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Bear River Heritage Area Visitor Survey - General Results

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Introduction

Heritage tourism, sometimes referred to as cultural-heritage tourism, is one of the fastest growing sectors of the tourism market today (Kerstetter, Confer, & Graefe, 2001). However, research is still needed to gain a better understanding of the multiple facets of heritage tourism and its impact on the overall tourism economy, which amassed a total economic output of \$1.37 trillion in 2011 in the United States (Zemanek, 2012).

A relatively new trend in heritage tourism is the establishment of heritage areas comprised of unique assortments of natural, cultural, and heritage attractions and activities specific to a region. Such heritage areas are quite diverse with many different levels of classification, from informal collectives of heritage sites without legal bindings, to districts with local designations (e.g., community historic districts), to areas with state designations (e.g., State Heritage Areas), to areas with federal recognition (e.g., National Heritage Areas), and finally sites with multinational/international recognition (e.g., UNESCO World Heritage Sites).

The purpose of this study is to gain a better understanding of visitors to sites and attractions within the Bear River Heritage Area (BRHA), with the research focused on gathering baseline data of BRHA visitation by acquiring information on visitor demographics and characteristics, their destinations and activities, and satisfaction with their experiences at sites

throughout the BRHA. As the first ever comprehensive visitor study conducted in the BRHA, hopefully the findings and study-based recommendations will be useful to the BRHA, its partners, and the owners/managers of heritage businesses in the BRHA.

The Bear River Heritage Area

The BRHA is currently recognized as a State Heritage Area by both Utah and Idaho. It covers seven counties in northern Utah and southeastern Idaho (Figure 1) and consists of heritage sites, attractions, and businesses with historic ties to the region. Its governing council coordinates and markets the heritage sites, attractions and activities throughout the heritage area. Flagship sites include Golden Spike National Historic Site, the National Oregon-California Trail Center, Bear Lake, and the American West Heritage Center. The BRHA website describes the heritage area as follows:

The Bear River Heritage Area straddles the Idaho-Utah border where the Great Basin and the Rocky Mountains meet. It is home to the Northwestern Band of the Shoshone Nation, a strong agricultural economy, history-laced landscape, and abundant natural beauty. (BRHA website, 2013)

Research Methods

This research incorporated two types of survey instruments to collect data from visitors at a variety of

sites and attractions throughout the BRHA. The first survey was a brief twelve-question intercept survey consisting of questions asked of visitors to determine respondent familiarity with the BRHA, group size and makeup, primary destination and purpose of visit, length of trip, past visits to heritage sites, time spent gathering information for the trip, and demographic information. At the end of this intercept survey, respondents were asked if they would be willing to participate in a more detailed mail survey, and those who agreed were asked to provide their name and mailing address. The mail survey consisted of 25 main questions broken down into 6 categories including: visitor experience, lodging, satisfaction, importance-performance, visitor expenditures, and demographics.

Sampling Method

The survey sample via the intercept survey was collected between May 28th, 2012, and October 30th, 2012. Sites in each of the four regions of the BRHA were selected at which to administer surveys (Table 1), most of which were conducted by trained research assistants with the Institute for Outdoor Recreation and Tourism (IORT). A few surveys were administered by site personnel, such as visitor center or museum staff. Sites selected were chosen for one or a combination of the following reasons: location of site, high visitation, type of tourism activity offered, or lack of surveying

restrictions. Some of the sites within the BRHA (e.g., Golden Spike NHS) were not available as survey locations due to site regulations put in place by the managing agency that prevent contact of visitors. Other sites were not selected due to low visitation or distance from the research project base in Logan, Utah. Overall, 7 sites were selected for surveying by staff personnel and 19 sites were selected for surveying by IORT researchers. A tally of intercept survey refusals was kept for each survey location. Only 42 refusals (6.5 %) were recorded by researchers in the field. Refusal rates at the sites where surveys were administered by other personnel are unknown. However, only a small number (n=81;11%) of surveys were collected using this method.

Results of this study were drawn from a final sample of 728 BRHA visitors at one of 25 intercept survey locations between May 28th and October 30th, 2012. When accounting for group size the intercept survey represented a total of 4,500 individuals visiting the BRHA. Of the 728 intercept survey respondents, a sample of 305 (42%) was obtained for a mail survey, which included individuals who indicated their willingness to participate during the intercept survey. Mail surveys were sent to all 305 respondents. Of these, four surveys (1.3%) were returned as undeliverable, and of the remaining 301 surveys, 187 were returned for a mail survey response rate of 62.1 percent.

