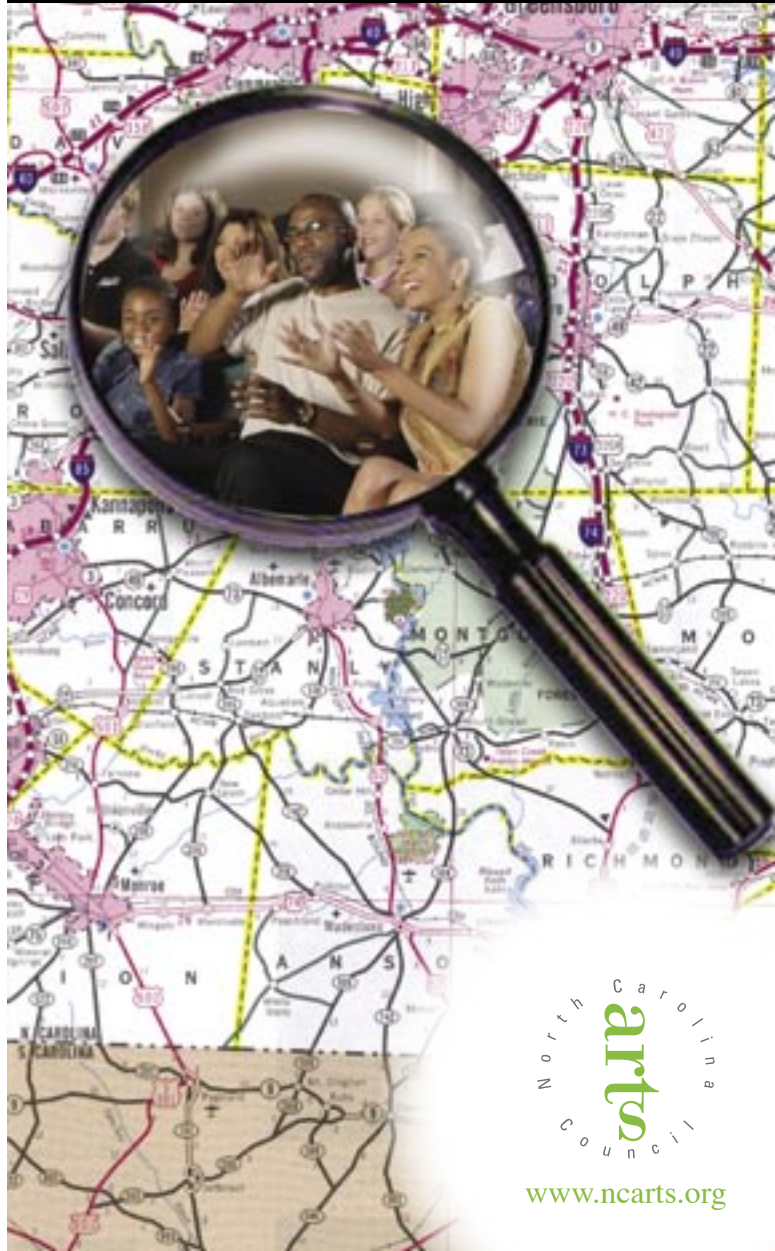


The Artful TRAVELER

Cultural Tourism in North Carolina



www.ncarts.org



www.ncarts.org

North Carolina Arts Council
Department of Cultural Resources
Raleigh, NC 27699-4632

“Oh, Won’t You Stay, Just a Little Bit Longer?”

THE REVIEWS ARE IN!

North Carolina’s cultural travelers far exceed the national average of dollars spent per day per traveler.¹ According to the comprehensive study, “The Artful Traveler: Cultural Tourism in the State of North Carolina,” cultural tourists have figured out that there is an art to traveling.

