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CO LORADO'S AGRITOURISTS: WHO ARE THE ADVENTURERS, THE SEEKERS AND THE EXPLORERS? ¹ Dawn Thilmany,² Alex Ansteth² and Martha Sullins³

This fact sheet is one in a series that report findings of a 2007 survey of Colorado agritourism visitors. This report focuses on segments of travelers defined by their traveling choices, agritourism activities and demographics. With this information, the Colorado tourism industry, and the agritourism sector in particular, can plan and create strategies that will help retain or grow those consumer segments already seeking out agritourism activities, and seek to increase the potential interest and participation of those who have some interest but haven't yet made agritourism a part of their travel plans.

Agritourism represents a fairly significant part of the Colorado tourism industry. A previous report in this series noted that nearly 75% of the survey respondents who had traveled to Colorado in 2005 and 2006 participated in at least one agricultural, food or heritage activity on their trips. Of those, more than one-third reported that agritourism was a primary or secondary reason for their trip to Colorado. Among a sample of just over 1000 visitors, one in five said that they participated in agritourism activities more than 3 times a year. Fifty-six percent of these frequent participants were Colorado residents.

It is encouraging that a high share of Colorado visitors participates in agritourism, but there may be opportunities to expand participation, the number of overall visitors, or length of visitors' stays by actively **marketing** to certain types of travelers. To effectively **market** to travelers who plan and carry out their trips in different ways, it is important to understand their behavior. In this study, travelers were segmented into populations who plan, travel and recreate similarly when in Colorado, as a way to understand and target different types of travelers with specific marketing and promotion programs and activity packages.

After performing a statistical cluster analysis, we compared responses across a wide range of variables in order to describe Colorado visitors. After examining differences across travelers, we labeled the five groups of travelers who visit Colorado, based on how their behavior is unique from other segments. A brief summary of these clusters shows:

- **Cluster 1:** Four percent of the total 897 visitors surveyed are **Out-of-State Activity Seekers**. These are primarily out-of-state travelers who fly to Colorado and rent a car to explore the state for

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longer trips (nearly 6 days on average). This group is made up of mid- to upper-middle class parents traveling either with several children or with friends, who stay in hotels or with friends and family. Although agritourism is not a primary focus, two-thirds do participate in unplanned agritourism activities a few times per year (about a quarter of those activities occur in Colorado). These activities revolve around culinary events and, to a lesser degree, on-farm or heritage activities. They plan their travel mostly by Internet and are most likely to use Colorado Tourism Office resources or other in-state resources such as Welcome Centers.

- **Cluster 2:** This group comprises 30% of the sample and are primarily Coloradans who tour the state in their own cars for long weekends or shorter trips (4 days on average). They typically stay in hotels or with friends and family. These *In-State Explorers* are equally apt to choose culinary and educational and nature-based on-farm experiences, but most of their agritourism activities are unplanned. Most of their trip planning is based on past experience or recommendations from friends and family. They make 41% of their trips in winter, with the remainder primarily in spring and summer.
- **Cluster 3:** The *Loyal Colorado Enthusiasts* make up 13% of the visitors surveyed. These visitors are primarily in-state travelers and are parents or couples who return often based on past experiences. They make up the highest share of participants in outdoor recreation on farms and ranches during the summer. This group is most likely to camp and shows significant interest in traveling throughout the state. They plan to participate in a diverse set of agritourism activities and report more visits to agritourism enterprises relative to two years earlier. Most of their trip planning is based on past experiences and personal web searches so they tailor their trips specifically to their interests.
- **Cluster 4:** The *Family Ag Adventurers* are 17% of the 897 survey respondents. They travel from other states in their own vehicles, mostly in the summer, with a total of 5 days spent in Colorado. Although most of their agritourism activities are unplanned, they do half of these activities in Colorado and they pre-plan 25% of their activities based on past experiences and recommendations from others, as well as Web-based information searches. They are

middle income and willing to visit local enterprises, and will travel long distances to reach a variety of agritourism destinations. They gravitate toward educational and nature-based on-farm experiences, but they also enjoy more active farm and ranch activities and culinary experiences. However, since these are big family vacations, this group of travelers does not plan to visit Colorado again in the next several years.

