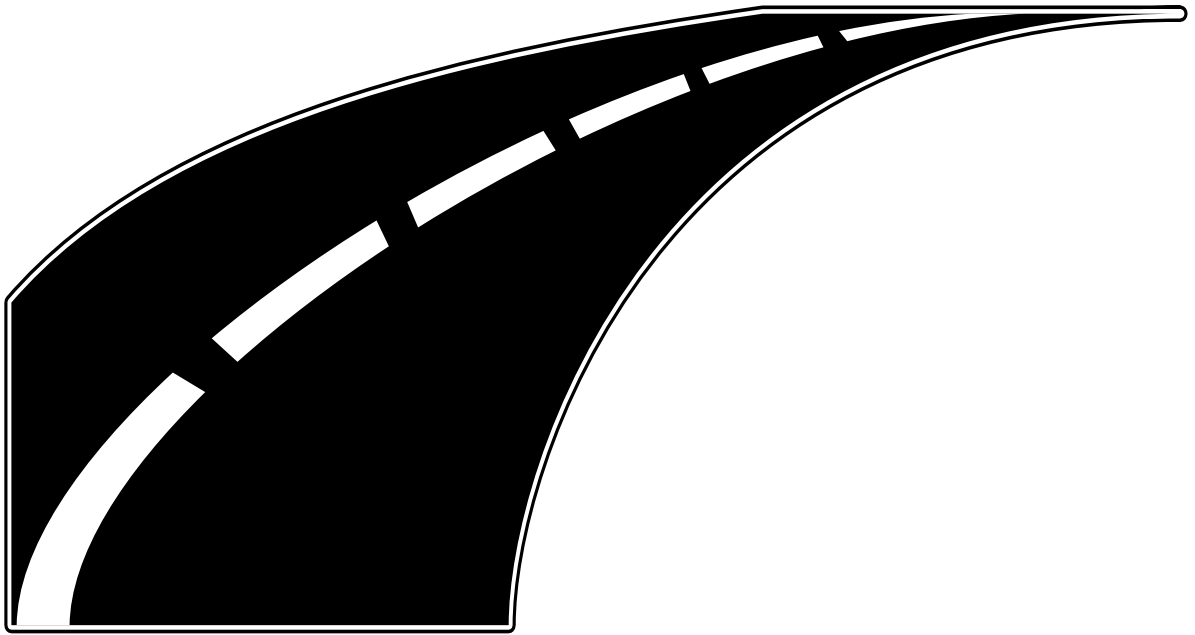


***TRAVEL AND TOURISM
IN THE GLOBE-MIAMI REGION 1995-96***



***by Julie Leones, Douglas Dunn and Valerie Ralph
Arizona Cooperative Extension***

March, 1997

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Table of Contents

I. Executive Summary	1
II. Introduction	3
III. Visitor Numbers and Expenditures	7
IV. Economic and Fiscal Impacts	11
V. Overnight Visitor Profile	13
VI. Day Trip Visitors	17
VII. Roosevelt/Tonto Visitors	21
VIII. Visitors' Evaluations and Travel Information Preferences	25
IX. Profiles of Specific Types of Visitors	29
X. Summary and Conclusions	33
Appendix A. Survey Methodology	39
Appendix B. Globe-Miami Region Survey	41
Appendix C. Summary Tables	43
Appendix D. Globe-Miami Maps	47

Table of Contents (cont.)

List of Tables

Table 1. Number of Visitors to the Globe-Miami Region	7
Table 2. Total Visitor Expenditures in the Globe-Miami Region by Season	8
Table 3. Percent of Visitor Parties Making Specific Retail and Other Expenditures	8
Table 4. Average Expenditures in the Globe-Miami Region by Visitor Type	9
Table 5. Average Expenditures in the Globe-Miami Region by Season	9
Table 6. Percent of Visitors in Globe-Miami at Different Times During the Day	9
Table 7. Trip Characteristics of Globe-Miami Region Visitors	10
Table 8. Economic Impacts of Visitor Spending in the Globe-Miami Region	11
Table 9. Fiscal Impacts of Visitor Spending in the Globe-Miami Region	12
Table 10. Origin of Overnight Visitor Parties	13
Table 11. Destinations of Overnight Visitor Parties	13
Table 12. Primary Reason for Overnight Visitors to be in Globe-Miami Region	14
Table 13. Activities of Overnight Visitor Parties	14
Table 14. Attractions Visited by Overnight Visitor Parties	14
Table 15. Relationship of Overnight Party Members to Survey Respondent	15
Table 16. Interests of Overnight Visitors	15
Table 17. Modes of Transportation of Overnight Visitor Parties on this Trip	15
Table 18. Percent of Overnight Parties with U.S. and Foreign Citizen Members	15
Table 19. Race and Ethnicity of Overnight Visitors	16
Table 20. Origin of Day Trip Visitor Parties	17
Table 21. Destinations of Day Trip Visitor Parties	17
Table 22. Primary Reason for Day Trip Visitor Parties Trip to the Globe-Miami Region	17
Table 23. Activities of Day Trip Visitor Parties in the Globe-Miami Region	17
Table 24. Attractions Visited by Day Trip Visitor Parties on this Trip	18
Table 25. Relationship of Day Trip Party Members to Survey Respondent	18
Table 26. Interests of Day Trip Visitor Parties	19
Table 27. Modes of Transportation of Day Trip Visitor Parties During this Trip	19
Table 28. Citizenship of Day Trip Visitor Parties	19
Table 29. Race and Ethnicity of Day Trip Visitors	19
Table 30. Origin of Roosevelt/Tonto Visitor Parties	21
Table 31. Destination of Roosevelt/Tonto Visitor Parties	21
Table 32. Primary Reason for Visiting Roosevelt/Tonto Area	21
Table 33. Activities of Roosevelt/Tonto Visitor Parties	21
Table 34. Attractions Visited by Roosevelt/Tonto Visitor Parties During this Trip	22
Table 35. Relationship of Roosevelt/Tonto Visitor Party Members to Survey Respondent	22
Table 36. Interests of Roosevelt/Tonto Visitors	23
Table 37. Modes of Transportation Used by Roosevelt/Tonto Visitor Parties on this Trip	23
Table 38. Citizenship of Roosevelt/Tonto Visitors	23
Table 39. Race and Ethnicity of Roosevelt/Tonto Visitors	23
Table 40. What Visitors Like About the Globe-Miami Region	25
Table 41. Suggestions Made by Visitors for Improving the Globe-Miami Region	25

Table of Contents (cont.)

Table 42. Percent of Visitor Parties that Could Not Find What They Wanted	25
Table 43. Ratings of Accommodations in the Globe-Miami Region.....	26
Table 44. Ratings of Restaurants in the Globe-Miami Region	26
Table 45. Ratings of Shops in the Globe-Miami Region	26
Table 46. Ratings of Attractions in the Globe-Miami Region	27
Table 47. How Visitors First Learned About the Globe-Miami Region	27
Table 48. Types of Travel Information Used on this Trip	27
Table 49. How Visitors Prefer to Receive Travel Information	28
Table 50. General Characteristics of Specific Visitor Groups	29
Table 51. Major Activities of Specific Visitor Groups	30
Table 52. Local Attractions Visited During Stay	31
Table 53. Interests of Specific Groups of Visitors	32
Table C1. Origin of Visitor Parties	43
Table C2. Destination of Globe-Miami Region Visitor Parties	43
Table C3. Primary Reason for Visit to Area.....	43
Table C4. Activities on thisTrip	44
Table C5. Attractions Visited on this Trip	44
Table C6. Age Distribution of Visitors	45
Table C7. Interests of Visitor Parties	45
Table C8. Modes of Transportation of Visitor Parties During this Trip	46
Table C9. Household Income Distribution of Visitor Parties	46

List of Figures

Figure 1. Map of the Globe-Miami Region and Area Attractions	5
Figure 2. Total Expenditures by Type of Visitor.....	7
Figure 3. Expenditure in the Globe-Miami Region by Category	8
Figure 4. Age Distribution of Overnight Visitors	15
Figure 5. Household Income Distribution of Overnight Visitor Parties	16
Figure 6. Age Distribution of Day Trip Visitors	18
Figure 7. Household Income Distribution of Day Trip Visitor Parties	19
Figure 8. Age Distribution of Roosevelt/Tonto Visitors	22
Figure 9. Household Income Distribution of Roosevelt/Tonto Visitor Parties	23



TRAVEL AND TOURISM IN THE GLOBE-MIAMI REGION 1995-96

I. Executive Summary

How many visitors came to the Globe-Miami Region between October 1995 and September 1996?

260,000 visitors came to the region

What was the economic impact of these visitors?

\$13.6 million in expenditures in the Globe-Miami region

\$21.2 million in sales revenue impacts in the Globe-Miami region

634 jobs directly and indirectly resulted from visitor spending

\$1.4 million total tax revenues at the state, county and city level

- \$ 732,000 for the State of Arizona

- \$ 323,000 for Gila County

- \$ 349,000 for the Cities of Globe and Miami

Where did these visitors come from?

45 percent were from other parts of Arizona

20 percent from other Western states

14 percent from Central states

8 percent from Southern states

7 percent from Eastern states

6 percent from other countries

Why were visitors in the area?

Visitors had many different reasons for being in the region. The following were some of the primary reasons given:

16 percent passing through the area

15 percent to visit Roosevelt Lake

14 percent to visit Tonto National Monument

11 percent to visit family and friends

7 percent to visit historical sites or museums

What percent of visitors stopped to see major local attractions?

59 percent saw Roosevelt Lake

44 percent saw Tonto National Monument

35 percent saw historic downtown Globe-Miami

28 percent saw Besh-Ba-Gowah

17 percent saw Boyce Thompson Arboretum

8 percent saw Cobre Valley Center for the Arts

What were visitors main leisure activities while in the region?

- 75 percent were doing general sight-seeing
- 54 percent visited historic areas
- 33 percent took photographs
- 28 percent visited museums
- 22 percent went shopping

What was the age distribution of visitors to the Globe-Miami region?

- 7 percent were under 18 years of age (versus 26 percent of U.S. population)
- 13 percent were 18 to 35 years of age (versus 27 percent of U.S. population)
- 43 percent were 36 to 59 years of age (versus 30 percent of U.S. population)
- 37 percent were 60 years of age or older (versus 17 percent of U.S. population)

What were the major conclusions of this study?

This study was a benchmark for the Globe-Miami region as it begins a serious expansion in travel and tourism. Over 175 new hotel rooms have been added and the Apache Gold Casino and Resort has opened since the study was completed.

Overnight visitors should be the focus of tourism promotion and development efforts in the region in order to increase average expenditures per visitor.

Arizona markets are especially good markets to target; promotion in these markets should emphasize the advantages of overnight stays.

II. Introduction

The Globe-Miami Region Travel and Tourism Study was conducted as part of the ACERT Rural Tourism Development Program and Arizona Cooperative Extension's Communities in Economic Transition (CET) Program. The objectives of the study were to learn more about visitation to the communities of Globe and Miami and to surrounding areas and to learn more about rural tourism in general. The study benefitted from tremendous cooperation and assistance from the Globe-Miami Chamber of Commerce, assistance from local businesses and from several local survey coordinators who stayed in close contact with the businesses and distributed some of the surveys themselves. The study was funded with state and federal CET funds and the survey design and analysis were conducted at the University of Arizona.

The survey methodology and the survey instrument are provided in Appendices A and B for the interested reader. The results are based on a survey of visitors, not a census and hence, there is some sampling error associated with the numbers presented. This sampling error increases when the data is broken into subgroups. Generally, most results presented for the entire sample are within +/- 5 percent of the real figure.

The biggest challenge in this study has been estimating total number of visitors, since a large percentage of visitors to Globe do not spend the night in the community. The estimates presented here are based on visitor count information from a variety of sources and information from the survey concerning how many local attractions were visited. A more detailed description of the procedure used is provided in Appendix A. A total of 923 completed visitor questionnaires are the basis for this report.

This study of Globe-Miami Region visitors is an important benchmark because towards the end of the study period, the region began to experience increases in visitation. The region is rich in historical, cultural and natural resources. The community of Globe-Miami offers interesting shopping and dining opportunities. Globe-Miami has also become a regional trade center for many small communities in the area. The Apache Jii Day Festival and the Historic Home Tour are notable events in the Globe-Miami. The addition of three new hotels and a casino resort will boost the number of modern hotel rooms available by more than 175 rooms, while the charming bed and breakfasts, restored vintage motor lodges and developing ranch recreation activities in

the region will continue to delight visitors by providing unique historic and cultural experiences.

Some of the results presented in this report are broken out by three distinct seasons:

shoulder season - September, October, November and December.

peak season - January, February, March, April, May

low season - June, July, August

Seasonal results are only reported when there are a sufficient number of observations per season and when there are significant seasonal differences in the data. The period covered is October, 1995 through September, 1996. All data analysis was conducted with data sets broken out for these three seasons.

Results are also broken out by specific types of visitor. The three main classes of visitors examined are:

Overnight visitors- people who spent one or more nights in Globe-Miami.

Day trip visitors- people who were only in Globe-Miami for the day and received a survey in the Globe-Miami region.