General Results

General results from the intercept survey and the mail survey provide the first ever record of visitor demographics and characteristics in the BRHA. The intercept survey sample represented an equal number of males and females. Respondent age ranged from 18 to 88 years with an average age of 49 years. Group size ranged from single individuals to groups of 100 with a median of three individuals per group. The majority of groups consisted of families or families and friends (81.8%). When compared to the general population, the sample was highly educated, with almost 34% of respondents possessing a Bachelor's degree and almost 35% percent possessing a Graduate or Professional degree. Slightly over 61% of respondents had annual household incomes over \$50,000. These demographic findings are similar to findings in other research conducted on heritage tourists in the past (Kerstetter et al., 2001). While most of the BRHA visitors came

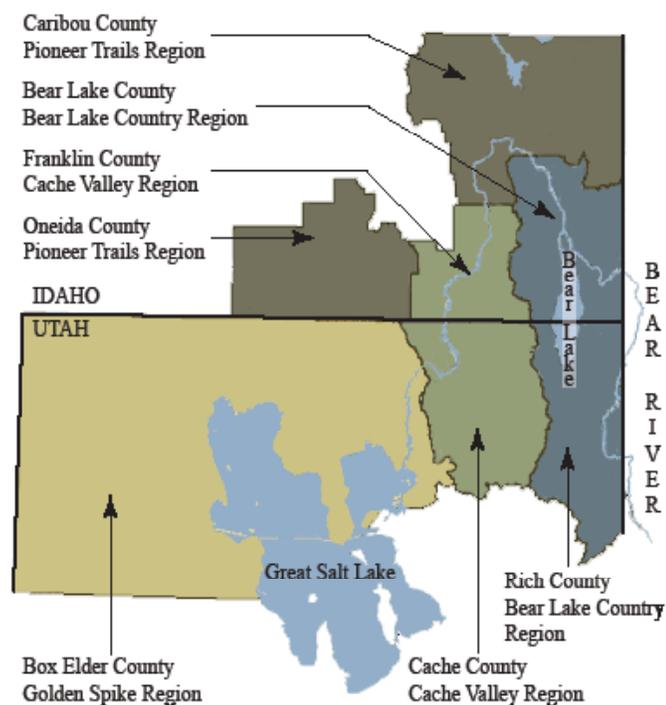


Figure 1. Bear River Heritage Area (Counties and Regions).

from Utah (almost 53%), followed by Idaho (13%) and California (slightly over 5%), visitors came from 37 different states and 13 foreign countries. Additionally, almost three-quarters of the visitors resided outside of the seven-county BRHA region. Lastly, while individuals from across the country and the world were represented, there was little diversity of racial or ethnic groups, with whites making up almost 96% of the sample.

Visitor Awareness of the BRHA

Initially, in the intercept survey respondents were asked if they were familiar with the term Bear River Heritage Area. Of the 728 respondents, 602 (82.7%) indicated they were not familiar with the term. Of the 17.3% who were familiar, 37% gained their knowledge from living in the area or hearing about it from family and friends, and almost 25% were familiar because of a visitor center/museum or brochure/guidebook. Respondents indicated multiple information sources for their trip in the BRHA with over three-quarters identifying a previous trip, family/friends, and/or the internet as information sources.

The BRHA Visitor Experience

Although almost 50% of respondents indicated their primary destination as being the site or attraction where the intercept survey occurred, slightly over 44% indicated they were “just passing through,” and only 3.4% indicated their primary destination as the BRHA. The primary purpose of the visit was for sightseeing (56%) and outdoor recreation (22%), followed by specific event (8%), just passing through (6%), visiting family/friends (2%), and a variety of other purposes (6%). Over one-third of respondents (38%) stayed one or more nights in the BRHA (average of 3.5 nights and a median of 2 night stays) in vacation homes/cabins (27.7%), hotels/motels (21.7%), camping (20.6%), at homes of family/friends (14.2%), RV Parks (12.7%), and Bed & Breakfasts (3%). High levels of satisfaction were expressed by visitors for their overall BRHA experience, the quality of attractions and services, and the friendliness and helpfulness of service workers. For more detailed analysis, 22 attributes associated with the visitor experience were identified related to information, attractions, and services, and respondents were asked to rate both the level of their perceived importance and satisfaction for each one. An Importance-Performance Analysis was then conducted in order to highlight

certain attributes rated as very important but perhaps not performing as well for visitors with respect to their satisfaction, and thus perhaps deserving of more attention by the BRHA council and the owners/managers of attractions and services.

Visitor Spending and Economic Impact

Additionally, in the mail survey, respondents were asked to estimate their trip expenditures in seven economic sectors identified by the North American Industrial Classification System (NAICS). The mean total expenditure per person residing outside of the seven-county BRHA region was \$68.30, whereas the median per person expenditure was \$37.50. Based on visitor expenditure data, an economic impact analysis was conducted, as reported in Jakus, Burr, Baird, and Silva (2013).