- **Cluster 5:** The *Accidental Tourists* make up the remaining 36% of survey respondents and are among the least promising agritourism visitors from a marketing perspective. This segment visits mostly in summer and winter, either by car or air, and stays mostly in hotels or with friends and family. They travel primarily without children or by themselves, and may be coming for non-recreational business, educational, or convention activities. While this group is only in the state for a few days with small windows of time for leisure (for which they may not have planned), they may look for activities to occupy their free time. In short, they are not seeking agritourism activities and a very low share of their total activities take place in Colorado.

The following figures and tables examine demographics, travel behavior and choices across these consumer clusters, and point to potential opportunities for strategic partnerships and marketing that can further grow the agritourism industry in Colorado.

Demographics

Figure 1 shows the differences in lifestage among clusters, and highlights the higher number of parents in the Out-of-State Activity Seekers and Family Ag Adventurers relative to the other three groups. Although singles make up a large share of the In-State Explorers (20%) and Accidental Tourists (23%), travel parties with parents and children still represent the majority in all the groups. On a related note, analysis of the questions related to travel parties shows that families traveling with children make up 39% of the sample as a whole.

Figure 2 shows that the In-State Explorers and Accidental Tourists have the highest share of high-income travelers (9% and 10%, respectively), although the Accidental Tourists have the most diverse income levels.

The Out-of-State Activity Seekers have a high number of upper-middle and upper-income households, with a very low share of low-income households. It is interesting to note that the two segments that have the

greatest interest in agritourism have more lower and middle income households, suggesting that agricultural, food and heritage activities may be perceived as a value for vacationers with more limited budgets.