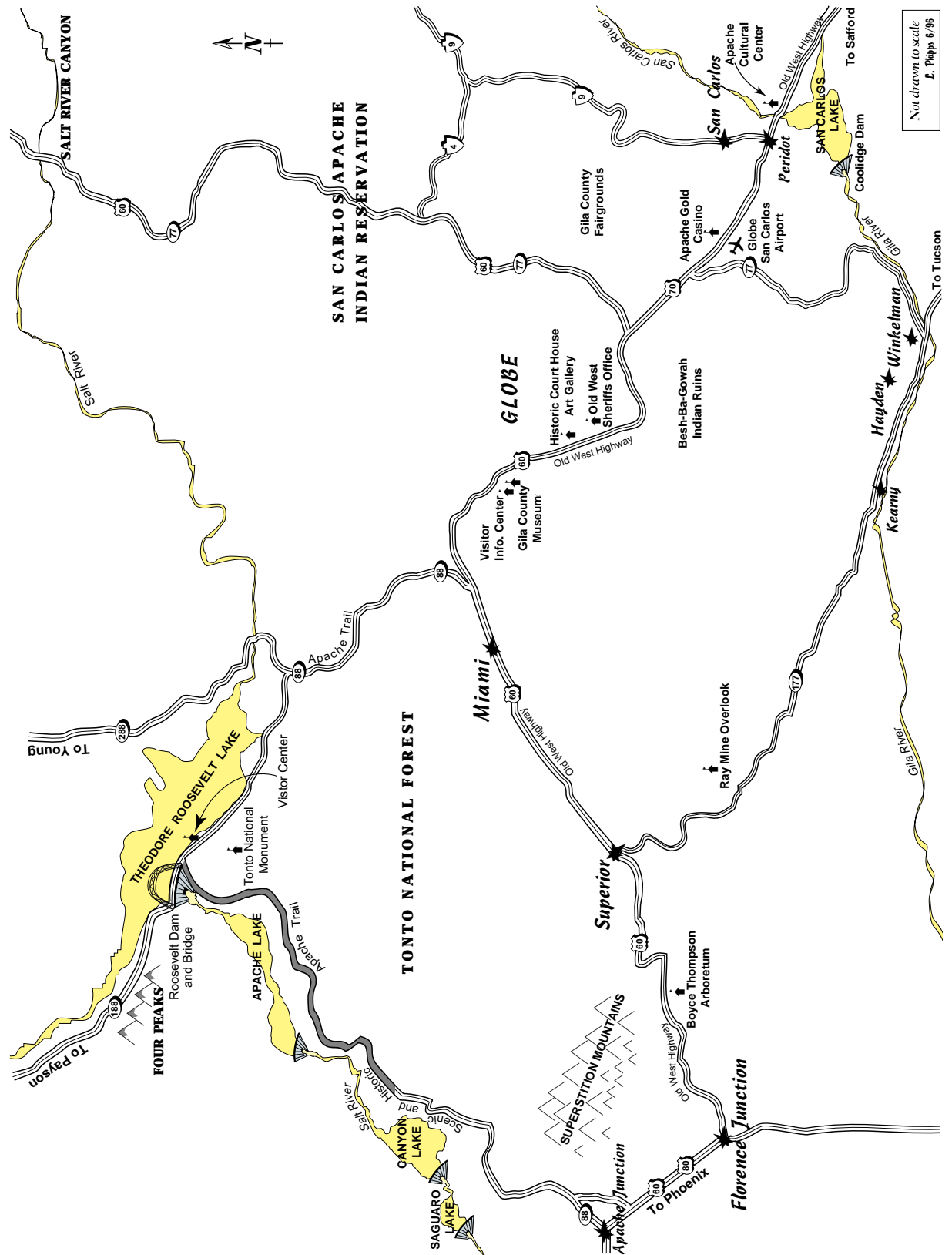
Roosevelt visitors- people who received a survey at Tonto National Monument or Roosevelt Lake Visitor Center or the Roosevelt Lake Marina. These data do not include most of the people engaged in activities such as boating and camping at Roosevelt Lake.

The expenditure and economic impact data is pre-

sented for total visitors and for the three main types of visitor listed above. Visitor and trip characteristic data is presented in separate chapters for overnight, day trip and Roosevelt visitors. For readers who wish to compare key trip and visitor characteristics across visitor types, summary tables are provided in Appendix C. Evaluations of local attractions, lodging, restaurants, shops and the community are presented only for total visitors.

Throughout this report reference is made to the Globe-Miami region. This is basically the Southern half of Gila County. It includes the Roosevelt Lake area to the northwest down to San Carlos Lake to the southeast (see Figure 1). The communities of Globe and Miami anchor the region and provide the bulk of lodging, eating and shopping venues in the region.

Figure 1. Map of the Globe-Miami Region and Area Attractions





III. Visitor Numbers and Expenditures

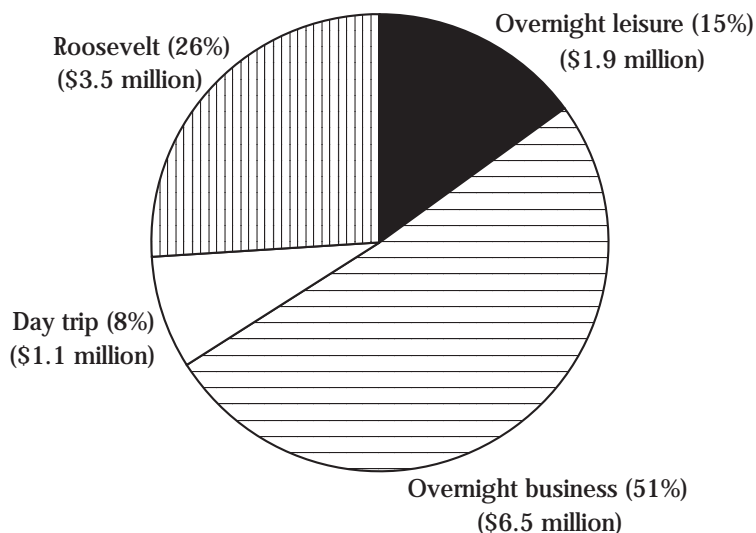
Approximately 260,000 people visited the Globe-Miami region between October 1995 and September 1996 (Table 1). Fifty-six percent of these visitors came during the peak season. Over half of them were visitors to the Tonto National Monument or the Roosevelt Lake/Tonto National Forest Visitor Center. While the figures for the overnight visitors and Roosevelt visitors are quite reliable, the estimates for day trip visitors are less so because of the lack of adequate mechanisms for counting visitors at key attractions in the City of Globe. A door counter has been installed at the Chamber of Commerce Visitor Center and counters are recommended for the Art Center and Besh Ba Gowah. Although day trip visitors and Roosevelt visitors (most of who are not spending the night in the region) are estimated to be 73 percent of total visitors, they account for only 34 percent of estimated expenditures (see Table 1 and Figure 2).

Total visitor expenditures to the Globe-Miami region were estimated to be approximately \$13.6 million dollars for the October 1995 to September 1996 period. Spending by overnight business travelers was estimated to be

Table 1. Number of Visitors to the Globe-Miami Region

	Shoulder	Peak	Low	Total	Percent of total
Overnight	18,000	36,000	16,000	70,000	27%
Leisure	5,000	8,000	4,000	17,000	7
Business	13,000	28,000	12,000	53,000	20
Day trip	14,000	10,000	11,000	45,000	17
Roosevelt	25,000	99,000	21,000	145,000	56
Total	57,000	145,000	48,000	260,000	100%

Figure 2. Total Expenditures by Type of Visitor



over half of this amount (Figure 2). Visitors to the Tonto National Monument and/or Roosevelt Lake Visitor Center spent another quarter of this amount. Free and independent travelers or leisure visitors to Globe-Miami who either stayed overnight or spent the day contributed 23 percent of this amount.

Half of the total expenditures made by visitors occurred during the peak season from January through May 1996 (Table 2). The amount spent by visitors each month of the shoulder and low season were very similar at just under \$1 million per month, while expenditures per month in the peak averaged almost \$ 1.4 million.

Table 2. Total Visitor Expenditures in the Globe-Miami Region by Season

Season	Amount <i>(in millions)</i>	Percent	Amount/month <i>(in millions of \$)</i>
Shoulder	\$3.7	28%	\$0.94
Peak	7.0	51	1.38
Low	2.9	21	0.96
Total	\$13.6	100%	\$1.13

Figure 3. Expenditure in the Globe-Miami Region by Category

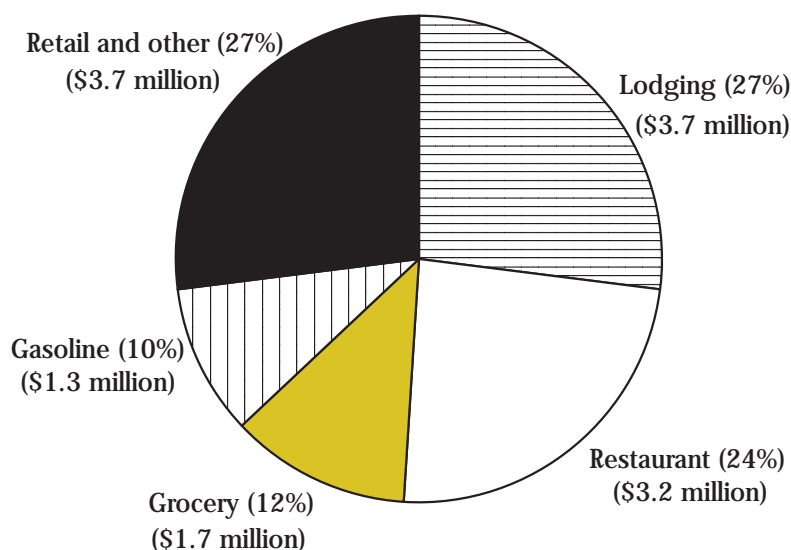


Table 3. Percent of Visitor Parties Making Specific Retail and Other Expenditures

	Overnight	Day trip	Roosevelt	Total
Fees, donations and admission	41%	46%	41%	42%
Books	22	17	29	24
Apparel	17	7	3	8
Souvenirs	40	34	35	41
Crafts	12	16	10	12
Art	6	7	3	5
Toiletries	17	3	8	9
Other	11	8	6	8
Antiques	6	5	0	3
Cloth/quilting supplies	1	2	1	1
Snacks	2	3	1	1

The leading expenditure categories were lodging, accounting for 27 percent of the total, restaurants (24 percent) and retail and other (23 percent). Estimated expenditures by all categories are included in Figure 3. The most popular retail and other expenditures were on fees, donations and admission, souvenirs and books. The percent of all visitor parties making specific retail and other expenditures is presented in Table 3.

Average expenditures per party and per visitor are broken out in Table 4. The average expenditure of the overnight visitor on a per person per day basis was over two times that of day trip and Roosevelt visitors. On a per party per trip basis, overnight visitor expenditures were over 4.5 times that of other visitors. This and the fact that over two-thirds of current tourism revenues come from overnight visitors, illustrates quite clearly why there is strong interest in focusing marketing and tourism development resources on the overnight visitor to the region.

Average expenditures per party trip and person day are presented by season in Table 5. While overnight visitors in the peak season spent slightly more than in the shoulder and low season, day trip and Roosevelt/Tonto visitors had higher average expenditures in the shoulder season.

When visitors were in the cities of Globe or Miami varied by type of visitor. Overall, the largest percent of visitors were in the cities from 10 a.m. to 3 p.m. (Table 6). However, the largest percent of overnight visitors were in the cities from 6 p.m. through 9 p.m., while heaviest visitation for day trip and Roosevelt/Tonto visitors was during the midday period.

While the average overall trip length of visitors to the region was almost 13 days, they spent less than 2 days in the Globe-Miami region (Table 7). One-third of all overnight visitors spent one day or less in the Globe-Miami region, compared to 98 and 91 percent of day trip and Roosevelt visitors. The average visitor had been to the Globe-Miami region four or five times before in the previous two years. Seventy-two percent of all visitors planned to return. The highest percent planning to return was among the overnight visitors.

Table 4. Average Expenditures in the Globe-Miami Region by Visitor Type
(in dollars)

Expenditure category	Overnight	Day trip	Roosevelt	Total
Per party per trip:				
Lodging	\$113	\$0	\$8	\$38
Restaurant	69	14	19	33
Grocery	31	3	15	18
Gasoline	25	4	10	13
Retail and other	73	44	17	38
Total	\$311	\$65	\$69	\$140
Per person per day:				
Lodging	\$18	\$0	\$3	\$10
Restaurant	11	5	7	9
Grocery	5	1	5	5
Gasoline	4	2	3	3
Retail and other	12	14	6	10
Total	\$50	\$22	\$24	\$37

Table 5. Average Expenditures in the Globe-Miami Region by Season
(in dollars)

	Shoulder (Sept.-Dec)	Peak (Jan.-May)	Low (June-Aug)
Per party trip:			
Overnight	\$244	\$336	\$344
Day trip	78	55	40
Roosevelt	112	49	91
Per person day:			
Overnight	43	53	49
Day trip	32	18	17
Roosevelt	49	16	34

Table 6. Percent of Visitors in Globe-Miami at Different Times During the Day

	Overnight	Day trip	Roosevelt	Total
All day	42%	11%	5%	16%
4-7 a.m.	74	15	6	27
7-10 a.m.	69	21	20	34
10 a.m.-noon	59	57	41	50
Noon-3 p.m.	56	72	39	52
3-6 p.m.	66	30	28	39
6-9 p.m.	78	13	11	30
9 p.m.-4 a.m.	72	15	5	26

Table 7. Trip Characteristics of Globe-Miami Region Visitors

	Overnight	Day trip	Roosevelt	Total
Average days in Globe area	5.07	0.25	0.43	1.66
Average total trip length (days)	12.9	9.2	14.9	12.9
Average times visited Globe- Miami region	4.1	5.9	4.1	4.6
Average people per party	2.4	2.7	2.8	2.7
Percent planning to return	79%	77%	66%	72%
Percent staying one day or less in area	35%	98%	91%	78%

IV. Economic and Fiscal Impacts

The 1993 IMPLAN input-output model for Gila County was used to estimate the jobs and income that are attributable to visitor spending in the Globe-Miami region.

An input-output model is a simple model of all sectors of the economy and is used frequently for economic impact analysis. The impact results presented here consist of three basic components, the *direct effects* or how visitor expenditures translate directly into jobs and income and the two components of the multiplier effect. The first component is called *indirect effects* and consists of how a visitor expenditure ripples through the local economy as businesses that serve visitors purchase services from other local businesses (for example, from laundry services, food wholesalers, accountants, banks, and other goods and service providers). These providers in turn make purchases from other local businesses. Hotels, restaurants and gift shops and the businesses they buy from, also purchase goods and services from outside of the local economy (in this case, the county). This represents leakage out of the local economy. The second component of the multiplier effect is called the *induced or consumption effect*. It consists of the expenditures by local employees at hotels, res-

taurants, gift shops and gas stations and the businesses that they buy from. For example, employees may purchase food, clothing and other goods and services within the county. A Type II multiplier rather than the IMPLAN Type III multiplier was used in estimating the induced impacts in this study.

The economic impacts on Gila County of visitor expenditures in the Globe-Miami region are presented in Table 8. The indirect and induced impacts occur mostly in Globe and Miami while at least a quarter of the direct impacts occur at Roosevelt Lake and Tonto National Monument. Visitor expenditures of \$13.6 million result in total sales revenue impacts of \$21.2 million in the region. From this sales revenue impact, \$9.4 million is total income impact or the amount that is paid to employees and to business owners. The direct total income impact is \$5.5 million. Visitor

spending in the region results in 634 jobs, of which 494 jobs are direct effects. The job impacts, like most available employment figures, are not full-time equivalents, but rather a mixture of full-time and part-time jobs. The job numbers are fairly high because of the number of part-time jobs in restaurants, hotels, and other retail shops. Most jobs at the Apache Gold Casino are not included in this figure. The Casino only began operating from its new resort site after the survey was completed.

