

## **Kansas Cultural and Heritage Research Study Executive Summary**

### **Study Objectives**

The objectives of this study were to conduct scientific research to acquire and assess qualitative and quantitative data regarding regional artisan and cultural heritage products tourism to increase cultural and heritage tourism for the state of Kansas. The Kansas Department of Commerce, Travel and Tourism Division (KDCTTD) retained Randall Travel Marketing, Inc. (RTM) of Mooresville, North Carolina to conduct this study.

### **Statement of Methodology**

Research for this project was conducted for the Kansas Department of Commerce, Travel and Tourism Development Division during the period of October 2005 through December 2006. Many methods of data collection were used as part of this research project. This project includes the following major elements:

#### **Phase I - Current and Potential Market Analysis**

- Initial stakeholder meeting held to gather input - October 2005
- Summary of previous research developed
- Reconnaissance and Mystery Shopping (art, craft, heritage and cultural sites)
  - October 18 - 25, 2005
  - 156 Arts/crafts/heritage/cultural sites visited
    - North Central Kansas 14
    - South Central Kansas 19
    - Northeast Kansas 74
    - Southeast Kansas 16
    - Northwest Kansas 22
    - Southwest Kansas 11
- Initial report to stakeholders - December 15, 2005

#### **Phase II - Economic Impact Data Gathering and Analysis**

- Heritage Attraction Manager Survey – 34 completed
- Art and Craft Gallery Manager Survey – 11 completed
- Visitor Intercept Survey – 753 completed
  - Visitor profile and behavior data gathered
  - Distributed throughout Kansas at 76 intercept points
  - 753 visitor surveys completed as of October 31, 2006
  - Data analyzed and compared to national data

#### **Phase III - Final Report Development**

- Final report presentation - December 7, 2006

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### **Summary of Previous Research**

This section of the study is a summary of existing research. The sources for each are listed.

#### **Kansas Population and Workforce**

- The population of Kansas is growing slowly (1.7% since 2000) with most growth occurring among minority groups. The vast majority of Kansas residents are found east of Wichita.
- Racial Diversity - 86% white, 7% Hispanic, 6% African-American, 1% is Native American
- Median age is down slightly from 35.2 to 34.7. Age 35 – 54 = 28% of the population seventeen and under = 25%; Age 18 – 34 = 24%; 55 – 74 account for only 16% of the population.
- Household income has increased from \$27,291 in 1990 to \$44,338 in 2004.
- Net Migration has been consistently negative since 1999 and the most recent figure (2002) is -10,379. This shows that population growth is coming from births while some adults tend to move away from the state thus keeping the overall population growth low.

#### **Kansas Traveler Profile (TIA) - 2002**

- Domestic Travelers spent \$3.7 billion (1.6% increase over 2001)
- Kansas ranked 38<sup>th</sup> in domestic travel expenditures among all 50 states
- 55,000 jobs, \$881.8 million in payroll supported by domestic travel
- \$293.3 million in federal taxes generated by domestic travelers
- \$213.5 million in state taxes generated by domestic travelers
- \$54.2 million in local taxes generated by domestic travelers
- \$434.9 million in lodging revenues statewide from domestic travelers

#### **Kansas Artist and Craft Persons Survey – 2005**

- 4,603 mailed, 513 returned, 11.14% response rate
- 59.5% described their work as fine art, 33.7% described their work as craft, 15.4% described their work as folk/traditional art, 4.2% were galleries or art centers
- Art disciplines listed most often include two-dimensional 206 (40.2%), three dimensional 105 (20.5%), Fiber 85 (16.6%), Wood 71 (13.8%) and Ceramic 71 (13.8%)
- 54% opened their business since 1990
- 86% market themselves, 34% place work in galleries, 52% place work on consignment
- 70% of respondents report less than \$5,000 in annual income from art sales
- 53% report that they can increase their production in the future
- 65% are willing to sell their work in a Kansas arts destination retail store
- 90% are willing to provide live demonstrations of their work

#### **Kansas Artisan Food Producers Survey – 2005**

- 527 mailed, 173 returned, 32.8% response rate
- 66.5% opened their business since 1990
- 1,280 products produced with mostly fruits/berries, condiments, bakery items and meat products
- 89.6% retailers, 78.6% wholesalers, 29.5% do private labeling
- 24% offer u-pick crops, 42% offer tours, 24% offer agritourism events
- 62% can increase their production
- 76% are willing to sell their work in a Kansas destination retail store
- 76% are willing to provide live demonstrations of their work
- 67% are interested in a statewide farmers market if it is conveniently located

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### **Summary of Cultural Heritage Tourism Trends**

- Defined as “traveling to experience the places, activities and artifacts that tell the stories of the people, past and present,” cultural heritage tourism is increasingly recognized as an important economic driver for destinations around the world:
- Globally, one of the fastest growing industry segments in travel & tourism with predictions to increase by 30% by 2010<sup>1</sup>
- In America, historic and cultural travel volume grew 13% from 1996 to 2002<sup>2</sup>
- 81% of all traveling American adults – 118 million – engaged in a cultural or heritage activity in 2002<sup>3</sup>

