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## Adult volunteers at heritage tourism sites: A study of characteristics and motivations.

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ADULT VOLUNTEERS AT HERITAGE TOURISM SITES:  
A STUDY OF CHARACTERISTICS AND MOTIVATIONS

by Christine M. Babka

A Thesis submitted to the  
Davis College of Agriculture, Forestry, and  
Consumer Sciences  
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in Partial Fulfillment of the Requirements  
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in  
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Recreation, Parks, and Tourism Resources

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2003

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Satisfaction, Benefits, Constraints, Facilitators,  
Demographics, Volunteer Management

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## ABSTRACT

### ADULT VOLUNTEERS AT HERITAGE TOURISM SITES: A STUDY OF CHARACTERISTICS AND MOTIVATIONS

Christine M. Babka

One hundred fifty-eight adult volunteers aged 18 and older at 17 heritage tourism sites in northern West Virginia and southwestern Pennsylvania completed a paper questionnaire during summer 2003. The data was analyzed to identify basic volunteer characteristics and motivations, benefits, constraints and facilitators, social implications, activity and place attachment and the levels of satisfaction, commitment and interest and participation in heritage information. This research produced a 27-item heritage tourism volunteer motivation model and other measurement tools that followed previous research literature methods including the Volunteer Function Inventory (VFI). Common themes for heritage tourism volunteers are altruistic, self-improvement, social, self-interest and site-related. This research is useful for volunteer recruitment and retention programs.

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## CHAPTER 1-INTRODUCTION

### Background

This study was a descriptive nonrandom research investigation of the characteristics and motivations of adult volunteers at heritage tourism sites in southwestern Pennsylvania and northern West Virginia. Special emphasis was on persons aged 50 and older. Additional parameters relating to volunteers were also investigated.

No recreation program can enlist a professional staff to do everything possible in every setting or with every group calling for service (Kelly, 1996, p. 316). The enlistment of voluntary leadership becomes a necessity. Identifying volunteers' motives is key to understanding why they start volunteering; how to energize them and sustain their enthusiasm; how to supervise, place, and reward them; and why they quit (Crompton, 1999, p. 345). A heritage tourism volunteer who participated in this research commented on the variety of possible volunteer motivations:

People who invest significant time to volunteer at a site do so for a wide variety of reasons, from strong personal interest to ego and social status. The reason is largely unimportant, but leadership and fellow volunteers must not lose sight of the importance of seeing that volunteers get satisfaction from their

service no matter their motivation, and of avoiding conflicts among volunteers that can erupt because of the diversity of motivations.

Older Americans comprise the most rapidly growing segment in the United States (Edginton, Jordan, Degraaf & Edginton, 2002; Gerber, Wolff, Klores & Brown, 1989; Kelly, 1996; Tarlow, 2002). Data shows that older Americans are one of the largest and fastest growing groups of volunteers at nonprofit organizations (Edginton et al., 2002; Gerber et al., 1989; and Independent Sector, 1999) and they have an interest in educational tourism opportunities and heritage tourism in particular (Gerber et al., 1989). Half of all Americans volunteer in the nonprofit sector, making nonprofits this country's largest "employer" (Mackin, 1998).

Kelly (1996) says that feelings of competence, social esteem, and community acceptance can be derived from leisure roles before and during retirement (p. 65). Vaillant (2002) who studied three cohort groups in the longest prospective study of physical and mental health in the world (i.e., the Harvard Study of Adult Development) says that there are four basic activities that make retirement rewarding: Retirees must replace their work mates with another social network, must rediscover how to

play, be creative and should continue lifelong learning (p. 224). Kelly (1996) confirms this sentiment:

...there is increasing evidence that those who are most satisfied in their later years are those who are regularly engaged in activity outside the home, especially activity that provides challenge and a context of social integration. Older persons want to continue to demonstrate that they are persons of worth and competence. As a result, they are attracted to activities with high levels of quality and opportunity for effective action (p. 66).

There is little research about heritage tourism in general or specifically about older volunteers at heritage tourism sites. Little research has been done to investigate the motives for participation of older adults in leisure involvement (Seigenthaler, 1996). Knowing volunteer motivations and benefits can help tourism organizations better plan and organize their staffing needs. The older volunteers may gain educational, social and other intrinsic benefits that may help them continue a psychologically healthy life in their later years and provide an avenue for the individual to give back to society.

### *Travel and Tourism*

Travel ranks as the second largest retail industry in the United States, and the second largest private employer (Edginton et al., 2002). The American tourist industry employs some 18 million people with a payroll of more than \$160 billion (Tarlow, 2002). In 1997, the global travel industry was a \$467 billion dollar enterprise (Hayes, 1997) and world travel accounted for 11.7 percent of the world Gross Domestic Product (GDP) (Edginton et al., 2002). In 2002, travel expenditures were estimated to be \$453 billion, down after September 11, 2002 (West Virginia Division of Tourism, 2002a). In 1999, travel and tourism ranked among the top three economic activities in thirty-two states (Edginton et al., 2002).

Kelly (1996) defines tourism as travel requiring an overnight stay or as travel of more than 100 miles (p. 281). Over 660 million trips are made a year in the U.S. and more than 120 million people in the U.S. take at least one trip lasting ten days or more each year (Kelly, 1996). In 2002, auto travel continued to rise, but people spent less time away with the U.S. length of stay dropping to 3.77 days (West Virginia Division of Tourism, 2002a).

Based on 1999 United States Census data, approximately \$2.2 billion is expended yearly at the federal level for

parks and recreation in the United States (Edginton et al., 2002). Collectively, the states spent more than \$3.0 billion for park and recreation services (Edginton et al., 2002). From 1991 to 1997, visitors to 4,451 state parks increased from 737 million visitors to 783 million visitors; these visits generated \$454 million to more than \$590 million in revenues (Edginton et al., 2002).

Pennsylvania ranked 11<sup>th</sup> of the top 15 largest state park systems in the United States with 34.4 million visitors based on 1999 U.S. Census data (Edginton et al., 2002). West Virginia had 21.3 million visitors in 2000 (West Virginia Division of Tourism, 2002b) and showed a four percent increase in visitors, an 11 percent increase in day visitors and a 9 percent increase in leisure travel in 2001 (West Virginia Division of Tourism, 2002a).

#### *Heritage Tourism*

Heritage tourism is a growing segment of the tourism marketplace (Confer & Kerstetter, 2000; Dickenson, 1996; Hayes, 1997; Kerstetter, Confer, & Graefe, 2001; Russell & McLean, Ed., 2000). Between 1991 and 1995 interest in heritage tourism increased 16 percent (Confer & Kerstetter, 2000; Kerstetter, Confer, & Graefe, 2001). Following the trends, more people came to West Virginia in 2002 to enjoy nature and heritage sites as well as spending time with

family (West Virginia Division of Tourism, 2002a).

Nonprofit associations related to cultural leisure numbered 1,886 in 1990 and 1,918 in 1997. Nonprofit associations related to patriotic leisure numbered 281 in 1985 and 745 in 1997 (Edginton et al., 2002)

Based on 1999 United States Census data, National Park Service (NPS) annual expenditures during 1995 and 1997 increased from \$135.2 million to \$158.5 million while total recreation visits to all NPS sites increased from 263.4 million to 275.3 million. Annual expenditures at NPS historical sites alone during the period 1995 to 1997 increased from \$61.9 to \$63.0 million (Edginton et al., 2002).

Forty-five percent of U.S. adults planning a pleasure trip in spring 1996 said they intended to visit a historic site on vacation (Dickenson, 1996). According to the Travel Industry Association of America (TIA), the national nonprofit organization that represents the travel industry, more than one-fourth of all U.S. adults (54 million) visited a museum, historical site or battlefield in 1996 and in 1999 (Confer & Kerstetter, 2000; Hayes, 1997). Forty-one percent of U.S. leisure travelers had planned to visit a cultural site in 1996 (Dickenson, 1996). The Travel Industry Association of America found 33 million U.S.

adults attended a cultural event, such as theater, arts, music, ethnic or heritage festival, in that same year (Hayes, 1997).

In response to these trends, state and city cultural ventures are proliferating. In a late 1996 survey of city convention and visitor's bureau heads and state tourism directors conducted by the U.S. Department of Commerce, almost 93 percent of respondents had developed some products or services to promote multicultural tourism in their area. The U.S. Department of Commerce's Tourism Industries Office also earmarked multicultural tourism as its major initiative in 1997 (Hayes, 1997).

In addition to a number of magazines devoted to history - American Heritage, America's Civil War, Civil War Times, American History Illustrated, Early American Life, Historic Preservation, and World War II, publications such as Historic Traveler and Westsylvania magazine, a regional magazine dedicated to the history, heritage, and culture of southwestern Pennsylvania, are gaining popularity (Confer & Kerstetter, 2000). Television programs addressing history, heritage, and culture have built on this interest (Kerstetter, Confer, & Graefe, 2001).

In his review of the 1991 book: *Sacred Ground: Americans and their Battlefields* by Edward Tabor Linenthal,



Andrew Gulliford (1993) concludes "Interpretation of historic sites remains vital to a nation's identity and sense of self-worth." Pillifant (2002) says we must be careful to preserve places and processes from our past, as they hold the lessons for future generations, the values of our culture, and the qualities of our cultural landscapes.

Several people reinforced these comments after the terrorist attack of the United States on September 11, 2001. Kiernan (2001) says we need to maintain and communicate the values and national treasures that define us as Americans and a country, and Wilkinson (2002) says the attacks reaffirmed the profile of parks as venerated American symbols of freedom. Although visitation to many National Parks dropped off after September 11, strong evidence exists that the National Parks have served as places of solace, especially for local visitors (Arndt & Prasso, 2002; Daerr, 2002; Wilkinson, 2002).

In addition to the National Park System of historic sites, Congress has recognized 24 heritage areas on a national level. There are 551 state parks that are designated historic areas (Edginton et al., 2002) in addition to numerous locally designated heritage sites throughout the country.

One successful example of a locally designated site is the Path of Progress (POP) National Heritage Route which is maintained by The Southwestern Pennsylvania Heritage Preservation Commission. The Path of Progress National Heritage Route is responsible for educating visitors about the 500 miles within the Allegheny region that is home to a number of historical sites, innovative examples of American ingenuity and commerce, and rustic, yet impressive, scenes of a dominant landscape (Pillifant, 2002).

Heritage sites in West Virginia include the ongoing interpretation of railroad history at various restored rail stations and museums such as the Cass Scenic Railroad State Park and Historical Museum in Cass, and the Toy Train Museum and Joy Line Railroad in Harpers Ferry (West Virginia Division of Tourism, 2002c, 2002d).

Russell and McLean (2000) state that the development of heritage tourism has the potential for significant impact upon existing park, recreation, and tourism organizations because: (a) Heritage tourism affects more than just historical and cultural sites, (b) heritage tourists tend to have more education and income than general travelers, (c) heritage tourists tend to travel as couples or groups and are twice as likely to take group tours, (d) heritage tourists are more motivated by a search

for heritage experience than by a detailed interest in factual history, and (e) for heritage tourists, learning is more important than fun. Individuals with an interest in visiting heritage or cultural sites also tend to stay longer and spend more per trip (Kerstetter, Confer, & Graefe, 2001).

A growing trend of vacationers is traveling to learn and participate in an expanding type of tourism, sometimes called EDU-tourism. The desire to learn while on vacation is not new, but is undergoing new discovery as a popular trend (Holdnak & Holland, 1996). In her article, *Heritage tourism is hot*, Dickinson (1996) reports that travelers are showing increased interest in educational experiences while vacationing and aging baby boomers are interested in their cultural roots. Gerber et al. (1989) noted more than 2 million people over age 50 had returned to school, and Elderhostel programs, where people aged 60 and older participate in learning opportunities, were growing at a rate of 20 percent a year. One of the most widely known educational travel organizations is Smithsonian Seminars and Tours where the clients are experiential travelers who seek to increase their personal knowledge through travel. Smithsonian clients travel the globe to experience historic locations and activities (Holdnak & Holland, 1996).

Confer and Kerstetter (2000) discuss the results of a five-year visitor heritage study initiated in 1991. The study developed a visitor profile and economic impact data from individuals visiting 27 different heritage attractions along the Pennsylvania Path of Progress (POP). The results support the general profile of the heritage tourist as slightly older (average age: 48), well educated (67 percent had at least some college), and with an above-average annual income (60 percent made more than \$40,000). The study found that about one-quarter of respondents indicated an interest in culture, heritage, or ethnicity as one of their primary motives for visiting and the less experienced individuals are more interested in the educational benefits than are the tourists with more experience and more knowledge.

#### Volunteerism

An estimated 83.9 million people volunteered in 2000 and the volunteer workforce represented the equivalent of over 9 million full-time employees at a value of \$239 billion (Independent Sector, 2001). Volunteers play an integral role in many areas of leisure service providing both labor and experience, which is a substantial economic benefit (Scott, 1996). Volunteers offer an agency a means of leveraging its resources to derive more productivity

from its existing funds and personnel (Crompton, 1999). Nonprofit organizations, in particular, often rely heavily on the use of private citizen volunteers to carry out the work of the organization (Edginton et al., 2002). Crompton (1999) says that the involvement of citizens in a wide variety of recreation functions has a long tradition in that the organized recreation movement began with volunteer leadership. As budgets and subsidies are reduced, recreation managers in general, supplement their full-time staff with volunteers to maintain facilities and operations. A heritage tourism volunteer who participated in this research commented that: "Volunteers do make a difference. Volunteerism is the backbone of this country."

For many managers, the careful cultivation of a volunteer workforce is crucial. Volunteers give their time and talent by choice. Scott (1996) and Crompton (1999) say that most people enjoy helping and feel flattered when asked to provide their expertise. Asking for volunteers is a powerful factor. Sixty-three percent who were asked to volunteer in 2000, accepted. The challenges are to make them chose your organization as the recipient and stay and contribute (Scott, 1996). Crompton (1999) says that it is important to view volunteers as a means of improving the organization's quality of services and not just as a cost-

saving device or cheap labor. Ellis and Noyes (1990) say that an ultimate measure of the success of a volunteer effort is the creation of paid positions to institutionalize that response to a need. In most mature social organizations, volunteers continue to be utilized mainly as fund raisers and policy makers.

#### *Older Volunteers*

Every other adult works as a volunteer, giving an average of nearly five hours each week to one of several nonprofit organizations (Edginton et al., 2002). Kelly (1996) believes that the fifty-plus age groups will be recognized as growing markets for recreation goods and services, especially as the baby boomer generation moves into this age.

In 1965, the over-65 population stood at 18 million and is projected to be 39 million in 2010 and about 51 million in 2020. Only about 4 percent of the population in 1900, elders increased to 13 percent in 2000, and should make up close to 17 or 18 percent by the year 2020 and 20 percent by 2030. (Edginton et al., 2002; Gerber et al., 1989; Kelly, 1996). West Virginia ranks fifth in the nation in the percent of its population above age 65 and the growth in West Virginia's elderly population is predicted

to continue increasing through 2020 (Dudley, Hager, Lewis, & Reed, 1994).

Surveys showed that between 1977 and 1986, college graduates over 50 did more unpaid volunteer labor than anyone else and almost 44 percent of those between ages 50 and 74 did volunteer work (Gerber et al., 1989). Forty-three percent of seniors aged 75 and over reported a 35 percent increase in volunteering since 1995 (Independent Sector, 1999).

Robinson, Werner, and Godbey (1997) found these results on the free time and retirement of older adults:

- (a) Americans aged 65 and older (seniors) in 1995 had seven hours more of weekly free time than the elderly did in 1985, and ten hours more than in 1975;
- (b) The amount of time they spend at leisure has increased;
- (c) Seniors have 12 more hours of free time than those aged 55 to 64 and 15 more hours than those aged 18 to 54;
- (d) Older women average about 59 hours of free time per week and men average 61 hours;
- and (e) American men who reach the age of 65 can expect to live, on average, another 15 years while women who've reached age 65 can expect another 19 years.

Further, on average, about 12 of these late-life years will be relatively healthy, however, time spent on away-from-home activities drops with age.

*Volunteers at Tourism Organizations*

In 1999, about 11 percent of the total number of volunteers in the U.S. worked on arts and recreation assignments (Independent Sector, 1999). In 1996, older Americans volunteered 15.5 percent at community or neighborhood action organizations, 8.5 percent at civic organizations, 2.2 percent at recreation organizations, 3.0 percent at arts, culture and humanities organizations, and 2.8 percent at environment/conservation organizations (American Association of Retired Persons (AARP), 1996). Crompton (1999) says many senior citizens who could be involved are not asked to help because the organizations are used to relying on young people or housewives as volunteers.

Most heritage sites are non-profit organizations. Edginton et al. (2002) and Crompton (1999) identify three types of volunteers at nonprofit organizations. First are individuals who serve as members of a board of directors, commissions, or advisory groups which provide oversight governance, policy-related functions or fundraising functions. The second type assists in providing direct face-to-face leadership, coaching or general supervision to plan, carry out or support program activities. The third type assists with administrative or support functions such



as clerical, maintenance or other roles. The costs to the organizations involve the time that paid employees take to manage the volunteers. Volunteers have to be recruited, screened, interviewed, trained, fitted into positions, coordinated so that their schedules meet the agencies needs, supervised, evaluated, and recognized by an awards program (Crompton, 1999)

#### Current Research Trends

In reviewing the status of research initiated in the 40 years after the 1962 report by the Outdoor Recreation Resources Review Commission (ORRRC), Ewert, (2002) identifies three types of research needs for outdoor recreation: (a) The need for current basic statistical information is fundamental. Background data are needed to establish and maintain information on past and developing trends; (b) Fundamental research that provides information on a wide range of topics dealing with recreation values of all kinds answering questions such as-does recreation fit into the social values of our society?; and (c) One of the most urgent needs is for more knowledge about the direct benefit that individuals derive from outdoor recreation.

In their article *At the leisure research symposium, Focus on the future*, Stewart and Samdahl (2000) report comments made by attending recreation researchers and

conclude that the proportion of researchers who frame leisure studies from sociological and socio-political perspectives is continuing to build momentum. At that symposium, Tom Goodale argued that leisure studies should again instill important directives on ethics, politics and citizenship and individual responsibility to the good of the whole. Also at that symposium, Jack Kelly argued that research questions should lead to a big picture of the real world problem and we should fully integrate social contexts within our research questions.

Vaillant (2002) found that between age 30 and 45 our need for achievement declines and our need for community and affiliation increases. Kelly (1996) proposes that a value shift more directly related to leisure is the possible replacement of an ethic of extrinsic goals with one of intrinsic meanings, and then leisure may be one factor causing social change rather than simply being shaped by other factors. Kelly (1996) says "Leisure that is free and fulfilling, exciting and creative, and community-building and enriching is the "something more" in life that can be neither bought nor sold" (p. 199).

Kerstetter, Confer and Graefe (2001), Masberg and Silverman (1996) and David Listokin, a professor at the Center for Urban Policy Research at Rutgers University in

New Jersey who conducts ongoing research on consumer participation in heritage tourism and the economic impact of their spending on nearby communities (Dickenson, 1996), share the opinion that reliable data on heritage tourism are sparse. Further, McGuire (2000) said there aren't many researchers examining the leisure and aging area and proposed a national meeting of park and recreation educators to develop collaborative methods and measurement tools to study this subject.

#### Statement of the Problem

This research investigated adult volunteers at heritage tourism sites in southwestern Pennsylvania and northern West Virginia to mainly identify their sociodemographic characteristics and motivations for volunteering. Other parameters included: (a) history of volunteering, (b) level of interest in heritage tourism, (c) level of satisfaction with the heritage organization's program for managing and retaining volunteers, (d) type of benefits received, (e) original reasons for volunteering, (f) level of commitment, (g) constraints and facilitators to volunteering, (h) social consequences; and (i) attachment to activity and place. The study emphasized populations aged 50 or older. The results were analyzed to identify the significance of explanatory factors and any

inter-relationships. The research developed a model that explained the factors that affect motivations of volunteers. This information may help heritage tourism organizations better meet their organizational goals through better management and retention of their volunteer staff.

#### Research Questions

This descriptive research study included the following questions and other parameters.

Q1 What is the frequency of adult volunteering in general and in particular at heritage tourism sites? Do older adults volunteer more than other age groups?

Q2 What are the motivations of adult volunteers at heritage tourism sites?

Q3 What type of benefits do adult volunteers at heritage tourism sites experience - intrinsic or extrinsic?

Q4 What are the social and psychological benefits of adult volunteers at heritage tourism sites?

Q5 What is the level of place attachment for adult volunteers at heritage tourism sites?

Q6 What is the level of activity attachment for adult volunteers at heritage tourism sites?

Q7 What are the education levels of adult volunteers at heritage tourism sites? Are older volunteers at a higher education level than the average adult American?

Q8 What are the income levels of adult volunteers at heritage tourism sites? Are older volunteers in a higher income class than the average adult American?

Q9 What is the gender distribution of adult volunteers at heritage tourism sites? Do older women volunteer more than older men?

Q10 What is the history of volunteering of adults at heritage tourism sites? Do older volunteers have a history of volunteering for various causes and organizations throughout their lifespan?

Q11 What are the volunteering constraints or facilitators (e.g., managerial site conditions, physical mobility, transportation access, free time, personal health condition) that are important factors for involvement of adult volunteers at heritage tourism sites?

Q12 What is the level of satisfaction felt by adult volunteers at heritage tourism sites with the volunteer recruitment and retention methods?

The subjects were evaluated for these characteristics:

1. Demographics: age, race, sex, income level, educational level, major current or last occupation type,

citizenship, state of origin of the subjects marital status, and perceived level of health.

2. Heritage tourism interest/specialization level in general and specific to the site;
3. Volunteer data: When it began - the age when the person first volunteered for any cause, the length of service as a volunteer in general and as a volunteer at the site, frequency of participation how much time do volunteers invest, participation with family or friends, and length and duration of travel to the site;
4. Personal satisfaction level with the volunteering opportunity and the volunteer management practices; and
5. Type of benefits received. The types of volunteer benefits may include: volunteer compensation, educational opportunity, social contact, skills enhancement, improved self-concept or awareness, or improved psychological situation (e.g., less stress).

For general background information, the heritage tourism organization was asked:

1. Site information: type of site, number of visitors a year, number of full time employees, and operating seasons and days a year;
2. Volunteer information: number of paid and unpaid volunteers recruited a year; and

3. Volunteer procedures: e.g., recruitment, hiring, and firing performance evaluation, and reward.

#### *The Need for the Study*

There is little research about heritage tourism in general or specifically about older volunteers at heritage tourism sites. Little research has been done to investigate the motives for participation of older adults in leisure involvement (Seigenthaler, 1996). The recreation trends are (a) that heritage tourism is growing and is a significant portion of the worldwide tourism industry, (b) United States demographics indicate a fast growing older population, (c) tourism data indicate a growing number of older heritage tourists, (d) there is a continuing interest in sociological research and (e) there is a growing opinion that leisure participants are receiving more intrinsic benefits than extrinsic benefits.

Knowing volunteer motivations and benefits can help tourism organizations better plan and organize their staffing needs. Clary, Snyder, Ridge, Copeland, Stukas, Haugen and Miene (1998) believe that it may be productive to inquire about the motivations that may dispose individuals to seek out volunteer opportunities, to commit themselves to volunteer helping, and to sustain their involvement in volunteerism over extended periods of time.

Winter (1998b) says that not enough is known about what keeps males volunteering and what, if any gender differences exist.

Gathering background data about older volunteers at heritage tourism sites in southwestern Pennsylvania will go beyond the Pennsylvania Path of Progress visitor study. This new data about heritage sites in Pennsylvania and West Virginia should satisfy Ewert's (2002) suggestion to conduct fundamental research and to evaluate trends.

Evaluating motivations and benefits of older volunteers should satisfy both Ewert (2002) and Kelly (Stewart & Samdahl, 2000). Volunteerism is a way to be a good citizen and do good for the whole of society. The findings may lead to a conclusion about the good of the whole as promoted by Goodale (Stewart & Samdahl, 2000) and whether there is a trend toward intrinsic benefits as promoted by Kelly (1996).

There appears to be a potential win-win situation for heritage tourism organizations and older volunteers. The organization may gain valuable assistance that can maintain site operations and activities. The findings may also help managers at heritage tourism sites improve their recruitment and retention procedures for older volunteers. The older volunteers may gain educational, social and other



intrinsic benefits that may help them continue a psychologically healthy life in their later years and provide an avenue for the individual to give back to society.

#### Limitations of the Study

The study was limited by participant availability and their willingness to respond fully. The heritage tourism sites in southwestern Pennsylvania and in northern West Virginia are a finite number. The term 'sites' included heritage tourism organizations and physical sites. Selected sites included those that have a full-time staff or volunteer coordinator. All sites did not participate in the study. Volunteer populations at each site were not known prior to the study. This required multiple sampling strategies. A mail instrument was used and supplemented with limited personal contact. Mail survey instruments generally result in low response rates.

#### Basic Assumptions

Prior to the study, it was assumed that a variety of types of heritage tourism sites (private, state and federal) would be captured in the study, volunteers used in the study would represent a variety of demographic characteristics and the study subjects would be responsive within the research study time schedule. A sufficient

number of volunteers were surveyed to allow for statistical analysis of the responses. The data cannot be generalized to other populations as the sample of volunteers is nonrandom.

#### Definition of Terms

*Amotivation* - refers to behaviors that are nonmotivated. Individuals who are amotivated perceive a lack of contingency between their behavior and outcomes, in which case they experience incompetence and lack of control (Losier, Bourque, & Vallerand, 1993).

*Activity attachment* - volunteers are committed to the heritage site because of the specific volunteer activities or responsibilities and/or social relationships experienced.

*Attraction* - the perceived importance or interest in an activity or a product, and pleasure or hedonic values derived from participation or use (Iwasaki & Havitz, 1998).

*Baby boomers* - persons born between 1946 and 1964 (Gerber, Wolff, Klores & Brown, 1989).

*Benefits* - the affect or outcomes that the activity has on the volunteer.

*Built heritage* - anything of architectural design such as historic monuments, forts, roads, and homes.

*Centrality to lifestyle* - encompassing both social contexts such as friends and families centered around activities, and the central role of the activities in the individual's life (Iwasaki & Havitz, 1998).

*Challenge* - is characterized by a tendency toward seeking leisure experiences that stretch one's limits and provide novel stimuli (Weissinger & Bandalos, 1995).

*Commitment* - is characterized by a tendency toward deep involvement in, rather than detachment from, leisure behaviors (Weissinger & Bandalos, 1995).

*Competence* - is characterized by attention to feedback that provides information about effectiveness, ability, and skill (Weissinger & Bandalos, 1995).

*Constraints* - physical or psychological barriers to participation as a volunteer. Leisure constraints represent perceptions that there are factors limiting one's ability to choose among the leisure activities available in one's region (Losier, Bourque & Vallerand, 1993).

*Extrinsic motivations* - extrinsic motivation describes the motivation to do something as coming from outside of a person (Edginton et al, 2002). Extrinsic motivation is engaging in an activity for reasons other than the activity itself and can be self-determined and non-self-determined (Losier, Bourque & Vallerand, 1993).

*Generativity* - a social circle through which one manifests care for the next generation. The adult becomes "The Keeper of the Meaning" which involves passing on the traditions of the past to the next generation. It allows one to link the past to the future. *Generativity* reflects the capacity to give the self, and means 'community building' (Vaillant, 2002, p. 45, 47).

*Heritage tourism* - In the tourism industry, the term heritage has come to mean landscapes, natural history, buildings, artifacts, and cultural traditions that are either literally or metaphorically passed on from one generation to the other, but among these things which can be portrayed by promotion as tourism products. Heritage tourism is about searching for something that links the past and the present. It is integrally tied to nostalgia (Confer & Kerstetter, 2000).

*Intrinsic motivations* - involvement often occurs because participants are moved from within and not because they are influenced by external factors, and the activity is chosen for its own sake (Edginton et al. 2002). Engaging for the fun or pleasure experienced while doing the activity and is seen as an end in itself as opposed to a means to an end (Losier, Bourque & Vallerand, 1993).

*Intrinsic motivation disposition* - a tendency to seek intrinsic rewards in leisure behavior. It is assumed that the strength of this tendency will differ across individuals, but will be relatively stable within individuals and across situations (Weissinger & Bandalos, 1995).

*Involvement* - an observable state of motivation, arousal or interest toward a recreational activity or associated product. It is evoked by a particular stimulus or situation and has drive properties. Involvement levels for the most part remain stable, fluctuating somewhat over time due to a variety of circumstances (Iwasaki & Havitz, 1998).

*Intrapersonal barriers* - reflect psychological states and individual attributes (Samdahl & Jekubovich, 1997).

*Interpersonal barriers* - involve the interactions and relationships between individuals (Samdahl & Jekubovich, 1997).

*Landscape* - operationally defined as countryside (Prentice, 1993) but could also be designed landscapes such as gardens and trails.

*Leisure opportunities* - perceptions concerning the choices of leisure activities available in one's area (Losier, Bourque & Vallerand, 1993).

*Loyalty* - volunteer commitment to a specific heritage tourism site.

*Meta-analysis* - refers to a general procedure and group of analytic techniques that allow statistical analysis of results obtained in several different studies (Manfredo, Driver & Tarrant, 1996).

*Motivation* - reasons for participation as a volunteer at a heritage tourism site. Motivation is the force that initiates, directs, and sustains leisure involvement. There are three broad types of motivation: intrinsic, extrinsic, and amotivation, representing varying degrees of self-determination (Losier, Bourque & Vallerand, 1993).

*National Heritage Areas* - locations where natural, cultural, historic and recreational resources combine for a cohesive, nationally distinctive landscape arising from patterns of human activity shaped by geography (Pillifant, 2002).

*Phenomenological research* - is the discovery of the structure of the phenomenon under study from the perspective of the individual experiencing that phenomenon. It seeks and explores meanings by examining individual values and mental constructs. Specific methods used have ranged from open-ended interviews to think-aloud protocols (Masberg & Silverman, 1996).

*Place attachment* - volunteers are committed to the heritage site because of the specific physical, psychological or historical characteristics.

*Risk probability* - perceived probability of making a poor choice (Iwasaki & Havitz, 1998).

*Risk consequence*- perceived importance of negative consequences in the case of a poor choice (Iwasaki & Havitz, 1998).

*Satisfaction* - level of acceptance of the volunteer activities at a heritage site. It is the positive perceptions or feelings which an individual forms, elicits, or gains as a result of engaging in leisure activities and choices [Guinn (1995) cites Beard & Ragheb (1980)]. Leisure satisfaction reflects a positive feeling during or following a leisure activity and is an indication of the degree of contentment resulting from the satisfaction of felt needs of the individual (Guinn, 1995; Losier, Bourque & Vallerand, 1993).

*Self-determination* - is characterized by awareness of internal needs, and a strong desire to make free choices based on these needs (Weissinger & Bandalos, 1995). *Sign* - the unspoken statements that purchase or participation conveys about the person (Iwasaki & Havitz, 1998).

*Structural barriers* - factors which intervene between leisure preferences or choices and actual participation (Samdahl & Jekubovich, 1997).

*Volunteer* - For the purposes of this study a volunteer is a non-salary worker who voluntarily wants to be at the site. The worker cannot be required to be at the site, for example to fulfill community service or school course requirements. Volunteers may gain out-of-pocket expenses, such as transportation, meals and uniforms (Crompton, 1999).



## CHAPTER 2-LITERATURE REVIEW

### Overview

This research investigated adult volunteers at heritage tourism sites in southwestern Pennsylvania and northern West Virginia to mainly identify their sociodemographic characteristics and motivations for volunteering. Other parameters included: (a) history of volunteering, (b) level of interest in heritage tourism, (c) level of satisfaction with the heritage organization's program for managing and retaining volunteers, (d) type of benefits received, (e) original reasons for volunteering, (f) level of commitment, (g) constraints and facilitators to volunteering, (h) social consequences; and (i) attachment to activity and place. The study emphasized populations aged 50 or older.

Research about adult heritage tourism volunteers is a multi-discipline effort that involves leisure, tourism and recreation, sociology, psychology, physiology, anthropology, aging and gerontology, volunteerism, education, health and wellness, environment protection or conservation, landscape and architecture, and economics. Recreation organizations are often structured to encourage physical, intellectual, spiritual, social, and educational development that strives for a higher quality of life

(Edginton et al., 2002). Subjects studied include leisure visitors and volunteers, older adults, social, environmental or community service volunteers and volunteer associations; and heritage volunteers and associations.

The main dependent variable in this study was motivation. Other variables were level of satisfaction, benefits derived, level of commitment, constraints (time, travel distance, level of health, mobility, management facility standards), social issues (volunteering history, social relationships, socioeconomic status and demographics) and activity and place attachment. Factors that can influence these dependent variables may include: expectations, attitudes, values, emotions, mood, needs, goals, preferences, type of experience realized, competence/skills (education level, volunteer experience) and individual behaviors. For the purpose of this literature review, heritage tourism volunteers are assumed similar to heritage tourism visitors in sociodemographic characteristics and initial motivations.

