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Western Nebraska Visitors Survey September, 2005 – August, 2006

Prepared by
The Western Nebraska Tourism Coalition,
The University of Nebraska-Lincoln Rural Initiative
and
University of Nebraska-Lincoln Extension

Introduction

During the months of September, 2005 through August, 2006 the Western Nebraska Tourism Coalition, the University of Nebraska-Lincoln Rural Initiative and University of Nebraska-Lincoln Extension conducted a survey of visitors to 16 counties in Western Nebraska.

The survey was designed to provide information related to the activities and experiences of tourists and other visitors to Western Nebraska, especially as related to the hospitality industry.

Survey Design

Survey crews were assigned to locations where Western Nebraska visitors are known to congregate. Crews were instructed to approach individuals at each venue with a very brief checklist designed to determine if the individual was a Western Nebraska resident or an out-of-town visitor. Non-residents were asked if they were willing to complete a questionnaire related to their Western Nebraska visit. Those who agreed to complete the survey were given copies of an explanatory letter, the survey instrument, and a pre-addressed, stamped envelope. Surveys were to be returned to the Western Nebraska Tourism Coalition for analysis.

The investigators set a goal of 100 completed surveys each of the two participating regions: Sandhills and Wild West. The process in fact netted 204 useable surveys (94 from the Sandhills and 110 from the Wild West), representing nearly 1,075 total visitors (a total which includes several large tour groups).

Limitations of the Data

Visitor surveys differ from other forms of survey research in that it is impossible for the investigators to identify all of the members of the potential study population, and it is therefore impossible to draw a true random sample to poll. For this study, the investigators chose to address this problem by sampling locations and times and polling visitors who happened to be at a particular venue at a particular time.

While the 204 respondents do indeed provide us with valuable information regarding the experiences and perceptions of visitors to Western Nebraska, the fact that we do not know the actual size of the study population means that we cannot properly place confidence intervals around their responses. That is, it is not possible for us to say that X% of all visitors (plus or minus some level of statistical confidence) have a given opinion or characteristic based upon what we know of the opinions and characteristics of the study group.

The reader should interpret the results of this study with the above statistical limitations in mind.

Characteristics of the Respondents

- The survey returned 204 useable questionnaires, representing 1,075 total visitors (697 when tour groups of 20 or more are excluded).
- Surveys were most often completed by female visitors (58.1%).
- Respondents ranged in age from 19 to 90-years. The median age of the respondent group was 54-years, and the modal age was 55 to 57-years (24 respondents).
- Respondents most often characterized their household as being a couple with grown children (47.7%).
- The next most common household description was that of a two-parent family with children (30.6%).
- Single parents, single persons, and others were represented, but in much smaller numbers (all under 10%).
- Respondents came from 32 states and two foreign countries (Australia and the UK).
- Respondents most often indicated that their state of residence was Nebraska (40.2%). Only 17 (20.8%) of the responding Nebraska residents were from state's two largest cities of Lincoln and Omaha.
- The next most common state of residence was Colorado (18.6%). No other state was home to more than 4% of those responding.
- Respondents were in general well educated, with 46.1% reporting that they had obtained a four-year college degree or beyond. No adult respondent reported having not completed high school.
- Respondents reported a range of household income levels. This is often seen as a personal or sensitive question, and 42 respondents (20.6%) chose not to answer it. Of those who did respond, 24% reported incomes of over \$90,000. This was in fact the most commonly reported income level. The next most commonly reported income level was between \$55,000 and \$75,000 (21%). Only 9.9% of respondents reported incomes below \$25,000.

Characteristics of the Western Nebraska Visits

- For 76.5% of those responding, Western Nebraska was their primary destination.
- Respondents most often indicated that their reason for being in Western Nebraska was "outdoor recreation" (23.5%)

- Other commonly cited reasons for visiting Western Nebraska were “festivals or events” (21.9%), “touring” (21.4%) and “general leisure” (12.8%).
- “Visiting friends or relatives” brought 9.2% of those responding to the region.
- Respondents were most often traveling with one other person (38.8%), or in a group of three (12.4%) or four (12.9%).
- Respondents reported being part of a tour group of more than six people 13% of the time (no single group provided more than one respondent).
- When group size is limited to six or fewer, the average group size was 2.9 persons.
- Respondents reported traveling with children age 12-years or younger 27.5% of the time.
- Respondents reported traveling with teen age children 22.1% of the time.
- Respondents reported traveling with college age persons (18 – 25 years) 14.2% of the time.
- Respondents reported traveling with persons over 70-years of age 11.8% of the time.
- The majority of those responding (90%) planned to stay in Western Nebraska through at least one night.
- On average, respondents were spending 10 nights away from home, and 4.2 of those nights were being spent in Western Nebraska.
- Of those planning to spend the night, 85.5% planned on two or more nights.
- Of those respondents who were spending the night, 39% planned to spend at least one night in a hotel or motel, 23% in an RV, 19% in a cabin or resort, 17% in a tent and 14% with friends or relatives.
- Respondents indicated that the weather was good to excellent for their visit 79.2% of the time. Only 5% of those responding indicated that the weather had been not good or poor.