Visitor spending in the Globe-Miami region generated \$348,700 in tax revenues for the Cities of Globe and Miami, \$322,600 for Gila County and \$732,000 for the State of Arizona. In other words, visitor spending in the Globe-Miami region is responsible for over 1.4 million dollars in tax revenue generated for state and local governments. Fiscal impacts are the state and

Table 8. Economic Impacts of Visitor Spending in the Globe-Miami Region

	Sales revenues (million \$)	Total income (million \$)	Employment jobs
Direct	\$13.6	\$5.5	494
Indirect and induced	7.6	3.9	140
Total	\$21.2	\$9.4	634

local government revenues that are generated either directly by visitor spending, or induced through the income created through visitor spending. These fiscal impacts are

presented for the cities of Globe and Miami (together), Gila County and the State of Arizona in Table 9. These estimates were reached using the fiscal impact model devel-

oped by Horn and Charney for Gila County and Globe-Miami. A more detailed description of the model is available from the authors on request.

Table 9. Fiscal Impacts of Visitor Spending in the Globe-Miami Region
(in thousand \$)

	Direct	Induced	Total
State revenues (retained by the state)			
Income tax	\$	\$126.8	\$126.8
Sales tax	348.8	100.1	448.9
Highway User Revenue Fund	121.8	23.1	144.9
Vehicle license tax		6.6	6.6
Property tax		4.8	4.8
Total state revenues	470.6	261.4	732.0
Gila County revenues			
State shared sales tax	42.9	17.2	60.1
State shared Highway User Revenue Fund	81.1	17.6	98.7
Vehicle license tax		4.4	4.4
Property tax		35.2	35.2
County sales taxes	98.2	26.0	124.2
Total Gila County revenues	222.2	100.4	322.6
Cities of Globe and Miami revenues			
Urban revenue sharing		15.2	15.2
State shared sales tax	0.2	12.9	13.1
State shared Highway User Revenue Fund	34.2	11.2	45.4
Vehicle license tax		2.0	2
Property tax		17.3	17.3
City sales tax	107.2	40.4	147.6
City bed tax (5 % in Globe)	108.1		108.1
Total Globe and Miami revenues	249.7	99.0	348.7
Total tax revenues	\$942.5	\$460.8	\$1,403.3

V. Overnight Visitor Profile

Targeting overnight visitors is an important part of the Globe-Miami Tourism Authority's strategy to focus on 'valued added' tourism. Value added tourism is any form of tourism that attempts to enhance a visitors' experience in order to increase the amount of money a visitor spends in the community. Encouraging overnight stays is one of the most effective ways to add value. Increasing the number of 'for fee' attractions and activities and offering 'for fee' tour services are other ways. To effectively market to these visitors, it is important to understand who they are and what they like to do. During the study period, most overnight visitors were in the Globe-Miami region on business or to work. Often these visitors spent extended periods of time in the region and few of them responded to this survey. The following results reflect primarily a profile of more leisure oriented overnight visitors.

Thirty-seven percent of all overnight visitors are from Arizona (compared to 65 percent of all day trip and Roosevelt visitors). Over one-quarter come from other Western states and seven percent are international visitors (Table 10).

Almost one-quarter of the overnight visitors indicate that

Globe/Miami is one of their destinations. Another 56 percent indicate that other parts of Arizona are their destination (Table 11). Only about 12 percent are on extended trips to more than one or two states. About 37 percent indicate that they are in the area to see a specific local attraction.

Overnight visitors indicate a wide range of reasons for being in the region. The most commonly listed are to visit historical sites, to see friends and family, for business, and to pass through the region on the way to somewhere else. Table 12 provides the percent indicating one of the listed reasons as the primary purpose of their trip.

While overnight visitors are in the region, they engage in a variety of activities. Topping the list of activities is sight-seeing (72 percent), visiting historic sites (55 percent), visiting museums (32 percent), taking pictures (32 percent) and shopping

Table 10. Origin of Overnight Visitor Parties

	Percent
Arizona	38%
Phoenix	13
Tucson	12
Other Arizona	13
California	8
Rest of West	18
South	11
Central	13
East	7
International except Canada	5
Canada	2
Total	100%

Table 11. Destinations of Overnight Visitor Parties

	Percent
Globe-Miami	24%
Other Arizona	22
Phoenix	21
White Mountains/ Mogollon Rim	7
Roosevelt/Tonto	6
Western states	4
California	4
U.S. and International	3
Southwestern states	3
United States	2
New Mexico	2
Total	100%

Table 12. Primary Reason for Overnight Visitors to be in Globe-Miami Region

	Percent
To visit friends and family	21%
Business or work related	15
Just passing through the area	15
To visit Roosevelt Lake	7
To visit historical sites or museums	7
To visit Tonto National Monument	6
Outdoor recreation	6
To attend a festival or event	4
To visit Besh-Ba-Gowah	2
To follow the Old West Highway	2
To raft the Salt River Canyon	2
To learn about American Indians	2
On the way to the White Mountains	1
To visit Boyce Thompson Arboretum	1
Other	11

Table 14. Attractions Visited by Overnight Visitor Parties

	Percent
Historic Downtown Globe-Miami	48%
Roosevelt Lake	45
Besh-Ba-Gowah	36
Tonto National Monument	31
National forest/wilderness area	27
Antique and specialty shops	27
Globe-Miami Chamber Visitor Center	19
Apache Gold Casino	15
Boyce Thompson Arboretum	15
Cobre Valley Center for the Arts	15
Gila County Historical Museum	12
San Carlos Lake	9
San Carlos Apache Cultural Center	6
Old West Sheriff's Museum	3
Other	13

(31 percent) (Table 13). The strong historic interests of overnight visitors indicate one of the strengths of Globe-Miami as a visitor destination.

The most popular attractions for overnight visitors include historic downtown Globe,

Table 13. Activities of Overnight Visitor Parties

Activity	Percent
General sight-seeing	72%
Visit historic areas	55
Visit museums	32
Take photographs	32
Shopping	31
Hike/walk/job	21
Buy antiques	19
Buy/see art	14
Camp	13
Wildlife/bird watch	12
Attend festivals/events	10
Star gaze	10
Picnic	10
Fish	7
Rock hound	7
Swim/water sports	6
Boating	5
4-Wheel	3
Hunt	3
Golf	2
Bicycle	2
Eat at area restaurant	1
Ride horses	1
Visit friends and family	1
Other	9

Roosevelt Lake, Besh Ba Gowah, Tonto National Monument, antique shops and the National Forest (Table 14). These attractions are a mix of historic and outdoor sites.

The visitor parties that do come to the region include many couples without children, friends, business associates and relatives traveling together. Children repre-

sent a very small percent of current overnight visitors (Table 15). This is again evident in the age distribution of visitors in Figure 4. Almost half of all overnight visitors are in the 36 to 59 year old group, another quarter are 60 years of age or older, while only eight percent of all visitors are under the age of 18.

The most commonly listed interests of the overnight visitors are history, outdoor recreation, photography, books, shopping, music, conservation/ecotourism, gardening and antiques. A

Table 15. Relationship of Overnight Party Members to Survey Respondent

	Percent
Spouse	32%
Friends	20
Business associates	15
Other relatives	13
Children	6
Tour group members	5
Lone traveler	4
Other	5

Table 16. Interests of Overnight Visitors

	Percent
History	55%
Outdoors - hiking, camping, climbing	48
Photography	42
Books	40
Shopping	36
Music	34
Conservation/ecotourism	34
Gardening	31
Antiques	29
Crafts/art	25
Gourmet food	24
Rocks/geology	21
Fishing	19
Health and fitness	18
Golf	13
Religion	13
Water sports	12
Star gazing/astronomy	12
Boating	11
Collections	11
Gaming	11
Computers	10
Skiing	10
Hunting	10
Movies	8
Riding horses	8
Team sports	4
Video games	2
Flying	2
Other	10

Figure 4. Age Distribution of Overnight Visitors

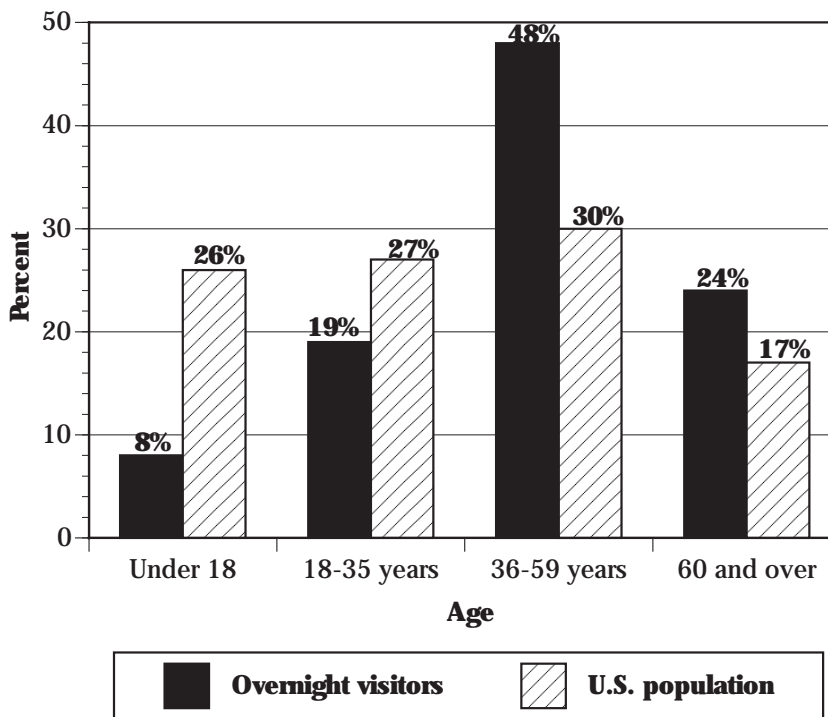


Table 17. Modes of Transportation of Overnight Visitor Parties on this Trip

	Percent
Own car	63%
Rental car	22
Airplane	12
Own RV	7
Rental RV	3
Other	12

Table 18. Percent of Overnight Parties with U.S. and Foreign Citizen Members

Percent of parties with members	
U.S. citizen	90%
Foreign citizen	10

complete list is presented in Table 16. The strong interests in history and the outdoors are reflected in overnight visitor activities and the attractions they chose to visit.

Virtually all visitors to the region come via car, truck or RV. However, 12 percent of all visitors have also flown during part of this trip (Table 17). Most of

the visitors indicating other modes of transportation, borrowed a vehicle from a friend or family member.

Figure 5 shows the distribution of income of overnight visitors. The median income range is \$40,001 to \$60,000. One-fifth of all visitors have household incomes of over \$80,000 per year.

Approximately 10 percent of all overnight visitor parties contain one or more members who are foreign citizens (Table 18). In addition, about eight percent of all overnight visitor parties include one or more members who are Hispanic (Table 19). Approximately 93 percent of all visitor parties include Caucasian or white members.

Figure 5. Household Income Distribution of Overnight Visitor Parties

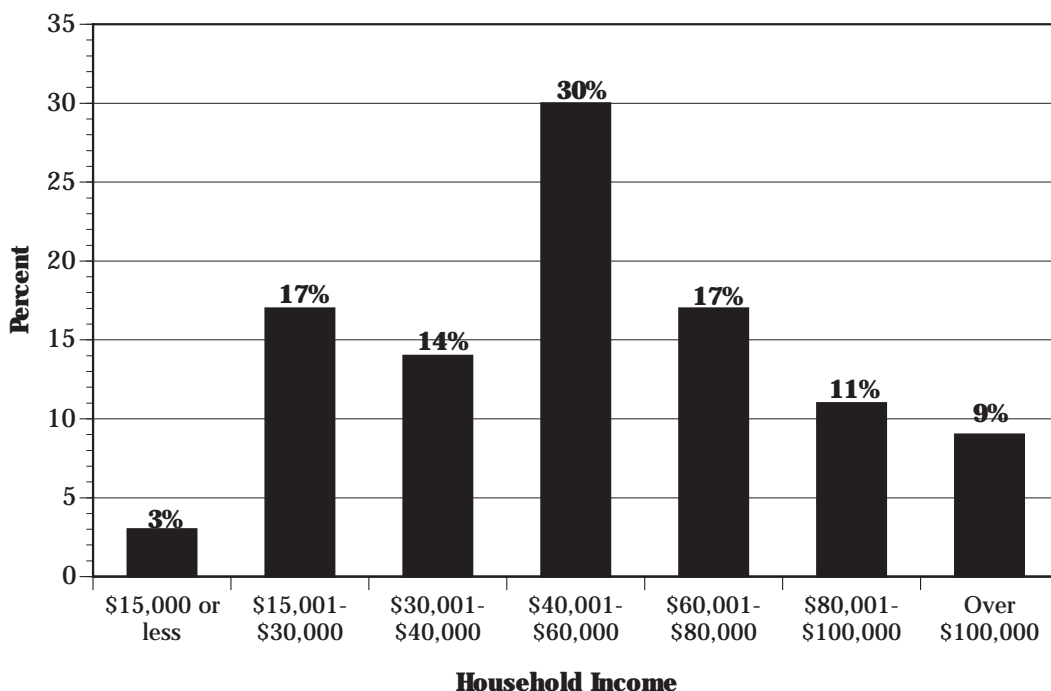


Table 19. Race and Ethnicity of Overnight Visitors

	Percent of parties with members
White	93%
Hispanic	8
Black	1
American Indian	3
Asian	2
Other	2

VI. Day Trip Visitors

Almost half of all day trip visitor parties are from Arizona (Table 20). Other Westerners are another 19 percent. In addition, about 14 percent of all day trip visitors are winter visitors to Arizona. Over one-fifth of day trip visitors mention that the Globe-Miami region is their main destination on this trip. Twenty-eight percent of day trip visitors are headed for Phoenix (Table 21).

The most commonly cited primary reason for being in the Globe-Miami region is because day trip parties are passing through the region, are going to visit Besh-Ba-Gowah or want to visit historical regions and museums (Table 22). Fewer day trip than overnight parties indicate they are in the region to visit family and friends.