#### Tourism, Leisure and Recreation Research

In 1954, Abraham Maslow published what has become known as one of the most popular formulations of human needs. He proposed a hierarchy of needs that moves from the foundation of basic physiological needs through security

and safety, social needs such as belonging and love, selfhood needs such as self-respect and feeling of success, and on to self-actualization (Kelly, 1996).

Up until 1980, most investigations of leisure were of forms of behavior, usually called activities. An exception was the 1957 Kansas City Study of Adult Life which raised questions of the meanings of activity and found leisure activity has several meanings including relaxation, social engagement, and self-expression (Kelly, 1996). Edginton et al. (2002) says that contemporary society often views leisure as a way of bringing balance into one's life.

In 1975, a psychologist of creativity, Mihaly Csikszentmihalyi, published flow theory which is often now cited in leisure research literature (Vaillant, 2002). Flow theory identifies certain environmental conditions under which a heightened experience of involvement may occur (Kelly, 1996) Flow is the experience that "...lifts the course of life to a different level" (Edginton et al., 2002, p. 7, 47).

Advocates of new perspectives on leisure call for a radical shift from values placed on results to values placed on experience. The outcomes are measured in terms of personal fulfillment and community rather than in scores and victories (Kelly, 1996). Experiential leisure research

was introduced in the late 1960s and was extended in a number of subsequent studies. The experiential approach suggested that recreation should not be viewed merely as an activity. Instead, recreation should be conceptualized as a psychophysiological experience that is self-rewarding, occurs during nonobligated free time, and is the result of free choice (Manfredo, Driver & Tarrant, 1996). The experience holds the explanation of why people engage in recreation, gives guidance in understanding what people want from recreation, and offers insight into how it might benefit them. These concepts served as a basis for the four levels of demand for recreation defined in 1975: (a) settings, (b) activities, (c) recreation experience outcomes and (d) enduring personal and social benefits (Manfredo, Driver & Tarrant, 1996).

Both sociology and psychology, the main sources for explaining and predicting tourism behavior, rely heavily on the attitude construct for researching the subject (Gnoth, 1997). In more recent years, emotions have become recognized as a further important source for behavior (Gnoth, 1997). Contemporary research focuses on the human dimensions of natural resource management, societal decision-making processes and integrated resource management efforts, economic aspects and recreation-derived

benefits. Research commonly includes topics such as normative behaviors and values (Ewert, 2002). Much of the leisure research focuses on recreation users and tourists. A small portion of research is being conducted on leisure volunteers, mostly volunteer associations.

*Recreation Experience Preference (REP) scales*

Manfredo, Driver and Tarrant (1996) conducted a meta-analysis of 36 studies that used Recreation Experience Preference (REP) scales from 1975-1979. REP scales are used to study the motivations for leisure. This analysis showed overall consistency in domains and scales. The REP Items were identified by reviewing the personality trait and motivation literature to determine the types of needs and motivations that might influence recreation. The REP scales are grouped into 19 domains that comprise scales which were shown by hierarchical clustering techniques to be empirically related. The REP scales contain 328 items, yet the entire list was not used in any of the 36 studies reviewed in the meta-analysis. Typically, a subset of these items was used, depending on the study objectives. (Manfredo, Driver & Tarrant, 1996).

Manfredo, Driver, & Tarrant (1996) concluded that the analyses supported the factor structure of the REP domains and scales. The REP scales can be usefully applied when

attempting to determine motivations for or the psychological outcomes desired from leisure. In this regard, the scales have been used to determine trip-specific motivations for leisure and activity-specific motivations.

*Leisure Activities Blank (LAB)*

Lounsbury and Hoopes (1988) examined the five-year stability of leisure participation and motivation factors among 139 community residents as measured by a list of 113 leisure activities in 1980 and in 1985. The instrument was based on the Leisure Activities Blank (LAB) which was developed by McKechnie in 1975. One part of the instrument had a 47-item scale which represented a range of different motivational attributes for engaging in one's most favorite leisure activity. Another part of the instrument measured life satisfaction using 25 items developed by Andrews and Withey in 1976.

Five participation factors comprising: easy living, sports/recreation, domestic, organizational, and intellectual activities showed five-year stability coefficients ranging from .44 to .71. Six factors measuring motivations for engaging in a favorite leisure activity, (a) achievements, (b) supervising others, (c) social interactions, (d) creativity, (e) physical activity, and

(f) mental activity, showed stability coefficients ranging from 0.24 to 0.50. Lounsbury and Hoopes (1988) concluded that leisure activity factors and to a lesser extent, leisure motivation constructs, are generalizable over a five year period and appear to represent rather stable individual difference variables.

### *Specialization/Serious Leisure*

Serious leisure may take the form of amateurism or hobbyist pursuits of volunteering, and it requires effort, commitment and a sense of obligation (Mannell, Zuzanek & Larson, 1988). Recreation specialization is a developmental process that entails a progression in behavior, attitudes, skills, commitment, career changes, stages of involvement, turning points and preferences (Scott & Shafer, 2001). Leisure can substitute for work in the lives of the unemployed and the retired or people choosing work reduction. Mannell, Zuzanek and Larson (1988) proposed that the role of commitment and obligation in leisure needs more research, as does the link between the occurrence of flow-like experiences and psychological well-being.

Scott and Shafer (2001) suggest that specialization progression can be understood in terms of (a) a focusing of behavior, (b) the acquiring of skills and knowledge, and (c) a tendency to become committed to the activity such

that it becomes a central life interest. The three processes are interrelated and mutually reinforcing. Researchers have employed a variety of behavioral indicators to measure recreational specialization, including years of experience, frequency of participation, the number of sites visited, the number of activity-related books and magazines purchased and owned, and distance traveled to participate in an activity (Scott & Shafer, 2001).

Scott and Shafer (2001) argue that specialization progression should be conceived not just in terms of the acquisition of skills and knowledge but also in terms of the desire to develop skills and knowledge. Individuals inclined to skill development may spend their time (off site) reading and studying about the activity, trying new techniques, and talking about the activity with other devotees (Scott & Shafer, 2001). An orientation to skill development and the acquisition of knowledge may find expression in a concern for authenticity or historical accuracy. For example, historical accuracy is a central concern among Civil War re-enactors.

A leisure activity is a central life interest to the extent that a person's lifestyle, personal identity, and social networks are constructed around the leisure activity



(Kim, Scott & Crompton, 1997). Penalties include the loss of a strongly held identity, the loss of friends, and the lack of skills, knowledge and financial resources to affectively pursue alternative interests (Scott & Shafer, 2001). Although some people progress, most probably maintain involvement at a relatively fixed level or actually decrease their participation over time (Scott & Shafer, 2001). Why people progress might be explained by the principles of social learning, reinforcement theory (extrinsic or intrinsic rewards), and contingencies or constraints (Scott & Shafer, 2001).

#### Heritage Tourism

##### *Recreation Demand*

Prentice (1993) considered motivations for heritage consumption as perceived by potential consumers: "In a literal sense, persons do not consume heritage attractions but more appropriately consume an experience of these attractions such as vistas, literary and other associations, spiritual uplift, or satisfaction of curiosity and the like" (p. 273, 276). Prentice investigated how these motivations may be used as a means of segmenting consumers in terms of their likely interest in different types of heritage as leisure experiences.

These motivations are defined as desired settings, experiences, and benefits in terms of the Manning-Haas hierarchy of demand for outdoor recreation.

In the Manning-Haas hierarchy, Level 1 is activities; Level 2 concerns settings, including environment, social, and management settings, and the recreationists expectations of these settings for the particular activities being pursued; Level 3 is constituted by experiences such as challenge, risk taking, and physical exercise; and Level 4 is the psychological and societal benefits gained from the activity. The hierarchy offers the potential to enhance the predictive power of models of consumer choice. A focus on experiences and benefits (Levels 3 and 4) enables one to pay attention to what is actually gained from leisure activity as an intermediate or final outcome (Prentice, 1993, p. 274).

Prentice's (1993) data came from a study of 675 residents on the Isle of Man in 1989. Both specific motivations and self-rated measures of interest were used to measure resident's regard for landscape and built heritage. The research design included six Level 3 (experiential) motivations: pleasure of viewing, education, information, relaxation, entertainment, and exercise, and

four Level 2 (settings) motivations: to take the children, to take visitors, as part of a holiday, and as part of a day out. The islander's reasons for visiting a heritage site differed by heritage type. The reasons for visiting different types of heritage sites differed among islanders. Age was important in that persons in their 30s were much more likely than others interviewed to give educational motivations. The frequency of use and affection for landscape amenities are associated with greater knowledge of the area.

The analysis demonstrates that researchers need to distinguish between the motivations for the consumption of different kinds of heritage. Prentice concludes that "it [is] clear that it would be insufficient to regard heritage consumption as undifferentiated in terms of types of heritage" (Prentice, 1993, p. 284) and "...in the discriminatory power of interest in landscape and in built heritage,..." (p. 285). In terms of heritage consumption, the islanders can also be grouped by their socioeconomic characteristics. "The analysis implies that attention needs to be paid both to interest levels and to more conventional specific motivations or reasons for visiting." (p. 288).

### *Visitor Experiences*

Masberg and Silverman (1996) noticed that very little research into visitor experience at heritage sites has been adequately designed to explore the visitor's perspective. Prentice (1993) examined the motivations of heritage site visitors by analyzing their own self-interest ratings, but their choices consisted of conceptual categories defined and supplied by the researcher. To get at the subjective nature of people's experience, Masberg and Silverman (1996) conducted qualitative phenomenological research of college student visitor's perspectives on heritage sites they had visited. Masberg and Silverman (1996) tested open-ended questions in a pilot phase then prepared a five question instrument and gave it non-randomly to 60 graduate and undergraduate recreation and park administration students at Indiana University. Data was analyzed using qualitative analysis techniques.

Masberg and Silverman (1996) found two themes that explained the term, heritage site: (a) heritage sites involve history, and (b) heritage sites involve history along with culture. Seven different themes emerged from students' describing their visit: (a) activities, (b) companions, (c) site personnel, (d) information, (e) built

environment, (f) nature, and (g) culture. Most descriptions included a combination of aspects.

Masberg and Silverman (1996) found that the student responses also showed two broad themes to the question, What did you get out of the visit? (a) knowledge gained, primarily factual and external, and (b) experiences that were more personal, emotional or experiential. Three different types of outcomes were mentioned: (a) highly personalized learning, (b) social benefits from interactions with their companions, and (c) aesthetic experiences of appreciation of the setting. These findings suggest that the student visitor's experience of a heritage site is multidimensional.

#### *Visitor Specialization*

Kerstetter, Confer and Graefe (2001) believe that there may be types of tourists who progress from general travelers to focused or "specialized" tourists. This progression or continuum of behavior could be explained as a recreation specialization paradigm such that a heterogeneous group of heritage tourists could have subgroups that range from history novice to history expert. They cited previous research that has shown other types of recreationists (specialists) differ in terms of motivation, management preferences, resource dependency, trip

satisfaction, amount of mediated interaction, perception of the quality of the experience, and environmental preferences.

To evaluate this specialization paradigm, Kerstetter et al. (2001) studied heritage tourists who visited The Path of Progress in southwestern Pennsylvania to determine whether types of heritage tourists exist and if so, whether they differ based on sociodemographic characteristics, visitation behavior, motivations, and/or perceptions. A systematic sample of visitors was obtained at nine sites from May through October 1995. The researchers did onsite interviews and sent follow-up questionnaires to individuals who agreed to participate further.

Kerstetter et al. (2001) prepared a survey instrument with a 10-item specialization index and three subdimensions that were theorized to represent the multidimensional nature of specialization. The subdimensions were (a) past experience, (b) involvement/knowledge, and (c) investment. Respondents were divided into three evenly sized groups - low, medium- and high-specialization (p. 268). The parameters of interest were (p. 269):

1. Level of specialization and visitor characteristics (i.e., age, education, gender, income);

2. Visitation behavior (i.e., nights spent in area, miles traveled one way to site, past visitation, total number of sites visited, future intention to visit);
3. Motivations (i.e., learning about a historical period or event; experiencing authentic elements in a historic destination; the importance of the site's historic character in the decision to visit; an interest in personal heritage, culture, and/or ethnicity; a part of visits to other historic sites along the Path of Progress);
4. The level of perceived quality (i.e., overall satisfaction, impact of others on enjoyment); and
5. Perception of site authenticity.

Kerstetter, Confer and Graefe (2001) concluded that the results of the study showed that there are specialists within the heritage tourism market and that they can be organized sequentially along a continuum. Knowing that there are segments or discrete groups of heritage tourists is useful in program development and marketing. This conclusion might also apply to heritage volunteers.

#### Motivations

A topic of central concern in leisure research is the motivations for leisure. This is a key area because it helps determine why people engage in leisure behavior in the manner they do, and it assists in understanding the

consequences of leisure engagements (Manfredo, Driver, & Tarrant, 1996). Losier, Bourque, and Vallerand (1993) believe that motivation may be the most important factor that may affect leisure experiences. To understand how to keep volunteers working in leisure service activities, Scott (1996) says that it is vital to know their motivation for volunteering in the first place. Since money is not involved, Scott (1996) thinks that the motivation to freely give their time must be very strong.

A common finding has been that visitors often differ in ways that fundamentally affect satisfaction and perceptions of quality. These differences may be socioeconomic, demographic, attitudinal, preference-related, or motivational. Such analyses have also demonstrated that individuals frequently have multiple motivations in leisure pursuits and define their satisfaction across a range of attributes. Motivations can even transcend the recreational setting (Prentice, 1993)

### *Measuring Motivation*

#### *Leisure Motivation*

Beard and Ragheb (1983) developed an instrument for measuring leisure motivation based on previous research. The study covered the full range of leisure activities, evaluated more than 150 items, and involved both students



and non-students. In contrast, many leisure studies use college students only as surrogates of the general population. After testing and refining the final 103-item instrument, it was field tested on 1,205 individuals in spring 1981. The analysis confirmed the four subscales in the instrument which are quoted here:

1. The *Intellectual* component of leisure motivation assesses the extent to which individuals are motivated to engage in leisure activities which involve substantial mental activities such as learning, exploring, discovering, creating, or imagining.
2. The *Social* component assesses the extent to which individuals engage in leisure activities for social reasons. This component includes two basic needs. The first is the need for friendship and interpersonal relationships, while the second is the need for the esteem of others.
3. The *Competence-Mastery* component assesses the extent to which individuals engage in leisure activities in order to achieve, master, challenge, and compete. The activities are usually physical in nature.
4. The *Stimulus-Avoidance* component of leisure motivation assesses the drive to escape and get away from over stimulating life situations. It is the need for some individuals to avoid social contacts, to seek solitude and

calm conditions; for others it is to seek rest and to unwind themselves. (p. 225).

The alpha reliabilities for the Beard and Ragheb (1983) leisure motivation instrument range from .90 to .92. The intercorrelations show the four components of leisure motivation are well differentiated. The authors conclude that individuals are driven to engage in leisure activities for different reasons.

#### *Intrinsic Leisure Motivation (ILM) Scale*

Weissinger and Bandalos (1995) evaluated nine studies that used the 24-item Intrinsic Leisure Motivation (ILM) Scale. The scale has four theoretically derived subscales: (a) self-determination, (b) competence, (c) commitment, and (d) challenge; and each subscale has six items. The ILM Scale is an indicator of variability in the desire for intrinsic rewards across individuals in a given situation, or within individuals across multiple situations. The total score from all 24 items can be used as a generalized measure, or subscale scores can be used as measures of desire for specific intrinsic rewards.

Weissinger and Bandalos (1995) conclude that intrinsic motivation disposition is assumed that the strength of this tendency will differ across individuals, but will be relatively stable within individuals and across situations.

Persons high in the *self-determination* intrinsic motivation component tend to want to feel in control of their leisure behavior, and display a high degree of willfulness. Persons high in the *competence* intrinsic motivation component tend to seek out leisure behaviors which convey competence feedback. Persons high in the *commitment* intrinsic motivation component tend to value leisure behaviors, and feel dedicated to leisure in their lives. Persons high in the *challenge* intrinsic motivation component tend to select leisure behaviors that slightly exceed their skills, and should perceive this state as challenging rather than aversive or threatening.

Weissinger and Bandalos (1995) tested six studies for gender differences; only one study showed significant differences. Chronbach alpha reliability coefficients ranged from .872 to .913. The subscales alphas ranged from .638 to .832. Construct validity data showed good correlation with 13 other measures of theoretically related variables. Weissinger and Bandalos (1995) report that intrinsic motivation theory has been applied over the last two decades to many leisure settings that provide opportunities for people to select behaviors that provide intrinsic rewards.

*Tourism Motivation*

Gnoth (1997) introduced a model of tourism motivation and *expectation* formation. Expectations determine performance perceptions of products and services as well as perceptions of experiences. Motivations impact on satisfaction formation and attitudes are the basis for motivation research. Gnoth (1997) concludes:

"...that both *emotional and cognitive* parameters need to be included when tourism motivations are considered for planning and resource management purposes. Inner- or self-directed values contain predominantly emotional drives, while outer-directed values are mainly cognitive in nature. As functions, *attitudes* are the mediators between needs and values as they arise within a subject and the particular situation. Both of these parameters (motives and situation) can vary and determine the function of an attitude within the dynamic flow of action. The result is the multiplicity and multidimensionality of tourists' behavior." (p. 283, 286).

## Involvement

Involvement has become one of the most researched constructs in consumer behavior and marketing in the last ten years. It is now receiving considerable coverage in the leisure literature (Dimanche, Havitz, & Howard, 1991).

### *Involvement Profile Scale*

In 1991, Dimanche, Havitz and Howard introduced an Involvement Profile (IP) scale to North America from France (originally developed by Laurent and Kapferer in 1985) to provide standardized instrumentation that could be available for generic use in the tourism literature. Involvement is proposed as an independent variable in studies of loyalty, substitution, and pricing and is a central component of the leisure experience and in recreation behavior, whether it is termed specialization, commitment, or ego involvement.

The Dimanche, Havitz and Howard (1991) questionnaire included six scales measuring people's involvement with recreational and touristic activities (downhill skiing, golf, competitive running, amusement parks, national parks, and dining out). Each scale was composed of the same 15 items, with three items measuring each dimension of involvement. Several behavioral measures related to each activity and demographic questions regarding the age, sex,

education level, marital status, and state of origin of the subjects were also included in the questionnaire.

Iwasaki and Havitz (1998) also proposed that personal antecedents of involvement are (a) interpersonal constraints, which lead to low involvement; and, (b) anticipation of personal benefits and/or initial gain of personal benefits such as satisfaction and health, which leads to high involvement. Iwasaki and Havitz (1998) state that the social-situational antecedents reflect circumstances such as (a) social support from significant others; (b) situational incentives; (b) social and cultural norms; (c) interpersonal and structural constraints; and (d) anticipation of social benefits and/or initial gain of social benefits such as friendships and family solidarity.

Dimanche, Havitz, and Howard (1991) reported factor analyses that showed involvement has four dimensions: (a) sign, (b) importance-pleasure, (c) risk probability, and (d) risk consequence. The sign dimension results reaffirm that *self-expression* is an important component of leisure activity. The model proposed by Iwasaki and Havitz (1998) includes five similar dimensions: attraction; sign; centrality to lifestyle; risk probability; and, risk consequence. Though most often discussed in terms of physical risk, numerous other sources of risk (e.g.,

social, psychological, financial) have been identified in leisure contexts.

### Satisfaction

In 1990, Csikszentmihalyi focused on life satisfaction as related to involvement in specific life experiences, including those that can be defined as leisure.

Csikszentmihalyi presents several elements of enjoyment or flow directly related to satisfaction and suggests that all of these elements are present in a truly engrossing, enjoyable and satisfying experience. These factors help in identifying what constitutes quality of life experiences and provides measures for evaluating quality of life factors which are (Edginton et al., 2002):

1. A challenging activity that requires skills.  
...Most optimal experiences occur within activity that is goal-directed, bounded by rules and requiring a certain level of skill;
2. The merging of action and awareness. When all of a person's skills are necessary to deal with the activity at hand, that person becomes totally immersed in the activity;
3. Clear goals and feedback;
4. Concentration on the task at hand;

5. The paradox of control - a sense of personal control over one's destiny with regard to the activity of choice. Being skilled enough to eliminate or minimize risk of failure or injury;

6. The loss of self-consciousness. It accompanies a feeling of oneness with something else; and

7. The transformation of time - the most commonly reported characteristic of flow is the change in perception of time. (p. 7, 8).

Guinn (1995) examined the relationships between leisure satisfaction (fulfillment) and the leisure repertoire of 394 older persons ranging in age from 59 to 91 years and who lived in age-segregated recreational vehicle and mobile home parks in Texas. Guinn's (1995) instrument was a self-report questionnaire with questions covering the Beard and Ragheb's 1980/1983 Leisure Satisfaction Index, the 1984 Lifestyle/Exercise Questionnaire (not discussed in this report), and other variables. The leisure satisfaction index has six unidimensional need subscales: psychological, educational, social, relaxational, physiological, and aesthetic. The results indicated that both overall and component satisfaction were related to repertoire size and those persons with a larger repertoire differ significantly in



component satisfaction from those with smaller repertoire. The finding implications suggest that leisure satisfaction is somewhat contingent upon maintenance of a larger leisure repertoire throughout this later life cycle. This was supported by past research that showed that the number of activities participated in are more significant than involvement frequency.

#### Benefits

Driver defined a benefit as a change that is viewed to be advantageous, an improvement in condition or gain to an individual, to a group, to a society (community), or to another entity (Anderson, Nickerson, Stein, & Lee, 2000). Benefits can be immediate (learning new things about a particular culture at a particular heritage site) or delayed (greater pride in one's locale because of accumulated increased historical cultural understanding and personal reflection about that knowledge) (Driver, 1999).

Leisure benefits can be personal (psychological, physiological), social, economic or environmental (Driver, 1999; Anderson, Nickerson, Stein, & Lee, 2000):

1. *Personal*: health and well-being, self image and self-satisfaction.
2. *Social or Societal*: social bonding, community satisfaction and cultural identity.

3. *Economic*: productivity products of employment, tourism, and recreation products bought and sold.
4. *Environmental*: environmental health and protection, increased awareness of human impacts, and investment in wildland areas.

There are three benefit or incentive typologies for voluntary associations (Caldwell and Andereck, 1994):

1. *Materials or Utilitarian*: Tangible rewards that can be translated into monetary value (e.g., wages, salaries, property value, information, perks). Allow calculation of benefits and costs gained for exchange of personally held for incentive.
2. *Solidary or Affective*: Derived from social interaction, interpersonal relationships, friendships, group status, and group identification.
3. *Purposive or Normative*: Based on global concerns of a suprapersonal nature. Appeal to values such as community action and support, civic responsibility, and environmental concern.

Handy, Cnaan, Brudney, Ascoli, Meijs, & Ranade (2000) say "The benefits to the individual who volunteers consist of private benefits of the activity and the public benefits of the activity". Handy et al (2000) found that an individual who volunteers must have benefits greater than

the costs incurred for that activity as defined by the formula,  $B_{i \text{ private}} + B_{i \text{ public}} > C_{i \text{ private}}$ , where:

1. *Private benefits* ( $B_{i \text{ private}}$ ) is monetary remuneration, enhancement of social status and social opportunities (reputation), improvement of potential earnings capability (wealth), social interaction and leisure activity, a sense of satisfaction from working for a cause one supports, and a good feeling about oneself (warm glow).
2. *Public benefit* ( $B_{i \text{ public}}$ ) is his or her valuation of those public benefits associated with increasing the supply of those goods and services for which the individual volunteers.
3. *Costs of volunteering* ( $C_{i \text{ private}}$ ): include items such as the time spent volunteering, effort, money spent on supporting the activity and/or donations to the cause, and the opportunity cost of income and social pleasures foregone.

Similar volunteer activities may require more or less effort from the volunteers depending on where and how they are performed (Handy et al., 2000). For example, a more recognized and reputable organization that is more demanding of the volunteer to meet certain codes of work ethics increases the costs to the volunteer. Further, Handy

et al (2000) found (a) in the case of different volunteer tasks, the time and effort involved can vary significantly, although the benefits to the volunteer may be relatively equal and (b) similar volunteering activities can be undertaken for different benefits to the volunteer.

Past research has shown that motivating individuals to join voluntary organizations should include incentives perceived as valued, incentives should be varied and mixed, and those who participate or contribute should receive the benefits (Caldwell and Andereck, 1994). Caldwell and Andereck (1994) found that (a) men and members with incomes less than \$40,000 rated material benefits for joining a voluntary organization as more important than did women and members with higher incomes, (b) incentives and material benefits was not as important for continuing membership, and (c) more active participants received more personal, social or communal benefits than did less active participants. Dennis and Zube (1988) and Caldwell and Andereck (1995) both found that intellectual pursuit is a top incentive for joining a voluntary organization.

Handy et al (2000) found that the lower the benefits to the volunteer the more likely the person will be considered a volunteer and individuals who receive explicit monetary or nonmonetary remuneration is considered as less

a volunteer, but this varied across regions and cultures. Most volunteers are not purely altruistic, and acknowledge the fact that they benefit from the volunteer experience (or else they would soon quit) (Handy et al., 2000). Caldwell and Andereck's (1994) results found that purposive or normative benefits are the strongest motives for joining a voluntary association followed by solidary or affective benefits then material or utilitarian benefits. Caldwell and Andereck (1994) could not determine whether the most active members are the most committed.

The National Recreation and Park Association introduced benefits based programming (BBP) as a way of assisting leisure service professionals with the issue of identifying the values and benefits of their services. It is based on four principles: (Edginton et al 2002)

1. Outcome-oriented goals that address social issues and concerns that society views as significant must be articulated;
2. Recreation opportunities need to be structured to directly address stated goals;
3. Comprehensive monitoring and evaluation procedures that document goal achievement and the ensuing benefits to the individual and beyond must be established; and

4. A comprehensive information system that effectively communicates the significance of programs and services required.

Organizations can use benefits based programming to understand their clientele better (Anderson, Nickerson, Stein, & Lee, 2000). Benefits-based programming is based on benefits-based management (BBM). The objective of BBM is to optimize net benefits and to add as much positive value as possible. In BBM there are three types of leisure benefits (Driver, 1999) [Quoted]:

1. A change in the condition of individuals, groups of individuals (a family, a community, society at large, or the natural environment) that is viewed as more desirable than the previously existing condition). Examples include improved health, a more economically stable local community, and improved habitat for a species of wildlife.
2. The maintenance of a desired condition and therefore the prevention of an unwanted condition. Examples include maintenance of health, pride in local community, and an erosion-free trail.
3. The realization of a satisfying psychological recreation experience, such as mental relaxation, closer family bonds, learning of many types,

tranquility, enjoying natural scenery, and testing, applying, and/or developing one's skills.

### Constraints

Samdahl and Jekubovich (1997) used ex post facto research to reassess a developed hierarchical model of leisure constraints by Crawford, Jackson and Godbey published in 1991. The 1991 model identifies three primary sources for leisure barriers: structural, interpersonal, and intrapersonal. The leisure constraints literature has focused on the end goal of leisure activity participation which might help managerial strategies. Leisure researchers have suggested that leisure constraints can help us understand differences in leisure behavior between subgroups of our society and broader contextual variables that shape people's leisure choices. Guinn (1995) said that leisure constraints of aging could be economic, health and physical.

Samdahl and Jekubovich (1997) found several emergent themes best captured the critical factors that influenced people's leisure: (a) making time for self, (b) coordinating time with others, (c) compromising on activity, and (d) the significance of sharing. The most influential factors that shaped this process were social relationships. For their research, the activity itself was

often secondary to or at least deeply imbedded within, the social environment in which that activity occurred. This moved the researchers further away from a focus on leisure activities and toward a deeper respect for the significance of social relationships and the role of leisure in maintaining those relationships. They conclude that researchers need to understand the limitations of leisure constraints as a vehicle for studying the broader nature of leisure choices and meanings.

Alexandris, Tsorbatzoudis, and Grouios (2002) studied the influence of constraint dimensions on *intrinsic motivation, extrinsic motivation and amotivation* on 257 adult residents in Greece, who reported participation in some type of sport and physical activity. The residents completed the Sport Motivation Scale and the leisure constraints questionnaire. Alexandris, Tsorbatzoudis, and Grouios (2002) used an expanded constraints model, with the negotiation and balance propositions developed by Jackson, Crawford and Godbey in 1993 and standardized in Greek population sport settings. The negotiation and balance propositions, for the first time, introduced the concept of motivation in leisure constraint research. The propositions suggested that participation results from successful



negotiation of leisure constraints and motivation is an important construct in this negotiation.

The results indicated that intrapersonal constraints accounted for 38 percent of the variance in amotivation, and 15 percent of the variance in intrinsic motivation. No relationships were revealed between interpersonal and structural constraints and motivation, and between constraint dimensions and extrinsic motivation. The researchers report that these results suggest that intrapersonal constraints act as de-motivating forces for individuals; the results support elements of the hierarchical model of leisure constraints, and further clarify the role of motivation in the model.

#### Social Issues

Links between social status, education, and resource mobilization of social movement organizations draw interesting parallels with Beard and Ragheb's (1983) "social" and "intellectual" motivations for leisure and literature on environmental concern (Dennis & Zube, 1988). Social status has been established as a predictive variable in recreation, environmental concern, and voluntary research (Dennis & Zube, 1988). Expressive membership incentives include fellowship among members and perceived social status within the group (Dennis & Zube, 1988).

Education level is found to be a predictive variable in research on participation in both voluntary associations and outdoor recreation (Dennis & Zube, 1988). The relationship between elevated environmental concern and voluntary association membership is affected by a member's perceived personal utility for a quality environment, and by their altruistic motives for societal well-being (Dennis & Zube, 1988).

#### Place Attachment

Site quality may play a significant role in the level of initial and continued participation at recreation and heritage tourism areas. Consumer choice behavior could be impacted by the importance of site characteristics or attributes to the individual participant. Participants may be constrained by scarce resources of leisure time, money and effort.

Siderelis and Moore (1998) studied how individuals make decisions about 17 substitute sites (discrete) choices for lake boating using consumer and recreation demand theory and trip-price indexes. They looked at lake *attractiveness* and the importance of lake attributes such as lake/water surface acres and the quantity of lake support facilities. They recorded respondent's preferences on each of 20 lake attributes. Three factors summarized the

perceived importance of lake attributes to respondents: *lake use conditions, natural surroundings* or *lake use conditions and customer support services*. Using data clustering techniques, the researchers reduced the 17 boating sites to 5 boating geographical regions and a no-lake choice.

Siderelis and Moore (1998) found that the probable choices of a boating trip to substitute lakes in particular regions increased as the importance of lake condition increased and decreased as the importance of natural conditions and support services decreased. Participants at different types of recreation areas may place more importance on a natural condition like scenic beauty or on a support service like helpful staffs than on a site condition like crowding. The researchers suggest that other site variables might include (a) the variety of physiographic, topographic, and landscape features; (b) season and elevation; (c) environmental quality or the availability of various resource dependent opportunities; and (d) recreation opportunity setting conditions.

Heritage tourism sites are located in urban, suburban or rural areas. In general, urban destinations are more highly visited by tourists than are rural attractions (Chen & Kerstetter, 1999). Chen and Kerstetter (1999) report that

rural tourism in the United States is growing due to increased automobile and weekend travel, a mature travel market, and changing tastes and preferences. Rural tourism may also be growing due to a need for urbanites to escape to open spaces and wilderness settings or areas that remind them of old-fashioned customs and traditional values, simpler lifestyles in previous generations, linkage to this nation's heritage and basic American character. Educated travelers usually appreciate change in their environment and are more willing to take chances and explore new things or areas (e.g., rural areas) (Chen & Kerstetter, 1999).

Rural tourism experiences could include farm vacations, harvest or cultural festivals, and historical re-enactments. Many of the heritage sites in southwestern Pennsylvania and northern West Virginia are located in rural areas. Chen and Kerstetter (1999) studied rural Pennsylvania tourism using international students. Chen and Kerstetter (1999) defined rural tourism as a place in Pennsylvania that is not located in a city, has a population of 2,500 or less, and provides a variety of tourism amenities.

An individual's travel destination choice process might depend heavily on the image of a destination which can be positive or negative. Image is one's perception of

attributes or activities available at a destination (Chen & Kerstetter, 1999). Tourism destination image consists of three components similar to those used by Siderelis and Moore (1998): the *product* (e.g., quality of attraction, cost); the *environment* (e.g., weather, scenery, facilities); and *behavior and attitude* (e.g., of destination hosts) (Chen & Kerstetter, 1999). Destination image also differs based on previous experience, degree of familiarity with the destination, cultural background, geographic origin, and expectation of the destination (Chen & Kerstetter, 1999).

