



WISCONSIN DEPARTMENT OF TOURISM
RESEARCH

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2002-2003 Four Season In-Market Leisure Traveler Survey

Spring 2003 Segment

EXECUTIVE SUMMARY

APPLICATIONS AND KEY FINDINGS

August 2003

Table of Contents

Background.....	1
Executive Summary	
Trip Characteristics.....	2
Trip Planning Sources.....	2-3
Lodging and Travel Group Characteristics.....	3-4
Spending.....	5
Demographics.....	5-6
Activities and Satisfaction.....	7-8
Repeat Visitors.....	9-10

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

Spring Segment

Background:

This is the third in a series of four seasonal surveys. The Wisconsin Department of Tourism began this segment of the study during mid-April and continued through the end of May.

The purpose of the study series is to evaluate a range of marketing topics in four different areas of the state for each season. These range from visitor attitudes, satisfaction levels and activities, to media recommendations, spending patterns, travel group composition and demographics.

In order to determine the spring activities travelers enjoy, a combination of urban and rural areas were selected. The survey areas for the spring segment include the City of Milwaukee, Madison/Dane County, the greater Monroe/Juneau/Adams County area and Walworth County. Within each area, 325 travelers were interviewed for a total sample of 1300 completed surveys.

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

The following report is structured to provide comparative findings between the four areas as well as the composite findings found in the Executive Summary of this report. While the data show information pertinent to each of the areas studied, in many cases, the information is applicable to other similar regions of the state.

EXECUTIVE SUMMARY

Combined Area Key Findings

Trip Characteristics

- The majority (89.8%) of the travelers were on a leisure trip.
- On average, travelers have taken almost 10 trips in Wisconsin during the past three years. Those who have taken two or fewer Wisconsin vacations during the past three years comprise one-quarter (24.8%) of those interviewed.
- It can be suggested these infrequent travelers are the most likely to be motivated to travel in Wisconsin due to the awareness generated through public relations, marketing and promotional activities.
- Three-quarters (71.4%) of the spring visitors were short-term planners. Travelers indicated that the month or months they began to plan their trip most frequently occurred during March, April and May. One-third of the travelers indicated they began their planning during May.
- Overall, the most frequently mentioned reasons for choosing spring as the time of year to travel were *mild weather/easy to travel*, noted 22.4% of the time, followed by the *visiting friends and relatives*, cited 17.8%, *spur-of-the-moment*, 11.6%, and attending a *festival or event* 11.2%.
- Other reasons for choosing this particular time of year were *adults' schedules* (10.2%), *personal events* such as a *wedding, birthday, etc.* (10.1%). *Golfing, fewer insects, less crowded* and *kids school schedules* were each noted 6% of the time.
- The primary reasons for choosing their particular destination included *friends and relative live nearby*, mentioned 21.4% of the time, *festival/event* (9.5%), *outdoor activities* (6.9%), *shopping* (5.5%) and *attractions* (5.4%).