The most popular activities of day trip visitor parties is general sight-seeing, visiting historical regions, visiting museums, shopping and photography (Table 23). This is very similar to the major activities of over-

Table 20. Origin of Day Trip Visitor Parties

	Percent
Arizona	47%
Phoenix	24
Tucson	8
Other Arizona	15
California	6
Rest of West	13
South	6
Central	16
East	8
International except Canada	1
Canada	4
Total	100%

Table 21. Destinations of Day Trip Visitor Parties

	Percent
Phoenix	28%
Globe-Miami	19
White Mountains/ Mogollon Rim	9
Roosevelt/Tonto	3
Other Arizona	23
California	5
Western states	5
United States	2
New Mexico	2
Southwestern states	2
U.S. and International	1
Total	100%

Table 22. Primary Reason for Day Trip Visitor Parties Trip to the Globe-Miami Region

	Percent
Just passing through the area	19%
To visit Besh-Ba-Gowah	15
To visit historical sites or museums	11
To attend a festival or event	7
Business or work related	6
To visit friends and family	5
To visit Boyce Thompson Arboretum	5
To visit Roosevelt Lake	4
To visit Tonto National Monument	4
To raft the Salt River Canyon	2
Outdoor recreation	2
On the way to the White Mountains	2
To learn about American Indians	2
To follow the Old West Highway	1
To visit Apache Gold Casino	1
To visit Cobre Valley Center for the Arts	1
Other	14

Table 23. Activities of Day Trip Visitor Parties in the Globe-Miami Region

Activity	Percent
General sight-seeing	68%
Visit historic areas	51
Visit museums	35
Shopping	28
Take photographs	21
Buy antiques	14
Buy/see art	14
Attend festivals/events	9
Hike/walk/job	7
Picnic	6
Wildlife/bird watch	6
Camp	4
Rock hound	3
Eat at area restaurant	3
Fish	2

night visitors. However, day trip visitors indicate they are hiking or walking much less frequently than overnight or Roosevelt visitors.

The favorite attractions of day trip visitors are Besh-Ba-

Gowah, historic downtown Globe-Miami, Roosevelt Lake, antique and specialty shops and Boyce Thompson Arboretum (Table 24). The Arboretum is significantly more popular with day trip than with overnight visitors.

books, outdoor recreation, shopping, antiques, photography, crafts and art (Table 26). They are significantly more interested in antiques, art and crafts than overnight visitors.

Virtually all day trip visitors came to the region in their own car or a rental car (Table 27). Only eight percent rode an airplane during this trip compared to 12 percent of overnight visitors. Seven percent used an RV on this trip compared to 10 percent of overnight visitors.

The median income range for day trip visitors is also \$40,001 to \$60,000 per household per year (Figure 7). However, only 12 percent have incomes over \$80,000 per year compared to 20 percent of all overnight visitors.

Table 24. Attractions Visited by Day Trip Visitor Parties on this Trip

	Percent
Besh-Ba-Gowah	44%
Historic Downtown Globe-Miami	42
Roosevelt Lake	30
Antique and specialty shops	29
Boyce Thompson Arboretum	24
Globe-Miami Chamber Visitor Center	19
Tonto National Monument	18
Cobre Valley Center for the Arts	14
Apache Gold Casino	11
National forest/wilderness area	10
Gila County Historical Museum	9
San Carlos Lake	6
Old West Sheriff's Museum	3
San Carlos Apache Cultural Center	2
Other	13

Day trip parties, like overnight parties, contain few children (Table 25). Many are traveling with their spouse, with friends or with other relatives. Day trip visitors tend to be older on average than overnight visitors. Half of all day trip visitors are 60 years of age or older (Figure 6).

The most popular interests of day trip visitors are history,

Table 25. Relationship of Day Trip Party Members to Survey Respondent

	Percent
Spouse	35%
Friends	24
Business associates	1
Other relatives	16
Children	6
Tour group members	7
Lone traveler	4
Other	8

Figure 6. Age Distribution of Day Trip Visitors

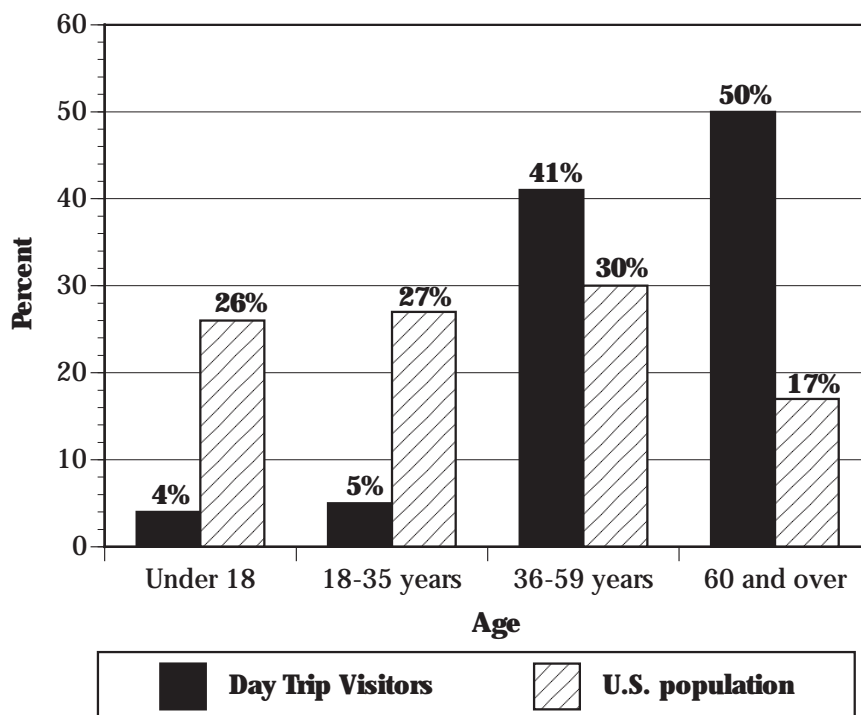


Table 26. Interests of Day Trip Visitor Parties

	Percent
History	59%
Books	46
Outdoors - hiking, camping, climbing	44
Shopping	42
Antiques	37
Photography	36
Crafts/art	36
Gardening	33
Music	31
Conservation/ecotourism	26
Religion	20
Gourmet food	19
Rocks/geology	17
Golf	16
Health and fitness	13
Gaming	13
Fishing	13
Computers	11
Collections	10
Movies	8
Boating	7
Riding horses	7
Skiing	7
Water sports	6
Star gazing/astronomy	6
Hunting	6
Team sports	4
Video games	3
Flying	3
Other	11

Figure 7. Household Income Distribution of Day Trip Visitor Parties

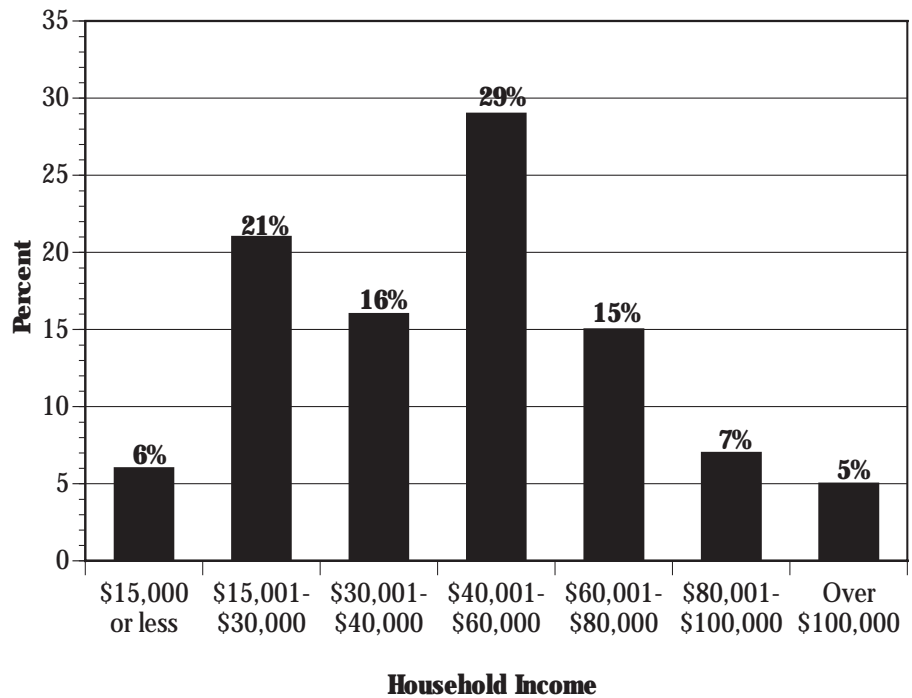


Table 27. Modes of Transportation of Day Trip Visitor Parties During this Trip

	Percent
Own car	73%
Rental car	20
Airplane	8
Own RV	6
Other	4

Table 28. Citizenship of Day Trip Visitor Parties

Percent of parties with members	
U.S. citizen	93%
Foreign citizen	7

Table 29. Race and Ethnicity of Day Trip Visitors

	Percent of parties with a member
White	93%
Hispanic	3
Black	3
American Indian	3
Asian	2
Other	1

Seven percent of day trip visitor parties include one or more members who are foreign citizens compared to 10 percent of overnight parties (Table 28). There tend to be fewer parties with Hispanic members among day trip parties than among overnight visitors (Table 29).



VII. Roosevelt/Tonto Visitors

Almost half of all Roosevelt/Tonto visitors are from Arizona, nearly a quarter come from the Phoenix region (Table 30). Like the day trip visitors, Phoenix and other places in Arizona are more likely to be their destination than the Globe-Miami or Roosevelt/Tonto region (Table 31).

The primary reasons for being in the region are to visit Roosevelt Lake (24 percent) or to visit Tonto National Monument (23 percent) (Table 32). The 15 percent who indicate they are just passing through the region is the same as the percent of overnight visitors who indicate they are just passing through.

Roosevelt/Tonto visitors enjoy general sight-seeing, visiting historic sites, taking photographs, hiking or walking and visiting museums while in the region (Table 33). Not surprisingly, the most popular attrac-

Table 30. Origin of Roosevelt/Tonto Visitor Parties

	Percent
Arizona	48%
Phoenix	24
Tucson	8
Other Arizona	16
California	7
Rest of the West	10
South	8
Central	14
East	7
International except Canada	3
Canada	3
Total	100%

Table 31. Destination of Roosevelt/Tonto Visitor Parties

	Percent
Phoenix	21%
Globe-Miami	16
Roosevelt/Tonto	16
White Mountains/ Mogollon Rim	11
Other Arizona	22
Southwestern states	3
California	3
United States	3
Western states	2
New Mexico	1
U.S. and International	1
Total	100%

Table 32. Primary Reason for Visiting Roosevelt/Tonto Area

	Percent
To visit Roosevelt Lake	24%
To visit Tonto National Monument	23
Just passing through the area	15
To visit friends and family	8
Business or work related	7
To visit historical sites or museums	5
Outdoor recreation	3
Other	13

Table 33. Activities of Roosevelt/Tonto Visitor Parties

Activity	Percent
General sight-seeing	81%
Visit historic areas	55
Take photographs	39
Hike/walk/job	24
Visit museums	23
Picnic	15
Shopping	15
Wildlife/bird watch	12
Camp	10
Fish	6
Swim/water sports	4
Buy antiques	3
Star gaze	3
Boating	3
Buy/see art	3
Bicycle	3
Rock hound	3
4-Wheel	3
Hunt	2
Other	8

Table 34. Attractions Visited by Roosevelt/Tonto Visitor Parties During this Trip

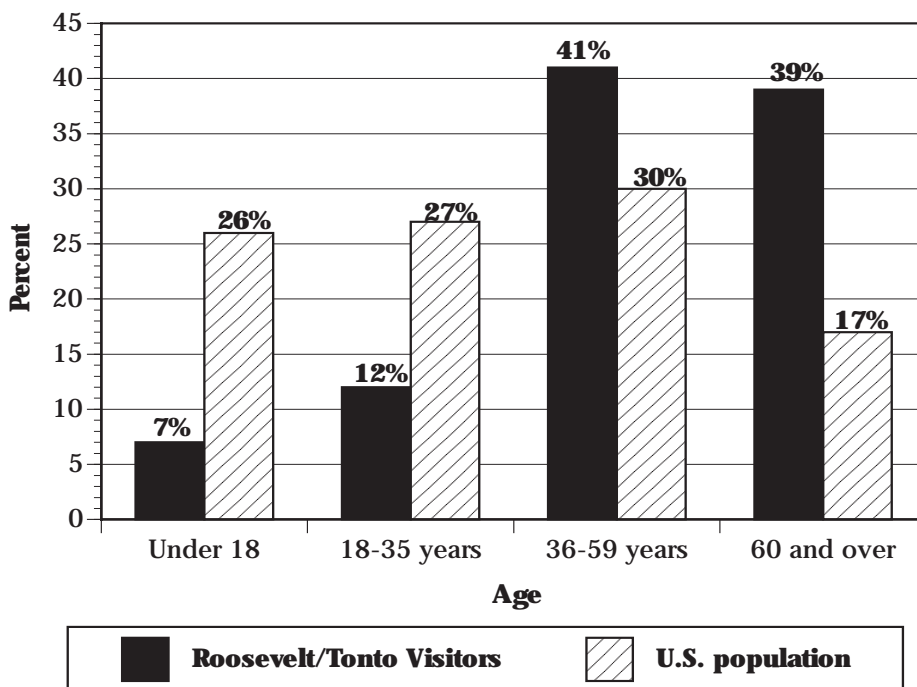
	Percent
Roosevelt Lake	82%
Tonto National Monument	65
National forest/wilderness area	29
Historic Downtown Globe-Miami	23
Besh-Ba-Gowah	16
Boyce Thompson Arboretum	15
Globe-Miami Chamber Visitor Center	10
Apache Gold Casino	9
Antique and specialty shops	9
San Carlos Lake	8
Gila County Historical Museum	3
San Carlos Apache Cultural Center	2
Old West Sheriff's Museum	2
Cobre Valley Center for the Arts	1
Other	7

Table 35. Relationship of Roosevelt/Tonto Visitor Party Members to Survey Respondent

	Percent
Spouse	32%
Friends	26
Business associates	1
Other relatives	17
Children	11
Lone traveler	4
Other	8

spouses, friends and other relatives (Table 35). Overall, children are still only seven percent of all party members. The Roosevelt-Tonto parties contain more over 60 year old members than overnight visitors but less than the day trip visitors (Figure 8).