Figure 1: Lifestage of Colorado Visitors by Cluster, n=897

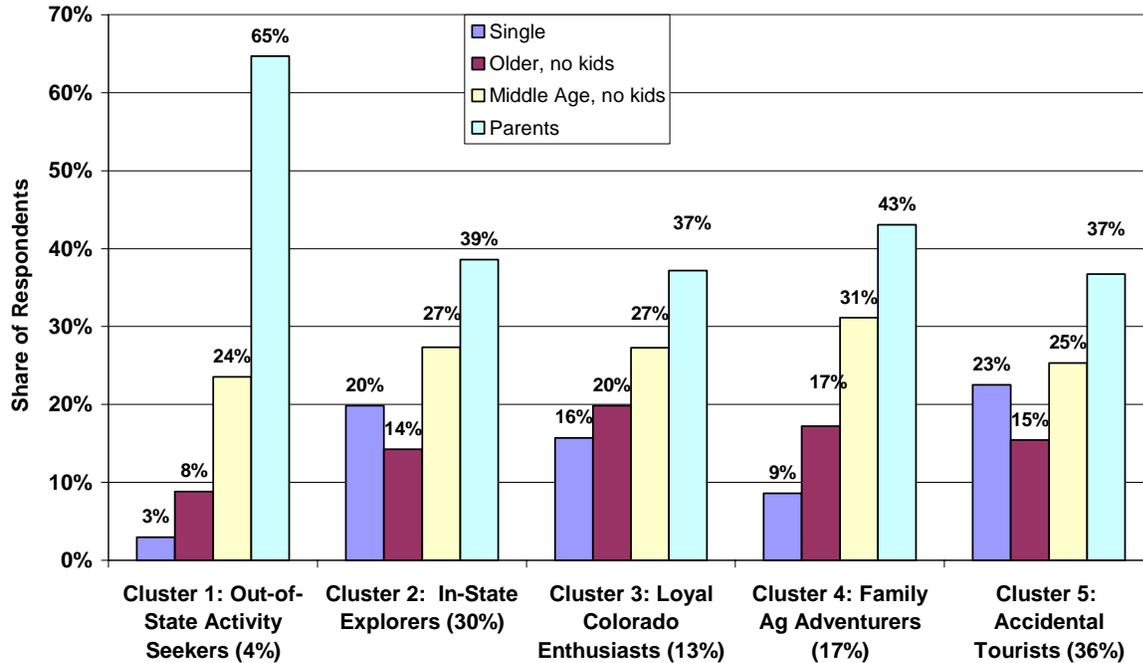


Figure 2: Income of Colorado Visitors by Cluster, n=897

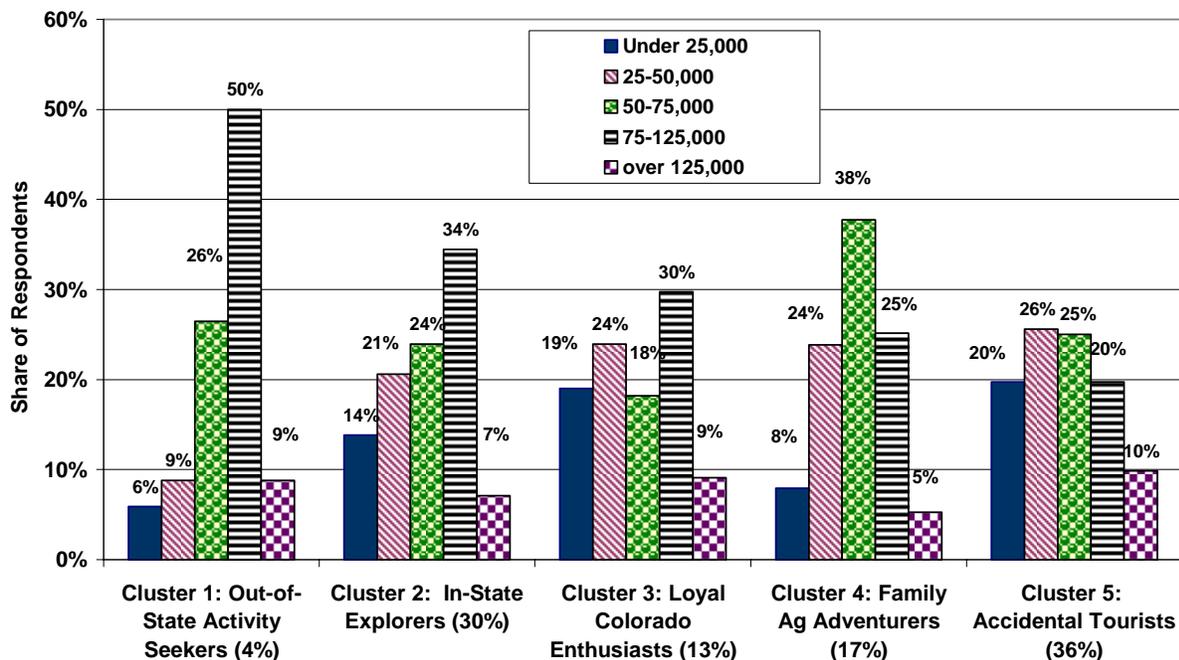


Table 1: Travel Behavior among Segments, n=897

	Out-of-State Activity Seekers (4%)	In-State Explorers (30%)	Loyal Colorado Enthusiasts (13%)	Family Ag Adventurers (17%)	Accidental Tourists (36%)
Number in Travel Party	2.9	3.4	3.4	3.3	3.5
Trip Length (days)	5.9	4.0	4.9	5.1	4.0
Share of Agritourism Participation per Year	3%	20%	47%	27%	24%
Share of Agritourism Participation in Colorado	7%	42%	65%	55%	24%
Share who Note an Increase in Agritourism Visits as Compared to 2 Years Ago	4%	11%	31%	21%	24%

The highest number of out-of-state visitors was among the Out-of-State Activity Seekers (97%), Family Ag Adventurers (76%) and Accidental Tourists (65%), the first two of which are target segments for Colorado’s agritourism industry.

Travel Behavior

Although demographics are interesting to consider, it is more relevant to consider how behaviors and attitudes differ among the segments. Table 1 shows that all 5 groups travel in parties of 3-4 people on average, but the Out-of-State Activity Seekers spend the greatest amount of time in Colorado (nearly 6 days), while In-State Explorers and Accidental Tourists make the shortest trips. The Loyal Colorado Enthusiasts show the greatest participation in Colorado agritourism and increase in participation as compared to two years ago, while the Out-of-State Activity Seekers report the lowest participation and relative increase.

Table 2 shows visits to Colorado by season for each cluster. Although summer is the most popular time for trips among most clusters, it is particularly popular among the Loyal Colorado Enthusiasts and Family Ag Adventurers. However, the In-state Explorers and Out-of-State Activity Seekers show more promise for increased agritourism visitation during Colorado’s fall “shoulder season” between the ski and summer season. Finally, Accidental Tourists are the most evenly distributed across the four seasons, as one would expect from a group that is drawn to the state/area by work, educational or other non-leisure purposes, but the prevalence of summer and winter travel may also signal that the “traditional” tourism destinations and activities do a more effective job of recruiting these travelers to their enterprises.