Reasons for Selecting Lodging

Visitors who were spending the night in Western Nebraska were asked what lodging attributes influenced their choice of accommodations. The responses were quite varied, with price considerations topping the list of important attributes.

- A good value for the price was identified as important or very important by 92.7% of the respondents.
- An “economy price” was identified as important or very important by 78.1% of those responding.

- A nature setting was identified as important or very important by 70% of the respondents.
- A unique experience was identified as being either important or very important to the lodging choice of 69.6% of those responding to this question.
- Daily (as opposed to weekly or monthly) rates were identified as important or very important by 64.1% of those responding.
- Location on a lake or river was seen as important or very important by 60.5% of those responding.
- Other considerations identified as important or very important in the respondents' lodging selection by more than 30% of those responding were: Biking and hiking access (39.5%), cable television (37.3%), historical or architectural significance (36.9%) and "lots" for kids to do (30.7%).
- Of those responding, 77% indicated that some other consideration was either important or very important in their lodging selection. Those who specified what that consideration was provided a variety of characteristics, including such things as ATV trails, cell phone reception, continental breakfast and pet friendliness.

See Table 1 for a complete listing of reasons for selecting specific lodging.

Visitor Spending

- Total estimated spending for the 187 parties that provided a spending estimate was \$97,308. For those parties, respondents estimated average expenditures of \$520 during their visit to Western Nebraska. When tour groups of 7 or larger were excluded, respondents estimated expenditures of \$387 per party.

Excluding large groups, respondents estimated average *total party daily expenditures* of:

- \$70 for bars and restaurants
- \$71 for transportation (including fuel)
- \$67 for shopping
- \$44 for groceries
- \$60 for recreation fees, equipment and attractions

On a per-visitor basis, overnight guests estimated their expenditures to be roughly 20% greater than that of single day visitors.

Overnight visitors estimated that they spent approximately \$108 total, excluding lodging. Day visitors were estimated to spend approximately \$90 per person while in Western Nebraska.

Table 1

| Reasons for Selecting Specific Lodging | | |
|--|-------------------|---|
| Reason | Number Responding | Percent Indicating Important/Very Important |
| On Lake or River | 134 | 60.5 |
| Near Friends/Relatives | 126 | 20.6 |
| Biking/Hiking Trail Access | 129 | 39.5 |
| Daily Rental Rates | 131 | 64.1 |
| Golf Course | 128 | 10.2 |
| Cable TV | 134 | 37.3 |
| Historical/Architectural Significance | 130 | 36.9 |
| Organized Kids Programs | 127 | 11.8 |
| Indoor Pool | 135 | 28.1 |
| Lots for Kids to Do | 127 | 30.7 |
| Recognized Brand/Chain | 130 | 22.3 |
| Economy Price | 137 | 78.1 |
| Outdoor Pool | 129 | 24.8 |
| Good Value for Price | 138 | 92.7 |
| Offers Luxury/Full Service | 122 | 26.2 |
| Unique Experience | 121 | 68.6 |
| Nature Setting | 127 | 70.0 |
| Restaurant on Premises | 122 | 33.6 |
| Previous Stay | 122 | 33.6 |
| n=179 overnight visitors | | |

Planning in Advance

- Respondents who made lodging reservations did so 35-days prior to their visit, on average.
- Among responding overnight visitors, a sizeable number (29.5%) made lodging reservations 24-hours or less before their stay, or sought lodging upon their arrival.

Return Visitors

- The majority of survey respondents (77.2%) were repeat visitors, indicating that they had visited Western Nebraska on one or more previous occasions. The median number of visits was 6.
- A small number of the repeat visitor group (10.4%) indicated that they are regular visitors, having visited Western Nebraska 20 times or more over the last 5 years.
- Another 25.6% of repeat visitors indicated that they were in Western Nebraska once or twice a year (between 5 and 10 visits over the last five years).