Figure 8. Age Distribution of Roosevelt/Tonto Visitors



The top interests of Roosevelt-Tonto visitors include outdoor recreation, photography, history, books, shopping and music (Table 36). They are much less interested in antiques than either the day trip or overnight visitors.

Roosevelt/Tonto visitors also rely primarily on cars for transportation. About six percent of all

tions for these visitors are Roosevelt Lake, Tonto National Monument, National forests and wilderness regions, and historic downtown Globe-Miami (Table 34).

Roosevelt/Tonto visitor parties contain slightly larger numbers of children than the other two groups. Although, generally the traveling companions of the respondents are

parties rode an airplane during this trip (Table 37).

Nineteen percent of Roosevelt/Tonto visitor parties have household incomes of over

Table 36. Interests of Roosevelt/Tonto Visitors

	Percent
Outdoors- hiking, camping, climbing	59%
Photography	53
History	49
Books	43
Shopping	35
Music	33
Gardening	31
Conservation/ ecotourism	30
Health and fitness	22
Crafts/art	21
Golf	21
Fishing	21
Gourmet food	21
Boating	19
Religion	18
Antiques	16
Water sports	15
Computers	13
Rocks/geology	13
Hunting	11
Skiing	11
Gaming	11
Team sports	9
Star gazing/astronomy	9
Movies	9
Collections	6
Video games	6
Riding horses	4
Flying	1
Others	8

Table 39. Race and Ethnicity of Roosevelt/Tonto Visitors

	Percent of parties with members
White	96%
Hispanic	3
Black	0
American Indian	3
Asian	3
Other	1

Figure 9. Household Income Distribution of Roosevelt/Tonto Visitor Parties

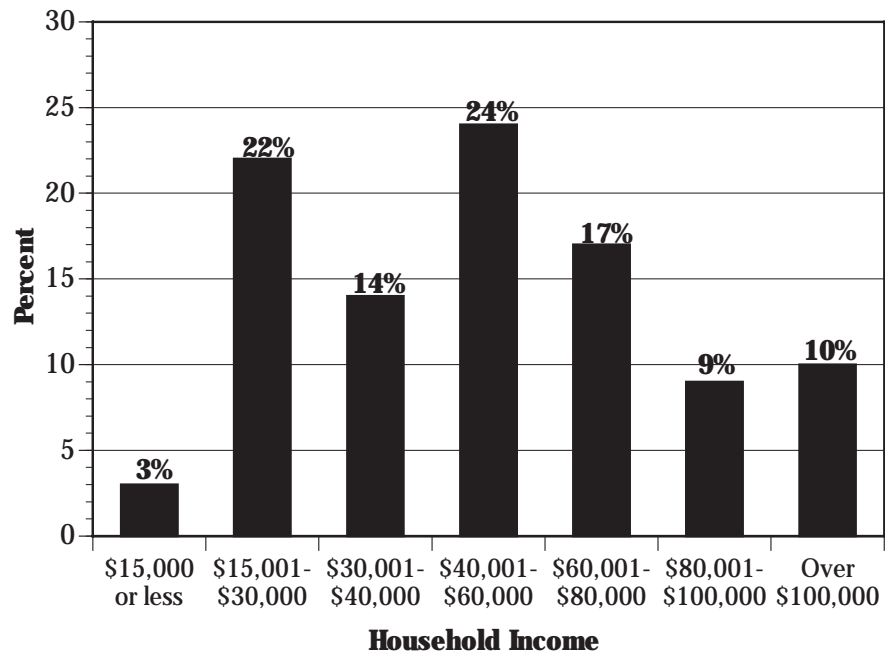


Table 37. Modes of Transportation Used by Roosevelt/Tonto Visitor Parties on this Trip

	Percent
Own car	67%
Rental car	22
Own RV	9
Airplane	6
Other	5

Table 38. Citizenship of Roosevelt/Tonto Visitors

	Percent
U.S. citizen	94%
Foreign citizen	6

\$80,000 per year and 25 percent with incomes of \$30,000 or less per year (Figure 9). It is fairly common to see visitor parties at all levels of household income when looking at outdoor recreation regions like Roosevelt Lake and Tonto National Monument.

Only six percent of all Roosevelt parties have one or more members who is a foreign citizen (Table 38). These visitors parties also are slightly less diverse in terms of ethnicity and race (Table 39).



VIII. Visitors' Evaluations and Travel Information Preferences

Visitors to the Globe-Miami region like the friendly people, scenery, small town feeling and history of the region. These are the most frequently cited aspects of the region that visitors like although the ranking varies between the types of visitors (Table 40).

Sixty-two percent of all visitors have suggestions concerning how the region can be improved (Table 41). However, there are many different opinions about what should be done. The most commonly indicated suggestions are to provide maps of the region, develop a mining view point, improve road signs, clean up the town and provide more public restrooms.

Overnight visitors have the largest number of respondents indicating that they could not find something that they wanted to buy or do while they were in the Globe-Miami region (Table 42). The items or activities that visitors look for are extremely diverse.

Most visitors rate local accommodations in the very good to excellent range (Table 43). Visitors are most impressed with the service, value and cleanliness of local accommodations. The biggest concerns of

Table 40. What Visitors Like About the Globe-Miami Region
(percent)

	Overnight	Day trip	Roosevelt	Total
Friendly people	65%	56%	32%	55%
The scenery	62	45	52	53
Small town feeling	59	54	29	51
The history of the place	49	55	39	50
The climate	44	28	24	33
Quiet, peaceful place	41	27	26	32
Mining town feel	22	26	14	23
Cleanliness	16	12	10	13
Other	7	8	4	7

Table 41. Suggestions Made by Visitors for Improving the Globe-Miami Region
(percent)

	Overnight	Day trip	Roosevelt	Total
Total responding with concerns	70%	56%	61%	62%
Maps of the area	26	21	20	23
Mining viewpoint	24	18	16	20
Improve road signs	17	12	16	14
Clean up town	14	11	14	13
More public restrooms	16	12	11	13
Better access to viewpoints	11	9	13	11
Later store hours	15	5	9	9
More parking	7	5	10	7
More picnic areas	8	6	5	7
Improve customer service	3	1	4	2
Other	23	16	18	19

Table 42. Percent of Visitor Parties that Could Not Find What They Wanted

	Overnight	Day trip	Roosevelt
Could not find	17%	13%	11%
Found	70	74	74
No answer	13	13	15

visitors are with the noise level and the choice and variety of accommodations in the region.

The ratings for restaurants tend to be slightly lower overall but still in the very good range (Table 44). Visitors rate value, days and hours

of operation, and service fairly high. The lowest ranked areas are having segregated smoking and non-smoking areas, the restrooms, and the decor.

The ratings for shops are slightly lower than for accom-

modations or restaurants (Table 45). Visitors are most positive about the service at shops and most critical of the appearance of buildings and the choice and variety of merchandise.

Region attractions are rated more positively overall than accommodations, restaurants and shops (Table 46). Visitors give attractions high marks for parking areas, service, and maintenance of the attraction. The two areas that have the most fair to poor ratings are the availability of unique gifts and the accessibility of the attraction.

The most common way for visitors to have heard of Globe-Miami is through friends and family, guide books and brochures (Table 47). The other category is also quite high and includes large numbers of people who indicated that they have lived in Arizona all their lives and have always known about the Globe-Miami region. Day trip visitors and Roosevelt visitors are more likely to have heard of the region through a brochure than over-

Table 43. Ratings of Accommodations in the Globe-Miami Region
(percent)

	Excellent	Very good	Good	Fair	Poor
Choice/variety of accommodations	27%	31%	28%	11%	3%
Cleanliness	35	33	22	7	2
Service	41	33	19	6	1
Value	36	30	20	11	2
Decor/furnishings	30	30	20	11	2
Heating/cooling	27	34	26	10	2
Noise level	29	28	25	13	5

Table 44. Ratings of Restaurants in the Globe-Miami Region
(percent)

	Excellent	Very good	Good	Fair	Poor
Choice/variety of food	18%	35%	34%	11%	2%
Cleanliness	19	38	34	8	1
Service	21	41	28	8	2
Decor	17	32	35	15	2
Value	24	38	31	5	2
Hours/days of operation	22	38	35	6	2
Restrooms	16	30	37	14	3
Noise level	16	34	38	9	3
Segregated smoking area	23	26	26	13	12

Table 45. Ratings of Shops in the Globe-Miami Region
(percent)

	Excellent	Very good	Good	Fair	Poor
Choice/variety of merchandise	18%	27%	36%	17%	2%
Cleanliness	18	29	39	12	2
Appearance of displays	18	29	39	12	2
Appearance of building	16	30	36	15	4
Service	26	34	33	6	1
Value	19	31	40	9	2

night visitors. Roosevelt visitors are more likely to have heard of the region through a guide book than overnight or day trip visitors.

While on their trip, visitors rely on brochures and newsletters, staff at visitor centers, books and guides and displays at visitor centers for their travel information (Table 48). The most highly preferred ways of receiving travel information are through written materials or through talking to knowledgeable staff (Table 49).

Table 46. Ratings of Attractions in the Globe-Miami Region
(percent)

	Excellent	Very good	Good	Fair	Poor
Quality of displays/views	35%	42%	19%	3%	1%
Entertainment value	29	41	23	5	2
Cleanliness	34	37	22	6	1
Maintenance of attraction	37	36	20	5	2
Service	37	38	21	3	1
Accessibility	31	36	23	7	3
Parking	38	32	22	6	2
Hours/days of operation	31	37	25	5	1
Availability of unique gifts	21	3%	28	11	3

Table 47. How Visitors First Learned About the Globe-Miami Region
(percent)

	Overnight	Day trip	Roosevelt	Total
Friends and family	37%	37%	39%	37%
Guide book	20	18	25	20
Brochure	10	16	15	14
Roadside signs	9	10	11	10
Newspaper article	4	8	9	7
Don't remember	6	6	11	7
Magazine	3	5	6	5
Newspaper ad	2	3	4	3
Travel agent	2	1	1	1
Other	37	33	22	33

Table 48. Types of Travel Information Used on this Trip
(percent)

	Overnight	Day trip	Roosevelt	Total
Maps	55%	40%	64%	50%
Brochures and newsletters	49	37	32	40
Staff at visitor center	29	26	44	30
Books and guides	31	17	27	24
Displays at visitor center	24	19	38	24
Tours or interpretive programs	7	9	11	9
Video tapes	5	7	6	6
Audio tapes	1	1	4	1
Computer programs	1	0	1	0
Other	20	12	7	14

Table 49. How Visitors Prefer to Receive Travel Information
(percent)

	Overnight	Day trip	Roosevelt	Total
Written material	73%	65%	70%	69%
Video or computer program	11	12	19	13
Activities I can do myself	40	33	36	36
Self-explained exhibits	36	32	45	36
Staff to talk to	46	49	50	48
Audio programs on cassette	3	6	9	5
Talk/lecture/slide show	15	18	30	19
Other	5	3	4	4

IX. Profiles of Specific Types of Visitors

In addition to looking at visitors by whether they were staying overnight, visiting the Globe-Miami region on a day trip or were visiting the Roosevelt-Tonto region, it is also possible to split the data into other market or visitor segments. Five such segments are presented here. The first is called “big spend-

ers” and consists of all visitor parties with per person per day expenditures of more than \$50. The second, is called “Besh” and consists of all visitor parties that visited Besh-Ba-Gowah during their trip. A third important group of visitors are those who indicate that one of their three top reasons for being in the region

is to visit historic sites. These are called “historic”. Likewise, “outdoor” are visitors who indicate that outdoor recreation is one of their top three reasons for coming to the region. The last group is called “winter” and consists of winter visitors who are living in Arizona for more than one month of the year. These groups are not

Table 50. General Characteristics of Specific Visitor Groups

	Big spenders	Besh visitors	Historic	Outdoor	Winter	Total
Number of observations	186	308	261	109	123	923
Percent of total visitor parties	16%	28%	30%	15%	14%	100%
Average days in Globe-Miami region	1.4	1.5	1.4	2.3	2.1	1.4
Average total trip length (days)	12.3	12.8	10.8	13.6	26.1	12.9
Average number of trips to region	7.5	5.2	4.1	8.2	3.9	4.6
Average number of people per party	1.9	2.6	2.6	2.4	2.8	2.7
Percent overnight in Globe	35%	36%	30%	17%	7%	27%
Percent planning to return	87%	75%	77%	83%	85%	72%
Expenditures in Globe-Miami region (in dollars)						
Per person day	\$111	\$44	\$39	\$37	\$37	\$37
Per person trip	\$163	\$79	\$60	\$76	\$98	\$52
Per party trip	\$292	\$174	\$139	\$202	\$221	\$140
Percent of total expenditures made by this group	33%	33%	29%	21%	22%	100%
Age distribution (percent)						
17 or younger	3%	7%	7%	8%	1%	7%
18-35 years old	17%	14%	15%	24%	4%	13%
36-59 years old	47%	45%	40%	36%	30%	43%
60 years or older	33%	34%	38%	32%	65%	37%
Income distribution (percent)						
\$30,000 or less	17%	23%	22%	29%	29%	24%
\$30,001-\$60,000	49%	47%	44%	34%	52%	41%
Over \$60,000	35%	31%	34%	36%	19%	35%

mutually exclusive. The same visitor party could be included in several segments. For example, a visitor party might qualify as a Besh, historic, and winter visitor. The total category describes all visitors to the region as one group.

Table 50 presents a summary of many of the general characteristics of these visitors. Big spenders and historic visitors tend to spend fewer days on average in Globe than other visitors. Winter visitors are on the longest overall trips while historic visitors are on the shortest trips. Outdoor visitors and big spender visitors have taken the largest number of trips to the region in the past two years. Big spenders tend to have the smallest average party size while winter visitors have the largest average size.

Big spenders and outdoor visitors are the most likely to have spent time overnight in the Globe-Miami region and they are also the most likely to indicate that they plan to return to the region. The visitors with the lowest per person per day expenditures are outdoor and winter visitors. However, historic and outdoor visitors have the lowest per party per day expenditures, while historic and Besh visitors have the lowest per party per trip expenditures.

Winter visitors have the oldest age profile, while outdoor visitors have the youngest. Even outdoor visitors tend to be older on average than the general U.S. population. Outdoor visitors have the highest percent of parties in the lower household income category (tied with winter visitors) and the most in the highest in-

come category (followed by big spenders and historic visitors).