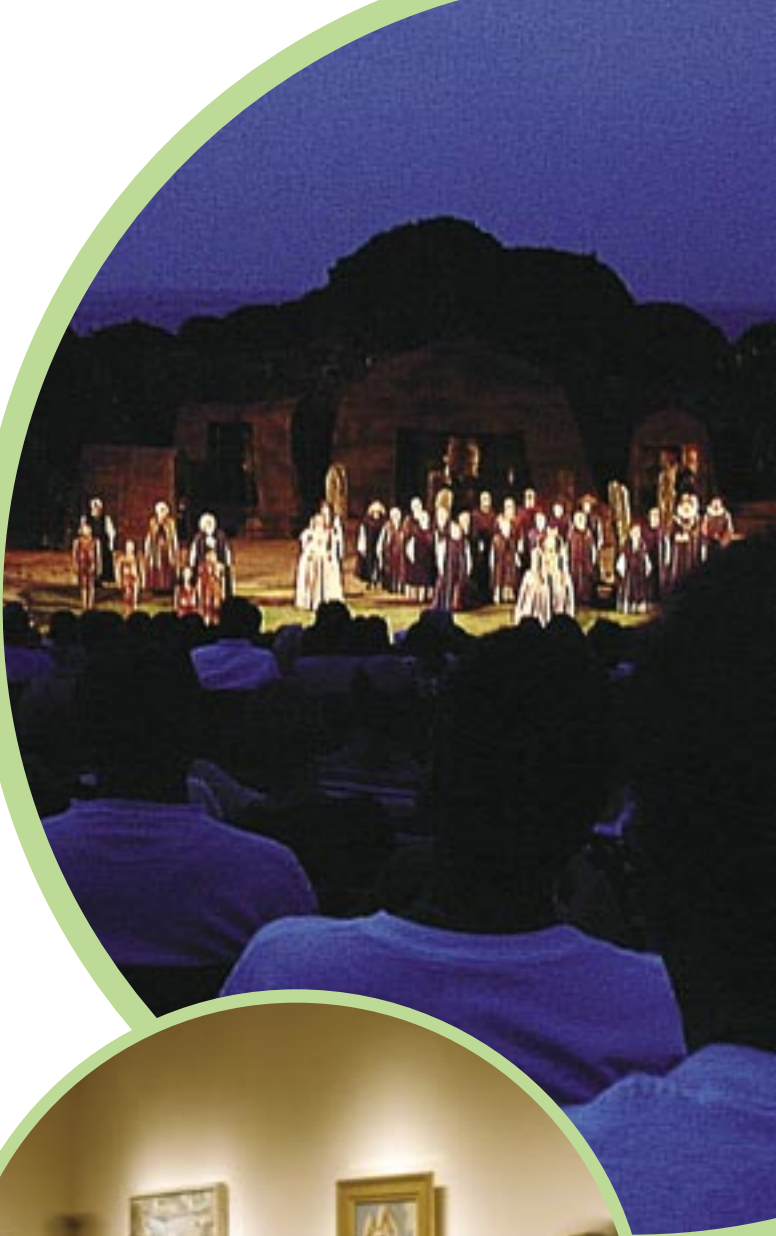
Appalachian State University looked at North Carolina tourists’ travel patterns, state of origin, age, education level, and income. The findings of the study, the first of its kind ever conducted here, tell us that these travelers select their destinations based on arts and culture, are highly educated, and ready to spend money!

“THE JOURNEY OF 1,000 MILES...”

As the old proverb goes, “a journey of 1,000 miles begins with a single step.” Study authors Dr. Michael Evans and Dr. Dinesh Davé say, “We assume that North Carolina is fairly typical of cultural tourism destinations across the total U.S.”² Yet, the study reports “cultural travelers do not spend as many nights in North Carolina as they do in other places.”³ In North Carolina, cultural tourists spend, on average, one night on a trip compared to general North Carolina travelers, who spend on average 2.3 nights per trip.⁴ Nationally, cultural and heritage travelers stay an average of 4 days, compared to an average of 3.2 days for the average tourist.⁵

“North Carolina’s mix of contemporary art, craft, Blue Ridge music, theater, dance, Cherokee heritage and literary traditions makes for one-of-a-kind memories for travelers, whether they come from far away or just up the road.”