Table 3 provides traveler responses about the type of planning resources they used for their most recent trip: an important piece of information for the industry when

Table 2: Season of Visits by Cluster, n=897

Share of Visits by Season	Out-of-State Activity Seekers (4%)	In-State Explorers (30%)	Loyal Colorado Enthusiasts (13%)	Family Ag Adventurers (17%)	Accidental Tourists (36%)
Summer	32%	24%	69%	56%	35%
Fall	26%	29%	21%	21%	19%
Winter	29%	41%	7%	9%	33%
Spring	12%	7%	3%	14%	13%

it considers investing more resources in promotion to reach the targeted audiences. Among all clusters, past experiences and recommendations were among the most frequently mentioned, but personal experiences were particularly important for Loyal Enthusiasts and In-State Explorers, while Family Adventurers also relied on recommendations from others.

Web resources were the next most commonly used, especially among the out-of-state visitors (Activity Seekers and Accidental Tourists). The Colorado Tourism Office and Welcome Centers were also cited, especially among two of the segments that show the greatest interest in agritourism: a strong signal that partnerships with the Tourism Office would be fruitful in growing this segment. Two of the target segments, Loyal Colorado Enthusiasts and Family Ag Adventurers, use travel associations, park brochures and other print materials to

plan. Unfortunately, signage is not yet serving as a promotional tool for this sector, even though other states have had great success in using signage to direct travelers' activities and choices. However, since signage is a last-minute unplanned piece of information, it is logical that the in-state travelers use it most, and our survey results show that it contributes to visitor satisfaction with the overall agritourism experience.

The Role of Agritourism in Colorado Visits

There is some question as to how important agritourism is to Colorado's tourism industry and, thus, how much economic activity it generates for the state. Figure 3 presents evidence on how important agritourism activities are to Colorado travelers' vacation and travel plans. As the introduction suggests, agritourism is not of interest to everyone, but there are travel

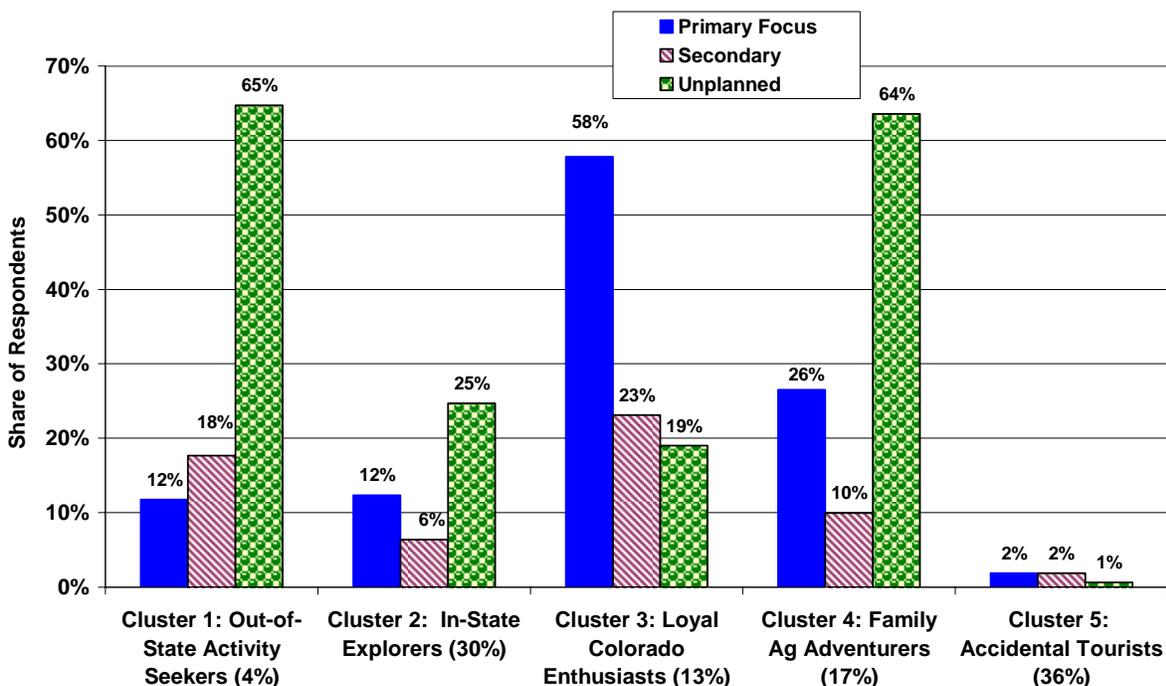
Table 3: Trip Planning Resources by Cluster, n=897