Why? Cultural heritage travelers spend more, stay longer and are not dependent on seasonality for time of visit. In addition, these visitors focus on the authentic aspects of a destination – historic, cultural, natural assets that define a place – as the key experiences. Therefore, destinations do not have to invent, recreate or manufacture attractions. Instead, the focus is on telling fact-based stories in uniquely, engaging and informative ways. Cultural heritage travelers also desire interaction with locals, are more inclined to purchase locally-made items and value “items or experiences they can’t get at home.”<sup>4</sup>

What cultural heritage travelers’ want:

- Facility open when they travel (including weekends, evenings)
- Facility easy to locate: good signage, well-marked and inviting entrances
- Safe place to eat, shop, tour, sleep
- Desire for nostalgia, patriotism, education
  - Authentic quality experiences shared by/with knowledgeable, friendly LOCAL hosts:
  - Appeal to the five senses
  - Cater to specific audience needs
  - Provide a unique perspective - your “point of difference”
  - Relate past to the present
  - Tap local “culture” – music, entertainment, storytelling, cuisine – to enhance experience
  - Stories told with integrity

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<sup>1</sup> World Tourism Organization, 2001

<sup>2</sup> Travel Industry Association of America (TIA), Historic/Cultural Tourism Study, 2003

<sup>3</sup> TIA 2003

<sup>4</sup> TIA 2003

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### **Summary of Cultural and Heritage Reconnaissance**

Randall Travel Marketing professionals visited Kansas and conducted reconnaissance of a sampling of typical Kansas art, craft, heritage and cultural product offerings. The dates of this visitation were October 18, 2006 through October 26, 2006. The destinations were fully evaluated from the perspective of the tourist.

The RTM team visited one hundred fifty-six (156) arts, crafts, heritage and cultural attractions and sites throughout the state of Kansas. For ease in interpretation, this report reflects the division of the State of Kansas into six regions; Northwest, Southwest, North Central, South Central, Northeast and Southeast.

<b>Kansas Region</b>	<b>Number of Attractions Visited</b>
Northwest Region	<b>22</b>
Southwest Region	<b>11</b>
North Central Region	<b>14</b>
South Central Region	<b>19</b>
Northeast Region	<b>74</b>
Southeast Region	<b>16</b>

- Interstates 70, 135, and 35 should be considered “rivers of opportunity” that provide effective customer access and delivery. However, there must be compelling signage and effective marketing in the state travel guide and other pieces to lure travelers off the highway.
- Signage and wayfinding for heritage sites is good in Kansas overall. This is especially true for the western regions.
- There is often significant distance from one heritage site to another. Thus, those particularly interested in heritage sites must drive long distances. Due to this, heritage sites are well served by partnering with whatever nearby tourism products and amenities that may exist. The overall experience at most heritage sites is good and is typical of what one normally finds in such sites. In other words, they are not necessarily better or worse than heritage sites in other states. They are typical.
- One of the single most noted failings of Kansas heritage sites was the poor performance in providing visitors with an initial orientation and helping facilitate their visit. Often our team found that while guests were greeted warmly, they were not given a suitable brief orientation to the site or instructed how to enjoy their visit. Better orientation and facilitation is definitely needed.
- Heritage sites would benefit from including a display in their gift shop specifically marked “Made in Kansas” and showcasing items made in Kansas by Kansans.
- The state travel guide is the most dominant marketing tool for these heritage sites. It is readily found throughout the state.

### **Summary of Reconnaissance for Craft Retailers**

- As with heritage sites (above) Interstates 70, 35, and 135 should be considered “rivers of opportunity” that provides very effective customer access and delivery. However, there must be compelling signage and effective marketing in the state travel guide and other pieces to lure travelers off the highway.
- The quality of art and craft available in Kansas is outstanding. One finds a full range from “home” crafts to fine art in all regions of the state. The quality of product is comparable with other states and destinations.
- Many fine art craft retailers have good displays featuring the various artists. However, again, there is little that features any exclusivity for “Made in Kansas” items.

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- The state travel guide is a good marketing tool for these retailers. There are so few listed that the likelihood of their being noticed is good.
- There does not appear to be any linkage between art and craft retailers. One seldom finds information at retailers that promotes visiting other places of interest for craft and art.

### **Summary of Art and Craft Gallery Manager Survey**

This survey gathered data regarding visitor profiles and visitation patterns as well as information on overall product features and offerings. A total of eleven (11) art and craft gallery managers completed and returned a survey questionnaire.

