The Role of Food & Ag Tourism in the Western US

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The Role of Food & Ag Tourism in the Western US

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Outline

• Background
• Food tourism market
• Research purpose
• Survey data overview
• Factor and cluster analysis
• Results discussion
Background

• Western US has a strong tourism industry
• Local agriculture supplies unique, diverse, high quality foods
• Substantial growth in US local foods movement
  • The National Restaurant Association's 2014 Restaurant Industry Forecast
    • 7 of 10 consumers were more likely to visit a restaurant offering locally sourced items
    • “Top Ten Trends across the Nation,” included locally sourced meats/seafood and locally grown produce as the top 2 trends
  • The US travel Association reports that 17% of American leisure travellers engaged in culinary or wine-related activities within a three year period
Tourism Market in the West

• Western US a popular tourism destination, prime area for tourism development
  • 20+ national and state parks
  • Highly dependent on skiing, national parks, and outdoor recreation

• Idaho 2013 tourism indicators
  • 30.2 million total visitors
  • Total travel spending: $1.4 billion

• Nevada 2012 tourism indicators
  • 52.2 million total visitors
  • 24.6 million state/national park visits
  • Total travel spending: $58.1 billion

• Utah’s 2013 tourism indicators
  • 23.5 million total visitors
  • 4.2 million skier visits
  • Total travel spending: $7.5 billion
  • 40% of job market in rural counties
  • 2nd largest export industry
Buy Local Movement

- 185% increase in farmers’ markets from 2000 to 2014
- 275% increase in CSA programs from 2004 to 2014 (6,000)
- 288% increase in food hubs from 2007-2014 (302)
- The National Grocery Association 2014 Consumer Panel
  - The availability of local foods was a major influence on grocery shopping decisions as 87.2% of respondents rated local food availability as “very or somewhat important,” with 44.2% indicating “very important”
  - The need for “more locally grown foods” was the second most desired improvement among surveyed grocery shoppers at 32%
- In 2012, 164K farmers (7.8% of US farms) sold $6.1 billion in local foods
Farmers’ Markets in US

National Count of Farmers Market Directory Listings

Source: USDA-AMS-Marketing Services Division

Farmers Market information is voluntary and self-reported to USDA-AMS-Marketing Services Division
Food Tourism Market

- Food is one of the major tourism activities
  - 30-40% of tourism expenditures are on food/drink
  - Tourists tend to be less sensitive to food prices
  - Food is considered a “vital” component in the quality of a tourism experience
  - The product is the basis of food tourism

“All tourists eat, but what do you offer them?” (Wolf, 2014, pg. 310)
Tourist Types

• Non food/drink tourists
  • Those who see food/drink as just a necessary part of human existence

• Food/drink tourists
  • A second portion who use food/drink as a basis for some of their activities
  • A third portion who use food/drink to actually select the travel destination
Tourist Types

• Food/drink choices are motivated by... (Lee, 2012)
  • Cultural experience
  • Interpersonal relations
  • Excitement
  • Sensory appeal
  • Health concerns
• Food/drink tourists are considered cultural tourists (Croce and Perry, 2010)
  • Educated consumerism
  • Open to new experiences
  • Desire for lifelong learning
  • Independent travel
  • High expectations
Research Purpose

• Assist farmers, food processors, tourism hospitality providers, and local government/policy makers in enhancing the tourism experience and associated economic growth in rural areas
  • Improve the understanding of Western US tourist characteristics, preferences, attitudes, and behaviors
    • Consumer profiling enables tourism industry providers to engage with specific types of tourists (Gascoigne, Sullins, & McFadden, 2008; McFadden, Umberger, & Wilson, 2009; Wolf, 2014)
  • Tourism impacts job creation and sales of agricultural products (Lobo, Goldman, Jolly, Wallace, Schrader, & Parker, 1999)
  • Tourists may become a consistent revenue source for agricultural producers (Barbieri & Tew, 2008)
Research Purpose – Why?

• Agricultural producers seek to look to diversify product offerings, access new markets, and expand market periods and pricing to achieve sustainability
• Tourism providers struggle to find the regional distinctiveness necessary to differentiate themselves from other tourism destinations
• Food and ag-based tourism may provide a solution as it has been shown to:
  • Enhance a destination’s tourism offering
  • Generate additional economic opportunities for local growers and processors, especially in close proximity to prime tourism destinations
  • Provide a venue to promote and distribute local agricultural goods and value-added products
  • Provide tourists with the cultural experiences they seek
Definitions – Food Tourism

• Culinary tourism
  • May include activities such as guided tours of breweries or wineries, cooking classes, local source restaurants, buying food gifts, food and wine festivals, etc. (Croce & Perri, 2010; Smith, Costello, & Muenchen, 2010)

• Agritourism
  • May include activities such as farm tours, hay rides, farmers’ markets, corn mazes, “pick your own,” etc. (Wilson, Thilmany, & Sullins, 2006)
Survey Data Overview

