WISCONSIN DEPARTMENT OF TOURISM

2002-2003
Four Season In-Market
Leisure Traveler Survey

Summer 2003 Segment

EXECUTIVE SUMMARY

APPLICATIONS
AND
KEY FINDINGS

November 2003

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Summer Segment
2003

Background:

This is the fourth in a series of four seasonal surveys. The Wisconsin Department of Tourism began this segment of the study during June and early July in the northwestern areas of the state and continued the survey from July through the end of August in the southwestern areas.

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 summer activities travelers enjoy, a combination of urban, resort and rural areas were selected. The survey areas for the summer segment include the Hwy. 63 Corridor running southwest from Bayfield and Ashland, the Hwy. 53/63 Corridor from Superior southwest to Hudson, the Grant County/southwestern Wisconsin area and the Greater La Crosse County area. Within each area, 325 travelers were interviewed for a total sample of 1305 completed surveys.

Those interviewed were pre-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 geographically similar regions of the state.

EXECUTIVE SUMMARY
Combined Area Key Findings

Trip Characteristics

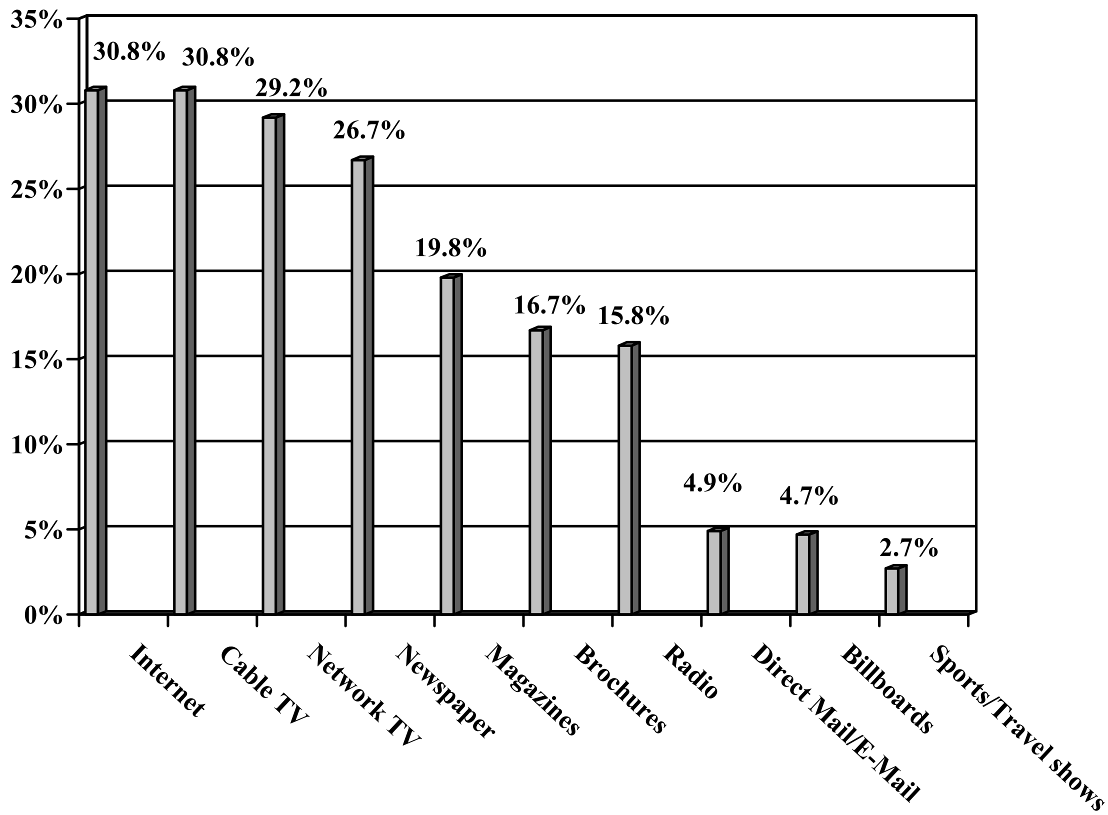
- The majority (97.0%) of travelers were on a leisure trip.
- On average, travelers have taken just over 9 trips in Wisconsin during the past three years. Those who have taken two or fewer Wisconsin vacations during the past three years (the new and infrequent travelers) comprise nearly one-third (29.1%) of those interviewed.
- Just over one-half (57.1%) of the summer visitors were short-term planners; travelers who indicated that they began planning for this trip during the month or the month before they traveled. One-third (35.7%) of the travelers alone indicated they began their planning within the month they vacationed.
- Overall, the most frequently cited **reasons for choosing summer** as the time of year to travel were *mild weather/easy to travel*, noted 21% of the time, followed by *spur-of-the-moment* (14%), attending a *festival, fair or event* (12.9%), *visiting friends and relatives*, cited 9% and *kids school schedules*, noted 8% of the time.
- Other reasons for choosing this particular time of year were *personal events* - weddings, birthdays, etc. (8%), *travel party's schedules* (7.5%), *work schedules* (7%)*, adults schedules* (6%) and *general outdoor recreation* (5.5%).
- Travelers, on average, noted 1.5 activities as reasons for choosing this time of year.
- The primary **reasons for choosing** their **particular destination** included *friends and relative live nearby*, (17%), *festival/event* (10%), *shopping* (5%) *outdoor activities* (4.5%), *natural beauty* (4%) and *sightseeing* (3%).

