



WISCONSIN DEPARTMENT OF TOURISM
RESEARCH

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

Cross-Seasonal Summary

January 2004

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2002-2003
Four Season In-Market Leisure Traveler Survey
Cross-Seasonal Summary Comparison
Urban – Rural/Resort

Background

This report is a summary comparison of the eight urban and eight rural/resort regions surveyed during each of the four seasons. The Wisconsin Department of Tourism began this study during the fall of 2002 and continued the survey through the end of August 2003. A total of 5,218 completed interviews are used for this report; approximately 325 completed interviews for each of the sixteen regions.

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 purpose of this report is to evaluate and compare similarities and differences among the eight urban and eight rural/resort regions studied regardless of the season. The findings in this report will highlight the verbal impressions of a Wisconsin vacation and identify the state's brand image. The study also addresses a range of marketing topics ranging from visitor attitudes, satisfaction levels and activities, to media recommendations, spending patterns, travel group composition and demographics.

It should be noted that often urban visitors will use a city as a staging area to access recreation in both an urban as well as rural environments while those staying in a rural or resort area may often visit a city while on their vacation.

A copy of each of the seasonal studies is available by contacting David Scheler at dscheler@travelwisconsin.com or (608) 261-8187. The areas noted with an F (Fall), W (Winter), Sp (Spring) or S (Summer) identify the season in which that area was studied.

Urban Counties/Regions:

Brown/Shawano (W)
Dane (Sp)
Fond du Lac/Winnebago (W)
La Crosse (S)
Marathon./Wood/Portage (W)
Milwaukee (Sp)
Racine/Kenosha (W)
Sheboygan (F)

Rural/Resort Counties/Regions:

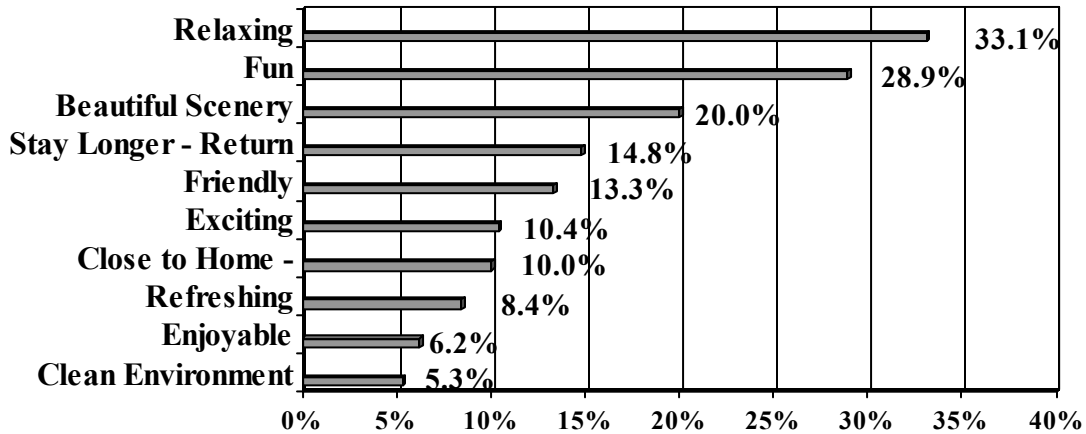
Bayfield Hwy. 63 Corridor (S)
Douglas/St. Croix Hwy 53/63 Area (S)
Grant Hwy 151/18 Corridor (S)
Iowa/Green (F)
Monroe (Sp)
Sawyer (F)
Vilas/Oneida (F)
Walworth (Sp)

SUMMARY

Brand Image

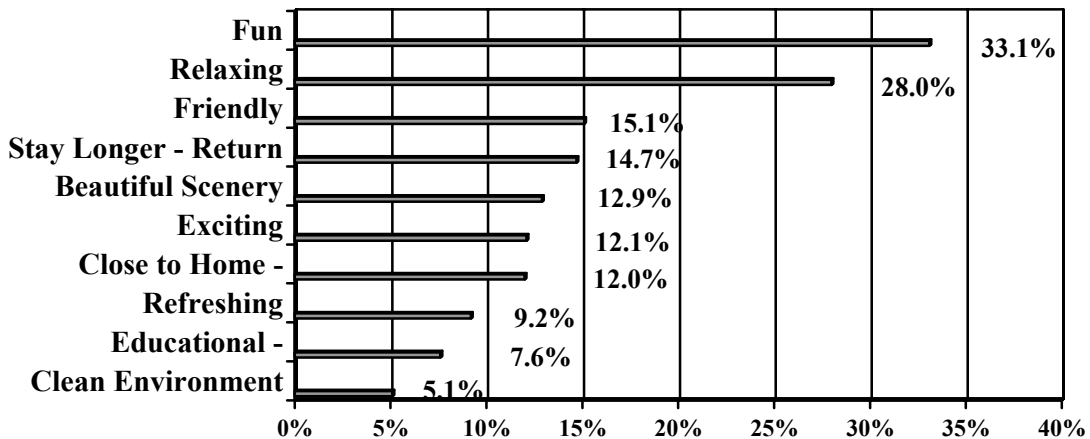
Key Descriptors of a Wisconsin Vacation (Urban and Rural/Resort Combined)

Respondents were asked to describe their vacation experience with a word or a phrase. On average, they provided two descriptives with over 300 verbatim categories noted. The following graph provides the most frequently mentioned verbatims from the 10,882 descriptions offered in the urban and rural/resort areas combined.