Study-Based Recommendations for the BRHA

This study provides valuable information for the BRHA Council, partners, and the owners/managers of sites, attractions, services, and businesses, by providing demographic and trip information about visitors to the BRHA. Hopefully study-based recommendations based on the data will be useful for planning and to further the work of the BRHA and its partners.



Table 1. *Intercept Survey Locations*

Table 1-1

Intercept survey locations

Region	Location	Method of contact	Number of respondents	Percentage of sample
Golden Spike	Spiral Jetty	Researcher	76	10.4
	Brigham City Museum	Researcher	13	1.8
	UT I-15 Welcome Center	Site Staff	5	0.7
Cache Valley	American West Heritage Center	Researcher	70	9.6
	Riverside Trail	Researcher	38	5.2
	Franklin Relic Hall	Site Staff	26	3.6
	Cutler Marsh	Researcher	12	1.6
	Cache DUP Museum	Researcher	8	1.1
	Bear River Massacre Site	Researcher	4	0.5
	Cox Honeyland	Site Staff	2	0.3
Bear Lake Country	Bear Lake Overlook	Both	89	12.2
	Limber Pine Trail	Researcher	58	8.0
	Minnetonka Cave	Researcher	56	7.7
	Laketown Rest Area	Researcher	45	6.2
	Oregon-California Trail Center	Site Staff	30	4.1
	Paris Museum	Site Staff	7	1.0
Pioneer Trails	Soda Springs Geyser	Researcher	79	10.9
	Welsh Heritage Festival	Researcher	41	5.6
	Chesterfield Townsite	Researcher	37	5.1
	Hooper Spring	Researcher	15	2.1
	Oneida Pioneer Museum	Researcher	5	0.7
	Cherry Creek Visitor Center	Site Staff	4	0.5
	Sheep Rock	Researcher	4	0.5
	Niter Ice Cave	Researcher	2	0.3
	Last Chance Canal	Researcher	2	0.3

1. Work to increase BRHA name recognition and visitor awareness of heritage sites.

Of primary importance is “name recognition” for the BRHA, as intercept survey findings showed only 17.3% of those surveyed being familiar with the term Bear River Heritage Area, and many of those who were familiar had only heard of it from a previous trip, from family and friends, or in passing through. As a relatively young organization, the BRHA is establishing its brand and recognition, partners, and customer base. Although some heritage sites affiliated with the area have strong visitation numbers and name recognition at the local level (e.g., American West Heritage Center) and national level (e.g., Golden Spike NHS), many visitors, and local residents, still have low levels of awareness of the BRHA as an established organization and especially as a state-recognized heritage area. Even some personnel at sites affiliated with the BRHA were unsure of what the BRHA was when contacted for assistance with this study. Efforts to increase name recognition and branding should be given priority, for both visitors and residents. This is especially important

as 60% of visitors obtained their information for their trip during a previous trip or from family and friends who had previously visited the area.

2. Increase cooperation and cross referrals between heritage offerings; facilitate more interconnectivity between and among heritage sites, attractions and visitor services.

Part of increasing name recognition and brand awareness involves knowledgeable local and regional partners providing sites, attractions, and visitor services in the BRHA, and promoting the BRHA to visitors. Residents and business owners need to be aware of the BRHA, its mission, purpose, and goals. High levels of satisfaction were expressed by survey respondents for the BRHA and its quality of sites and attractions, and the friendliness and helpfulness of service workers. The BRHA has a good range of activities that visitors and tourists can enjoy, but there is a need for stakeholders to cooperate more fully in referring visitors to other sites, attractions, and services, and to facilitate greater inter-connectivity in the BRHA.



3. Take advantage of location and cater more to those visitors passing through the BRHA region.

The location of the BRHA between the highly populated Wasatch Front in Utah and population centers in southern Idaho, and the tourism hotspots of Yellowstone and Grand Teton National Parks, provides a unique opportunity for the BRHA to be an intermediate destination for visitors. Forty percent of survey respondents indicated they were just passing through and decided to stop at a particular heritage site or attraction. Some of the visitors commented they had no idea what the BRHA had to offer as part of their trip, and if they had they may have stayed longer in the BRHA. Although many visitors said they would return, this highlights the importance of continued marketing and information dissemination to visitors, and for greater cooperation among BRHA associated sites, attractions, and services to promote all of the greater BRHA.

4. Promote high performing destination attractions and service amenities as area strengths.

Many visitors to the BRHA are older, highly educated and affluent. These heritage tourists are seeking high performing heritage attractions along with service amenities to support their needs during their trip. The BRHA has many such attractions and services, and it is important to continue to market and promote these as BRHA strengths. Another potential tourist

market segment exists, in that a very large majority of BRHA visitors indicated their race or ethnicity as white. Many of the BRHA's site and attractions would certainly be of interest to visitors of different minority or underrepresented groups, along with international visitors, and some marketing and promotional efforts could be devoted to increasing such visitation.



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