- Art and craft galleries growth/decline over past three years:
  - Galleries with growth over past three years 27.00%
  - Galleries with decreased business over past three years 18.00%
  - Galleries with stable business over past three years 9.00%
  - No response 46.00%
- Art and craft galleries typical visitor parties:
  - Adults only 50.00%
  - Families 28.00%
  - School groups 4.50%
  - Motorcoach 3.50%
  - Events 11.00%
  - Other 3.00%
- Art and craft galleries visitor points of origin:
  - Local regional residents 54.00%
  - Visitors that live beyond 1 hour drive 46.00%
  - Out-of-state origin: Interstates 70, 135, 30 corridors
- Art and craft galleries overall average sale per customer: \$51.42
- Typical answer for average sale per customer \$40.00
- Percentage of art and craft galleries opened since 1990 55.00%
- Percentage of art and craft galleries opened from 1976-1990 45.00%
- Percentage of art and craft galleries with products for sale that are:
  - At least 98% of inventory is handmade or original art/craft 72.00%
  - One half (50%) of inventory is handmade or original art/craft 18.00%
  - One quarter (25%) of inventory is handmade or original art/craft 10.00%
- Percentage of Kansas grown, Kansas produced or Kansas made products:
  - Galleries with at least 98% Kansas grown, produced or made art/craft 36.00%
  - Galleries with at least 50% Kansas grown, produced or made art/craft 28.00%
  - Galleries with less than 25% Kansas grown, produced or made art/craft 36.00%
- Galleries with special tags on products that indicate "Made in Kansas":
  - Galleries where All "Made in Kansas products have special tags 9.00%
  - Galleries where some "Made in Kansas" products have special tags 36.00%
  - None of the "Made in Kansas" products have special tags 36.00%
  - If tags were available, percent of galleries that will use them 45.00%
- Percentage of galleries with special sections for "Made in Kansas" products:
  - Insufficient response to be definitive.

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- Percentage of galleries that sell Kansas souvenirs 18.00%
  - Top selling souvenir items: (insufficient response to be definitive )
- Types of art and craft offered at galleries surveyed:
  - Baskets, food, glass jewelry, music, paintings, photography, pottery, sculptures, wheat and straw items,
  - wood items, furniture, metal items, musical instruments, paper print making, quilts, fiber, holiday ornaments, leather items, clothing, dolls, Native American items and soaps.

### Summary of Heritage Attraction Manager Survey

This survey gathered data regarding visitor profiles and visitation patterns as well as information on overall product features and offerings. A total of thirty-four (34) heritage attraction managers completed and returned the survey questionnaire.

- Overall five year attendance for Kansas Heritage Attractions:
  - Attendance numbers up 41.00%
  - Attendance numbers down 35.00%
  - Attendance numbers stable 21.00%
  - Numbers too new 3.00%
- Overall typical visitor parties:
  - Seniors 24.00%
  - Adults only 26.00%
  - Families 24.00%
  - Children without parents 4.00%
  - School 15.00%
  - Motorcoach 3.50%
  - Events 3.50%
- Overall visitor point of origins:
  - Local regional residents 42.00%
  - Visitors beyond 1-hour drive 58.00%
- Overall average typical visit: 1.5 hours
- Overall average number of staff:
  - Full-time employees 5.25
  - Part-time employees 7.88
  - Volunteer help 30.85
- Kansas heritage attractions opened since 1990: 41.00%
- Kansas heritage attractions opened or renovated since 1990: 100.00%
- Overall features of Attractions:
  - Guided tour 41.25%
  - Orientation film 35.00%
  - Interpreters in period dress 26.50%
  - Self guided tour brochures 53.00%
  - Audio self guided tours 6.00%
  - Hourly guided tours 12.00%
  - Twice daily guided tours 3.00%
  - Guided tours on demand 44.00%
  - Guided individual tours 32.00%
  - Pre-scheduled tour groups 73.50%
  - Daily living history demos 6.00%
  - Gift shop 85.00%
  - Visual exhibits 68.00%
  - Automated interpretation 23.50%
  - After hours interpretation 15.00%
- Of the 85% of attractions that have a gift shop:
  - Percentage of products are made in Kansas 16.25%
  - All of the "Made in Kansas" products have special tags 15.00%
  - Some of the "Made in Kansas" products have special tags 38.00%
  - None of the "Made in Kansas" products have special tags 26.50%
  - Gift shops with special section for "Made in Kansas" products 18.00%
  - If "Special section" "Made in Kansas" signs available, would you use? 53.00%
- Heritage attractions that provide food service: 56.00%
- Attractions overall type of food service:
  - Restaurant style 15.00%

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- Snack bar 3.00%
  - Vending machines 15.00%
  - Catering 26.00%
  - Snacks/sodas-gift shop 9.00%
  - No food available 41.00%
  - Heritage attractions that charge admission: 59.00%
  - Heritage attractions that do not charge admission: 41.00%
  - Overall average admission:
    - Seniors \$ 4.70
    - Adults \$ 5.83
    - Students \$ 3.55
    - Average age free 5 &-Under
    - Children \$ 1.60
  - Average visitor spending at attractions: \$ 15.00
    - No spending 35.00%
    - \$10 and under 26.00%
    - \$10 - \$15 18.00%
    - \$15 - \$25 15.00%
    - Over \$25 6.00%
  - Attractions open year round: 79.00%
  - Attractions that vary hours of operation in low season: 44.00%
  - Attractions that close January, February and March: 21.00%
  - Attractions open on Saturday 100.00%
  - Attractions open on Sunday 91.00%
  - Attractions open on Monday 59.00%
  - Attractions with budget \$50,000 or less 29.00%
  - Attractions with budgets \$50,000-\$100,000 21.00%
  - Attractions with budgets \$100,000-\$250,000 21.00%
  - Attractions with budgets \$250,000-\$750,000 17.00%
  - Attractions with budgets \$750,000-3,000,000 4.00%
  - Attractions with budgets over \$3,000,000 8.00%
- Attractions are marketing as follows:

Attractions Marketing	%
Brochure	91.00%
Website	91.00%
Sign at sign	85.00%
Kansas DOT signage	65.00%
E-marketing	23.50%
Billboards	47.00%
Consumer trade shows	35.00%
Brochures placed at Kansas	82.00%
TravelKS.com	62.00%
Site listing in State of Kansas	82.00%
Print Ad - Kansas Travel Guide	26.50%
Paid Print Ad - In State	50.00%
Paid TV Ad - In State	15.00%
Paid Radio Ad - In State	26.50%
Paid Print Ad - Out of State	26.50%
Paid TV Ad - Out of State	0.00%
Paid Radio Ad - Out of State	9.00%
Feature Print Story - In State	65.00%
Feature TV/Radio Story - In State	50.00%

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- Trends were reported by each attraction and tend to reflect national trends in overall visitor behavior.

### Summary of Visitor Survey Responses

Survey Questions	Summary of 2006 Visitor Survey Responses
Number of completed surveys	753
Locations- where surveys distributed	76
Visitor points of origin	<b>Interstates 70, 135, 35 corridors:</b> Kansas-34%, Missouri-11.5%, Colorado-7.5%, Texas-5.6%, California -4.8%, Oklahoma-3.5%, Nebraska-2.9%, Illinois-2.5%, Arkansas, Ohio, Florida Washington, Indiana, Arizona, Pennsylvania, New York, Wisconsin, Michigan, New Mexico, Iowa, North Carolina, Minnesota, South Dakota, Wyoming, Idaho Tennessee, Massachusetts, Kentucky, Louisiana, New Jersey, Idaho, District of Columbia, Utah, Virginia, Alabama, Hawaii, West Virginia and Nevada
Average total nights for entire trip	6.19
Average total nights in Kansas	2.83
Have you visited Kansas before?	First trip = 17.43% / <b>repeat trip = 82.57%</b>
Average number of previous trips	Leisure visitor = 3 / business visitor = 2.75
Major trip purpose	Visiting friends/relatives = 42%, leisure = 41%, overnight/part of a longer trip = 21%, day trip = 15%, business = 14%, meeting/convention = 3.5%
Lodging type	Hotel/motel = 39%, friends/family = 29%, none = 12.5%, RV park/campground = 8%, Bed and Breakfast Inn = 6%
<b>Average daily spending</b>	<b>\$261.66</b>
Average daily spending-daytrippers	\$175.77
Average daily spending-stay in lodging	\$267.65
Average age	52 years old
Gender	Male=37% / female=63%
Occupation	Retired, teacher, homemaker, mid-level professional, student, business owner, medical, sales, high-level professional, office staff, government
Travel party	<b>79% adults only = 2.25 (av. adults) / 21% adults with kids = 2.52 (av. kids)</b>
Months visited	Spring, Summer, Fall
Liked most about Kansas	Friendly people, scenery, road conditions, family and friends, food and restaurants, museums, everything, variety of attractions, weather, clean, historic sites, small charming town atmosphere, prices- good value, accommodations, no traffic, shopping, art galleries, rest areas, Agriculture Hall of Fame, quiet, antiques, Eisenhower Center, Welcome/visitor center Grassroots Arts Center, zoo, history, winery, Cabella's, Dodge City, festival entertainment, open spaces, prairie, wheat fields, wildlife and Capitol
Liked least about Kansas	Weather, road signs lacking/confusing, road construction, nothing, gas prices, restaurants selection/quality, time poverty, flat land, smells, closed and limited attractions, insects, tolls, highway patrol, shopping hours and limited variety, welcome center information lacking, accommodations average, dust, Fred Phelps, rest stops, traffic, Wal-Mart, disrepair of houses/buildings, air travel to Kansas, no ocean, no trees, poor cell phone service, prices high, websites are difficult to find, 8% tax, Abilene closed
Overall average rating	<b>4.52</b>
Women - overall average rating	<b>4.57</b>
Men - overall average rating	<b>4.43</b>
Overall quality of heritage sites	<b>4.45</b>
Quality of art/craft for purchase	<b>4.25</b>
Ease of finding visitor information	<b>4.26</b>
Signage and wayfinding	<b>4.20</b>

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***Approximately how much will your party spend in Kansas buying art/craft during this trip?***

<b>Art/Craft Spending</b>	<b>Amount</b>
Most Frequent Response	\$150.00

### **Summary of Visitor Survey Responses Continued**

<b>Art and Craft Purchased</b>	<b>% of Respondents</b>
<b>Food and edibles (specialty items)</b>	<b>29.61%</b>
<b>Jewelry</b>	<b>17.66%</b>
<b>Soaps, lotions, candles, etc.</b>	<b>12.08%</b>
Other (specify)	12.08%
Photography	8.90%
Pottery, raku, ceramics, clay, etc.	8.50%
Glass	7.70%
Holiday ornaments/decorations	7.30%
Fiber and fabric, knit, crochet, etc.	7.17%
Music (local/native CDs, etc.)	6.91%
Clothing (hand made)	6.91%
Paintings and drawings	6.64%
Paper, printmaking, etc.	5.84%
Metal (wall hangings, garden items, etc.)	5.44%
Native-American/Tribal made items	4.78%
Wheat straw items	3.98%
Wood	3.85%
Ethnic (specify)	3.32%
Leather	2.26%
Sculpture	2.12%
Quilts	2.12%
Baskets	1.59%
Dolls	1.59%
Furniture (hand made or craft)	1.06%
Musical instruments	0.40%

