



2012

Traveler Motivation Study



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STUDY HIGHLIGHTS

- ◆ Travelers have not visited Door County because they know *nothing* about the County
- ◆ Door County visitors are older and less likely to have children living in their household
- ◆ Door County winter visitors spend substantially less and are more likely to stay in non-paid accommodations—they act like locals
- ◆ Of those who have never visited Door County, their impressions of the County are much lower than their expectations of an average leisure destination, and also much lower than Door County visitors
- ◆ Door County has a loyal visitor base

PURPOSE OF STUDY

To Understand.....

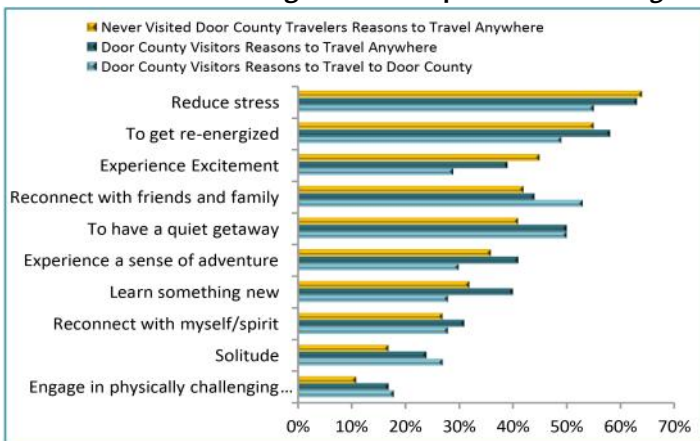
- ◆ Why people travel anywhere for leisure
 - Door County Visitors
 - Never Visited Door County
- ◆ Door County Visitors—Who, Why, When?
- ◆ Why people *don't* travel to Door County
- ◆ Impressions and attitudes toward Door County
 - Door County Visitors
 - Never Visited Door County

SAMPLE COMPOSITION

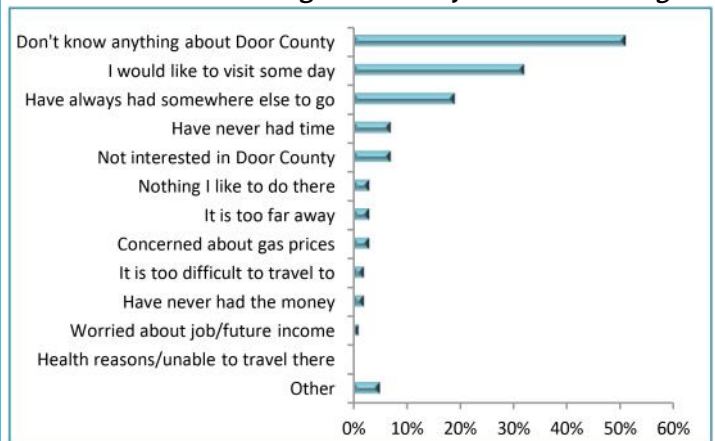
- ◆ Online—collected 4 times during 2012
 - 1,074 Door County Visitors
 - 1,608 Travelers who have Never Visited Door County
- ◆ HH Income of \$50,000 or more
- ◆ Reside in
 - Wisconsin (excluding Door County)
 - Minnesota - Iowa
 - Indiana - Michigan
 - Illinois

DEMOGRAPHICS	NEVER Visited	All Visitors	Spring Visitors	Summer Visitors	Fall Visitors	Winter Visitors
Avg. Age (years)	44.6*	49.8	46.1	50.0	51.5	47.8
Avg. Income (000)	\$108.6	\$107.9	\$107.6	\$107.4	\$108.6	\$108.1
Have Kids in HH	36%*	26%	28%	29%	21%	29%
Had Kids on Most Recent Trip	N/A	26%	27%	30%	18%	31%
Avg. Length of Stay (nights)	N/A	3.5	3.0	3.9	3.3	3.3
Avg. Party Size (people)	N/A	3.58	3.57	3.67	3.40	3.93
Top 3 Origin States (among those surveyed)						
Wisconsin	4%	44%	44%	41%	47%	53%
Illinois	30%	31%	40%	30%	31%	24%
Minnesota	17%	9%	6%	11%	10%	2%