Resources Used to Plan Trip to Colorado*	Out-of-State Activity Seekers (4%)	In-State Explorers (30%)	Loyal Colorado Enthusiasts (13%)	Family Ag Adventurers (17%)	Accidental Tourists (36%)
Past Experience	35%	64%	76%	56%	52%
Arranged by hotel	6%	5%	2%	2%	7%
Travel Website	50%	13%	4%	7%	14%
Personal Web Search	24%	15%	24%	19%	15%
Travel Agency	15%	0%	0%	0%	1%
CO Tourism Office	29%	8%	17%	13%	2%
Welcome Center	15%	6%	9%	9%	2%
Magazines	6%	4%	3%	3%	3%
Mailing	0%	1%	1%	1%	1%
Signage	0%	2%	3%	1%	0%
Travel Assn.	21%	8%	12%	12%	7%
Park Brochures	9%	4%	17%	14%	2%
Regional Website	9%	6%	7%	7%	2%
Regional Brochure	3%	2%	2%	1%	1%
Recommendations	21%	22%	17%	30%	16%
Other	3%	4%	1%	1%	3%

Note: Respondents checked all resources used that applied to their travel planning, so totals could sum to more than 100%

Figure 3: Importance of Agritourism to Visit

By Cluster, N=897



segments for whom these activities are represent a major focus. The Family Ag Adventurers and the Loyal Colorado Enthusiasts were most likely to indicate their last travels were primarily driven by their plans to participate in agritourism activities, one of the main reasons they are considered great opportunities for growing the industry.

In a subsequent report, these numbers will also be used to estimate the economic activity generated by the agritourism sector. It is a very real possibility that, in the future, effective marketing could encourage more Colorado visitors to consider agritourism activities as important planned elements of their trip or, even better, it could bring new visitors to the state who realize Colorado has a unique heritage and ag-natural resource interface, as well as a burgeoning set of wine, food and culinary experiences.

The types of agritourism activities in which travelers participate also vary among consumer segments (Figure 4). The Loyal Colorado Enthusiasts greatly preferred the Food/Culinary experiences to any other activity, while the Out-of-State Activity Seekers, Loyal Colorado Enthusiasts and the Family Ag Adventurers were

all more likely to participate in education, recreational activities and experiences on farms and ranches (including wildlife viewing, tours, camping and agritainment). Overall, heritage experiences made up only 13.5% of all activities of those surveyed, but they were more popular among the Loyal Colorado Enthusiasts (31%) and Family Ag Adventurers (28%).

Lodging Choices

Figure 5 shows that, not surprisingly, hotels were the most popular lodging for the whole sample and most segments, except for the higher frequency of camping noted among Loyal Colorado Enthusiasts. Staying with friends is also popular among many of the segments, especially the In-State Explorers and Accidental Tourists. In fact, Accidental Tourists may be not vacationing, but rather, visiting students in school or family members and, therefore, happening upon agritourism activities as they seek to fill out free time within trips made for other reasons. Finally, the Out-of-State Activity Seekers were the segment who made the most use of condos or second homes, which is consistent with their relatively longer stays.