— Mary B. Regan,
Executive Director North Carolina Arts Council



Cultural Tourism Builds Memories... and Local Economies

When cultural tourists spend the night, they become “artful lodgers,” who put a new twist on tourism. Compared to all travelers, those who participate in cultural events pump more money into an area’s economy. In North Carolina, that comes to \$102.28 spent per person, per day.⁶ This is nearly one third more than the national average of cultural and heritage travelers of \$70.80,⁷ and nearly twice the \$59.83 per day spending of North Carolina’s general traveler.⁸

Cultural tourism remains the fastest growth segment of the industry, up 13 percent in volume since 1996 and 17 percent in spending.⁹ 81% of all travelers stop at a museum, take in a concert, or find other ways to enjoy the arts.¹⁰



In 2003, North Carolina was named one of the top 10 states in cultural and heritage tourism by the Travel Industry of America (TIA) and *Smithsonian Magazine*,¹¹ underscoring the state’s national reputation as a must see destination for folks seeking the authentic. And Charlotte is one of the Top 10 urban destinations for African American travelers.¹²

As the ASU study notes, “Tourists come to beautiful destinations, but they want to be active and have something to experience.”¹³ The study goes on to say “the research suggests that the consumer motivation to travel is quite simple. They seem to want to learn something new and hope to enrich their lives through the cultural travel experiences.”¹⁴



Data Source	Reported Expenditure	No. of Nights	Travel Party	Per Capita Per Day
TIA – General Traveler	\$454.00	3.20	2.10	\$67.56
TIA – Cultural Traveler	\$623.00	4.00	2.20	\$70.80
NC General Traveler	\$289.00	2.30	2.10	\$59.83
NC Arts – ASU Study	\$374.35	1.00	3.66	\$102.28



Fast Facts

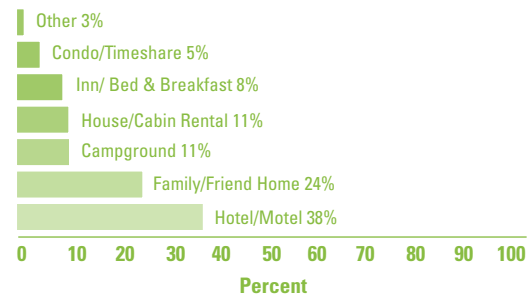
Cultural tourists' economic impact reaches beyond the purchase of a ticket – lodging, meals, and other cultural events. Here are some North Carolina fast facts:

- In North Carolina, nearly half of cultural tourists (48%)¹⁵ say that destination choice is influenced by activity. Nationally, the comparable figure is 3 out of 10.¹⁶
- 41% of travelers added an additional cultural event or activity on their trip.¹⁷
- One third of arts venues have more than 50% of their ticket purchasers come from out of town.¹⁸ Outdoor dramas have a 95% rate of travelers.¹⁹
- Lights, camera, spending! Weighted average spending on an arts event was \$102.28 per person.²⁰ Per person spending is even higher at film festivals and urban theaters.²¹
- 67% of those studied paid for lodging in motels, B&Bs, house rentals, or camping²²
- The “Artful Traveler” study reports that North Carolina’s cultural tourists are eclectic and educated.
 - Almost 2/3 (61%) of respondents have bachelor’s degrees or higher levels of education, compared to 22.5% of all North Carolinians.²³
 - Cultural tourists’ average age is squarely in the baby boomer range at 49.9 years.²⁴
 - Average income for cultural tourists in North Carolina is \$74,576,²⁵ more than twice the 2002 national average of \$30,906.²⁶

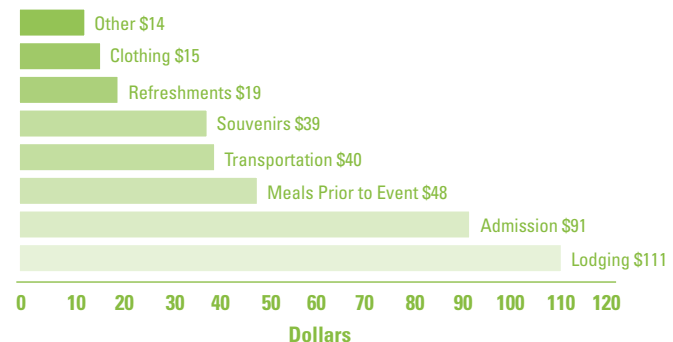
“Arts and humanities contribute to all aspects of social life and kindle an emerging creative economy fueled by the growth of cultural tourism in North Carolina.”