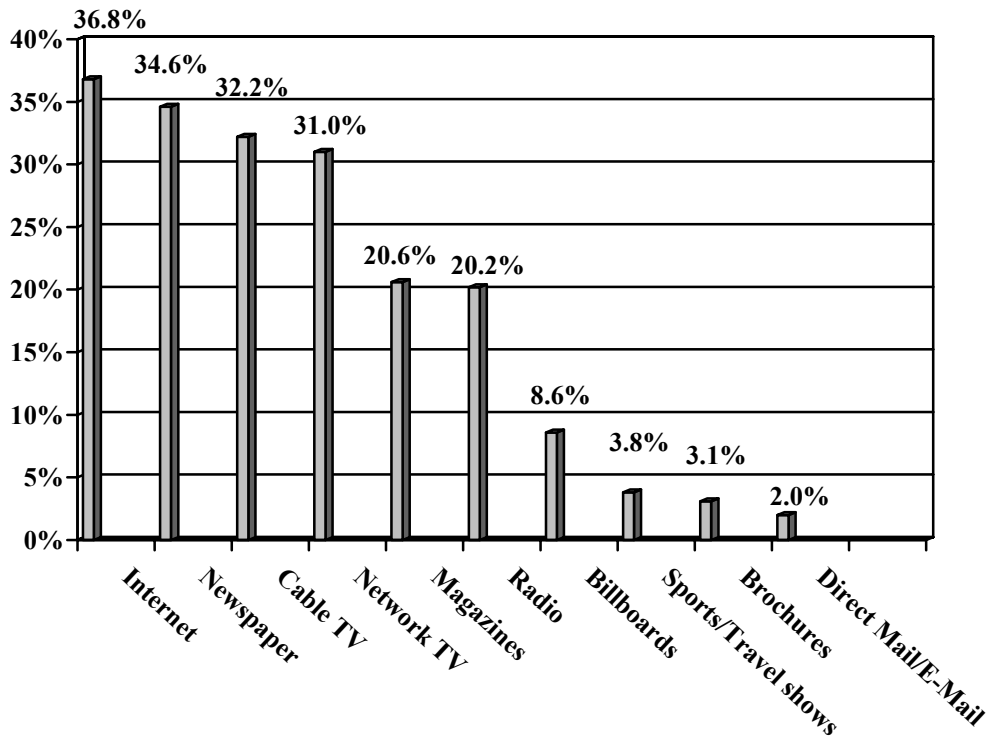
Trip Planning Sources

- On average, respondents noted 1.6 sources of information used in planning their trip. The most frequently noted sources were *friends and relatives*, cited 38% of the time; followed by *local Internet sites* (17.2%), *other Internet sites* (13.3%), the *State Internet* (11.9%), and *prior knowledge* (9.3%).
- *AAA resources* (6.2%), *state publications* (3.9%), *information racks* (hotels, etc.) and *local brochures*, each cited 3.2% of the time, were the next most frequently mentioned sources. Not using any planning materials was mentioned 23% of the time.
- Respondents were also asked which information was **most useful** for planning their trip. *Friends and relatives* were noted 26.9% of the time.

- Other sources included *local Internet sites* (10.0%), *prior knowledge* (7.2%), *other Internet sites* (6.5%), the *State Internet site* (4.5%) and *AAA resources* (3.0%).

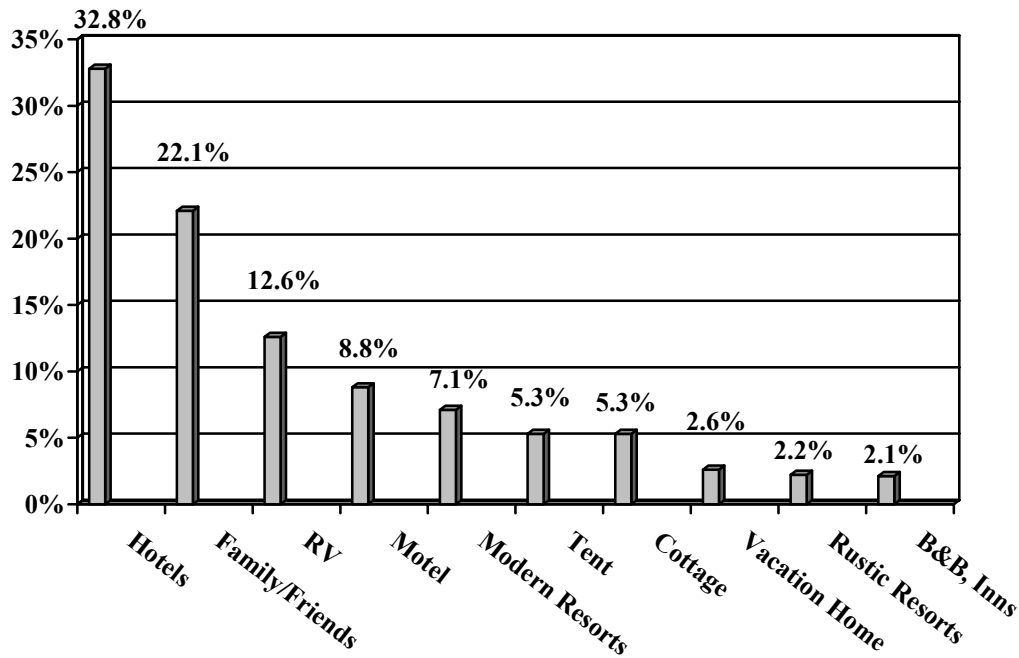
Advertising Recommendations

- Survey participants were asked to suggest the best types of advertising to generate awareness and motivate more people like themselves to vacation in Wisconsin. On average, respondents offered two media suggestions (2.03). Note that percentages will exceed 100% due to multiple responses.