Large shares of all visitor types engage in general sight-seeing (Table 51). Historic and Besh visitors are most likely to visit historic regions and museums. Historic and outdoor visitors have a slightly higher percentage of members who are taking photographs. Big spenders and historic visitors are the most likely to be shopping during their trip, while almost half of the outdoor recreation visitors hike or walk. Outdoor visitors are more likely than other visitors to engage in activities such as picnicking, wildlife and bird watching, camping, fishing, star gazing and hunting, but they are less likely than the others to look at and buy art, or to be attending festivals or events.

Table 51. Major Activities of Specific Visitor Groups
(percent)

	Big spenders	Besh visitors	Historic	Outdoor	Winter	Total
General sightseeing	73%	76%	85%	71%	83%	75%
Visiting historic areas	56	77	83	48	59	54
Picture taking	31	30	38	39	30	33
Visiting museums	29	49	57	33	31	28
Shopping	42	27	32	16	27	22
Hiking/walking/jogging	16	21	17	47	15	19
Picnicking	7	11	11	21	13	12
Buying antiques	23	11	18	11	13	10
Wildlife/bird watching	12	13	10	22	10	10
Camping	7	7	8	36	10	9
Looking at/buying art	17	12	18	5	10	8
Attending festivals/events	14	9	12	4	10	6
Fishing	5	3	1	19	5	5
Swimming/water sports	3	1	3	11	2	4
Star gazing	5	4	3	16	7	4
Hunting	3	2	0	12	0	2

Roosevelt Lake is the most popular attraction among all visitors, winter and outdoor visitors, while historic downtown Globe-Miami is the most popular attraction among big spender and historic visitors (Table 52). Outdoor visitors are less likely to visit Besh-Ba-Gowah, Boyce-Thompson Arboretum and Cobre Valley Center for the Arts than the other visitors, but more likely to visit national forest and wilderness regions. All but the outdoor visitors are more likely to visit Cobre Valley Center for the Arts than the average visitor to the Globe-Miami region. And all of these segments are more likely than the average visitor to stop in at the Globe-Miami Chamber of Commerce Visitor Center. The

antique and specialty shops are particularly popular among big spender and historic visitors. Besh and winter visitors show the most interest in Boyce Thompson Arboretum.

Interests of the different visitor segments, like the activities and attractions visited, tend to vary somewhat between visitor types (Table 53). Overall, history is the top interest for all but the outdoor visitors, who rank outdoor recreation as their top interest. Outdoor recreation is the second highest interest for the remaining segments. Photography is most popular among outdoor visitors. Besh visitors show the most interest in books. The winter, big spender and historic visitors all indicate

strong interests in shopping. Outdoor visitors are highly interested in conservation and ecotourism compared to the other segments. Big spenders show the strongest interest in antiques.

These tables can be very helpful to the individual who wants to target one of these specific types of visitors. The tables provide information about who these visitors are and what they like to do. The table as a whole can be useful for comparison purposes in discovering which segments are most interested in specific activities and attractions. The tables are useful when trying to decide which group is most appropriate to target in specific marketing campaigns.

Table 52. Local Attractions Visited During Stay
(percent)

	Big spenders	Besh visitors	Historic	Outdoor	Winter	Total
Roosevelt Lake	44%	48%	48%	59%	59%	59%
Tonto National Monument	32	36	38	38	46	44
Historic Downtown Globe-Miami	56	53	52	39	49	35
Besh-Ba-Gowah	41	100	49	28	34	28
National forest/wilderness area	26	24	24	45	26	24
Antique and specialty shops	41	27	35	15	25	19
Boyce Thompson Arboretum	21	32	25	12	31	17
Globe-Miami Chamber Visitor Center	20	23	23	21	20	15
Apache Gold Casino	18	13	10	10	15	11
Other	12	9	12	18	13	10
Cobre Valley Center for the Arts	14	17	22	9	13	8
San Carlos Lake	14	8	7	11	9	7
Gila County Historical Museum	12	14	18	9	8	7
San Carlos Apache Cultural Center	8	6	7	4	5	3
Old West Sheriff's Museum	5	2	5	0	3	2

Table 53. Interests of Specific Groups of Visitors
(percent)

	Big spenders	Besh visitors	Historic	Outdoor	Winter	Total
History	62%	72%	73%	42%	62%	54%
Outdoor recreation	42	58	51	78	38	53
Photography	40	44	45	50	40	44
Books	36	50	49	44	42	43
Shopping	39	35	39	22	43	39
Music	32	34	35	30	30	33
Gardening	34	36	37	22	24	32
Conservation/ecotourism	32	38	34	46	24	31
Crafts/art	31	27	36	21	30	27
Antiques	42	29	34	12	31	25
Gourmet food	22	21	23	20	15	24
Fishing	18	15	13	30	18	22
Golf	18	13	18	15	23	19
Health and fitness	15	16	17	23	19	18
Religion	12	16	19	11	15	17
Rocks/geology	23	20	22	19	23	16
Boating	11	7	8	21	8	13
Gambling	12	10	10	10	11	13
Water sports	9	7	7	17	7	13
Hunting	9	6	5	18	3	11
Computers	9	10	8	17	6	10
Movies	8	7	10	10	7	9
Snow skiing	5	4	6	17	3	9
Star gazing	11	9	10	21	7	9
Collecting	18	9	10	8	7	8

X. Summary and Conclusions

Between October, 1995 and September, 1996, a survey of visitors to Globe-Miami was conducted by the University of Arizona Cooperative Extension. During that period, approximately 260,000 people visited the area. They spent approximately \$13.6 million. This spending resulted in \$21.2 million in total sales revenue impacts in the community and 634 full-time and part-time jobs. Tax revenues generated through visitor spending added over \$1.4 million to state and local government revenues. The Cities of Globe and Miami received just under \$350,000, Gila County received nearly \$325,000 and the State of Arizona received \$732,000 in tax revenue as a result of visitor spending.

Tourism is an avenue for economic diversification. There is also an important opportunity here to turn visitors to Globe-Miami into ambassadors for the area's mining, agriculture and natural resource based industries. Survey results show that visitors want to learn more about mining and ranching. An interpretive display at the reclamation/ revegetation project in Claypool, for example, has tremendous potential for educating the urban public on mining and ranching as well as becoming an ecological tourist attraction for the community.

The Globe-Miami area is rich in historical, cultural and natural resources. The community offers interesting shopping and dining opportunities. Globe-Miami has a tremendous location advantage over other rural Arizona communities. It lies on U.S. 60/70, one of the state's major east-west highways. It is within a two hour drive of both Tucson and the Phoenix valley. It is the principal gateway to the White Mountain recreation areas. With the addition of three new hotels (with 175 rooms) and the Apache Gold Casino and Resort during 1996, it is expected that tourist activities and impacts will continue to grow.

Globe-Miami appears to be in the midst of a major rediscovery. Things are happening. A Chamber of Commerce Tourism Authority has been formed, with impressive initial results. It is an opportune time for the community to come together to set direction for tourism development in the Globe-Miami area.

This study provides information on visitor demographics that should be helpful to local decision makers in assessing different directions and developing a tourism strategy that benefits the community. When survey results are compared with national trends, the following conclusions might be drawn:

Conclusion #1: All tourists are not the same. Globe-Miami should target high value customers.

Survey results show that certain visitors contribute more to the local economy than others. Survey results show that one-thirds of all tourist expenditures in the Globe-Miami community is made by just 16 percent of the visitors. These "big spenders" stay in Globe on average three times longer than other visitors and spend five times as much. The average "big spender" spends \$111 per person per day in the community compared to only \$22 per person per day for the average day visitor. Globe may wish to target its tourism development and marketing program to such high value customers.

Compared to the average visitor these "big spenders" are more likely to:

- stay over night;
- spend less time in the community (1.4 days) than visitors interested in outdoor recreation (2.9 days) and other overnight visitors (1.7 days);
- visit downtown Globe, local antique and specialty shops and to engage in shopping;
- be collectors (of antiques, art, rocks and minerals, quilts);

- attend local festivals;
- be 40 to 60 years of age;
- be of medium income (\$30,000-\$60,000); and
- make return visits to the community. They had been to Globe-Miami 7.5 times over the past two years compared to 4.6 times for the average visitor. Since most people learn about Globe-Miami by word of mouth. These “big spenders” can become tremendous ambassadors for the community.

Other research conducted in Arizona indicates that high value tourism segments include:

- History enthusiasts.
- Foreign visitors.
- Bird watchers.
- Agricultural tourists.
- Visitors who demand unique, authentic, life enriching experiences

Conclusion #2: Visitor expenditures occur largely in the community where the visitor spends the night. Getting visitors to stay overnight through the packaging of overnight visitor experiences provides an opportunity to significantly increase the economic impact of tourism on the Globe-Miami community.

Approximately 73 percent of the current visitors to Globe-Miami are day trip visitors. Most are in the community for four hours or less. While day trippers represent three-fourths of all visitors, they ac-

count for only 34 percent of total visitor expenditures. It is important to note that 69 percent of the visitors to Globe-Miami are spending at least one night away from home during their trip, but less than 30 percent are choosing to stay in Globe.

The average **overnight** visitor spent \$311 per party per trip in the Globe area, whereas the average **day tripper** spent \$65. The average daily expenditure of an overnight visitor is over two times that of a day tripper. Lodging alone accounts for 27 percent of all visitor expenditures, and where people stay overnight is also where they tend to eat breakfast and dinner, engage in evening activities and shop. Whereas overnight visitors spend \$69 in restaurants and \$31 on other food items, day trippers only spend \$17 on food. Also, overnights are more likely to purchase gasoline in the community, spending three and a half times as much on fuel as day trip visitors on a per person per day basis. In short, the longer visitors stay in the community, the more they spend.

Compared to day trippers, overnight visitors are more likely to:

- be younger (under 60);
- have an interest in wild-life and bird watching;
- visit Roosevelt Lake, the Tonto National Monument and National Forest areas;
- be from out-of-state;
- have a higher than average household income;

- have friends and family in Globe-Miami;
- be in the cities of Globe-Miami between 3-9 p.m.; and
- be looking for evening activities.

Day trip visitors also benefit the community. While their spending is significantly less than for overnight visitors, a larger portion (65 percent) of the total spending done by day trip visitors is for retail items. Twenty-eight percent engage in shopping; 14 percent come to buy antiques and a similar number come to buy/see art. Over half of all day trippers are 60 years of age or older, and are typically of lower income. The Boyce Thompson Arboretum is significantly more popular with day trip than overnight visitors. One-fifth of the day trip visitors indicate they are “just passing through the area” on their way to somewhere else.

Conclusion #3: Visitors are taking more frequent, shorter vacations, closer to home. Globe-Miami has an opportunity to provide overnight get-aways for Phoenix and Tucson residents.

Nationwide, short vacations presently account for 80 percent of vacation travel. Average length of trip is two to four days, often including a weekend. Average distance traveled is 75 to 100 miles. Thirty-eight percent of the current overnight visitors to Globe-Miami

and 47 percent of its day trip visitors are from Arizona.

Conclusion #4: Visitors are coming to Globe-Miami for a variety of reasons. This diversity provides for a stronger, more stable tourist economy.

Tourists report the reasons they are visiting Globe-Miami include:

- sight-seeing; seeing a mining town in operation;
- relaxation;
- visiting historic and pre-historic sites;
- visiting museums;
- shopping;
- outdoor recreation;
- wildlife and bird watching;
- Native American culture;
- eating in local restaurants;
- art;
- festivals and special events;
- rock hounding;
- boating and water sports;
- hunting; and
- gambling.

The most popular local attractions are: historic downtown Globe, Roosevelt Lake, Besh-Ba-Gowah and the Tonto National Monument.

Visitor responses indicate that certain businesses are emerging as significant visitor attractions in their own right. These include antique shops, unique lodging facilities, certain eating establishments, art, quilt supply, rock and mineral and other specialty shops. These establishments are frequently mentioned in very positive

terms by visitors, with many indicating these businesses are the main reason for their trip to the area. Globe-Miami must continue to develop such "local treasures" to be competitive with other tourist communities.

Over a quarter of all visitor expenditures in Globe-Miami are for retail items. Forty-one percent of all visitors purchased souvenir and gift items. The average expenditure per visitor to Globe-Miami is a phenomenal \$52 per trip, despite the fact that most visitors are on day trips. This is higher than what has been found in other rural Arizona communities, and may be attributable to the quality of shopping opportunities in the community.

In short, Southern Gila County is not a one attraction region. In contrast to many tourist communities where most visitors are there for one purpose, e.g., to view the site of an historic gunfight or to stay overnight before entering the Grand Canyon, people are coming to the Globe-Miami region for a number of different reasons. This diversity provides for a stronger, more stable tourist market.

Conclusion #5: The Roosevelt/Tonto visitor is an important component of the Globe-Miami Region tourist market.

Fifty-six percent of all visitors surveyed through this study are visitors to Roosevelt Lake

and the Tonto National Monument. These two attractions are strong draws for visitors to the area. These visitors have the following characteristics:

- Most are day trippers, spending an average of .43 days in the Globe-Miami area.
- Their most popular activities are general sight-seeing, followed by walking/hiking.
- Twelve percent engage in bird watching.
- Only 10 percent camp or engage in fishing or a water sport.
- Sixty-five percent visit the Tonto National Monument.
- Only 23 percent go as far as downtown Globe.
- There is a large concentration of visitors from both the high and low end of the income scale.
- Visitors who come to the area specifically for outdoor recreation (camping, fishing, boating) tend to spend more time (an average of 2.9 days) but spend less money in the community (\$37 per day) than other visitors.

It is important to note that 45 percent of Globe-Miami's overnight visitors include Roosevelt Lake in their visit; 31 percent include the Tonto National Monument. Including a trip to Roosevelt Lake and the Tonto National Monument into the itinerary of Globe-Miami visitors is one way of extending their visit into an overnight.

Conclusion #6: Increasingly, today's visitors are experience seekers. They are no longer content to be mere sight-seers. Globe-Miami has many opportunities for developing experiential activities for visitors.

Today's travelers want unique, authentic, life enriching experiences. They want to be involved. They want to learn about things. "Education" is a key motivation in tourism today. Historic places are increasingly popular. "Ecological" vacations are the fastest growing travel segment, today. Outdoor and nature are hot. Unique, ethnic and gourmet food items are sought. Gardening is the nation's #1 past time. The Globe-Miami area has tremendous potential in responding to these market trends. Visitors are now coming to the area for such experiences.

