2010 Visitor Study for Green Lake, Marquette, and Waushara Counties

Final Report – November 8, 2010

Prepared for the Tri-County Tourism Alliance

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November 8, 2010

To: Tri-County Tourism Alliance Board Members

RE: FIRST DRAFT OF 2010 VISITORS STUDY

Enclosed is the final report for our study of visitors to Green Lake, Marquette and Waushara Counties this past summer.

To the best of our knowledge, this is the first time that a study of this type has ever been conducted for the region. With 1,000 people participating in the study, we feel that we obtained a sufficient survey sample to give an accurate profile of visitors to the area and are pleased with the results.

Our research has also generated a benchmark profile of tourism in the area and the following report makes several recommendations for increasing tourism in the Tri-County region. Further, based on the results of this study, we recommend that a comprehensive marketing plan should be developed, and this study includes recommendations for several items that should be included in that plan.

It should also be noted that this study is only the first step in increasing tourism in the Tri-County area. Similar studies should be conducted every few years to ensure that progress is being made towards the goal of increasing visitors to the region and attracting a good mix of visitors.

Thank you for allowing us to conduct this project to help increase tourism in the Tri-County area, and it was a pleasure working with the Tri-County Tourism Alliance. If you have any questions, comments, or concerns, please do not hesitate to contact us.

Sincerely,

Bob O'Donnell	Mark Manske	Brandon Narveson
SBDC Director	Faculty Team Advisor	Student Team Leader
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Table of Contents

Executive Summary

To aid the Tri-County Tourism Alliance (TCTA) in developing a marketing plan, the Small Business Development Center (SBDC) at the University of Wisconsin Oshkosh conducted a visitor study during the summer and early fall of 2010. The study was conducted by a team of student interns with a faculty advisor, under the supervision of the SBDC staff.

The student team completed about 600 surveys at events, campgrounds, and tourism businesses which gathered information from over 1,000 individuals. Based on their analysis of the survey data, the following are some key points to consider in developing a comprehensive marketing plan for the Tri-County Tourism Alliance:

- **Visitor Demographics** - visitors to the area are evenly balanced between men and women with the vast majority of visitors being in the 30 to 60 year-old age range. Children and seniors represent a relatively small portion of area visitors. Marketing message should reflect this.

- **Repeat Visitors** - majority of non-local visitors are repeat visitors attending events. While in the area, their top activity choices also include food & dining, lake-related activities, shopping and fishing/hunting. These activities should be reflected in marketing of the "visitor experience."

- **Market Position** - the "peaceful nature and beauty" of the region is the most commonly cited reason for vacationing in the area followed by the opportunity for lake-related activities and the overall atmosphere of the area including its friendly people. This position in the mind of the customer should be reinforced by the positioning strategy and marketing message.

- **Opportunities for Improving Visitor Experience -** most commonly-cited opportunities for enhancing the visitor experience included improving local events, and more shopping and dining opportunities. These should be considered in local economic development efforts.

Opportunities for improving the marketing to both non-resident and resident visitors include:

- **Improve Access to Event and Activity Information** - the Tri-County Tourism Alliance web site needs more accurate and up-to-date information on area events and activities. That information should also be systematically shared with the Wisconsin Department of Tourism.

- **Trip Planning Service** - the Tri-County Tourism Alliance web site should be expanded to include a "build-a-trip" feature that makes it easy and convenient for people to quickly plan and take a vacation in the Tri-County area.

- **Improve the Web Sites of Local Tourism Businesses** - the Tri-County Tourism Alliance should help local tourism businesses improve their websites to more effectively market both their products and services, and the Tri-County area's events and activities.

- **Improve Local Events** - The Tri-County Tourism Alliance should help local event organizers improve their events by coordinating their marketing efforts with other area events and local tourism businesses, and improving items such as parking at event sites.

Introduction

Basis for Study

Tourism, particularly in the summer months, is a major component of the economy of the Tri-County Area which includes Green Lake, Marquette and Waushara Counties. During the summer of 2008, there was significant flooding in major portions of the Tri-County region which had a serious negative impact on the region's tourism industry and businesses. In 2009, there was anecdotal evidence that the region was struggling to return to its pre-2008 level of visitors to the region, particularly with the national economic downturn.

Purpose and Scope

To aid the Tri-County Tourism Alliance in developing a marketing strategy to increase local tourism, the UW Oshkosh Small Business Development Center proposed conducting a visitor study during the summer and early fall of 2010 with funding from a disaster assistance grant from the U.S. Small Business Administration. The study sought to answer two critical marketing questions: 1) where are visitors to the area coming from, and 2) why are they coming to the area.

One of the additional goals of the study was to create information points or "benchmarks" that could be used to measure the progress of the Tri-County Tourism Alliance's marketing strategy. The Small Business Development Center assembled a team of students and a faculty advisor which created survey forms for both visitors and local residents, and developed a schedule of in-person surveys at tourism events throughout the three-county region.

The student intern team completed about 600 surveys during more than 15 local events (i.e. fairs, parades, etc.), and at several campgrounds, and tourism businesses. The purpose of the surveys was to determine both where people at the survey sites had come from and why, but also their impressions of the area and suggestions for improving its appeal to visitors.

The data collected from over 1,000 individuals included the demographics (age, gender, etc) of the visitor, what other area activities they were taking part in, and what they liked and disliked about the area. The following report not only considers the results of the surveys, but analyzes the data collected so it can be used to help develop and implement a marketing strategy. The detailed results and conclusion section follows the data analysis.

The study is also recommending that several specific steps be taken to increase tourism in the Tri-County area. These recommendations are based on collected data from visitors, additional comments mentioned by those participating in the survey process, and general observations by team members.

In the Appendix section, there is more in depth data including the tables that were used to develop the study's graphs. There is also additional information that was used in the study. Lastly, the Appendix contains summaries of other successful marketing plans that were used to take advantage of tourism improvement opportunities similar to Tri-County.

Introduction (cont.)

Research Assumptions

- Individuals being surveyed gave accurate and honest responses to the questions being asked.
- There are a proportionate number of people being surveyed in regards to sex, age, ethnicity, etc. to eliminate any potential bias in the results.
- The survey was conducted in the same manner for each individual completing the survey.
- There are a proportionate number of events from each county to eliminate any potential bias from one county having more weight than another.

Research Limitations

- Surveys were conducted only at events that occurred during July, August and September.
- Surveys were conducted at events selected with input from various members of the TCTA.
- The percentage basis of people surveyed was not always consistent from one event to the next based on the nature and size of the event.

Other Research-Related Factors

- In addition to surveying at events, the survey team met with several individual businesses to talk to them about tourism and asked for their help in gathering data for the study.
- The survey team made it to the majority of larger communities in the three-county region.
- The team obtained the cooperation of several businesses that had customers fill out surveys.

Research Methodology

Before the team could start surveying, a database was developed to determine what would be the most beneficial events to conduct surveys at, along with a list of local businesses that should be contacted to gather supplemental data from. The information for the database came from several different sources including web sites, magazines, and travel brochures.

Three different survey forms were developed for this study. One was designed to collect data at events from non-local residents. A second form was designed to collect data at events from local residents. The majority of the data collected for the study used one of these two forms.

The events chosen for these surveys were selected based on their size in terms of attendance and the estimated percentage of non-local resident visitors attending the event. The team tried to focus on events with the greatest number of non-local visitors. At the events, there was no particular pattern as to whom the team asked to complete a survey.

Event attendees were approached by a member of the survey team. After the surveyor explained who they were affiliated with and what the goal of the project was, they would proceed to ask the event attendee if they would be willing to take a quick five minute survey. If they agreed, which

most people did, the surveyor would ask if their permanent residence was in Green Lake, Marquette, or Waushara County.

Based on the answer to that question, the team member would administer either the local or the non-local survey and ask the remaining questions. Gender, age, and ethnicity had no influence as to who was asked to complete a survey. However, someone in the party over the age of 18 was asked to take the survey for everyone in the party including those under the age of 18.

A third, simpler survey form was developed for local tourism businesses to hand out to their customers. This survey was mostly used at accommodation businesses (hotels, motels, etc.) and restaurants, and only asked where a visitor was from and why they were visiting the area.

For this portion of the study, a member of the survey team approached individual businesses and explained the visitor study to the owner, who was then asked if it would be okay to leave some surveys behind to have their customers fill out. The surveys were then picked up a few weeks later.

Research Study Terms & Definitions

University of Wisconsin-Oshkosh Small Business Development Center (SBDC) – The SBDC is funded by the U.S. Small Business Administration and the University of Wisconsin Extension. The UW Oshkosh SBDC serves the needs of entrepreneurs and businesses in Fond du Lac, Green Lake, Marquette, Outagamie, Sheboygan, Waushara, and Winnebago Counties

Tri-County Tourism Alliance (TCTA) – Made up of representatives of Green Lake, Marquette, and Waushara Counties, the Alliance's goal is to promote and increase tourism in the region. The TCTA's mission statement is "to inspire visitors to come to the region by promoting original and authentic experiences that encourage people to share their memories and return to create new ones." The TCTA board consists of three members from each of the participating counties.

Local Visitor – someone who has a permanent residence in Green Lake, Marquette, or Waushara County

Non-Local Visitor – someone who does not have a permanent residence in Green Lake, Marquette, or Waushara County

Group – any number of people who come to an event or location together

**Event** – any occasion, such as a parade, fair, etc. that brings people together in a group

Benchmark – Information gathered at a certain point in time used for future analysis and comparison

Data Analysis

The following analysis of survey data was done using the *Qualtrics* computer software. Using the program, the survey team was able to create an electronic version of the survey forms, and then enter data from the hard copies into the electronic form. Once all the data was input, the team was able to filter it to display and analyze the results to specific questions.

The filtered and analyzed data was then exported to Microsoft Excel which was used to create the graphs in this report. The graphs are color coded to help interpret them. Yellow background fill indicates Non-Local Visitor data. Green background fill indicates Local Visitor data. Blue background fill indicates combined Non-Local and Local Visitor data. For more detailed statistical information, please refer to the appendix.

Visitor Demographics - Local and Non-Local Visitors - Gender
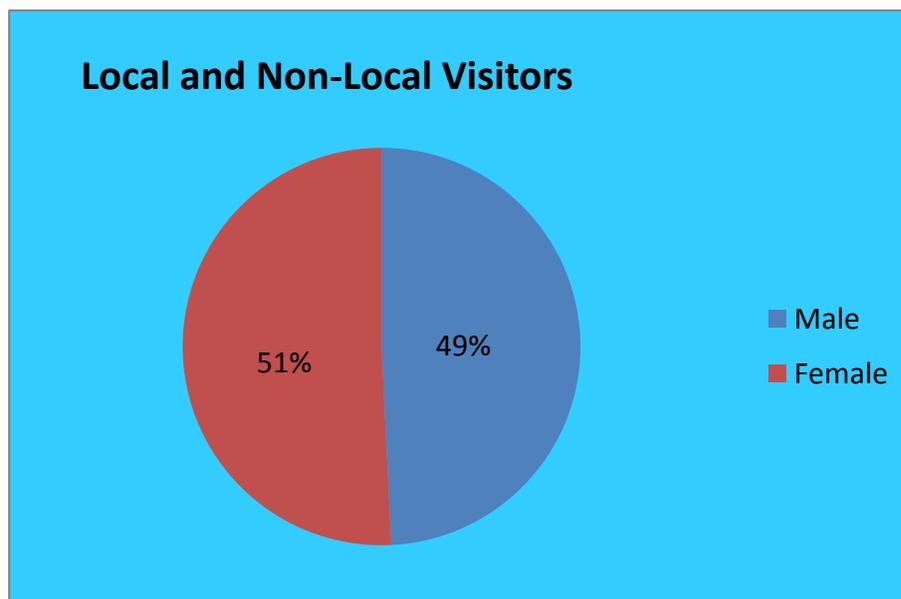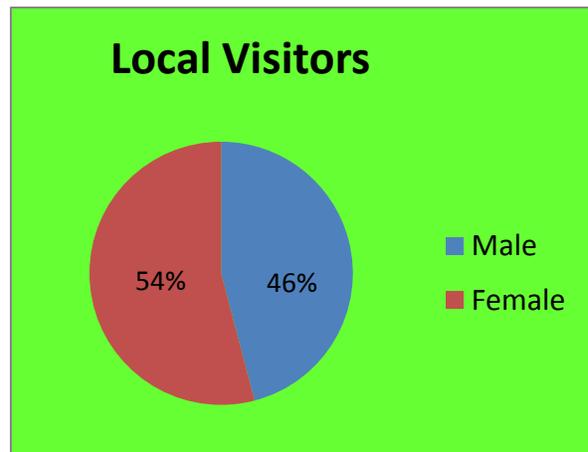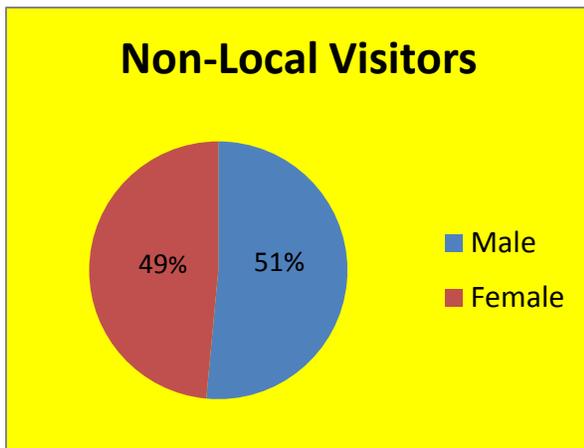
Visitor Demographics - Local and Non-Local Visitors - Age

The age group consisting of people between the ages of 30 and 60 years old greatly outweighed the other two age groups. This is true for all three graphs, but is especially true for the Non-Local Visitors. When advertising outside of the Tri-County area, it is important to keep in mind the targeted age group, and what age group is actually in attendance at events.