Lodging and Travel Group Characteristics

- Overall, 62% of the respondents were on overnight trips and, on average, spent 3 nights in the area where they were interviewed. The following graph displays the lodging accommodations used by the spring travelers.



- Three-quarters of the respondents did not have plans to travel outside of the area where they were interviewed (73.0%) while the other one-quarter (27.0%) said they had or would be traveling to other areas of the state while on their trip.
- Almost one-half (45.6%) of the travelers were in groups of two; groups of three comprised 12.3% and groups of four accounted for 15.8%. Just over one in ten (12.1%) were traveling alone. Among larger groups, 12.7% were in groups of between five and eight people.
- The relationships among travel parties was mixed so percentages will be greater than 100%. The average size of the travel party was 3 people. Just over one-quarter (27.3%) were traveling with children (under 18 years of age) in their group.

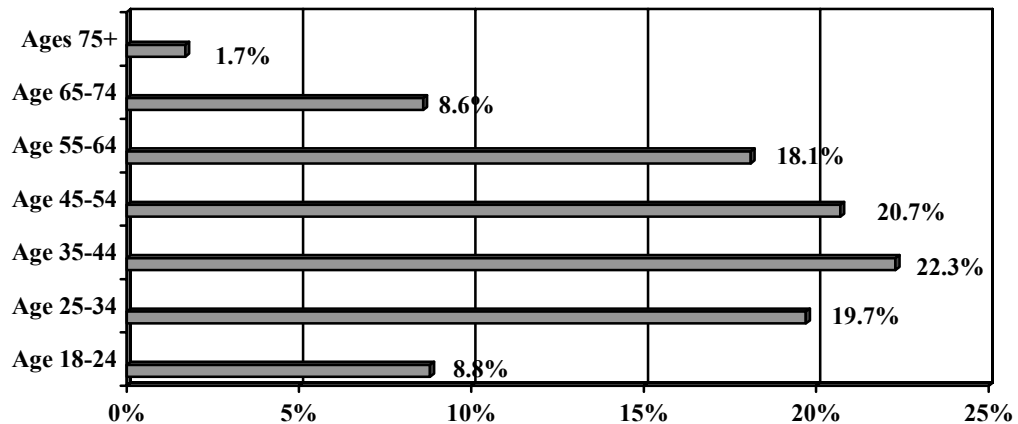
Travel Party Composition	Percent of Mentions
Spouse	49.3
Child/Children	26.6
Friends	23.0
Alone	12.1
Extended Family	11.5
Significant Other	10.2

Spending

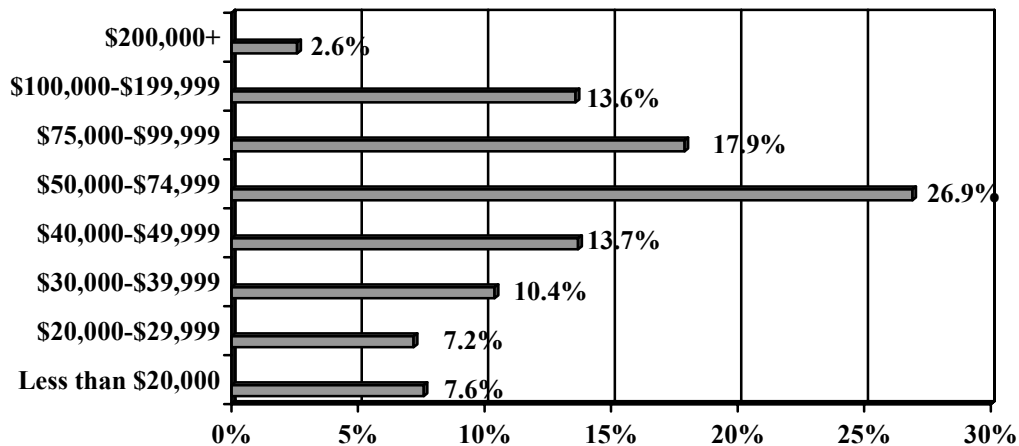
- Overall, travelers and their immediate travel group spent an average (mean) \$350 on their trip. Those on daytrips spent \$137 and overnight visitors spent \$481.
- The frequent Wisconsin travel groups (those who visited three or more times during the past three years) had an average group expenditure of \$317 and, on average, visited 12.38 times during that period. This group comprises 75.2% of those interviewed.
- The rough average 3-year value of a frequent visitor group is \$3,925 (12.38 trips x \$317 per trip).
- The infrequent Wisconsin travel groups (those who have visited Wisconsin no more than two times during the past three years) spent considerably more, \$451 on average. Typically, they visited only once during the past three years. This group comprises 24.8% of the travelers that were interviewed.
- 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 the infrequent traveler is less familiar or may not have a firmly established travel activity routine or determined destination, it appears they tend to spend 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. Consequently, this may explain why this group does not spend as much, on average, as the infrequent visitor.
- Good publicity and marketing efforts can attract the new visitor. Quality attractions, activities and services convert them to loyal customers.