Trip Planning Sources

- On average, respondents noted 1.7 sources of information used in planning their trip. The most frequently noted sources were *friends and relatives* cited 66% of the time followed by a combination of *state and local brochures/publications* (19%).
- The *state Internet site* (15%) was next followed by *local Internet sites* (14%), *other Internet* sites (8%), *AAA resources* (6%) and *map/motor club info.* (5%).
- Respondents were also asked which information was **most useful** for planning their trip. *Friends and relatives* were noted 49%, *state Internet site* (8%), s*tate and local brochures/publications* (7%), *local Internet sites* (6%). *Other Internet sites* and *AAA resources* each gleaned 4%.

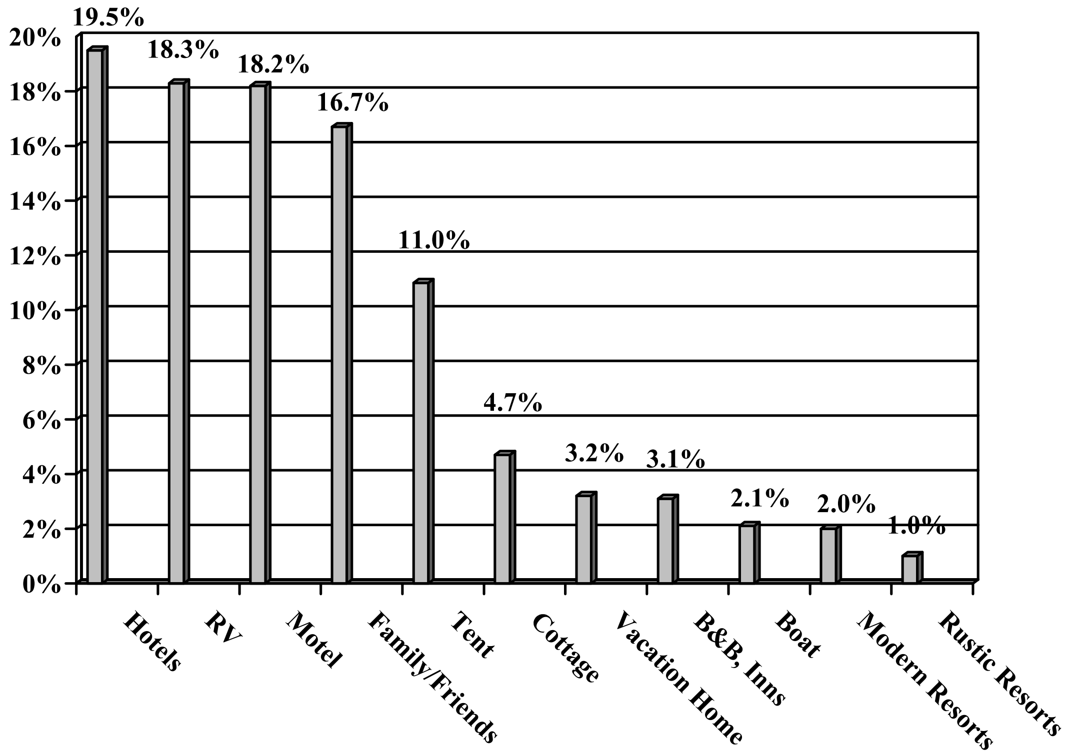
Advertising Recommendations

- 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 (1.94). Note that percentages will exceed 100% due to multiple responses.