- Very occasional repeat visitors (less than annual) made up 50.4% of the repeat visitor population.
- Among repeat visitors, two-thirds (67.5%) reported 10-year or longer histories of visiting the region, while 13.5% of the repeat visitors responding have been coming to Western Nebraska for three or fewer years. The median length of visitor histories was 16 years.
- Among repeat visitors, 40.5% reported having made 10 or more lifetime trips to Western Nebraska.

Perceptions of Return Visitors

Respondents were asked to identify changes that they perceived as having occurred in Western Nebraska in the time that they have known it.

- The majority (55.6%) of respondents indicated that the overall Western Nebraska visitor experience has improved, while 41.4% felt that the overall experience was unchanged.
- Only a small number (3%) felt that the overall visitor experience had declined.
- Similar results were found for most of the individual items listed for evaluation. Most commonly seen as “improved” were lodging quality (56.4%), recreational opportunities (49.3%), access (43.5%) and attraction opportunities (43.1%).

Table 2

| Perceptions of Repeat Visitors | | |
|--------------------------------|-------------------|--------------------------------|
| Experience | Number Responding | Percent Indicating Improvement |
| Overall Visitor Experience | 138 | 55.6 |
| Lodging Quality | 133 | 56.4 |
| Hospitality/Service | 135 | 51.1 |
| Recreational Opportunities | 141 | 49.3 |
| Overall Conditions | 138 | 43.5 |
| Attraction Opportunities | 130 | 43.1 |
| Shopping Opportunities | 130 | 39.2 |
| Restaurant Selection | 133 | 39.1 |
| General Attractiveness | 138 | 37.8 |
| Natural Environment | 141 | 27.0 |
| n=157 return visitors | | |

- Only in the area of natural environment did as much as 10% of the respondent population perceive decline. While 10.6% of those responding indicated having observed a decline in this area, 27% indicated that they saw an improvement.

Importance of Regional Activities

Respondents were asked to rate 11 activities as to their importance in that party's experience of Western Nebraska. Those responding were interested in a variety of experiences. Among the items most often rated as important or very important to the Western Nebraska experience were sight seeing (66.7%), camping (54.4%), dining out (47.6%) and hiking or walking (47.5%).

Table 3

| Activities that Affect the Western Nebraska Experience | | |
|--|-------------------|---|
| Activity | Number Responding | Percent Indicating Important/Very Important |
| Sight Seeing | 163 | 66.9 |
| Camping | 160 | 54.4 |
| Dining Out | 168 | 47.6 |
| Hiking/Walking | 160 | 47.5 |
| Water Sports | 149 | 44.3 |
| Fairs/Events/Festivals | 166 | 38.0 |
| Fishing | 153 | 36.6 |
| Shopping | 163 | 27.0 |
| Horseback Riding | 148 | 14.9 |
| Mountain Biking | 149 | 10.1 |
| Hunting | 142 | 9.2 |

n=204 Visitors

Rating of Community Attributes

Respondents were also asked to rate their experience of 10 Western Nebraska attributes and amenities (*IF* that attribute or amenity had in fact been part of their experience).

In general, respondents appeared to be quite satisfied with their Western Nebraska experience, with the majority rating all of the regional characteristics queried as being above average or excellent. In no instance did more than three respondents rate any part of their experience as "poor."

Table 4

| Rating of Western Nebraska Regional Attributes |
|--|
|--|

| Attribute | Number Responding | Percent Indicating Above Average/Excellent |
|-----------------------------------|-------------------|--|
| Local Hospitality | 167 | 80.2 |
| Family Fun | 145 | 75.9 |
| Condition of Attractions/Features | 158 | 75.3 |
| Availability of Info/Directions | 162 | 73.5 |
| Lots to Do and See | 163 | 70.6 |
| Overall Quality of Recreation | 152 | 70.4 |
| Reasonable Prices | 168 | 68.5 |
| Services/Facilities | 155 | 66.7 |
| Quality of Hotel/Motel | 105 | 60.2 |
| Quality of Restaurants/Cafes | 143 | 58.7 |

n=204 Visitors

Planning to Return

- Nearly all (91.3%) of respondents indicated that it was likely or certain that they would return to Western Nebraska.
- Of the respondents who indicated that they would return, 32.2% felt that they would do so within the year, and 85.3% within two-years.
- The most popular season for hypothetical visits was summer. More than 8 in 10 (83.1%) of those interested in returning indicated that they would be interested or very interested in a summer visit.
- Respondents also indicated that they would be interested or very interested in returning in the fall (75.9%), spring (69.2%) and winter (38.2%).