Non-Local Visitors

18%
23%
59%

■ Under 30 ■ 30-60 ■ Over 60

Local Visitors

19%
31%
50%

■ Under 30 ■ 30-60 ■ Over 60

Local and Non-Local Visitors

18%
26%
56%

■ Under 30 ■ 30-60 ■ Over 60
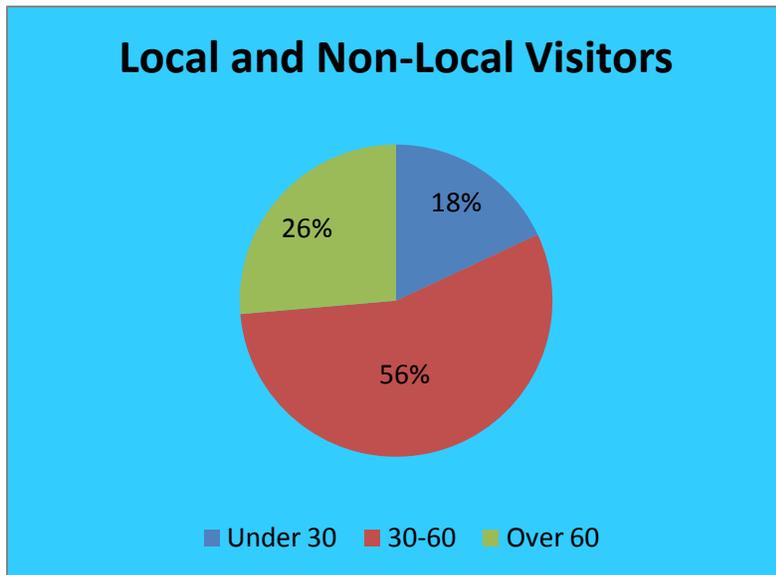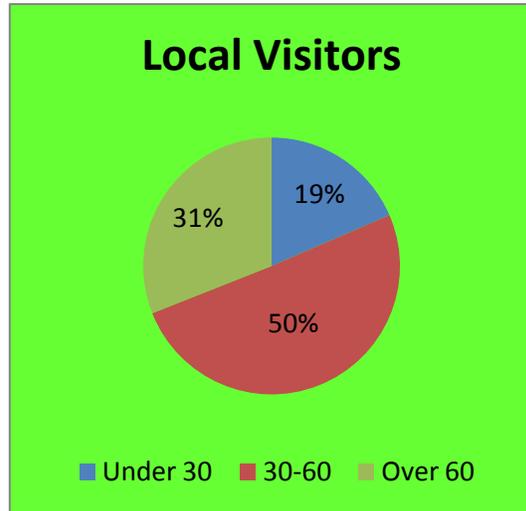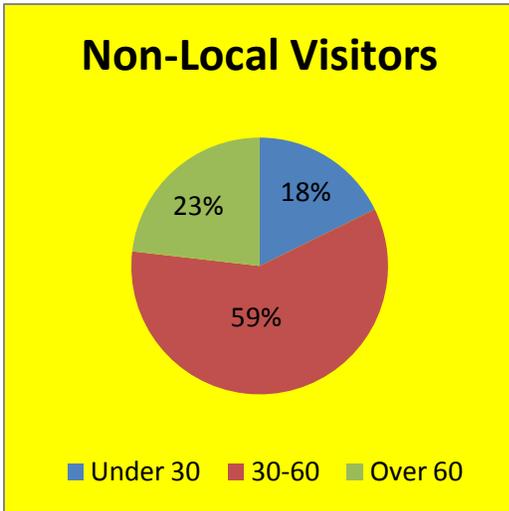
Visitor Profile - Local and Non-Local Visitors – First Time to Event

The below graphs illustrate what portion of people attending Tri-County area events for the first time, and which are returning visitors. As can be seen below, there is a greater percentage of non-locals coming to the area's event for the first time. Of the non-locals, 65% are returning guests. This statistic indicates that once people have attended an event; there is a good chance that they will come back. In light of that trend, marketing and advertising dollars may be best spent on getting potential visitors to come to the area for the first time.

Non-Local Visitors

35%

65%

■ Yes ■ No

Local Visitors

23%

77%

■ Yes ■ No

Local and Non-Local Visitors

30%

70%

■ Yes ■ No
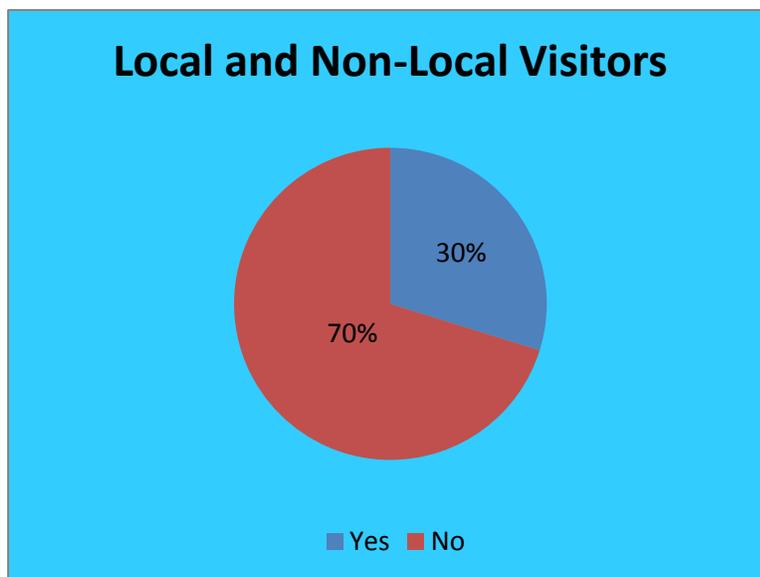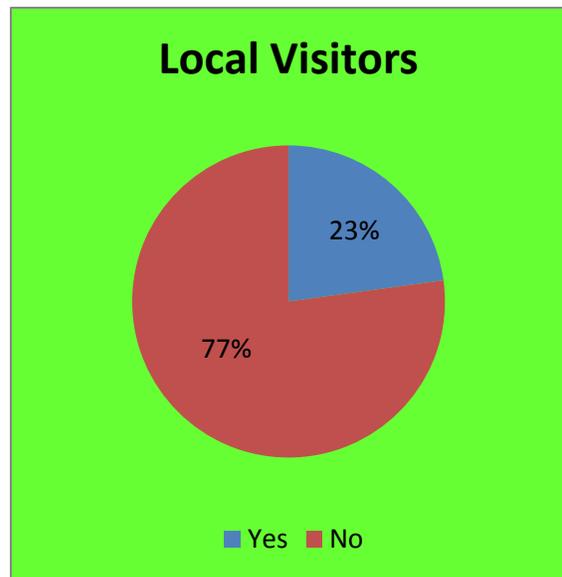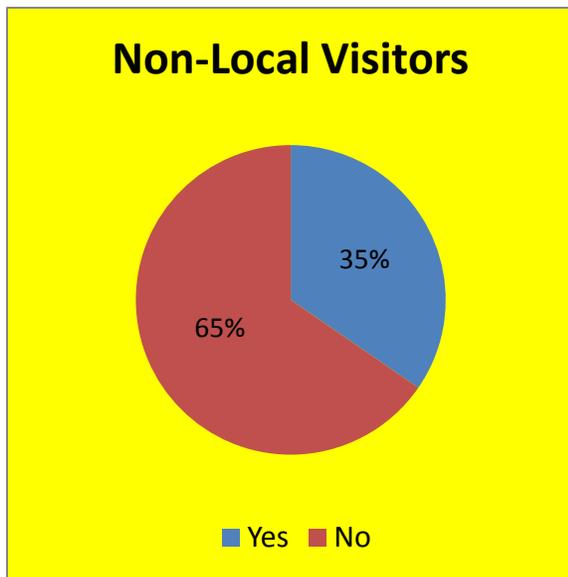
Visitor Profile - Non-Local Visitors - What is Their Primary Reason for Coming to the Area?

For non-local visitors, the top reason for visiting the area was a specific event followed by food & restaurants and visiting friends and family. A recent study by the Wisconsin Department of Tourism on why certain destinations are popular for tourists identified the top motivators as: 1) having fun, 2) rest and relaxation, and 3) visiting family and friends.

Non-Local Visitors

A bar chart showing the primary reasons non-local visitors come to the area:
- Events: ~26%
- Food & Restaurants: ~13%
- Visit Family & Friends: ~12%
- Camping: ~11.5%
- Vacation or Getaway: ~9.5%
- Summer Home or Property: ~9%
- Lake & Water-Related Activities: ~6%
- Outdoor Sports: ~3%
- Other: ~10%
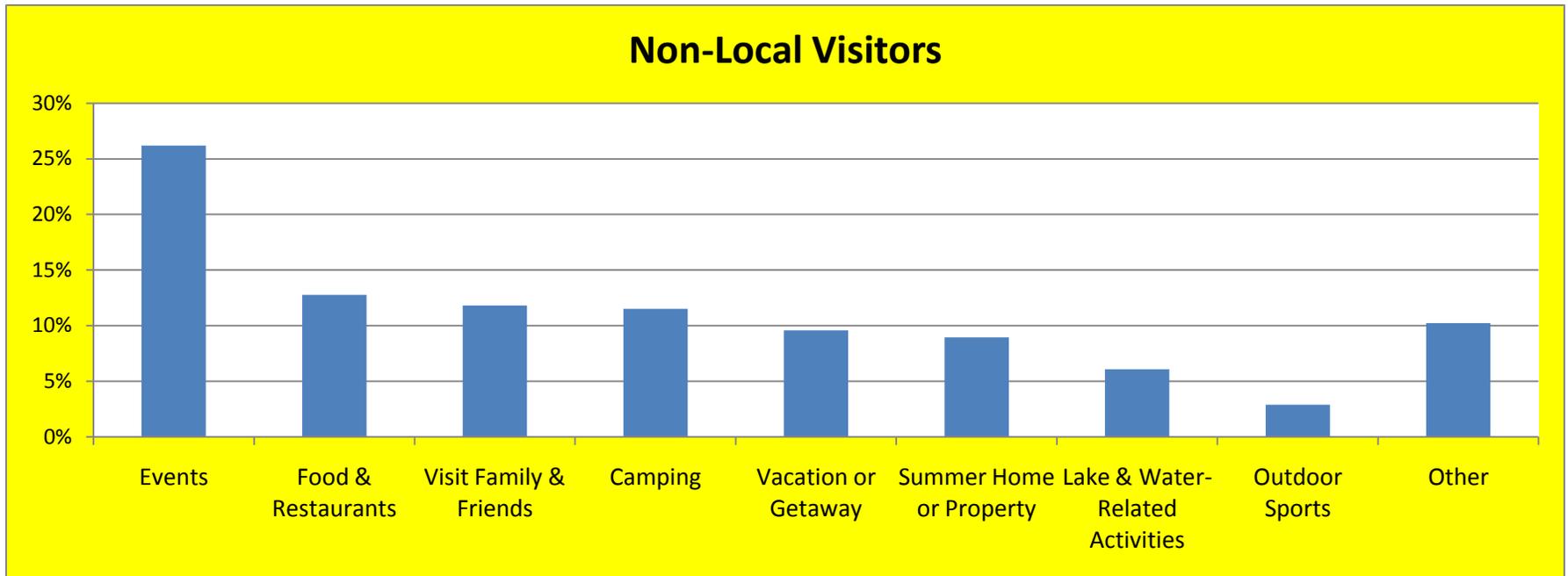
Visitor Profile - Non-Local Visitors - Other Activities While in the Area

In addition to their primary reason for visiting the Tri-County area, the top three activities for non-local visitors involved food & dining, lake activities (i.e., swimming, boating, etc.), and shopping in the Tri-County area.