— Gov. Michael F. Easley
Arts and Humanities Month
Proclamation, October, 2003

TYPE OF LODGING USED BY N.C. CULTURAL TOURIST



TYPICAL N.C. ARTS EVENT SPENDING



“The two heavyweights of tourism in North Carolina are, in one corner, the cultural and heritage tourism traveler, and in the other corner the sports, outdoor, golf and NASCAR fan.”

— *ASU Study Authors*
Dinesh Davé and Michael Evans

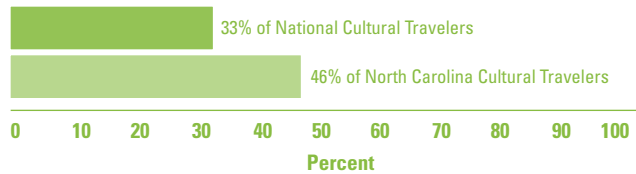


Making Artful Travelers Into Artful Lodgers

Up to 40 percent of tourism in North Carolina is cultural travel

Researchers Evans and Davé talk about the primary motivator for travel and say that heritage and cultural tourism may be as large as “40% of the leisure/tourism sector.”²⁷ They go on to say that “the two heavyweights of tourism in North Carolina are, in one corner, the cultural and heritage tourism traveler, and in the other corner is the sports, outdoor, golf and NASCAR fan.”²⁸

Percent of Cultural Travelers who earn over \$75,000



Cultural travelers in North Carolina spend three times as much as residents to attend arts events – \$374 vs. \$116.²⁹ The study is based on controlled sample surveys that include the arts spectrum. Data was collected at art museums, performing arts events, outdoor dramas, and arts/craft, film, and music festivals. The data sample was balanced on urban/rural and seasonal or year round organizations.

More than 2,700 consumers were interviewed. The study is the largest of its kind in the history of the state. The ASU study places the direct economic impact of the 15 organizations studied at \$77 million. According to a Travel and Tourism Congressional District Economic Impact Study,³⁰ \$55,000-\$65,000 in new visitor spending is worth one full-time job equivalent.



“Failure to recognize the need to invest public and private dollars in expanding cultural opportunities will ultimately have a negative impact on economic development.”

—Phillip J. Kirk, Jr.
President and Secretary
N.C. Citizens for Business and Industry



Why Do They Call It A Get-Away?

“I get letters every week from readers who tell me that they use my books as tour guides... (and) Seagrove potters tell me that tourists show up with copies of *Uncommon Clay* in hand and want them to autograph the page where they’re named.”

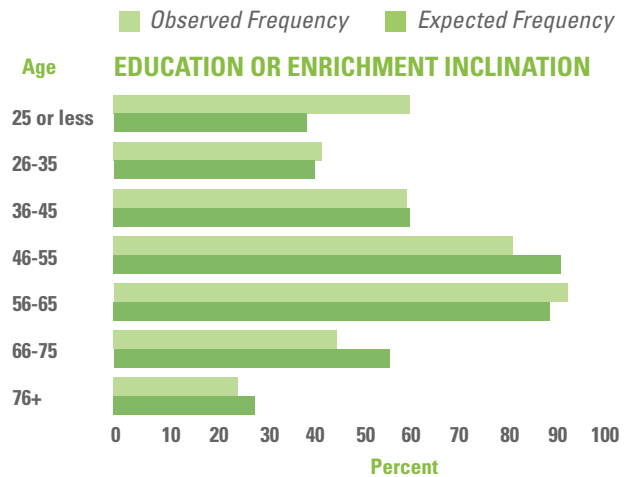
—North Carolina author Margaret Maron

Travel motivation varies a great deal by age, income, and education. For example, people under age 25 thrive on education and enrichment.³¹ A hands-on arts event that promotes self-expression has an even greater likelihood of attracting these young people. On the other hand, Baby Boomers want the arts to be “thought provoking,” “nostalgic,” and “good for the family.”³² Regardless of age or income, cultural travelers want the experience to be fun and relaxing.