Learning about Western Nebraska

Respondents were asked what information resources helped them to become aware of Western Nebraska.

- A previous visit or visits was the most frequently identified method of learning about Western Nebraska. Respondents indicated that such experience was important or very important to creating awareness of the community 68% of the time.
- Information or recommendations received from friends or relatives was reported as being important or very important in creating awareness of Western Nebraska 58% of the time.\
- The nine information sources offered and the proportion of respondents indicating that they were either *important or very important* to creating awareness of Western Nebraska are listed in Table 5.

Table 5

| Factors in Creating Awareness of Western Nebraska | |
|---|---|
| Factor | Percent Indicating Important/Very Important |
| Previous Visits | 68.0 |
| Friends/Relatives | 58.3 |
| State Tourism Organization | 55.8 |
| Internet | 53.3 |
| Area Chamber | 50.3 |
| Articles/Stories | 48.1 |
| Newspaper Ads | 31.4 |
| Radio/TV Ads | 15.3 |
| Sports Show | 12.3 |
| Valid responses = 128 to 163 Visitors | |

- When asked if they were interested in receiving information and updates about Western Nebraska through electronic mail, half (50.5%) of respondents indicated that they were.
- Of those who indicated that they were interested in such information and updates, 77.3% felt that it should be provided by a single organization or source.
- When asked if they would like to receive specific kinds of information about activities and opportunities in Western Nebraska, more people indicated an interest. The information items listed and the proportion of respondents interested in receiving such information are listed in Table 6.

Table 6

| Interest in Receiving Specific Information | |
|--|-----------------------------|
| Information Type | Percent Indicating Interest |
| Lodging Specials | 21.6 |
| Festivals | 20.6 |
| Area Conditions | 19.1 |
| Autumn Lodging | 13.7 |
| Lodging Vacancy | 11.8 |
| Shopping/Sales | 6.4 |
| Golf | 2.9 |
| n=204 Visitors | |

Planning Their Trip to Western Nebraska

Respondents were asked to rate the importance of the same nine-information resources in planning this particular trip to Western Nebraska. Previous visits and information received from

friends and relatives continued to be the items most often identified as important or very important. In addition, the Internet was indicated as an important resource in planning their visit by more than half of those responding.

Information sources rated as *important or very important* to plans for their current trip appear in Table 7.

Table 7

| Factors in Planning Visit to Western Nebraska | |
|---|---|
| Factor | Percent Indicating Important/Very Important |
| Previous Visits | 72.7 |
| Friends/Relatives | 54.0 |
| Internet | 53.6 |
| State Tourism Organization | 49.3 |
| Area Chamber | 47.8 |
| Articles/Stories | 44.2 |
| Newspaper Ads | 33.6 |
| Radio/TV Ads | 20.1 |
| Sports Show | 10.2 |
| Valid responses = 128 to 163 Visitors | |

These data suggest that the most productive time to provide information regarding Western Nebraska to people is while they are there. However, to reach the maximum number of potential visitors, a broad and balanced marketing scheme will be required.

Western Nebraska’s Appeal to Others

Respondents were asked to estimate how appealing Western Nebraska might be to various types of visitors.

- The majority of respondents felt that Western Nebraska would be seen as appealing or greatly appealing by an array of audiences.
- Western Nebraska was seen as being particularly appealing to men (87.4%) and especially to “sportsmen” (91.4%).
- The extent to which the respondents saw Western Nebraska as being *appealing or very appealing* to various types of visitors is found in Table 8.

Table 8

| Groups to Which Western Nebraska Would Appeal | |
|---|--------------------|
| Group | Percent Indicating |

| Appealing or Greatly Appealing | |
|--------------------------------|------|
| Sportsmen | 91.4 |
| Men | 87.4 |
| People Similar to Self | 86.5 |
| Couples without Children | 81.8 |
| Seniors | 71.3 |
| Children | 68.3 |
| Women | 65.5 |
| College Students | 61.8 |
| Young Professionals | 51.2 |
| n=204 Visitors | |

Visits to Specific Sites

Respondents were offered a list of 43 Western Nebraska attractions, and asked to indicate if they had visited those attractions, when they decided to include the specific attraction in their itinerary, and how much time they spent at that site. 150 respondents answered one or more of these questions.

Note that these data are heavily influenced by where the survey instrument was distributed, and should be interpreted somewhat cautiously.

The actual number of area attractions visited was in fact greater than 43, because both a generic option of “Fair, Event or Festival” and an “Other” category were included in the listing.

