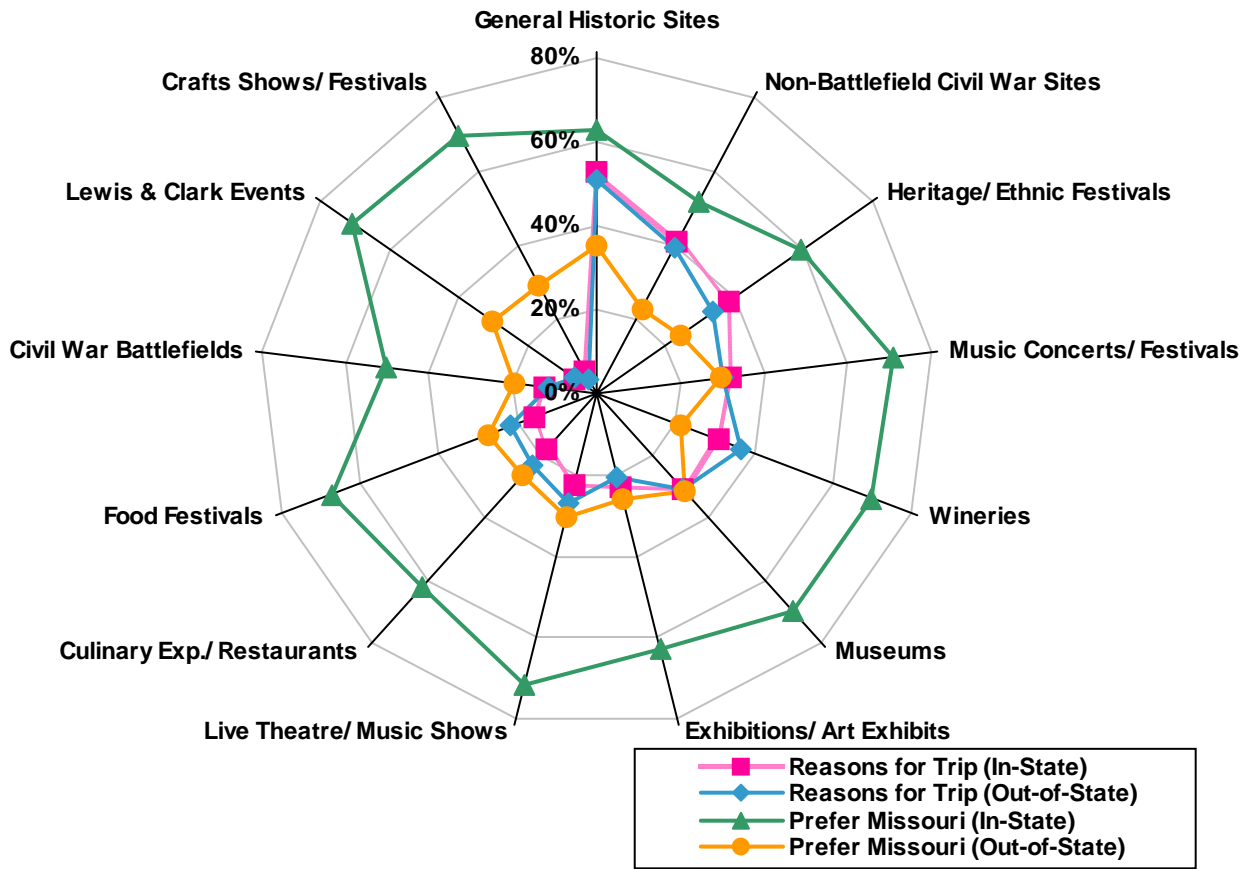
- v **Non-Missourians Less Aware of Missouri Features.** Missouri's lead in awareness disappears among out-of-state residents:

  - Missouri leads all other states on only two items: *wineries* (but still only 37%) and *Lewis and Clark Events* 58%).
  - Missouri approaches the top states on (Missouri %; top state %): *general history/Non-Civil War sites* (72%; 78% Texas), *music concerts/festivals* (72%; 76% Tennessee), *museums* (79%; 85% Illinois), *live theatre/music shows* (73%; 76% Illinois), and *crafts shows/festivals* (72%; 73% Illinois).
  
- v **Missourians Recognize Other Missourians; Non-Residents Do Not.** Over half of in-state residents associate Missouri with: Mark Twain (88%), Harry Truman (83%), Jessie James (76%), and Scott Joplin (53%). The only personality that "out-of-staters" clearly associate with Missouri is Mark Twain (65%). At least Missouri is the dominant state (44%) for Harry Truman, although he receives fewer than half the "votes."
  