Figure 4: Participation in Agritourism Activities by Cluster, n=897

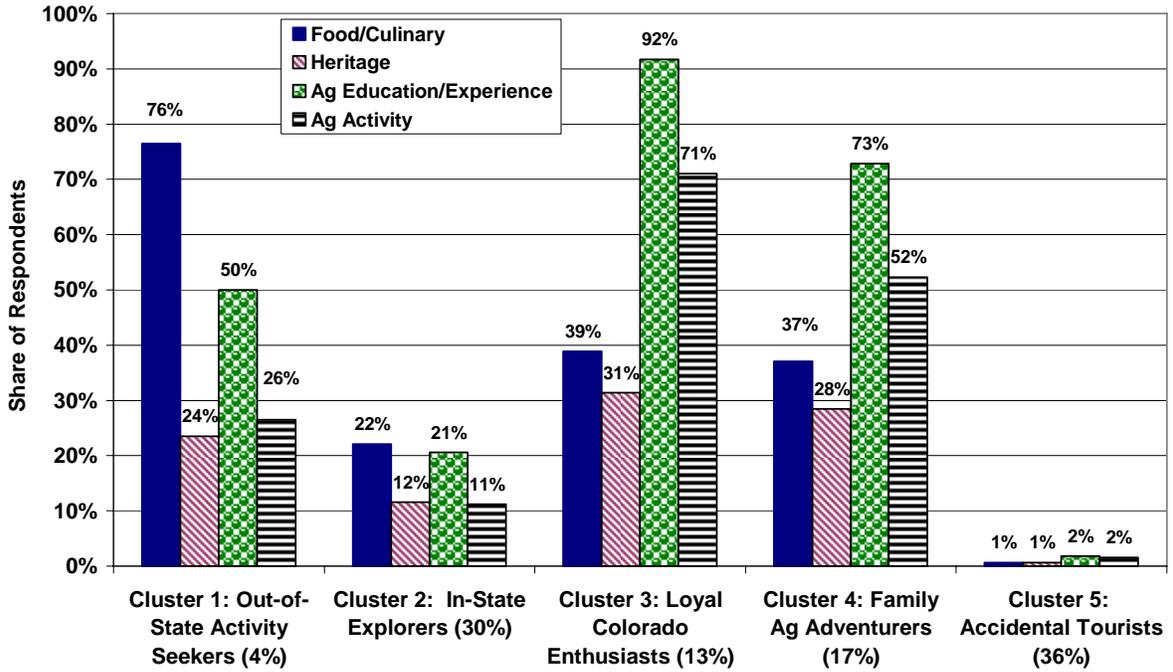
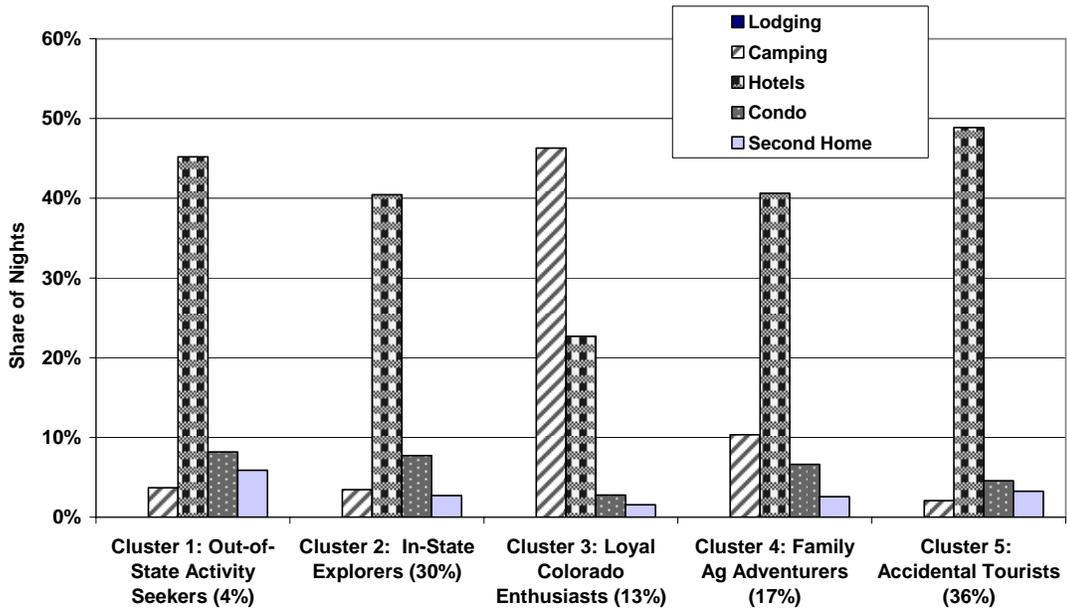


Figure 5: Lodging Choices by Share of Total Nights by Cluster, N=897



Finally, the transportation choices exhibited in Figure 6 show using a personal vehicle was, by far, the most common way to travel to and around the state, while rental cars were very important to Out-of-State Activity Seekers. Similarly, plane trips were commonly used by the Out-of-State Activity Seekers and the Accidental Tourists, consistent with the high share of out-of-state visitors in these categories. Other forms of transportation (including tour buses, borrowed cars and public transportation) were less frequently used. This indicates that most travelers should have some flexibility in their travel itinerary to incorporate activities that they discover during their trip, given that they control the mode of transportation. This flexibility is especially relevant for Family Ag Adventurers who are already inclined to participate in agritourism. However, our survey results indicated that many travelers had already planned their trips and didn't have time to incorporate an additional activity, even if they wanted to do so.