• In-person survey of tourists in Utah (coming from/go ing to ID, NV, CO, MT), Summer 2013/Winter 2014
• Random sampling technique, 700 surveys completed
• 12 sites at gateways, national parks, airports, ski areas, convention and visitor centers
• Questions regarding
  • Demographics
  • Travel reason and current trip details (party details, length, lodging, expenses, etc.)
  • Travel activities of interest
  • Food/drink related interests and activities at home
  • Attitudes/interest/knowledge of Utah
Sample Demographics

• 68% married
• 52% male
• College degree 31%, graduate degree 40%
• 49% full time employed, 29% retired
• 84% White, 5% Asian, 4% Hispanic
• Average income in 2012 $103,000
• Average age 50 years
• Length of stay average of 10.6 days
• Average party size of 2.9 adults and 1.6 children
Travel Specifics

• Travel reason
  • Business 1%
  • Visiting family/friends 5%
  • Visiting national parks 9%
  • Outdoor activities 43%
  • Visiting cultural/heritage sites 24%
  • Special events/festivals 2%
  • Agritourism activities 9%
  • Passing through 6%

• Research/booking resource
  • Internet/website 41%
  • Brochure/booklet 10%
  • Recommendation from family/friend 3%
  • Tradition 32%
  • Other 14%
Food Interests

- Organization membership (18%)
  - Slow Food = 10%
  - Dining Club = 11%
  - Coop Grocer = 22%
  - Wine/Beer Club = 27%
  - Cooking Club = 8%
  - CSA = 15%
  - Other = 7%

- Dietary restrictions
  - Yes 15%
# Activities At Home & While Traveling

## At Home

- Buy locally sourced food: 3.52(1.16)
- Shop at farmer's markets: 3.08(1.14)
- Participate in a CSA: 1.73(1.11)
- Buy organic certified produce: 2.79(1.19)
- Visit local farms: 2.05(1.14)
- Cook at home: 4.29(0.80)
- Try new food items or recipes: 3.86(0.91)
- Buy food you don't recognize: 2.93(1.19)
- Eat ethnic foods: 3.57(1.05)
- Attend beer/wine festivals: 2.39(1.27)
- Food canning: 1.80(1.11)
- Beer/wine making: 1.35(0.88)
- Home gardening: 2.62(1.50)
- Composting: 2.14(1.49)
- Recycling: 4.35(1.07)
- Other: 3.75(1.89)

## While Traveling

- Buy locally sourced food: 2.80(1.19)
- Shop at farmer's markets: 2.46(1.16)
- Visit local farms: 1.77(0.95)
- Spend the night at local farms: 1.28(0.65)
- Participate in agritourism: 1.60(0.88)
- Cook at accommodations: 2.82(1.31)
- Try new food items or recipes: 3.48(1.06)
- Try local recipes: 3.12(1.19)
- Buy food items as souvenirs or gifts: 2.72(1.13)
- Seek out local sourcing restaurants: 2.97(1.23)
- Attend beer/wine festivals: 2.38(1.77)

*Rating scale of 1-5 (Never to Always)*
Analysis – Part I

- Factor analysis on “At home” and “While traveling” activity variables
  - While traveling: 11 variables, cut to 3 factors
  - At home: 15 variables, cut to 4 factors
- KMO test of sampling adequacy: 0.8 → the amount of shared variance warrants factor analysis
- Principle components, varimax rotation
- Kaiser criterion: retain factors with eigenvalues ≥ 1
## Factor Analysis of At Home Behaviors (n = 571)

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Factor Loading</th>
<th>Eigenvalue</th>
<th>% Variance Explained</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Local Foods</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shop at farmers' markets</td>
<td>0.638</td>
<td>3.917</td>
<td>8.58</td>
</tr>
<tr>
<td>Buy organic produce</td>
<td>0.61</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visit farms</td>
<td>0.59</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Food Experiences</strong></td>
<td></td>
<td>1.575</td>
<td>10.5</td>
</tr>
<tr>
<td>Try new foods/recipes</td>
<td>0.761</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eat ethnic foods</td>
<td>0.728</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Try new produce</td>
<td>0.681</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Do it Yourself</strong></td>
<td></td>
<td>1.287</td>
<td>26.11</td>
</tr>
<tr>
<td>Gardening</td>
<td>0.795</td>
<td></td>
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<tr>
<td>Canning/Preserving</td>
<td>0.747</td>
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<tr>
<td>Composting</td>
<td>0.667</td>
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<tr>
<td><strong>Food Connections</strong></td>
<td></td>
<td>1.259</td>
<td>8.39</td>
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<tr>
<td>Recycle</td>
<td>0.721</td>
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<tr>
<td>Cook at home</td>
<td>0.541</td>
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</tr>
<tr>
<td>Buy local foods</td>
<td>0.369</td>
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<tr>
<td><strong>Total Variance Explained</strong></td>
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<td></td>
<td>53.59</td>
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</tbody>
</table>
### Factor Analysis of "When Traveling" Behaviors (n = 566)