Non-Local Visitors

Activity	Percentage
Food & Dining	~25%
Lake Activities	~18%
Shopping	~17%
Fishing/Hunting	~15%
Other	~13%
Outdoor Sports	~8%
Golfing	~4%
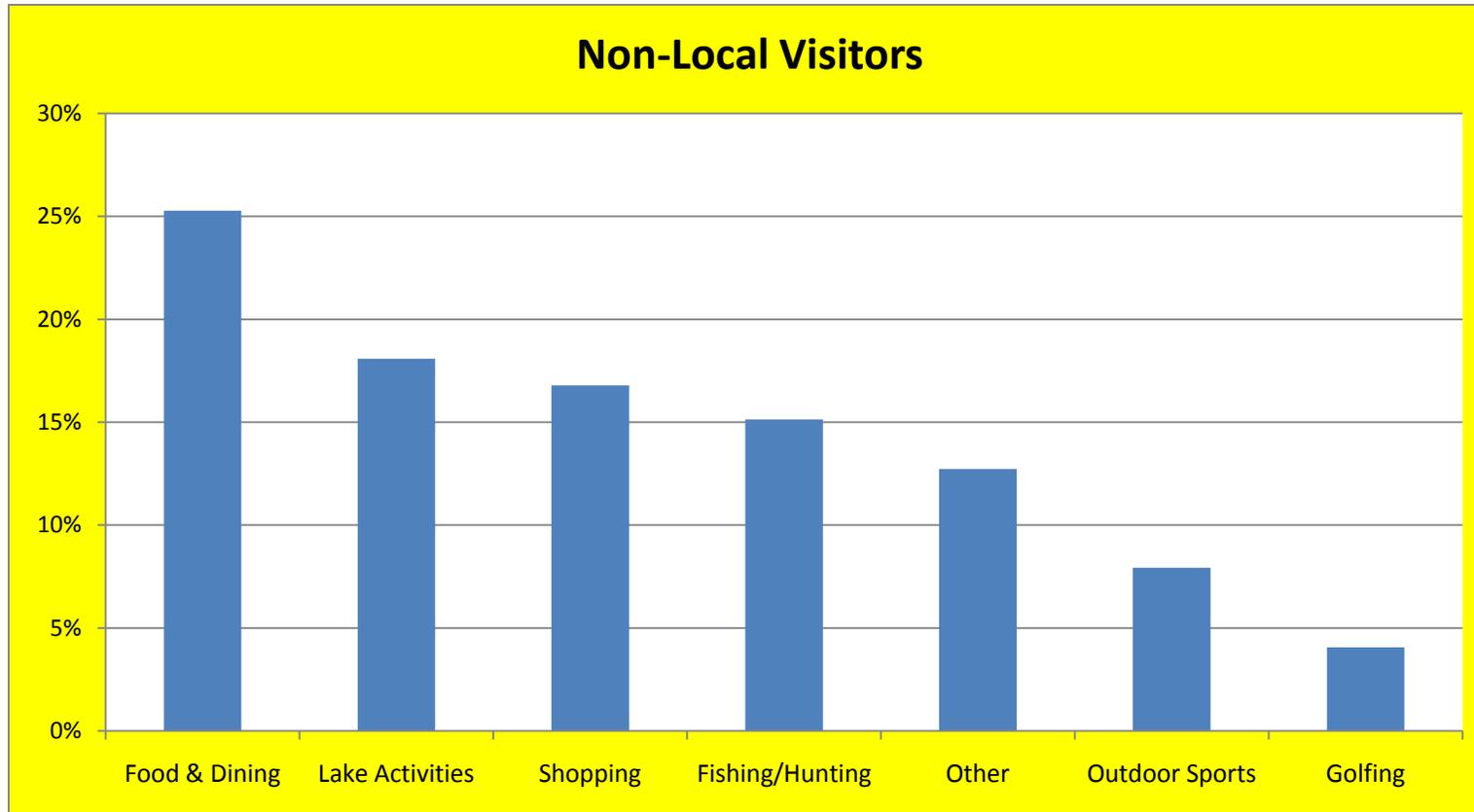
Visitor Profile - Non-Local Visitors - What Do You Like About Vacationing Here?

Visitors are attracted most by the beauty of the area, and the activities they can take part in the area's lakes. Both of these items are among the top motivators for people to visit Wisconsin according the study by the Wisconsin Department of Tourism cited previously.
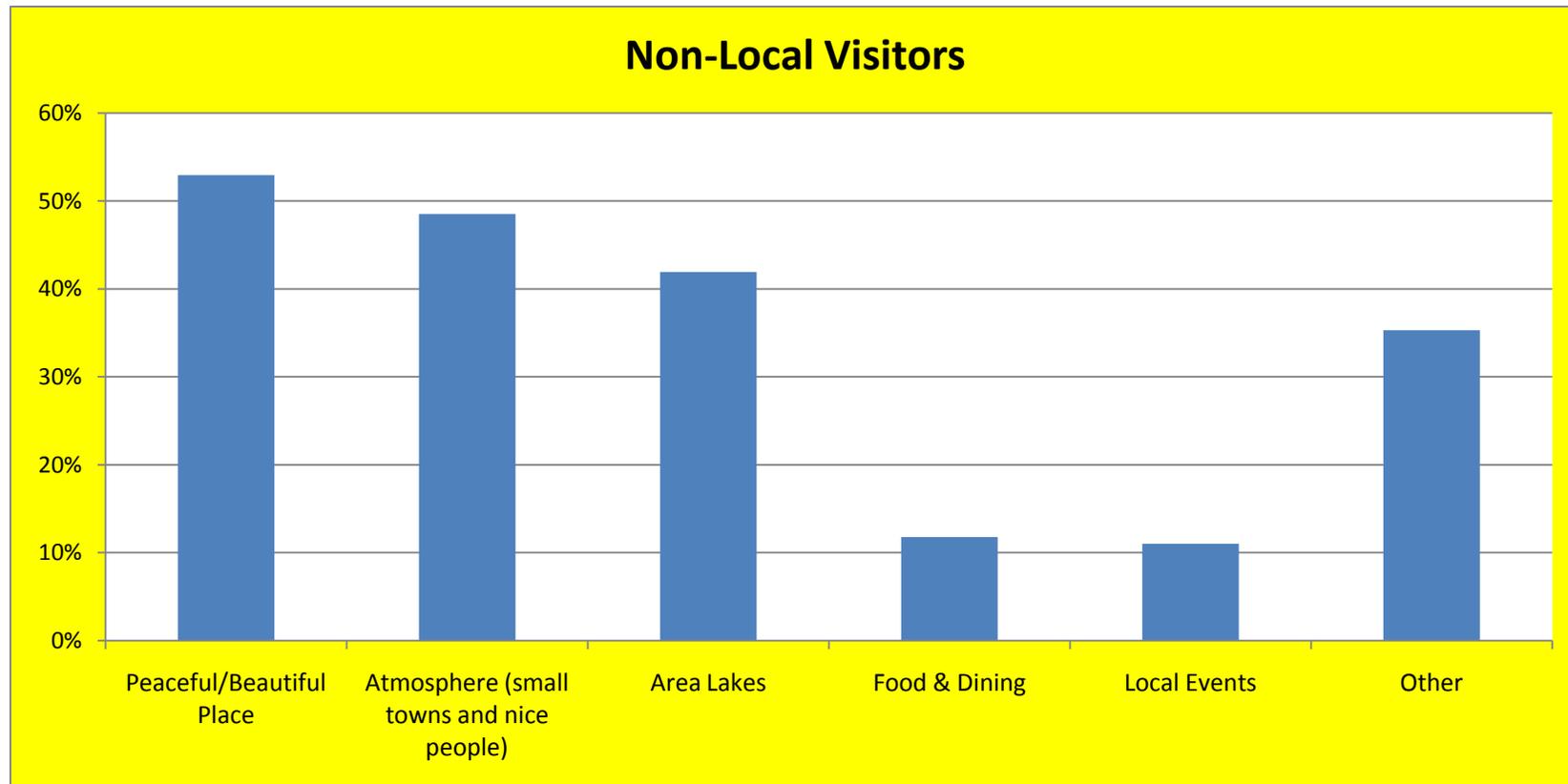
Visitor Profile - Local Visitors - What Should Be the Top Attractions for Non-Local Visitors?

In surveying local visitors, which included residents attending local events, we asked survey participants what they thought would draw non-local visitors to the Tri-County area. Most of those surveyed believed that people would come to the area because of the lakes/water activities and specific events. That data coincides with what the non-local residents said. However, fewer local visitors mentioned food and dining. This may be due to the fact that a majority of non-local visitors were planning on eating out at least one meal, there were very few local visitors that mentioned anything about eating out.

Local Visitors (including Residents)
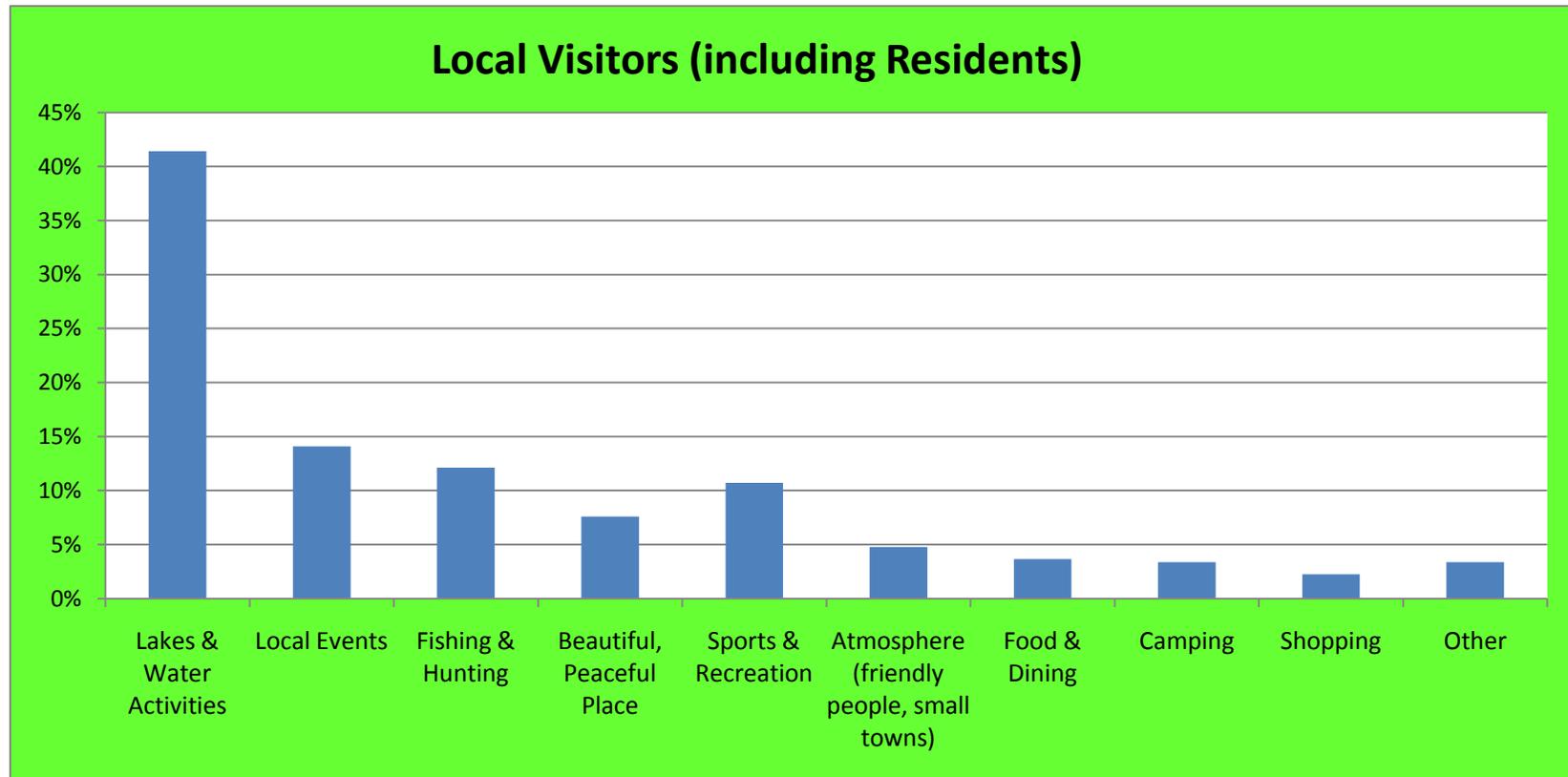
Visitor Profile - Non-Local Visitors - What Do You Dislike About Vacationing Here?