It’s no secret that many cultural travelers eventually become residents of North Carolina. And, North Carolina’s population is booming. North Carolina experienced the third largest net relocation gain in the country in 2004, behind only Florida and Arizona.³³

“One of the reasons I moved here was because of the outstanding support and quality of the arts. North Carolina has the best of the best when it comes to art and artists.”

—Jody Cassell
New North Carolina Resident



“Across our great state, we have many cultural attractions distinct to North Carolina. From folk art and outdoor theater to symphonies and ballet, North Carolina’s diverse and thriving arts scene attracts visitors and plays a large role in the state’s flourishing tourism industry.”

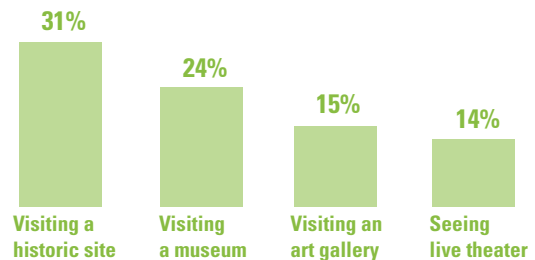
—North Carolina Senator, Elizabeth Dole



**PRIMARY PURPOSE OF TRIP
CULTURAL/HERITAGE TRAVELER**

	North Carolina ³⁴	National ³⁵
Specifically This Event	45%	NA
Vacation/Holiday/ Entertainment/ Sightseeing	25%	27%
Visit Family/Friend	19%	37%
Outdoor Recreation	1%	6%
Personal	1%	10%
Business/Convention	2%	7%
Combined Business/ Pleasure	3%	10%
Other	4%	3%

**81% OF ALL U.S. TRAVELERS ADD THE ARTS TO A TRIP.
MOST POPULAR ARE:³⁶**



The Next Chapter

STEPS TO TAKE

ASU researchers Evans and Davé say that North Carolina's challenge is to encourage the cultural traveler to stay longer and capture more tourist dollars. "A true marketing opportunity may be available to most arts organizations... by developing marketing partnerships and cooperative advertising with the tourism attractions in their region..."

Finally, tourism marketing organizations must consider how they position their cultural tourism attractions and ensure they receive the proper placements in all marketing efforts.³⁷ Other steps to increase participation in the arts while traveling include:

- Encourage local Tourism Development Authorities (TDAs) to fund product development in their communities – in addition to promoting what others create – the unique and authentic character of the community is highlighted and more readily shared.
- Attract cultural travelers through the strong use of graphics of the arts and of cultural activities on TDA home pages.
- Recognize that North Carolina's cultural travelers are highly educated, financially able, and 50% more likely to be women than men.³⁸
- Follow the recommendations of a new study by the Rand Corporation that urges that federal, state, and local policy be refocused to build demand for the arts by introducing more Americans to engaging arts experiences, especially when they are young.³⁹
- People want more time for themselves and their lifestyle, and will pay for conveniences that will make that happen.

NORTH CAROLINA A LEADER

North Carolina is a leader in cultural tourism in the U.S. In 2004, the North Carolina Arts Council was awarded the first-ever Preserve America Presidential Award for its work on the Blue Ridge Heritage Initiative, one of its many tourism endeavors. North Carolina is a leader in other ways. The Arts Council is part



of the Department of Cultural Resources, which was the first Cabinet level department for arts and culture in the nation. The Department and its divisions showcase North Carolina riches and its promise. Since 1999, participation in all programs funded through the North Carolina Arts Council alone has increased 47% from 8.5 million to 12.5 million.⁴⁰ That tells us that the potential market for cultural tourism is huge:

- The cultural traveler is inquisitive, and Internet "connections" are vital because frequent cultural/heritage travelers are much more likely to use the Internet than other travelers.
 - When arts venues link to local tourism authorities, busy consumers can more easily plan travel.
 - Previous research showed that nearly 75% of people who received material about summer performing arts in North Carolina traveled exclusively for the arts event.⁴¹
 - Opportunities for cultural and heritage tourism abound.
 - "Hands-on experiences" are key traveler motivators, such as arts weekends, music and dance venues, and craft retreats.
 - Travelers want to save time and money: 64% want all-inclusive vacations such as farm stays that meet that demand.⁴²
 - 70% believe life is too complicated, 70% say stress reduction is important reason to travel.⁴³
- The conclusion: North Carolina's authenticity is an antidote.