Respondents indicated 410 visits to listed attractions, and each of the 43 listed sites generated at least one visit. This equates to an average of 2.7 attraction visits per respondent. Assuming that the 54 visitors who did not answer these questions did not in fact visit any of the listed attractions, the average Western Nebraska Visitor spends time at just over two of the area’s attractions.

Of those responding, 42% indicated that they had visited only one site. For those indicating that they had visited multiple attractions, the average number of visits was 3.9.

The most frequently visited sites were the Niobrara Scenic River (visited by 39 respondents), Lake McConaughy (37), Fort Niobrara Wildlife Refuge (35), Smith Falls State Park (34), Merritt Reservoir State Recreation Area (26), and Front Street (20). In total, 13 of the 45 sites had been visited by 10 or more of the respondents. A complete listing of the attractions visited appears in Table 9.

The length of visits to specific sites ranged from less than an hour at smaller attractions such as county museums to several days at larger attractions such as state parks. A listing of attractions with average visits of two hours or longer appears in Table 10.

Deciding to Visit a Specific Site

The most common time for respondents to have made the decision to visit a specific Western Nebraska attraction was after they had arrived in Western Nebraska.

Respondents who indicated that they had made a visit to a specific Western Nebraska attraction also indicated that they made the decision to do so before beginning their trip 45% of the time, after arriving in Western Nebraska 47% of the time, and while in route to Western Nebraska 8% of the time.

The tendency of visitors to make itinerary decisions after arriving in the region again suggests the importance of communicating with visitors while they are here.

Table 9
Reported Visits to Specific Western Nebraska Sites

| Site | Number of Visits Reporte d |
|------------------------------------|-------------------------------------|
| Niobrara Scenic River | 39 |
| Lake McConaughy | 37 |
| Fort Niobrara Wildlife Refuge | 35 |
| Smith Falls State Park | 34 |
| Merrit Reservoir State Rec Area | 26 |
| Front Street | 20 |
| Boot Hill | 19 |
| Cabela's Retail Store & Exhibit | 15 |
| Snake River Falls | 15 |
| Other Attraction | 19 |
| Fair Event/Festival | 19 |
| Petrified Wood Gallery | 12 |
| Mansion on the Hill | 10 |
| Buffalo Bill State Historical Park | 8 |
| Highest Point Panorama | 8 |
| Kingsley Dam & Hydro Plant | 8 |
| Ole's Big Game Steakhouse & Lounge | 8 |
| Fort McPherson Cemetery | 6 |
| Lake Maloney | 6 |
| Little Church of Keystone | 5 |
| Fort Sydney Post Commanders Home | 4 |
| Rail Road Museum | 4 |
| Tri State Marker | 4 |
| Lodgepole Depot Museum | 4 |
| Eagle Viewing | 4 |
| Carhenge | 4 |
| Bergstrom Rock and Gem Collection | 3 |
| Lincoln County Museum | 3 |
| Union Pacific Bailey Yard | 3 |
| Sioux Army Depot | 3 |
| Sandhills Museum | 3 |
| Crescent Lake Wildlife Refuge | 3 |
| Smith Lake Wildlife Area | 3 |
| Plains Historical Museum | 2 |
| California Hill Historical Marker | 2 |
| Grave of Old Jules Sandoz | 2 |
| Box Butte Reservoir | 2 |
| Sallows Conservatory and Arboretum | 2 |
| Carnegie Arts Center | 2 |
| Banner County Historical Museum | 1 |
| Sudman-Neuman Heritage House | 1 |
| Oliver Reservoir State Rec Area | 1 |
| Knight Museum | 1 |
| Total Visits Reported | 410 |

Table 10
Average Time Spent at Western Nebraska Attractions

| Site | Average Reported Hours |
|---------------------------------|---------------------------------------|
| Merrit Reservoir State Rec Area | 64.7 |
| Fair/Event/Festival | 56.5 |
| Lake McConaughy | 39.5 |
| Lake Maloney | 22.2 |
| Other Attraction | 16.3 |
| Fair/Event/Festival | 14.0 |
| Smith Falls State Park | 11.5 |
| Niobrara Scenic River | 8.5 |
| Knight Museum | 5.0 |
| Fort Niobrara Wildlife Refuge | 2.5 |
| Cabela's Retail Store & Exhibit | 2.1 |
| Box Butte Reservoir | 2.0 |
| Smith Lake Wildlife Area | 2.0 |
| Carnegie Arts Center | 2.0 |