From the data that was collected, there were not a lot of major complaints. Most of the dislikes fell under the category of general improvement of an event and more business development with no single complaint cited by more than 14 survey participants.
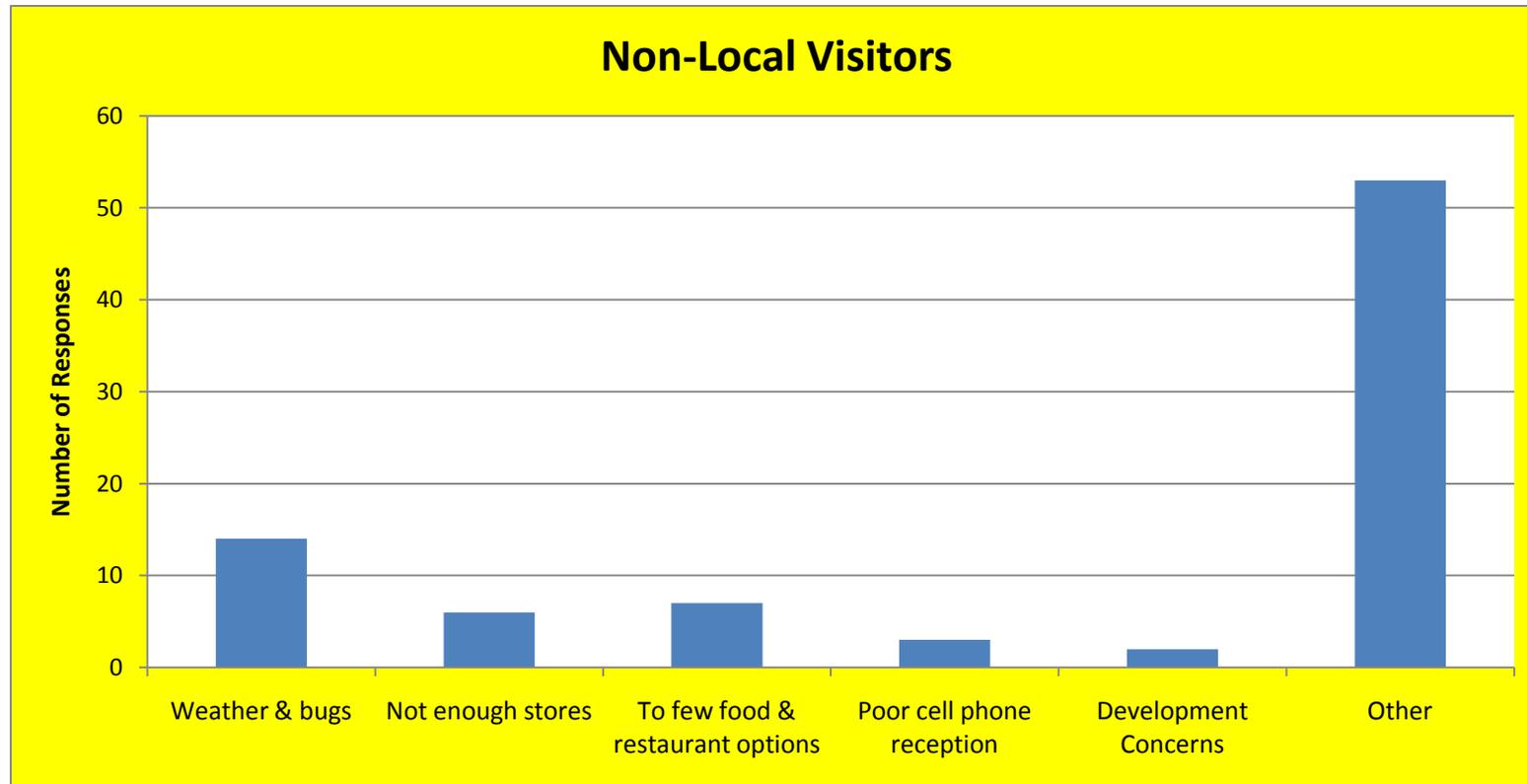
Visitor Profile - Non-Local Visitors - What Type of Accommodations?

The single largest category of accommodation for non-local visitors was Tri-County area campgrounds (34%), followed by vacation/rental cottages (22%) and family or friends (14%). Just 11% of those surveyed were staying in a hotel or motel. In a related note, according to a study done by the Wisconsin Department of Tourism in 2005, only 24% of the campers in Southeast Wisconsin, a region which includes the Tri-County area, were under the age of 38, and only 3% under the age of 22.

Non-Local Visitors bar chart showing percentages by accommodation type: Campground ~34%, Vacation Rental/Cottage ~22%, Hotel/Motel ~11%, Summer Home ~11%, Family & Friends ~14%, Other ~8%.
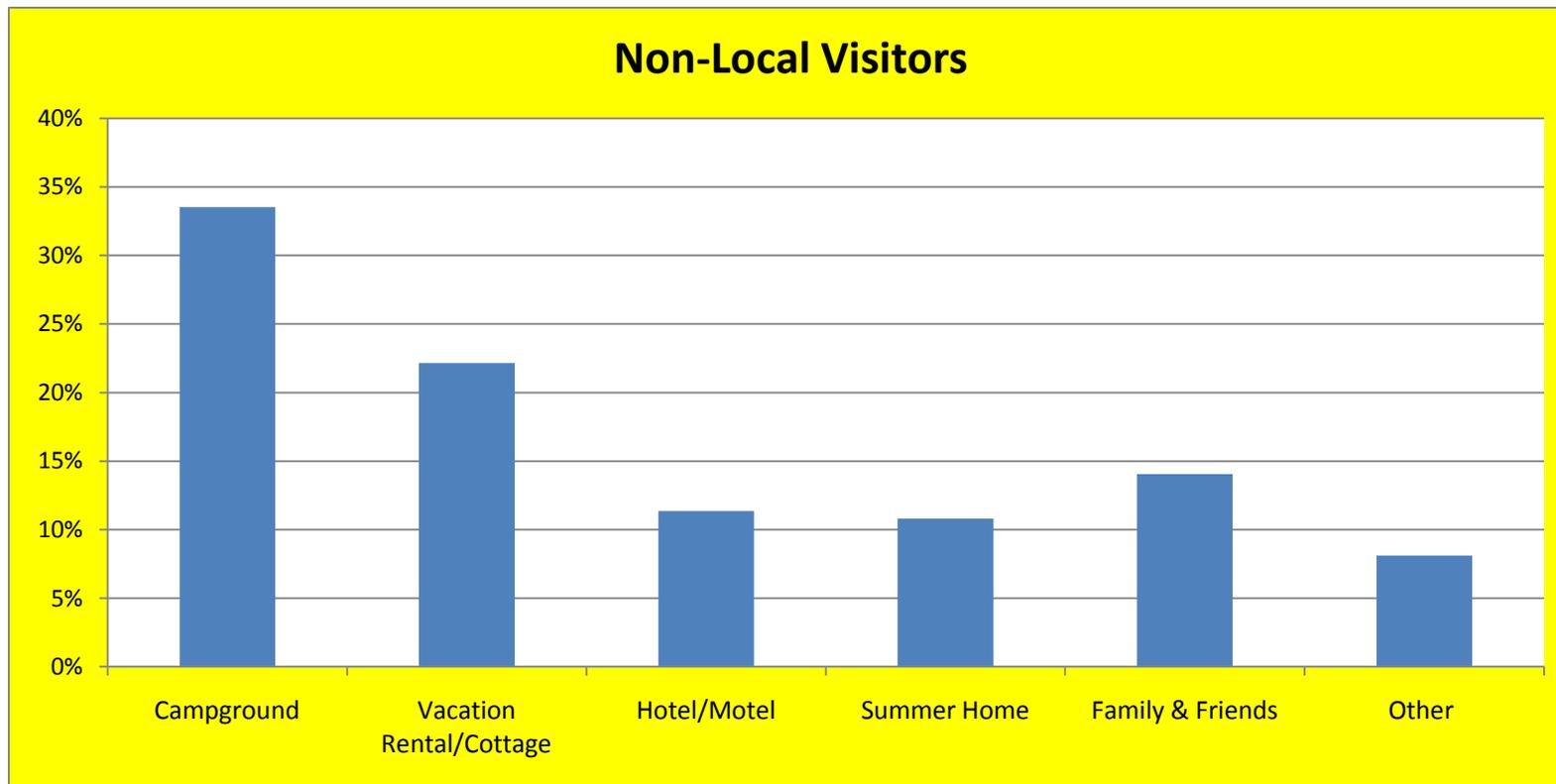
Visitor Profile - Non-Local Visitors – Length of Stay

Non-Local Visitors - Non-Campers

- 8+ Days
- 4-7 Days
- 2-3 Days
- 1 Day
- Seasonal Resident

4% 2% 14% 26% 54%

Non-Local Visitors - Campers

- 4-7 Days
- 2-3 Days
- 1 Day
- Seasonal Resident

2% 7% 39% 52%
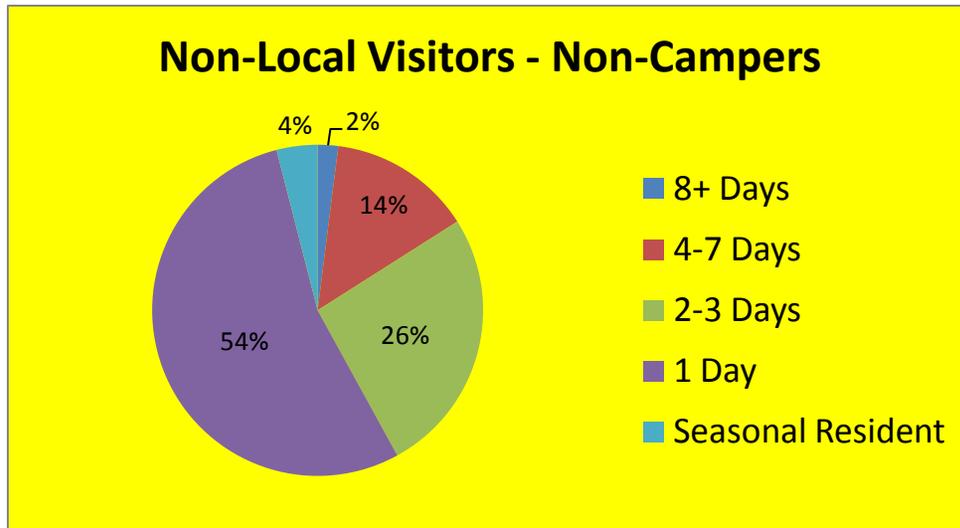
The study looked at the subset of non-local visitors who were planning on staying overnight in the Tri-County area, and then further analyzed the differences between those who were planning on camping versus other forms of accommodation.