Chen and Kerstetter (1999) developed a list of 48 rural attribute scale items from a review of literature and a focus group of international students. A four factor solution of the image attributes was judged the most suitable: *Tourism Infrastructure* (e.g., good local infrastructure, very accessible, ample local information), *Atmosphere* (e.g., relaxing atmosphere, friendly people, lots of open space), *Natural Amenity* (e.g., attractive scenery, beautiful greenery, many places of interest to visit), and *Farm Life* (e.g., many farms, simple lifestyle). Chen and Kerstetter (1999) found that (a) The students were most likely to agree with the Atmosphere and Natural Amenity dimensions of a rural tourism area in Pennsylvania

such as fresh air, quiet, and peaceful/tranquil than the Farm Life and Tourism Infrastructure dimensions, (b) Female international students were more likely than male international students to agree with the Tourism Infrastructure and Natural Amenity Dimensions, and (c) Graduate international students were more likely than undergraduate international students to agree with the Natural Amenity dimension image items. Chen and Kerstetter (1999) found no significant differences between the Atmosphere dimension and international student demographic or travel behavior variables. Chen & Kerstetter (1999) conclude that image data can be used to develop or enhance tourism promotions and effective positioning of destinations.

## Volunteerism

### *General Information*

Henderson and Silverberg (2002) describe volunteering as any activity in which an individual gives freely to benefit other people, groups or organizations. Volunteers have changed and today come from all economic groups, races, and communities. Hispanic baby boomers are third in number of volunteers behind Whites and African Americans but rank first in hours volunteered per person (Powers, 1998). Minorities in leadership and staff positions will

help attract minorities to the organization (Powers, 1998). Understanding the motive of different racial groups to volunteer is important (Powers, 1998).

The composition of volunteerism in one sense has increasingly moved down into the social class scale, since more middle-class men and women have the time, or see fit to use their free time, for service to others (Kaplan, p. 154). Volunteering is a behavior that, if established early, continues throughout life (Powers, 1998). The amount of time we spend volunteering is increasing in every age group except for the very old (Powers, 1998). Most of us say that if we had the choice we'd reduce the amount of time we spend in paid work and increase the hours we spend engaged in volunteer activities (Powers, 1998).

Various authors define four key dimensions for volunteers: (a) free will, (b) availability of rewards (remuneration), (c) formal organization, and (d) proximity to the beneficiaries (Handy et al, 2000). The majority of people who volunteer do so because they are asked (Powers, 1998). Volunteerism can be spontaneous or planned helping. Spot volunteers respond to specific needs and maintain a casual relationship with the volunteer organization (Powers, 1998). Regular volunteers develop more formal and ongoing relationships with the volunteer organizations,

they become involved out of personal commitment and gain a sense of gratification and accomplishment or some other reward (Powers, 1998).

Handy, Cnaan, Brudney, Ascoli, Meijs and Ranade (2000) developed a 50 item instrument to explain variations in public perception of who is a volunteer in six geographic regions around the world. The questionnaires were self-administered to over 500 participants in six geographic regions. One region was Philadelphia, Pennsylvania. Across the 50 items, they identified the five volunteer scenarios that ranked highest for all regions. The results showed a cross-cultural consensus in the public perception of who is considered definitely a volunteer. The researchers found that volunteers do not receive any implicit or explicit remuneration, and the volunteer activity takes considerable time and effort on the part of the volunteer for the benefit of others.

#### *Volunteer Motivations*

People's motivations for volunteering may change over time and the concept of volunteerism has changed to a more professional focus over the years. With the expansion of public and private agency services, volunteers are more than persons of good will who have the time to give; they are also literate and knowledgeable in special fields.



In a 1969 Gallop poll, the criteria found to affect the degree of volunteer participation were: (a) a genuine interest by the person in the project; (b) a feeling that one's efforts would be meaningful toward achieving some result; and (c) some recognition for the participant (Kaplan, 1979). Thirty years later, the 1999 Giving and Volunteering Survey by the Independent Sector asked why people volunteer. The most important reasons were (a) feeling compassion for those in need (86%), (b) having an interest in an activity or work (72%), (c) gaining a new perspective on things (70%), and the importance of the activity to people the volunteer respects (63%) (Independent Sector, 2001).

Crompton (1999) says that people never volunteer without *expectations* and the supervisor must try to find out what those goals and expectations are and then help volunteers to attain them. Managers need to keep in mind that people who volunteer under pressure can cause resentment and a lack of commitment that can negatively affect the organization (Powers, 1998).

Scott (1996) says that sharing and distributing information is the first step to keeping volunteers motivated and involved and that responsibility and trust are high motivators. Volunteers respond with demands for

more significant assignments, and even for a hand in policy making (Kaplan, 1979). In a collaborative planning research study, Myers (1995) found that goal achievement and project implementation are important organizational factors influencing members' personal satisfactions. All members need to feel that their input is important (Crompton, 1999; Myers, 1995; and Scott, 1996).

Volunteers report psychological benefits including higher levels of self-esteem and energy and lower levels of depression than nonvolunteers (Powers, 1998). Many volunteers derive great personal satisfaction from being able to apply the expertise they gained from their former careers (Winter, 1998a). Volunteers also have healthier attitudes about aging (Powers, 1998). Even people with poor health report benefiting from volunteer activities (Powers, 1998).

Professor Donald J. Tobias, who taught a course, *Introduction to Nonprofit Management*, at Cornell University found that volunteers are becoming more selective about their involvement (Mackin, 1998). Volunteers question the impact and results of what they do, and they need clear and credible information from the nonprofits where they volunteer. They vote with their feet. If they don't have a positive experience, they will walk away (Mackin, 1998).

The idea that an individual would make significant personal sacrifices for another person has long fascinated students of social behavior (Clary, Snyder, Ridge, Copeland, Stukas, Haugen and Miene, 1998). Caldwell and Andereck (1994) found that the most important reason for joining and continuing membership in a recreation-related voluntary association was to contribute to society. They found that the least important reason was for an incentive or material benefit. They also found that women in a voluntary organization ranked making a societal contribution at a higher importance than did men.

Beyond altruistic motives, the volunteer often has self-interested motives that could be extrinsically or intrinsically driven. Volunteers may desire social interaction, affiliation and belonging; status, prestige or power; personal growth, achievement and a sense of accomplishment; and self-image enhancement or for a sense of self-worth and value (Crompton, 1999).

Scott (1996) says volunteer motivation needs may include combating loneliness, using the most of free time, a stepping stone to further self-interests, support of the cause, or just wishing to help. For example, Myers (1995) found that a number of respondents strongly emphasized informal [social] networks established through

participation as more important than tangible outcomes. For some people, volunteering is a recreational activity (Crompton, 1999). Scott (1996) says that satisfying these needs will keep the volunteers coming back, often bringing new recruits with them.

Dennis and Zube (1988) studied incentives, motivations and environmental concern for voluntary association membership in environmental and outdoor recreation associations. They considered outdoor recreation as a political social movement. Members of associations were found to be significantly different than nonmembers on several variables (Dennis & Zube, 1988). A common thread of intellectual pursuit distinguished members from nonmembers, suggesting that intellectual benefits may help define the relationship between outdoor recreation and associational affiliation behaviors (Dennis & Zube, 1988).

Voluntary associations are described as expressive and instrumental, dependent on the purpose for which the association was organized. These associations exist to attain collective or public good for society as a whole. (Dennis & Zube, 1988). *Expressive* voluntary associations are created to provide benefits exclusively to members. *Instrumental* voluntary associations seek to generate benefits that accrue beyond their membership alone.

*Volunteer Functional Inventory*

In addressing the questions of why do people volunteer? and what sustains voluntary helping?, Clary, Snyder, Ridge, Copeland, Stukas, Haugen and Miene (1998) developed the Volunteer Functions Inventory (VFI) to address functions potentially served by volunteerism. Clary et al. (1998) define functional analysis as an "approach that is explicitly concerned with the reasons and the purposes, the plans and the goals, that underlie and generate psychological phenomena, that is, the personal and social functions being served by an individual's thoughts, feelings, and actions". The key themes of functional analysis that have contributed to the understanding of phenomena and processes in the realms of attitudes and persuasion, social cognition, social relationships, and personality also hold the promise for unraveling the complex motivational foundations of volunteer activity (Clary et al., 1998).

A functional approach proposes that continued participation depends on the person-situation fit, such that volunteers who serve in roles that match their own motivations will derive more satisfaction and more enjoyment from their service and be more likely to intend to continue to serve than those whose motivations are not

addressed by their activities (Clary et al., 1998). The functional approach to volunteerism is predicated on the assumption that the motivations underlying volunteer activity can be identified and measured with some degree of precision (Clary et al., 1998).

Building upon previous research, Clary et al., (1998) designed a 30-item instrument to assess six functions potentially served by volunteerism:

1. *Value*: a value expressive (quality of expressiveness) function, helping people express deeply held values, dispositions and convictions. Values relate to altruistic and humanitarian concerns for others.
2. *Understanding*: a knowledge function, bringing a sense of understanding to the world. An opportunity for new learning experiences and the chance to exercise knowledge.
3. *Social*: a social adjustive function served when attitudes help people fit in with important reference groups. Motivations concern relationships with others. An opportunity to be with one's friends or to engage in an activity viewed favorable by important others.
4. *Career*: a utilitarian function by which attitudes reflect experiences with rewarding and punishing

events. Career-related benefits may be obtained from participation in volunteer work. A means of preparing for a new career or of maintaining career-relevant skills.

5. *Protective*: an ego defensive (externalization) function, buffering people against undesirable or threatening truths about the self; and

6. *Enhancement*: a positive ego function that enhances positive strivings such as personal development, growth and self-esteem.

The VFI is meant to cover motivations of generic relevance to volunteerism (Clary et al., 1998). The VFI was first tested with two populations: people actively involved as volunteers, mean age 40.9 years, and university students taking an introductory psychology course, mean age 21.25 years. Multiple factor analysis confirmed the six functions served by volunteering were consistent in both studies. Each function is distinct and evident in the responses of actual volunteers. Internal consistencies (Chronbach's alphas) for each scale in each study were also similar; all were .80 or above. The two studies had high coefficients of congruence and a test-retest (third study) confirmed reliability of the VFI scales (Clary et al., 1998).

To validate the VFI, two more studies examined the importance of matching the motivations of the individual and the opportunities afforded by the environment. Six advertisements that asked readers to become volunteers were created, each advertisement advocated volunteerism as a means toward a set of ends relevant to one of these six motivations (Clary et al., 1998). Student participants judged each advertisement as effective and persuasive to the extent that it matched their personal motivations in the VFI (Clary et al., 1998). Older hospital volunteers identified the VFI the functions important to them in their volunteer service. Several months later, these volunteers indicated the extent to which they received function-specific benefits during their service and the degree to which they found their volunteerism personally satisfying and rewarding.

The results of studies showed that "volunteers for whom a particular function was important and who perceived relatively greater benefits related to that function were more satisfied with their volunteerism than those who did not receive as much in the way of relevant benefits and for whom that functional dimension was not important" (Clary et al., 1998).



Another study used university students who were required to do community service as a degree requirement. These students evaluated the role of individuals' motivations for volunteering and the benefits they receive for volunteering in influencing their intentions to continue their involvement in and commitment to volunteerism (Clary et al., 1998). Participants completed the VFI and demographic and attitudinal measures at a first meeting. Twelve weeks later participants completed a follow-up survey that asked them for their perceptions of the benefits they received from their service, how satisfied they were with the activity they chose, and whether they intended to continue as a volunteer short-term and long-term (Clary et al., 1998). The results showed that volunteers who received benefits to their primary functional motivations were not only satisfied with their service but also intended to continue to volunteer in both the short- and long-term future. Thus the results of this study represent an important extension of the functional analysis of volunteerism, with the matching of the plans and goals of individuals to achieving those plans and goals predicting their intentions concerning future behavior. The outcome crucial to volunteerism can be connected to the

planfulness and agenda-setting aspects of functional approach to motivation (Clary et al., 1998).

*VFI Summary*

Clary et al. (1998) found that (a) The collective results show that each of the six VFI scales measures a single, stable, nonoverlapping construct that coincides with a theoretically derived motivation for volunteering, (b) The present findings attest to the psychometric soundness of the VFI, (c) Exploratory and confirmatory analyses conducted on different and diverse samples consistently revealed remarkably congruent factor solutions, suggesting a reliable and replicable six-factor structure, (d) The individual scales of the VFI demonstrated substantial internal consistency and temporal stability, and (e) The VFI also performed as expected in tests of functionally derived hypotheses.

Clary et al. (1998) also found that (a) people's responsiveness to persuasive appeals was greatest when the appeals addressed motivational concerns of importance to them, and moreover, (b) the findings that volunteers who received benefits congruent with personally important functions had greater satisfaction with their volunteer activity and greater intentions to continue to volunteer in the future.

Clary et al. (1998) conclude that "motivations may guide the agendas that people pursue as volunteers, not only by moving people to volunteer but also by defining what features of volunteer experience will constitute fulfillment of those motivations, with consequences for the satisfaction that volunteers derive from their service and their intentions to remain committed to their roles as volunteers." Items in the VFI give a core set of functions underlying volunteering in general. There very well may be meaningful variations in the ways in which these core functions are manifested depending on the specific volunteer activity that an individual contemplates or actually performs (Clary et al., 1998).

The VFI research is more a matter of there being a diversity of motivations that, in the lives of the individuals who harbor those motivations, set the stage for the events that will determine what will draw people into volunteering, whether their experiences as volunteers will be satisfying ones, and whether the benefits they attain from volunteering will be translated into intentions to continue to be active as volunteers, and ultimately sustained helping over time" (Clary et al., 1998).

The researchers recommend that future research should document that these intentions will actually be translated

from the realm of self-reported statements of intention into behavioral manifestations of sustained helping over extended periods of time (Clary et al., 1998).

#### *Environmental Volunteers*

Ryan, Kaplan, and Grese (2001) studied volunteers' *motivations for continued participation* in natural environmental stewardship programs. This study evaluated the relationship between volunteer commitment and motivation, as well as the effect that volunteering has on participants' behavior and attitudes toward the environment. The researchers were interested in looking at volunteers in terms of how long they had served, how frequently they volunteered and also how strongly committed they were to these activities. The study participants were 148 volunteers from three environmental stewardship programs in Michigan, who had participated at least 1 year at their organization. Fourteen percent of the volunteers were age 60 or older. The study group was divided almost evenly between women and men.

Most of the questions involved structured items that focused on the following constructs:

1. *Motivations for continued participation.* The list of 19 reasons for or benefit from participation included items relating to learning, helping the

environment, social and recreational benefits, reflection and project organization.

2. *Change in environmental outlook.* The 27 items covered topics such as knowledge about the natural environment, *attachment* to natural areas and appreciation for natural areas, as well as changes in actions toward the environment, such as becoming an advocate for the environmental movement, involving natural areas and volunteering as part of one's recreation or vacation plans and developing native habitats in one's own yard.

3. *Attachment to natural areas.* Using the notion that attachment may be most apparent when a place changes, this question asked participants what their response would be should decisions be made that negatively changed the natural area where they volunteered. These seven items included emotional responses (e.g. feeling a sense of loss), increased environmental activism and relocating one's volunteer and recreation activities to another natural area.

4. *Expertise.* The survey included 10 environmental knowledge or experience domains and asked participants to rate each in terms of their level both when they began volunteering and at the present time.

5. *Level of activity*. Participants were asked to indicate their level of activity with respect to 11 specific kinds of stewardship efforts.

6. *Commitment*. The survey included three items to gauge the *strength of commitment* to the volunteer efforts: (a) the degree to which volunteering was a high priority; (b) whether their participation depended on time or activity; and (c) how regularly they volunteered.

The survey also included demographic variables such as age and gender as well as distance to volunteer site and length of residence.

Ryan, Kaplan, and Grese (2001) came to many conclusions from their research:

1. Helping the environment and learning were important initial motivations. Other motivations, including social factors and project organization, were found to be significant predictors of volunteer commitment.
2. Volunteers expressed a range of benefits from their participation. The most important benefit involved the opportunities that volunteer stewardship projects provided to take 'meaningful action', which is related to altruistic notions. Another important

benefit was 'fascination with nature' or learning how nature works. Heritage volunteers could have a similar benefit - fascination with history or culture.

3. Those who volunteered more frequently indicated a higher satisfaction with the benefit of volunteering. They said that volunteer commitment is more related to the frequency of participation than to the length of time that the volunteer has been participating in a program. Having regular and frequent volunteer opportunities may be important for building commitment. Active volunteers were significantly more likely to have friendships in the group (i.e. social motivations).

4. The role of knowledge or expertise as a significant factor in both commitment and duration of volunteering suggests that the investment in learning increases the desire to continue to volunteer. However, those who already consider themselves to be more expert in their knowledge and skills of natural areas may be less motivated to learn new things as part of their volunteer activities and may need other activities to maintain commitment.

5. Volunteer environmental restoration activities may be more important in developing an *attachment* to

local natural areas in general rather than specifically to one's volunteer site. Volunteers, however, do have a strong place attachment to their volunteer sites, which appears to be a result of their volunteer efforts, their personal feelings for these natural areas and a readiness to defend them from negative changes. Those with high social reasons for volunteering were much more likely to show attachment to the volunteer site. Many of the volunteer activities are, in fact, social events.

Stewardship programs that take into consideration volunteers' motivations at different stages of their participation have the opportunity to nurture both individual growth and the environment (Ryan et al., 2001). This survey format and the VFI could be adapted for heritage volunteers.

### *Volunteer Management*

While nonprofit institutions were considered marginal to American society a generation ago, today those institutions are one of the most important distinguishing features of American democracy and capitalism. Non-profits are beginning to behave like for-profits in terms of accountability. Recruiting, developing and retraining volunteers are becoming an important part of the nonprofit



mission, since much of the work they do is performed by volunteers (Mackin, 1998). It is the important to put time and effort into volunteer management (Winter, 1998a). Effective nonprofits treat volunteers as colleagues and staff members and some no longer use the word "volunteer" (Mackin, 1998). "In exchange, volunteers don't approach their work as an afterthought, but instead bring to it all their competence," says Cornell professor Tobias (Mackin, 1998).

Ronald Kinnamon, a YMCA director, identified these 13 barriers to recruiting and retaining volunteers (Winter, 1998c) [Quoted]:

1. Potential volunteers feel they do not have enough time.
2. They don't feel the organization really needs them.
3. They don't believe volunteering will really make a difference.
4. They don't feel welcomed by the paid staff.
5. They feel they might fail.
6. They lack a background in volunteering or a role model for volunteering.

7. They are not given an opportunity to buy into the mission of the organization and understand how their role accomplishes the organization's mission.

8. No one asked them to volunteer, or told them they were needed.

9. There are no structural barriers, including the location of where the volunteering takes place, the hours during which it takes place, a lack of child care, inflexibility in volunteering opportunities, lack of liability insurance, and lack of transportation.

10. Volunteer tasks are too routine.

11. Volunteers aren't offered enough training.

12. Volunteers aren't offered enough recognition, and

13. Volunteering experience doesn't provide a sense of community, a place to feel cared about and to do constructive work that makes a difference.

As never before, volunteers expect professional treatment from their volunteer managers, including accurate volunteer position descriptions, high-quality training and performance evaluations, terms of office that promote an infusion of new ideas, and flexibility in all areas of volunteer activity (Winter, 1998b). The task of managing

volunteers should be a position in of itself (Winter, 1998b).

Managers need to match individuals to specific tasks they would particularly enjoy or be well suited for (Winter, 1998b). People come with needs and motives important to them and volunteer service tasks do or do not afford opportunities to fulfill those needs and motives (Clary et al., 1998). Together these features of persons and of situations are integrated in the agendas that individuals construct and enact as they seek out, become involved in, and continue to be involved in the sustained helpfulness of volunteerism (Clary et al., 1998). For example, satisfying, shorter-term volunteer opportunities may be one way of preventing burnout (Winter, 1998b).

#### *Marketing to Volunteers*

The functional approach discussed by Clary et al. (1998) suggests that underlying the decision to volunteer is a process by which individuals come to see volunteerism in terms of their personal motivations. Their research found that one way that individuals can come to view volunteering this way is through exposure to persuasive messages. People may be recruited into volunteer work by appealing to their own psychological functions (Clary et al., 1998).

Clary et al. (1998) believe that matching messages to motivations enhances persuasive impact. Organizations dependent on the services of volunteers could use the VFI to assess the motivations of potential volunteers, or groups of potential volunteers, and then use this information to strategically promote their organizations in ways that speak to the abiding concerns of the volunteers they seek to recruit (Clary et al., 1998).

Considerations of ongoing, planned helping behavior also point to the influence of person-based processes of helping (Clary et al., 1998). Planned helpfulness represents a phenomenon in which the salient cues for action are less demanding, at least in comparison to emergency situations; instead it engages processes that encourage individuals to look inward to their own dispositions, motivations, and other personal attributes for guidance in deciding whether to get involved in helping, in the selection of a helping opportunity and in the maintenance of helping over an extended course of involvement (Clary et al., 1998).

#### Older Adults as Recreationists and Volunteers

With time as the biggest barrier to our volunteer efforts, the availability of mid-lifers (aged 40-60) who have unprecedented amounts of unfettered time, bodes well

for volunteer groups (Powers, 1998). Barriers to overcome to attract mid-life volunteers include changing society's attitude toward volunteering and knowing the motivations for volunteering (Powers, 1998). A national college conference held in spring 1998 on life cycles and volunteering examined the impact of work, family, and mid-life issues on volunteering, with special emphasis on trends among those aged 40 to 60 (Winter, 1998c & Powers, 1998).

### *Gerontology Research*

#### *Education*

Education and cultural interests are key motivators why older adults visit heritage tourism sites and could be major motivators why older adults volunteer at heritage tourism sites. Intellectual development is fostered through an individual's (a) orientation toward learning and (b) accumulated educational experiences (Dennis & Zube, 1988). The importance of intelligence in the aging process is discussed in the gerontology literature.

Goldman, Klatz, and Berger (1999) discussed the results of two prospective studies on aging: The Seattle Longitudinal Study and the Baltimore Longitudinal Study on Aging. Those people who aren't missing a mental beat in their senior years share several qualities including: (a)

they regularly do a variety of activities, such as reading, traveling, attending cultural events, joining professional associations and clubs, and pursuing further education; (b) are open to and quickly able to grasp new ideas; (c) are flexible and willing to change; (d) have above-average education and income; and (e) are satisfied with personal or professional accomplishments. On the other hand, the researchers found that the attitudes or activities common to people who suffered mental deterioration through the years included strict adherence to a routine and dissatisfaction with life.

Lifelong learning was a characteristic of most of the best examples of successful aging in the Harvard Study of Adult Development (Vaillant 2002). Marilyn Albert, a Harvard professor and Director of Gerontology Research at Massachusetts General Hospital, looked at the capacity of seniors over age 80 to enhance natural intelligence. She concludes: use it or lose it. She says there are four key ingredients to staying smart: "(a) education; (b) strenuous physical activity, which improves blood flow to the brain; (c) strong lungs, which helps delivers well-oxygenated blood to the brain; and (d) feeling a sense of purpose about one's life." (Goldman, Klatz, & Berger 1999, p. 20-21)

Robert Sternberg, a psychologist at Yale University, says intelligence has three components: the internal thought process (analytical), application to a person's daily environment (creative), and the application of new learning (psychological or intuitive) (Goldman et al., 1999, p. 17).

Goldman et al (1999) identify four styles of learning: "(a) auditory learning, (b) hands-on learning, (c) verbal learning and (d) visual learning. One of the sturdiest defenses against Alzheimer's disease involves a decision relatively early in life to develop and use your mind." (p. 24-25). "Study after study shows that a person's level of education and the mental demands of an occupation or daily activities can guard against dementia" (p. 213). "Assuming generally good health, people begin showing signs of mental aging around age sixty, and for some, there are few signs of change until their seventies or eighties" (p. 54).

On the other hand, among the many other significant findings to emerge from the Harvard Study of Adult Development are learning to play and create after retirement, and learning to gain younger friends as we lose older ones add more to life's enjoyment than retirement income (Vaillant, 2002). Further, the lives of all three cohorts in the study repeatedly demonstrated that it was

social aptitude - sometimes called emotional intelligence - not intellectual brilliance or parental social class that leads to a well-adapted old age (Vaillant 2002).

Vaillant (2002) reported that Csikszentmihalyi interviewed a large number of people in their 70s who had been highly creative in their youth. Csikszentmihalyi demonstrated a clear relationship between continued creativity and successful aging. Csikszentmihalyi also noted that "often their interest had broadened to include larger issues: politics, human welfare, the environment and occasionally transcendent concerns with the future of the universe" (Vaillant, 2002, p. 239).

One of the six tasks in Vaillant's (2002) model of adult development is *Generativity*. Vaillant says research reveals that between age 30 and 45 our need for achievement declines and our need for community and affiliation increases. In the adult development study, mastery of Generativity tripled the chances that the adult's decade of the 70s would be a time of joy and not of despair. The adult becomes "The Keeper of the Meaning" which involves passing on the traditions of the past to the next generation (p.48). The focus of Keeper of the Meaning is on conservation and preservation of the collective products of mankind - the culture in which one lives and its



institutions. The Keeper of the Meaning speaks for past cultural achievements and guides groups, organizations, and bodies of people toward the preservation of past traditions (p.49).

*Leisure Satisfaction of Older Persons*

Kaplan (1979) discussed a 1960 study by the Institute of Gerontology of the State University of Iowa which listed the following "needs and drives" of the elderly in respect to leisure:

1. Need to render some socially useful service.
2. Need to be considered a part of the community.
3. Need to occupy their increased leisure time in satisfying ways.
4. Need to enjoy normal companionships.
5. Need for recognition as an individual.
6. Need for opportunity for self-expression and a sense of achievement.
7. Need for health protection and care.
8. Need for suitable mental stimulation.
9. Need for suitable living arrangements and family relationships.
10. Need for spiritual satisfaction.

### *Older Person's Motivations*

Mannell, Zuzanek and Larson (1988) studied perceived freedom and intrinsic motivation of older retired adults using the Experience Sampling Method to determine if flow experiences promoted by Csikszentmihalyi are more prevalent in conditions predicted by theorists that foster leisure states. Freely chosen but intrinsically motivated activities produced the highest levels of intrinsically rewarding flow. These activities appeared to demand more effort, commitment and obligation than the activities some models describe as pure leisure. These activities could be considered a form of serious leisure. It appears that a high proportion of activities may have been involved in some sense of obligation or commitment beyond immediate enjoyment.

Losier, Bourque, and Vallerand (1993) developed a *motivational* model of leisure *participation* of 102 older Canadian persons to examine the factors that may encourage *involvement*. The model confirmed that perceptions of leisure *opportunities* enhanced leisure motivation whereas leisure *constraints* undermined leisure motivation; motivation in turn strongly predicts leisure *satisfaction*, which leads to *participation*. The results showed that the subjects were more self-determined and intrinsically

motivated toward leisure, were mostly satisfied and fairly active. Only marital status and gender sociodemographic variables were related to leisure satisfaction or leisure participation. Elderly individuals who were not married experienced greater leisure satisfaction than those that were married and women tended to be more involved than men. The researchers conclude that motivation is an important determinant of the quality of the leisure experience, is a good predictor of leisure satisfaction, is an important factor to consider in research dealing with the elderly, and supports the concept of a self-determination continuum. Further, leisure satisfaction could be either a determinant or a consequence of leisure participation. Aging retired persons who often see a reduction in social activities may maintain social involvement with increased leisure participation.

#### *Older Volunteers*

Growing numbers of older adults are seeking meaningful retirement and activities. Volunteerism can be equated positively with leisure activity, thus there is a good match for older adults and leisure organizations (Tedrick, Davis, & Coutant, 1984). Successful retirement and successful leisure depend on cultivating or renewing old interests and developing new ones. The study of older

volunteers who help school children in Ithaca, New York found that volunteering offers much to the volunteers themselves (Winter, 1998a).

A study of retired volunteers in Ithaca, New York reported these secrets of success (Winter, 1998a) [quoted]:

1. The volunteer activity is positive in nature, rather than remedial.
2. The volunteer activity is fun.
3. Volunteer time commitments do not exclude other retirement priorities such as family and travel.
4. The organization is inclusive welcoming retired staff, spouses and friends.
5. The intergenerational mix benefits both the retirees and the children.
6. The previous career experiences of the retirees provide the expertise necessary for establishing a stable, efficiently functioning organization.

Mid-lifers or baby-boomers present a challenge to volunteer organizations, which must determine how they can engage and motivate them and put their vast talents to work (Powers, 1998). Life-course research shows that mid-lifers have good health and unfettered time and are creating their own life course and shaping it themselves (Powers, 1998). Winter (1998b) reports that baby boomer women, many of whom

have had careers outside the home, are bringing workplace practices to their volunteer service activities.

A survey of the 975 academic and practitioner life cycle and volunteering conferees found that characteristics of a successful volunteer experience include (Winter, 1998b) [Quoted]:

1. opportunities to learn,
2. to use their talents in meaningful ways,
3. to grow in leadership and experience,
4. to have fun and be stimulated in new areas, and
5. to make friends and feel part of a larger group.

Volunteer opportunities are more likely to appeal to baby boomers if volunteer managers (Powers, 1998) [Quoted]:

1. Recognize the desire for short-term, goal-oriented volunteer assignments.
2. Give volunteers as many options for their schedules and work locations as possible, including "virtual volunteering" assignments.
3. Offer true life-long learning experiences.
4. Allow volunteers to participate with other family members, or with friends, or to make new friends.
5. Challenge people to learn new skills as well as apply past experience while respecting the expertise volunteers bring with them.

6. Give authority as well as responsibility - reflect this in titles and volunteer job descriptions.
7. Mirror the business world's evolving model of project-based "consultant" rather than the old model of permanent "employee" - which also implies new approaches to teamwork rather than hierarchical "supervision."

Donna Anderson, president of the National Retiree Volunteer Coalition in 1998 said that she has seen how volunteerism invigorates mid-lifers. Ms. Anderson says "we're now spending more than 30 percent of our lives in retirement. Success in recruiting volunteers in mid-life will depend on creating programs that realistically take their life circumstances into account" (Powers, 1998). Ms. Anderson says it offers retirees opportunities to (Powers, 1998):

1. Rediscover the satisfaction of helping people.
2. Use their experience to help solve critical community needs.
3. Develop new skills, and
4. Open alternative career paths.

#### *Older Heritage Volunteers*

A Mersey Heritage Trust restoration project in Liverpool, England (Place, 2002) specifically attracted

older people (50 and over) into volunteering and to work in a multi-generational setting. The purpose of the study was to evaluate how and what older persons *learn* at heritage sites. The older volunteers were persons with disabilities, early retired people, and older retired persons looking for ways to apply skill, experience and time. Some volunteers had experienced personal difficulties such as isolation, loneliness and poor health. Most were disinterested in engaging in learning in a formal sense, i.e. classroom. Because of the physical nature of work available, the majority of participants were men. Observers noted volunteer learning progress throughout the project using photographs, videos, diaries, logs and digital records. Volunteers worked in multi-generational teams where they imparted their experience on the younger workers and served as role models. Volunteers learned practical skills and were motivated to read and research background information for archiving. Many older volunteers had a renewed confidence in themselves and in their ability to learn.

## CHAPTER 3-METHODOLOGY

### Type of Research

This study used descriptive nonrandom research methods that incorporated and modified parameters from existing leisure and volunteering instruments. An expert panel review and pilot study were conducted prior to the sampling. A population of heritage tourism sites was identified in the geographic research area. A variety of types of heritage tourism sites were contacted to participate. In selecting sites, this researcher had no prior knowledge of the site volunteer populations and had minimal influence on the selection of the volunteer samples. In most cases, heritage tourism site managers selected the volunteers who were available during the sampling period and distributed the pre-assembled survey packets. Participants completed self-administered paper questionnaires and returned the sealed forms to this researcher through direct mail or to the site manager, who collectively returned them. Minimal follow-up contact was made to improve response rates. Information request cards about this research were provided to all participants and returned by many. Volunteer contact information was kept confidential and separate from the questionnaire responses.



### Objectives

This research investigated adult volunteers at heritage tourism sites in southwestern Pennsylvania and northern West Virginia to mainly identify their sociodemographic characteristics and motivations for volunteering. Other parameters included: (a) history of volunteering, (b) level of interest in heritage tourism, (c) level of satisfaction with the heritage organization's program for managing and retaining volunteers, (d) type of benefits received, (e) original reasons for volunteering, (f) level of commitment, (g) constraints and facilitators to volunteering, (h) social consequences; and (i) attachment to activity and place. The study emphasized populations aged 50 or older. The heritage tourism organizations also provided general background information.

The study specifically focused on developing a model to explain the factors that affect motivations of heritage tourism volunteers. The results were analyzed to identify the significance of characteristics, factors and any relationships. The study answered 12 research questions and other general questions which are repeated here.

### Research Questions

This descriptive research study included the following questions and other parameters.

Q1 What is the frequency of adult volunteering in general and in particular at heritage tourism sites? Do older adults volunteer more than other age groups?

Q2 What are the motivations of adult volunteers at heritage tourism sites?

Q3 What type of benefits do adult volunteers at heritage tourism sites experience - intrinsic or extrinsic?

Q4 What are the social and psychological benefits of adult volunteers at heritage tourism sites?

Q5 What is the level of place attachment for adult volunteers at heritage tourism sites?

Q6 What is the level of activity attachment for adult volunteers at heritage tourism sites?

Q7 What are the education levels of adult volunteers at heritage tourism sites? Are older volunteers at a higher education level than the average adult American?

Q8 What are the income levels of adult volunteers at heritage tourism sites? Are older volunteers in a higher income class than the average adult American?