<b>List of Activities</b>	<b>% of Responses</b>	<b>List of Activities</b>	<b>% of Responses</b>
<b>Dining at restaurants</b>	<b>66.53%</b>	Attend performance/concert	8.76%
<b>Visit a museum</b>	<b>66.27%</b>	Other (specify)	8.10%
<b>Shopping</b>	<b>56.71%</b>	Visit a botanical garden	7.44%
<b>Visit a historic site</b>	<b>52.46%</b>	Bird watching	6.51%
<b>Driving/sightseeing</b>	<b>52.32%</b>	Attend a sports event	6.11%
Visit Kansas friends/family	34.79%	Water sports	5.84%
Shop at art/craft gallery	32.80%	Boating/fishing	5.58%
Antique shopping	24.04%	Casinos/gaming	5.44%
Attend family event	22.31%	Convention/meeting	5.44%
Visit a state park	20.58%	Visit an amusement park	4.25%
Visit a zoo	15.01%	Genealogy	4.25%
Attend a festival	12.62%	Rodeos	3.85%
Business	11.82%	Golf	3.72%
Visit a winery/brewery	11.42%	Off road	3.45%

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Hiking/cycling	11.29%	Horseback riding	2.79%
Farm/ranch experiences	11.02%	Hunting	2.79%
Camping/RVing	10.89%	Motorsports	1.33%
Military history	9.43%		

### Strategic Direction

Competition for the cultural heritage traveler – the educated, high-income visitor that spends more and stays longer – is growing, domestically and internationally. For Kansas destinations to compete with other places focusing on heritage and craft, the state must foster growth and sustainability of exceptional, authentic experiences and products. The stories of Kansas must be presented in engaging, informative ways that make history relevant to today’s visitor.

The following points are the primary considerations for accomplishing growth:

- Understand the current profile of visitors to Kansas.
- Make sure existing customers find information that leads them to statewide sites and cash registers in order to generate greater economic impact immediately.
- Implement strategies that will grow targeted customer segments.
- Educate retail, heritage, and arts/craft community – help them understand the current visitor behavior patterns, needs and expectations. Further, help them translate this data into enhanced experiences at heritage sites.
- Increase the quality and diversity of locally-made crafts available for sale.
- Monitor visitor satisfaction and spending.

A key deliverable of tourism is “**spending by visitors for local and state benefit**”. Kansas has an excellent opportunity to increase the revenues generated through visitor spending while not overburdening its infrastructure.

**The following key areas impact the growth of cultural heritage tourism in Kansas, and the state’s ability to increase retail sales of locally-made items.**

#### Local Education (Raising Awareness):

- Increase museum/heritage site and craft community’s awareness and understanding of visitor needs/desires to foster greater collaboration and integration.

#### Product Development:

- Develop and encourage retail opportunities for Kansas artisans (at museum stores, in locally designated areas of galleries and shops, at wholesale marts, shows and special events).
- Enhance the interpretation and visitor experiences at local heritage sites, attractions and communities.
- Increase the quality and diversity of locally-made crafts available for sale.

#### Visitor Orientation and Facilitation (Visitor Centers and Signage):

- Better orientation and facilitation is needed at state and local visitor centers to entice travelers to get off of the major interstates and help them “find the good stuff” they naturally seek.
- This includes showcasing crafts and heritage sites with dynamic displays and compelling visuals.

#### Marketing:

- Continue to rely upon the state travel guide and Internet website as the primary marketing tools, in conjunction with the state welcome centers.

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- Encourage a “Kansas Prairie Art” website co-op for sales of craft and art. Link site to state tourism website.
- Encourage a marketing co-op titled “Within 5 Miles” to encourage those attractions and amenities within 5 miles of the interstate exits to participate in a co-marketing piece.
- Extend the “Made in Kansas” brand and ensure appropriate development, designation, marketing and delivery of quality, authentic products available for sale.
- Develop a “Heritage Kansas Experience” designation for heritage sites that complete a series of workshops designed to empower site and experience enhancement.

### **Education (Raising Awareness)**

The findings from the reconnaissance visits and other research activities reveal that many heritage attractions and retail/craft/artisan centers do not participate nor recognize their involvement in the tourism industry. In turn, the tourism industry is often unaware of or lacks understanding on how to work with the arts/heritage community. Education and pro-active communication are necessary to foster collaboration and stimulate partnerships between these two groups to create win-win results.