Demographics

- Ages among respondents are similar to the general population.



- Among the spring travelers, there was a lower percentage of families with kids under 18 living in the home (34.6%) than found during the winter study, which showed 41.4% of respondents with kids in the home. The spring findings are similar to the fall study where thirty percent of the fall travelers had kids living at home.
- On average, spring visitors had 1.5 kids living at home. Children between the ages of 0-2 were mentioned 17.4% of the time, 3-5 years old (31.7%) and 6-11 years old (46.8%).
- Among the households that included older children/young adults, kids between the ages of 12-15 were mentioned 34.5% of the time and young adults, 16-18 years old, were noted 21.7% of the time.
- Just over one-half of the respondents (51.9%) were men; 48.1% were women.
- Education levels show that over one-half (57%) had a college degree or a higher education, 22.6% had some college or were currently enrolled.
- Fewer than one in five (19.3%) had a high school degree while 1.1% had not graduated from high school.
- As the graph below shows, household income was normally distributed across the earnings categories.



- The majority of respondents (92.8%) described themselves as Caucasian or white and 3.6% as African American or black. The Latino/Hispanic group comprised 1.8% of the respondents and an additional 0.2%, Latino/Hispanic/Black.
- Native American Indians made up 0.2% of the respondents and those describing themselves as of Asian American (1.4%).

Activities and Satisfaction

Travelers were asked to list all the 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 3.7 activities, more activities than found in either the fall or winter study.
- The top five activities mentioned include *dining*, noted 52% of the time, *retail shopping* (44%), *visiting friends and relatives* (27%), *relaxing with a spouse or significant other* (25%) and, *visiting an exhibit or museum* (22%).
- The next tier of activities was comprised of *bars and nightlife* (15%), *recreating with friends* (15%), *wildlife/nature watching* (15%), *festivals/events* (13%) and *swimming in a pool*, mentioned (11%) of the time.
- Other activities of importance include *visiting an attraction* (10%), *hiking* (9%), *state or county parks* (9%), *golfing* (8%), *attending sports event* (8%) and *visiting a zoo* (8%).
- Respondents were also asked to list the **most important** activities on their getaway in Wisconsin. On average, travelers cited one activity. The top five **most important** activities noted were *visiting family/friends*, noted 15% of the time, *relaxing with a spouse or significant other* (14%), *visiting an exhibit or museum* (10%), *shopping* (10%), and *attending a festival/event* (7%).

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.

Average Ratings

Opportunity to relax	9.10
Overall Impression	9.00
Service at museums, festivals, attractions	8.98
Scenery	8.75
Restaurant service	8.75
Food at restaurants	8.74
Service at lodging facility	8.71
Retail service	8.65
Lodging facilities	8.63
Children's activities	8.58
Adult activities	8.48
Shopping choices	8.42
Ease of locating attractions/information centers	8.39
Nightlife	8.29
Road conditions	8.18
Prices	7.84