Reasons for Taking a Leisure Trip—Excellent Ratings



Reasons for Never Visiting Door County—Excellent Ratings



* Similar to visitors to the average U.S. leisure destination

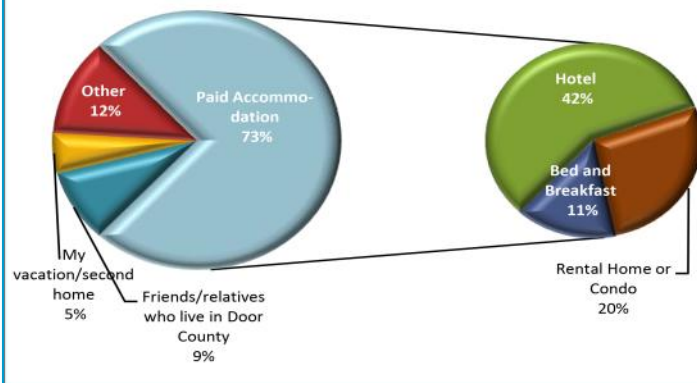
Influential Planning Sources Specific to Door County
(Most recent trip among visitors in past 12 months—mean on 7-point scale)

	All Visitors	Spring Visitors	Summer Visitors	Fall Visitors	Winter Visitors
Internet Articles/Blogs	3.47	3.49	3.55	3.41	3.10
Door County Newsletter	3.32	3.17	3.37	3.33	3.19
Advertising (Print/TV)	3.13	3.21	3.10	3.11	3.29
Email about Door County	3.11	3.24	3.03	3.18	3.14
Internet Videos	2.69	2.93	2.71	2.59	2.59

Top Sources Used to Plan a Trip to Door County

	Visitors in Past 12 Months	Visitors Planning Trip in Next 12 Months	Never Visited, but Planning Trip in Next 12 Months
Door County Website	61%	68%	92%
Internet Search Site	54%	55%	86%
Family/Friend Recommendation	57%	57%	60%
Hotel Website	52%	55%	80%
Door County Guide Book	47%	51%	46%
Published Event Calendar	32%	47%	41%
Internet Booking Site	12%	18%	51%

Accommodation Type

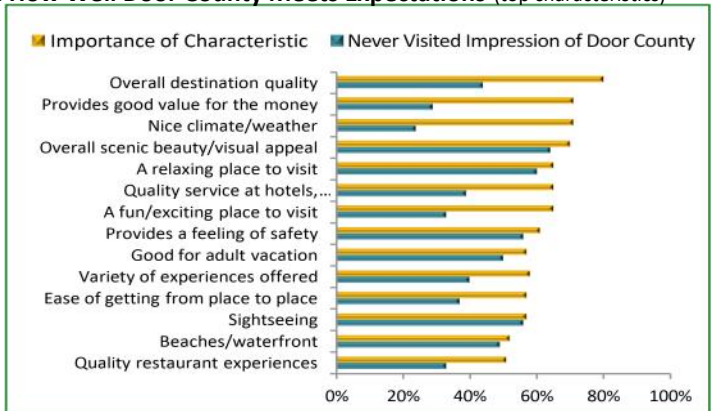
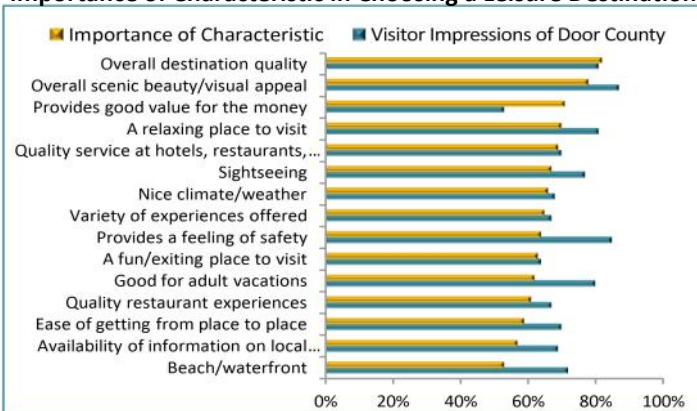


Visitor Spending	All Visitors	Spring Visitors	Summer Visitors	Fall Visitors	Winter Visitors
Average	\$933	\$837	\$992	\$922	\$699
Lodging	37%	36%	39%	35%	30%
Food/Beverage	26%	27%	27%	26%	26%
Entertainment	11%	9%	12%	8%	11%
Shopping	20%	23%	17%	23%	27%
Other	5%	6%	5%	7%	6%