#### **1. Build Heritage/Cultural Partnerships with Tourism Industry**

- Encourage historic site managers and arts/cultural community leaders to participate in tourism industry activities, including the state’s annual conference.
- Include seminars on cultural heritage development and marketing at tourism industry events.
- Educate historic site managers on the “store, door and more” philosophy to cultivate earned income opportunities from visitors. The cultural/historic site manager must become salesperson as well as interpreter.

#### **2. Designate (or hire new) tourism industry staff person to coordinate all cultural heritage tourism activities**

- Represent the state at industry functions that focus on cultural heritage tourism education, awareness or networking (such as Cultural & Heritage Tourism Alliance annual meetings, Heritage Development Conference, National Preservation Conference, American Association of State & Local History, Museum Store Association annual conference, etc.)
- This person will also be responsible for coordinating and managing all interagency programs, or priority activities identified by the Kansas Cultural Heritage Tourism Advisory Committee (see below).

#### **3. Form a statewide Cultural Heritage Tourism Advisory Team**

RTM recognizes that the tourism office is not the sole state agency responsible for these activities. In fact, a Kansas Cultural Heritage Tourism Advisory Committee is needed to ensure participation in this initiative and tap interagency representatives from tourism, arts, humanities, historic preservation, transportation, economic development/commerce

- Ask each agency to appoint someone to participate in this team
- Convene this group to establish specific projects for group support

#### **4. Establish a Cultural/Heritage Site “Marketing Symposium” offering a certification for heritage site personnel who attend a series of cultural heritage tourism training workshops**

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- Host an annual multi-day “Marketing Symposium” on cultural heritage tourism “how-to” topics. If appropriate or necessary, secure funding for scholarships to ensure retail staff, artists, historic site managers and visitor center staff participation.
- Create and distribute an electronic newsletter about programs, trends, and practical tips for enhancing cultural heritage tourism. Use best practices from other states (see [www.culturalheritagetourism.org](http://www.culturalheritagetourism.org) for ideas) and extract information from national newsletters to inform local constituents about the cultural heritage visitor profile, segment, etc.
- Create a network of mentorship among graduates of the “Marketing Symposium” for targeting, enrolling, and assisting all heritage sites in understanding the behavior of the traveling public.

### **5. Create worksheet to assist heritage sites in attaining “store, door and more” philosophy**

- Create a Worksheet that provides tangible concepts and tips for putting this philosophy in action.
- Heritage sites and partners can use this to encourage establishing spending outlets, facility rentals, and add-on experiences that will create revenue streams and diversify revenue sources.

### **6. Continue to produce annual report on tourism results**

- RTM recommends including a focus on heritage and craft tourism in an annual tourism industry report be provided to statewide media. This annual report identifies the important statistics depicting the statewide travel and tourism industry including:
  - Tax relief generated by visitors to Kansas.
  - Visitor profile.
  - Rank order of activities.
  - Objectives of the KDCTTDD and their annual accomplishments.
  - Characteristics of heritage and craft visitors.
  - Residents can then read this and hopefully become better informed as to the importance of tourism to the state, as well as knowing what things are most appreciated by visitors to their town

### **7. Encourage cross-promotion and referrals by heritage sites**

- RTM was disappointed to find very little cross promotion at heritage sites throughout Kansas. The reconnaissance trip revealed a lack of cross-marketing among heritage sites and neighboring attractions. If a major goal of the state is to extend overnight visitation, expert referrals – guides and staff at heritage attractions, restaurants, retail shops – are important for educating and enticing cultural heritage visitors to stay longer and see more.
- To actively encourage cross promotion, RTM recommends that the State identify and recognize those who demonstrate that they actively promote their fellow attractions and amenities. Perhaps this recognition could come in the way of a free entrance fee to the state tourism conference, or some other tangible reward. It would certainly be good to include those identified in newsletters and other in-state industry communications.

## **Product Development**

Visitors enjoy the attractions and tourism products in Kansas. This is reflected in an overall satisfaction rating of 4.52 on a 1 – 5 scale where 1 equals low and 5 equals high. This is an excellent overall rating. However, travel and tourism trends reveal that the consumer is steadily

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becoming more sophisticated in their demands and tastes. Thus, it is necessary for the State of Kansas to continually look at how it can improve and enhance its tourism products.

RTM encourages the Kansas Department of Commerce – Travel and Tourism Development Division to monitor changing consumer behavior and how the statewide heritage and cultural tourism “products” are being perceived.

In our reconnaissance and site visits, RTM observed a wide range of locally made products and displays touting Kansas-made items. The quality of products varied, and recognition of “Made in Kansas” was often non-existent in local retail galleries and shops. One obstacle to realizing growth in craft purchases by visitors is locating quality, distinct items and learning about the artists. For cultural heritage visitors, “meeting the maker” is as much a part of the experience as purchasing the item. In fact, often the sale is a result of the education and orientation.

The visitor experiences at heritage sites throughout the State of Kansas varied as considerably. Some sites did not offer sufficient orientation and facilitation. Others offered un-engaging visitor experiences that no longer offer sufficient appeal for today’s more sophisticated traveler.