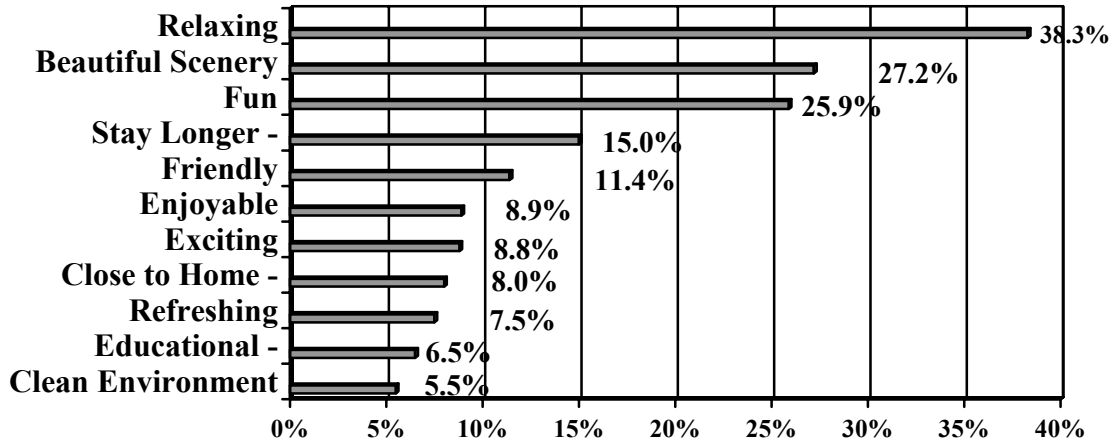
Key Urban Area Descriptors

Visitors in the eight urban areas described their vacation experience with an average of two descriptives. The following graph provides the most frequently mentioned responses from 5,311 descriptions offered.



Key Rural/Resort Area Descriptors

Visitors in the eight rural/resort areas described their vacation experience with an average of two descriptives. The following graph provides the most frequently mentioned responses from 5,571 descriptions offered.



Brand Image Conclusions

A brand is the summary of impressions or feelings, owned by the customer. The brand image is called upon by a customer as a reference when the location, product or service is brought to mind through conversation, public relations or advertising. Conversely, a slogan or call to action may elicit or reinforce the feelings or reasons a customer chooses a product.

The findings from interviews with travelers in both urban and rural/resort areas are surprisingly similar. It is clear from these descriptions that the perception of a Wisconsin vacation – urban or rural – is very comparable. Regardless of where travel is undertaken, the brand image of Wisconsin is a fun and relaxing experience with beautiful scenery and friendly people where travelers want to stay longer.

The key descriptors are the perceived benefits and attributes that travelers experience and anticipate when on vacation in Wisconsin. These are the images that are called to mind when a traveler is reminded of Wisconsin.

Satisfaction

Using a scale of 1 to 10 with 8-10 being very good/excellent, respondents were asked to rate 15 categories evaluating their satisfaction with the area(s) in which they traveled.

Aggregate Average Ratings

Opportunity to relax	8.81
Overall Impression	8.78
Service at museums, festivals, attractions	8.67
Scenery	8.57
Service at lodging facility	8.47
Restaurant service	8.40
Food at restaurants	8.38
Lodging facilities	8.37
Ease of locating attractions/information centers	8.35
Retail service	8.34
Adult activities	8.26
Road conditions	8.20
Shopping choices	8.07
Nightlife	8.05
Children's activities	7.91
Prices	7.68

The overall satisfaction rating of the areas studied, regardless of season or tourism infrastructure, (i.e., urban, nature, parks, resorts, etc.) was rated an 8.78. Nearly all, (94.4%) rated their impression as very good/excellent (8-10). The combined ratings for both urban and rural/resort areas are on the upper end in most of the categories. The lowest average scores were on *shopping choices* (8.07), *nightlife* (8.05), *children's activities* (7.91) and *prices paid for things* (7.68).

Conclusions and marketing Implications

In order for customers to feel that the value of their travel experience was worth the cost, the quality of goods and services, cleanliness, variety, convenience and overall appearance of an area must equal or exceed the amount the customer pays for their trip.

Rather than focus exclusively upon price discounts to create value, focus on ensuring quality that is consistent with the prices charged for the travel experience.

Urban Area Ratings

Service at museums, festivals, attractions	8.75
Opportunity to relax	8.67
Overall Impression	8.66
Restaurant service	8.46
Service at lodging facility	8.42
Food at restaurants	8.42
Lodging facilities	8.36
Retail service	8.34
Ease of locating attractions/information centers	8.31
Adult activities	8.31
Shopping choices	8.22
Road conditions	8.20
Nightlife	8.14
Children's activities	8.13
Scenery	8.08
Prices	7.68

Marketing Opportunities

Since nightlife and scenery were rated among the lowest of the categories, enhancing the general ambiance of the community and increasing the venue of evening activities may prove to enhance the travel experience in Wisconsin's urban destinations.

Rural/Resort Area Ratings

Scenery	9.04
Opportunity to relax	8.95
Overall Impression	8.90
Service at museums, festivals, attractions	8.59
Service at lodging facility	8.51
Lodging facilities	8.38
Ease of locating attractions/information centers	8.38
Retail service	8.33
Restaurant service	8.33
Food at restaurants	8.32
Adult activities	8.20
Road conditions	8.20
Shopping choices	7.92
Nightlife	7.97
Children's activities	7.71
Prices	7.67

Marketing Opportunities

Since shopping choices, nightlife and children's activities were rated among the lowest, enhancing these areas will enhance the experience of both adults and those traveling with children.

Trip Characteristics

- The majority (92.0%) of travelers were on a leisure trip compared to those recreating while on a business or combination business/leisure trip. The percentage of those purely on a leisure trip was 88% in the urban areas and 96% in the rural/resort areas.
- On average, travelers have taken almost 11 trips in Wisconsin during the past three years, 10.5 in the urban areas and 11.5 in the rural/resort areas.
- New or infrequent travelers, those who have taken two or fewer Wisconsin vacations during the past three years comprise nearly one-fifth (19.7%) of those interviewed in each of the two regions studied.