Q9 What is the gender distribution of adult volunteers at heritage tourism sites? Do older women volunteer more than older men?

Q10 What is the history of volunteering of adults at heritage tourism sites? Do older volunteers have a history

of volunteering for various causes and organizations throughout their lifespan?

Q11 What are the volunteering constraints or facilitators (e.g., managerial site conditions, physical mobility, transportation access, free time, personal health condition) that are important factors for involvement of adult volunteers at heritage tourism sites?

Q12 What is the level of satisfaction felt by adult volunteers at heritage tourism sites with the volunteer recruitment and retention methods?

The subjects were evaluated for these characteristics:

1. Demographics: age, race, sex, income level, educational level, major current or last occupation type, citizenship, state of origin of the subjects marital status, and perceived level of health.
2. Heritage tourism interest/specialization level in general and specific to the site;
3. Volunteer data: When it began - the age when the person first volunteered for any cause, the length of service as a volunteer in general and as a volunteer at the site, frequency of participation how much time do volunteers invest, participation with family or friends, and length and duration of travel to the site;

4. Personal satisfaction level with the volunteering opportunity and the volunteer management practices; and

5. Type of benefits received. The types of volunteer benefits may include: volunteer compensation, educational opportunity, social contact, skills enhancement, improved self-concept or awareness, or improved psychological situation (e.g., less stress).

For general background information, the heritage tourism organization was asked:

1. Site information: type of site, number of visitors a year, number of full time employees, and operating seasons and days a year;

2. Volunteer information: number of paid and unpaid volunteers recruited a year; and

3. Volunteer procedures: e.g., recruitment, hiring, and firing performance evaluation, and reward.

#### Measurement Instrument Research

##### *Type of Instrument*

Havitz and Dimanche (1999) studied 52 research articles and found that nearly all leisure involvement research had been collected using survey methodologies (47 of 52 data sets); five studies were laboratory experiments. All 52 studies collected data via paper and pencil questionnaires, although two studies also included personal

interview components. Most of the studies mentioned in this report also used paper self-administered questionnaires.

### *Scale of Measurement*

Likert-type response formats are commonly used in leisure research instruments and the scales vary from three to ten points.

#### *Five point scales*

The leisure motivation instrument developed by Beard and Ragheb (1983) used a five-point "true-untrue" response scale. The involvement instrument developed by Dimanche, Havitz, and Howard (1991) used a multiple-item scale with a five-point format with no more than three items in each subscale. Guinn's (1995) leisure satisfaction instrument used a five-point scale (almost never true to almost always true). In their study of volunteer costs and benefits, Handy, Cnaan, Brudney, Ascoli, Meijs, and Ranade (2000) used a five-category scale to define a volunteer. Ryan, Kaplan, and Grese (2001) used five point scales in their study of motivations for continued participation.

#### *Seven point scales*

The Intrinsic Leisure Motivation Scale discussed by Weissinger and Bandalos (1995) used a seven-point response range from 1 = very strongly disagree to 7 = very strongly agree. Clary et al.'s (1998) Volunteer Functions Inventory

(VFI) uses a seven point response range from 1 = not at all important/accurate to 7 = extremely important/accurate. For their constraints study, Alexandris, Tsorbatzoudis, and Grouios (2002) used a seven point Likert-type scale ranging from 7 = very important to 1 = to not important.

#### *Ten point scale*

The Experience Sampling Method discussed by Mannel, Zuzanek and Larson (1988) and the rural tourism attribute scale developed by Chen and Kerstetter (1999) used a ten-point scale.

#### *Combination scales*

The leisure motivation/satisfaction model for the elderly developed by Losier, Bourque, and Vallerand (1993) used five and seven-point scales. For the study of leisure participation and motivation, Lounsbury and Hoopes (1988) used a five-point scale on one instrument and a seven point response scale on another instrument. Kerstetter, Confer, and Graefe (2001) used more than one type of scale in their specialization study of heritage tourists: (a) motivation - three-point scale; (b) perception of authenticity - five-point scale; and (c) level of satisfaction - nine-point and ten-point scales.

The wide variety of research scales prompted Samdahl (1991) to explore whether leisure should be measured as a

categorical or interval phenomenon using a 7-point Likert response scale. Samdahl (1991) asked: "Does leisure exist or not exist or can it exist in amounts that incrementally lead to pure leisure? (p. 87). The data distribution showed a persistent bimodal nature such that the prevalence of experiences fell somewhere between the bimodal extremes. That analysis supported the use of a 3 to 5 point incremental scale for the direct measurement of leisure experiences.

#### *Sampling and General Data Collection*

The volunteer samples drawn by Handy et al. (2000) were not random and were of convenience. The voluntary association samples drawn by Dennis and Zube (1988) were random. The samples drawn by Caldwell and Andereck (1994) were randomly selected from a systematic sample of the volunteer association's membership.

Dennis and Zube (1988) followed survey instrument design principles described by Dillman. They sent 1500 questionnaire booklets and cover letters then sent follow-up postcards and two subsequent questionnaire mailings to stimulate nonrespondents over an 11-week period. Caldwell and Andereck (1994) sent 500 questionnaires, cover letter and postage-paid return envelope then sent one follow-up postcard one week later to nonrespondents.

Dennis and Zube (1988) collected data on sex, age, employment status, size of home community, annual income, and education level. Guinn (1995) collected data on educational level, perceived health, and selected demographic variables. Chen and Kerstetter (1999) collected data from international students on age, marital status, education level, household status, gender, home country, and past residence.

Caldwell and Andereck (1994) used two attendance questions to categorize volunteers by high, medium and low levels of participation: How often do you visit the [site]? and Have you ever attended special events at the [site]? Caldwell and Andereck (1994) identified individuals who attended special events and who visited the [site] once a year or more as high-level participants. Those who did not attend special events and who visited the [site] less than once a year were considered low-level participants.

#### *Response Rates*

Caldwell and Andereck's (1994) study of membership benefits at a zoological voluntary association and Dennis and Zube's (1988) study of motivations for membership in voluntary associations for outdoor recreationists both had a 74 percent response rate. Siderelis and Moore's (1998) study of site preference of boating sites had a 51 percent



response rate. Chen and Kerstetter's (1999) study of rural Pennsylvania as a travel destination planned for and achieved a 50 percent response rate.

Dolsen and Machlis (1991) reviewed response rates of four different national park surveys conducted in 1988. Social scientists have generally agreed about what constitutes acceptable response rates (Dolsen & Machlis, 1991). Some accept rates as low as 30 percent; others reject anything below 70 percent (Dolsen & Machlis, 1991). Recreationists tend to respond at higher rates due to their interest in the subject studied, as well as their high levels of education (Dolsen & Machlis, 1991). Dolsen and Machlis (1991) found that for homogeneous populations defined in advance, useful data is possible when at least a 65 percent response rate is secured.

#### *Validity and Reliability*

Chen and Kerstetter (1999) used a focus group to refine their list of rural image attributes but they did not do a pre-test. Dimanche, Havitz, and Howard's (1991) validity analysis confirmed the multidimensional construct. Further, Havitz and Dimanche (1997) investigated over 50 leisure involvement studies conducted since 1988 and concluded that multifaceted interpretations have stronger

content and face validity for studying leisure (than do unidimensional models).

*Other concerns*

Prentice (1993) cautioned future researchers about several items when studying motivations for heritage tourist consumption: (a) targeting in terms of likely interest levels will not be precise; (b) retrospective self-reports have an accuracy problem; (c) Use caution in interpreting the reported rates as true rates; and (d) self-rated interest would seem the most consistently discriminating, at least if segmentation based on specific motivations is not to be developed.

Manfredo, Driver, and Tarrant (1996) also cautioned future users of the Recreation Experience Preference (REP) Scales that: (a) time of survey completion may influence an individual's item responses. There may be problems when asking people to recall what outcomes were important when they made their decision to recreate in a specific activity; (b) further examination of the REP scales is necessary to determine whether they are content valid for specific applications other than outdoor recreation that occurs in highly natural settings; and (c) future research should investigate the linkage between attainment of experiences and beneficial human consequences.

*Parameter summary*

The literature review identified 18 major categories of parameters that have been included in questions in leisure involvement and motivation measuring instruments. These categories and sub-parameters are listed in Appendix 1.

*Population and Subject Sample Selection*

Adult volunteers age 18 or older at heritage tourism sites are the subject population. Heritage tourism organizations and sites in the two geographic areas, in southwestern Pennsylvania and northern West Virginia, were identified from local travel and tourist information and other sources such as Internet web pages and printed guide books on heritage sites. A variety of types of heritage tourism sites were picked from the large list of sites. Mailing and telephone information was researched. One criteria was to try to select sites with full-time staffs or a volunteer coordinator. Twenty seven sites were contacted in total; 17 agreed to participate. For convenience to the researcher, two sites in Pennsylvania were used in the pilot study which was conducted in May, 2003. The final study of 15 sites was conducted in July and August, 2003.

The first step was to contact a management person at the heritage site to determine whether their site used volunteers and if so, would they want to participate in the study. The original intent was to ask the manager for a list of volunteer names and addresses to allow direct distribution of the survey packets. This strategy was changed when most sites would not disclose confidential volunteer information without first asking the volunteer. The site contact was asked to give an estimate of the number of volunteers at the site and how many might participate in the research time period. Three sites required submission of the questionnaires for pre-approval. One site declined to participate at this stage due to the questionnaire length and types of questions.

#### Survey Distribution

The site contact was asked to select the best distribution method for their situation (i.e., personal workload, and seasonal availability of volunteers). The distribution methods included (a) direct distribution and pick-up by this researcher, (b) distribution to the site contact then to the volunteers, (c) collection and return by the site contact or (d) direct mail return to this researcher. The contact person also might have mentioned any special events where a large number of volunteers would

be used where distribution of the questionnaires could be handled for everyone at the same time. Sampling periods were adjusted to include some of those events.

In most cases, the survey packets were mailed to the site contact who distributed them to the volunteers then collected and returned the sealed questionnaires after the allotted time period (usually two weeks). Many site contacts preferred direct pre-posted mail return or postage re-imbursement to the site. A cover letter explained to the site contact the reasons for the research and the simple process to distribute the survey packets. A separate cover letter to the volunteer was inside the first page of the volunteer questionnaire. One criteria was to select volunteers who had been engaged at the site within the last two years. No other training or instruction was provided to the site contact or volunteer.

The site contact was to give the survey packets to the volunteers who worked at the site during the sampling period. Sampling bias may have occurred if the site contact instead selected specific volunteers rather than giving the survey packets to the first volunteers who arrived at the site. Some volunteers may also have declined to participate. The types and number of volunteers who were

available during the sampling period was not known to this researcher.

This researcher did hand-deliver survey packets to four sites and returned to one site to collect the sealed responses. Two of those sites returned the sealed questionnaires by mail. Only one site contact required this researcher to distribute and collect the questionnaires on the same day. That site also allowed collection of other volunteer names and addresses to follow-up by mail when more volunteers were available than survey packets. No other volunteer names were identified during this step. Another site contact declined to participate after reviewing the questionnaire with management and one volunteer; all survey packets were returned unused and were not counted in the sample.

#### Sampling Calculations

The volunteer sampling plan factored in the minimum return rate estimated to be 65 percent based on the study by Dolsen and Machlis (1991). The questionnaire targeted persons aged 18 years or older who volunteer at the selected heritage tourism sites. This age group was necessary to avoid more extensive university requirements for human subjects research.

To limit the time and costs of this study, the sampling goal was to receive a minimum of 150 returned volunteer mail questionnaires. At a 65% response rate, a minimum of 230 volunteers must be available at the organizations to achieve 150 returned questionnaires. A formula provided by Krejcie and Morgan, (1970) indicates that if the sample is random, had 1 degree of freedom (chi-square value of 3.842) and a degree of accuracy expressed as .05, a sample size of 150 would require a sampling population of 240 to 250. This sample was nonrandom. The final number of sites and volunteers sampled was 17 and 303, respectively.

#### Confidentiality

Organization managers and volunteers were asked their permission to conduct the study. Participants were assured that the information given would remain confidential and not identifiable to them. Note cards were provided for the volunteer to complete if they wanted more information about the study results; this information is kept separate from the data.

#### Research Design

The procedures for research design follow those described by Mayfield and Crompton (1995) and other researchers. Procedures used to develop the standardized

instrument will include a review of the literature and instruments from similar research (Ryan, Kaplan, and Grese, 2001).

#### *Human Subjects Research*

The West Virginia University (WVU) Institutional Review Board (IRB) requires all researchers to follow established protocols when studying human participants. Prior to content validity and pilot testing, an application for exemption from the standard protocol was submitted to the WVU - IRB for review in late February, 2003. Draft cover letters and instruments for the heritage site managers and volunteers were submitted in an application for exemption. On February 13, 2003, this researcher passed the Internet based IRB Human Participants Protection training to conduct this research. A final decision granting approval to proceed was granted from the WVU - IRB on March 4, 2003.

#### *Content Validity*

Concerns of content validity, which address whether or not all important experience preferences are measured with an instrument, are of primary concern in decisions regarding which scales to administer in a given study (Manfredo, Driver, & Tarrant, 1996).



Prior to the study, the organization and volunteer instruments were submitted to a panel of 6 judges consisting of faculty professors at West Virginia University and heritage site managers who work in the geographic region. The judges performed three functions:

1. Reviewed the organization and volunteer questionnaires to edit and improve item clarity, readability, and content face validity.

2. Reviewed the volunteer questionnaire to rank 41 specific items on a five-point scale to identify the level of importance that a volunteer might place on the question. They added any reasons that they thought was applicable. Likert scale questions pulled verbatim from other research instruments have already been tested and were not evaluated in this step.

3. Reviewed the volunteer questionnaire to place specific items on a three-point scale in the six categories or domains of a volunteer as defined by Clary et al. (1998).

#### *Pretest*

The purpose of an expert panel review was to confirm that the items were correctly categorized, to identify any other domains that were not considered, and to reduce the list of items to a manageable set. Because the main purpose

of the organization's instrument is to collect background data, it was not pre-tested.

A sample of 14 volunteers at two sites in Pennsylvania received the volunteer questionnaire. These volunteers were selected using the same criteria as for the final study. The pilot subjects were asked to complete the questionnaire then provide comments on a form. The subjects were asked to comment on how long the survey took to complete, whether pre-posted envelopes would encourage participation, whether comment cards would discourage participation, and any suggestions for improvement. The pilot documents were delivered and picked up in person by this researcher. After reviewing the feedback, the motivation portion of the questionnaire dropped from 52 to 40 statements. The original intent was not to use the pilot results in the final study. The results were used, however, because only minor formatting changes resulted.

#### *Method, Techniques and Tools*

A survey instrument package included a cover letter explaining the study, the instrument, the comment note card, a pencil and a pre-addressed return envelope. A material incentive of flower seed packet and/or return postage was included. This flower incentive was of nominal cost less than \$.20 each and was not expected to jeopardize

the study's validity. The postage was included if the site contact indicated they did not want to coordinate collection and return of the questionnaires.

Participating sites and organizations were provided the Heritage Organizations Survey (See Appendix 4) and the appropriate number of copies of the Heritage Tourism Volunteer Survey (See Appendix 5).

The heritage organization survey instrument was a self-administered questionnaire which consists of fixed and open-ended questions examining (a) site information: type of site, number of visitors a year, number of full time employees, and operating seasons and days a year; (b) volunteer information: number of paid and unpaid volunteers recruited a year, number and names of volunteers; and (c) volunteer procedures: e.g., recruitment and hiring, performance evaluation, reward, and firing.

The volunteer survey instrument was a self-administered questionnaire which consists of fixed and open-ended questions examining sociodemographic characteristics, volunteer's level of involvement, their perceptions of factors contributing to and constraining their overall satisfaction with the volunteer relationship with the heritage tourism site, and their personal motivations and benefits from volunteering. Qualitative and

quantitative questions were posed. Many of the instrument questions were crafted from the parameters listed in Appendix 1. Many of the 30 volunteer functions inventory (VFI) statements (Clary et al., 1998) and environmental volunteer statements (Ryan et al., 2001) were included in motivation Question 29 in the Heritage Tourism Volunteer Survey. Other questions from Clary et al. (1998) and Ryan et al. (2001) were incorporated directly or rephrased in the volunteer survey. The site questionnaire was designed to address multiple heritage sites; the volunteer questionnaire was not.

Based on Samdahl's (1991) research, fixed questions had a 5-point Likert type scale. Havitz and Dimanche (1997) said that there is evidence that Likert-type involvement items may be sensitive to reverse coding problems because of double-negatives created with respect to the agree-disagree response items. To minimize response errors, they suggested that questions should be phrased to allow some reverse Likert scales to be used. In this case, however, none of the final questions were reversed coded.

The final instrument format and layout was designed to ensure that older adults could easily read and understand all of the questions. Formatting suggested by Salant and Dillman (1994), Patten (2001), Fink and Kosecoff (1985) and

others was used to develop the instrument questions. The actual questionnaires were in booklet form on 8-1/2 by 14 inch paper. The questionnaires were reformatted for insertion in this document.

Appendix 2 includes versions of the cover letters. Cover letters were modified to fit the sampling situation. Appendix 3 includes the final questionnaire for heritage site organizations. Appendix 4 includes the final questionnaire for heritage site volunteers.

#### Collection of Data

The data was collected from managers and volunteers at 17 heritage tourism sites: two pilot and 15 final study sites. The physical locations where the questionnaires were completed were the heritage tourism site, their personal residence or workplace. The number of heritage site questionnaires distributed totaled 303: 14 in the pilot test and 280 in the final study. The instruments were self-administered, paper questionnaires that could be completed by hand within 15 to 20 minutes.

Participants were asked to return the survey regardless of their extent of participation, using a preaddressed envelope. Return postage was provided in many cases. The organization managers gave a telephone number in case any site responses needed to be clarified. A few

follow-up telephone calls were made to managers. Unused questionnaires were discarded by the coordinator at the site or returned to this researcher.

Incomplete returned questionnaires were not discarded. Individual questions were analyzed and each "N" number is reported. A total of 158 fully or partially completed volunteer questionnaires were returned. It was expected that most questions could be collectively analyzed to determine common themes and relationships. Normally, results from nonrandom sample samples cannot be generalized to other populations. Generalizability is discussed in the Chapter 5. Thirteen of 17 locations returned site data, however, because the questionnaire format provided inconsistent responses, the site results are not discussed in detail.

Heritage site respondents who provided incomplete or unclear responses could not be contacted because their identities were not known. Non-respondents volunteers could not be contacted. No follow-up mail-back survey instruments were administered.

The main purpose of extra mailing waves of follow-up is to increase the number of completed surveys, so there is reduced likelihood of nonresponse bias caused by not obtaining information from all units chosen from a sampling

frame (Crompton & Tian-Cole, 2001). The concern is that those units not completing the survey would respond differently from those who did return surveys (Crompton & Tian-Cole, 2001).

Crompton and Tian-Cole (2001) studied the extent of variation from three follow-ups done on each of 13 tourism surveys and concluded that older age-groups respond more promptly and may be over-represented in a follow-up mailing while follow-up for the below-25 cohort group may be under-represented. As it turned out, 77% of the sample was aged 50 or older. Crompton and Tian-Cole (2001) also found that for smaller samples of nonrespondents substantial incentives or alternative data collection modes such as telephone or personal interviews were more efficient and effective than additional mailing surveys.

#### Limitations of the Methods

The study methods are limited in that a mail instrument was used and supplemented with limited personal contact prior to or after mailing the instrument. Mail survey instruments generally result in low response rates. Dolsen and Machlis (1991) comment that response bias and low response rates may be serious limitations, though not equally important or always related. Self-reported methods of participation might suffer from a response error, that

is, the difference between actual and reported participation (Alexandris, Tsorbatzoudis, & Grouios, 2002). Further, the data were taken at a single moment in time; consequently they could not predict what could happen over time with respect to the observed relations (Losier, Bourque & Vallerand, 1993). Recollection of past activities may be difficult for some participants and may not reflect actual experiences. No analysis of nonresponses is also a limitation.

#### Conditions of Testing

The volunteers were instructed to answer questions for the heritage tourism site where they got the survey packet. Volunteers had to be age 18 or older.

#### Treatments

The subjects did not undergo any experimental treatments. The volunteers described themselves and their recent and past heritage site experiences so that their motivations, involvement, satisfactions, and benefits received could be evaluated.

#### Data Analysis and Techniques

The survey instrument questions were designed to simplify data coding and entry. Questions were grouped by type of question format and subject. Volunteers identified their specific heritage site. This researcher tracked the



number of survey packets sent to and returned from each heritage site. Data analysis focused on older adults aged 50 or older.

Qualitative open-ended survey responses were coded into categories from verbatim comments of respondents and then evaluated quantitatively. Descriptive statistics (mean, standard deviation and others) and frequency were run on all data. Principle component factor analysis was done on the 40 motivation statements. Internal consistency of scales (Cronbach alpha) was determined for groups of similar questions. The Statistical Package for the Social Sciences (SPSS) computer program was used to analyze the data. Data were also checked for outliers, to observe trends, and to assess assumptions of normality (Dennis & Zube, 1988).

## CHAPTER 4-RESULTS

### Objectives

This research investigated adult volunteers at heritage tourism sites in southwestern Pennsylvania and northern West Virginia to mainly identify their sociodemographic characteristics and motivations for volunteering. Other parameters included: (a) history of volunteering, (b) level of interest in heritage tourism, (c) level of satisfaction with the heritage organization's program for managing and retaining volunteers, (d) type of benefits received, (e) original reasons for volunteering, (f) level of commitment, (g) constraints and facilitators to volunteering, (h) social consequences; and (i) attachment to activity and place. The study emphasized populations aged 50 or older. The heritage tourism organizations also provided general background information.

The study specifically focused on developing a model to explain the factors that affect motivations of heritage tourism volunteers. The results were analyzed to identify the significance of characteristics, factors and any relationships. The study answered 12 research questions and other general questions which are repeated here.

### Research Questions

This descriptive research study included the following questions and other parameters.

Q1 What is the frequency of adult volunteering in general and in particular at heritage tourism sites? Do older adults volunteer more than other age groups?

Q2 What are the motivations of adult volunteers at heritage tourism sites?

Q3 What type of benefits do adult volunteers at heritage tourism sites experience - intrinsic or extrinsic?

Q4 What are the social and psychological benefits of adult volunteers at heritage tourism sites?

Q5 What is the level of place attachment for adult volunteers at heritage tourism sites?

Q6 What is the level of activity attachment for adult volunteers at heritage tourism sites?

Q7 What are the education levels of adult volunteers at heritage tourism sites? Are older volunteers at a higher education level than the average adult American?

Q8 What are the income levels of adult volunteers at heritage tourism sites? Are older volunteers in a higher income class than the average adult American?

Q9 What is the gender distribution of adult volunteers at heritage tourism sites? Do older women volunteer more than older men?

Q10 What is the history of volunteering of adults at heritage tourism sites? Do older volunteers have a history of volunteering for various causes and organizations throughout their lifespan?

Q11 What are the volunteering constraints or facilitators (e.g., managerial site conditions, physical mobility, transportation access, free time, personal health condition) that are important factors for involvement of adult volunteers at heritage tourism sites?

Q12 What is the level of satisfaction felt by adult volunteers at heritage tourism sites with the volunteer recruitment and retention methods?

The subjects were evaluated for these characteristics:

1. Demographics: age, race, sex, income level, educational level, major current or last occupation type, citizenship, state of origin of the subjects marital status, and perceived level of health.

2. Heritage tourism interest/specialization level in general and specific to the site;

3. Volunteer data: When it began - the age when the person first volunteered for any cause, the length of

service as a volunteer in general and as a volunteer at the site, frequency of participation how much time do volunteers invest, participation with family or friends, and length and duration of travel to the site;

4. Personal satisfaction level with the volunteering opportunity and the volunteer management practices; and

5. Type of benefits received. The types of volunteer benefits may include: volunteer compensation, educational opportunity, social contact, skills enhancement, improved self-concept or awareness, or improved psychological situation (e.g., less stress).

For general background information, the heritage tourism organization was asked:

1. Site information: type of site, number of visitors a year, number of full time employees, and operating seasons and days a year;

2. Volunteer information: number of paid and unpaid volunteers recruited a year; and

3. Volunteer procedures: e.g., recruitment, hiring, and firing performance evaluation, and reward.

### Site Data and Response Rates

Two sites were surveyed in the pilot test and 15 sites were surveyed in the final research. Ten other sites were contacted but declined to participate. Nine of the selected sites (53%) are in Pennsylvania and eight sites (47%) are in West Virginia. A list of sites and types are included in Table 1. The sites cover a variety of historic time periods and types of heritage tourism attractions: colonial, frontier, farm and industrial life, military forts and battlefields, and historic homes, towns and museums.

In the pilot test, 23 questionnaires were distributed and 14 were returned; this is a 61 percent response rate. In the research survey, 280 questionnaires were distributed and 144 were returned; this is a 51.4% response rate. Table 2 lists the site response rates. Individual site response rates range from 86.7 to 0.7 percent. The average response rate of the individual sites is 54.4%. The final questionnaire reflected minor formatting changes to the pilot survey therefore the results for both research parts were combined for analysis. The overall site response rate for the 158 combined surveys is 52.1%. The research goal was to receive a minimum of 150 returned questionnaires or at least a 65% response rate.

Table 1

*Heritage Site Descriptions*

Site Name	Heritage Focus	Annual Visitors
<i>Pennsylvania</i>		
<i>Rural</i>		
Meadowcroft Museum of Rural Life (P)	Native American archeology & 19 <sup>th</sup> century	15,000
Pennsylvania Trolley Museum (P)	Railroad trolleys 20 <sup>th</sup> century	-----
Bushy Run Battlefield (F)	French & Indian war / Pontiac's war	40,000
Historic Hanna's Town (F)	18 <sup>th</sup> century frontier	-----
Fort Roberdeau (F)	Revolutionary war, 18 <sup>th</sup> & 19 <sup>th</sup> century	2-5,000+
<i>Urban</i>		
Flatiron Building Museum / Heritage Center (F)	River / Industrial town museum	1,500
Historic Harmony (F)	Historic town	2,000+
Old Bedford Village (F)	18 <sup>th</sup> & 19 <sup>th</sup> century frontier town	-----
Senator Heinz Regional History Center (F)	Regional history museum	95,000
<i>West Virginia</i>		
<i>Rural</i>		
Burnsville Lake / Bulltown Historic Area (F)	Civil War / 19th century life	-----
Fort New Salem (F)	18 <sup>th</sup> century frontier	15,000
Jackson Mill (F)	Civil War era / Historic Jackson Homestead	30,000
Prickett's Fort (F)	Frontier fort	6,000+
Rich Mountain Battlefield (F)	Civil War site	-----
<i>Urban</i>		
Anne Jarvis House (F)	Mothers' Day / Historic house	5,600
Arthurdale Heritage, Inc. (F)	20 <sup>th</sup> century historic town	10-15,000
Blennerhassett Museum / Island / State Park (F)	Historic homestead / Local history	55,000

Note. Pilot (P) or Final (F) survey participant

The lower response rates may be due to a situation where all questionnaires could not be distributed as anticipated (e.g., Bushy Run and the FlatIron Building), some volunteers may not have been available during the research time period (e.g., Jackson Mill), and some managers may have changed their mind about participating or had other constraints.

The higher response rates may be due to hand delivery and pickup of questionnaires (e.g., at the two pilot sites and Heinz History Center), direct mail before a major event (e.g., Arthurdale and Historic Harmony) or providing return postage to encourage participation. No other site data will be discussed in this section.

### Research Questions and Results

The goal of the research was to explain the level of adult volunteer involvement at heritage tourism sites with a predictive model. This descriptive research study attempted to get general information and answer specific questions with special interest in volunteers aged 50 or older.

#### *Sociodemographic Profile of Respondents*

Five percent of the participants declined to give any demographic data.



Table 2

*Response Rates for Heritage Sites*

Site Name	Volunteer Population estimated	Surveys Sent	Surveys Returned	Percent N = 158	Site Response Rate, %
Old Bedford	15-30	15	13	8.2	86.7
Blennerhassett	165	15	13	8.2	86.7
Heinz History Ctr	112	21	18	11.4	85.7
Anne Jarvis House	6	6	5	3.2	83.3
Fort Roberdeau	30	11	8	5.1	72.7
Historic Harmony	105	25	18	11.4	72.0
Meadowcroft	14	8	5	3.2	62.5
Trolley Museum	---	15	9	5.7	60.0
Arthurdale	80	20	11	7.0	55.0
Fort New Salem	30	10	5	3.2	50.0
Prickett's Fort	30	30	15	9.5	50.0
Burnsville	---	15	7	4.4	46.7
Flatiron Museum	26	35 <sup>a</sup>	14	8.9	40.0
Bushy Run	25	30 <sup>b</sup>	10	6.3	33.3
Jackson Mill	20	12	3	1.9	25.0
Hanna's Town	---	20	3	1.9	15.0
Rich Mountain	---	15	1	0.6	0.7
Battlefield					
Overall	<sup>c</sup>	303	158	100.0	52.1

Note. <sup>a</sup> FlatIron requested more surveys than volunteers. <sup>b</sup>

Bushy Run expected to share questionnaires with Fort Pitt

Museum. <sup>c</sup> Some sites did not provide volunteer data.

*Geographic description.*

As previously stated, 53% of the sites are in Pennsylvania and 47% are in West Virginia. Ten sites are in rural settings and seven are in urban settings (See Table 1). Sixty-two percent of the respondents (N = 150) live in Pennsylvania and 37% live in West Virginia. One participant lives in Ohio (See Table 3).

*Demographic description.*

Research question 9 asks "*What is the gender distribution of adult volunteers at heritage tourism sites.*" Fifty-nine percent of the participants (N = 150) are women and 41% are males (See Table 3). Nationally, the ratio of women to men is 50.9 to 49.1 (U.S. Government, 2000a). In Pennsylvania and West Virginia, the ratio of women to men is 51.7 to 48.3 (U.S. Government, 2000b) and 51.4 to 48.6 (U.S. Government, 2000c), respectively. All further discussion of census data comes from the same reference sources.

Ninety-nine percent (N = 149) of the participants are native born citizens and 98% are White/Caucasian. Three participants are Native American Indians (See Table 3). Nationally, the white population is 77%, in Pennsylvania it is 86% and in West Virginia it is 96%.

Research question 9 also asks "*Do older women volunteer more than older men?*" In this sample, older women volunteer more than older men. Twenty-three percent of the participants (N = 150) fall in the 18-49 age range; 77% fall in the 50+ age group (See Table 3). The national percentage of Americans aged 50 or older is 27.3%, of which 15% are female and 12.3% are male.

Seventy-one females (61%) and 45 males (39%) aged 50 or older (N = 116) participated in the research (See Table 3). In Pennsylvania, 31.3% of the population is aged 50 or older of which 17.5% are females and 13.8% are males. In West Virginia, 32.6% of the population is aged 50 or older of which 17.9% are females and 14.7% are males.

*Family/social status.*

Sixty-seven percent of the participants (See Table 3, N = 150) are married and 13 percent are widowed. Eight percent once were married and 11 percent are single. Fifty-one percent of the participants (See Table 3, N = 149) live with one other person and 21% live alone. Nationally, 68% of the population lives in family households, 32.6% live with one other person, and 25.8% live alone.

Table 3

*Volunteer Demographics*

Question	Answers	Percent
Gender (N = 150)	Female	59.3
	Male	40.7
Age group (N = 150)	age 60-69	29.3
	age 50-59	24.7
	age 70-79	20.7
	age 40-49	12.0
	age 30-39	7.3
	age 18-30	3.3
	age 80+	2.7
Over age 50 (N = 116)	Female	61.2
	Male	38.8
Race (N = 149)	White/Caucasian	98.0
	Native American	2.0
Marital status (N = 150)	Married	66.7
	Widowed	12.7
	Never married	11.3
	Divorced	6.7
	Separated	1.3
	Living with another	1.3
State of residence (N = 150)	Pennsylvania	62.0
	West Virginia	37.3
	Ohio	.7

Table 3

*Volunteer Demographics (Continued)*

Question	Answers	Percent
Household includes how many persons including yourself (N = 149)	Two	54.4
	One	21.5
	Three	10.7
	Four	9.4
	Greater than four	4.0
Native-born U.S. Citizen (N = 150)	Yes	99.3
	No	.7
State of residence (N = 150)	Pennsylvania	62
	West Virginia	37.3
	Ohio	.7

Approximately 52% of the participants (See Table 4, N = 154) volunteer alone while 29% volunteer with a relative, who is typically a spouse or less frequently, an adult child age 18 or older. About 13 percent of the participants (See Table 4, N = 154) volunteer with a friend and 13 percent volunteer with two friends.