Clearly, product development is an issue that the State of Kansas must address. RTM offers the following suggestions in this pursuit:

### **8. Continue to build and expand a branded, managed “Made in Kansas” program**

- Many states – such as Kentucky, Alaska and Vermont – already have model “Made in” programs that can be replicated. Key practices for developing and managing a quality-based program include:
- Establish criteria for objects “Made in Kansas.” Define categories for inclusion and recognition.
- Orient artists regarding the “Made in Kansas” program, and how to participate/qualify in the program (through website, printed materials, educational forums.)
- Brand “Made in Kansas” through key marketing and incentive programs that help sustain local artists and ensure quality control/management so that the promise is delivered with exceptional customer satisfaction.
- Create and distribute “hang tags” or labels that can be placed on hand-made objects (that meet the “Made in Kansas” criteria.)

### **9. Develop and promote Kansas Artisan Trails**

Destinations such as Western North Carolina (HandMade in America) and Chicago have made it easy for visitors to find artists and purchase locally made objects. Here are a few ways that Kansas can stimulate heritage/craft development for tourism:

- Produce displays of locally-made items at visitor centers, with locator maps for visitors to identify how and where to purchase.
- Develop studio and factory tours to allow visitors to “watch it being made.” This is particularly effective for small production facilities of specialty foods or products where the tour concludes with a retail shop. Identify these opportunities in the state travel guide.
- Encourage tourism partners to create “immersion experiences” that connect visitors to artists through learning vacations. For instance, a visitor can visit a goat farm then make a hat from their wool or visit a glass factory where they can forge their own wine decanter.

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- Map an artisan trail to help visitors locate places where locally-made objects are sold. These maps should be included in the state visitor guide
- A separate Kansas Artisan Trails Guidebook can be produced, along with an accompanying CD to guide visitors to points throughout Kansas where original art, craft and rich heritage experiences can be found.
- Artisan Trail materials should include the stories of artists (their inspiration, how they started, why they choose particular subjects or disciplines, etc.).
- Sign “Kansas made” retail locations with decals, and as part of the wayfinding system (see section on signage)

### **10. Enhance the quality and diversity of skilled master artists**

- Create mentoring program (of master artists) to enhance the quality of craft statewide and stimulate skill development in young/emerging artists (via community college/ university programs, guilds and other entities.)
- Collaborate with local and state arts organizations to expand juried programs and exhibits around the state, set standards for excellence and increase recognition through awards, incentives.
- Establish apprentice programs to help carry on traditional disciplines, and/or assist master artists with creation of popular items. (For instance, Tamarack in West Virginia has established a program where apprentices create candlesticks with oversight from the original artist.)

### **11. Encourage retailers and wholesale outlets to “buy Kansas made”**

- Survey attractions and retailers around the state to determine “items of interest” including price points, and then share this information with artists to encourage creation of desired products. For instance, a historic site may want to carry transportation-related items that an artist in another region of the state may produce or can create.
- Create an electronic craft registry, listing names and profiles/products of Kansas artists that can be accessed by retailers for wholesale purchases.
- Provide technical assistance to local retailers, galleries and other outlets on how to display/showcase Kansas-made items.
- Encourage local restaurants and hotels/bed and breakfasts to use locally made objects in their facilities (placemats, glassware, artwork on walls, serve specialty foods, etc.) and tell customers where to purchase (or act as on-site retailer.)
- Encourage state agencies to purchase “Kansas made” items (over outside contractors) for souvenirs, gifts and other products that market the state or are for sale at state owned facilities. For instance, historic and cultural sites/institutions should purchase locally-made objects for sale in museum stores.

## **Visitor Orientation and Facilitation**

This study revealed that travelers in Kansas find insufficient orientation and facilitation for their trips. Gone are the days when travelers are willing or able to engage in a “scavenger hunt” in which they seek diligently to “find the good stuff”. Quite simply, their lives are too busy to allow for that kind of investigation.

Similarly, the “build it and they will come” mantra is a thing of the past. If one wants the customer today, they must make a concerted effort to lure them and compel their interest. With time poverty

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driving behavior, a strong enticement must be offered in order to win the attention and time of the visitor.

### **12. More dynamic visitor centers are necessary to provide better orientation and facilitate longer stays and greater spending**

Kansas state welcome centers lack the dynamic qualities necessary to inspire visitation. They really are little more than toilets and brochure racks. That is no longer acceptable in the realm of generating travel and tourism interest. Today's visitor center must be a "Sales Showroom" with visual displays, products, photographs, and an engaging staff who can compel visitation.