Conclusion

It can be suggested these infrequent travelers may have less or a minimal familiarity with Wisconsin. As such, these travelers may be more motivated to travel in Wisconsin due to awareness generated by public relations, marketing and other promotional activities.

Urban and Rural/Resort Comparative Spending

- Overall, travelers and their immediate travel group spent an average (mean) \$382 on their trip and stayed 1.88 nights.
- Rural/Resort visitor groups stayed somewhat longer, 2.24 days and spent more (\$377) per group for this trip than did those in the urban areas who stayed 1.52 days and averaged \$332 in group spending.
- The average travel party size was similar for the urban and rural/resort areas (3 people).
- Those on daytrips comprise 35% of those surveyed and spent \$132. The overnight visitors comprised 65% of the sample and spent \$491.
- Daytrippers in the urban areas comprised 42.4% and spent an average of \$134 while daytrippers in the rural/resort areas made up 28% and spent \$130.
- Over one-half (57.6%) of travelers in the urban areas were overnight visitors and spent, on average, \$486 compared to the overnight groups in the rural/resort areas (72%), who spent an average of \$495.
- On average, overnight travelers stayed 2.9 nights. Overnight stays in the urban areas averaged 2.64 nights and those in the rural/resort areas, 3.10 nights.

Frequent versus Infrequent Visitor Expenditures

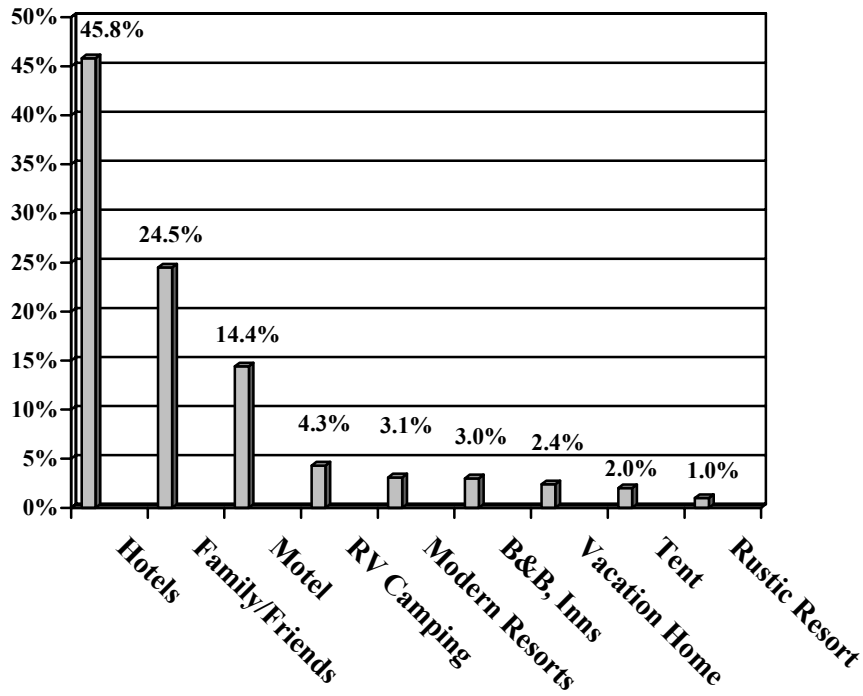
- The frequent Wisconsin travel groups (those who visited three or more times during the past three years) had an average group expenditure of \$354 and, on average, visited 13.39 times during the past three years. This group comprises 80.3% of those interviewed.
- The average 3-year value of a frequent visitor group is \$4,740 (13.39 trips x \$354 per trip).
- Among travelers in the urban areas, frequent Wisconsin travel groups had an average group expenditure of \$332 and, on average, visited 12.72 times during the past three years. This group also comprises 80.3 % of those interviewed.
- The average 3-year value of an urban frequent visitor group is \$4,223 (12.72 trips x \$332 per trip).
- Among travelers in the rural resort areas, frequent Wisconsin travel groups had an average group expenditure of \$377 and, on average, visited 14.06 times during the past three years. This group also comprises 80.3 % of those interviewed.
- The rough average 3-year value of a rural/resort frequent visitor group is \$5,300 (14.06 trips x \$377 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, \$516 on average. This group comprises 19.7% of all travelers interviewed. Typically, they visited 1.17 times during the past three years.
- Among the infrequent travelers in the urban areas, the average number of trips was 1.08 during the past three years. On average, this group spent \$490 on this trip.
- Infrequent travel groups in the rural resort areas spent somewhat more on this trip than did the infrequent urban travelers. The average expenditure for this segment is \$543 for this trip and an average of 1.27 trips during the past three years.