Implications for Strategic Marketing and Partnerships

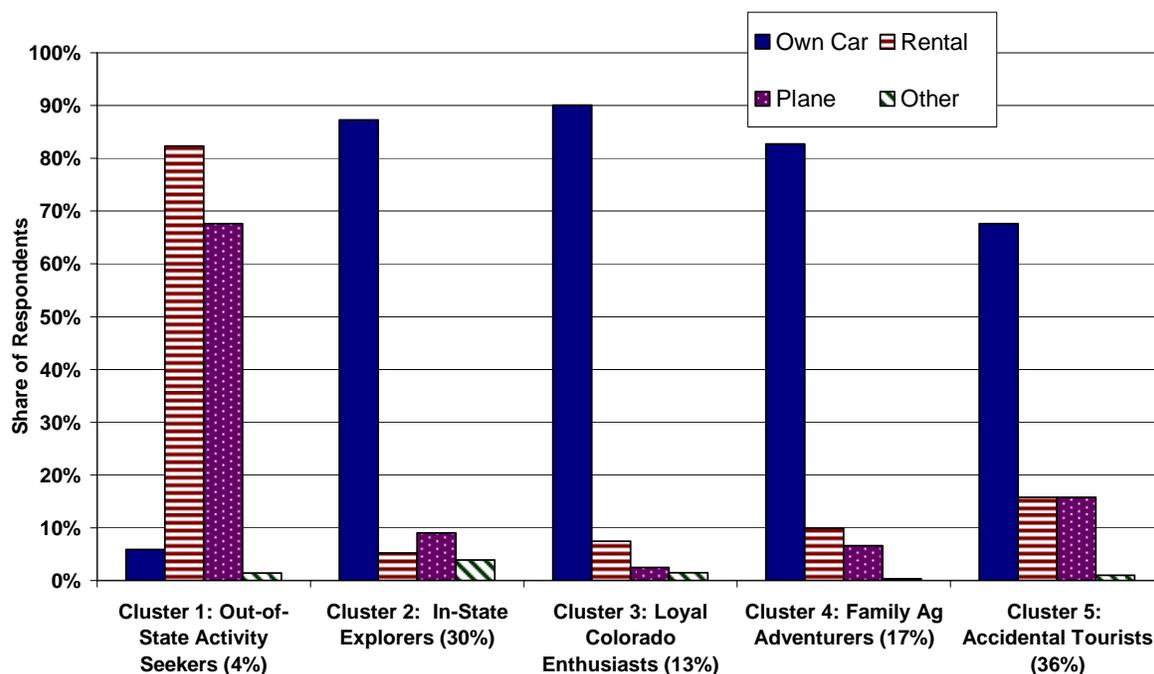
Looking at overall travel behavior and agritourism interest among different types of travelers provides important insights into market potential, effective promotions and relevant partnering an operator or

community might consider to enhance agritourism opportunities. For example, identifying these consumer clusters shows that, while 17% of all visitors did some planned agritourism activities on their last trip to Colorado, another 23% of all visitors participated in unplanned agritourism. This shows that there are untapped opportunities to reach these consumers through the information channels they rely on the most to plan their trips, and by promoting activities in which they are most likely to participate.

Although there are some interesting trends among all visitors, perhaps the best marketing lessons can be incorporated into approaches to target specific types of travelers, including:

- ❖ The *Out-of-State Activity Seekers* are interested in unplanned agritourism activities (usually culinary) that are easy and convenient. Since these travelers don't see agritourism as a reason to travel, it is important to make good use of in-state advertising in order to capture these lightly interested visitors as agritourism participants. These travelers rely on a relatively diverse set of resources to plan trips, including Web searches, past experience, travel associations, park brochures and Welcome Centers. To target this group that also engages

Figure 6: Transportation Used During Colorado Trip
by Cluster, n=897



in relatively more educational and nature-based activities agritourism, operators should explore co-promoting with culinary operations, which appeal most to this consumer segment. The Out-of-State Activity Seekers were the only segment who made a significant use of condos or second homes, so they must be considered as a market to nurture since they take the longest trips and may have the fewest time constraints while in Colorado. One-fourth plan to travel to Colorado in the coming year and could be effectively targeted with good materials shared by Web site or through travel industry partners (AAA, timeshare companies, AARP) or destination partners (such as state and national park visitor centers and Welcome Centers).