There was quite a difference in length of stay between campers and non-campers. The majority (80%) of non-camper, non-local visitors planned to stay in the area for three days or less, with many being weekend visitors.

This type of visitor is consistent with research by the Wisconsin Department of Tourism which found that people are taking shorter, but more frequent trips, in recent years and are not traveling as far from home.
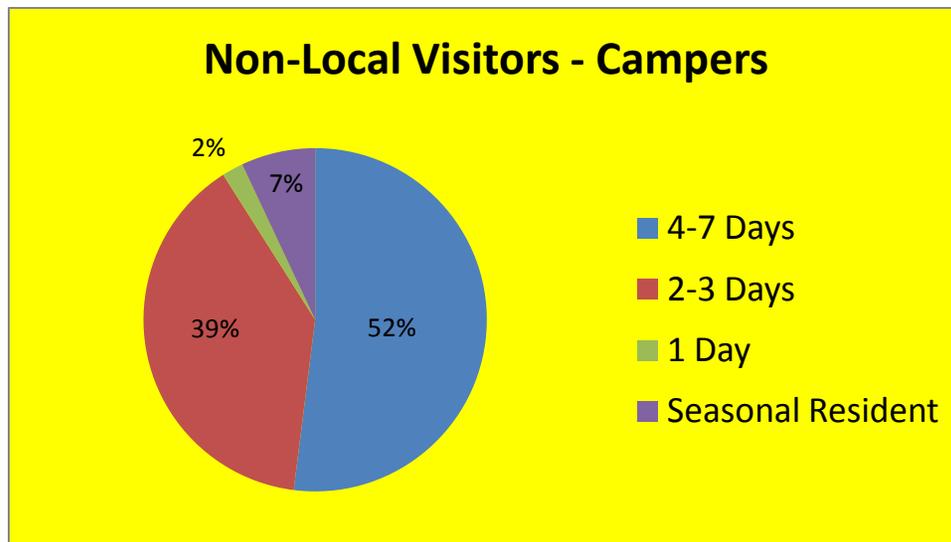
Visitor Profile - Non-Local Visitors - How Many Visits Per Season?

Most of the visitors to the Tri-County area come here during the summer months. However, several top activities and likes about the region, such as events and peaceful/restful could be year-round draws. In fact, several of those who were surveyed told us that the area needs to have more winter activities.

The number of visits per season in the summer months may be artificially high based on the following: there were a handful of visitors who said they visited the area as many as 15-30 times during the summer months; almost all of those who said that they came between 15-30 times during the summer were only here on a one day trip; and the majority of people who are coming 15+ times a year live very close to the Tri-County area, often less than 30 minutes away.

That data, however, supports the conclusion that people are going on shorter trips, and more frequently. Further, it supports the proposition that the greatest opportunity for increasing non-local visits to the area is during these winter months.
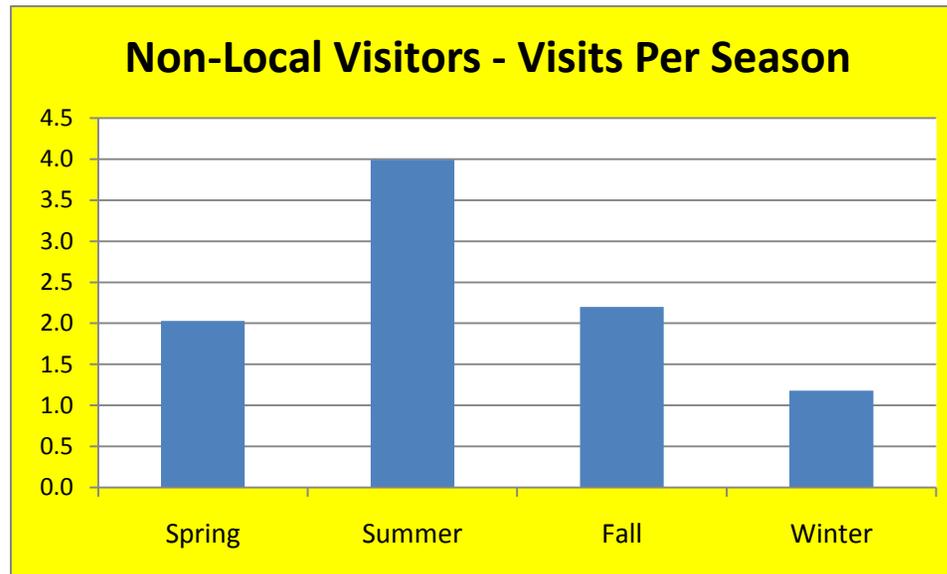
Visitor Profile - Non-Local Visitors - How Did You Hear About the Event?

The number of people who heard about a Tri-County area event by word of mouth exceeds all other methods of promotion combined. Newspaper and websites were a distance second and third. Those citing vacation or travel shows as their source of information was minimal.
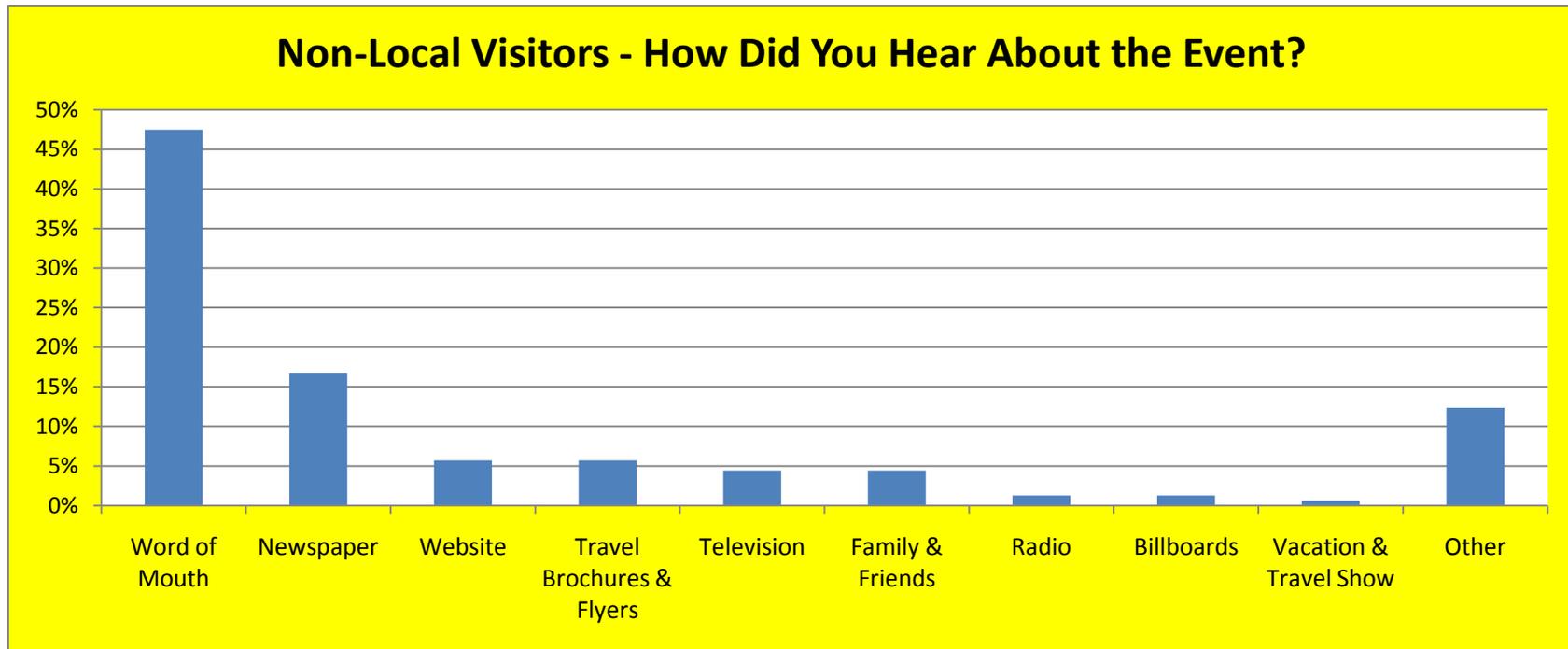
A report by the consulting firm of McKinsey & Company (see Appendix VII) provides some insight into how word of mouth promotion works. According to the authors, word of mouth is one of the most important factors behind 20 to 50 percent of a sale. The report also showed that people are most likely to recommend something when it exceeds their expectations.

People are unlikely to recommend an event if it merely meets, or is only slightly better than their expectations. So, additional investment on some aspect of an event that excites people and leads to them talking to their friends about it will cause the event to grow in popularity faster than any other form of promotion.

Visitor Profile - Local Visitors - How Did You Hear About the Event?

Word of mouth was once again the most common way that local residents learned about an event although newspapers had a greater impact on local visitors than non-local visitors. All other methods of promotion, including vacation and travel shows, had little impact on visitors.

Local Visitors (including Residents)

A bar chart showing how local visitors heard about the event, with the following approximate values:
- Word of Mouth: 41%
- Newspaper: 36%
- Travel Brochures & Flyers: 5%
- Radio: 4.5%
- Attended Previous Events: 4%
- Signs & Billboards: 2.5%
- Website: 1.5%
- Television: 0.5%
- Vacation/Travel Show: 0%
- Other: 5%
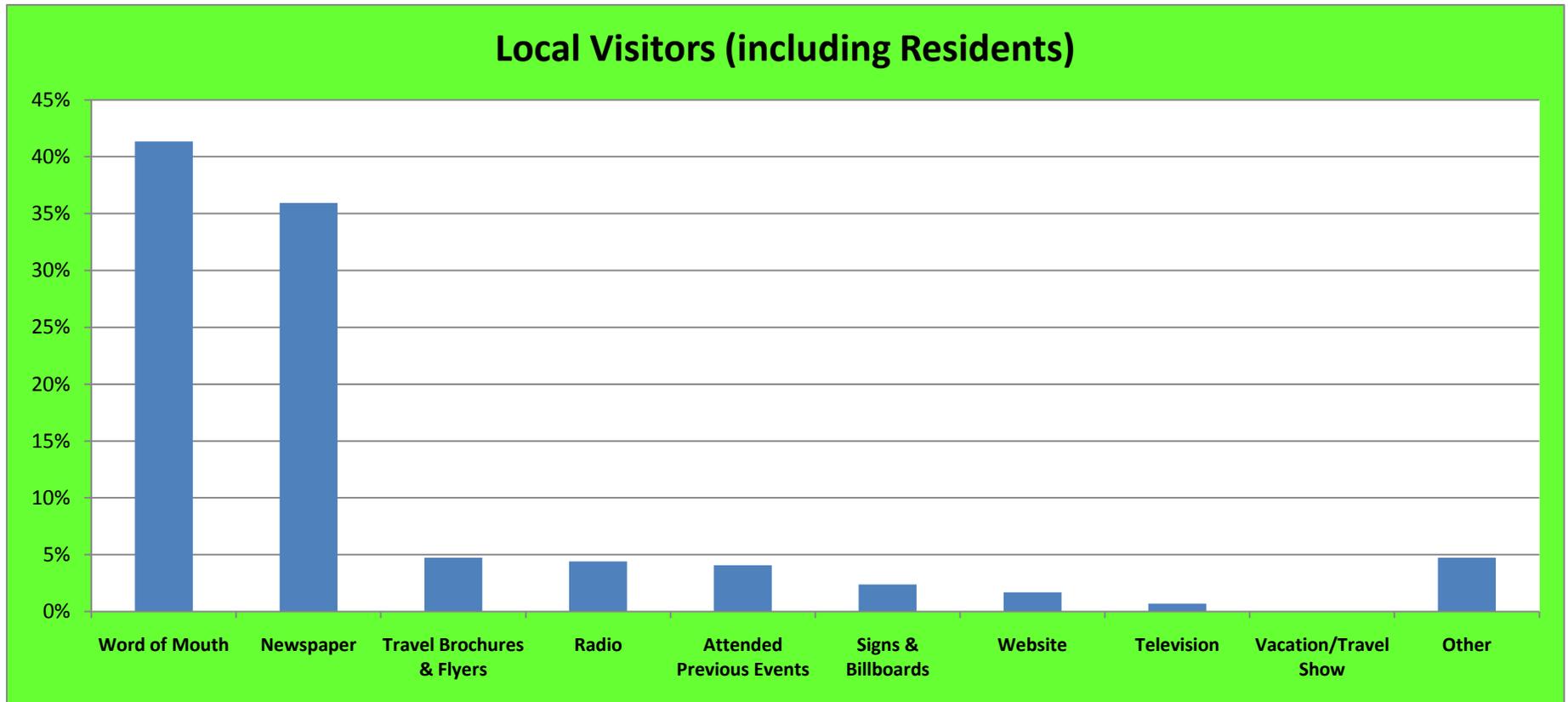
Visitor Profile - Local Visitors - What Could be Done to Bring More Tourists to the Area?