Lodging and Travel Group Characteristics

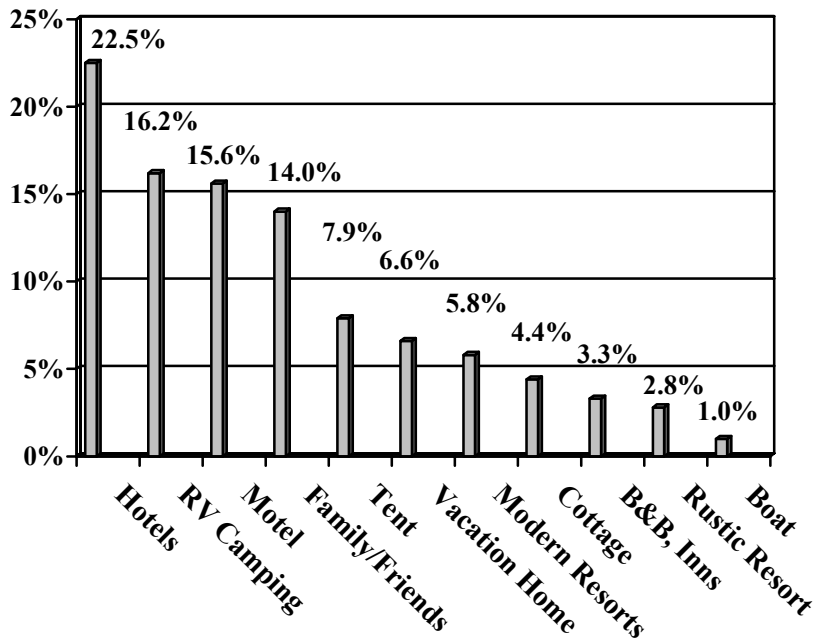
- Overall, the average overnight traveler group spent 2.9 nights.
- Travel groups in the urban areas spent 2.64 nights while those in the rural/resort areas spent 3.1 nights.

The following graphs display the lodging accommodations used by the overnight travelers in the urban and rural/resort areas separately.

Urban Lodging:



Rural/Resort Lodging



- One-third (30%) of the urban visitors had plans to travel outside of the area where they were vacationing while 36% of those in the rural/resort area said they had or would be traveling to other areas of the state while on their trip.

Travel Party Relationships

- Among the urban area travelers, the party composition was as follows: almost one-half (44%) of the travelers were in groups of two; groups of three comprised 13% and groups of four accounted for 17%. Just over one in ten (13%) were traveling alone. Among larger groups, 12% were in groups of between five and eight people. As groups often contained a mixture of relationships among members, percentages will be greater than 100%.

Urban Area Travel Party Relationships

Travel Party Composition	Percent of Mentions
Spouse	49.4
Child/Children	27.0
Friends	23.5
Alone	12.5
Extended Family	9.5
Significant Other	7.3
Grandchildren	3.3

Rural/Resort Area Travel Party Relationships

- Among the rural/resort area travelers, the party composition was as follows: almost one-half (46%) of the travelers were in groups of two; groups of three comprised 11% and groups of four accounted for 17%. Just under one in ten (9%) were traveling alone. Among larger groups, 15% were in groups of between five and eight people.

Travel Party Composition	Percent of Mentions
Spouse	61.4
Child/Children	26.7
Friends	19.2
Extended Family	12.0
Alone	9.1
Significant Other	7.3
Grandchildren	4.1

Trip Planning

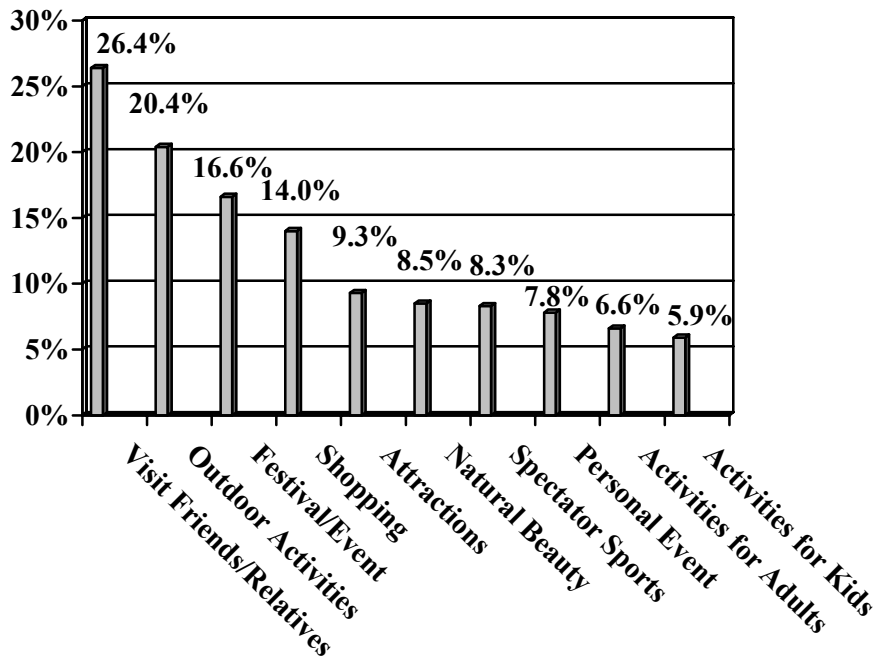
- Just over one-half (54.6%) of the urban visitors were short-term planners; travelers who indicated that they began planning for this trip during the month or the month before they traveled. The rural/resort areas had fewer short-term planners with 45.1% noted they made their plans the month of or the month before their trip.
- One-fifth (22%) of the urban travelers indicated they began their planning within the month they vacationed while only 12.6% of the rural/resort area visitors did so.
- Among longer-term planners in the urban areas, 34.6% indicated they planned their trip between 2 and 4 months in advance while in the rural/resort areas, 32.8% did so. In the rural/resort areas, one-fifth (22.1%) made their plans 5 or more months in advance compared to those traveling in the urban areas (10.9%).