NORTH CAROLINA CULTURE ONLINE

www.NCArts.org: The North Carolina Arts Council Web site is a “one-stop shop” for the arts. It features a comprehensive events calendar, leads visitors to exciting arts experiences, connects to 2,400 arts organizations in North Carolina, and highlights the business of the arts – funding resources, news, and trends.

www.HomegrownHandmade.com: Art Roads and Farm Trails. Self-directed driving trails through rural N.C.

www.NCDCR.gov: The Department of Cultural Resources Web site is a portal to state historic sites, history museums, the Symphony, the Art Museum, historic preservation, genealogy, arts, and libraries.

www.DiscoverCraftNC.org: Find out about the Celebration of North Carolina Craft, and where to learn about, see, and buy traditional and contemporary craft.

www.BlueRidgeMusic.org: This music trail points out 200 places in Virginia and North Carolina to go tap your foot or shake your leg.

www.CherokeeHeritageTrails.org: This site connects with the rich and living culture of the Eastern band of the Cherokee.

www.NCCultureTour.org: Fourteen centers devoted to our rich African American culture and traditions in visual arts, music, and dance.

www.NCECHO.org: ECHO, Exploring Cultural Heritage Online, is a doorway to the special collections of libraries, archives, museums, historic sites, and other cultural institutions.

PHOTO CREDITS

On the Cover: Patrons enjoy a show at the North Carolina Blumenthal Performing Arts Center. Page 3: (top) Performance of “The Lost Colony” (photo by Guy Albertelli), (bottom) patrons at the North Carolina Museum of Art. Page 4: International Festival, Fayetteville. Page 5: Maestro Grant Llewellyn conducts the North Carolina Symphony (photo by Michael Virkle). Pages 6-7: (l-r) Brooch by Penland School of Crafts artist Jamie Bennett, teapot by Penland student Julie Elkins, project from first-ever neon class at Penland. Pages 8-9: Dancers Ben Kubie and Traci Gilchrist in North Carolina Dance Theatre’s production of “MAP” choreographed by Alonzo King (photo by Rolland Elliott). Page 11: Thomas Wolfe Memorial (photo by Georgann Eubanks). Page 12: Painting workshop participant at Roanoke Island Festival Park, co-sponsored by the Dare County Arts Council. Page 13: Square dancers at the annual Bluff Mountain Festival, Hot Springs, N.C. (photo by Cedric N. Chatterley) Page 14: (top) Thomas Sayre’s sculpture “Gyre” on the grounds of the North Carolina Museum of Art, (bottom) Morehead City Fish Walk. Page 15: Flat Rock Playhouse’s production of “Spider’s Web” (photo by treadshots.com). Page 17: President George W. Bush and First Lady Laura Bush present North Carolina Arts Council Executive Director Mary B. Regan and North Carolina Arts Council Folklife Director H. Wayne Martin with the first ever Preserve America Presidential Award for Heritage Tourism in honor of the Arts Council’s work with the Blue Ridge Heritage Initiative. Page 18: Busy day at ArtsPlosure street fair in downtown Raleigh.

PUBLIC VALUE OF THE ARTS

The arts add tremendous value to the life of the state of North Carolina and to its people.