*Volunteer or work status.*

Fifty-seven percent of the participants (See Table 5, N = 148) are retired while 28 percent work part or full time. Eighty-nine percent (See Table 6, N = 146) receive no compensation for their volunteer work while seven percent receive minor compensation for expenses, such as

Table 4

*Social Influences*

Question	Answers	Percent
Relatives who volunteer with you at this site (N = 154)	None	52.6
	One	28.6
	Two	5.8
	Three	6.5
	More than three	6.5
Which one relative? (N = 127)	spouse	40.9
	none	37.8
	adult child age 18 or older	7.9
	child under 18	7.9
	parents	1.6
Friends who volunteer with you (N = 154)	none	51.3
	one	13.6
	two	13.0
	three	3.2
	more than three	18.8
Importance of social relationships you have made at the site (N = 153; mean = 2.08; SD = 1.197)	Very Important	38.6
	Important	35.9
	Neutral	10.5
	Somewhat Important	9.2
	Not Important	5.2
	Have not made any	.7

reimbursement for parking fees (in urban areas), meals and lodging, uniforms, mileage, university credit, or customer discounts at the onsite retail stores. Three percent work part-time at their heritage tourism site but also volunteer.

The participants reflect a variety of careers and interests. Twenty-six percent (See Table 5, N= 132) are or have worked as educators, nine percent worked in the financial industries, eight percent worked in science or engineering fields, eight percent worked in health care, almost seven percent worked in manufacturing or technical fields and five percent are homemakers. Other career choices include office staff, retail, military, government, communications, sales, clergy, and law enforcement.

*Socio-economic status.*

Research question 8 asks *"What are the income levels of adult volunteers at heritage tourism sites? Are older volunteers at a higher income level than the average adult American?"* Approximately one-third of the participants (35%) declined to identify an income range. Twenty-six percent of the participants (See Tables 5 and 7, N = 134) have a gross annual income of \$20,000 or less, 19% earn between \$21-40,000, 16% earn between \$41-60,000 and about 15% earn over \$61,000. This sample of participants

represents evenly distributed income levels. National, Pennsylvania and West Virginia household income levels are shown in Table 7. Persons with incomes over \$60,000 are under-represented in this study. About 14% of the participants who are aged 50 or older have annual incomes greater than \$60,000.

#### *Education level*

Research Question 7 asks "*What are the education levels of adult volunteers at heritage tourism sites?*" Forty-eight percent of all participants (See Table 5, N = 150) have received a college education or an advanced degree and 29% have attended some college. One percent of the participants are currently college students. Twenty-three percent have achieved up to a high-school education. Nationally, 51% of Americans aged 18 or older have some college education up to full doctorates compared to 45% Pennsylvanians and 31% West Virginians.

Research Question 7 also asks "*Are older volunteers at a higher education level than the average person in Pennsylvania or West Virginia?*" In this sample, 47% of the participants age 50 or older (Table 5, N = 116) have received some college education up to advanced degrees. National, Pennsylvania and West Virginia percentages for adults age 45 or older who have some college education up



to doctorates are 21.7%, 18% and 16%, respectively. These participants are more educated than the national and state populations.

Table 5

*Volunteer Socio-Demographics*

Question	Answers	Percent
Education level (N = 150)	One to two year post high school	28.7
	Four year college	25.3
	Advanced degrees	22.7
	Grades 10-12	22.7
	Grades 7-9	.7
Over age 50 education (N = 116)	Advanced degrees	26
	Four year college	21
2002 annual gross income before taxes (N = 134)	Decline to answer	23.1
	\$21-40,000	19.4
	\$41-60,000	16.4
	Less than \$10,000	15.7
	\$10-20,000	10.4
	\$61-80,000	9.0
	Over \$100,000	3.7
	\$81-100,000	2.2
Over age 50 income (N = 116)	\$60,000 or more	13.8
	\$21-40,000	19.8
	\$41-60,000	15.5
	\$61-80,000	9.5
	\$20,000 or less	15.5

Table 5

*Volunteer Socio-Demographics (Continued)*

Question	Answers	Percent
Occupation	Retired	56.8
(N = 148)	Employed full-time	15.5
	Employed part-time	12.8
	Voluntarily unemployed	6.1
	Disabled	4.7
	Involuntarily unemployed	2.0
	College student	1.4
	Decline to answer	.7
Occupation category or career focus. Categorized.	Education	25.8
(N = 132)	Financial	9.1
	Science or engineering, Health care, Miscellaneous other	8.3 each
	Manufacturing or technical worker	6.8 each
	Homemaker	5.3
	Office staff	4.5
	Military or government, Student	3.8 each
	Artist or writer, Retail	3.0 each
	Sales or Management	2.3 each
	Construction	1.5

Table 6

*Volunteer Compensation*

Question	Answers	Percent
Volunteer compensation (N = 146)	No wage	89.0
	Expenses only	7.5
	Part-time wage	3.4
Other compensation (N = 24)	Parking fees	6.3
	Meals & lodging	1.9
	Mileage	1.3
	Uniforms	1.3

Table 7

*Income Data*

Income Range Percent	Sample	Sample aged 50 +	National	Pennsylvania	West Virginia
up to \$20,000	26.1	15.5	22.1	23.5	34.3
\$21-40,000	19.4	19.8	25.3	26.3	29.3
\$40-60,000	16.4	15.5	19.6	20	17.6
over \$60,000	14.9	13.8	33	30.2	18.8

*Perceived level of health.*

Over 63% of the participants (Table 8, N=149, mean = 2.44; SD = 1.342) responded that health is Very Important or Important to whether they volunteer; 12% said it is

Somewhat Important. About 88% of the participants (Table 8, N= 156) said that their health is Excellent or Good.

*Volunteering Characteristics*

Table 8

*Volunteer Longevity of Residence near Site*

Question	Answers	Percent
Live in the general area (N = 141)	Yes	88.7
	No	11.3
How long have you lived in this area (N = 141)	My Whole Life	37.6
	20-40 years	33.3
	10-20 years	11.3
	5-10 years	7.8
	1-5 years	6.4
	Less than a year	3.5
How long do you plan to stay (N = 149)	Indefinitely	87.2
	5-10 years	6.0
	1-5 years	4.7
	Less than a year	2.0
Importance of health (N = 149; mean = 2.44; SD = 1.342)	Important	34.9
	Very Important	28.9
	Neutral	12.1
	Somewhat Important	12.1
	Not Important	12.1
Overall level of physical health (N = 156)	Good	49.4
	Excellent	38.5
	Fair	11.5
	Poor	.6

### *History of Volunteering*

Research question 10 asks *"What is the history of volunteering of adults at heritage tourism sites?"* The mean age that participants first began to volunteer for any cause is about 32 but ranges from age four to 77 (See Table 9, N=150). About 65% of the participants (See Table 9, N=154) have been a volunteer for 11 or more years; of those, 37% of the participants have volunteered more than 30 years. About 6 percent of the participants started volunteering within the last year.

Research question 10 also asks *"Do older volunteers have a history of volunteering for various causes and organizations throughout their lifespan?"* Combine this with research question 1 which asks *"Do older adults volunteer more than other age groups?"* Seventy-one percent of the participants age 50 or older (See Table 9, N = 114) have been a volunteer for 11 or more years; of those 45% have volunteered for more than 30 years.

About 71% of all participants (Table 10, N= 154) volunteer for at least one other cause in their geographic region. Many participants volunteer at two or more community activities. About 53% of the participants (N = 108) volunteer at their religious place of worship, and 12% volunteer at schools.

Table 9

*Volunteer History*

Question	Answers	Value
Age when first began to volunteer for any cause (N = 150)	Mean	32
	Minimum	4
	Maximum	77
		Percent
How many years actively volunteered for any cause? (N = 154)	greater than 30 years	37
	5-10 years	20.1
	11-20 years	14.3
	21-30 years	13.6
	2-4 years	9.1
	Began within the last year	4.5
	1 year	1.3
Volunteer years for participants over 50 (N = 114)	greater than 30 years	45.6
	21-30 years	14.0
	11-20 years	12.3
	7-10 years	17.5
	2-4 years	5.3
	1 year or less	5.3

Table 9

*Volunteer History (Continued)*

Question	Answers	Percent
Volunteer history at this site (N = 155)	5-10 years	27.7
	2-4 years	23.9
	11-20 years	21.9
	more than 30 years	4.5
	I just began to volunteer within the last year	15.5
	1 year	3.9
	21-30 years	2.6
Future plans regarding volunteering at this site (N= 157)	Volunteer the same	70.7
	Volunteer more	17.2
	Don't know	9.6
	Reduce level of volunteering	1.9
	Stop volunteering	.6

Other volunteer interests include libraries, hospitals, elder care facilities, community sports programs, non-profit programs that help the needy (e.g., Salvation Army, Meals-on -Wheels, housing, or health clinics), community arts (e.g., local theatre, living history, or museums) or organizations like the Boy Scouts or Rotary.

Table 10

*Other Volunteer Activity*

Question	Answers	Percent
Volunteer for other heritage sites in this region (N = 155)	No	81.3
	Yes	18.7
If yes, how many (N = 24)	One site	37.5
	Two sites	29.2
Volunteer for other causes (N = 154)	Yes	71.4
	No	28.6
		Count
If yes, what type of volunteer activity. (multiple answers allowed) (N = 177)	Church/Synagogue	58
	Hospital	7
	School/ After-school programs	22
	Other community activities	65
	Library	7
	Elder care	8

*Commitment to Heritage Volunteering.*

Research question 1 asks “*What is the frequency of adult volunteering in general and in particular at heritage tourism sites?*”

About 67% agree Quite a bit (2) or Very much (1) that they volunteer on a regular basis (See Table 11, N= 147, mean = 2.01; SD = 1.027). About 71% agree Quite a bit or Very much that volunteering is a high priority for them (N



= 145, mean = 1.95; SD = .953). The strength of commitment (Ryan et al, 2001) was assessed by combining the 5-point Likert scale ratings of these two items (See Table 11, N = 142, mean = 1.9824, Chronbach alpha of .78). Three new scales were assigned, High, Medium and Low commitment. The results are 44%, 48% and 8%, respectively.

At their heritage site, 22% of the participants (See Table 9, N = 155) have volunteered for 11-20 years, 28% have volunteered for 5-10 years and 24% have volunteered for 2-4 years. About 19% started volunteering at their site within the last year. Seven percent have volunteered more than 20 years.

An overwhelming 88% of the participants (See Table 9, N = 157) said that they will volunteer the same or more at their heritage site. About 19% also volunteer at other heritage tourism sites in their area (See Table 10, N = 155); a few volunteer at more than two sites.

For all volunteering efforts, 41% of these participants volunteer up to 4 hours each week; thirty-four percent volunteer 5 to 9 hours per week (See Table 12, N = 152). When their heritage site is open, about 30% of the participants volunteer one day each week and 25% volunteer several days each week (N = 142). About half of the participants spend 4 hours or less onsite and half spend up

to 8 hours (N = 156). Flexible work schedules appear to be necessary to attract and keep volunteers.

Table 11

*Perception of Volunteer Activity*

Question (N, mean, SD)	Answers	Percent
Volunteer on a regular basis (147; 2.01; 1.027)	Very Much	40.8
	Moderately	26.5
	Quite a Bit	25.9
	A Little Bit	4.8
	Not Very	2.0
Volunteer depending on time (139; 2.40; 1.172)	Quite a Bit	30.9
	Moderately	27.3
	Very Much	25.9
	A Little Bit	8.6
	Not Very	7.2
Volunteer depending on activity (137; 2.41; 1.240)	Quite a Bit	36.5
	Very Much	25.5
	Moderately	19.7
	Not Very	10.2
	A little Bit	8.0
Volunteering is a high priority for me (145; 1.95; .953)	Very Much	40.7
	Quite a Bit	30.3
	Moderately	22.1
	A Little Bit	6.9
Commitment: combination (142; 1.64; .623)	High	44
	Medium	48
	Low	8

Table 12

*Volunteer Frequency*

Question	Answers	Percent
Total hours each week (on average) do you volunteer for all causes (N = 152)	1-4 Hours	32.9
	5-9 Hours	34.2
	Less than 1 Hour	9.2
	10-14 Hours	8.6
	15-19 Hours	7.9
	20 or more Hours	7.2
How often you volunteer at this site (N = 142)	One day/week	29.6
	Several days/week	25.4
	Several days/month	21.8
	Several days/year	12.0
	One day/month	9.2
	One day/year	2.1
Time spent on each visit to this site (N = 156)	4-8 hours/day	51.9
	Less than 4 hours/day	48.1
Future plans (N = 157)	Volunteer the same	70.7
	Volunteer more	17.2
	Don't know	9.6
	Reduce level	1.9
	Stop	.6

Eighty-nine percent of the participants live near their heritage site (See Table 13, N = 141) and 78% are within 30 minutes driving distance (N = 156). Sixty-eight percent are within 20 miles of the site (N = 156) and 14%

drive 21 to 50 miles. Six participants are very committed to their sites: Two volunteers drive 60 to 100 miles while four drive 100 to 150 miles. Eighty-two percent have lived in the general area for 10 or more years (See Table 8, N = 141). Eighty percent plan to stay in the area (N = 149).

Table 13

*Volunteer Proximity to Site*

Question	Answers	Percent
Importance of transportation to whether you volunteer? (N = 147; mean = 3.44; SD = 1.733)	Not Important	49.0
	Very Important	26.5
	Neutral	8.8
	Important	8.2
	Somewhat Important	7.5
Importance of travel time (N = 146; mean = 3.66; SD = 1.497)	Not Important	43.8
	Somewhat Important	19.2
	Very Important	15.1
	Important	11.0
	Neutral	11.0
Travel time from your residence to the site (N = 156)	Less than 0.5 hour	78.2
	1 hour	17.3
	More than 2 hours	2.6
	1-2 hours	1.9
Travel distance from your home to the site (N = 156)	1-5 miles	40.1
	6-20 miles	27.6
	Under 0.5 mile	14.1
	21-50 miles	13.5
	Other	3.8
	Adjacent	.6

### *Place Attachment*

Research question 5 asks "*What is the level of place attachment for adult volunteers at heritage tourism sites?*"

Three 5-point Likert survey questions relate to the site itself: the overall site itself, the site historic structures and the site landscape and natural resources. (See Table 14). The participants rated these 53%, 55% and 28% Very Important, respectively. Results from these questions were combined and recoded into High (49.7%), Medium (39%) and Low (11%) level of place attachment or sense of place (See Table 15,  $N = 145$ , mean 1.61,  $SD = .679$ , Chronbach  $\alpha = .7558$ ). Eighty-eight percent of the participants ( $N = 146$ ) said that their heritage area has become one of their favorite places and would miss it if they moved.

### *Heritage Tourism Interest/Specialization Level.*

On a 5-point Likert scale, with Very Great Improvement = 1, Great Improvement = 2 and No Change = 5, participants responded how their interest level or knowledge level in history, culture, or heritage topics has changed since they first began to volunteer at their heritage tourism site (See Table 16).

Table 14

*Place Attachment and Decision to Volunteer*

Question	Percent				
(N, mean, SD)	VI	I	N	SI	NI
The overall site itself (150; 1.81; 1.189)	52.7	28.7	4.7	4.7	7.3
The site historic structures (148; 1.89; 1.275)	55.4	23.6	6.8	5.4	8.8%
The site landscape and natural resources (148; 2.48; 1.412)	28.4	35.8	12.8	5.4	17.6

Note. Code: VI = very important, I = important, N = Neutral, SI = Somewhat important; NI = Not Important

Table 15

*Place Attachment - Combined Results*

Question	Percent		
	High	Medium	Low
Combined (N = 145; mean = 1.61; SD = .679; Chronbach $\alpha$ = .7558)	49.7	39.3	11.0

About 10 percent said that they had no change in their general interest level, while 64% said they have seen Great or Very great improvement ( $N = 134$ , mean = 2.32; SD = 1.290). About seven percent said that they have had no change in interest in local issues in particular, while 74% have seen Great or Very great improvement ( $N = 133$ , mean = 2.08; SD = 1.142).

Nine percent have not seen an increase in their level of participation in learning about these topics in general, while 63% have seen Great or Very great improvement. ( $N = 134$ , mean = 2.36; SD = 1.198). Five percent have not seen a change in their level of participation in learning about these topics in particular, while 61% have seen Great or Very great improvement. ( $N = 135$ , mean = 2.36; SD = 1.129).

Four percent have not seen an increase in their level of understanding of these topics at their heritage tourism site, while 81% have seen Great or Very great improvement ( $N = 134$ , mean = 1.94; SD = 1.002).

These five questions were highly inter-correlated (Pearson correlation, two-tailed: .632 to .890); Chronbach alpha ( $N = 125$ ) is .88 (See Table 17).

*Activity Attachment.*

Research question 6 asks "*What is the level of activity attachment for adult volunteers at heritage*

*tourism sites*” Sixty-two percent of the participants (See Table 11, N = 137, mean = 2.41; SD = 1.240) agree Quite a bit or Very much that they volunteer depending on the activity.

Table 16

*Volunteer Interest in Heritage Topics*  
(Now compared to when they first started)

Question	Percent				
Percent of Improvement (N, mean, SD)	VG	G	M	S	NC
Interest level in general. (134; 2.32; 1.290)	32.8	31.3	16.4	9.7	9.7
Interest level in local topics in particular. (133; 2.08; 1.142)	36.1	37.6	15.0	4.5	6.8
Participation level in learning opportunities in general. (134; 2.36; 1.198)	26.1	36.6	21.6	6.7	9.0
Participation level in learning opportunities about local topics in particular. (135; 2.36; 1.129)	25.2	35.6	23.0	11.1	5.2
Understanding level of this site. (134; 1.94; 1.002)	37.3	43.3	11.2	4.5	3.7

Note. Code: VG = very great; G = great; M = medium; S = some; NC = no change



Table 17

*Heritage Interest - Pearson Correlations*

Questions	Correlation		Factor		
Chronbach Alpha = .88	28a.	28b.	28c.	28d.	28e.
28a. My level of interest in general.	1				
N	134	132	133	134	133
28b. My level of interest in local topics in particular.	.832	1			
N	132	133	133	133	132
28c. My level of participation in learning opportunities in general.	.738	.643	1		
N	133	133	134	134	133
28d. My level of participation in learning opportunities about local topics in particular.	.668	.663	.890	1	
N	134	133	134	135	134
28e. My level of understanding of this site.	.632	.687	.698	.774	1
N	133	132	133	134	134

Note. All correlations are significant at the 0.01 level (2-tailed).

About 45% of the participants have duties that relate to telling the site history. Participants could identify multiple duties so all responses were combined (See Table 18, N = 261). Twenty-six percent of the participants are

tour guides and 19% do site interpretation or demonstrations. Over eight percent have management responsibilities. Other duties include research, library and exhibit maintenance (15%), clerical/shipping (9%), landscaping maintenance (9%), visitor center desk (8%), and building maintenance (5%).

Table 18

*Volunteer Duties (Multiple answers allowed)*

Duty	Count	Percent
Tour guide	69	26.4
Site interpretation/demonstrator	49	18.8
Office/Shipping clerical work	24	9.2
Landscaping maintenance	23	8.8
Visitor Center desk	22	8.4
Management responsibilities	21	8.1
Research	17	6.5
Exhibit/Collections management	15	5.7
Structure/Building maintenance	13	5.0
Library maintenance/cataloging	7	2.7
Natural resource management	1	.4
Total	261	100.0

Other unique volunteer duties include Board member, gift shop clerk, food service helpers, fundraisers, event organizers, community relations staff, and trolley operators. These diverse duties at heritage sites indicate volunteers have a variety of talents and interests.

*Original Interest from Volunteer*

A majority of participants (45%, See Table 19) first learned about volunteering at their heritage tourism site by word of mouth (friend, family member or acquaintance). Fourteen percent learned about volunteering from a previous visit to the site, eight percent learned from their local newspaper and 11% learned from the site membership organization. Fewer participants learned about volunteering activities from the site brochure (3.6%), volunteer organization at the site (4.2%) and just driving past the site (4.2%). Six participants (see Table 20) said that they were directly asked by someone at the site to be a volunteer or Board member.

Table 19

*Marketing Methods**How did you learn about volunteering at this site?*

Method <i>(Multiple answers allowed)</i>	Count	Percent
Word of mouth (friend, family, acquaintance)	85	44.5
Previous visit	27	14.1
Membership Organization at Site	21	11.0
Other	20	10.5
Newspaper	15	7.9
Volunteer organization at site	8	4.2
Driving Past	8	4.2
Site brochure	7	3.6
Total	191	100.0

Table 20

*Other source of information*

Method <i>(Multiple answers allowed)</i>	Count	Percent
Called or asked by someone at the site director	6	27.3
An educational organization	4	18.2
Other organization, e.g., United Way	3	13.6
Special event or occasion, e.g. Bicentennial	2	9.1
Local Television News	1	4.5
Other	6	27.3
Total	22	100.0

Participants described why they originally volunteered at the site. Ninety-two percent of the participants (N = 145) responded to the open-ended question. This question may have got a high response rate because it was the first open-ended question and is in the middle of the questionnaire. Responses are grouped into four categories: self (33.9%), altruistic (33.0%), social (18.6%), and site (14.5%). Table 21 lists the counts and frequencies for each category and subcategory.

Table 21

*Original Reasons for Volunteering (at this Heritage Site)*

Category	Subcategory	Count	Percent
self	history	42	19.0
	keep active	10	4.5
	nostalgia	6	2.7
	education	5	2.3
	job	4	1.8
	learning	4	1.8
	personal enjoyment	3	1.4
	personal pride	1	0.5
	<i>Subtotal</i>	75	33.9

Table 21 (Continued)

*Original Reasons for Volunteering (at this Heritage Site)*

Category	Subcategory	Count	Percent
altruistic	help out	50	22.6
	generations	12	5.4
	community pride	5	2.3
	management	4	1.8
	give back	2	0.9
	<i>Subtotal</i>	73	33.0
social	family	13	5.9
	friends	21	9.5
	new contacts	7	3.2
	<i>Subtotal</i>	41	18.6
site	community pride	15	6.8
	history	15	6.8
	management	1	0.5
	other	1	0.5
	<i>Subtotal</i>	32	14.5
<i>Total</i>		221	100.0

Note. No data or no response = 13/158 = 8.2 percent.

Examples of direct quotes pertaining to each subcategory for the original reasons for volunteering are provided.

1. Self (33.9%)

a. History: "I enjoy reliving and demonstrating history." "History is my passion." "Strong love of history and a desire to learn more, particularly about local history." "I thought if I was going to live in an historic town, I should know about it." "I was new to the area and felt that I could learn about the history of the area by volunteering." "I wish to relearn and relive this lifestyle." "Retired history teacher, interested in history."

b. Keep active: "I needed a complete change in my life." "I had just retired as a school teacher and wanted to continue using my skills." "Need to do something productive with my time since I did not work any longer." "After retirement I finally had a little time to volunteer."

c. Nostalgia: "The site has always been a part of my life since I was a Girl Scout in WWII." "Youthful remembrances of and enjoyment with subject."

d. Education: "I was seeking a summer internship that would allow me to acquire hands-on training in

historical interpretation." "I'm a student interested in going to graduate school on folklore."

e. Job: "To fulfill the requirement of volunteer hours as a verified master gardener in West Virginia." "To gain experience for a job at a state site."

f. Learning: "I'm learning something new every time I spend time at the museum." "Had a desire to learn more about community and its origins." "It is very educating."

g. Personal enjoyment: "It was fun." "I enjoy the people."

h. Personal pride: "Felt it was a compliment to be asked to join the Foundation Board."

## 2. Altruistic (33%)

a. Help out: "I was looking for places to help." "I was asked by the volunteer coordinator." "Because the need was there." "Very sad by deterioration - wanted to do something about this."

b. Generations: "Family is direct descendants of heritage community." "This island identifies my heritage." "For the ability to teach school children about western PA history."

c. Community pride: "To make a difference to the community." "Desire to improve the community and protect



its heritage specially endangered National Historic Landmark Structures."

d. Management: "Was asked to help with finances." "They needed a new treasurer after my father resigned."

e. Give back: "My years of 4-H experiences and camping at Jackson's Mill and my love of history have led to my dedication." "My son's first job was helping building this village. Helped him get through college with his paycheck."

### 3. Social (18.6%)

a. Family: "My daughters both belonged and my son in-law." "My wife was a volunteer long before I could attend. We do this now together." "My husband was always here and I volunteered in order to see more of him." "Enjoy the "father-son" aspect."

b. Friends: "A personal friend requested help." "I became involved with this site at the request of friends who are very dedicated to preserving the site." "We live in a small community and this is the center where the residents meet for activities." "After I retired, a friend who volunteered here suggested I volunteer."

c. New contacts: "To meet new people." "I enjoy meeting with visitors." "It gave me an opportunity to meet with people."

4. Site (14.5%)

a. Community pride: "It is one of the finest sites I have been to. The staffs' work is outstanding, and I wanted to be part of it." "I live close to the area and interested in seeing the area develop more for tourism." "Keep my hands on my own home town." "Met and was impressed at what site director was doing with the site!"

b. History: "To help promote the preservation and interpretation at this nationally significant historic site." "I was interested in the history of the site." "It was when they really began to try to restore the buildings." "I read of forming a Historical Group and was interested so was in on its beginning."

c. Management: "Helped design the first fund-raising slide program."

*Constraints or Facilitators to Volunteering*

Research question 11 asks "What are the volunteering constraints or facilitators (e.g., managerial site conditions, physical mobility, transportation access, free time, personal health condition) that are important factors for involvement of adult volunteers at heritage tourism sites?"

### *Facilitators*

Participants described anything that helped or encouraged them to originally decide to volunteer at the site. Sixty-three percent of the participants (N = 99) responded to the open-ended question. Responses are grouped into the same four categories: site (28.5%), social (27.7%), altruistic (23.4%) and self (20.4%). Each category has several subcategories. Table 22 lists the counts and frequencies for each category and subcategory.

Table 22

*Facilitators (Anything that helped or encouraged participant to originally volunteer at this heritage site)*

<u>Category</u>	<u>Subcategory</u>	<u>Count</u>	<u>Percent</u>
site	management	31	22.6
	history	8	5.8
	<i>Subtotal</i>	39	28.5
social	friends	31	22.6
	family	6	4.4
	community pride	1	0.7
	<i>Subtotal</i>	38	27.7

Table 22 (Continued)

*Facilitators (Anything that helped or encouraged participant to originally volunteer at this heritage site)*

Category	Subcategory	Count	Percent
altruistic	help out	16	11.7
	generations	7	5.1
	community pride	4	2.9
	give back	3	2.2
	history	1	0.7
	preservation	1	0.7
	<i>Subtotal</i>	32	23.4
self	keep active	8	5.8
	history	4	2.9
	family	3	2.2
	learning	4	2.9
	personal enjoyment	4	2.9
	medical	2	1.5
self	job	1	0.7
	education	1	0.7
	nostalgia	1	0.7
	<i>Subtotal</i>	28	20.4
Total		137	100.0

Note. No data or no response = 59/158 or 37.3 percent.

Examples of direct quotes pertaining to each subcategory for facilitators for volunteering are provided.

1. Site (28.5%)

a. Management: "The dedication and atmosphere of the site and its staff." "Enthusiastic recruiters." "Training by knowledgeable persons." "The education coordinator called me personally to encourage my participation." "After attending a lecture there, I was extremely impressed with the dedicated personnel and staff I came in contact with." "Saw the enthusiasm of people already involved."

b. History: "Want to see community heritage preserved." "It was connected to the Civil War."

2. Social (27.7%)

a. Friends: "A fellow teacher works here now." "Friend told me about the site." "Friends were involved and asked me to help." "This helped me to realize that there are still wonderful people in this world and everything is not about money." "Get to know my neighbors." "My friends who volunteered were enthusiastic."

b. Family: "My husband's interest in history." "My family was part of the building of the fort."

c. Community pride: "The dreams and optimism of one person ignited the community into action."

### 3. Altruistic (23.4%)

a. Help out: "Need by organization due to budget cuts." "Sense of being needed and also being able to help." "Made me feel needed." "There was so much to do." "To fulfill some critical needs for this museum."

b. Generations: "Interested in passing something on." "Help volunteer for the future generations."

c. Community pride: "Do my part for the old home town." "As a homeowner, wanted to take pride in community."

d. Give back: "Actually the site is what drew us to the community. Coming to volunteer then is sort of a "thank you" for drawing us to this place." "To help pay back, for giving my son a job when he needed it." "People have come through for me in my projects so I am in essence returning the favors."

e. History: "I had joined the Westmoreland County Historical Society."

f. Preservation: "Saw a need to stop destruction of important historic structures."

### 4. Self (20.4%)

a. Keep active: "Semi-retired so had some time." "Need to participate after my semi-retirement." "I knew guiding would give me a project to do when I retired from teaching."

b. History: "Wanting to learn about heritage arts and crafts." "To learn more history of the Victorian era." "Interest in history, costuming (historically accurate)."

c. Family: "My family history is here." "Family history was basis for (volunteering) in the beginning."

d. Learning: "My interest in herbs and their uses in the past." "The staff was eager to help you learn."

e. Personal enjoyment: "My interests in preserving." "They had a historic loom that I worked on repairing."

f. Medical: "I got involved in volunteer work because of my disability."

g. Job: "Might lead to post-retirement job."

h. Education: "By volunteering, I fulfill my intern requirement."

i. Nostalgia: "When I was a young kid, I was amazed by this place." "My decision partly stemmed from my feeling as a youth."

#### *Constraints*

Participants described anything that hindered or discouraged them from originally deciding to volunteer. A minority, 39% of the participants (N = 62) answered this open-ended question. Responses are grouped into three categories: self (50.8%), site (34.9%) and social (14.3%).

Each category has several subcategories. Table 23 lists the counts and frequencies for each category and subcategory.

Table 23

*Constraints (Anything that hindered or discouraged participant to originally volunteer at this heritage site)*

Category	Subcategory	Count	Percent
self	lack of time	20	31.7
	medical	4	6.3
	lack of transportation	3	4.8
	lack of money	2	3.2
	not interested	2	3.2
	lack of self-esteem	1	1.6
	Subtotal	32	50.8
site	poor management	8	12.7
	location not nearby	7	11.1
	no contact	2	3.2
	lack of information	1	1.6
	lack of money	1	1.6
	no one asked	1	1.6
	too much fundraising	1	1.6
	workload	1	1.6
	Subtotal	22	34.9



Table 23 (Continued)

*Constraints (Anything that hindered or discouraged participant to originally volunteer at this heritage site)*

Category	Subcategory	Count	Percent
social	family discouragement	3	4.8
	family medical issues	2	3.2
	unfriendly	2	3.2
	family issues	1	1.6
	pressured	1	1.6
	Subtotal	9	14.3
Total		63	100.0

Examples are provided of direct quotes pertaining to each subcategory for constraints for volunteering.

1. Self (50.8%)

a. Lack of time: "Lack of time (when) working, now retired." "Lack of time, family demands." "Just too busy working, raising a family. Had to wait until I retired." "Finding time to volunteer with my children."

b. Medical: "Personal health."

c. Lack of transportation: "Inadequate transportation."

d. Lack of money: "I am a college student, so lack of money is a large factor."

e. Not interested: "Never thought of it." "Never was interested."

f. Lack of self-esteem.

2. Site (34.9%)

a. Poor management: "Manager has great ideas; Hard to get her to follow through on her promises."

"Organization had a leader for a time that had poor people skills and little experience or knowledge of organization and community needs." "Original site managers were not overly excited about having to deal with volunteers." "Poor management and coordination of volunteers initially had me discouraged and considering no longer volunteering. With new management, the situation is much improved." "Site manager is too occupied with other historic sites to do her job properly."

b. Location not nearby: "Didn't live in area." "I started volunteering where we moved to the area." "It is not easy to take public train system to site. It is a long walk from transit stop."

c. No contact: "Finding a contact person." "Didn't know many of the people."

d. Lack of information: "Lack of knowledge about the area."

- e. Lack of money: "Lack of money to complete projects, red tape (grants)."
- f. No one asked: "Not asking."
- g. Too much fundraising.
- h. Workload: "The only hindrance was the huge scope of the project and knowing anyone who made the commitment was into a long range project."

3. Social (14.3%)

- a. Family discouragement: "By living with someone who did not like to volunteer, can hold you back." "My family feels I would spend my time better than spending so much of my energy and time volunteering."
- b. Family medical issues: "I was a care giver for my spouse and lack of time." "I had some concern for my mother who I care for because of her restrictions and ill health due to arthritis."
- c. Unfriendly: "Other sites do not welcome volunteers or unpaid staff." "About 25 years ago my family attended a picnic at the museum and no one said "welcome" or "hello"."
- d. Family issues: "Family demands."
- e. Pressured: "Concern about getting pressure to do more than I could."

Four other questions also focused on constraints. A minority, 35% (See Table 13,  $N = 147$ , mean = 3.44;  $SD = 1.733$ ), responded that available transportation is Important or very Important to whether they volunteer. Twenty-six percent responded that travel time is an Important or Very Important consideration for how often they volunteer (See Table 13,  $N = 146$ ; mean = 3.66;  $SD = 1.497$ ). A slight majority, 57% of the participants, agree Quite a bit or Very much that they volunteer depending on time (See Table 11,  $N = 139$ ; mean = 2.40;  $SD = 1.172$ ). Health issues were discussed previously.

