The Role of Food & Ag Tourism in the Western US

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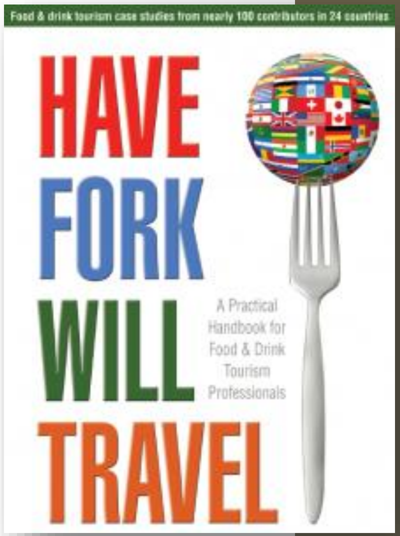

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Outline

- 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

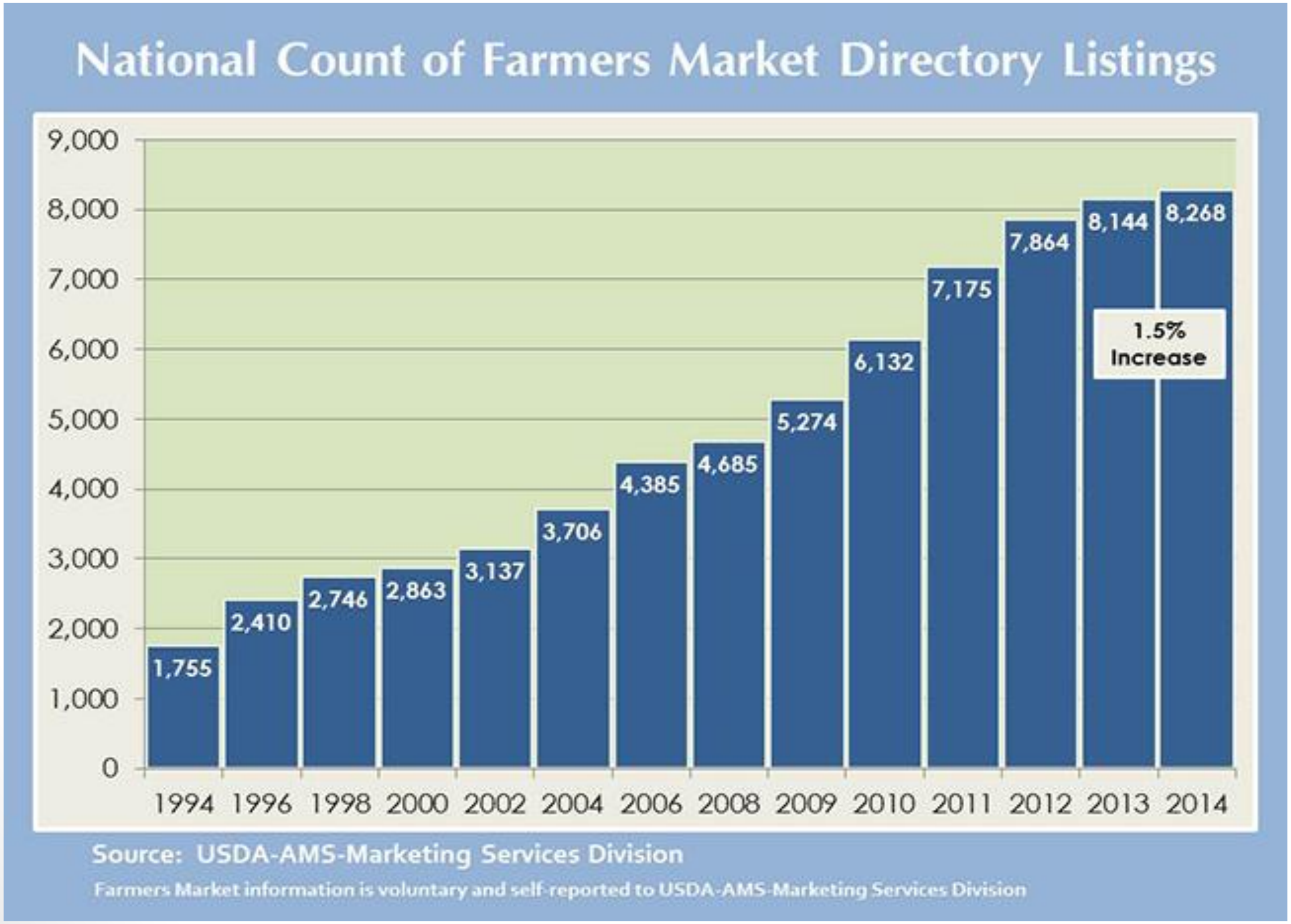
Tourism Market in the West

- 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



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/going 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	2.72(1.13)
gifts:	2.97(1.23)
Seek out local sourcing	2.22(1.28)
restaurants:	3.67(1.33)
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 At Home Results

Factor Analysis of At Home Behaviors (n = 571)

Behavior	Factor Loading	Eigenvalue	% Variance Explained
Local Foods		3.917	8.58
Shop at farmers' markets	0.638		
Buy organic produce	0.61		
Visit farms	0.59		
Food Experiences		1.575	10.5
Try new foods/recipes	0.761		
Eat ethnic foods	0.728		
Try new produce	0.681		
Do it Yourself		1.287	26.11
Gardening	0.795		
Canning/Preserving	0.747		
Composting	0.667		
Food Connections		1.259	8.39
Recycle	0.721		
Cook at home	0.541		
Buy local foods	0.369		
Total Variance Explained			53.59

Factor Analysis When Traveling Results

Factor Analysis of "When Traveling" Behaviors (n = 566)

Behavior	Factor Loading	Eigenvalue	% Variance Explained
Food Tourism		3.923	32.69
Try new foods	0.784		
Try local recipes	0.751		
Buy food related gifts	0.571		
Agritourism		1.484	12.37
Spend a night at a farm	0.734		
Agritourism activities	0.722		
Visit farms	0.337		
Local Foods		1.13	0.42
Buy local foods	0.639		
Cook at accommodations	0.632		
Shop at farmers' markets	0.377		
Total Variance Explained			54.48

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

Cluster	N	%
1	36	8.6
2	123	29.3
3	125	29.8
4	91	21.67
Total	375	89.37

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 accommodatons) 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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