VIBRANT COMMUNITIES

- Active Citizenship
- Access to Variety of Experiences
- Attractive and Distinctive Spaces
- Authenticity and a Sense of Heritage
- Safe Public Gathering Places

PRODUCTIVE NORTH CAROLINIANS

- Healthy Economy
- Skilled, High Performing Workforce
- Lifelong Learning
- Quality Education
- Opportunity to Excel
- Healthy Minds and Bodies

A FREE AND DEMOCRATIC SOCIETY

- Individual Creative Expression
- Our Cultural Legacy
- Cross-Cultural Understanding & Connection to a Wider World
- Public Accountability
- Pursuit of Happiness

In Fiscal Year 03-04, 12.5 million people participated in programs funded through the North Carolina Arts Council.

The North Carolina Arts Council works to make North Carolina a better state through the arts. A division of the Department of Cultural Resources, the Arts Council celebrates those who create and enjoy art in all 100 counties.

- 1 “The Artful Traveler: Cultural Tourism in the State of North Carolina,” John A. Walker College of Business, Appalachian State University, 2005.
- 2 *ibid.*
- 3 *ibid.*
- 4 North Carolina Division of Tourism, “2004 Impact of Tourism in North Carolina”
- 5 Travel Industry of America, 2003
- 6 “The Artful Traveler: Cultural Tourism in the State of North Carolina,” John A. Walker College of Business, Appalachian State University, 2005.
- 7 Travel Industry of America, 2003
- 8 North Carolina Division of Tourism, 2003
- 9 Travel Industry of America/Smithsonian Magazine study, 2003
- 10 *ibid.*
- 11 *ibid.*
- 12 Travel Industry of America study, 2004
- 13 “The Artful Traveler: Cultural Tourism in the State of North Carolina,” John A. Walker College of Business, Appalachian State University, 2005.
- 14 *ibid.*
- 15 *ibid.*
- 16 Travel Industry of America study, 2003
- 17 Travel Industry of America
- 18 “The Artful Traveler: Cultural Tourism in the State of North Carolina,” John A. Walker College of Business, Appalachian State University, 2005.
- 19 *ibid.*
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- 21 *ibid.*
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- 26 U.S. Bureau of Economic Analysis, “BEARFACTS” report, 2002.
- 27 “The Artful Traveler: Cultural Tourism in the State of North Carolina,” John A. Walker College of Business, Appalachian State University, 2005.
- 28 *ibid.*
- 29 *ibid.*
- 30 “Travel and Tourism” Congressional District Economic Impact Study
- 31 “The Artful Traveler: Cultural Tourism in the State of North Carolina,” John A. Walker College of Business, Appalachian State University, 2005.
- 32 *ibid.*
- 33 Annual Allied Van Lines Magnet States Report, 2004
- 34 “The Artful Traveler: Cultural Tourism in the State of North Carolina,” John A. Walker College of Business, Appalachian State University, 2005.
- 35 Historic Cultural Traveler, 2003 copyright TIA
- 36 *ibid.*
- 37 “The Artful Traveler: Cultural Tourism in the State of North Carolina,” John A. Walker College of Business, Appalachian State University, 2005.
- 38 *ibid.*
- 39 Rand Corporation report, 2005
- 40 North Carolina Arts Council final report, 2004.
- 41 Summer Performing Arts Coalition/N.C. State University report, 2002
- 42 Yesawich, Pepperdine, Brown, and Russell: Peter Yesawich at 2005 North Carolina Governor’s Conference on Tourism
- 43 *ibid.*

METHODOLOGY

Survey instrument was distributed throughout 2003 and 2004 to approximately 2,720 arts patrons at venues ranging from art museums, performing arts events, outdoor dramas, and arts/craft, film, and music festivals. The data sample was balanced on urban/rural and seasonal or year round organizations. The data was used to estimate the direct economic impact of cultural tourists in North Carolina. For additional statistics and information on this study, visit www.ncarts.org.

The study was funded by the North Carolina Arts Council.

8,000 copies of this brochure were printed at a cost of 34 cents each in June, 2005

The North Carolina Arts Council is a division of the Department of Cultural Resources. For more information about the Department, visit www.ncdcr.gov.

Michael F. Easley, Governor
Lisbeth C. Evans, Secretary, Department of Cultural Resources
Margaret S. Newman, Chair, North Carolina Arts Council
Mary B. Regan, Executive Director, North Carolina Arts Council

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