#### *Volunteer Motivations*

Research question 2 asks "*What are the motivations of adult volunteers at heritage tourism sites?*" Forty motivation-related questions that used a 5-point Likert answer scale, with 1= Strongly Agree, 2 = Agree, 3 = Neutral, 4 = Disagree and 5 = Strongly Disagree, were assessed. The statistical data for all 40 questions are listed in Table 24. Eighteen of the 40 statements (45%) received a mean rating between one and two. None received a mean rating of one or below three. All except two statements had standard deviations of one or less. Generally, as the mean value increased, the standard deviation value increased. The data is skewed positive.

Statements of high importance had means from 1.5 to 2.0. Most participants agreed with the statement that falls under the theme "altruistic-help out": "I feel it is important to help others" (mean = 1.51). The next statement most participants agreed with falls under the theme "altruistic-generations": "I am doing something for future generations" (mean = 1.57). In the moderate importance category (mean value 2.0 or greater), the first two equally rated statements fall under "site-preservation": "Discouraged about loss or destruction of heritage sites even those that are far away" (mean = 2.03) and "social-new contacts": "Volunteering is a way to make new friends/increases my social contacts" (mean = 2.03).

To examine central tendency, establish themes and reduce the data, principal component factor analysis with varimax rotation (25 rotations) was run on the 40 questions in SPSS, a statistical computer software. Adequate sample size for principal component analysis (PCA) can be determined by three specific rules (McGarigal, Cushman and Stafford, 2000): (1)  $N = 20 + 3P$ , where  $P$  = number of variables (in this case, 40); (2)  $N = 4P$  and (3)  $N = 10P$ . Also, at a minimum, a 3:1 ratio of samples to variables should be maintained. The calculations are 140, 160 and 400, respectively. The lowest number of responses ( $N$ ) in

these 40 questions is 143, which is above the minimum number of observations needed to run a meaningful PCA. The minimum ratio is 3.6:1 and is more than adequate.

The following criteria was used for scale construction: Eigenvalues greater than 1.0; rotated factor loading greater than 0.45; and exclusion of items with loadings greater than 0.45 on two or more factors unless the loadings were separated by at least 0.20. In addition, factors needed to have an internal Chronbach reliability  $\alpha$  alpha coefficient of at least 0.70. Ryan et al. (2001) used these same criteria except their alpha cutoff was 0.75. Ryan et al. (2001) also used the SPSS factoring option of "pairwise deletion of missing values". Using the option of pairwise deletion, the rotation worked for all 40 questions.

Ten Eigenvalues over 1 and ten component categories initially resulted. Using the criteria for scale construction, the analysis produced five final component categories consisting of 27 items. The 27 items were factored again using varimax rotation and pairwise deletion of missing values. Refactoring rearranged the rankings of a few items from the first pairwise factor analysis but the numbers in each component stayed the same. Component 1 has 10 items; components 2 and 3 each have five items;

component 4 has four items; and component 5 has three items. The factor results are summarized in Tables 25 and 26. The five themes are similar to groupings for volunteer original reasons, facilitators and constraints: Component 1 altruistic, Component 2 self-improvement, Component 3 site-related, Component 4 social issues and Component 5 self-interest.

#### *Volunteer Benefits*

Research question 3 asks "*What type of benefits do adult volunteers at heritage tourism sites experience - intrinsic or extrinsic?*" The types of volunteer benefits may include: volunteer compensation, educational opportunity, social contact, skills enhancement, improved self-concept or awareness, or improved psychological situation (e.g., less stress).

Some benefits were highlighted in the responses for the facilitator, constraint and motivation questions. Extrinsic benefits would fall under the social, self and site interests while intrinsic benefits would fall under altruistic interests.

Table 24  
*Motivation Statistics -*  
*40 Questions<sup>1</sup>*

Question	N	Mean	SD
I feel it is important to help others.	146	1.51	0.578
I am doing something for future generations.	152	1.57	0.605
This heritage area has become one of my favorite places / Would miss my heritage site if I moved.	150	1.63	0.710
Volunteering lets me learn things through direct, hands on experience / Get to learn new things.	146	1.68	0.674
Have fun.	150	1.69	0.579
Improves my community / I feel a civic responsibility / Pride.	149	1.71	0.596
I am genuinely concerned about the particular group I am serving.	145	1.77	0.695
I can do something for a cause that is important to me.	152	1.79	0.626
Feel I am doing something useful or being productive / I have a sense of purpose and self-worth.	147	1.81	0.601
I can learn more about the cause for which I am working.	145	1.86	0.687
Work with a good leader.	150	1.86	0.666
Seeing improvements to the site / Help to restore the site.	146	1.86	0.758

Note. <sup>1</sup> Likert Scale: 1= Strongly Agree; 2= Agree; 3= Neutral; 4= Disagree; 5= Strongly Disagree



Table 24 (Continued)  
*Motivation Statistics -*  
*40 Questions<sup>1</sup>*

Question	N	Mean	SD
Consider volunteer activities as part of my recreation.	149	1.87	0.791
Volunteering allows me to gain a new perspective on things.	145	1.89	0.647
Enhances my skills.	149	1.93	0.741
I can learn how to deal with a variety of people.	152	1.93	0.761
Get to pursue a hobby or personal interest.	150	1.94	0.837
Seeing familiar faces.	151	1.97	0.642
Discouraged about loss or destruction of heritage sites even those that are far away.	152	2.03	0.805
Volunteering is a way to make new friends/Increases my social contacts.	151	2.03	0.795
Can work at my own pace.	152	2.05	0.770
Improves my quality of life.	150	2.06	0.753
I can explore my own strengths.	151	2.08	0.821
Volunteering makes me feel better about myself.	150	2.11	0.796
Activity is a stress reliever.	151	2.17	0.890
Others with whom I am close place a high value on community service.	145	2.18	0.855
Volunteering makes me feel needed.	153	2.19	0.849

Note. <sup>1</sup> Likert Scale: 1= Strongly Agree; 2= Agree; 3= Neutral; 4= Disagree; 5= Strongly Disagree

Table 24 (Continued)  
*Motivation Statistics -*  
*40 Questions<sup>1</sup>*

Question	N	Mean	SD
Volunteering increases my self-esteem.	143	2.20	0.827
Seeing improvements to the environment / Help to restore the environment.	150	2.25	0.919
Make decisions about projects.	149	2.33	0.858
Volunteering makes me feel important.	143	2.35	0.858
Get to do something physical or get physical exercise.	149	2.40	0.892
Commune with nature or observe nature / Chance to be outdoors in fresh air.	144	2.47	0.989
People I'm close to want me to volunteer.	143	2.50	0.985
Volunteering is an important activity to the people I know best.	148	2.50	0.993
My friends volunteer.	144	2.65	1.048
Experience solitude or a chance to reflect.	150	2.69	0.942
By volunteering I feel less lonely.	143	2.81	1.068
Volunteering helps me work through my own personal problems.	150	2.98	0.979
Volunteering experience will look good on my resume.	149	3.00	1.000

Note. <sup>1</sup> Likert Scale: 1= Strongly Agree; 2= Agree; 3= Neutral; 4= Disagree; 5= Strongly Disagree

Table 25  
*Motivation Statistics-*  
*27 Questions<sup>1</sup>*

(Cronbach $\alpha$ , Eigenvalue)	Factor Loading	Mean	SD	N
Category 1 (.87, 8.151)		1.78		139
I can do something for a cause that is important to me.	.738		0.626	152
This heritage area has become one of my favorite places/Would miss my heritage site if I moved.	.682		0.710	150
I am genuinely concerned about the particular group I am serving.	.670		0.695	145
Volunteering lets me learn things through direct, hands on experience/Get to learn new things.	.632		0.674	146
I am doing something for future generations.	.608		0.605	152
Volunteering allows me to gain a new perspective on things.	.606		0.647	145
Improves my quality of life.	.599		0.753	150
I feel it is important to help others.	.582		0.578	146
I can learn more about the cause for which I am working.	.581		0.687	145
Discouraged about loss or destruction of heritage sites even those that are far away.	.509		0.805	152

<sup>1</sup> Likert Scale: 1= Strongly Agree; 2= Agree; 3= Neutral; 4= Disagree; 5= Strongly Disagree

Table 25 (Continued)

*Motivation Statistics - 27 Questions<sup>1</sup>*

(Cronbach $\alpha$ , Eigenvalue)	Factor Loading	Mean	SD	N
Category 2 (.84, 2.532)		2.34		139
Volunteering makes me feel needed.	.857		.849	153
Volunteering makes me feel better about myself.	.798		.796	150
Volunteering increases my self-esteem.	.783		.827	143
By volunteering I feel less lonely.	.717		1.068	143
Volunteering makes me feel important.	.472		.858	143
Category 3 (.80, 2.104)		2.31		139
Experience solitude or a chance to reflect.	.783		.942	150
Commune with nature or observe nature/Chance to be outdoors in fresh air.	.774		.989	144
Make decisions about projects.	.667		.858	149
Seeing improvements to the environment/Help to restore the environment	.612		.919	150
Seeing improvements to the site/Help to restore the site.	.581		.758	146

<sup>1</sup> Likert Scale: 1= Strongly Agree; 2= Agree; 3= Neutral; 4= Disagree; 5= Strongly Disagree

Table 25 (Continued)

*Motivation Statistics - 27 Questions<sup>1</sup>*

(Cronbach $\alpha$ , Eigenvalue)	Factor Loading	Mean	SD	N
Category 4 (.73, 1.800)		2.45		137
My friends volunteer.	.774		1.048	144
Volunteering is an important activity to the people I know best.	.732		.993	148
People I'm close to want me to volunteer.	.726		.985	143
Others with whom I am close place a high value on community service.	.540		.855	145
Category 5 (.73, 1.271)		2.37		147
Volunteering is a way to make new friends/Increases my social contacts.	.794		.795	151
I can explore my own strengths.	.773		.821	151
Volunteering experience will look good on my resume.	.589		1.000	149

Note. <sup>1</sup> Likert Scale: 1= Strongly Agree; 2= Agree; 3= Neutral; 4= Disagree; 5= Strongly Disagree

Research question 4 asks "What are the social and psychological benefits of adult volunteers at heritage tourism sites?" Seventy-five percent of the participants (See Table 4, N = 153) said the social relationships that

they have made while volunteering at the site are Very Important or Important factors in their decision to remain a volunteer at the site. they have made while volunteering at the site are Very Important or Important factors in their decision to remain a volunteer at the site. Only five percent said social relationships are not important. Other social comments were highlighted in the responses for the facilitator, constraint and motivation questions.

A slight majority (54%, N = 85) of the participants responded to an open-ended question that asked them to describe what other benefits they got from volunteering. The low response rate may be due to the placement of this question immediately after the 40 motivation questions. Responses fell into four categories: self (42.1%), social (25.6%), altruistic (24.8%) and site (7.5%). See Table 27. Examples are provided of direct quotes pertaining to each subcategory for volunteering benefits.

1. Self (42.1%)

- a. Learning: "A learning experience of how things were done in the past." "Continue to learn about cooking in fireplace." "Develop interpersonal skills in a safe environment." "I am constantly increasing my knowledge base." "It is like going to school and learning with every exhibit." "Learning how to follow through from planning to

completion of new ideas." "I am learning with my daughters  
new skills and local history."

Table 26

*Motivations: Factor Solution*

Question	Factor loading				
Category	1	2	3	4	5
Question Number					
1. Altruistic					
29-18.	.738				
29-27/28.	.682				
29-6.	.670				
29-14.	.632				
29-30.	.608				
29-11.	.606				
29-29.	.599				
29-15.	.582				
29-9.	.581				
29-39.	.509				
2. Self-Improvement					
29-22.		.857			
29-23.		.798			
29-10.		.783			
29-7.		.717			
29-4.		.472			
3. Site related					
29-46.			.783		
29-48/49.			.774		
29-42.			.667		
29-36/37.			.612		
29-50/51.			.581		
4. Social					
29-2.				.774	
29-19.				.732	
29-3.				.726	
29-13.				.540	
5. Self Interest					
29-25.					.794
29-26.					.773
29-24.					.589

b. Personal enjoyment: "Self satisfaction and improvement." "Pride. Feeling of accomplishment." "It is more of a reward for me because I enjoy it." "It becomes a labor of love." "Makes me feel good." "Makes me feel important!" "Worthwhile work while enjoying the company of friends."

c. Improvement: "Have learned to talk in front of others." "I have acquired some new skills while working on projects." "It's great for my inner self." "Keeping skills from being lost." "Relieves the stress I have at home with a handicapped husband."

d. History: "I can expand my interest in history and love of teaching." "Time to reflect on times past." "I learned a good deal about some of the history of the county I live in."

e. Keep active: "Helps to keep me mentally active and semi-professionally involved during my retirement years." "There is a variety of things to do."

f. Perks: "Get book store discounts and free parking."

## 2. Social (25.6%)

a. New contacts: "Have met new people from different walks of life, different states." "I have met some wonderful people." "Meet interesting people." "Meet people



with same interest." "Opportunity to meet people from all over the world."

b. Friends: "Developing new friendships." "Have made some good friends." "Time spent with friends in a good atmosphere." "To meet and make new friends."

c. Family: "Close interaction with family, neighbors and friends, both old and new." "Opportunities to work with my husband and children in a variety of volunteer capacities."

d. Generations: "I feel a connection with older generations who can reflect on the heritage." "Interaction with kids is great."

### 3. Altruistic (24.8%)

a. Generations: "Have the opportunity to import the importance of history and respect for artifacts to young children." "I enjoy helping keep the volunteering for our future generations." "Generations need to know what the past was like." "Making history come alive for current and future generations." "The ability to see how my grand and great grand parents lived, worked and played." "To learn to appreciate my heritage, seven generations of hollow people."

b. History: "Being able to contribute some history and culture of the area. Also keeping our heritage alive

with generations to come." "Have the opportunity to import the importance of history and respect for artifacts to young children." "Making history come alive for current and future generations." "Preserving my rural heritage." "Creating an interest in history for visitors." "Pass on a love of history to students." "Preserve local history." "Pride in local history." "Sense that I am giving young people a sense of the important history in their community." "Keep alive the crafts of the past."

c. Community pride: "Initiate change for better of community." "Community spirit." "It makes our little town look good." "Pride in local history." "Stimulate resident's pride in community."

d. Give back: "I get to give knowledge to others about it." "Showing the importance of volunteering to my grandchildren, who also volunteer here."

e. Help out: "Help others, save sites." "I get to learn and help others."

f. Teaching: "Educating the public." "Helps others understand (historic skills)."

#### 4. Site (7.5%)

a. Preservation: "Satisfaction over the long term in helping to preserve a nationally significant site and community." "Preserve local history." "Help others, save

sites." "Preserving my rural heritage." "Keep alive the crafts of the past."

Table 27

*Benefits Received*

Category	Subcategory	Count	Percent
self	learning	20	15.0
	personal enjoyment	18	13.5
	improvement	8	6.0
	history	5	3.8
	keep active	4	3.0
	perks	1	0.8
	Subtotal	56	42.1
social	new contacts	19	14.3
	friends	9	6.8
	family	3	2.3
	generations	3	2.3
	Subtotal	34	25.6
altruistic	generations	14	10.5
	history	7	5.3
	community pride	6	4.5
	give back	2	1.5
	help out	2	1.5
	teaching	2	1.5
	Subtotal	33	24.8
site	preservation	10	7.5
	Subtotal	10	7.5
Total		133	100.0

Eight questions used a 5 point Likert scale to focus on how volunteering at heritage sites impact their lifestyle (See Table 28). The average values for Strongly Agree is 25%; the average for Agree is 36%; total for both is 61%. The comment *"I tell my friends about heritage issues"* got the highest total agreement (84%) for Strongly Agree and Agree. The next two highest comments *"I seek information about heritage areas"* and *"I have an interest in protecting heritage areas nationally"* got 82% total agreement. Heritage issues seem to be an important part of the lives of these participants.

#### *Satisfaction from Volunteering*

##### *Personal satisfaction*

Almost 84.5% of the participants are Very Satisfied and 13.5% are Somewhat Satisfied with their volunteer experiences at their site (See Table 29). Two percent chose Somewhat Dissatisfied. This general sentiment compares well with responses to five other Likert questions that asked the participants to respond to specific statements about their general satisfaction. The participants almost completely agree (Strongly agree and Agree) that: *"I enjoyed my volunteer experience"* (98%, N = 154); *"My volunteer experience was personally fulfilling"* (97.4%, N =

153); and "My volunteer experience was worthwhile" (97.3%,  
N = 153).

Table 28

*Impact on Lifestyle*

Question	Percent				
Percent (N, mean, SD)	SA	A	N	D	SD
I take vacations in heritage areas. (153; 2.27; 912)	22.2	35.3	37.3	3.3	2.0
I contribute money to heritage organizations. (153; 2.18; .859)	22.9	42.5	29.4	4.6	.7
I seek information about heritage areas. (153; 1.91; .798)	31.4	51.0	13.7	3.3	.7
I explore new heritage areas nearby. (145; 2.03; .790)	24.1	53.8	17.9	3.4	.7
I protest when heritage sites are threatened. (151; 2.17; .992)	30.5	30.5	33.1	3.3	2.6
I tell my friends about heritage issues. (151; 1.87; .814)	33.8	50.3	13.2	.7	2.0
I write letters or articles about heritage issues. (150; 2.84; 1.024)	10.0	24.0	45.3	13.3	7.3
I have an interest in protecting heritage areas nationally. (149; 1.91; .774)	30.9	51.0	15.4	2.0	.7
Average	25.7	35.9	25.7	4.2	2.1

Note. Code: SD = strongly agree; A = agree; N = neutral; D  
= disagree; SD = strongly disagree

Table 29

*Volunteer Satisfaction*

Question	Percent		
Percent (N, mean, SD)	Strongly Agree	Agree	Neutral
I enjoyed my volunteer experience (154; 1.37; 1.00)	64.9	33.1	1.9
My volunteer experience was personally fulfilling. (153; 1.42; .545)	60.8	36.6	2.6
My volunteer experience was worthwhile. (153; 1.41; .544)	61.4	35.9	2.6
I feel that my contribution has been very important to this heritage program. (153; 1.62; .752)	53.6	31.4	14.4
I accomplished some good through my work. (154; 1.53; .649)	55.8	35.7	8.4
	<u>Very Satisfied</u>	<u>Somewhat Satisfied</u>	<u>Somewhat Dissatisfied</u>
How satisfied are you with your volunteer experiences at this site? (155; 1.19; .523)	84.5	13.5	1.9

### *Satisfaction with Management of Volunteers*

Research question 12 asks *"What is the level of satisfaction felt by adult volunteers at heritage tourism sites with the volunteer recruitment and retention methods?"* Participants answered 13 questions to rate the management practices at their site. The majority of participants responded that these issues are important and in all cases but one, just enough attention is provided (See Table 30). "Interaction with other volunteers", "Management of site resources", and "Management of volunteers" received the highest ratings of importance (over 90% agreement). "Written job descriptions for volunteers" received the lowest rating of importance (61.4%) and the highest agreement that none are provided (23.3%). "Volunteer recruiting procedures" received a high (80.9%) agreement for importance but about a 50/50 agreement whether just enough (45.2%) is provided or not enough is provided (40.5%).

Participants added other comments about their volunteer experience at their heritage site and this questionnaire. A low 29% (N = 46) of the participants responded to the open-ended question about their personal volunteer experience, and 16% percent (N = 26) responded to the open-ended question about the questionnaire.

Table 30

*Rate Management Practices (at this site or organization)*

Percent (N)	Importance	Amount Provided			
	Is Important	TM	JE	NE	NP
Supervisory attention (136)	77.2	1.6	80.3	14.2	3.9
Training/instruction to do my volunteer work. (139)	84.9	.8	82.2	11.6	5.4
Volunteers are asked about their interests at the site. (143)	81.1	3.8	73.5	15.2	7.6
Volunteers are provided opportunities to pursue their interests at the site. (141)	83.7	1.5	79.4	12.2	6.9
Positive feedback about or recognition for my work. (142)	73.2	1.5	85.5	6.9	6.1
Interaction with other volunteers. (142)	93.0	1.5	83.0	14.8	.7
Written job descriptions for volunteers. (140)	61.4	.8	57.4	18.6	23.3
Volunteer recruiting procedures. (136)	80.9	---	45.2	40.5	14.3
Interaction with paid staff. (141)	85.1	.8	88.7	9.0	1.5
Management of site resources. (140)	92.1	3.1	72.4	22.0	2.4
Management of staff. (138)	84.8	---	84.1	13.5	2.4
Management of volunteers. (138)	92.3	.8	79.7	17.2	2.3
Volunteer records management. (142)	77.5	1.6	76.4	17.1	4.9

Note. Code: TM = too much; JE = just enough; NE = not enough; NP = not provided



Responses are grouped into positive (77%) and negative (23%) feedback. Examples are provided of direct quotes pertaining to each response category.

1. Positive feedback (77%)

a. Site: "First class site and staff; site is well taken care of." "I love this place". "Our site won the prestigious international award for volunteerism: 'Albert Corey Award". "Very organized place to volunteer!"

b. Staff: "Lots of new ideas and enthusiasm. Treats provided." "Concern for volunteer needs." "This place lets you learn and encourages you to pursue your own interests". "Each volunteer is provided with a well-organized volunteer manual." "The people here take their jobs seriously and continue to make improvements."

c. Volunteers: "Opportunity to get to know staff and volunteers."

d. Self:

i. Learning: "Enjoyed studying about the changing exhibits and meeting people". "Positive feedback." "A great or wonderful experience." "I have grown as a person by being here." "I have learned a lot of history; made many new friends; enjoyed every minute." "It was often difficult and frustrating, but overall, we had fun!" "Very fulfilling experience." "I

wish I had more time to volunteer; "Enjoy interacting with kids." "Helps me keep my skills current."

ii. Rewards: "I have been recipient of PHMC's "Volunteer of the Year" award and the "Distinguished Volunteer" award." "It is rare for a reenactor (Civil War) to get to participate on the actual ground that on which a battle was fought. And get to care for the upkeep of the grounds/structures to maintain the authenticity and educational value of the site."

iii. Family: "Volunteering is a major part of our family life. We feel it's important to give back our time and talents to community services. Our grandchildren carry on that ethic in their own families. We can look back on our years of unpaid work and say 'We did some good things that resulted in lasting benefits for future generations.'"

e. Other: "Friendly atmosphere." "No long term impact from past internal or external difficulties." "Opportunity to talk to people from all over the country and world." "This site would not operate without volunteers." "If everyone could learn to appreciate their history and heritage the way my family has, perhaps people would become more easy going, laid back and neighborly."

2. Negative feedback:

a. Staff: "Have not heard anything about my volunteer performance." "Not encouraged by certain management." "No volunteer program." "Need someone to track volunteer hours." "Paid staff needs more supervision."

b. Volunteers: "Expected to be used more." "New members are not welcomed or listened to." "Volunteer Board size is too large and turnover is not frequent enough." "Need more younger volunteers." "Need to get people to feel that the site is important." "No volunteer training program." "Need to educate volunteers how to greet visitors and provide information about our heritage." "Not enough communication." "Not enough recognition of volunteers; managers need to give more notice when they need volunteers." "Allow volunteers a break to participate in or see other activities during a special event." "Also, I believe if more rewards and appreciation was shown for volunteers then it would increase our numbers considerably."

c. Visitors: "Would like occasional meetings with management to discuss customer reactions." "I just wish we could provide more activities to our guests. The islands potential is amazing but we don't seem to be using this effectively to our advantage."

### Survey Feedback

A low 16% (N = 26) of participants responded to the open-ended question about the questionnaire format and content. The low response rate could be because this was the last question on a long survey. Most comments on the overall survey were positive:

"People who invest significant time to volunteer at a site do so for a wide variety of reasons, from strong personal interest to ego and social status. The reason is largely unimportant, but leadership and fellow volunteers must not loose sight of the importance of seeing that volunteers get satisfaction from their service no matter their motivation, and of avoiding conflicts among volunteers that can erupt because of the diversity of motivations."

"Volunteers do make a difference. Volunteerism is the backbone of this country."

"I enjoy learning and becoming knowledgeable about historical sites. Fort Roberdeau is a beautiful place and so are the people there. I have learned so much over the years. Enjoy touring, telling stories, teaching dance and all the other work I do there."

"I would quit volunteering if my friends quit or the Corp of Engineers was not so cooperative. Time is scarce for me or I'd do more."

Two persons said the questions were good and comprehensive.

The negative comments included: "Need more questions about what volunteers need or why more people don't volunteer." Six participants responded that the survey was too long. One person questioned the ethnicity/race question. Another person questioned the income question. Two questioned why questions were repeated in different ways. Two persons said they would have answered more questions if they got the questionnaire sooner from the site person.

#### Summary Comments

Common themes occurred in the responses to questions about motivations, original reasons, facilitators, constraints, and benefits. Table 31 summarizes the themes. The open-ended question about original reasons preceded the 40 Likert scale questions about motivations. The other three open-ended questions followed the questions about motivations. The most important factors or categories that affect these heritage tourism volunteer participants are: Altruistic reasons influence volunteer motivations (37.0%)

and original reasons to volunteer (33.0%). Self-interest reasons influence original reasons to volunteer (33.9%), constraints to volunteering (50.8%) and other benefits received (36.1%). Facilitators that affect volunteering are almost equally influenced by site (28.5%), social (27.7%) altruistic (23.4%) and self-interest (20.4%) issues.

Table 31

*Common themes*

Category (Percent)	Factored Motivations	Original Reasons (N = 145)	Facilitators (N = 99)	Constraints (N = 62)	Other Benefits (N = 85)
Altruistic	37.0	33.0	23.4	----	24.8
Social	14.8	18.6	27.7	14.3	25.6
Self- interest	11.2	33.9	20.4	50.8	36.1
Self- Improvement	18.5	---- <sup>a</sup>	---- <sup>a</sup>	---- <sup>a</sup>	6.0 <sup>b</sup>
Site	18.5	14.5	28.5	34.9	7.5

Note. <sup>a</sup> Self improvement is included in self interest. <sup>b</sup> Add self interest and self improvement.

*Motivation*

Table 32 provides a comparison of the factor results for this research with the VFI factor results from the Clary et al. (1998) research. Clary et al. (1998) used two sample groups, identified here as VFI-1 and VFI-2. All of the factors for this research scored positive while many of factors in the Clary et al. (1998) research scored

negative, indicating an inverse relationship. A few factors for this research scored higher than some factors for the Clary et al. (1998) research while a few scored lower.

Table 32

*Factor Comparison - Motivations<sup>1</sup>*

	Factor Loading	VFI-1	VFI-2
Category 1-Altruistic	N= 158	N= 427	N= 532
I can do something for a cause that is important to me.	.738	.62	.56
This heritage area has become one of my favorite places/Would miss my heritage site if I moved.	.682	----	----
I am genuinely concerned about the particular group I am serving.	.670	.64	.50
Volunteering lets me learn things through direct, hands on experience/Get to learn new things.	.632	-.64	-.55
I am doing something for future generations.	.608	----	----
Volunteering allows me to gain a new perspective on things.	.606	-.56	-.55
Improves my quality of life.	.599	----	----
I feel it is important to help others.	.582	.70	.64
I can learn more about the cause for which I am working.	.581	-.43	-.42
Discouraged about loss or destruction of heritage sites even those that are far away.	.509	----	----

Note. <sup>1</sup> Likert Scale: 1= Strongly Agree; 2= Agree; 3= Neutral; 4= Disagree; 5= Strongly Disagree

Table 32 (Continued)

*Factor Comparison - Motivations<sup>1</sup>*

	Factor Loading	VFI-1	VFI-2
Category 2 Self-Improvement	N= 158	N= 427	N= 532
Volunteering makes me feel needed.	.857	-.75	.43
Volunteering makes me feel better about myself.	.798	-.64	.55
Volunteering increases my self-esteem.	.783	-.75	.43
By volunteering I feel less lonely.	.717	.63	.61
Volunteering makes me feel important.	.472	-.62	.40
Category 3 Site-Related			
Experience solitude or a chance to reflect.	.783	----	----
Commune with nature or observe nature/Chance to be outdoors in fresh air.	.774	----	----
Make decisions about projects.	.667	----	----
Seeing improvements to the environment/Help to restore the environment	.612	----	----
Seeing improvements to the site/Help to restore the site.	.581	----	----

Note. <sup>1</sup> Likert Scale: 1= Strongly Agree; 2= Agree; 3= Neutral; 4= Disagree; 5= Strongly Disagree



Table 32 (Continued)

*Factor Comparison - Motivations<sup>1</sup>*

	Factor Loading	VFI 1	VFI 2
Category 4 Social	N= 158	N= 427	N= 532
My friends volunteer.	.774	.58	.65
Volunteering is an important activity to the people I know best.	.732	.80	.73
People I'm close to want me to volunteer.	.726	.59	.66
Others with whom I am close place a high value on community service.	.540	.79	.78
Category 5 Self-Interest			
Volunteering is a way to make new friends/Increases my social contacts.	.794	-.42	.35
I can explore my own strengths.	.773	-.82	-.69
Volunteering experience will look good on my resume.	.589	.68	.59

Note. <sup>1</sup> Likert Scale: 1= Strongly Agree; 2= Agree; 3= Neutral; 4= Disagree; 5= Strongly Disagree

The factor results from this research that closely compared to the two sets of Clary et al. (1998) factor results include these three statements:

Altruistic: *"I am genuinely concerned about the particular group I am serving"* (.67 vs. .64, .50)

Social: *"Volunteering is an important activity to the people I know best."* (.732, vs. .80, .73)

Self-interest: "*Volunteering experience will look good on my resume*" (.589 vs. .68, .59).

### *Satisfaction*

Clary et al. (1998) studied the level of satisfaction and personal fulfillment of 61 older volunteers, mean age = 70 years at a community hospital. Compare that to the sample of 158 heritage tourism volunteers, mean age between 50 and 69, in this research. Their research used a 7-point Likert scale while this research used a 5-point Likert scale. The six Clary et al. (1998) questions were changed to 5 statements for this research. The internal reliability alpha for the 5 statements is .90. The internal reliability alpha for the 6 Clary et al. questions was .85. Almost all of these heritage tourism participants (84-99%) were satisfied and personally fulfilled from their volunteer experience.

## CHAPTER 5-CONCLUSIONS

This chapter provides explanations of the results obtained for the research questions that were investigated, gives limitations of the study, recommendations for further study and management implications.

### Objectives

This research investigated adult volunteers at 17 heritage tourism sites in southwestern Pennsylvania and northern West Virginia to mainly identify their sociodemographic characteristics and motivations for volunteering. Other parameters included: (a) history of volunteering, (b) level of interest in heritage tourism, (c) level of satisfaction with the heritage organization's program for managing and retaining volunteers, (d) type of benefits received, (e) original reasons for volunteering, (f) level of commitment, (g) constraints and facilitators to volunteering, (h) social consequences; and (i) attachment to activity and place. The study emphasized populations aged 50 or older. The heritage tourism organizations also provided general background information.

The study specifically focused on developing a model to explain the factors that affect motivations of heritage tourism volunteers. The results were analyzed to identify

the significance of characteristics, factors and any relationships. The study answered 12 research questions and other general questions which are repeated here.

#### Research Questions

This descriptive research study included the following questions and other parameters.

Q1 What is the frequency of adult volunteering in general and in particular at heritage tourism sites? Do older adults volunteer more than other age groups?

Q2 What are the motivations of adult volunteers at heritage tourism sites?

Q3 What type of benefits do adult volunteers at heritage tourism sites experience - intrinsic or extrinsic?

Q4 What are the social and psychological benefits of adult volunteers at heritage tourism sites?

Q5 What is the level of place attachment for adult volunteers at heritage tourism sites?

Q6 What is the level of activity attachment for adult volunteers at heritage tourism sites?

Q7 What are the education levels of adult volunteers at heritage tourism sites? Are older volunteers at a higher education level than the average adult American?

Q8 What are the income levels of adult volunteers at heritage tourism sites? Are older volunteers in a higher income class than the average adult American?

Q9 What is the gender distribution of adult volunteers at heritage tourism sites? Do older women volunteer more than older men?

Q10 What is the history of volunteering of adults at heritage tourism sites? Do older volunteers have a history of volunteering for various causes and organizations throughout their lifespan?

Q11 What are the volunteering constraints or facilitators (e.g., managerial site conditions, physical mobility, transportation access, free time, personal health condition) that are important factors for involvement of adult volunteers at heritage tourism sites?

Q12 What is the level of satisfaction felt by adult volunteers at heritage tourism sites with the volunteer recruitment and retention methods?

The subjects were evaluated for these characteristics:

1. Demographics: age, race, sex, income level, educational level, major current or last occupation type, citizenship, state of origin of the subjects marital status, and perceived level of health.

2. Heritage tourism interest/specialization level in general and specific to the site;

3. Volunteer data: When it began - the age when the person first volunteered for any cause, the length of service as a volunteer in general and as a volunteer at the site, frequency of participation how much time do volunteers invest, participation with family or friends, and length and duration of travel to the site;

4. Personal satisfaction level with the volunteering opportunity and the volunteer management practices; and

5. Type of benefits received. The types of volunteer benefits may include: volunteer compensation, educational opportunity, social contact, skills enhancement, improved self-concept or awareness, or improved psychological situation (e.g., less stress).

