



WISCONSIN DEPARTMENT OF TOURISM
RESEARCH

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**2002-2003
Four Season In-Market
Leisure Traveler Survey**

FALL SEGMENT

EXECUTIVE SUMMARY

**APPLICATIONS
AND
KEY FINDINGS**

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**2002-2003
Four Season In-Market
Leisure Traveler Survey**

Fall Segment

Background:

The Wisconsin Department of Tourism began the first in a series of four seasonal surveys during September and October 2002. The purpose of the study is to evaluate a range of marketing topics from visitor attitudes, satisfaction levels and traveler activities, to media recommendations, spending patterns, travel group composition and demographics. The overall study will report on each season beginning in the fall of 2002 through summer 2003.

The survey areas for the fall segment were conducted in the Manitowoc/Two Rivers/Sheboygan County area (the Sheboygan Area), the Vilas/Oneida County region, the Sawyer County area which includes interviews in Washburn and Bayfield counties (the Sawyer Area) and the Iowa/Green County area, including the corridor from Spring Green and Monroe to New Glarus and Mineral Point. Within each area, approximately 325 travelers were interviewed, providing a total sample of 1300 completed surveys for the fall segment of the study.

Those interviewed were qualified as being on a leisure trip or enjoying leisure activities while on business-related travel. Travelers were interviewed across the widest location spectrum possible, which included downtown shopping areas, outdoor recreation locations, attractions and events. Travelers were also interviewed during daytime and evening hours on both weekends and weekdays to provide a good cross section of day trip and overnight visitors.

The following summary is structured to provide the composite findings for all of the four areas combined. While the data show information pertinent to the areas studied, in many cases, the information is applicable to many areas of the state. This is particularly true for areas within the state with similar leisure travel infrastructure and attributes.

Four different areas of the state will be studied each season and a report will be produced for each seasonal segment. A four season comparative summary will be produced after the summer 2003 segment has been completed.

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EXECUTIVE SUMMARY

Combined Area Key Findings

Trip Characteristics:

- The majority (93.7%) of the 1,306 travelers were on a leisure trip with the remainder noting they were on a combination business and leisure trip.
- On average, travelers have taken nine trips in Wisconsin during the past three years. However, first time travelers during the three-year period and infrequent travelers, those who have taken two or fewer Wisconsin vacations during the past three years, comprise 15.8% of those interviewed.
- It can be suggested that the first time and infrequent travelers are the most likely to be motivated to travel in Wisconsin due to the awareness generated through marketing and promotional activities.
- Nearly two-thirds (62.6%) of fall visitors were short-term planners. Travelers indicated that the month or months they began to plan their trip most frequently occurred during August, September or October.
- Overall, the most frequently mentioned reasons for choosing the fall season as the time of year to travel were “special public events” such as festivals or concerts noted 23.1% of the time followed by fall color cited 21.6% of the time.
- When asked to state reasons for choosing their specific destination, the participants first reasons were noted separately as “top of mind” responses. One in five (19.3%) cited friends and relatives live nearby as the “first reason”. Attending a public festival or event was mentioned by 17.7%.
- When combining all of the various reasons respondents gave for choosing their destination, the top three reasons mentioned most often are attending public festivals/events (29.1%), friends and relative live nearby (26.6%), and fall color, noted 24.3% of the time. This indicates that while fall color was not as frequently noted as a first reason, it was an extremely important secondary reason for choosing their destination.
- In addition to the top three reasons mentioned above, natural beauty (15.3%), outdoor activities (14.6%) and personal events such as weddings or reunions were noted 14.4% of the time. Shopping (11.6%) general sightseeing (10.5%) and attractions (10.2%) were the next most frequently cited reasons.

Trip Planning Sources:

- On average, respondents noted two sources of information they used in planning their trip. The most frequently noted information sources used to plan the trip were friends and relatives, cited 39% of the time followed by local and state Internet sites, mentioned 18.4% and 12.9% respectively.
- Magazine articles (13.2%) and newspaper ads (11.1%) were ahead of newspaper articles (10.9%) and “other” Internet sites (10.3%).
- AAA resources (6.7%) state (5.5%) and local publications (5.4%) were also noted. Among broadcast media (often considered less useful for planning than awareness generation) TV was mentioned 5.5% of the time, TV travel programs (4.4%) and radio (4.1%).
- Hotel brochure racks (4.9%) and state and local travel information centers were mentioned 4.8% and 4.3% of the time respectively.
- For those that mentioned the “most useful” source of information to plan their trip, friends and family was the most important noted 22.8% of the time. Other sources mentioned include local Internet sites, noted 9.0% of the time and state Internet sites (5.9%). Respondents also mentioned newspaper articles (4.8%) and “other” Internet sites (4.4%) and newspaper ads (4.3%). Those were followed by magazine articles (4.0%), and AAA information (3.4%).
- Survey participants were also asked to suggest the best media sources for advertising to reach more people like themselves and to make them aware of Wisconsin as a vacation destination. Newspaper was a clear first choice noted 47.9% of the time and accessing links on the Internet followed and was noted 37.1% of the time. Magazines was cited with a frequency of 31.3%.
- Network and cable TV were the strong second tier choices noted 18.4% and 18.2% of the time respectively. Radio advertising was noted 15% of the time.
- Billboards (9.3%) and sports shows (7.0%) comprised the next level of recommendations. None of the other options were mentioned more frequently than 1.8% of the time.

Lodging and Travel Group Characteristics:

- Overall, 71% of the respondents were on overnight trips. On average, those who were on overnight trips spent 2.57 nights in the area where they were interviewed.

- The most frequent type of lodging used was hotels, noted 33.4% of the time. Staying at motels was the second most frequently cited type of lodging (20%) followed by staying with friends and relatives (17.1%).
- Second/vacation homes (7.2%), RV camping (6.2%), modern resorts (5.8%) and B&Bs (4.3%) followed while tent camping (3.1%) and rustic resorts/cottages (2.7%) comprise the next tier of lodging selected.
- Over one-third (35%) of all respondents said they had or would be traveling to other areas of the state while on their trip. Nearly two-thirds (63.4%) planned on staying only in the area where they were interviewed. The remaining 1.6% had not yet decided whether or not to travel elsewhere in the state.
- Nearly one-half (49.4%) of the travelers were in groups of two. Those in groups of three comprised 10.7% and groups of four (15.6%) of those surveyed. One in ten (10.5%) were traveling alone. Among larger groups, 12.6% were in groups of between five and eight people.
- The fall season is primarily a couples season. Nearly two-thirds of the time (64.6%) travel parties included couples or significant others among the group. Friends included as travel companions were mentioned 22.9% while children as members of the travel party were mentioned 18.6% of the time.
- Extended families comprise 14.7% of the mentions and traveling with a child or children was noted 2.9% of the time.
- Respondents were allowed multiple options to describe the relationship with members of their travel party. On average, there were 1.35 types of travel companions in a travel party such as friends traveling with extended family, or two couples traveling together as a “friends and spouse/significant other” group. Nearly twenty percent (19.6%) had children in the travel party.

Spending:

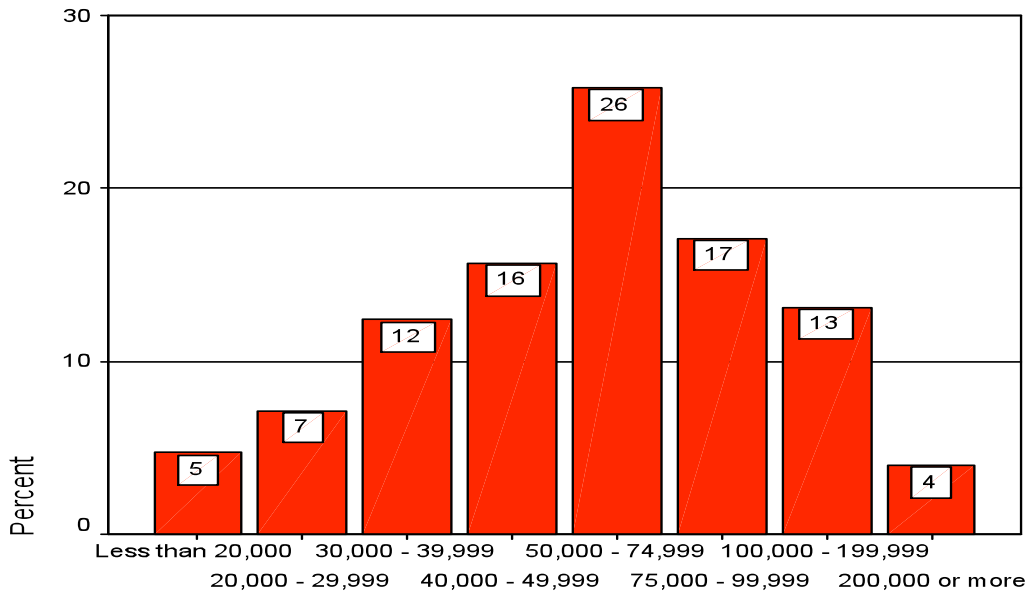
- Overall, travelers and their immediate travel group spent an average (mean) \$352 on their trip. One half of the travel groups spent more than \$250 and one-half spent less; the median being \$250.
- The frequent Wisconsin travel groups (those who visited three or more times during the past three years) had an average group expenditure of \$318.
- The first-time Wisconsin travel groups and the infrequent Wisconsin travel groups (those who have visited Wisconsin no more than two times during the past three years) spent on average, considerably more, \$541.
- The new and infrequent travelers are more likely to be motivated to vacation in Wisconsin through advertising and public relations communications since they are not as familiar with the state because they