The last question we asked of local visitors, which included many residents, was what could be done to bring more tourists to the Tri-County area. Among the highest categories were more advertising and more business/industry development. A point that was made a number of times was the lack of activities for kids. In fact, the first item on the graph, "Better/More Activities", could apply largely to that age group. Installing some sort of water park for the young-adult age group was mentioned numerous times throughout the course of this study. If the Tri-County develops more young adult friendly activities, an entire family may be likely to come to the area and spend their family vacation in the area.

Local Visitors & Residents
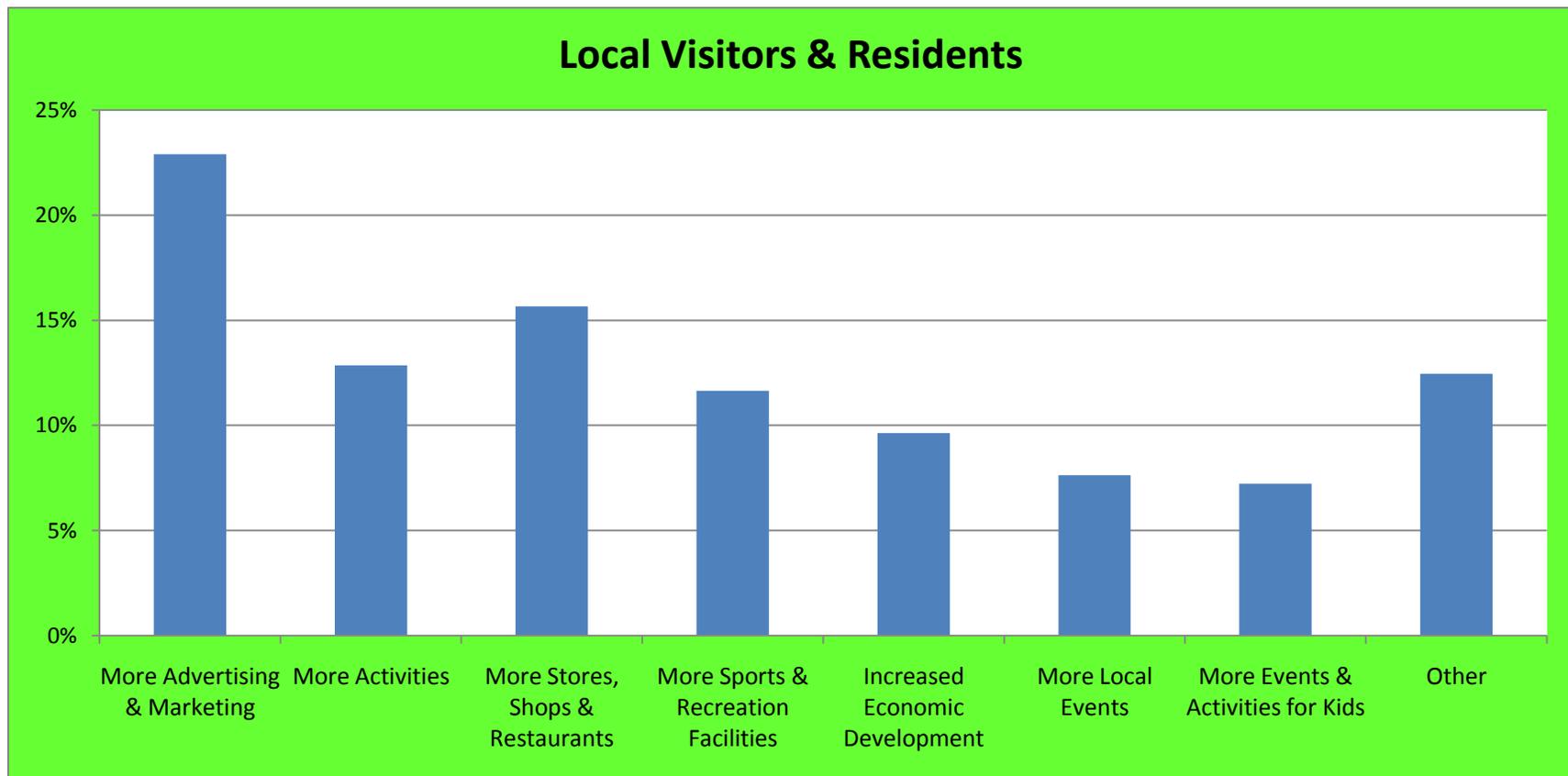
Visitor Profile - Zip Code Analysis of Non-Local and Local Visitors – Geographic Profile by State
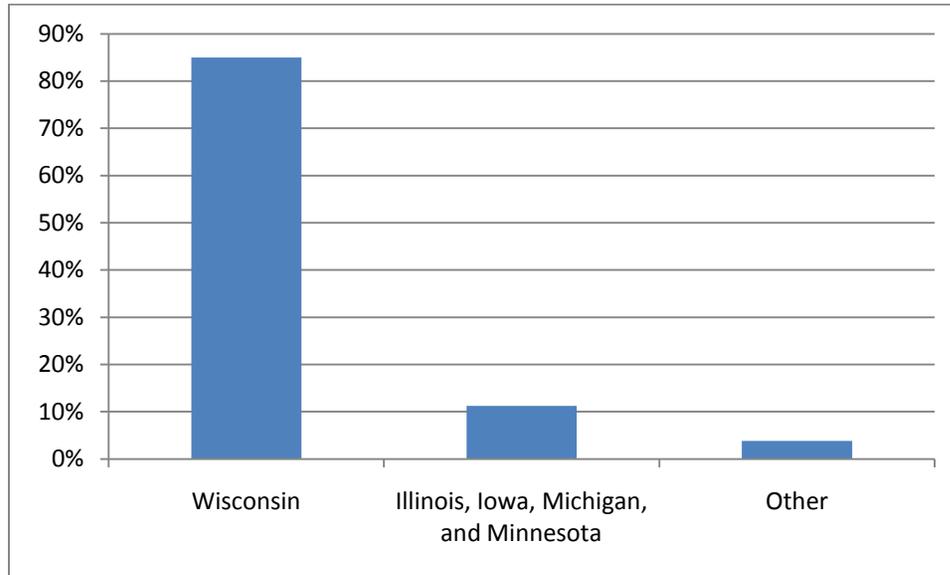
Visitor Profile - Analysis of Visitor Travel Distance from Home

Non-Local Visitor – Upper Midwest (WI, IL, IA, MI and MN)	Miles
Average Travel Distance from Home to Event: All Events	69
Average Travel Distance from Home to Event: County Fairs	41
Average Travel Distance from Home to Event: 4th of July Celebrations in Green Lake, Wautoma, and Harrisville	75
Average Travel Distance from Home to Event: Maggie Mae's	99
Local Visitor	**Miles**
Average Travel Distance from Home to Event: All Events	9
Average Travel Distance from Home to Event: County Fairs	10
Average Travel Distance from Home to Event: 4th of July Celebrations in Green Lake, Wautoma, and Harrisville	7

Visitor Profile - Zip Code Analysis of Non-Local and Local Visitors - Geographic Distribution - Map 1

Dense Number of Visitors

Medium Number of Visitors

Single Visitor

Visitor Profile - Zip Code Analysis of Non-Local and Local Visitors - Geographic Distribution - Map 2

Dense Number of Visitors

Medium Number of Visitors

Single Visitor

Visitor Profile - Zip Code Analysis of Non-Local and Local Visitors - Geographic Distribution - Map 3

Dense Number of Visitors

Medium Number Visitors

Single Visitor
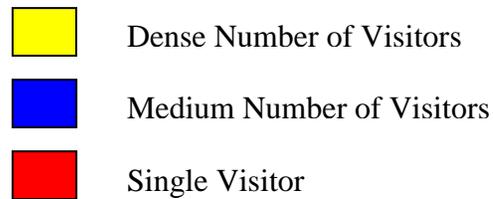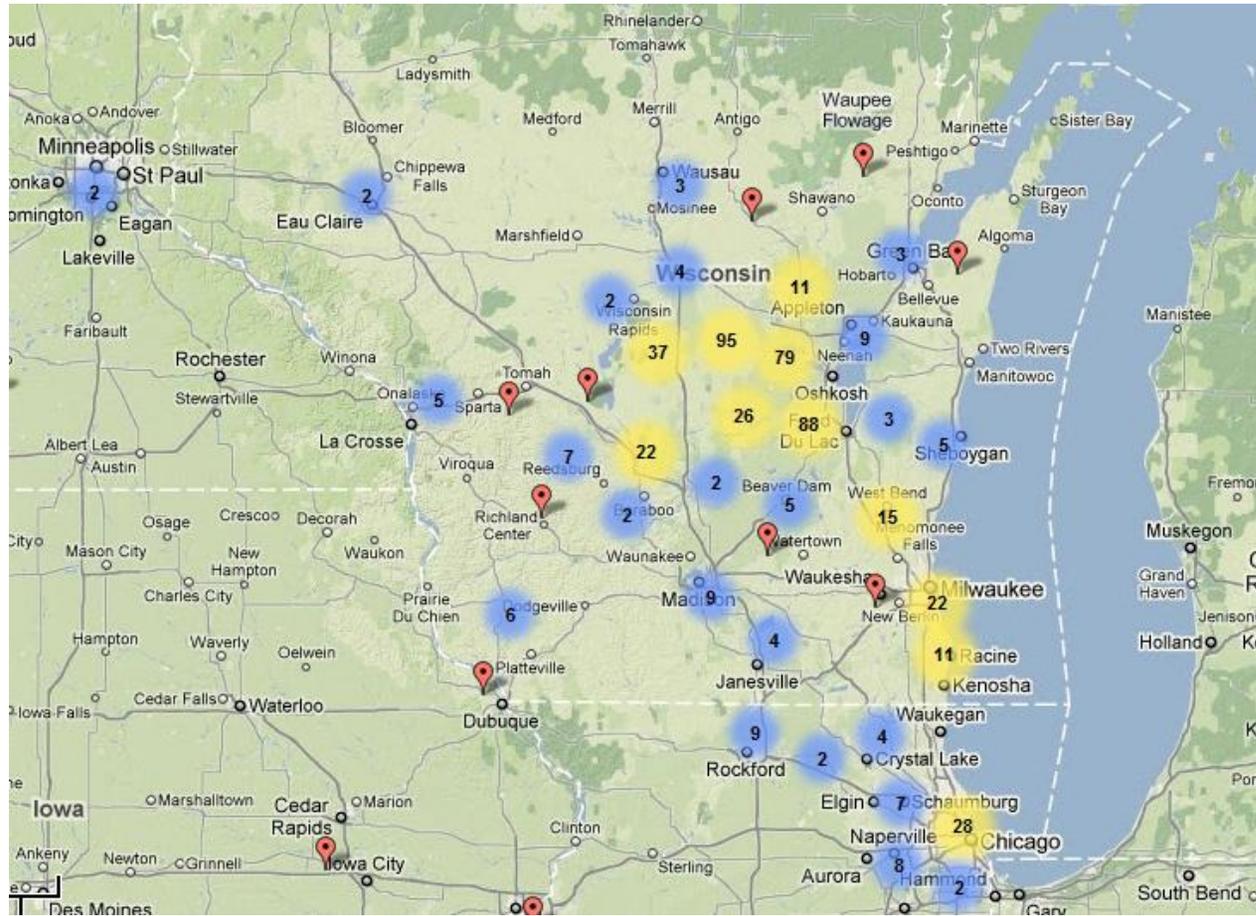
Survey Team Observations and Recommendations

General

In addition to what the survey data shows, there are several things that the survey team noticed could be done to improve the marketing of the Tri-County area to non-local visitors. The following observations and recommendations are ranked first by what the team believes will have potentially the greatest impact, with cost as a secondary factor.