Reasons for Choosing the Destination

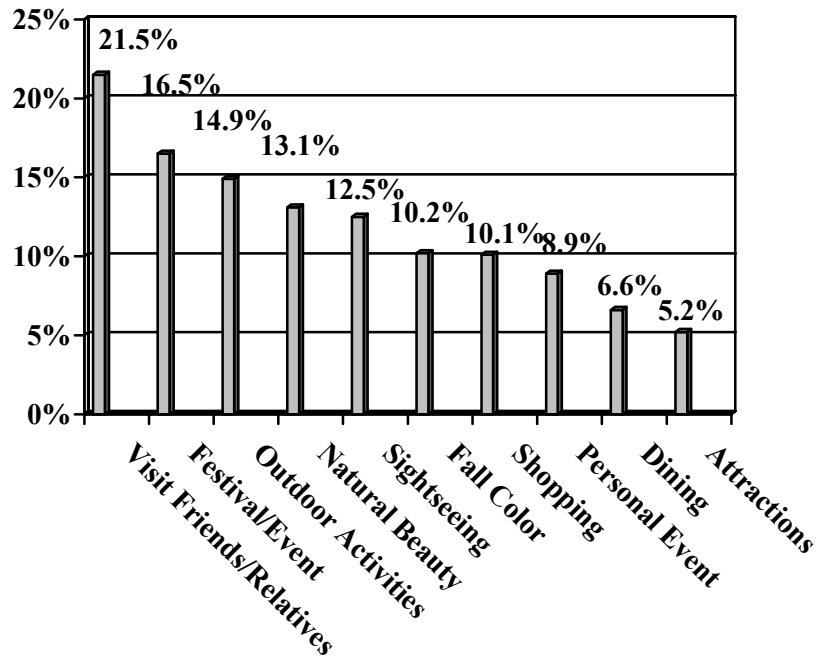
Travelers in each area were asked why they chose the specific destination for their vacation. There was very little difference between the reasons given by those traveling in the urban or rural/resort groups across all seasons.

The ten most frequently mention reasons are provided for both the urban and rural/resort areas in the following graphs.

Urban



Rural



Activities

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.

- For both the urban and rural/resort areas combined, the average number of activities noted was 3.6. Among travelers in the urban area, there were an average of 3.15 activities mentioned while the rural/resort area travelers noted 4.04.

Urban Activities

- The top five activities mentioned in the urban areas, regardless of season, include *dining*, noted 42.7% of the time, *retail shopping* (37.3%), *visiting friends and relatives* (25.5%), *festivals/events* (18%) and *visiting an exhibit or museum* (17.2%).
- The next set of five activities were comprised of *downhill skiing* (14.8%), *bars & nightlife* (14.1%), *relaxing with a spouse or significant other* (13.9%), *recreating with friends* (13.0%) and *visiting an attraction* (10.5%).

Rural/Resort Activities

- The top five rural/resort area activities include *dining*, noted 46.9% of the time, *retail shopping* (44.1%), *visiting friends and relatives* (24.5%), *relaxing with a spouse or significant other* (23.4%) and *attending festivals/events* (20.4%)
- The next five activities in the rural/resort areas are *sightseeing* (19.8%), *visiting an exhibit or museum* (18.5%), *hiking* (14.7%), *recreating with friends* (12.8%) and *fishing* (12.7%).
- Given there were more activities engaged in by travelers in the rural/resort areas, the following is the next tier mentioned. *Wildlife/nature watching* (12.6%), *visiting state or county parks* (12.5%), *fall color* (10.8%) and *bars & nightlife* (10.2%).

Trip Planning Sources

- On average, respondents noted 1.75 sources of information used in planning their trip.
- In the urban areas, travelers cited an average of 1.6 sources of information.
- The most frequently noted sources were *friends and relatives*, cited 46.9% of the time, followed by *local Internet* (20.2%) (e.g., chamber, CVB and other local sites), *other Internet* (11%) (e.g., news, weather, search engines, etc.), the *state Internet* (10.9%), and *brochures/publications* (8.3%).
- Among travelers in the rural/resort areas, there were slightly more sources cited, averaging 1.86.
- *Friends and relatives* were noted 51.4% of the time followed by *local Internet* (16.6%), *brochures/publications* (15.2%), *state Internet* (13.3%) and *other Internet* (8.9%).

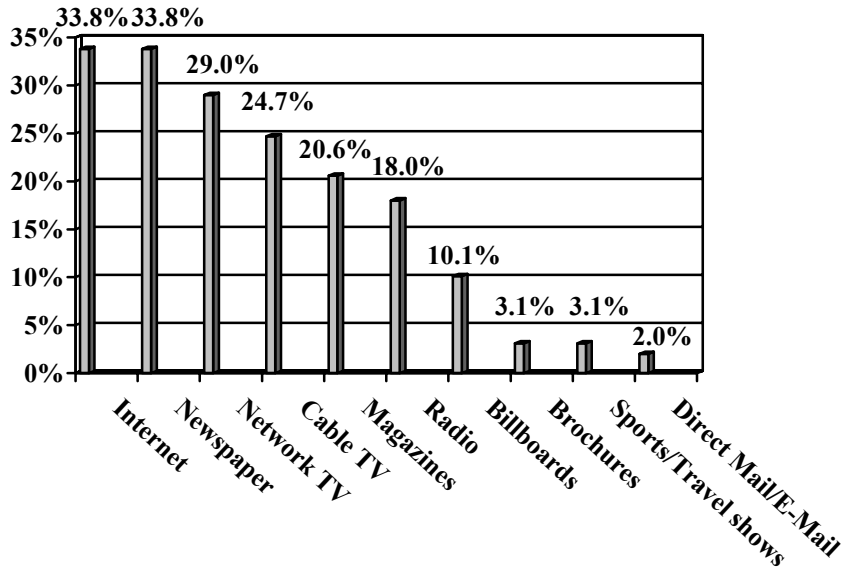
Respondents were also asked which information was **most useful** for planning their trip.

- In both the urban and rural/resort areas, *friends and relatives* were noted most frequently (34.9% and 34.8% respectively).
- In the urban areas, *local Internet sites* (13.8%) were followed by *other Internet sites* (5.8%), *state Internet* (5.0%) and *brochures/publications* (3.8%).
- Travelers in the rural/resort areas cited *local Internet* (7.9%), *state Internet* (6.3%), *brochures/publications* (5.6%), *other Internet* (4.1%) and *AAA resources* (3.5%).