do not necessarily have firmly established travel activity or destination habits. This may somewhat explain why they tend to spend significantly more per trip.

- Conversely, those who frequently vacation in Wisconsin are much more familiar with their options and often have favorite places to return season after season.
- It should also be noted that the infrequent travelers as well as the frequent travelers are both primarily located in our core market areas; Wisconsin, Illinois and Minnesota.

Demographics:

- There was a relatively even distribution within the age categories among respondents between 35-44, 45-54 and 55-64 years old. Each of these age groups comprised approximately 20% of the interviewed visitors.
- The 18-24 year olds accounted for 6.2%, 25-34 years olds 16.8%, 65-74 year olds 12%. Four percent (3.6%) were 75 years or older.
- Seventy percent of the fall travelers interviewed indicated they did not have children under 18 years of age living at home.
- Among the 30% with children in the home, children between the ages of 0-2 were mentioned 14.2% of the time, 3-5years olds, (28.5%) and 6-11 years olds, noted 45.2% of the time.
- Among the households with older children/young adults, those ages 12-15 years old comprised 31.2% of the mentions and kids between 16-18, 25.9%.
- Over one-half (54.9%) of those surveyed were women and 45% were men.
- Education levels were also distributed across the spectrum. Over one-half (50.7%) had a college degree or a higher college education. One in five (22.5%) had some college or were currently enrolled.
- One-quarter (25.3%) had a high school degree and an additional 1.5% had not received a high school diploma.
- Household income was distributed across the income categories.



- The majority of respondents (94.6%) described themselves as Caucasian or white and 2.6% as African American or black. The Latino/Hispanic group comprised 1.2% of the respondents and an additional 0.5%, Latino/Hispanic/Black.
- Native American Indians made up 0.9% of the respondents and those describing themselves as Asian (0.7%). Multi-racial (0.2%) was followed by East Indian (0.1%).

Activities and Satisfaction:

- Travelers were asked to list all the main activities that they or members of their immediate travel party engaged in or planned to engage in while on this trip. On average, travelers noted 3.4 activities.
- The top ten activities mentioned, excluding visiting friends and relatives, are stated from most to least frequently mentioned. Shopping, festival/event, dining, fall color viewing and museum/exhibit, relaxing, recreating, casino gaming, wildlife/nature watching and fishing.
- Respondents were also asked to list the *most important* activities planned for their getaway trip in Wisconsin. On average, travelers cited 1.1 activities. The top ten activities included attending a festival/event, visiting friends and relatives, shopping, visiting a museum/exhibit, fishing, relaxing, dining, visiting an attraction, attending a sports-related event and recreating.

Using a scale of 1 to 10 with 8-10 being very good/excellent, respondents were asked to rate 15 categories of attributes regarding their satisfaction with the area in which they stayed. Across all 15 attributes, most were rated highly. An

additional category was also used to rate travelers' "overall satisfaction" with the area.

Average Ratings

Scenery	8.68
Opportunity to relax	8.58
Service at museums, festivals, attractions	8.47
Service at lodging facility	8.38
Overnight lodging	8.35
Food	8.29
Restaurant service	8.28
Ease of locating attractions/information centers	8.28
Retail service	8.26
Adult activities	8.22
Road conditions	8.08
Shopping choices	8.05
Nightlife	7.94
Children's activities	7.77
Prices	7.67

- Over ninety percent (90.5%) of respondents rated their overall satisfaction with a fall vacation in Wisconsin as 8-10 (very good to excellent). The average (mean) rating was 8.69.

The lowest average score was on "prices paid for things"(7.67). However, in order for a customer to experience the value for the cost paid, the quality and selection of the goods and services, store hours and cleanliness need to be as high as the price charged. All of the components of a vacation add together as a composite to form a more favorable or less favorable impression.