For general background information, the heritage tourism organization was asked:

1. Site information: type of site, number of visitors a year, number of full time employees, and operating seasons and days a year;

2. Volunteer information: number of paid and unpaid volunteers recruited a year; and

3. Volunteer procedures: e.g., recruitment, hiring, and firing performance evaluation, and reward.

### Volunteer Characteristics

This research assumed that volunteers at heritage tourism sites would show similar characteristics to heritage tourists. Confer and Kerstetter (2000) summarized a general profile of the heritage tourist in southwestern Pennsylvania as slightly older (average age: 48), well educated (67 percent had at least some college), and with an above-average annual income (60 percent made more than \$40,000).

#### *Age*

The original intent was to focus on adult volunteers aged 50 or over. Although sampling limitations required collection of data from adults aged 18 or older, the majority of participants fell within the 50 and over age group (77%) and are retired (57%). Therefore, much of the literature review applicable to older adults can be compared with these results. Surveys showed that between 1977 and 1986, almost 44 percent of those between ages 50 and 74 did volunteer work (Gerber et al., 1989).

#### *Education*

Education level is found to be a predictive variable in research on participation in both voluntary associations and outdoor recreation (Dennis & Zube, 1988). The leisure motivation model (Beard & Ragheb, 1983) includes an

intellectual component that assesses the extent to which individuals are motivated to engage in leisure activities which involve substantial mental activities such as learning, exploring, discovering, creating, or imagining. Dennis and Zube (1988) and Caldwell and Andereck (1995) both found that intellectual pursuit is a top incentive for joining a voluntary organization.

Many volunteers derive great personal satisfaction from being able to apply the expertise they gained from their former careers (Winter, 1998a). Many participants in this study are former educators (26%) or other professionals who want to continue maintaining or improving their skills, and pass on their knowledge to other generations. Scott (1996) says that sharing and distributing information is the first step to keeping volunteers motivated.

A majority of participants (77%) have attended some college or have college degrees. Surveys showed that between 1977 and 1986, college graduates over 50 did more unpaid volunteer labor than anyone else (Gerber et al., 1989). The importance of intelligence in the aging process is discussed in the gerontology literature. Lifelong learning was a characteristic of most of the best examples of successful aging (Vaillant 2002; Goldman, Klatz, &



Berger, 1999). Goldman et al. (1999) reported that study after study shows that a person's level of education and the mental demands of an occupation or daily activities can guard against dementia.

### *Income*

The median income range was \$41-60,000, similar to what Confer and Kerstetter (2000) found. These incomes may reflect the real world retirement incomes of older adults, who made up a majority of the participants in this study. The income data, however, may not accurately reflect the sample population because 23 percent of the participants declined to provide income data. The participants under-represent annual incomes over \$60,000 (15%) compared to national (33%) and Pennsylvania (30%) levels. The under \$20,000 (26%) and \$21,000 to \$40,000 (19%) income levels of this sample also under-represent the West Virginia income demographic (34% and 29%, respectively). This sample of participants mainly represents lower to middle class levels. Kaplan (1979) did find that the composition of volunteerism has increasingly moved down into the social class scale, since more middle-class men and women have the time, or see fit to use their free time, for service to others.

### *Gender*

The majority female composition (59%) of this volunteer sample is slightly higher than national and state values. The older female (50 and over age) subgroup (61%) is about double the national value and three times the state values. Reported research suggests that older women have more free time than do older men (Robinson, Werner, & Godbey, 1997) and tended to be more involved in leisure activities than men (Losier, Bourque, & Vallerand, 1993). No gender difference analysis was conducted in this study but could be done at a later date. However, gender results should not be of concern for application because other leisure motivation research found almost no gender differences (Weissinger & Bandalos, 1995).

### *Ethnicity*

The homogeneous ethnic composition of the sample (98% white) is about 27% higher than the national average, 14% higher than the Pennsylvania average and about the same for the West Virginia average. Almost all participants (99.3%) are native-born citizens. Reported research says that volunteers today come from all economic groups, races, and communities. Hispanic baby boomers are third in number of volunteers behind Whites and African Americans but rank first in hours volunteered per person (Powers, 1998).

### History of Volunteering

These participants have a rich history of volunteering either at their heritage tourism site or for other community activities. Fifty-seven percent have volunteered at their heritage tourism site for 5 years or more; 29% have volunteered for 11 or more years. Over one third of all the participants (37%) and 45% of the older adults have volunteered more than 30 years. Volunteering is a behavior that, if established early, continues throughout life (Powers, 1998). Age 4 is the earliest age when one of these participants first started volunteering. Age 32 is the mean age of the participants in this study. Research reveals that between age 30 and 45 our need for achievement declines and our need for community and affiliation increases (Vaillant, 2002). Prentice (1993) found in a study of heritage tourism visitors, that age was important in that persons in their 30s were much more likely than others to give educational motivations. Life-course research shows that mid-lifers have good health and unfettered time and are creating their own life course and shaping it themselves (Powers, 1998).

About 19% of the participants started volunteering within the last year. This indicates that a large part of the population would be interested in volunteering. Many of

the participants said they originally volunteered because they were asked to volunteer.

About 71% of the participants volunteer for at least one other cause and the majority of the responses (58%) indicated they volunteered at their local church. In many communities, church is the gathering place for all manner of social activities. Kaplan (1979) said that one of the needs and drives of the elderly in respect to leisure is a need to be considered a part of the community. Guinn's (1995) research on leisure satisfaction and the leisure repertoire of older persons ranging in age from 59 to 91 years found that both overall and component satisfaction were related to repertoire size and those persons with a larger repertoire differ significantly in component satisfaction from those with smaller repertoire. Guinn (1995) indicated that this was supported by past research that showed that the number of activities participated in are more significant than involvement frequency. Nineteen percent of the volunteers also volunteer at other heritage sites. One Civil War re-enactor said he volunteers at over 500 other heritage sites. No comparison analysis was done between volunteer frequency and the number of volunteer activities in this study.

### Commitment

About 92% of the participants have a medium to high level of commitment to volunteering. An overwhelming 88% said they will volunteer the same or more at their heritage tourism site. According to Powers (1998), most of us say that if we had the choice we'd reduce the amount of time we spend in paid work and increase the hours we spend engaged in volunteer activities. Ryan et al (2001) found that the role of knowledge or expertise is a significant factor in both commitment and duration of volunteering. Weissinger and Bandalos (1995) found that persons high in the commitment intrinsic motivation component tend to value leisure behaviors, and feel dedicated to leisure in their lives. Powers (1998) found that regular volunteers develop more formal and ongoing relationships with the volunteer organizations, they become involved out of personal commitment and gain a sense of gratification and accomplishment or some other reward. However, in their study of volunteer motivations, Caldwell and Andereck (1994) could not determine whether the most active members are the most committed. No comparison analysis was done between commitment and motivation data in this study.

## Social

Samdahl and Jekubovich (1997) found the social relationships are the most influential factors that shape the process that affect people's leisure. For their research, the activity itself was often secondary to or at least deeply imbedded within, the social environment in which that activity occurred.

Volunteering at heritage tourism sites appears to be a social activity that involves married couples, other family members and old and new friends. The majority of participants has or has had some family or social life which some identified as reasons that affect their level of volunteering interest. The best marketing tool to attract new volunteers is word-of-mouth (45%) transfer of information among friends, family members or acquaintances. Some participants (15.4%) commented that they originally volunteered for social reasons because a friend or family member was involved and showed enthusiasm. Caldwell and Andereck (1994) found that more active participants received more personal, social or communal benefits than did less active participants.

Losier, Bourque, and Vallerand (1993) found that only marital status and gender sociodemographic variables were related to leisure satisfaction or leisure participation in

the elderly. In this sample, 67% of the participants are married, eight percent once were married and 13 percent are widowed. Several participants commented that they originally volunteered because their spouse volunteered. Others said that the health of other family members can influence their volunteer frequency. Losier, Bourque, and Vallerand (1993) found that elderly individuals who were not married experienced greater leisure satisfaction than those that were married. No comparison analysis was done between married and non-married or widowed participants.

The leisure motivation model (Beard & Ragheb, 1983) includes a social component that includes two basic needs. The first is the need for friendship and interpersonal relationships, while the second is the need for the esteem of others. Social status has been established as a predictive variable in voluntary research (Dennis & Zube, 1988). A majority of participants (75%) believe that social relationships that they have developed at the site are important to whether they remain a volunteer. Twenty-two percent of the participants volunteer with three or more friends; 13 percent volunteer with two friends and 14 percent volunteer with one friend.

Ryan et al. (2001) found that active volunteers were significantly more likely to have friendships in the group

(i.e. social motivations). Caldwell and Andereck (1994) found that more active participants received more personal, social or communal benefits than did less active participants. Vaillant (2002) found that learning to play and create after retirement and learning to gain younger friends as we lose older ones are important to older adults. Further, life-long studies repeatedly show that it is social aptitude - sometimes called emotional intelligence - not intellectual brilliance or parental social class that leads to a well-adapted old age (Vaillant, 2002). Aging retired persons who often see a reduction in social activities may maintain social involvement with increased leisure participation (Losier, Bourque, & Vallerand, 1993). No comparison analysis was done between the number of friends who volunteer together and their satisfaction levels.

#### Place Attachment

Fifty percent of the volunteers have a high attachment to their heritage site. They place higher importance (very important and important) on the site (81%) and historic structures (79%) than on the natural resources (64%). Eight-eight percent said their site has become one of their favorite places. Eighty-nine percent live near their heritage site and 82% have lived in the general area for 10



years or more. Proximity to and being native to the geographic area are important parameters to know about volunteers. Prentice (1993) found in a study of heritage tourism visitors that the frequency of use and affection for landscape amenities are associated with greater knowledge of the area. The place attachment questions are highly inter-correlated (Chronbach  $\alpha = .88$ ) and could be a stand alone tool.

#### Activity Attachment

A majority of participants (62%) agree that their activity at the heritage site influences their decision whether to volunteer. Participants have much interest in history in general, local community history, their family ties to the local history and the specific site history. Many participants are former history teachers. Forty-five percent of the participants perform some duty that tells or demonstrates the story of the site or historical times. Other participants are content to help out wherever there is a need (e.g., keeping financial records, raising funds, organizing special events, running the gift shop or visitor center desk, doing historical research, and maintaining the library or exhibits).

Volunteering at their heritage tourism sites is a good learning opportunity for most of the participants. From

when they first started to volunteer at the heritage site, a majority of participants greatly increased their level of interest in (64%) and participation in learning about (63%) history, culture and heritage topics, in general. A majority of participants also greatly increased their level of interest in (74%) and participation in learning about (61%) local heritage issues, in particular. Eighty-one percent showed a great increase in their level of understanding of their heritage site, in particular.

Volunteerism can be equated positively with leisure activity, thus there is a good match for older adults and leisure organizations (Tedrick, Davis, & Coutant, 1984). Many participants said that they are volunteering to stay active in their later years, to contribute to their community to make it a better place to live or keep its history alive, and to give back to future generations. One of the six tasks in Vaillant's (2002) model of adult development is *Generativity*. Mastery of generativity tripled the chances that the adult's decade of the 70s would be a time of joy and not of despair. The adult becomes "The Keeper of the Meaning" which involves passing on the traditions of the past to the next generation.

### Constraints and Facilitators

Guinn (1995) said that leisure constraints of aging could be economic, health and physical. Robinson, Werner, and Godbey (1997) studied the free time and retirement of older adults and found on average, about 12 of the late-life years will be relatively healthy, however, time spent on away-from-home activities drops with age. About 88% of the participants said they are in good to excellent health and 75% said their health is somewhat to very important to whether they volunteer.

Samdahl and Jekubovich (1997) reassessed a leisure constraints model and identified three primary sources for leisure barriers: structural, interpersonal, and intrapersonal. A structural barrier might be available transportation. Access to transportation to the site is an issue for 42% of the participants but not an issue for 49% of them. Travel time to the site is a concern to 56% of the participants but not a concern for 44%. Seventy-eight percent of the participants are within a 30-minute drive of the heritage site. Because opinions are split on these questions, managers could try to attract dedicated and passionately interested volunteers from other locations outside their general geographic area.

Volunteering at heritage tourism sites is affected by social, altruistic, self-interest and site-related reasons. Social reasons occurred 18.6% of the time as an original reason to volunteer, and 27.7% and 14.3%, respectively as facilitators and constraints to volunteering. Altruistic reasons occurred 33% of the time as an original reason to volunteer and 23.4% as facilitators to volunteering but none were given as constraints. Caldwell and Andereck (1994) found that the most important reason for joining and continuing membership in a recreation-related voluntary association was to contribute to society. They also found that women in a voluntary organization ranked making a societal contribution at a higher importance than did men. Gender differences were not evaluated in this study.

Handy et al. (2000) found that most volunteers are not purely altruistic, and acknowledge the fact that they benefit from the volunteer experience (or else they would soon quit). Beyond altruistic motives, the volunteer often has self-interested motives that could be extrinsically or intrinsically driven. Volunteers may desire social interaction, affiliation and belonging; status, prestige or power; personal growth, achievement and a sense of accomplishment; and self-image enhancement or for a sense of self-worth and value (Crompton, 1999). Self-interest

reasons occurred 33.9% of the time as an original reason to volunteer and 20.4% and 50.8%, respectively as facilitators and constraints to volunteering.

Site related reasons occurred 14.5% of the time as an original reason to volunteer and 28.5% and 34.9%, respectively as facilitators and constraints to volunteering. The most mentioned original reasons to volunteer were to "altruistic-help out" (22.6%) and something related to "self-history" (19.0%). The most mentioned facilitators to originally volunteering are "site-management" (22.6%) and "social-friends" (22.6%). The most mentioned constraint to originally volunteering is "self-lack of time" (32%).

#### Benefits/Satisfaction

Participants mentioned similar categories of benefits received from their volunteering activities (altruistic (24.8%), social (25.6%), self-interest/self-improvement (42.1%) and site-related (7.5%). The most mentioned benefits were "self-learning" (15%), "social-new contacts" (14.3%) and "altruistic-generations" (10.5%). The need to render some socially useful service was the first of the needs and drives of the elderly in respect to leisure (Kaplan, 1979).

Almost 84.5% of the participants are Very Satisfied and 13.5% are Somewhat Satisfied with their volunteer experiences at their site. Clary et al., (1998) found that volunteers who received benefits to their primary functional motivations were not only satisfied with their service but also intended to continue to volunteer in both the short- and long-term future. No comparison analysis was done between benefits and satisfaction.

#### Motivations

Forty motivation statements were analyzed in this study. The two statements with the highest means are: "I feel it is important to help others" (mean = 1.51) and "I am doing something for future generations" (mean = 1.57). A five component, 27 factored statement model resulted. The components are highly inter-correlated (Chronbach  $\alpha$  = .73 - .84). The model can be used as a stand-alone tool to measure motivations of volunteers at other heritage tourism sites. The number of statements could be further reduced to 20 if the scale construction criteria included factor loadings equal to or greater than .60 rather than .45. Participants in this study were motivated to volunteer for altruistic reasons (37%), self-improvement/self-interest reasons (29.7%), site-related reasons (18.5%) and social reasons (14.8%). These results are similar to the original

reasons for volunteering: altruistic (33.0%), self-interest (33.9%), site-related (14.5%) and social (18.6%).

The top statements in each motivation component were:

1. altruistic - I can do something for a cause that is important to me.
2. self-improvement - Volunteering makes me feel needed.
3. site-related - Experience solitude or a chance to reflect.
4. social issues - My friends volunteer.
5. self-interest - Volunteering is a way to make new friends / Increases my social contacts.

The motivations statements were assembled from motivation measurement tools discussed in the literature for environmental volunteers (Ryan, et al., (2001), other volunteers (e.g., Volunteer Function Inventory (Clary et al., 1998)) and other recreation research.

Clary et al. (1998) used principal-axis factor analysis, oblique rotation, to analyze responses. The 30 motivation statements fell under 6 equally grouped components: (a) enhancement, (b) career, (c) social, (d) values, (e) protective and (f) understanding. These statements were on a 7-point Likert scale.

This research used SPSS statistical software and principal-axis factor analysis, varimax or orthogonal rotation. These statements had a 5-point Likert scale and factored into five unequal components: (a) altruistic - 10, (b) self-improvement - 5, (c) site-related - 5, (d) social - 4 and (e) self-interest - 3. Eighteen of the 27 statements match statements in the Clary et al. (1998) model. Based on the definitions in Clary et al. (1998), these components would be similar: altruistic vs. values; self-improvement vs. understanding or enhancement; self-interest vs. protective or career; and social vs. social. There is no match for the site-related statements used in this study. Table 32 provided a comparison of the factor results for this research with the factor results from the Clary et al. (1998) research.

Ryan et al. (2001) grouped 19 motivation statements under 5 similar components (compared to components in this study): (a) Helping the environment - 2 (altruistic), (b) learning - 3 (self-improvement), (c) project organization - 4 (site related), (d) social - 3, and (e) reflection -4 (self-interest). Four of the 27 statements from this study match statements in the Ryan et al. (2001) model. Ryan et al. (2001) reported component statistics and not individual



data for each question. Therefore, a direct comparison of factors cannot be done with this data.

Prentice's (1993) research on heritage tourists included six motivations: (a) pleasure of viewing, (b) education, (c) information, (d) relaxation, (e) entertainment, and (f) exercise. Masberg and Silverman's (1996) study of student heritage visitors found seven themes: (a) activities, (b) companions, (c) site personnel, (d) information, (e) built environment, (f) nature, and (g) culture. Most descriptions included a combination of aspects.

The leisure motivation model developed by Beard and Ragheb (1983) has four components: (a) intellectual, (b) social, (c) competence-mastery (usually physical in nature) and (d) stimulus-avoidance (i.e., seek solitude or rest). Caldwell and Andereck (1994) found that purposive or normative benefits (i.e., appeal to values such as community action and support, civic responsibility, and environmental concern) are the strongest motives for joining a voluntary association followed by solidary or affective benefits (i.e., derived from social interaction, interpersonal relationships, friendships, group status, and group identification), then material or utilitarian benefits.

The leisure participation and motivation model developed by Lounsbury and Hoopes (1998) has six motivation factors: (a) engaging in a favorite leisure activity, (b) achievements, (c) supervising others, (d) social interactions, (e) creativity, (f) physical activity, and (g) mental activity. The Intrinsic Leisure Motivation scale has four components: (a) self-determination (in-control), (b) competence, (c) commitment and (d) challenge (exceed skills) (Weissinger & Bandolos, 1995).

The conclusion is that existing leisure motivation models have similarities and differences. This study attempted to extract the most relevant parts of the models to study heritage tourism volunteers. The results show that research needs to be tailored to the specific situation.

#### Limitations

There could be a number of factors that affect the results of this study.

One factor could be the sample size. A low sample number ( $N = 158$ ) could be bias because of lack of adequate information. The number of respondents could not be representative of the entire heritage tourism volunteer community in the United States.

Another potential limitation is the type of heritage sites in the selected geographic regions may not represent

the entire diversity of heritage tourism sites across the United States.

Another potential limitation is that the characteristics of the participants in this study may not represent volunteers at other heritage tourism communities. Demographic differences in other geographic areas will affect the type of volunteer recruitment population available.

The use of a combination of qualitative and quantitative questions for the same topic in this study reduces but does not eliminate bias among study participants. The quantitative motivation tool for example, gave lower rankings for social statements while the open-ended qualitative questions showed more frequent use of and thus an assumed higher ranking for social statements. The same is true for self-interest statements.

The 27 statement motivation model developed in this study factors more cleanly with direct (positive) results than does the original 30 statement Volunteer Functions Inventory (VFI) (Clary, et al, 1998) for volunteers in general from which this new model was derived. The obvious differences between the model factor results may mean that this model may be limited to study of heritage tourism

volunteers. This model also has a site-related component which the VFI model does not.

This study may also have bias toward experienced, long time volunteers who are native to the geographic area near the heritage tourism site. Recruiting methods for new volunteers would need to assess the potential volunteer's interests and preferences for work at the site and their proximity to the site. In addition, the results from participants who occasionally volunteer (once a month or several times a year) may not represent the full spectrum of volunteer commitment and satisfaction.

Another limitation is that some participants commented that they had little time to complete the questionnaire due to situations set up by the researcher, their site management or their own time constraints. Based on the feedback, other participants may have had their own personal bias (e.g., fear, ego or other social factors) toward certain questions (e.g., income range, length of survey, seemingly repetitive questions) or the site itself. Personal time constraints or biases may lead some participants to skip questions, not think a question through clearly, or answer a question opposite to what they really feel (e.g., in a way that does not disparage or offend the site management or other volunteers).

### Recommendations for Future Research

The intent of this research was to establish baseline data for heritage tourism volunteers using research on other types of volunteers and tourism visitors. This special data set on heritage tourism volunteers could be further analyzed as is, and/or supplemented with new data from larger samples ( $N > 158$ ) of heritage tourism volunteers. Future volunteer samples could be selected from the same geographic area, or other geographic areas. Geographic differences might show possible differences in heritage tourism volunteer characteristics and motivations.

Looking at this data set, independent data parameters could be correlated using additional statistics. For example, to pursue the focus on older volunteers, comparisons could be done between demographic data for participants aged 50 or older (e.g., sex, marital status, income, education and occupation status) and motivation, satisfaction, importance of social contacts, place attachment, heritage interest level and other parameters.

Several subparts of the questionnaire inter-correlated well and could be used as stand-alone research tools: (1) the satisfaction model with 5 statements ( $\alpha = .90$ ); (2) the motivation model with five components and 27 statements ( $\alpha = .73 - .84$ ). This model could also be reduced to 19

or 20 statement by increasing the minimum factor loading selection parameter; (3) the heritage interest model with 5 questions ( $\alpha = .88$ ); and (4) the place attachment model with 3 statements ( $\alpha = .88$ ).

Future research could develop a new model that determines benefits of heritage tourism volunteers or test existing models that determines benefits of volunteers in general.

Future research could also study heritage tourism volunteers over time to identify motivation changes as the volunteer becomes more knowledgeable about heritage issues in general or at the site. Self-improvement motives such as having continuing learning opportunities are important to these heritage tourism volunteers. The research could assess whether the volunteer shows an increase or decrease in motivation levels at different phases of the volunteer life cycle for a specific activity: initiation/training phase, initial application and practice phase, and continuing application and practice phase. The research could also assess motivation changes when a new activity is assigned.

### Management Implications

These findings have direct implications for heritage tourism organizations dependent on the services of volunteers. Such organizations could use the 27 statement (or reduced 20 statement) motivation model to assess the motivations of potential volunteers, or groups of volunteers, and then use this information to strategically promote their organizations in ways that speak to the concerns of the volunteers they seek to recruit (Clary, et al, 1998). Management could seek out older adults and especially women in the community, who want to keep active, continue to learn, and give back to society.

A second application focuses on the ongoing nature of volunteerism. The motivation model proposes that continued participation depends on the person-situation fit, such that volunteers who serve in roles that match their own motivations will derive more satisfaction and more enjoyment from their service and be more likely to intend to continue to serve than those whose motivations are not being addressed by their activities (Clary, et al, 1998). People come with needs and motives important to them. The volunteer service tasks do or do not afford opportunities to fulfill those needs and motives. Periodic review of

these needs and motives would provide management a way to keep their volunteers involved and committed to the site.

*Satisfaction with management of volunteers.*

Participant ratings of (all but one) management practice at their site as 'important' to them shows the continued need for established volunteer management programs and coordination to ensure effective operation of heritage tourism sites. These statements received the highest ratings of importance (over 90% agreement): "Interaction with other volunteers" (social), "Management of site resources" (site-related), and "Management of volunteers" (self-interest).

This research shows that volunteers at heritage tourism sites do a variety of tasks and want to help where the need is greatest or where they can impart their experience, skills or knowledge. It is not surprising then that the participants rated "Written job descriptions for volunteers" the lowest importance (61.4%) and the highest agreement that none are provided (23.3%). Volunteer assignments tailored to the person-situation seem to best satisfy this type of volunteer. Generic job descriptions of volunteer duties can help during initial training but probably should not be rigidly enforced in application unless a volunteer performs duties that have legal or



ethical implications (e.g., keeping financial statements.) Periodic review and update of the generic job descriptions may also be a good practice. The volunteers could help in this task.

The statement "Volunteer recruiting procedures" received a high (80.9%) agreement for importance but about a 50/50 agreement whether 'just enough' (45.2%) is provided or 'not enough' is provided (40.5%). Some participants were happy with the recruiting methods while others were not.

Managers could use the study data for "proximity to site" and "driving distance to site" along with census data to establish a volunteer marketing/recruitment buffer zone near their heritage tourism site. Focusing on older populations (age 50 or older) and/or former or current educators within their geographic buffer zones could be subset focus groups to recruit.

### Conclusion Summary

The results produced several measurement tools that could be used to assess volunteers at heritage tourism sites. The results provided baseline characteristics of volunteers who work at heritage tourism sites. Many of the results match previous research conclusions and other results such as motivation factors identified similar but different conclusions. Additional analysis of the results could establish other important indicators about heritage tourism volunteers. Additional data collection from different heritage tourism volunteers will further test the reliability and validity of these instruments and results.

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## Appendix 1

*Survey instrument parameters from literature review*

## Category

## Parameters

## Activity

- activities
- entertainment
- number of activities
- recreational benefits
- volunteering is a recreational activity
- whether their participation depended on activity
- being done for its own sake; an end in itself
- just wishing to help
- meaningful action, altruistic notions
- need to render some socially useful service
- support of the cause

## Attachment

- activity attachment
- attachment to natural areas
- place attachment

## Consequence

- changes in personal actions from volunteering
- increased environmental activism
- relocating one's volunteer and recreation activities

## Constraints

- barrier - interpersonal
- barrier - intrapersonal
- barrier - structural
- compromising on activity
- compromising on activity
- level of health
- management facility
- mobility
- time

## Emotion

- emotional responses, emotions
- pleasure derived from participation

## Appendix 1 (Continued)

*Survey instrument parameters from literature review*

## Category

## Parameters

## Emotion

- pleasure of viewing

## Flow

- a condition of the soul
- state of freedom or perceived freedom of choice
- wholly into or immersed in the immediate action,
- enjoyment, loss of self-consciousness, feeling of oneness

## Goal

- a seldom achieved goal
- clear goals
- feedback
- goal achievement
- goals

## History

- a part of visits to other historic sites
- an interest in personal heritage, culture, and/or ethnicity
- experiencing authentic elements in a historic destination
- culture
- history
- the importance of the site's historic character in the decision to volunteer
- a genuine interest by the person in the project
- expectations
- having an interest in an activity or work
- interest in an activity

## Involvement

- commitment
- concentration on the task

## Appendix 1 (Continued)

*Survey instrument parameters from literature review*

## Category

## Parameters

## Involvement

frequency of participation  
 heightened experience of involvement  
 how regularly they volunteered  
 length of time that the volunteer has been participating  
 the degree to which volunteering was a high priority  
 loyalty  
 type of experience realized

## Learning

creativity  
 confidence in their ability to learn  
 curiosity  
 disinterested in engaging in learning in a formal sense  
 education  
 gaining a new perspective on things  
 information  
 intellectual  
 intellectual response  
 learned practical skills  
 learning  
 learning about a historical period or event  
 mental activity  
 new learning  
 personalized learning  
 were motivated to read and research information

## Appendix 1 (Continued)

*Survey instrument parameters from literature review*

## Category

## Parameters

## Management

- a hand in policy making
- project implementation
- project organization
- quality of the experience
- sharing and distributing information
- significant assignments
- supervising other
- their input is important

## Nature

- appreciation for natural areas
- conservation and preservation
- fascination with nature, or learning how nature works
- helping the environment
- nature

## Physical

- exercise
- need for health protection and care.
- need for suitable living arrangements and family relationships.
- physical activity
- physiological
- poor health

## Psychological

- element of control
- attitudes
- feeling of success



## Appendix 1 (Continued)

*Survey instrument parameters from literature review*

## Category

## Parameters

## Psychological

individual behaviors  
 mood  
 need for suiAppendix mental stimulation.  
 needs  
 psychological  
 reflection  
 relaxation  
 stimulus-avoidance  
 trust

## Self

a feeling that one's efforts would be meaningful  
 toward achieving some result, sense of achievement  
 a renewed confidence in themselves  
 a sense of accomplishment  
 a sense of choice  
 a sense of purpose about one's life  
 a stepping stone to further self-interests  
 brings balance into one's life  
 need for opportunity for self-expression  
 need for recognition as an individual  
 need for spiritual satisfaction, spiritual uplift  
 need to occupy their increased leisure time in  
 satisfying ways  
 personal fulfillment, self-fulfilling satisfaction  
 personal growth  
 positive affect  
 power

## Appendix 1 (Continued)

*Survey instrument parameters from literature review*

## Category

## Parameters

## Self

preferences  
 self-actualization  
 self-determination  
 self-expression  
 self-image enhancement  
 self-respect  
 self-worth and value  
 some recognition for the participant  
 status, prestige  
 values

## Setting

aesthetic setting motivation  
 built environment

## Skills

a challenging activity that requires skills  
 achievement  
 apply experience  
 apply skill  
 challenge  
 competence  
 competence/skills (education level, volunteer experience)  
 competence-master  
 demands for more significant assignments  
 knowledge about the natural environment  
 level of expertise

## Appendix 1 (Continued)

*Survey instrument parameters from literature review*

## Category

## Parameters

## Skills

literate and knowledgeable in special fields  
 perceived competence  
 responsibility  
 risks present or not  
 security and safety

## Social

affiliation and belonging  
 belonging and love  
 combating loneliness  
 demographics  
 feeling a sense of loss  
 feeling compassion for those in need  
 informal social networks  
 isolation  
 loneliness  
 multi-generational teams where they imparted their  
 experience on the younger workers  
 need for community and affiliation, community  
 need to be considered a part of the community  
 need to enjoy normal companionships  
 new friends  
 passing on the traditions  
 served as role models  
 site personnel  
 social benefits

## Appendix 1 (Continued)

*Survey instrument parameters from literature review*

## Category

## Parameters

## Social

social benefits from interaction with companions  
 social engagement  
 social environment in which that activity occurred  
 social interactions  
 social relationships  
 social support  
 socioeconomic status and situation  
 the importance of the activity to people the volunteer respects  
 the significance of sharing

## Time

coordinating time with others  
 making time for self  
 transformation of time  
 using the most of free time  
 whether their participation depended on time

## Appendix 2

**Example Cover Letter for Heritage Organizations**

Recreation, Parks and Tourism Resources    Advisor: Dr. Steve Selin

July, 2003

**Re:    HERITAGE TOURISM - VOLUNTEER RESEARCH**

Dear

Hello. I am a graduate student in Recreation, Parks & Tourism Resources at West Virginia University in Morgantown, West Virginia. My graduate thesis studies volunteers at heritage tourism sites in southwestern Pennsylvania and northern West Virginia. My research will expand upon other studies that show volunteers at recreational, historical, and cultural sites provide important contributions to the organization and gain personal benefits from their participation. This research could also provide information that helps managers improve their volunteer recruiting and retention programs.

The first part of my survey process is to gather general information about heritage tourism sites. The second part is to obtain information directly from volunteers.

Thank you for speaking with me and agreeing to participate in the study. The green booklet is for the organization to complete. Fold the survey lengthwise in-half and place and seal it in the provided **pre-addressed, postage-paid** white envelope. Please return the site survey **within two weeks of receipt or no later than (date)**.

Volunteer survey packages will be mailed directly to your volunteers after I get your list. A volunteer survey is also enclosed **for your information**. If you would like to see what type of volunteers are included in this study, look at volunteer survey question #16.

The surveys are voluntary. Your level of participation will not affect my class standing or grades.

The survey results will remain confidential. The volunteer names will remain confidential and will not be used for any other purpose. The names will not appear in the research results.

If you would like information on how to review, or to request a copy of, the study results, please check the space on Page 17 of the organization survey. The results will be available later this year. Feel free to call, write or email me if you have any questions or comments.

Sincerely,

Christine (Chris) Babka  
 Graduate Student  
 (Address)  
 (Phone, email)

## Appendix 2

**Volunteer Cover Letter**

(Included in the Heritage Tourism Volunteer Survey)

Hello Volunteer:

I am a graduate student at West Virginia University in Morgantown, West Virginia. My thesis studies volunteers at heritage tourism sites in southwestern Pennsylvania and northern West Virginia. My research will expand upon other studies that show volunteers at recreational, historical, and cultural sites provide important contributions to the organization and gain personal benefits from their participation. This research could also provide information that helps managers improve their volunteer recruiting and retention programs.

The first step of my survey process was to gather general information about heritage tourism sites. The second step is to obtain information directly from volunteers.

***You have been identified as someone who has recently volunteered at a heritage tourism site.*** I ask for your cooperation and participation. The survey should take about 15 to 20 minutes to complete. The survey is voluntary. You do not have to answer every question but I hope that you will. Your level of participation will not affect my class standing or grades.

Please place the completed survey in the enclosed envelope and return the envelope to the survey coordinator at your location or mail the envelope directly (add postage). Please return the survey **EVEN IF YOU DECIDE NOT TO COMPLETE IT OR YOU ONLY COMPLETE SOME SECTIONS.**

If you would like information on how to review or obtain the study results, complete the separate note card and insert it in the same envelope with the completed survey or mail it separate from the survey (add postage). The individual volunteer survey results will remain confidential and separate from the request cards.