Top Activities Participated In/Plan to Participate In

Visitors in Past 12 Months	Visitors Planning Trip in Next 12 Months	Never Visited, but Planning Trip in Next 12 Months
Top 10 1. Touring/sightseeing 2. Dining out/experiencing local cuisine 3. Shopping 4. Visit beach/lake/river/waterfront 5. Browse antique/craft shops 6. Visit wineries 7. Hike, bike 8. Visit historic sites 9. Visit lighthouses 10. Visit art exhibits and galleries	Top 10 1. Dining out/experiencing local cuisine 2. Shopping 3. Touring/sightseeing 4. Visit beach/lake/river/waterfront 5. Visit orchards/farmer's markets 6. Visit wineries 7. Browse antique/craft shops 8. Hike, bike 9. Visit lighthouses 10. View fall color & attend festival, craft fair, etc.	Top 10 1. Dining out/experiencing local cuisine 2. Touring/sightseeing 3. Visit beach/lake/river/waterfront 4. Visit lighthouses 5. Shopping 6. Visit historic sites 7. Visit wineries 8. Attend festival, craft fair, etc. 9. Browse antique/craft shops 10. Visit orchards/farmer's markets

Importance of Characteristic in Choosing a Leisure Destination vs. How Well Door County Meets Expectations (top characteristics)



Executive Summary

This report seeks to provide insight into travelers who visit Door County, Wisconsin for a leisure trip as well as travelers who have never visited the County, particularly in terms of what motivates them to travel. Travelers resided in the key markets of Wisconsin, Minnesota, Iowa, Illinois, Indiana and Michigan, which combined account for approximately 80% of all travel to Door County according to DKSA's *PERFORMANCE/Monitor*SM.

One of the most significant findings of this study is that those who have never visited Door County report the primary reason they have not done so is because they don't know anything about the County. This should be easy – just tell them about it. But how do you decide what to tell.

First, let's look at the similarities and differences between Door County visitors and those who have never visited the County.

Regardless of season Door County visitors are on average about 5 years older and less likely to have children in their households than travelers who have never visited the County. They have a household income of approximately \$108,000, similar to non-visitors (sample based on minimum \$50,000 HH income) and reside primarily in Wisconsin or Illinois.

The primary reason travelers in this study travel anywhere is to reduce stress and get re-energized. Door County visitors also travel to have a quiet getaway and reconnect with friends and family, while non-visitors also want to experience a sense of excitement. Although non-visitors claim to want excitement, engaging in physically challenging activities is low on their list.

Visitors and non-visitors alike look for very similar characteristics when choosing a leisure destination. The key is how well does the perception of a specific destination meet the expectations of the traveler.

Overall, visitor impressions of Door County as compared to the level of importance placed on specific characteristics indicate that the County does a pretty well at meeting expectations of their visitors.

Non-visitors on the other hand have very different impressions of Door County. The image in their mind is that Door County does not really meet the expectations they have of a leisure destination. But how their impressions were formed is somewhat of a mystery since they indicate that they don't know anything about Door County. Thus we come back to education - the non-visitors need to be educated about Door County.

What is the best way to educate potential travelers? If we look at the sources of information used for trip planning, particularly by non-visitors, the majority are Internet based. It is unlikely non-visitors will choose to learn about Door County on their own, thus information needs to be pushed to them. Perhaps one solution, assuming they are Internet users in general, would be to do an Internet promotion ultimately driving potential visitors to the Door County website. Perhaps combine this with a radio campaign in target markets which is designed to raise awareness of what Door County has to offer.

Assuming non-visitors who plan to visit Door County are similar to other non-visitors, perhaps depict the types of activities they would plan to engage in on a trip to Door County. These may include dining out, touring/sightseeing, beach/water activities, visiting lighthouses and shopping. Although some visitors certainly visit for family vacations, the majority are adults, thus it would be important to show activities adults enjoy.

Since Summer travelers spend the most money, this might be the primary target season. While many visitors seem to come for long weekends, the longer the stay the more money that is spent, so perhaps the message is about longer stays. Assuming this is the case, the campaign should probably begin about 3-4 months earlier than the start of the season because longer vacations taken by travelers in the target markets are generally planned about 3 months out and about 2 months out for trips to Door County.

A nice opportunity exists with 32% of non-visitors saying they might take a trip to Door County in the next 12 months. Once these folks have visited, it is very likely they will do so again. With 80% of visitors saying they will return to Door County sometime, and over 50% saying they will return again in the next 12 months, one thing seems certain, once a Door County visitor always a Door County visitor.

For the complete 78 page Traveler Motivation Study, download a PDF version at
<http://bit.ly/DCWTMS2012>



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