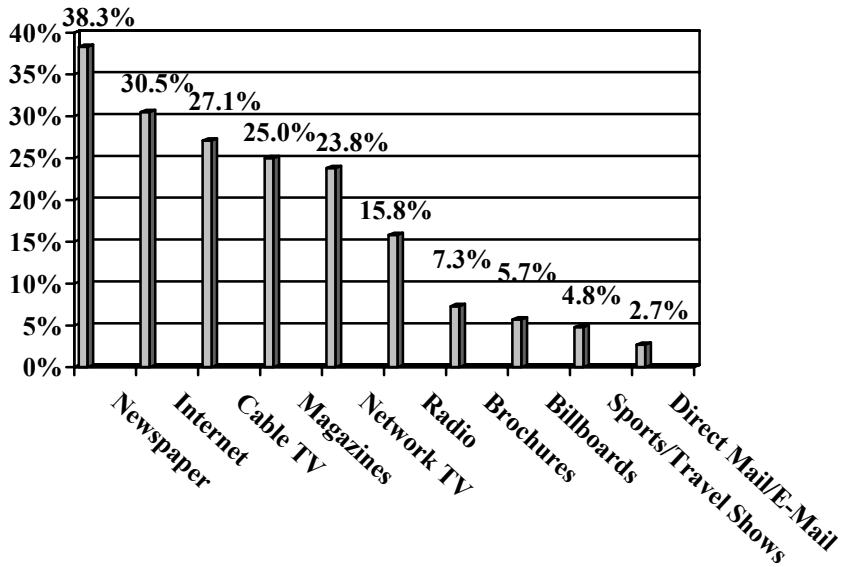
Advertising Recommendations

Survey participants were asked to suggest all of the best ways to advertise in order to generate awareness and motivate more people like themselves to vacation in Wisconsin.

Urban Traveler Advertising Recommendations



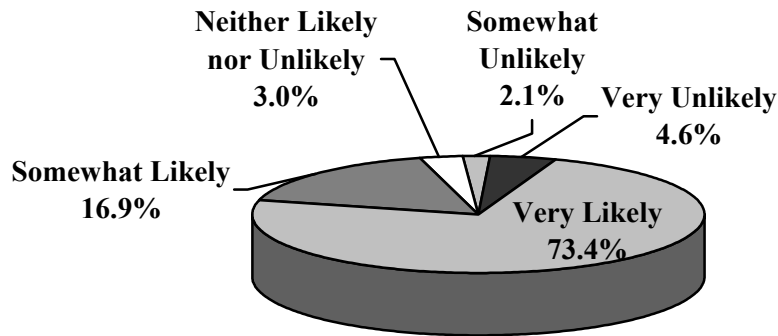
Rural/Resort Traveler Advertising Recommendations



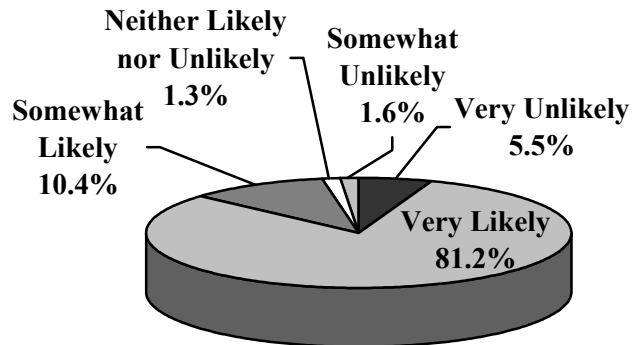
Future Wisconsin Vacations

Respondents were asked about the likelihood that they would return during the next 12 months for another Wisconsin vacation. While a clear majority were delighted with their experience and many travelers appear to have made the decision to vacation again, another 20% have not yet finalized their plans.

Urban Area Visitors Future Vacations



Rural/Resort Area Visitors Future Vacations



Those who were somewhat or very likely to vacation in Wisconsin were asked in which month or months they were most likely to vacation.

Vacation Seasons

- On average, travelers in both the urban and rural/resort areas 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.

Urban		Rural/Resort	
June	52.1%	June	57.6%
July	51.3	August	55.6
August	49.7	July	55.2
September	37.1	September	45.8
October	33.2	October	40.1
May	30.8	May	35.2
December	23.8	April	22.5
April	22.7	November	20.0
November	22.4	December	19.3
January	22.2	March	16.9
February	21.7	February	15.0
March	20.5	January	14.9

Wisconsin Vacation Recommendations

Over three-quarters (78.9%) of all travelers were very likely to recommend a Wisconsin vacation to friends or relatives, an additional 17.5% were somewhat likely to recommend Wisconsin. These two figures make for a combined total of 96.4%.