- RTM strongly recommends a strategic plan be developed to overhaul the state welcome centers and create the dynamic orientation and facilitation that will result in compelling travelers to spend more time and money in Kansas.
- The previously recommended Kansas Artisans Trails information and displays should be evident at the current visitor centers as well as being a key feature for the recommended enhanced centers.
- The center should house an overview film and engaging indoor and outdoor exhibits on the history of Kansas and its noteworthy citizens such as Amelia Earhart, Buffalo Bill, George Washington Carver, Wild Bill Hickok, Dwight Eisenhower and others.
- The center should also serve as a showroom of "teasers" that make people want to stay, shop, and explore. An exhibit of locally made crafts and specialty foods, with locator map or guidebook to places around the state where to purchase these items, will attract shoppers.
- This should be the one-stop "WOW" that makes people want to stay longer or return to Kansas.
- The staffing for these centers deserve focused training as well. Simply sitting behind a counter and asking "May I help you?" is not what is needed. The staff must be trained to actively engage travelers and help facilitate their trip planning. The goal is simple:  
***Putting heads in beds and making cash registers ring!***

- 13. Excellent signage and wayfinding are critical in getting travelers to cash registers. Ask local and regional tourism agencies to identify trouble spots where wayfinding and signage are required.** Signage and wayfinding rated fairly well in this study, yet still needs continuous monitoring and improvement. RTM strongly recommends that the KDCTTDD encourage local tourism groups to conduct wayfinding investigations to determine where signage and wayfinding is problematic. Suggestions should be added to a "Wish List" of improved signage that is communicated to state leaders. Better signage and wayfinding are critical in getting customers to cash registers.

## **Marketing**

During the course of this study, RTM reviewed a variety of marketing initiatives and tools including the state tourism website, the state travel guide, tourism advertising campaigns, and a number of other elements. Overall, we found these tools to be good, and to produce strong results. The Kansas Department of Commerce – Travel and Tourism Development Division has achieved a satisfactory level of accomplishment in its practices and tracks its results appropriately.

However, there are some improvements that are suggested by the data gathered in this report. RTM makes the following recommendations:

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### **14. The state travel guide and website are the most critically important marketing tools for heritage and craft product promotion**

- These are the tools most likely to be utilized by all travelers to Kansas, including those who engage in heritage and craft opportunities.
- The most important objective for both these tools is that their utmost priority is to serve the needs of the visitor rather than the needs of the tourism marketers. If the traveler can not trust the integrity of these tools they will fail. The KDCTTDD must adhere to this guiding principal.
- RTM recommends eliminating the fees charged to be included in the state travel guide. Rather inclusion should be based on selection criteria established by the KDCTTDD. This will allow the state to promote those sites and places that are of the most interest to the traveling public.
- All listings in the travel guide and website should be reviewed by KDCTTDD staff and adjusted as appropriate to ensure accurate portrayal of the product.
- RTM encourages the KDCTTDD to add a page to its state tourism website that features the places where travelers can find “Made in Kansas” craft and art. Links should be provided wherever possible.

### **15. Encourage Kansas artisans to develop “story tags” for their work**

- Encourage local artists to create a profile for use in marketing, displays and tags that depicts their Kansas roots, residence, inspiration, etc. This will help in creating interest in their work and making a stronger connection between the visitor and the creator.

### **16. Encourage themed exhibitions to focus on a rotating craft/art mediums**

- Encourage arts groups to schedule a calendar of special regional or statewide events where galleries have themed exhibits or “meet the artist” activities. For instance, San Antonio sponsors a themed month-long focus where all cultural institutions, galleries and heritage sites interpret, showcase and sell a particular discipline (March is dedicated to Watercolor, September is for photography, etc.) This type of themed collaboration stimulates off-season and repeat visitation.

### **17. Conduct an in-state agency campaign to promote the use of authentic “Kansas” experiences and objects by state agencies**

- It is helpful to periodically encourage and remind in-state governmental agencies that it is preferred to use authentic Kansas-made products for events and promotional activities such as the following:
  - Silent auctions at conferences
  - Thank you gifts to tour operators and media participating in familiarization tours
  - Ceremonial gifts for international missions
  - Promotional items for potential industrial recruitment
  - Etc.
- RTM recommends that each year a PR promotional mailing be prepared by the KDCTTDD to all in-state agencies that simply reminds them to purchase and use Kansas-made items.

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### **18. Encourage a marketing co-op entitled “Within 5 Miles of the Interstate”**

- Similar to the Kansas Artisan Trails, the purpose of this initiative is to get travelers off the interstates and give them tangible reasons to venture into Kansas to find arts, crafts, and unique experiences.
- This program would be a marketing co-op paid for and organized by the constituents. The role of the state is simply to make the suggestion that this would be a good marketing effort and encourage participation.

### **Leadership Support**

This cultural and heritage initiative must have statewide champions and strong leadership support in order to thrive. RTM strongly recommends that the statewide cultural and heritage tourism industry actively identify and recruit political leaders who will serve as champions for achieving these initiatives. This program of work can not be attained by state staff alone. Political champions are required in order to continue to drive development and earn the economic impact that is promised in this study.

### **Additional Research and On-going Evaluation**

Walt Disney said it best: “You don’t build it for yourself, you find out what the customer wants and you build it for them.” This is the essence of tourism success. Gone are the days when “if you build it they will come” worked in tourism. Today, there are simply too many choices already competing for the customer’s time and money. A destination who does not listen to the voice of the customer runs the risk of losing that customer to someone who does. That unfortunate scenario has been experienced in many industries. One only has to recall when American automobile manufacturers were so sure they knew what was best for the customer they neglected to do their homework. The Japanese listened intently to what the customer wanted and the rest, as they say, is history. RTM recommends continued evaluation, research and measurement of tourism success, unmet needs and marketing efforts for the KDCTTDD.