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Factor Loading</th>
<th>Eigenvalue</th>
<th>% Variance Explained</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Food Tourism</strong></td>
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<td>3.923</td>
<td>32.69</td>
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<tr>
<td>Try new foods</td>
<td>0.784</td>
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<tr>
<td>Try local recipes</td>
<td>0.751</td>
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<tr>
<td>Buy food related gifts</td>
<td>0.571</td>
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<tr>
<td><strong>Agritourism</strong></td>
<td></td>
<td>1.484</td>
<td>12.37</td>
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<tr>
<td>Spend a night at a farm</td>
<td>0.734</td>
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</tr>
<tr>
<td>Agritourism activities</td>
<td>0.722</td>
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<tr>
<td>Visit farms</td>
<td>0.337</td>
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<tr>
<td><strong>Local Foods</strong></td>
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<td>1.13</td>
<td>0.42</td>
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<tr>
<td>Buy local foods</td>
<td>0.639</td>
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<tr>
<td>Cook at accommodations</td>
<td>0.632</td>
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<tr>
<td>Shop at farmers' markets</td>
<td>0.377</td>
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</tr>
<tr>
<td><strong>Total Variance Explained</strong></td>
<td></td>
<td></td>
<td>54.48</td>
</tr>
</tbody>
</table>
Analysis – Part II

• Cluster analysis conducted – four primary tourist groups identified
  • Variables included trip characteristics, demographics, travel expenses, travel motivation, and participation in food and agriculture related activities and groups
  • k-means (partition method)
    • Observations assigned to clusters based on similarity with cluster mean
  • Number of clusters determined using the Calinski Harabasz pseudo-F index
Cluster Analysis

**Cluster Analysis Results**

<table>
<thead>
<tr>
<th>Cluster</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>36</td>
<td>8.6</td>
</tr>
<tr>
<td>2</td>
<td>123</td>
<td>29.3</td>
</tr>
<tr>
<td>3</td>
<td>125</td>
<td>29.8</td>
</tr>
<tr>
<td>4</td>
<td>91</td>
<td>21.67</td>
</tr>
<tr>
<td>Total</td>
<td>375</td>
<td>89.37</td>
</tr>
</tbody>
</table>
Cluster 1: “Large Family Trip” (9%)

- Average age: 52
- 67% married
- 44% graduate degree—well-educated comparatively
- Party size: 4.8 people—largest group
- Stay length: 5 days and travel to the area often
- Most use the internet in trip planning and unlikely to use brochures
- Unlikely to participate in outdoor recreation or visit national parks
- Most likely to participate in agritourism activities (visit farms, farm/ranch accommodations) when traveling
- Most likely to participate in canning, composting, and gardening (DIY) when home
Cluster 2: “Outdoor Experience” (29%)

- Average age: 48
- More likely male and least likely to be married
- Party size: 2.8 people—smallest group comparatively
- Least educated group
- Stay length: 4.7 days—the least amount of time comparatively
- The most likely group to use a brochure in trip planning
- Most interested in outdoor recreation
- Less interested in food related activities at home or when traveling comparatively and spend the least per person on their trip
Cluster 3: “Sophisticated Food Travel” (30%)

- The oldest group and most likely to be married
- 60% graduate degrees—the most educated group
- 74% use the internet in trip planning
- Stay length: 14.3 days
- The most likely to travel for business reasons, but also most likely to visit national parks
- Spend a lot per person ($695) and visit the area often
- The most likely to seek out local foods when traveling, such as buying local foods, shopping at farmers’ markets, and cooking at accommodations
- Participate in food related activities at home such as cooking and buying local foods, and sustainable behaviors such as recycling
Cluster 4: “Food and Culture Pilgrimage” (22%)

- Average age: 42—the youngest group
- Married and more likely female
- Most educated in terms of bachelor and graduate degrees
- Party size: 3.8
- Make annual or traditional visits, don’t use outside resources
- Most likely to visit culture and heritage sites
- Stay length: 10.5 days and spend most per person ($960)
- Most likely to seek out food experiences (try new foods, local recipes) while traveling and at home and buy food gifts
- More likely to belong to beer and wine clubs, and purchase organic foods, and visit farms and farmers’ markets at home
Discussion of Results

- Specific activities are associated with overarching themes/factors in tourist minds
  - Expansion into related activities can greatly improve the “destination” appeal and provide a more holistic tourist experience
- Tourists can be placed into exclusive or target groups based on characteristics, preferences, trip characteristics, motivations, etc.
  - Tourism products/activities can be tailored to the specific needs and interests of each group
- Economic expansion through additional sales to current visitors
Discussion of Results

• Overall highly educated, married, seeking outdoor recreation, cultural/heritage sites, and agritourism activities
  • Excellent potential in 61% of sample
• Culinary experiences - local sourcing restaurants, local and ethnic food and drink festivals, winery tours, processed foods for gifts such as honey, cheese, etc.
  • Cluster 4 – Food and Culture Pilgrimage (22%)
• Agritourism activities - farm stays, u-pick operations, hay rides, etc.
  • Cluster 1 – Large Family Trip (9%)
• Local food experiences - farmers’ markets, cooking demos, farm shops, etc.
  • Cluster 3 – Sophisticated Food Travel (30%)
• Internet-based promotional programs most useful
• Quality experience essential – ensure repeat visits
Thank you!

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