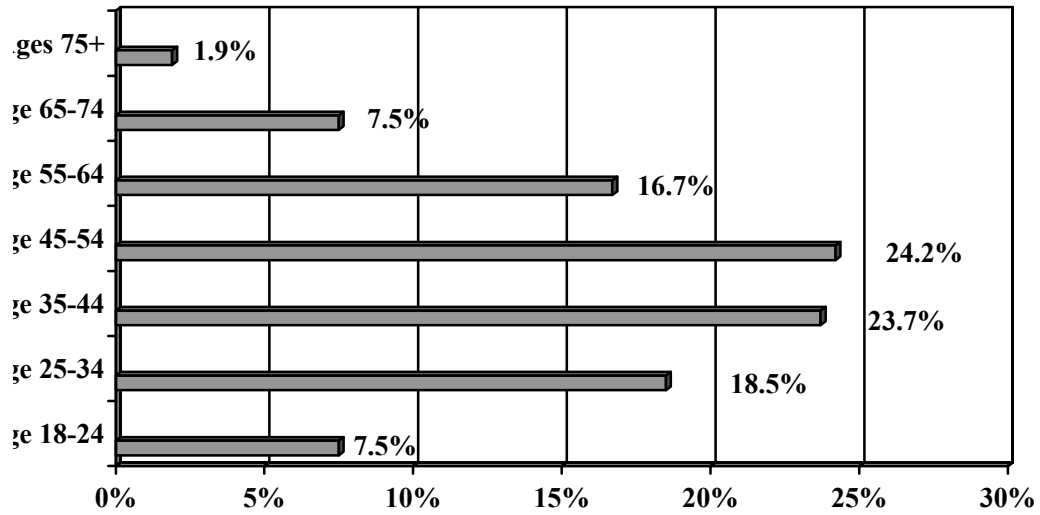
Seven in ten (71.2%) of the travelers in the urban areas said they were very likely to recommend a Wisconsin vacation to a friend or relative and an additional 23.3% were somewhat likely to do so; a total of 94.5%.

Those vacationing in the rural/resort areas provided a higher percentage of very likely to recommend (86.6%) and with an additional 11.7% stating they were somewhat likely; a total of 98.3%.

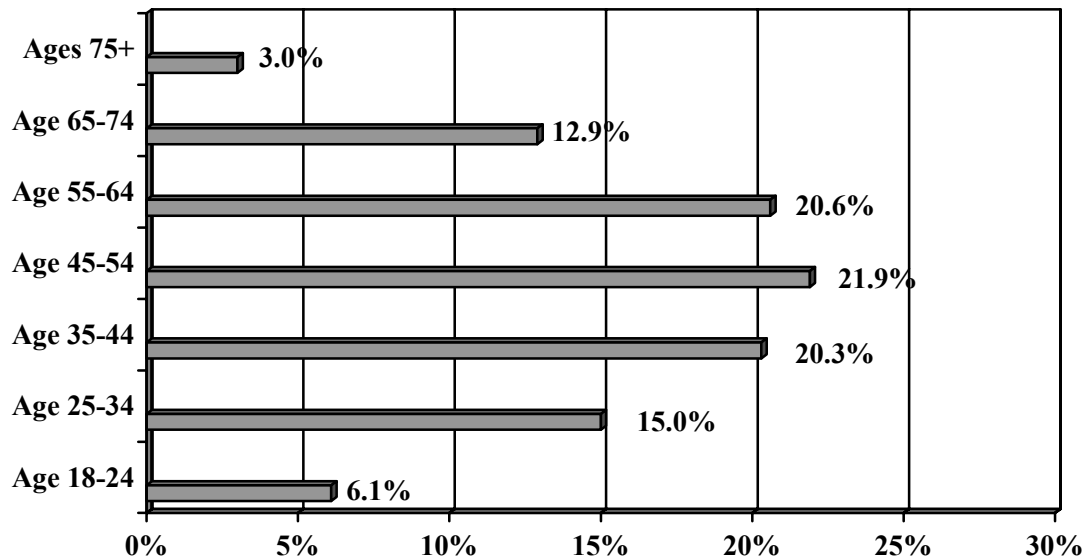
Demographics

The majority of travelers in both the urban and rural/resort areas are very similar in ages and tend to be centered around the 25 – 54 year old age groups. Those in the urban areas were slightly younger than those in the rural/resort areas. The following graphs provide the distribution for each area.