- v **Missourians Want to Travel in Missouri.** Of six states from which to choose for cultural/heritage travel, Missourians overwhelmingly choose Missouri (75% total, 86% culturally motivated), more than double the next closest states (Tennessee: 34% total, 35% culturally motivated; Illinois: 33% total, 33% culturally motivated).
  
- v **Even Non-Missourians Show Interest in Missouri.** Among total out-of-state residents, Missouri (34%) places among the leaders (Texas 37%, Tennessee 36%, Illinois 33%). However, culturally motivated travelers (who have been to Missouri) position it at the top (Missouri 61%), Tennessee ranks second at a distant 49%.
  
- v **Consistent Reasons Cited When Missouri Is Not Preferred.** "*Been there/done that*" ranks at the top for not choosing Missouri as the preferred state for both in-state and out-of-state residents. Missouri must also fight images, both internal and external, that other states *have superior attractions and are more beautiful and scenic*. Non-residents add that *there is not much to do in Missouri*.

The following chart visually summarizes several other key results:

- v **Market Desires Are Consistent.** Attractions and activities that appeal as reasons to visit for in-state residents apply to out-of-state residents as well. The rank of the features is similar between the two segments, with two exceptions: out-of-state residents place greater emphasis on *wineries* while more in-state residents cite *exhibitions/art exhibits*. A few features may gather stronger interest among one group, such as *heritage/ethnic festivals* among in-state residents, but not by enough to markedly alter the ranking.
- v **Missourians not Only Recognize, but Prefer, Missouri's Attributes.** Unusually strong for this type of research, Missourians believe that they can find every cultural/heritage feature within their state. No negative gaps exist: the desire to visit a feature is never stronger than Missouri's ability to fulfill that desire (at least among the nearby competitive states).
- v **Preferences Indicate Chauvinism (Devotion to Missouri) and/or Familiarity.** Missourians prefer to visit Missouri for every cultural/heritage reason. It substantially leads every state, including the closest competitors of Illinois and Texas, as well as Kentucky, Tennessee, and Oklahoma.
- v **Out-of-State Recognition Lags.** Residents of other states seldom prefer Missouri as a state to visit for any of the specific cultural/heritage features shown. State by state comparisons (shown in the detailed results) place Missouri:
  - As the leader among competitors on only one item: *Lewis and Clark events*. However, *Lewis and Clark events* fail to draw more cultural visitors than general out-of-state visitors.
  - Trailing Illinois, Missouri ties Texas for second on *wineries* and *live theatre/ music shows*. Note, however, that the category "none of these states" actually "wins" the *winery* image.
  - Missouri ranks third among six nearby states on: *general history (non-Civil War)*, *Civil War Sites (battlefield or not)*, *museums*, *exhibitions/art exhibits*, *culinary experience/restaurants*, *food festivals*, and *crafts shows/festivals*.

Figure 2  
Image Ratings: Reason for Trips (Q1b) and Missouri's Scores (Q3c)



Note: The attractions are listed “around the clock” in importance. The closer to the outer rim, the higher the score.

## Effects of Cultural Interest/Motivation

Interest in cultural/heritage events/attractions/sites strengthens awareness and interest in Missouri – among both in-state and out-of-state travelers. They:

- ▼ **Are More Likely to Seek Cultural/Heritage Events/Sites.** Cultural visitors, especially if culturally motivated, are significantly (statistically) more likely to travel specifically to attend cultural events or visit cultural/heritage sites than non-culturally oriented visitors:
  - Almost a third (31%) of **Missouri residents** claim that they are *extremely/very likely* to travel for cultural/heritage sites/events – the proportion rises among past year cultural visitors (36%) and culturally motivated visitors (39%).
  - **Out-of-state residents** express even greater interest in cultural/heritage sites/events (34% total, 47% cultural visitor, 55% culturally motivated).
- ▼ **Are More Likely to Seek Cultural/Heritage Events/Sites IN MISSOURI.** Cultural visitors are not only more likely to travel for these reasons, but to do so in Missouri:
  - Nearly half (46%) of Missouri residents claim that they are *extremely/very likely* to visit Missouri for cultural/heritage reasons – the number rises significantly for past year cultural visitors (59%) and culturally motivated visitors (63%).
  - Out-of-state residents probably direct their primary interest towards their own state, since only one in six (16%) expects (*extremely/very likely*) to visit Missouri for cultural/ heritage sites/events soon. However, interest in Missouri jumps for those who express cultural interest (34% cultural visitor, 43% culturally motivated).
- ▼ **Cultural Visitors Are More Attuned to Cultural/Heritage Features.** Specifically:
  - By definition, cultural visitors stop for cultural/heritage attractions. In-state, 12 of the 13 cultural/heritage features draw a larger proportion of cultural visitors than total visitors, half by at least five percentage points. *Lewis and Clark events* provide an exception where the proportions of cultural visitors and total visitors essentially match. Out-of-state, the gap widens. Eleven of the 13 features appeal more strongly to cultural visitors, half by at least ten percentage-points.
  - The pattern repeats when visitors report the reasons for cultural/heritage trips, except that the gap between cultural and total visitors narrows.
  - As noted earlier, the culturally motivated are more likely to **prefer Missouri** to any of the other six states. The gap is not so large among in-state residents because most already prefer Missouri, whether culturally interested/motivated or not. However, Missouri moves from “just one of the crowd” among total out-of-state residents to a leader among culturally interested/motivated travelers.