1) **The Tri-County Tourism Alliance Web Site Should Be Improved As Follows:**

   - Unify the format of the three county pages linked to the TCTA website. The varying formats of the linked web sites makes it look like it's more about competition among the three counties rather than increasing tourism in general. The counties should continue to maintain their individual web sites but the TCTA site would have pages of that county information in a standard format.

   - Do a better job of selling area events on the TCTA web site with better pictures and descriptions Show the potential visitors how exciting the event will be, since they are comparing those events and the area with other vacation spots. You need to make Tri-County's look better than the others.

   - Make sure that there are accurate dates, times, and contact information for area events listed on the websites and in local travel publications.

   - Find a way to keep track of the traffic on the TCTA website to see if future efforts to encourage people to use the site to find out about local events are having an impact.

   - Add a "Build-a-Trip" feature where people can plan and purchase a vacation to the Tri-County area online, through bookings, reservations and sales incentives from local tourism businesses and attractions.

   - Include a feature where visitors can write reviews about their trip, which would benefit both local businesses and potential visitors.

   - Businesses should be permitted a profile with current information for contacting them about the services and products they offer. This is a cost-effective way for even the smallest businesses to operate a website and reach additional customers.

2) **Help Businesses In The Tri-County Area Improve Their Websites And Web Presence.**

   A majority of businesses in the area do not have a website, and many of those that do have a site that is more than a year outdated. The TCTA should sponsor a series of seminars where local businesses can learn how to effectively market their business using the web.

Survey Team Observations and Recommendations

General (cont.)

3) Improve Cooperation Of Communities For Events

Local communities do not communicate with each other as to when they are holding events. For example, everyone held their fireworks on exactly the same night. What may work better is to have a week's worth of fireworks so people go to surrounding communities for fireworks. If having the fireworks all on one night works better, then have the surrounding communities get together and have one big fireworks display that attracts a lot of people. Otherwise, you have these nice events with relatively few people at them. This is a problem that the survey team ran into when surveyors were at events. It would be frequently told that there would be 800-1,000 people at an event and was be lucky if 200 showed up.

4) Put An Area Event Schedule Together.

When the team was putting together its list of events to conduct surveys at it was necessary to use about 20 different publications and 10 different websites for the three counties to get a full schedule. The area needs to make it as easy as possible for potential visitors to find something to do because most people will not go out of their way. If you have everything in one central source or publication, it will be easier for tourists to come to the area as a destination instead of passing through to Wisconsin Dells or elsewhere.

5) Increase Presence in Statewide Travel Publications

The Tri-County Tourism Alliance should look into collaborating more with the Wisconsin Department of Tourism to enhance the region's visibility in statewide travel publications.

6) Attract Visitors Attending Other Regional Events

The Tri-County area should look at how it might be able to cooperatively attract visitors before, during or after major events in the region like EAA's Air Venture Oshkosh during the last week in July of every year. Other examples include Country USA in Oshkosh, and Maggie Mae's Music in the Barns series in Oxford. Both draw hundreds of people to the area and almost all those people need food and accommodations.

7) Encourage Uniform Business Hours

Something that we have noticed is that many shops and restaurants close at 5 p.m. even during the summer tourism season. And the few businesses which would like to stay open later can't because everyone else is closed so visitors don't come out. See Appendix IV for an example of how uniform business hours can benefit local businesses.

8) Make Sure There Is Ample Parking For Area Events.

Survey Team Observations and Recommendations

Data Based

1) **More Events for Young Adults** - In regards to the type of activities currently offered in the Tri-County area, the survey team found that local residents felt there wasn't enough for young adults to do in the area. In addition, the area also loses a lot of potential visitors in the 13-18 age group (and even into the mid 20's) because of the lack things to do. A few big events in the area for a week or weekend that focuses on that age group should be considered.

2) **Packaged Deals** - While doing this study, the survey team found that recent tourism studies have shown people are taking shorter trips, often just going for a long weekend getaway or a week at the very most. A big reason is the state of the economy. However, people still want to take their vacation; they just have to find a cheaper way to do it. If the Tri-County area could offer package deals where visitors pay a set amount per person to stay, eat, and do some activities, the team feels that could be a big success.

   Part of the reason that all-inclusive resorts are so popular is because there is no planning on the visitor's part. They can just come and relax. People are also more likely to pay a premium for a package deal because it is less work on their end. Different packages could be put together as well. For example, a 5-day package for 5 different golf courses, a Maggie Mae's show package with dance lessons and a hotel room, etc. Furthermore, if packages like these were put together, the local businesses could benefit from cross-promotion.

3) **Promotion of Events to Closer Markets** - In addition to people taking shorter trips, they also like the fact that an event is closer to their home. When visitors were asked what they liked about the Tri-County area, a common answer was that it was close to home. This is something to consider when deciding how far away TCTA wants to market an event. The down side to the event being close to home is that visitors will be less likely to stay overnight unless they are staying with family or friends.

4) **Winter Packages** - Since the summer months are already busy, TCTA should focus on bringing people to the area during the winter months. In the Kenosha area, for example, the local tourism promotion group offered packaged deals called "Relax, Renew & Reconnect – Winter Getaways That Remedy" to increase tourism from January through March (See Appendix V for more details). The package deals offered incentives for families looking for convenience over price, and promoted the relaxation aspect of the stay.

Concluding Remarks

Lastly, the survey team would like to thank the Tri-County Tourism Alliance for both its cooperation in the study and getting the word out to local businesses so that they would participate as well. It made the study easier to complete and gave us better results.

Research and Articles Cited in Report

"2004 Profile of Wisconsin's Campers" Oct 2004. Wisconsin Department of Tourism. 24 Aug 2010 <http://industry.travelwisconsin.com>.

"A Report on Research for Our Industry Partners." Jul 2010. Wisconsin Department of Tourism. 10 Aug 2010 <http://industry.travelwisconsin.com>.

"A New Way to Measure Word-Of-Mouth Marketing." Bughin, Jacques; Doogan, Jonathan; and Jorgen Vetvik, Ole. "Apr 2010. McKinsey Quarterly. 15 Jul 2010 <http://www.mckinseyquarterly.com>.

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Appendix I – Visitor Survey Forms

Non-Local Resident Survey

The UW Oshkosh Small Business Development Center and the Tri-County Tourism Alliance is conducting a study this summer of attendees to Green Lake, Marquette and Waushara County events to better market the area. We would appreciate you taking a few minutes to complete the following survey. Thank you.

<table>
<tr><td>For Office Use:
Questionnaire Number:
Interviewer's Name:
Date:
Start time:
Event:</td></tr>
</table>

1. What are the demographics of your group? (Please circle)

Person	Zip Code OR City	Gender	Age			First Time To Event?
Person 1		M or F	Under 30	30-60	Over 60	Y or N
Person 2		M or F	Under 30	30-60	Over 60	Y or N
Person 3		M or F	Under 30	30-60	Over 60	Y or N
Person 4		M or F	Under 30	30-60	Over 60	Y or N
Person 5		M or F	Under 30	30-60	Over 60	Y or N

2. What is the main reason you came to the area?

3. While in the area, what other activities will you do? (check all that apply)

___ Dining   ___ Biking   ____ Boating/Water Skiing
___ Hiking   ___ Shopping   ____ Fishing/Hunting
___ Golfing   ___ Visit museums   ____ Other (please specify):_____

4. How long are you staying in the area?

5. If staying overnight, what type of accommodations will you be using?

___ Hotel/Motel   ___ Bed & Breakfast   ___ Campground
___ Vacation Rental/Cottage   ___ Family Camp (i.e. church camp)   ____ Stay at Event
____ Other (please specify):_____

6. How did you hear about this event?

____ Word of Mouth   _____ Television   _____ Website
____ Travel Brochure   _____ Newspaper   _____ Radio
____ Vacation/Travel Show – which one: _____
____ Other(please specify):_____

7. What things did you LIKE and DISLIKE about visiting or vacationing here?

8. In the last year, how many times have you visited this area in the following seasons?

_____ Spring   _____ Summer   _____ Fall   _____ Winter

Appendix I – Visitor Survey Forms (cont.)

Local Resident Survey

The UW Oshkosh Small Business Development Center and the Tri-County Tourism Alliance is conducting a study this summer of attendees to Green Lake, Marquette and Waushara County events to better market the area. We would appreciate you taking a few minutes to complete the following survey. Thank you.

1. What are the demographics of your group?

Person	Gender	Age			First Time To Event?	Zip Code OR City
1	M or F	Under 30	30-60	Over 60	Y or N	
2	M or F	Under 30	30-60	Over 60	Y or N	
3	M or F	Under 30	30-60	Over 60	Y or N	
4	M or F	Under 30	30-60	Over 60	Y or N	
5	M or F	Under 30	30-60	Over 60	Y or N	
6	M or F	Under 30	30-60	Over 60	Y or N	
7	M or F	Under 30	30-60	Over 60	Y or N	

2. How long have you lived in Green Lake County, Marquette County, and/or Waushara County?

3. How did you hear about this event?

_____ Word of Mouth _____ Television _____ Website
_____ Travel Brochure _____ Newspaper _____ Radio
_____ Vacation/Travel Show – which one: _____
_____ Other(please specify):_____

4. What are the top attractions for visitors to this area?

5. What could be done to bring more tourists to the area?

6. Any other comments? (Feel free to write on back side)

Appendix I – Visitor Survey Forms (cont.)

UW-Oshkosh Small Business Development Center
Tri-County Tourism Survey

What is your Zip Code?

Why did you choose to come to this business?

Thank you for filling out the survey

Tri-County Tourism Study

To help local businesses attract more customers, the UW Oshkosh Small Business Development Center and the Tri-County Tourism Alliance are conducting a comprehensive visitor study.

Funded by a grant from the U.S. Small Business Administration, the study will gather information from visitors and residents of Central Wisconsin to help improve local cooperative marketing efforts in 2011. For more information on the study, contact the UW Oshkosh Small Business Development Center at 1-800-232-8939.

Appendix II – A Resident's Perspective on Tourism/Business Development

"If I wanted to live in a developed area, I would move to Milwaukee."

"I don't want this to become another Lake Geneva"

This appendix focuses on attitudes and perceptions of local residents in the Tri-County area in regards to tourism and business development. Changing attitudes and perceptions may be difficult, but it is essential to know what local residents are feeling and thinking.

The information in this appendix was gathered from in depth conversations with residents who participated in the visitor survey. While some of the information gathered may not represent what is actually happening in the area, it is important to realize that this is what some long-time residents feel is going on, and perceptions of what is happening locally are something that we feel is very important to efforts to increase local tourism and business development.

It is important to note that the majority of those surveyed recognize the need for development, but even a small group of those that do not want to see the area developed can create obstacles for increasing tourism. For example, some residents and non-local visitors do not wish to see tourism and businesses expand. In addition, some residents and business owners feel that there is a serious lack of cooperation between local units of governments and local businesses. And some residents feel that local units of government are working against increased tourism by restricting businesses development.

1) Develop a Consensus on Tourism and Business Development

In order to boost tourism/business development, there has to be a consensus that this is what is best for the community. If local residents do not want development, then many more obstacles will arise on the path of development. We found that when we asked some residents what could be done to increase tourism, some said that they do not want to see the area become more developed. One local resident said, "If I wanted to live in a developed area, I would move to Milwaukee."