Lodging and Travel Group Characteristics

- Overall, 69.3% of the respondents were on overnight trips. On average, those travelers spent 3.6 nights. The following graph displays the lodging accommodations used by the overnight summer travelers.



- Just over one-half (54%) of the respondents did not have plans to travel outside of the area where they were interviewed while the other 46% said they had or would be traveling to other areas of the state while on their trip.
- The average party size was 3 people. Almost one-half (46%) of the travelers were in groups of two; groups of three comprised 12% and groups of four accounted for 17%. Just over one in ten (11%) were traveling alone. Among larger groups, 13% were in groups of between five and eight people.

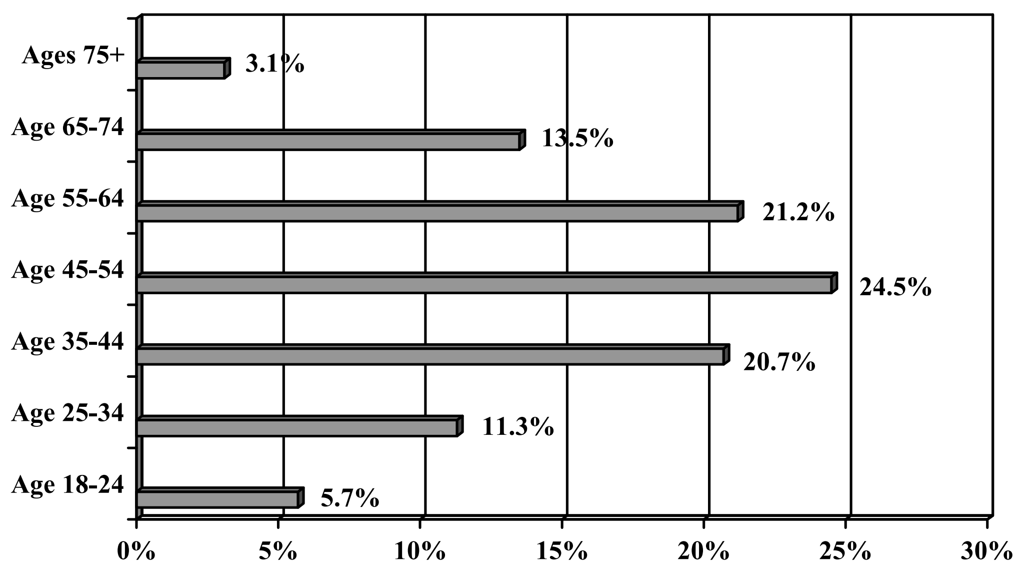
Travel Party Composition	Percent of Mentions
Spouse	62.9
Child/Children	28.1
Friends	15.4
Alone	10.5
Extended Family	8.8
Significant Other	6.7
Grandchildren	4.7