Urban

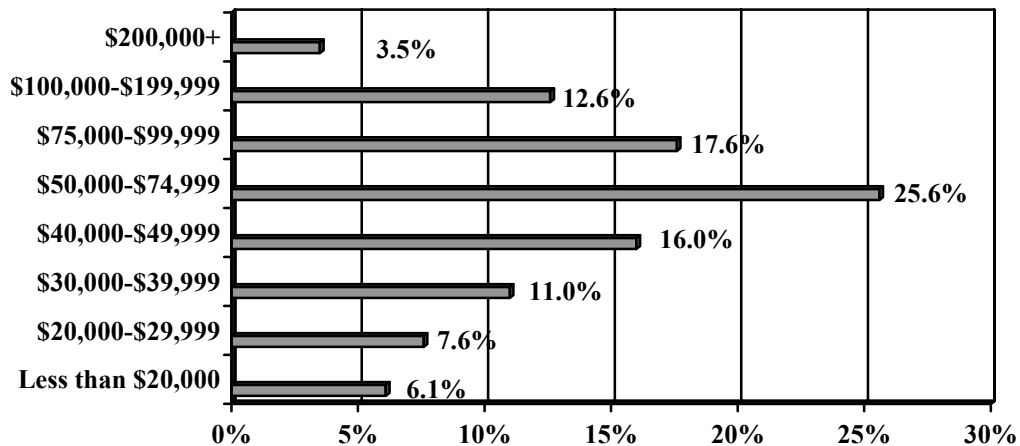


Rural/Resort

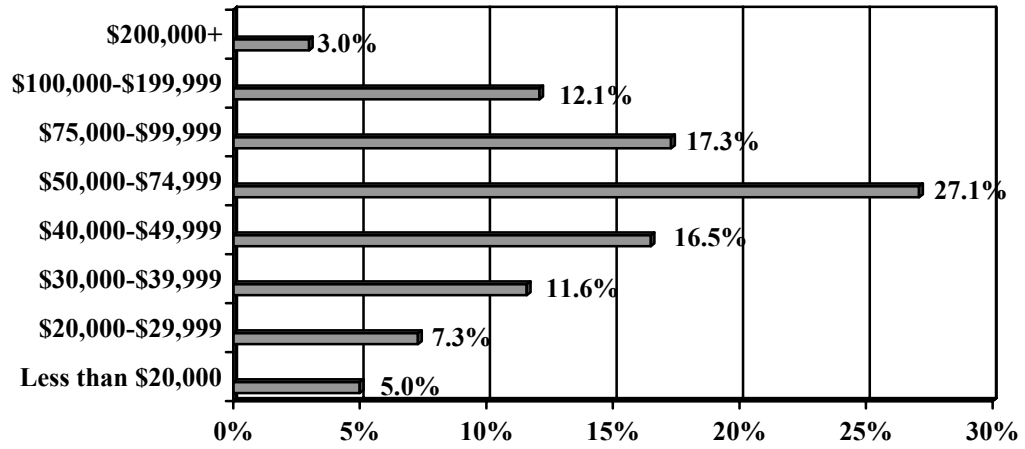


- The urban areas had slightly more travelers from households with kids under 18 living in the home (36.1%) than that found in the rural/resort areas (33.5%).
- Among urban visitors who had kids living in the home, their ages are as follows: 0-2 were mentioned 13.1% of the time, 3-5 years old (23.5%) and 6-11 years old (46.3%).
- Among the households of urban travelers that included older children/young adults, kids between the ages of 12-15 were mentioned 39.5% of the time and young adults 16-18 years old (24.7%).
- Those in the rural resort areas with children in the household had children who were slightly younger than those traveling in the urban areas. Children 0-2 were mentioned 14.4% of the time, 3-5 years old (27.6%) and 6-11 years old (50.8%).
- Rural/resort visitors with older children/young adults showed that kids between the ages of 12-15 were mentioned 38.9% of the time and young adults and 16-18 years old (21.8%).
- Education levels of travelers in the urban areas were slightly higher than those found in the rural/resort areas. Six in ten (57.8%) in the urban areas had a college degree or greater education while just over one-half (51.3%) among the rural/resort travelers did.
- Among those in the rural/resort areas, 22.7% had some college or were currently attending compared to 20.6% in the urban areas.

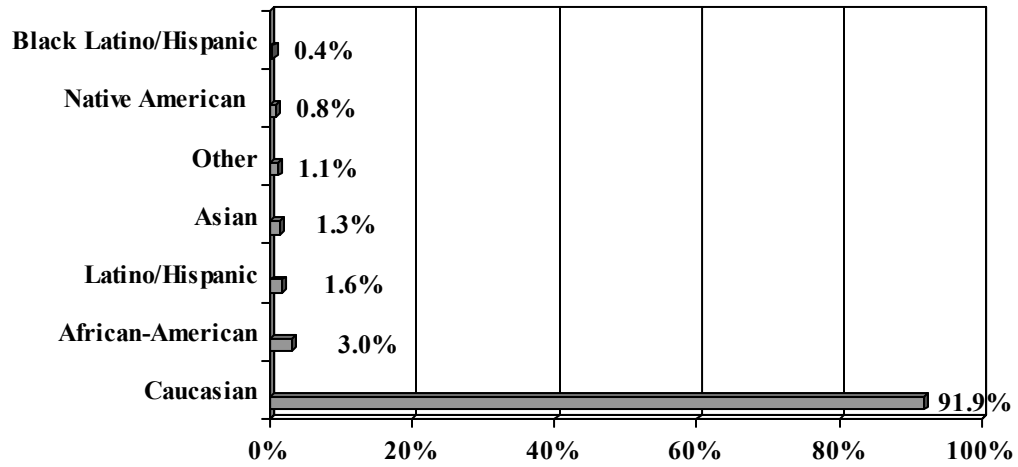
Urban Area Traveler Incomes



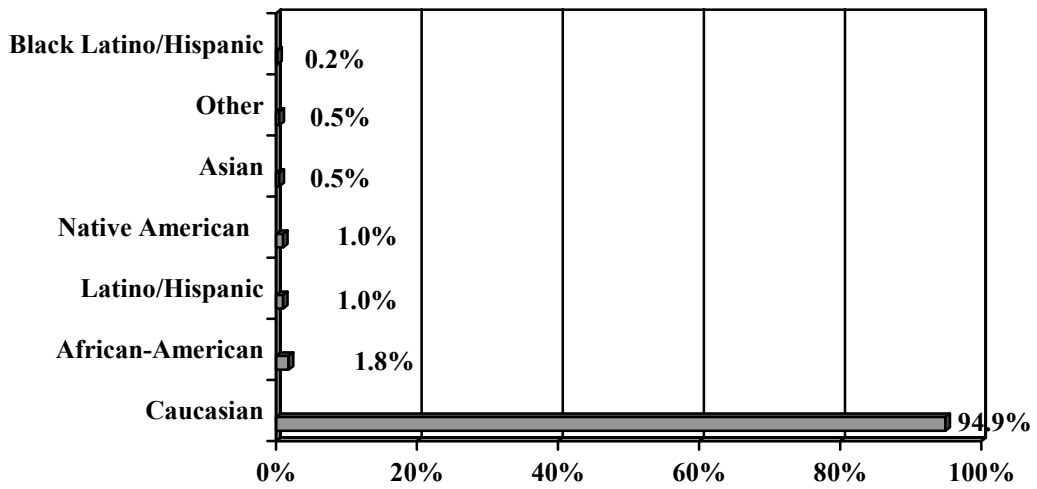
Rural/Resort Area Traveler Incomes



Urban Area Traveler Ethnicity



Rural/Resort Area Traveler Ethnicity



Marketing Opportunities

Given the high percentage of Caucasian travelers in either urban or rural/resort areas, extending invitations to the non-Caucasian segments of the market is a growth opportunity.