- The 13 cultural/heritage features, when compared among the six states, yields the same pattern of results. In-state culturally motivated travelers are somewhat more aware and more likely to prefer Missouri for each feature. Out-of-state culturally motivated travelers are more aware than total non-residents by a few percentage points (averaging 6 points), but are much more likely to **prefer** Missouri (averaging 16 points higher).
- Cultural motivation barely impacts awareness of specific Missouri attractions (Nelson Atkins Museum, St. Louis Art Museum, etc.). However, and as expected, in-state visitors are much more aware than those out-of-state (the gap varies by attraction but averages about double – 53% vs. 28%).

## Demographics and Travel Patterns

The in-state and out-of-state markets look, demographically, very much alike (age, income, and education). However, a number of important differences exist, including:

- v Out-of-state residents average a greater **number of trips** in the past two years than Missourians (8.6 vs. 7.9). However, Missouri residents are six times as likely to travel in the state (4.8 vs. 0.8 Missouri trips) during a 12-month period.
- v Regardless of residence, culturally interested (6.3 in-state; 2.6 out-of-state) and culturally motivated (6.9; 2.9) travelers **visit Missouri** significantly more often (annually) than total residents (4.8; 0.8, noted above).
- v As expected, culturally interested (3.1) and culturally motivated (3.7) visitors take more **Missouri trips that include cultural activities** than total residents (2.3) in-state. The same pattern, albeit with lower numbers, occurs out-of-state (1.6 culturally interested; 1.8 motivated; 0.9 total residents).
- v In-state visitors, with easier access (distance), average more **visits to each attraction** than out-of-state visitors (note: accumulated attraction visits exceed the total number of trips since travelers typically pursue multiple activities per vacation). The two markets (in-state vs. out-of-state) also make similar (but not identical) choices. Not surprisingly, culturally motivated travelers visit each cultural/heritage event/attraction more frequently than non-culturally motivated travelers.

## Trip-O-Graphics

Travel details (spending, travel party, accommodations and number of nights, gender, and age) of the most recent Missouri trip vary somewhat between in-state and out-of-state visitors, but tend to be similar within the two major subgroups:

- ▼ **In-State Visitors Spend \$400 Per Trip.** Falling within a narrow range, non-cultural visitors spend the least (\$392) while cultural visitors spend the most (\$426).
- ▼ **Out-of-State Visitors Spend \$600 Per Trip.** Out-of-state visitors spend more (partly because they stay longer) and the range is wider: \$581 for non-culturally motivated visitors to \$725 for culturally motivated (a difference of \$144).
- ▼ **People Travel in Pairs.** Half of visitors travel with one other person, regardless of group or residence.
- ▼ **Age Groups Vary by Residence.** Out-of-state visitors are more likely to be 55+ (30% vs. 25% in-state); otherwise, the proportions in each age group vary little.
- ▼ **Missouri is a Drive-To Destination.** Nearly all Missourians and residents of nearby markets drive their own autos (93% in-state visitors; 87% out-of-state).
- ▼ **Out-of-State Visitors Stay Longer.** In-state visitors average 2.8 nights, out-of-state visitors add almost an extra day to their trips (3.5 nights). Cultural interest and motivation adds a little time for in-state visitors (2.6 nights for non-cultural visitors to 2.9 nights for cultural visitors), but not for out-of-state visitors.