Spending

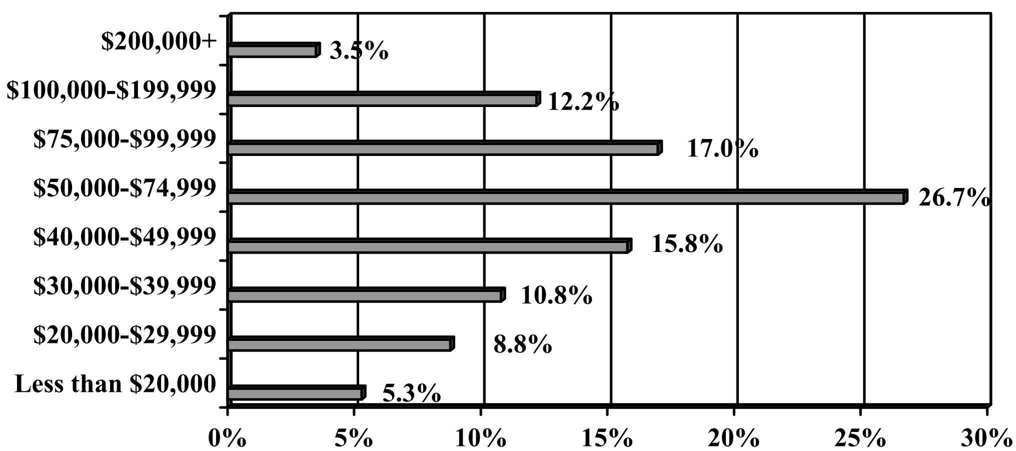
- Overall, travelers and their immediate travel group spent an average (mean) $398 on their trip. Those on daytrips spent $152 and overnight visitors spent $502.
- The frequent Wisconsin travel groups (those who visited three or more times during the past three years) had an average group expenditure of $376 and, on average, visited 12.70 times during the past three years. This group comprises 71% of those interviewed.
- The rough average 3-year value of a frequent visitor group is $4,775 (12.70 trips x $376 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 on this trip than the frequent traveler, $488 on average. Typically, they visited 1.22 times during the past three years. This group comprises 29% of the travelers that were interviewed.

Demographics

It should be noted the majority of travelers in these areas tend to be slightly older Baby Boomers. Just over one-third (37.7%) are between the ages of 18 and 44. In order to ensure future growth as the population ages, consideration should be given to attracting new younger travelers to the area and building long-term relationships and loyalty.



* Among the summer travelers in these areas, households with kids under 18 living in the home was smaller (32.9%) than that found in the winter study, which showed 41.4% of respondents with kids in the home. The spring and fall also show around thirty percent of the travelers had kids living at home.
* On average, summer visitors had 1.5 kids living in the home and their ages are as follows: 0-2 year olds were mentioned 15.5% of the time, 3-5 years old (22.0%) and 6-11 years old (51.9%).
* Among the households that included older children/young adults, kids between the ages of 12-15 were noted 41.8% and young adults, 16-18 years old, were noted 23.9%.
* Just over one-half of the respondents (50.9%) were men; 49.1% were women.
* Education levels show that over one-half (54.3%) had a college degree or a higher education, 21.7% had some college or were currently enrolled.



* One in five (22.7%) had a high school degree while 1.2% did not.
* As the graph above shows, household income was distributed across the earnings categories.
* The majority of respondents (96.5%) described themselves as Caucasian or white and 0.2% as African American or black. The Latino/Hispanic group comprised 0.5% of the respondents and an additional 0.1%, Latino/Hispanic/Black.
* Native American Indians made up 1.0% of the respondents and those describing themselves as of Asian American (0.5%).

Given the low percentages of other ethnic groups, extending invitations to the non-Caucasian segments of the market is another opportunity for growth.

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.

- Summer appears to provide a greater wealth of recreational opportunities. On average, travelers noted 4.8 activities, compared to the 3.7 activities found in the spring survey, which was also greater than that found in either the fall or winter study.
- The top five activities cited include *dining*, 62%, *retail shopping* and *sightseeing* (each noted 48%), *visiting an exhibit or museum* (25%) and *visiting state or county parks* (23%).
- The next tier of activities was comprised of *visiting friends and relatives* (21%), *festivals/events* (20%), *hiking* (19%), *relaxing with a spouse or significant other* (18%) and *visiting an attraction* (15%).
- Other significant activities include *fishing* and *visiting an historic site*, each cited 14%, *swimming in lakes/rivers* (13%), *motorboating* (13%) and *wildlife/nature watching* (12%).
- Respondents were also asked to list the ***most important*** activities on their getaway in Wisconsin. The top five were *sightseeing*, noted 14%, *visiting friends/relatives* (12%), *attending a festival/event* (10%), *relaxing with a spouse or significant other*, *visiting an attraction* and *shopping* were each mentioned 6%.

Using a scale of 1 to 10 with 8-10 being very good/excellent, respondents were asked to rate 15 categories regarding their satisfaction with the area.