A small thank-you gift is also attached.

I look forward to your responses.

Christine (Chris) Babka  
Graduate Student  
Recreation, Parks and Tourism Resources  
Advisor: Dr. Steve Selin

## Appendix 3

**HERITAGE ORGANIZATIONS SURVEY** (Booklet format-cover page edited)

West Virginia University Recreation Research Project 2003

*Please print all responses clearly*

*Return the survey whether you complete it all or part.*

**THANK YOU FOR YOUR PARTICIPATION!**

Please return all surveys **WITHIN TWO WEEKS** in the provided envelope.

Volunteer Survey, (address)

Page 1

**1. Please provide some general information about your organization.**

(1) **Organization Name** (e.g., Washington Historical Society)

---

(2) **Organization Street / Physical Address**

---

(3) **Organization Mailing Address** (if different than physical address)

---

(4) **City**

---

(5) **State** (2 digit abbreviation)

---

(6) **Zip Code** (5 digit minimum)

---

(7) **Administrative Contact Person** (or volunteer coordinator)

---

(8) **Daytime Telephone** (3 digit Area code + 7 digit local number)

---

(9) **Fax** (3 digit Area code + 7 digit local number)

---

(10) **E-mail** (for the contact person or general email for the organization).

---

**2. What are the type and number of heritage tourism sites managed by your organization?**

	(Check all that apply)	(How many?)
(1) <b>Historic building</b>	_____	# _____
(2) <b>Historic landmark/monument</b>	_____	# _____
(3) <b>Historic battlefield</b>	_____	# _____
(4) <b>Historic park</b>	_____	# _____
(5) <b>History museum</b>	_____	# _____
(6) <b>Scenic/Natural landscape</b>	_____	# _____
(7) <b>Cultural museum</b>	_____	# _____
(8) <b>Cultural landscape</b>	_____	# _____
(9) <b>Other</b> (describe) _____		# _____

**Overall Business type for the Organization**

(10) **Privately owned/operated** \_\_\_\_\_

(11) **Publicly owned/operated** \_\_\_\_\_

(12) **Non-Profit** \_\_\_\_\_

(13) **Tax status:** Corporation ☐ Partnership ☐ Individual ☐ 501(c)3 ☐  
 Government ☐ Other (describe) \_\_\_\_\_



## Appendix 3

Page 3

- 4. Indicate how many your organization has on average each year.  
Provide individual or total numbers if more than one site, or both.**

	<b>Visitors received/year</b>	<b>Days operated/year</b>
(1) <b>Historic building</b>	# _____	# _____
(2) <b>Historic landmark/monument</b>	# _____	# _____
(3) <b>Historic battlefield</b>	# _____	# _____
(4) <b>Historic park</b>	# _____	# _____
(5) <b>History museum</b>	# _____	# _____
(6) <b>Scenic/Natural landscape</b>	# _____	# _____
(7) <b>Cultural museum</b>	# _____	# _____
(8) <b>Cultural landscape</b>	# _____	# _____
(9) <b>Other ( _____ )</b>	# _____	# _____

**OR**

(10) <b>Total Overall</b>	# _____	# _____
---------------------------	---------	---------

Other notes \_\_\_\_\_

---

**5. Please identify the type and number of employees at this organization within the last two years. (by type of site or totals)**

Definitions:

- Ø A salaried full-time employee receives an annual or hourly salary and works 40 hours per week. Employee may or may not receive full employee benefits. Employee may be permanent, contract or consultant.
- Ø A salaried part-time employee receives an annual or hourly salary and works up to and equal to 32 hours per week. Employee may receive full, minimal or no employee benefits. Employee may be permanent, contract or consultant.
- Ø A compensated volunteer receives out-of-pocket expenses for transportation and meals but no salary or employee benefits.
- Ø A non-compensated volunteer receives no salary, employee benefits, or expenses.

**(1) Historic building**

(Check all that apply)

(How many?)

- |                                 |        |         |
|---------------------------------|--------|---------|
| (a) Salaried Full-time Employee | _____; | # _____ |
| (b) Salaried Part-time Employee | _____; | # _____ |
| (c) Compensated Volunteer       | _____; | # _____ |
| (d) Non-compensated Volunteer   | _____; | # _____ |

**5. (Continued)****(2) Historic landmark/monument**

(Check all that apply)

(How many?)

- (a) Salaried Full-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (b) Salaried Part-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (c) Compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_
- (d) Non-compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_

**(3) Historic battlefield**

(Check all that apply)

(How many?)

- (a) Salaried Full-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (b) Salaried Part-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (c) Compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_
- (d) Non-compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_

**(4) Historic park**

(Check all that apply)

(How many?)

- (a) Salaried Full-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (b) Salaried Part-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (c) Compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_
- (d) Non-compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_

**5. (Continued)****(5) History museum**

(Check all that apply) (How many?)

- (a) Salaried Full-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (b) Salaried Part-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (c) Compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_
- (d) Non-compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_

**(6) Scenic/Natural landscape**

(Check all that apply) (How many?)

- (a) Salaried Full-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (b) Salaried Part-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (c) Compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_
- (d) Non-compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_

**(7) Cultural museum**

(Check all that apply) (How many?)

- (a) Salaried Full-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (b) Salaried Part-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (c) Compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_
- (d) Non-compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_

**5. (Continued)****(8) Cultural landscape**

(Check all that apply) (How many?)

- (a) Salaried Full-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (b) Salaried Part-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (c) Compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_
- (d) Non-compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_

**(9) Other (\_\_\_\_\_)**

(Check all that apply) (How many?)

- (a) Salaried Full-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (b) Salaried Part-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (c) Compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_
- (d) Non-compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_

**(10) Total number of employees and volunteers if more than one site**

(Check all that apply) (How many?)

- (a) Salaried Full-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (b) Salaried Part-time Employee \_\_\_\_\_; #\_\_\_\_\_
- (c) Compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_
- (d) Non-compensated Volunteer \_\_\_\_\_; #\_\_\_\_\_

**6. Please estimate the age groups and numbers of the persons who volunteered for your organization sites within the last two years.**

**(1) Historic building**

(Check all that apply) (How many?)

- |     |                               |        |        |
|-----|-------------------------------|--------|--------|
| (a) | Persons up to 29 years of age | _____; | #_____ |
| (b) | Adults aged 30 to 50 years    | _____; | #_____ |
| (c) | Adults aged 51 to 65 years    | _____; | #_____ |
| (d) | Adults aged 66 to 80 years    | _____; | #_____ |
| (e) | Adults aged 81 and over       | _____; | #_____ |

**(2) Historic landmark/monument**

(Check all that apply) (How many?)

- |     |                               |        |        |
|-----|-------------------------------|--------|--------|
| (a) | Persons up to 29 years of age | _____; | #_____ |
| (b) | Adults aged 30 to 50 years    | _____; | #_____ |
| (c) | Adults aged 51 to 65 years    | _____; | #_____ |
| (d) | Adults aged 66 to 80 years    | _____; | #_____ |
| (e) | Adults aged 81 and over       | _____; | #_____ |

**(3) Historic battlefield**

(Check all that apply) (How many?)

- |     |                               |        |        |
|-----|-------------------------------|--------|--------|
| (a) | Persons up to 29 years of age | _____; | #_____ |
| (b) | Adults aged 30 to 50 years    | _____; | #_____ |
| (c) | Adults aged 51 to 65 years    | _____; | #_____ |
| (d) | Adults aged 66 to 80 years    | _____; | #_____ |
| (e) | Adults aged 81 and over       | _____; | #_____ |

## Appendix 3

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**6. (Continued)****(4) Historic park**

(Check all that apply) (How many?)

- (a) Persons up to 29 years of age \_\_\_\_\_; #\_\_\_\_\_
- (b) Adults aged 30 to 50 years \_\_\_\_\_; #\_\_\_\_\_
- (c) Adults aged 51 to 65 years \_\_\_\_\_; #\_\_\_\_\_
- (d) Adults aged 66 to 80 years \_\_\_\_\_; #\_\_\_\_\_
- (e) Adults aged 81 and over \_\_\_\_\_; #\_\_\_\_\_

**(5) History museum**

(Check all that apply) (How many?)

- (a) Persons up to 29 years of age \_\_\_\_\_; #\_\_\_\_\_
- (b) Adults aged 30 to 50 years \_\_\_\_\_; #\_\_\_\_\_
- (c) Adults aged 51 to 65 years \_\_\_\_\_; #\_\_\_\_\_
- (d) Adults aged 66 to 80 years \_\_\_\_\_; #\_\_\_\_\_
- (e) Adults aged 81 and over \_\_\_\_\_; #\_\_\_\_\_

**(6) Scenic/Natural landscape**

(Check all that apply) (How many?)

- (a) Persons up to 29 years of age \_\_\_\_\_; #\_\_\_\_\_
- (b) Adults aged 30 to 50 years \_\_\_\_\_; #\_\_\_\_\_
- (c) Adults aged 51 to 65 years \_\_\_\_\_; #\_\_\_\_\_
- (d) Adults aged 66 to 80 years \_\_\_\_\_; #\_\_\_\_\_
- (e) Adults aged 81 and over \_\_\_\_\_; #\_\_\_\_\_

**6. (Continued)****(7) Cultural museum**

(Check all that apply) (How many?)

- (a) Persons up to 29 years of age \_\_\_\_\_; #\_\_\_\_\_
- (b) Adults aged 30 to 50 years \_\_\_\_\_; #\_\_\_\_\_
- (c) Adults aged 51 to 65 years \_\_\_\_\_; #\_\_\_\_\_
- (d) Adults aged 66 to 80 years \_\_\_\_\_; #\_\_\_\_\_
- (e) Adults aged 81 and over \_\_\_\_\_; #\_\_\_\_\_

**(8) Cultural landscape**

(Check all that apply) (How many?)

- (a) Persons up to 29 years of age \_\_\_\_\_; #\_\_\_\_\_
- (b) Adults aged 30 to 50 years \_\_\_\_\_; #\_\_\_\_\_
- (c) Adults aged 51 to 65 years \_\_\_\_\_; #\_\_\_\_\_
- (d) Adults aged 66 to 80 years \_\_\_\_\_; #\_\_\_\_\_
- (e) Adults aged 81 and over \_\_\_\_\_; #\_\_\_\_\_

**(9) Other (\_\_\_\_\_)**

(Check all that apply) (How many?)

- (a) Persons up to 29 years of age \_\_\_\_\_; #\_\_\_\_\_
- (b) Adults aged 30 to 50 years \_\_\_\_\_; #\_\_\_\_\_
- (c) Adults aged 51 to 65 years \_\_\_\_\_; #\_\_\_\_\_
- (d) Adults aged 66 to 80 years \_\_\_\_\_; #\_\_\_\_\_
- (e) Adults aged 81 and over \_\_\_\_\_; #\_\_\_\_\_



**6. (Continued)****(10) Total number of employees and volunteers if more than one site**

(Check all that apply) (How many?)

- (a) Persons up to 29 years of age \_\_\_\_\_; #\_\_\_\_\_
- (b) Adults aged 30 to 50 years \_\_\_\_\_; #\_\_\_\_\_
- (c) Adults aged 51 to 65 years \_\_\_\_\_; #\_\_\_\_\_
- (d) Adults aged 66 to 80 years \_\_\_\_\_; #\_\_\_\_\_
- (e) Adults aged 81 and over \_\_\_\_\_; #\_\_\_\_\_

**7. Identify the months your facilities are open for business.**

(Check all that apply)

(1) **Historic building** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_ June \_\_\_\_  
 July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(2) **Historic landmark/monument** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_  
 May \_\_\_\_ June \_\_\_\_ July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(3) **Historic battlefield** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_  
 June \_\_\_\_ July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

## Appendix 3

Page 12

**7. (Continued)**

(4) **Historic park** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_ June \_\_\_\_  
 July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(5) **History museum** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_ June \_\_\_\_  
 July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(6) **Scenic/Natural landscape** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_  
 June \_\_\_\_ July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(7) **Cultural museum** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_ June \_\_\_\_  
 July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(8) **Cultural landscape** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_ June \_\_\_\_  
 July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(9) **Other** (\_\_\_\_\_)

Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_ June \_\_\_\_ July \_\_\_\_ Aug \_\_\_\_  
 Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(10) **Total All sites** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_ June \_\_\_\_  
 July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

**8. Identify the months volunteer employees work at your facility.**

(Check all that apply)

(1) **Historic building** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_ June \_\_\_\_  
 July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(2) **Historic landmark/monument** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_  
 May \_\_\_\_ June \_\_\_\_ July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(3) **Historic battlefield** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_ June \_\_\_\_  
 July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(4) **Historic park** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_ June \_\_\_\_  
 July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(5) **History museum** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_ June \_\_\_\_  
 July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(6) **Scenic/Natural landscape** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_  
 May \_\_\_\_ June \_\_\_\_ July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

**8. (Continued)**

(7) **Cultural museum** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_ June \_\_\_\_  
 July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(8) **Cultural landscape** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_ June \_\_\_\_  
 July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(9) **Other** (\_\_\_\_\_)

Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_ June \_\_\_\_ July \_\_\_\_ Aug \_\_\_\_  
 Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

(10) **Total All sites** Jan \_\_\_\_ Feb \_\_\_\_ Mar \_\_\_\_ Apr \_\_\_\_ May \_\_\_\_ June \_\_\_\_  
 July \_\_\_\_ Aug \_\_\_\_ Sept \_\_\_\_ Oct \_\_\_\_ Nov \_\_\_\_ Dec \_\_\_\_

**9. Identify which programs your organization has implemented for managing volunteers at all sites.**

(Check all that apply)

- (1) Involvement of paid employees in program development \_\_\_\_\_
- (2) Volunteer job description \_\_\_\_\_
- (3) Recruiting/Hiring \_\_\_\_\_
- (4) Benefits/Compensation \_\_\_\_\_
- (5) Orientation/Training in task assignments \_\_\_\_\_
- (6) Orientation/Training in policies and procedures \_\_\_\_\_
- (7) Performance Evaluation \_\_\_\_\_
- (8) Reward System \_\_\_\_\_
- (9) Recordkeeping \_\_\_\_\_
- (10) Firing Procedures \_\_\_\_\_
- (11) Internal Review of Program \_\_\_\_\_
- (12) Survey of volunteers \_\_\_\_\_

Note: At a minimum, a survey should seek to identify those aspects of the job that [volunteer] employees most enjoy performing, those that they dislike, and those for which they lack sufficient time or expertise. (Herman, 1994, p. 288)

**9. If you do have different procedures at different sites or other programs for volunteers at this organization that are not listed, please describe here.** (edited)

---

ALL PERSONAL INFORMATION WILL BE MAINTAINED CONFIDENTIAL.  
PARTICIPATION IN THE STUDY IS VOLUNTARY.

**Feedback Option**

IF THE ORGANIZATION WOULD LIKE INFORMATION ABOUT HOW TO  
REVIEW OR OBTAIN THE FINAL STUDY RESULTS,  
PLEASE CHECK HERE. \_\_\_\_\_

Feel free to add any other comments here. (edited)

---

(Last page)

PLEASE SOLICIT RESPONSES FROM ADULTS AGE 18 OR OLDER WHO  
HAVE VOLUNTEERED AT YOUR HERITAGE ORGANIZATION OR SITE  
BETWEEN JANUARY 1, 2001 TO PRESENT. USE THE VOLUNTEER SURVEY  
FORM/PACKETS.

RETURN ALL COMPLETED SURVEYS (ORGANIZATION AND VOLUNTEER)  
IN THE LARGER ENVELOPE PROVIDED WITHIN TWO WEEKS OF RECEIPT

(Back outside cover)

THANK YOU FOR YOUR PARTICIPATION!

Please return all surveys WITHIN TWO WEEKS in the provided envelope.

**Volunteer Survey, (address)**

**O:2/19/03; R2: 6/27/03**

## Appendix 4

**HERITAGE TOURISM VOLUNTEER SURVEY** (Booklet format-cover page edited)

West Virginia University Recreation Research Project 2003

To comply with University research rules, this survey is meant only for adult volunteers aged 18 or older.

Please return the survey if you complete it all or part.

**THANK YOU FOR YOUR PARTICIPATION!**

Please fold this survey lengthwise in-half and place in the provided envelope. Return the sealed envelope to your survey coordinator within two weeks.

Volunteer Survey, (address)

(Volunteer cover letter)

Page 1

*Heritage Tourism*

In the tourism industry, the term heritage has come to mean landscapes, natural history, buildings, artifacts, and cultural traditions that are either literally or metaphorically passed on from one generation to the other, but among these things which can be portrayed by promotion as tourism products. Heritage tourism is about searching for something that links the past and the present. It is integrally tied to nostalgia (Confer & Kerstetter, 2000).

*Volunteer*

- Ø A compensated volunteer receives out-of-pocket expenses for transportation and meals but no salary or employee benefits.
- Ø A non-compensated volunteer receives no salary, employee benefits, or expenses.

**Please print all responses clearly.**

1. **At what age were you when you first began to volunteer for any cause?**  
\_\_\_\_\_
2. **How many years collectively have you actively volunteered so far for any cause?** (*Check the closest number or range*)  
I just began to volunteer within the last year ☐ 1 year ☐ 2-4 years ☐  
5-10 years ☐ 11-20 years ☐ 21-30 years ☐ greater than 30 years ☐
3. **Identify the heritage tourism site in southwestern Pennsylvania or northern West Virginia where you volunteer at the time of this survey.** *This will be the site that most of the survey questions will apply.*

Name\_\_\_\_\_

Location\_\_\_\_\_

- 4. Have you volunteered for other heritage sites in this region between January 1, 2001 and today?**

Yes ☐ No ☐

**If yes, how many? (Number)** \_\_\_\_\_

- 5. Have you ever or do you now volunteer for other causes in this region between January 1, 2001 and today?**

Yes ☐ No ☐

**If yes, what other type of volunteer activities have you/do you participate(d) in? (Check all that apply)**

Church ☐ Hospital ☐ School / After school programs ☐ Library ☐

Community sports teams ☐ Eldercare/Nursing Home ☐

Other Community activities ☐ (e.g., gardening clubs, local boards, theatre)  
(Describe)

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- 6. How many total hours each week (on average) do you volunteer for all causes? (Check one)**

Less than 1 hour ☐ 1-4 hours ☐ 5-9 hours ☐

10-14 hours ☐ 15-19 hours ☐ 20 or more hours ☐

- 7. How long have you volunteered at this specific heritage site? (Check one)**

I just began to volunteer within the last year ☐

1 year ☐ 2-4 years ☐ 5-10 years ☐

11-20 years ☐ 21-30 years ☐ more than 30 years ☐



## Appendix 4

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- 8. How would you best describe how often you volunteer at this site? (Check one)**  
 One day/week ☐ Several days/week ☐ One day/month ☐  
 Several days/month ☐ One day/year ☐ Several days/year ☐.
- 9. How much time do you typically spend on each volunteer visit to this site? (Check one)** Less than 4 hours/day ☐ 4-8 hours /day ☐
- 10. Do you live in the general area near this heritage site? Yes ☐ No ☐**  
**If yes, how long have you lived in this area? (Check one)**  
 Less than a year ☐ 1-5 years ☐ 5-10 years ☐  
 10-20 years ☐ 20-40 years ☐ my whole life ☐
- 11. How long do you plan to stay in this area? (Check one)**  
 Less than a year ☐ 1-5 years ☐ 5-10 years ☐ indefinitely ☐
- 12. How many relatives typically volunteer with you at this site? (Circle one answer)**  
 0      1      2      3      more than 3
- 13. Which one relative most often volunteers with you at this site? (Check one)**  
 Spouse ☐ Adult child age 18 or older ☐ Sibling ☐  
 Parent ☐ Child under 18 ☐ None ☐
- 14. How many friends, that were your friends prior to volunteering at this site, typically volunteer at the same time you do? (Circle one answer)**  
 0      1      2      3      more than 3

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**15. How did you learn about volunteering at this site? (Check all that apply)**Word of mouth (friend, family member, acquaintance) ☐ Previous visit ☐Site brochure ☐ Newspaper ☐ Site website ☐ Driving past ☐Volunteer organization at site ☐ Membership organization at site ☐

Other (Fill-in) \_\_\_\_\_

**16. What are your volunteer duties at this site? (Check all that apply)**Office/Shipping clerical work ☐ Management responsibilities ☐Landscaping maintenance ☐ Natural resource management ☐Research ☐ Tour Guide ☐ Structure/Building Maintenance ☐Library maintenance/cataloging ☐ Site interpretation/demonstrator ☐ VisitorCenter Desk ☐ Exhibit/Collections management ☐

Other (Fill-in) \_\_\_\_\_

**17. How much do the following characterize your volunteer efforts for this site? (Mark an "X" or circle one answer in each row)**

Volunteer on a regular basis....	Very Much	Quite a bit	Mod- erately	A little bit	Not very
<b>Volunteer depending on time</b>	Very Much	Quite a bit	Mod- erately	A little bit	Not very
Volunteer depending on activity	Very Much	Quite a bit	Mod- erately	A little bit	Not very
<b>Volunteering is a high priority for me.....</b>	Very Much	Quite a bit	Mod- erately	A little bit	Not very

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**18. How satisfied are you with your volunteer experiences at this site? (check one)**

Very Satisfied ☐ Somewhat Satisfied ☐ Neutral ☐

Somewhat Dissatisfied ☐ Very Dissatisfied ☐

**19. How much do the following characterize your activities for this site? (Mark an "X" or circle one answer in each row)**

How important is <u>available transportation</u> to whether you volunteer?.....	Very Important	Important	Neutral	Somewhat Important	Not Important
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<b>How important is <u>travel time</u> as a consideration for how often you volunteer?.....</b>	Very Important	Important	Neutral	Somewhat Important	Not Important
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How important is <u>your health</u> to whether you volunteer?.....	Very Important	Important	Neutral	Somewhat Important	Not Important
--	----------------	-----------	---------	--------------------	---------------

<b>How important is the <u>overall site itself</u> to your decision to volunteer?.....</b>	Very Important	Important	Neutral	Somewhat Important	Not Important
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How important are the <u>site historic structures</u> to your decision to volunteer?.....	Very Important	Important	Neutral	Somewhat Important	Not Important
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<b>How important is the <u>site landscape and natural resources</u> to your decision to volunteer?.....</b>	Very Important	Important	Neutral	Somewhat Important	Not Important
---	----------------	-----------	---------	--------------------	---------------

**20. How important are the social relationships you have made at the site to your decision to remain a volunteer at this site?**

Very Important ☐ Important ☐ Neutral ☐ Somewhat Important ☐

Not Important ☐ Have not made any ☐

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**21. How much time does it take you to travel from your residence to the site?**Less than ½ Hour ☐ 1 Hour ☐ 1-2 hours ☐ More that 2 hours ☐**22. How far do you travel from your home to the site where you volunteer?**Adjacent or a few yards ☐ Under 0.5 mile ☐ 1-5 miles ☐6-20 miles ☐ 21-50 miles ☐ Other miles (*Fill-in*) \_\_\_\_\_**23. Describe your overall level of physical health at this time.**Excellent ☐ Good ☐ Fair ☐ Poor ☐**24. What are your future plans regarding volunteering at this site?**Volunteer more ☐ Volunteer the same ☐ Don't know ☐Reduce level of volunteering ☐ Stop volunteering ☐**25. Indicate how much you agree with these statements about your general satisfaction from doing this volunteer work.***(Mark an "X" or circle one answer in each row)*

I enjoyed my volunteer experience...	Strongly Agree	Neutral	Disagree	Strongly Disagree
<b>My volunteer experience was personally fulfilling.....</b>	Strongly Agree	Neutral	Disagree	Strongly Disagree
My volunteer experience was worthwhile.....	Strongly Agree	Neutral	Disagree	Strongly Disagree
<b>I feel that my contribution has been very important to this heritage program.....</b>	Strongly Agree	Neutral	Disagree	Strongly Disagree
I accomplished some 'good' through my work.....	Strongly Agree	Neutral	Disagree	Strongly Disagree

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**26. Indicate how much you agree with these statements about how this volunteer work affects your life.**

*(Mark an "X" or circle one answer in each row)*

<b>I take vacations in heritage areas..</b>	Strongly Agree	Neutral	Disagree	Strongly Disagree
I contribute money to heritage organizations.....	Strongly Agree	Neutral	Disagree	Strongly Disagree
<b>I seek information about heritage areas.....</b>	Strongly Agree	Neutral	Disagree	Strongly Disagree
I explore new heritage areas nearby	Strongly Agree	Neutral	Disagree	Strongly Disagree
<b>I protest when heritage sites are threatened.....</b>	Strongly Agree	Neutral	Disagree	Strongly Disagree
I tell my friends about heritage issues.....	Strongly Agree	Neutral	Disagree	Strongly Disagree
<b>I write letters or articles about heritage issues.....</b>	Strongly Agree	Neutral	Disagree	Strongly Disagree
I have an interest in protecting heritage areas nationally.....	Strongly Agree	Neutral	Disagree	Strongly Disagree

**27. Describe why you originally volunteered at this site.**

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**28. How much do the following characterize your activities for this organization/site now compared to when you started?**

(Mark an "X" or circle one answer in each row)

My level of <i>interest</i> in history, culture, or heritage topics <u>in general</u>	Very great Improve ment	Great Improve ment	Medium Improve ment	Some Improve ment	No change
My level of <i>interest</i> in <u>local</u> history, culture, heritage topics <u>in particular</u> .....	Very great Improve ment	Great Improve ment	Medium Improve ment	Some Improve ment	No change
My level of <i>participation</i> in learning opportunities about history, culture, or heritage topics <u>in general</u>	Very great Improve ment	Great Improve ment	Medium Improve ment	Some Improve ment	No change
My level of <i>participation</i> in learning opportunities about <u>local</u> history, culture, or heritage topics <u>in particular</u> .....	Very great Improve ment	Great Improve ment	Medium Improve ment	Some Improve ment	No change
My level of <i>understanding</i> of the history/ culture/ heritage <u>at this site</u> .....	Very great Improve ment	Great Improve ment	Medium Improve ment	Some Improve ment	No change

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**29. Please indicate how much you agree with each of these statements about your volunteering experience at this heritage tourism site/organization.**

*(Mark an "X" or circle one answer in each row)*

<b>My friends volunteer.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
People I'm close to want me to volunteer.....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>Volunteering makes me feel important.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I am genuinely concerned about the particular group I am serving	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>By volunteering I feel less lonely</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I can learn more about the cause for which I am working.....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>Volunteering increases my self- esteem.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Volunteering allows me to gain a new perspective on things.....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>Others with whom I am close place a high value on community service.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Volunteering lets me learn things through direct, hands on experience / Get to learn new things.....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>I feel it is important to help others.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree

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**29. (Continued)** (Mark an "X" or circle one answer in each row)

<b>Volunteering helps me work through by own personal problems.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I can do something for a cause that is important to me.....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>Volunteering is an important activity to the people I know best</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I can learn how to deal with a variety of people.....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>Volunteering makes me feel needed.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Volunteering makes me feel better about myself.....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>Volunteering experience will look good on my resume.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Volunteering is a way to make new friends / Increases my social contacts .....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>I can explore my own strengths</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree



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**29. (Continued)** (Mark an "X" or circle one answer in each row)

XXXXXXXXXXXXXXXXXXXXXXXXXXXX	XXXXXX	XXXXX	XXXXX	XXXXX	XXXXX
<b>This heritage area has become one of my favorite places/ Would miss my heritage site if I moved ..</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Improves my quality of life.....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>I am doing something for future generations.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Improves my community/ I feel a civic responsibility/Pride .....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>Seeing familiar faces.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Get to do something physical or get physical exercise.....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>Seeing improvements to the environment/ Help to restore the environment.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Feel I am doing something useful or being productive/ I have a sense of purpose and self-worth.....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>Discouraged about loss or destruction of heritage sites even those that are far away.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree

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**29. (Continued)** (Mark an "X" or circle one answer in each row)

<b>Can work at my own pace.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Work with a good leader.....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>Make decisions about projects...</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Have fun .....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>Enhances my skills.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Get to pursue a hobby or personal interest.....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>Experience solitude or a chance to reflect.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Activity is a stress reliever.....	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>Commune with nature or observe nature/ Chance to be outdoors in fresh air .....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Seeing improvements to the site/ Help to restore the site	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<b>Consider volunteer activities as part of my recreation.....</b>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree

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**30. Describe any other benefits you get from volunteering at this site. (edited)**


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**31. Describe anything that helped or encouraged you to originally decide to volunteer at this site, such as actions by site management, friends or family or personal issues. (edited)**


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## Appendix 4

32. Describe anything that hindered or discouraged you from originally deciding to volunteer at this site, such as actions by site management, friends or family or personal issues. (Personal examples: Lack of time, Lack of money, Personal health, No companion, Inadequate transportation.) (edited)

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33. How would you rate the following management practices at this site or organization? (Mark an "X" or circle one answer in each row and each group)

Group 1 Importance to you      Group 2 Amount provided

<b>Supervisory attention.....</b>	Is Important	Not Important	Too Much	Just Enough	Not Enough	Not Provided
Training / instruction to do my volunteer work.....	Is Important	Not Important	Too Much	Just Enough	Not Enough	Not Provided
<b>Volunteers are asked about their interests at the site.....</b>	Is Important	Not Important	Too Much	Just Enough	Not Enough	Not Provided
Volunteers are provided opportunities to pursue their interests at the site...	Is Important	Not Important	Too Much	Just Enough	Not Enough	Not Provided
<b>Positive feedback about or recognition for my volunteer work.....</b>	Is Important	Not Important	Too Much	Just Enough	Not Enough	Not Provided
Interaction with other volunteers.....	Is Important	Not Important	Too Much	Just Enough	Not Enough	Not Provided
<b>Written job descriptions for volunteers.....</b>	Is Important	Not Important	Too Much	Just Enough	Not Enough	Not Provided
Volunteer recruiting procedures.....	Is Important	Not Important	Too Much	Just Enough	Not Enough	Not Provided
<b>Interaction with paid staff.....</b>	Is Important	Not Important	Too Much	Just Enough	Not Enough	Not Provided
Management of site resources.....	Is Important	Not Important	Too Much	Just Enough	Not Enough	Not Provided
<b>Management of staff.....</b>	Is Important	Not Important	Too Much	Just Enough	Not Enough	Not Provided
Management of volunteers.....	Is Important	Not Important	Too Much	Just Enough	Not Enough	Not Provided
<b>Volunteer records management.....</b>	Is Important	Not Important	Too Much	Just Enough	Not Enough	Not Provided

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- 34. Please feel free to add any other comments about your volunteer experience at this heritage site or organization. (*Please print.*) (edited)**
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**For the next set of general questions please check one answer for each question.**

1. **My gender is:** Female ☐ Male ☐
2. **My household includes how many persons including yourself? (*Circle one*)**  
1                      2                      3                      4                      greater than 4
3. **I am a native-born U.S. Citizen.**  
Yes ☐ No ☐ Decline to answer ☐
4. **My marital status is.** Married ☐ Separated ☐ Widowed ☐  
Divorced ☐ Never Married ☐ Living with another ☐  
Decline to answer ☐
5. **My age group is.** 18-29 ☐ 30-39 ☐ 40-49 ☐ 50-59 ☐  
60-69 ☐ 70-79 ☐ 80 + ☐ Decline to answer ☐
6. **My last completed education level is.** K-7 ☐ 7-9 ☐ 10-12 ☐  
1-2 year post-high school ☐ 4-yr college ☐ Advanced degrees ☐  
Decline to answer ☐
7. **My state of residence is:** PA ☐ WV ☐ Other \_\_\_\_\_
8. **My “occupation work for pay” status is:**  
Employed full-time ☐ Employed part time ☐ Retired ☐  
Taking a sabbatical from work ☐ Involuntarily unemployed ☐  
Voluntarily unemployed ☐ Disabled ☐ Decline to answer ☐.

**9. My last or current paid/unpaid occupation category or career focus:**

(*no titles*) (e.g., accountant, engineer, nurse, retail associate, sales representative, teacher, homemaker)

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**10. I am compensated for my volunteer work at this heritage site with.**

(*Check all that apply*)

No wage ☐ Part time wage ☐ Full-time wage ☐ Expenses only ☐  
 (*Expenses can be mileage, meals, or uniforms*)

Other compensation \_\_\_\_\_

**11. Do you consider yourself: (*Check one*)**

White / Caucasian  
 Black / African American  
 Asian  
 Hispanic  
 Native American Indian or Alaskan native  
 Mixed racial background  
 Other race  
 Decline to answer


**12. What was your 2002 annual gross income before taxes: (*Check one*)**

Less than \$10,000	
\$10-20,000	
\$21-40,000	
\$41-60,000	
\$61-80,000	
\$81-100,000	
Over \$100,000	
Decline to answer	

**13. Other comments about this survey. (*Please print*) (edited)**


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(Back outside cover) (edited)

THANK YOU FOR YOUR PARTICIPATION!

Please fold this survey lengthwise in-half and place in the provided envelope. Return the sealed envelope to your survey coordinator within two weeks.

Volunteer Survey, (address)

IRB 3/11/03, F 6/26/03