## Planning Resources/Behaviors

Regardless of residence, travelers consult similar information sources:

- ▼ **Exception: In-State Visitors Rely on Familiarity.** In-state residents more often trust their own knowledge (50% vs. 40% out-of-state).
- ▼ **The Internet Tops Other Sources.** Half of visitors (48% in-state; 47% out-of-state) check the Internet for Missouri travel information, pushing reliance on friends/relatives (41% in-state; 39% out-of-state) out of the traditional top spot. Internet usage has steadily gained since the mid-1990s, other TNS research indicates that it is beginning to level.
- ▼ **Cultural/Heritage Travelers Use State Tourism Bureaus.** Based on their most recent Missouri trip that included cultural/historical activities, twice as many out-of-state culturally motivated visitors gather information from State Tourism Offices as non-culturally motivated visitors (20% vs. 10%), exceeding *newspapers/magazines, advertising, auto clubs, chambers of commerce, travel agents, and tour operators*. In-state visitors follow the same pattern, but with lower proportions (14% culturally motivated visitors consult State Tourism Bureaus vs. 6% non-culturally motivated).
- ▼ **They Specifically Recall Using Missouri's State Tourism Office.** Nearly a third (29%) of out-of-state culturally motivated Missouri visitors recall contacting the Missouri State Tourism Office. Again, they rely on it more heavily than in-state culturally motivated visitors (19%).
- ▼ **Missouri's Tourism Information Adds to Tourism Revenue.** Materials convince almost one in four (23%) in-state and out-of-state visitors (who recall receiving them) to travel to Missouri; in addition, many others (19% in-state and 15% out-of-state) stay longer and/or visit more attractions because of the information.
- ▼ **Information Boosts Satisfaction.** A large boost is the added convenience for the traveler. Half (54%) of in-state and many (41%) out-of-state requesters believe that tourism materials help them plan their trips and find destinations most suited to their tastes.
- ▼ **In-State Visitors Have Shorter Time Horizons.** Half (50%) of in-state visitors plan a trip within two weeks of travel vs. a third (35%) of out-of-state visitors. Typical of general leisure travel, most trips occur during the summer (June, July, and August).

# Implications/Recommendations

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Culturally interested and culturally motivated visitors make good candidates for destination marketers. As noted in the summary and detailed results, their greater awareness and participation in nearly all cultural/heritage attractions and events demonstrate that they pay attention to them. They act more studiously in researching and gathering information. If compared to total travelers outside the parameters of this study (no cultural/heritage trips in more than two years), the results would likely be even more striking. Results suggest that:

- ▼ **State Tourism Information Is Effective.** As just illustrated, culturally motivated visitors use Missouri State Tourism Office resources effectively. The materials persuade many to visit, stay longer, visit particular attractions, and help them find activities and events that fit their tastes. The long-term benefits build repeat visitors who promote the state through word-of-mouth, still one of the dominant sources of information for travelers.
- ▼ **Advertising to Culturally Interested/Motivated should be Effective.** Information gatherers that they are, culturally interested/motivated travelers can be enticed by new and interesting relevant advertising. Advertising can whet their appetite for travel overall, but especially for cultural/heritage travel.
- ▼ **They Come to Missouri.** Although culturally motivated visitors do not spend markedly more time or money PER TRIP, they visit. And visit frequently. Annually, both resident (6.9 vs. 4.8) and non-resident (2.9 vs. 0.8) culturally motivated travelers take two extra trips in/to Missouri compared to total visitors.
- ▼ **They Economically Benefit Missouri.** The extra two trips amounts to an annual additional \$800 from residents (two extra trips x \$400) and \$1,450 from non-residents (\$725 x 2) above other travelers, not counting the \$144 differential between culturally motivated and non-culturally motivated visitors for the trips that all non-residents take.
- ▼ **Getting First-Time Visitors is Worth the Effort.** In-state residents visit Missouri anyway, but out-of-state residents rank Missouri much higher if they are culturally interested/ motivated. Once they experience the many features provided by Missouri, they can be hooked. The state is full of history, museums, and entertainment for the culturally-minded traveler. Once they experience Missouri, they come back.
- ▼ **Advertising Targets.** Those “not preferring” Missouri often cite *been there/done that, not much to do in Missouri*, and a belief that other states may have *superior attractions and/or more beauty/scenery*. Advertising that stresses new, different, and exciting features of the state against a backdrop of beautiful scenery can help overcome many objections.

- ▼ **Visitors Currently Uninspired by Midwest Wineries.** Not just Missouri, but none of the six competitive states gets much respect for their wineries – “none of the above” won the category as a place preferred for this attribute. It suggests that a broad opportunity exists to build awareness, especially among out-of-state residents who claim greater interest in wineries. Missouri already leads competitive states among non-Missourians on this dimension (37%).