Visitors were asked what one thing about their vacation needs improvement. In addition, they were also asked what one thing they enjoyed most about their vacation. The most frequent issues and compliments are highlighted below.

Customer Recommendations for Improvement

- Overall, the things most often mentioned that need improvement were service at lodging, restaurants and retail. Additionally, having a wider

variety of quality crafts, shopping choices, lodging and food choices was also made clear.

- Travelers were concerned with the retail and attractions' hours being limited and more so with the fact that some museums, attractions, stores and shops were closed for the season.
- Rural roads were often noted as being in moderate to poor condition.
- The lack of clean restrooms in communities as well as rest areas was mentioned frequently, particularly the roadside toilets without plumbing.

In order for Wisconsin's tourism communities to retain and enhance their competitive edge as a premiere Midwest vacation destination, these suggestions should be considered opportunities to improve customer service in order to increase and maintain the high level of satisfaction the Wisconsin tourism industry enjoys. Taking positive action, where necessary, on these traveler comments is vital to long-term success and can be done profitably.

Things That Need Improvement
A summary of verbatims

	Number of Comments	Percent
Miscellaneous <i>(traffic, service, parking, lack of bathroom facilities)</i>	77	14.0
Area attractions/festivals/events/casinos	70	12.7
Retail <i>(prices, service, not open/closing too early, variety)</i>	66	12.0
Food/restaurant/bar <i>(prices, service, not open/closing too early, variety)</i>	64	11.6
Roads/rest stops	61	11.1
Lodging <i>(prices, clean, service, variety, more rooms)</i>	59	10.7
Lack of activities	49	8.9
Weather	42	7.6
Signage/more information	32	5.8
High prices <i>(service, prices, not enough information, lack of variety)</i>	30	5.5
Total	550	100

Customer Compliments – Things Most Enjoyed

The following highlights what travelers enjoyed most about their vacation.

- The most frequently mentioned experiences were scenery, relaxation, being out of the home/work environment and spending time with friends and family.
- Woods, water and fall color, along with charming towns and friendly people played a significant role in maintaining high levels of satisfaction.
- Attractions, museums and historical sites also added to the variety of things visitors most enjoyed.
- While events were noted frequently as activities travel groups engaged in, they were not as frequently noted among the *most enjoyed* experiences.

Respondents were asked to describe their vacation experience with a word or a phrase.

- In order of mention, the following are the top 10 words or phrases: Relaxing, Friendly, Fun, Beautiful Scenery, [would] Like to Stay Longer, Refreshing, Exciting, Close to Home, Like to Return Soon and Good Value for the Cost.

Those respondents who rated the *Scenery* good to excellent or a 7 to 10 on the scale were asked to describe the characteristics that made them feel that way.

- Fall color, water, rolling hills and the rural and farm scenes were by far the most praised of the many things mentioned.
- The small towns and their clean, picturesque and charming atmosphere and architecture were also mentioned with regularity.

Most Enjoyed About Vacation
A summary of verbatims

	Number of Comments	Percent
Visiting family/friends	301	37.2
Miscellaneous (dining, lodging, restaurants, atmosphere, nightlife, friendly people, etc.)	165	20.4
Sightseeing/scenery/countryside	123	15.2
Relaxing	118	14.6
Nature (woods, water, birding, fall color, etc.)	99	12.2
Outdoor activities (hike, bike, walk, fishing, etc.)	99	12.2
Historical sites/museums/arts/educational	97	12.0
Shopping (craft, retail, etc.)	84	10.4
Attractions/casino	77	9.5
Festivals/events	71	8.8
Get-away	41	5.1
Total	809	100

Respondents were asked about the likelihood that they would return during the next 12 months for another Wisconsin vacation. Those who were somewhat or very likely to vacation in Wisconsin were asked in which month or months they were most likely to vacation.

- Nearly eighty-percent (78.9%) indicated they were very likely to vacation during the next 12 months and an additional 14% said they were somewhat likely. Seven percent were unsure or unlikely to vacation during the upcoming 12 months.
- On average, those who were more likely to vacation in Wisconsin during the next 12 months mentioned, in order of frequency, June, October, September, August, July and May.
- The least frequently mentioned months were January, February and March.

- Almost all respondents were very likely (79.9%) or somewhat likely (16.3%) to recommend a Wisconsin vacation to friends or relatives, a combined total of 96.2%.

Appendix A and B at the end of the report contain lists of both suggestions for improvement and things most enjoyed about the area travelers vacationed.