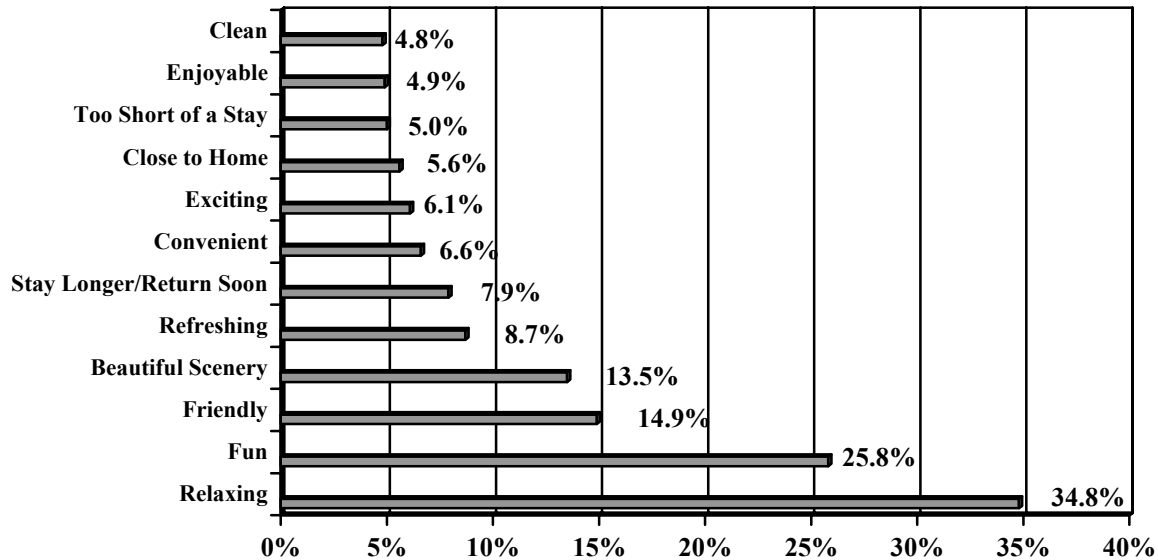
Overall, these regions of the state combined rated high on almost all categories. The lowest average scores were on *ease of locating attractions/information centers* (8.39), *nightlife* (8.29), *road conditions*, (8.18) and *prices paid for things* (7.84).

In order for customers to feel that the value of their travel experience was worth the cost, it is more important that the quality of goods and services, cleanliness, variety, convenience and overall appearance of an area is equal to or exceeds the amount the customer pays. Rather than focus on price discounts to create value, focus on ensuring quality that is consistent with the prices charged for the travel experience.

Overall satisfaction was rated a 9.0.

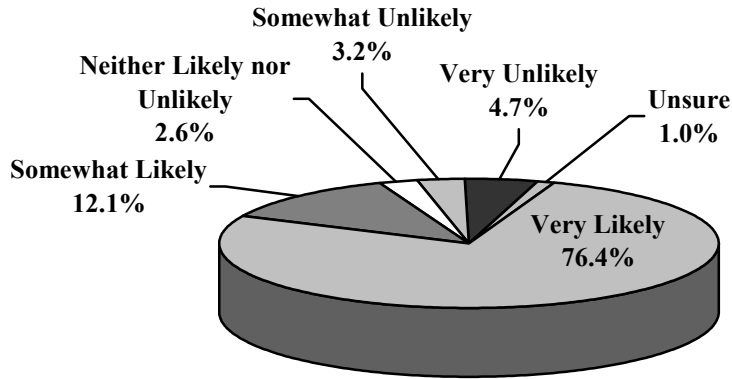
Description of Wisconsin Vacation

Respondents were asked to describe their vacation experience with a word or a phrase. On average, they provided two descriptives. The following graph provides the most frequently mentioned responses. Please note percentages will not add to 100% due to multiple responses.



Repeat Visitors

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.

- On average, those who were likely to vacation in Wisconsin during the next 12 months noted 4 months in which they might travel. The following table shows the frequency of mention for each month. Unlike the winter travelers, the spring travelers in the areas we interviewed selected a narrow range of preferences with emphasis on the warm months.

July	69.2%
June	67.9
August	67.0
September	45.4
May	40.8
October	34.0
April	17.9
November	17.2
December	17.1
January	12.2
March	11.8
February	11.7

- Over three-quarters (78.7%) of the respondents were very likely to recommend a Wisconsin vacation to friends or relatives, an additional 16.1% were somewhat likely to recommend Wisconsin. These two figures make for a combined total of 94.8%.