It would appear that this attitude stems from the belief that expansion will result in the loss of the peace and tranquility that attracts visitors and makes the area attractive to residents. This, however, is a regressive train of thought. The area is not currently at a point in which it is reasonable to sacrifice development in order to prevent excess development. It is essential that locals know that their community depends economically on tourism. An increase in tourism means an increase in businesses, income, and standard of living.

Appendix II – A Residents' Perspective (cont.)

2) Improve Cooperation Between Businesses and Local Units of Government

In addition to the local attitudes and perception about tourism and business development already discussed, there is also a belief that there is not enough cooperation between businesses, and local units of government.

3) Increase Support of Local Units of Government for Tourism and Business Development

Other intriguing viewpoints were also uncovered when we asked residents what could be done to boost tourism and business development. It seemed as though many residents thought that their local governments and current businesses were halting the development of new businesses, particularly restaurants.

The perceived motive behind the restriction of these new developments was to provide more business to current restaurants and businesses and to ensure that long-standing family-owned businesses were not threatened. Many citizens seemed to think that these motivations are selfish and do not cater to the average community member.

One of those surveyed told of an incident reportedly about 15 years ago. According to the person, a proposed Subway was to be built as part of a gas station. When the owners of a local restaurant heard of this, they reportedly went to the local unit of government and ensured that the Subway would not be allowed in. The resident felt that this was a betrayal to those who cannot afford to eat at tourist restaurants.

Another resident felt that this type of activity was also going on but did not provide specific examples. She felt that as time has progressed, the town has developed in to two distinct classes. She identified one of the classes as those who are local and being devastated by large price increases and higher taxes. She felt that the local residents have to bear the negative effects of price increases. The other class was identified as those who run the city and own the businesses. This person felt that the city officials and business owners have an agenda that allows only those with their foot already in the door to make any progress.

Appendix III – Value of Common Business Hours during Summer Months

When a downtown has a layout similar to that in the diagram to the right, the operating hours of one business have an impact on every other business in the area.

It is therefore important to coordinate business hours so that the businesses attract the greatest number of customers possible. Additional business hours can improve customer flow not only during the lengthened time period, but also during the rest of the business day as well. The following are examples of the coordination of business hours during summer months.

Situation A

Business/Diner	Opening Time	Closing Time
Business A	9:00 AM	5:30 PM
Business B	9:00 AM	7:30 PM
Business C	9:00 AM	5:30 PM
Business D	9:00 AM	6:30 PM
Diner A	7:00 AM	9:00 PM
Diner B	7:00 AM	9:00 PM
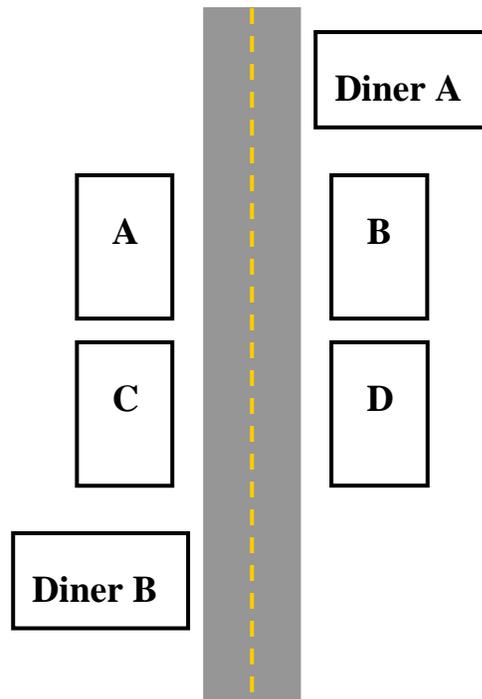
Problems Scenarios with Situation A

1. In this situation, let us say a customer decides to stop at business B at 6:30 p.m. The customer is happy because this business is open and is able to conduct his or her transaction without a problem. Customer leaves Business B and sees Business D next door. It just dawned on the customer that he or she needs something from D. Business D, A, and C, however, are already closed.

2. A customer leaves Diner A at 6:45 p.m. and walks by downtown businesses. Business B is the only business open, but the customer needs something from Businesses A and C, which are not open.

3. A customer is at home at 5:45 p.m. He or she needs something from Business B, which is open, and also needs something from Business A, which is not open. The customer decides to wait until the next day to visit downtown. The situation is similar for others, and this drastically diminishes downtown foot traffic. As a result, customers who want to go downtown to merely browse around and look no longer want to do so.

Appendix III – Value of Common Business Hours during Summer Months

Situation B

Business/Diner	Opening Time	Closing Time
Business A	9:00 AM	7:30 PM
Business B	9:00 AM	7:30 PM
Business C	9:00 AM	7:30 PM
Business D	9:00 AM	7:30 PM
Diner A	7:00 AM	9:00 PM
Diner B	7:00 AM	9:00 PM

Benefits of Situation B

1. A customer needing to make a stop at more than one downtown business can be assured that all businesses will be open until 7:30 p.m. This means the customer can visit downtown in greater confidence.

2. Businesses open until 7:30 p.m. receive greater traffic from Diners A and B, which are both open late. This also means that customers can plan to eat at a diner and shop afterwards. This means businesses will receive customers looking for specific items as well as casual customers just looking to shop.

3. In addition to businesses receiving customers from Diners A and B, the diners will receive customers from businesses. Those customers visiting downtown to shop are much more likely to visit the diners now that they are already downtown.

4. Customers are altogether more likely to visit downtown after 5:30 p.m. This is because they know something will be happening. The businesses will be open, people will be out and about, and it is an altogether more attractive place to be. This will result in more foot traffic, more customers, and more sales.

Appendix III – Value of Common Business Hours during Summer Months

Can A Downtown Business Afford To Stay Open until 7:30 p.m. Rather Than 5:30 p.m.?

It is important that businesses take into account both short and long term costs and benefits when faced with this question. In the short run, different businesses will have different levels of success. However, in the long run, a downtown area can be developed into a flourishing environment for all involved.

In the short run, a business needs to take into account what it will cost to remain open an extra two hours. In the first few weeks, perhaps months, of extended hours, traffic will still be limited in the downtown area. This means that a business will want to keep the costs of operation as low as possible.

If a business owner values his or her time at $20 an hour, and pays an hourly employee at $8 per hour, the owner saves himself/herself $12 an hour. Using this figure of $8 an hour for labor to keep the business open, let us figure out the costs of staying open for a hypothetical business:

Cost		Total
Labor	$8/hour	*2=$16
Overhead	$3/hour	*2=$6
Total		$22

These are the daily costs for the business in the short run. As a business remains open, more costs may develop, but these will be the result of an increase in business, which means these costs would be necessary for the further development of the business. These costs show that a business will need to make just $22 a day to remain open an extra two hours. If an owner can sacrifice his or her time for less than $8 an hour, the cost is even less. Now, let us present the other benefits of remaining open:

Benefits of staying open

Benefits for Business
Increased Customer Flow
Increased Word of Mouth
Increased Sales
Long-term growth

Benefits for Others
Businesses/restaurants receive more traffic
Customer Satisfaction
Employee earns wage
Downtown flourishes
Increased foot traffic in area
City as a whole attracts more business

Costs of not staying open:

Costs for Business
Loss of customers
Loss of word of mouth
Lost sales
Inhibited Growth

Costs for Others
Less foot traffic
Customers do not receive desired product
Employee loses wage
City receives less traffic
Downtown as a whole attracts fewer customers

Appendix IV – Value of Packaged Deals
Kenosha's "Relax, Renew, Reconnect – Winter Getaways That Remedy"

While doing some basic background research about visitor studies, we came upon a very similar study done in Kenosha in 2003. The goal of Kenosha's study was similar to the Tri-County Tourism Alliance study, but their focus was to increase tourism in their slowest months, which are January through March. They were also trying to increase awareness of the Kenosha area.

To achieve those two goals, tourism officials in the Kenosha area developed a "Relax, Renew & Reconnect – Winter Getaways That Remedy" program to get people out of their homes for a weekend to relax and rejuvenate. The primary driver of this promotion was packaged deals.

The theory behind such deals is that people are willing to pay a little more for convenience. It was assumed that a lot of people would be more willing to come if they didn't have to plan anything, or in other words, if the trip was in a sense, all inclusive. This package deal idea required that businesses in the Kenosha area work together.

If they could successfully work together, then all the businesses involved would benefit and they would all be helping each other. One thing that the project had going for them was support from a Wisconsin JEM grant that allowed the area to market the promotion through advertising in several big name newspapers in Illinois and Wisconsin.

For the package deal, six different hotels that agreed to go along with the project. All six not only offered a room, but a gift certificate to a restaurant, and some form of entertainment. Most hotels charged around $130 the package. The results of the promotion were reportedly phenomenal.

Participating hotels were able to increase occupancy rates by 5 percentage points during the program period, which resulted in the sale of 870 additional room nights from the previous year. The Kenosha area tourism web site also received more than 1,700 hits due to this promotion, and the area received eight free media placements about their winter promotion.

The survey team contacted the marketing director for this project, and she stated that this program was a huge success and is now offered more as a "product" than promotional item. She stated that it has really caught on, and the tourists enjoy it. The Tri-County area could easily implement something like this.

All that needs to be done is for tourism a businesses to communicate with one another with the goal of a 5 percentage point increase in occupancy rate for the Tri-County hotels and motels. Furthermore, if through a similar program, the Tri-County Tourism Alliance was also able to drive more people to its website; potential visitors would be more apt to look at what else the area was offering.

For more details, see:

"Relax, Renew, Reconnect – Winter Getaways That Remedy." Goodwin, Deanna. Mar 2003. Wisconsin Department of Tourism. 3 Aug. 2010 <http://industry.travelwisconsin.com>.

Appendix V – Leveraging Value of Region's Events - Maggie Mae's

As noted in the observations and recommendations of the survey team, big regional events should be used to help bring more visitors to the Tri-County area. One such opportunity is the musical performances at Maggie Mae's café in Marquette County.

Maggie Mae is an up and coming country artist who, along with her husband Roger, own and operate the café in Oxford, Wis. After sitting down and meeting with them, we were truly amazed at what they have been able to accomplish.

Maggie Mae started out singing in her café (which she still does), but she now travels throughout the United States and has even recorded 5 CDs in Nashville. Maggie even has her own TV program on the RFD TV network. People are currently coming from all over the United States and even the world, to see her perform in Oxford.

There is an opportunity for surrounding communities to greatly benefit from the number of people that Maggie Mae brings in. A lot of these people come for several days and need a place to stay. Unfortunately, there are no lodging facilities nearby.

Furthermore, other restaurants in the area could benefit because most people who eat out will not eat at the same restaurant three or four times in a two day time span. Local businesses need to find a way to reach out to Maggie Mae's. Maggie Mae and Roger are very receptive to working with others and growing their business in the Tri-County area.

Appendix VI – McKinsey & Company's Word of Mouth Study

A study conducted by the consulting firm of McKinsey & Company showed that "word of mouth" was the main driver in 20 to 50 percent of consumer purchasing decisions. The study went on to say that while traditional marketing strategies work, they don't work as well as positive word of mouth.

Part of the reason why this is the case is because people are so bombarded with advertising and marketing from hundreds of companies and places that people don't have time to listen or be swayed. As a result, many people rely on the advice or recommendations of those they trust.

If someone gives a strong recommendations one way or the other, that might be enough for a person to buy something or not, or to go to an event or not. In fact, the study showed that a recommendation from a trusted individual may be up to 50 times more likely to trigger a purchase than a recommendation from someone the purchaser doesn't know or trust.

According to the McKinsey & Company study, there are three different forms of "word of mouth" promotion, with the most influential form being "experimental word of mouth." This type of promotion accounts for between 50 and 80 percent of word of mouth activity, and is related to a consumer's interaction with a product, event, etc.

If the event greatly exceeds their expectation, they will talk about it and make recommendations to their friends. However, the opposite can hold as well if a consumer is under satisfied. To get the full benefit of experimental word of mouth promotion, satisfied customers or event attendees need a way to share their experience with others.

For more details, see:

"A New Way to Measure Word-Of-Mouth Marketing." Bughin, Jacques; Doogan, Jonathan; and Jorgen Vetvik, Ole. "Apr 2010. McKinsey Quarterly. 15 Jul 2010 <http://www.mckinseyquarterly.com>.