Following is a profile of the interests of current overnight visitors. These interests indicate future market demand:

- 55 percent want to learn more about local history;
- 48 percent are hikers and outdoor enthusiasts;
- 42 percent are photographers;
- 34 percent are interested in music;
- 25 percent are art lovers;
- 40 percent are active readers;
- 34 percent are conservation oriented/ecotourists;
- 31 percent are gardeners, many with interests in desert plant materials and landscaping;

- 24 percent are interested in ethnic and gourmet eating/cooking;
- 21 percent would like to know more about local geology, rocks and minerals;
- 18 percent are in to health and fitness.

Conclusion #7: Aging baby boomers will drive the tourism market in the next decade.

The over 50 population accounts for 80 percent of all leisure travel in America today. The baby boomer generation is now graduating their children from high school and college. As they approach and pass 50, they will be focusing more on relaxation, travel and life enriching experiences, and will have the disposable income to do it. Tomorrow's senior citizens will differ from today's. More experiential activities will be demanded.

Almost half of all overnight visitors to Globe-Miami are in the 36 to 59 year age group, another quarter are 60 years of age or older. Children currently represent a very small percent of current overnight visitors.

Conclusion #8: The "Old West" is very popular with foreign visitors.

German/European visitors are particularly interested in the Old West. They are looking for "real" western experi-

ences. Six percent of the current visitors to Globe-Miami are from Europe and Canada. More important, 10 percent of Globe-Miami's overnight visitor parties include members who are foreign citizens.

There is an opportunity in Gila County to develop farm/ranch recreation by inviting paying guests on to area ranches. Working ranches have a strong attraction to both domestic and international visitors.

Conclusion #9: Intra-state promotion provides Globe-Miami its greatest opportunity for expanding visitors to the community.

Close to half of the current visitors to Globe-Miami are Arizona residents. An additional 14 percent are Phoenix area winter visitors. Fifty-six percent of the overnight visitors and 64 percent of the day trip visitors indicate that the destination of their trip is Phoenix or another Arizona location. Most out-of-state visitors make their decision to visit Globe-Miami after they arrive in Arizona. Thus, the promotion of Globe-Miami in local and in-state media is an effective strategy for attracting both residents and out-of-state visitors to the community.

Less than 10 percent of all visitors indicate they first learned about Globe-Miami through a newspaper or magazine article. This is already changing as the community has begun an aggressive promotional

campaign targeted to the Tucson and Phoenix market.

Over 20 percent of present overnight visitors are in Globe-Miami to visit friends and family. Local residents should not be overlooked as important tourist ambassadors for the community. It is essential that local residents be kept abreast of visitor attractions and tourism development activities.

Guide books are also an effective way to reach prospective visitors. Twenty percent of current visitors indicate they first learned about the community through a guide book. Specialty guidebooks for birders, history enthusiasts, foreign visitors, etc. will receive increasing use.

Any promotional campaign should encourage overnight visitation, e.g., “Stay in (rather than visit) Historic Globe; Experience Arizona’s Golden Age.” The community needs to develop and substantiate the overnight appeal of Globe-Miami, and then effectively articulate it to others.

Conclusion #10: Tourism in Globe-Miami is currently seasonal in nature. Community promotion and special events should focus on the off season.

Over half (56 percent) of the visitors to Globe-Miami are coming during the winter months of January through May. \$1.38 million per month is spent in Globe-Miami by visitors during the peak win-

ter season. This drops to \$.95 million per month during the summer and fall seasons. Per person and per party expenditures by overnight visitors during the summer months equal expenditures during the peak winter months. Per person and per party expenditures by Roosevelt visitors actually increase in the summer and fall season. The problem is number of visitors.

The number of day trip visitors actually increase during the summer and fall season (3,500 per month) compared to the winter season (2,000 per month). Per person and per party expenditures by day trip visitor drop dramatically in the low season, however. This may be attributable to Roosevelt Lake visitors who include a trip into Globe-Miami during their stay.

Conclusion #11: Word-of-mouth is the primary way visitors find out about Globe-Miami. Customer service is key to keeping and attracting visitors.

Close to half of the visitors to Globe-Miami indicate they learned about the community from family and friends and word-of-mouth contacts. Globe-Miami has the opportunity to convert current day trip visitors into return overnight visitors through customer service. Every effort should be made to turn current visitors into community ambassadors for tourism development.

The average visitor to the Globe-Miami area has been to

Globe four or five times before in the previous two years. These repeat visitors should be utilized as ambassadors for the community.

Motel managers indicate that 50-80 percent of their current occupancy is overnight pass-through traffic, and business travelers. There is an opportunity to extend their stay in the community for leisure purposes or to encourage a return trip with other family members. The availability of information about local attractions and activities in local lodging places should not be overlooked.

Visitors indicate that what they like most about Globe-Miami is the friendly people and the small town feeling. They also like the history of the place, the mining town feel, the climate and the quiet, peacefulness of the community. They are also complimentary of the service they received at the Chamber of Commerce and the Tonto National Monument information centers.

Once they reach the community, visitors indicate they prefer to receive their information through written materials, talking with others and interpretive displays.

Suggestions for improving customer service include:

- better maps of the area (the Chamber has created and distributed regional and Globe-Miami maps in the community (see Figure 1 and Appendix D);
- better directional signage;

- mining overview and interpretation;
- more and cleaner public restrooms;
- later store hours;
- community clean-up;
- photo spots, i.e., where to get the best picture;
- improve decor at local motels;
- offer unique merchandise/souvenirs in retail stores, more variety and improve appearance of displays and buildings;
- cleaner restrooms, improve decor and offer segregated smoking areas in local restaurants;
- increase availability of unique souvenirs for sale at local attractions.

Visitors are pleased with the service received, cleanliness of lodging, eating and retail establishments, and the quality of local attractions. Foremost, visitors feel that they get value for their money.

In conclusion, it is a particularly exciting time for the Globe-Miami community. Business and community leaders have an opportunity to come together and strategically

set the direction of tourism in the community. Whether Globe-Miami becomes an overnight destination or only a place that people pass through on their way to somewhere else is largely the choice of local civic and business leaders. Likewise, the promotion of local attractions is not enough. The tourism relationship must result in transactions at the cash register if the community is to benefit. This requires the development and maintenance of quality attractions and visitor-oriented businesses.

Appendix A. Survey Methodology

The results presented in this report are from a mail survey of visitors to Globe. Surveys were distributed at local attractions, lodging, restaurants and retail shops. Local merchants, staff at attractions, and a local research associate distributed the surveys to visitors on randomly selected days. Of the approximately 1,965 surveys distributed, 923 were returned. The overall response rate was approximately 47 percent. A copy of the survey instrument follows in Appendix B.

The estimates of overnight visitors is based on occupancy rates, break outs between commercial and leisure travelers, and total room numbers supplied by a number of region hotels. These numbers were used to estimate total number of room nights. Survey data on the average number of people per overnight party were used to estimate total visitors. Average expenditures on a per person basis were used along with the visitor numbers to estimate total expenditures by visitors. The total expenditure estimate for the room nights located in the

City of Globe during the study were compared to the estimated hotel revenues from the five percent hotel tax collected by the city during this period. The two estimates were found to be within five percent of each other.

The estimates of Roosevelt and Tonto visitors is based on visitor counts at both locations and on information from the survey concerning what percent of these tourists visited both locations. Roosevelt visitor numbers were used as a base, then the percent of Tonto visitors that did not visit Roosevelt times total Tonto National Monument visitor numbers were added to the Roosevelt numbers. Both the Tonto National Forest Visitor Center and Tonto National Monument have good systems in place for estimating visitor numbers. However, the Tonto National Forest/Roosevelt Lake numbers do not include people coming to recreate at Roosevelt who did not stop at the visitor center.

Estimating day trip visitors to Globe-Miami was much more difficult, and the numbers pre-

sented are less reliable than for the other two categories. Visitor count data were available from the Chamber visitor center, Cobre Center for the Arts and Besh-Ba-Gowah. We subtracted out that portion of leisure visitors who stayed overnight and Roosevelt visitors who indicated that they stopped at the Chamber visitor center from total visitor center numbers. We then divided the remaining number of visitors to the Chamber by the percent of day trip visitors who indicated that they had visited the Chamber visitor center. The total Chamber visitor center numbers were too low in the shoulder season to account for all the overnight and Roosevelt visitors who indicated that they stopped there. To correct this, we assumed that the share of total visitor center numbers attributed to day trip visitors in the other two seasons, was the same as for the shoulder season. The Chamber visitor center has installed a door counter and future estimates of visitor numbers are expected to be more comprehensive and accurate.



GLOBE-MIAMI AREA VISITOR SURVEY

Thank you for agreeing to complete this survey. We have designed the survey to take approximately 10 minutes of your time to complete. The responses that you provide will help businesses and citizens in the Globe-Miami area improve the services and goods that they offer to visitors. Please mail this survey form to us in the attached business return envelope or leave it with the person who gave it to you.

1. In what city, state and/or country is your home? _____ zip code _____
2. If you have taken up temporary residence in Arizona, how many months do you plan to be in Arizona?
3. As you left your home on this trip, what communities or areas were to be your main destinations?
4. What were the main reasons you visited the Globe-Miami area during this trip? (Rank your top three, using 1 to indicate the most important, 2 to indicate the second most important and 3 to indicate the third most important)
 - _____ To visit historical sites or museums _____ Business or work related
 - _____ Just passing through the area _____ To visit friends and family
 - _____ Outdoor recreation- hiking, camping, etc. _____ To follow the Old West Highway
 - _____ To visit Besh-Ba-Gowah _____ To visit the Cobre Valley Center for the Arts
 - _____ To go to the Apache Gold Casino _____ To visit Roosevelt Lake
 - _____ To visit Tonto National Monument _____ To visit Boyce Thompson Arboretum
 - _____ On our way to the White Mountains _____ To raft the Salt River Canyon
 - _____ To learn about American Indians _____ To attend a festival or event
 - _____ Other, please specify: _____

5. What were the main leisure activities that you engaged in during your stay in the Globe-Miami area? (check all that apply)
 - general sight seeing visiting historical areas visiting museums
 - shopping attending festivals/events looking at/buying art
 - buying antiques 4 wheeling hiking/walking/jogging
 - boating/rafting swimming/water sports bicycling
 - wildlife/bird watching golfing horseback riding
 - rock hounding star gazing picture taking
 - fishing hunting camping
 - picnicking other, please specify: _____
6. Which of the following modes of transportation did you use during this trip? (check all that apply)
 - own car rental car own RV rental RV
 - airplane tour bus train bicycle
 - other, please describe: _____

7. How much time did you spend in the Globe-Miami area on this trip? _____ hours OR _____ days
 How many nights did you stay in the Globe-Miami area on this trip? _____ nights
8. During which times of the day were you physically in the Cities of Globe or Miami? (check all that apply):
 - all day
 - early morning (4 a.m. to 7 a.m.)
 - morning (7 a.m. to 10 a.m.)
 - late morning (10 a.m. to noon)
 - early afternoon (noon to 3 p.m.)
 - late afternoon (3 p.m. to 6 p.m.)
 - early evening (6 p.m. to 9 p.m.)
 - night time (9 p.m. to 4 a.m.)
9. How many total nights have you spent away from home during this trip? _____ nights
10. How many total visits (including this one) have you made to Globe-Miami in the past two years? _____ trips
11. Do you plan to return to the Globe-Miami area? no yes
 Please share your reasons: _____

12. What local sites have you visited during your stay? (check all that apply)
 - Cobre Valley Center for the Arts Gila County Historical Museum
 - Besh-Ba-Gowah Apache Gold Casino
 - Roosevelt Lake Historic downtown Globe-Miami
 - Globe-Miami Chamber of Commerce Tonto National Monument
 - Boyce Thompson Arboretum Antique and specialty shops
 - National Forest/Wilderness area San Carlos Apache Cultural Center
 - San Carlos Lake Old West Sheriff's Museum
 - other, please specify: _____

13. Please indicate the number of members of the party you are traveling with that can be described as follows:
 - a. _____ total number in party e. _____ friends
 - b. _____ spouse or significant other f. _____ tour group members
 - c. _____ own children g. _____ business associates
 - d. _____ other relatives h. _____ other, please specify: _____

14. How many people in your party are:
 - 17 years of age or younger? _____
 - 18 to 35 years of age? _____
 - 36 to 59 years of age? _____
 - 60 years of age or older? _____

15. Please estimate your expenditures in the Globe-Miami area in U.S. dollars.
 - These expenditures are for _____ (number of) people.
 - a. lodging/accommodations \$ _____
 - b. restaurant food \$ _____
 - c. groceries \$ _____
 - d. gas \$ _____
 - e. other purchases \$ _____

- What types of other purchases did you make? (check all that apply):
- entrance fees, licenses, donations crafts
 - books art
 - apparel toiletries- toothpaste, etc.
 - souvenirs- postcards, trinkets, etc.
 - other, please specify: _____

16. Was there anything that you wanted to buy or do in the Globe-Miami area that you could not find or do?
 - no yes. If yes, describe: _____

Local businesses would like to have your suggestions as to what they or the community can do to better serve your needs.