Average Ratings

Scenery	9.46
Opportunity to relax	9.27
Overall Impression	9.10
Service at museums, festivals, attractions	8.93
Service at lodging facility	8.61
Ease of locating attractions/information centers	8.52
Restaurant service	8.46
Road conditions	8.43
Food at restaurants	8.41
Retail service	8.38
Lodging facilities	8.34
Adult activities	8.26
Nightlife	8.24
Shopping choices	7.79
Prices	7.74
Children’s activities	7.54

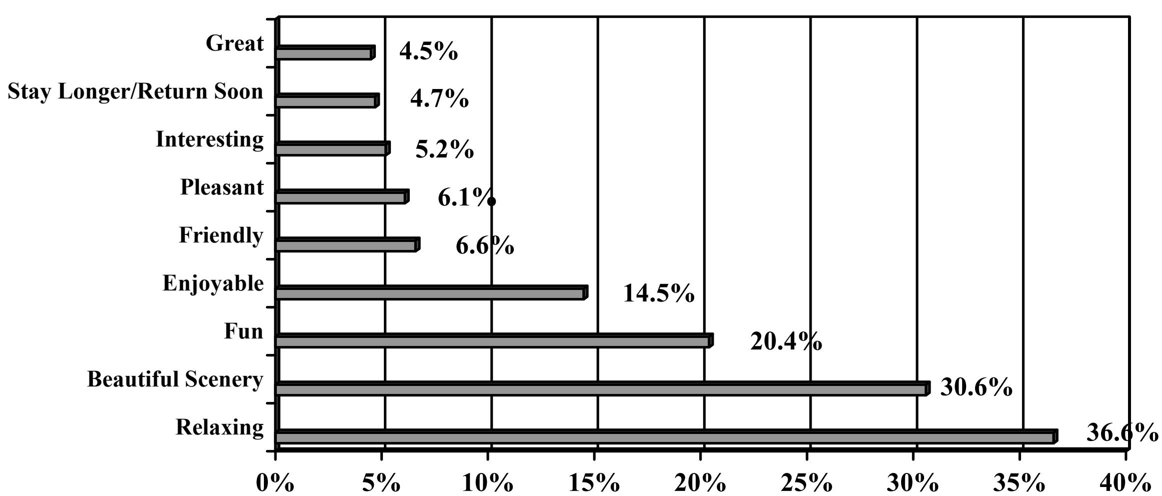
The overall impression of the areas studied was rated a 9.10, an excellent rating. Nearly all, (94.4%) rated their impression as an very good/excellent (8-10). The combined regional ratings for these four areas of the state are on the upper end in most of the categories. The lowest average scores were on *shopping choices* (7.79), *prices paid for things* (7.74) and *children's activities* (7.54).

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 for their trip. Rather than focus solely on price discounts to create value, also focus on ensuring quality that is consistent with the prices charged for the travel experience.

Since children's activities were rated the lowest and summer is among the more popular vacation seasons for families with children, enhancing the available children's activities may prove to increase family driven tourism in the western portions of Wisconsin.

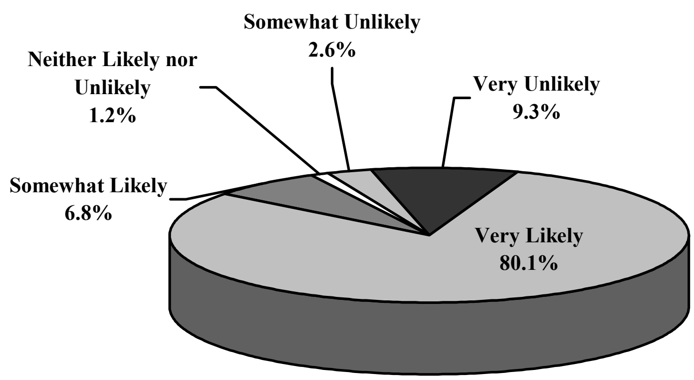
Description of Wisconsin Vacation

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 cited 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, summer traveler preferences tend toward the warmer months.

August	66.5%
July	64.6
June	58.1
September	51.6
October	41.5
May	29.2
April	19.2
November	18.3
December	17.6
January	15.8
March	15.2
February	15.0

- Almost all travelers (91%) were very likely to recommend a Wisconsin vacation to friends or relatives, an additional 6.6% were somewhat likely to recommend Wisconsin. These two figures make for a combined total of 97.5%.