❖ The *In-State Explorers*, also inclined to participate in unplanned agritourism activities, rely on past experiences and recommendations from friends and family to influence their participation in agritourism. Since they drive their own cars around the state, they have the liberty to explore agritourism at their leisure. Therefore, local advertising will help increase their participation in culinary, educational and nature-based on-farm experiences. Although this group might be hard to target for agritourism, they do travel frequently and are upper-middle income households that seem open to agritourism experiences on the spur of the moment. Furthermore, since they anchor on good past experiences, there is some rationale in “gaining access” to this set of travelers through savvy marketing and promotional investments, especially promotions that advertise a more diverse set of available activities in which they might participate (such as sporting events or heritage sites).

❖ The *Loyal Colorado Enthusiasts* are just that: loyal. This cluster has the highest participation in primary agritourism and actively seeks more agritourism opportunities. Offering new agritourism activities and or clusters of activities would interest this group. They plan to participate in a diverse set of agritourism activities and report more visits to agritourism enterprises relative to two years earlier. Most of their trip planning is based on past experiences and personal web searches so they tailor their trips specifically to their interests. They simply need operators and communities to get them the information they need to plan their travels.

❖ Since the *Family Ag Adventurers* are willing to visit local enterprises, and travel long distances to reach a variety of agritourism destinations, they are a great market opportunity. This cluster is usually made up of family units with children who are interested in fun, educational activities. Providing easy planning access (mainly through recommendations and web-based searches) will improve participation in agritourism activities. Although 25% plan ahead, Family Ag Adventurers also participate in unplanned agritourism activities, so good experiences may encourage them to incorporate more agritourism destinations into future trip plans. In short, their interests are quite diverse!! Although they gravitate toward educational and nature-based on-farm experiences, they also enjoy more active farm and ranch activities and culinary experiences. Survey results showed that about half of their activities took place in Colorado, but these appear to be during big family vacations, so they do not have plans to visit again in the next several years. Still, attracting these travel parties is a worthwhile pursuit for any agritourism operator or community.

❖ Finally, the *Accidental Tourists* are the hardest group to target. Since most of their traveling appears to be for non-recreational reasons, there may not be much time for outside activities. In order to capture a portion of this market, it will be important to advertise in hotels and airports where these travelers can learn about agritourism as they do other things (like wait in airport security lines or at the hotel desk for check-in). While this group is only in the state for a few days with small windows of time for leisure (for which they may not have planned), they may look for activities to occupy their free time. However, these activities need to be well-promoted, local, and easily accessed due to the limited amount of time they spend in-state.

An overarching theme of any marketing plan should be how travelers will “find” your operation or tourism region in a timely manner. Since many activities based on-farms or ranches require advance trip planning such as purchasing hunting or fishing licenses, securing access to a recreational area, and either bringing or buying/renting recreational equipment, unplanned visits are not even an option. Therefore, visitors can rarely engage in those activities spontaneously, and agritourism operators promoting these types of businesses need to create a promotional strategy

that attracts the attention of travelers at the time they are buying tickets, making reservations or coordinating with friends and family. In summary, relatively small, well-targeted investments in agritourism promotion could yield large returns for entrepreneurs and communities across Colorado and create a large field of repeat visitors.

Partnerships with other travel-related organizations are key to increasing the success of Colorado's agritourism sector. Overall, only 9% of all those traveling to Colorado used Colorado Tourism Office materials when

planning their trips. However, the consumer segments most likely to participate in agritourism, were more likely to use CTO for information: Loyal Colorado Enthusiasts and Family Ag Adventurers (as well as Out-of-State Activity Seekers). For agritourism operators looking to leverage scarce advertising resources, investments in a functional, informative Web site, and promotion through state Welcome Centers, park brochures and travel associations will target the greatest number of interested consumer segments and engage both the planner and the spontaneous traveler.