17. Please rate your experience in local lodging/campgrounds (circle the appropriate choice):

	excellent	very good	good	fair	poor
Choice/variety of facilities	5	4	3	2	1
Cleanliness	5	4	3	2	1
Decor/furnishings	5	4	3	2	1
Heating/cooling	5	4	3	2	1
Noise level	5	4	3	2	1
Service	5	4	3	2	1
Value (quality for amount paid)	5	4	3	2	1

18. If you did not receive this survey at your place of lodging, can you please tell us where you stayed? _____

19. How would you rate local restaurants? (circle the appropriate choice)

	excellent	very good	good	fair	poor
Choice/variety of food	5	4	3	2	1
Cleanliness	5	4	3	2	1
Service	5	4	3	2	1
Decor	5	4	3	2	1
Value (quality for amount paid)	5	4	3	2	1
Hours/days of operation	5	4	3	2	1
Restrooms	5	4	3	2	1
Noise level	5	4	3	2	1
Segregated smoking area	5	4	3	2	1

20. Are these ratings for a specific restaurant? no yes. If yes, which one: _____

21. How would you rate local retail shops in the Globe-Miami area? (circle the appropriate choice)

	excellent	very good	good	fair	poor
Choice/variety of merchandise	5	4	3	2	1
Cleanliness	5	4	3	2	1
Appearance of displays	5	4	3	2	1
Appearance of building	5	4	3	2	1
Service	5	4	3	2	1
Value (quality for amount paid)	5	4	3	2	1

22. Are these ratings for a specific shop? no yes, if yes, which shop: _____

23. How would you rate any of the local attractions:

	excellent	very good	good	fair	poor
Quality of displays/views	5	4	3	2	1
Entertainment value	5	4	3	2	1
Cleanliness (include restrooms)	5	4	3	2	1
Maintenance of attraction	5	4	3	2	1
Service	5	4	3	2	1
Accessibility (ease of locating)	5	4	3	2	1
Parking	5	4	3	2	1
Hours/days of operation	5	4	3	2	1
Availability of unique gifts	5	4	3	2	1

24. Are these ratings for a specific attraction? no yes, if yes, which attraction: _____

25. What did you like best about the Globe-Miami area? (check all that apply)

<input type="checkbox"/> small town feeling	<input type="checkbox"/> cleanliness	<input type="checkbox"/> quiet, peaceful place
<input type="checkbox"/> friendly people	<input type="checkbox"/> mining town feel	<input type="checkbox"/> the history of the place
<input type="checkbox"/> the scenery	<input type="checkbox"/> the climate	

other, please describe: _____

26. What suggestions do you have for improving the Globe-Miami area? (check all that apply)

<input type="checkbox"/> improve road signs	<input type="checkbox"/> provide maps to the area
<input type="checkbox"/> keep stores open later	<input type="checkbox"/> clean up town
<input type="checkbox"/> provide more parking	<input type="checkbox"/> improve how businesses treat customers
<input type="checkbox"/> provide better access to viewpoints	<input type="checkbox"/> provide more picnic areas
<input type="checkbox"/> provide better access to places to observe mining	<input type="checkbox"/> provide more restrooms

other, please describe: _____

27. How did you first learn about Globe-Miami? (check all that apply)

<input type="checkbox"/> through friends or family	<input type="checkbox"/> through newspaper ads
<input type="checkbox"/> through a travel agent	<input type="checkbox"/> through a magazine; other, please describe: _____
<input type="checkbox"/> through roadside signs	<input type="checkbox"/> through a guide book
<input type="checkbox"/> through a newspaper article	<input type="checkbox"/> don't remember or are not sure
<input type="checkbox"/> through a brochure	<input type="checkbox"/> other, please describe: _____

28. Which of the following information sources did you use during your visit to the Globe-Miami area: (check all that apply)

<input type="checkbox"/> brochures, newsletters	<input type="checkbox"/> maps
<input type="checkbox"/> books, guides	<input type="checkbox"/> video tapes
<input type="checkbox"/> computer programs	<input type="checkbox"/> displays at visitor center
<input type="checkbox"/> staff at visitor center	<input type="checkbox"/> tours or interpretive programs
<input type="checkbox"/> audio tapes	<input type="checkbox"/> other, please describe: _____

29. Which of the following ways of providing information would you prefer? (check all that apply)

<input type="checkbox"/> written material	<input type="checkbox"/> staff to talk to
<input type="checkbox"/> video or computer program	<input type="checkbox"/> audio programs on cassette
<input type="checkbox"/> activities I can do myself	<input type="checkbox"/> talk/lecture/slide show
<input type="checkbox"/> self-explained exhibits	<input type="checkbox"/> other, please describe: _____

30. Which terms best describe the interests of members of your party: (check all that apply)

<input type="checkbox"/> history buff	<input type="checkbox"/> video game fan
<input type="checkbox"/> antique collector	<input type="checkbox"/> shopper
<input type="checkbox"/> rock hound, amateur geologist	<input type="checkbox"/> outdoors person- hiker, camper, climber
<input type="checkbox"/> conservationist, nature or eco tourist	<input type="checkbox"/> golfer
<input type="checkbox"/> angler/fishing	<input type="checkbox"/> hunter
<input type="checkbox"/> gourmet, cooking or eating	<input type="checkbox"/> book lover
<input type="checkbox"/> water sports enthusiast	<input type="checkbox"/> music lover
<input type="checkbox"/> boating enthusiast	<input type="checkbox"/> movie aficionado
<input type="checkbox"/> team sports enthusiast	<input type="checkbox"/> religions
<input type="checkbox"/> skier, snow	<input type="checkbox"/> craftsperson or artist
<input type="checkbox"/> flight friend- pilot, skydiver, hang glider	<input type="checkbox"/> like to gamble
<input type="checkbox"/> photographer	<input type="checkbox"/> star gazer, amateur astronomer
<input type="checkbox"/> computer enthusiast/ hacker	<input type="checkbox"/> horseman or woman
<input type="checkbox"/> collector of: _____	<input type="checkbox"/> gardener, flower lover
<input type="checkbox"/> health & fitness enthusiast	<input type="checkbox"/> other: _____

31. Check the category that best describes your family's before tax income:

_____ a. less than \$15,000	_____ e. \$60,001-80,000
_____ b. \$15,001-30,000	_____ f. \$80,001-100,000
_____ c. \$30,001-40,000	_____ g. over \$100,000
_____ d. \$40,001-60,000	

32. Would you describe members of your party as: (check all that apply)

<input type="checkbox"/> White	<input type="checkbox"/> Asian or Pacific Islander	<input type="checkbox"/> American Indian
<input type="checkbox"/> African American	<input type="checkbox"/> Hispanic	<input type="checkbox"/> Other

33. Are there international visitors in your party? no yes. If yes, from where: _____

34. Was the person or people who completed this survey _____ male _____ female _____ both.

Thank you very much for participating in this survey!

Appendix C. Summary Tables

Table C1. Origin of Visitor Parties
(percent)

	Overnight	Day Trip	Roosevelt	Total
Arizona	37%	47%	48%	45%
West except Arizona	26	18	17	20
South	11	6	8	8
Central	13	16	14	14
East	7	8	7	7
International	7	5	6	6

Table C2. Destination of Other Globe-Miami Area Visitor Parties
(percent)

	Overnight	Day Trip	Roosevelt	Total
Phoenix	21%	28%	21%	23%
Globe-Miami	24	19	16	19
Roosevelt/Tonto	6	3	16	11
White Mountains/ Mogollon Rim	7	9	11	10
Other Arizona	22	23	22	22

Table C3. Primary Reason for Visit to Area
(percent)

	Overnight	Day Trip	Roosevelt	Total
Passing through	15%	19%	15%	16%
Visit Roosevelt Lake	7	4	24	15
Visit Tonto National Monument	6	4	23	14
Visit friends and family	21	5	8	11
Visit other local attractions/events	10	19	6	10
Business or work related	15	6	7	9
Visit historical sites or museums	7	11	5	7
Visit Besh-Ba-Gowah	2	15	0	4
Outdoor recreation	6	2	3	4
Other	12	16	8	11

Table C4. Activities on this Trip
(percent)

	Overnight	Day Trip	Roosevelt	Total
General sight-seeing	72%	68%	81%	75%
Visit historic areas	55	51	55	54
Take photographs	32	21	39	33
Visit museums	32	35	23	28
Shopping	31	28	15	22
Hike/walk/job	21	7	24	19
Picnic	10	6	15	12
Buy antiques	19	14	3	10
Wildlife/bird watch	12	6	12	10
Camp	13	4	10	9
Buy/see art	14	14	3	8
Attend festivals/events	10	9	1	6
Fish	7	2	6	5
Rock hound	7	3	3	4
Star gaze	10	1	3	4
Swim/water sports	6	0	4	4
Boating	5	0	3	3

Table C5. Attractions Visited on this Trip
(percent)

	Overnight	Day Trip	Roosevelt	Total
Roosevelt Lake	45%	30%	82%	59%
Tonto National Monument	31	18	65	44
Historic Downtown Globe-Miami	48	42	23	35
Besh-Ba-Gowah	36	44	16	28
National forest/wilderness area	27	10	29	24
Antique and specialty shops	27	29	9	19
Boyce Thompson Arboretum	15	24	15	17
Globe-Miami Chamber Visitor Center	19	19	10	15
Apache Gold Casino	15	11	9	11
Cobre Valley Center for the Arts	15	14	1	8
San Carlos Lake	9	6	8	7
Gila County Historical Museum	12	9	3	7
San Carlos Apache Cultural Center	6	2	2	3
Old West Sheriff's Museum	3	3	2	2
Other	13	13	7	10

Table C6. Age Distribution of Visitors
(percent)

	Overnight	Day Trip	Roosevelt	Total
Under 18	8%	4%	7%	7%
18-35 years	19	5	12	13
36-59 years	48	41	41	43
60 and over	24	50	39	37

Table C7. Interests of Visitor Parties
(percent)

	Overnight	Day Trip	Roosevelt	Total
History	55%	59%	49%	54%
Outdoors- hiking, camping, climbing	48	44	59	53
Photography	42	36	53	44
Books	40	46	43	43
Shopping	36	42	35	39
Music	34	31	33	33
Gardening	31	33	31	32
Conservation/ecotourism	34	26	30	31
Crafts/art	25	36	21	27
Antiques	29	37	16	25
Gourmet food	24	19	21	24
Fishing	19	13	21	22
Golf	13	16	21	19
Health and fitness	18	13	22	18
Religion	13	20	18	17
Rocks/geology	21	17	13	16
Boating	11	7	19	13
Water sports	12	6	15	13
Gaming/gambling	11	13	11	13
Hunting	10	6	11	11
Computers	10	11	13	10
Skiing	10	7	11	9
Movies	8	8	9	9
Star gazing/astronomy	12	6	9	9
Collections	11	10	6	8
Team sports	4	4	9	7
Riding horses	8	7	4	6
Video games	2	3	6	5

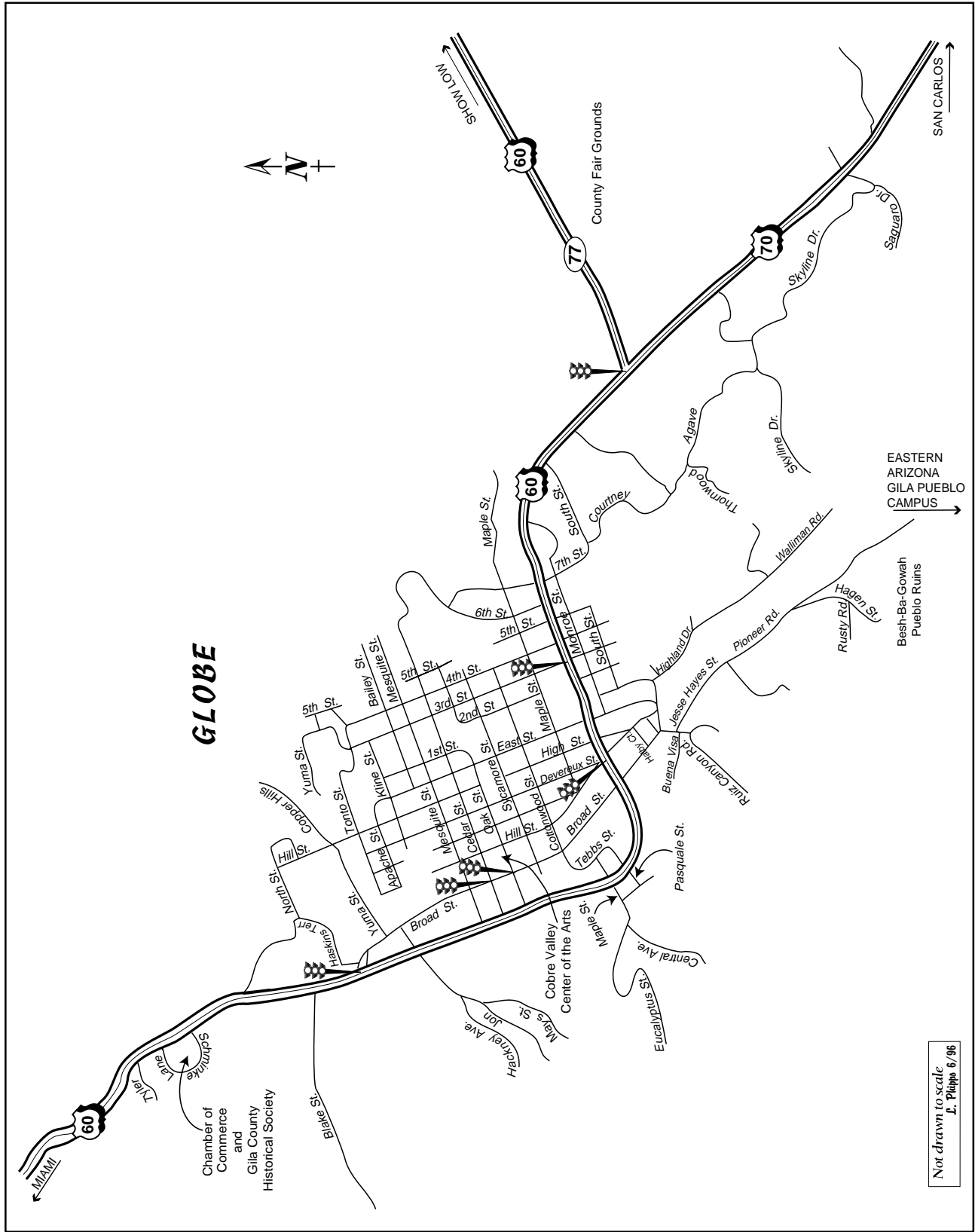
Table C8. Modes of Transportation of Visitor Parties During this Trip
(percent)

	Overnight	Day Trip	Roosevelt	Total
Own car	63%	73%	67%	68%
Rental car	22	20	22	22
Airplane	12	8	6	8
Own RV	7	6	9	7
Other	16	4	5	8

Table C9. Household Income Distribution of Visitor Parties
(percent of all visitor parties)

	Overnight	Day Trip	Roosevelt	Total
\$15,000 or less	3%	6%	3%	4%
\$15,001-\$30,000	17	21	22	20
\$30,001-\$40,000	14	16	14	14
\$40,001-\$60,000	30	29	24	27
\$60,001-\$80,000	17	15	17	17
\$80,001-\$100,000	11	7	9	9
Over \$100,000	9	5	10	9

Appendix D. Globe-Miami Maps



Not drawn to scale
L. Phillips 6/96

