



**D. K. Shifflet
& Associates**

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**DOOR COUNTY, WISCONSIN
TRAVELER MOTIVATION STUDY**

Final Report

Waves 1, 2, 3 and 4 – December 2012

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Traveler Motivation Study

*Understanding what motivates people to travel
in general and to Door County, Wisconsin*

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January 2013

The Door County Visitor Bureau, in an effort to better understand the motivation of leisure travelers and potential leisure travelers to Door County commissioned DKSA to conduct a study among those who have visited Door County in the past 12 months for a leisure trip as well as those who have never visited the County. This study was designed to assess what motivates leisure travelers in general and, in particular, their motivation, impressions and attitudes toward leisure travel to Door County, Wisconsin. Differences between seasonal travelers are also explored.

Data for this study were collected via an online survey at four different times throughout 2012 in the months of January, March, June and September. Each survey period consisted of three unique samples resulting in a sample of leisure Visitors and a sample of leisure travelers who have Never Visited Door County.

To best represent Door County's target markets, only respondents who had traveled anywhere for leisure in the past 12 months with a minimum household income of \$50,000 were accepted into the study. Additional residential requirements were dependent on the samples as outlined below.

DOOR COUNTY VISITORS

1. Visitors to Door County provided by e-Brains on behalf of the Door County CVB. These are people who have requested materials about Door County. A total of 272 responses were obtained from this sample. There was no geographical parameter for this group.
2. Visitors to Door County, provided by Research Now, living in Door County's traveler origin states of Wisconsin (excluding Door County), Minnesota, Iowa, Illinois, Indiana and Michigan. A total of 802 responses were obtained from this sample resulting in a combined total of 1,074 Visitors to Door County. The sample recruited for this group was demographically balanced on the outgo and represents 75% of the total Visitor sample. Due to the segmentation of this sample rebalancing of the returned sample was not possible.

NEVER VISITED DOOR COUNTY

1. Travelers who have Never Visited Door County, provided by Research Now, living in Door County's traveler origin states of Wisconsin (excluding Door County), Minnesota, Iowa, Illinois, Indiana and Michigan. A total of 1,608 respondents who had Never Visited Door County were obtained from this sample. The sample recruited for this group was demographically balanced on the outgo. Due to the segmentation of this sample rebalancing of the returned sample was not possible.

The target states selected by the Door County Visitor Bureau represent slightly more than 80% of leisure travel to Door County over the past 5 years according to DKSA's *PERFORMANCE/Monitor*SM data for Door County. Remaining visitors came from throughout the U.S.

SAMPLE COMPOSITION

Data in this report are reported by leisure travelers who have Never Visited Door County and leisure travelers who have Visited Door County in the past 12 months. Visitors are further analyzed by the season they last visited Door County.

Door County	January	March	June	September	Total
Visitors	302	243	273	256	1,074
eBrains	103	40	73	56	272
Research Now	199	203	200	200	802
Season Last Visited					
Spring (Mar-May)	16	15	79	31	141
Summer (Jun-Aug)	158	110	88	167	523
Fall (Sep-Nov)	109	96	94	52	351
Winter (Dec-Feb)	19	22	12	6	59
Never Visited					
Research Now	400	404	401	403	1608

This study does not attempt to estimate the visitor volume or share of travel to Door County from the surveyed geography.

RATINGS

Ratings presented in this study are based on a 7-point rating scale, where 1 is always the lowest rating and 7 is always the highest rating. 'Excellent' ratings presented in the following charts are considered to be ratings of 6 or 7 (Top 2 Box).

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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

Study Highlights:

- Door County exceeds expectations of visitors
- Travelers go to Door County to reconnect with family and friends, have a quiet getaway, reduce stress and to get re-energized
- Door County travelers are older and less likely to have children in the household
- Door County Winter travelers spend substantially less and are more likely to stay in non-paid accommodations
- Not knowing anything about Door County is primary reason for never visiting
- Non-visitor impressions of Door County are much lower than expectations of leisure destination - also much lower than visitors

Executive Summary

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.

Sample Demographics

Gender

As expected, the gender breakout for each of the two samples, Visitors and Never Visited, were very similar with more females than males responding. These proportions are very similar to leisure travel in general where, according to DKSA's *PERFORMANCE/Monitor*SM, the male/female split is about 40/60.

While females represent the largest proportion of travelers for all seasons, the largest percentage of females visited in the Spring and largest percentage of males visited in the Winter.

Age

The average age of leisure travelers to any US destination is approximately 45 years. Those who have never visited Door County have a very similar average age, but those who have visited Door County in the past year are about 5 years older.

On average Fall visitors are the oldest and Spring visitors are the youngest.

Income

The average income of the visitor and never visited samples is in the \$108,000 ranged, which is similar to the average leisure traveler with at least a \$50,000 household income. Average income is similar regardless of the season of travel.

Children in Household

Those who have never visited Door County are much more likely to have children in their household than are Door County visitors. This makes sense when considering the age difference between visitors and those who have never visited the County.

For those who have never visited Door County, the presence of children in the household is very similar to the average US leisure traveler household.

Fall visitors are the least likely to have children in their households.

Origin State

Two of the three samples used for this study were derived from Door County's target markets. DKSA data confirms that over 80% of leisure travelers to the County come from these states, with the largest portions coming from the Milwaukee and Chicago MSAs.

In total and across all seasons, the majority of Door County leisure visitors hail from Wisconsin. Illinois is second with all other states far behind.

Sample Demographics

	NEVER Visited	All Visitors	Spring Visitors	Summer Visitors	Fall Visitors	Winter Visitors
Male	42%	43%	40%	43%	42%	47%
Female	58%	57%	60%	57%	58%	53%
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%
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%

Door County Visitors are older and less likely to have children in the household than those who have Never Visited the County.

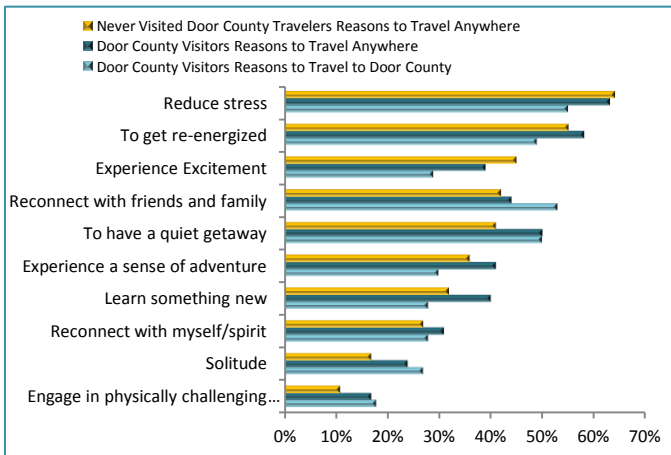
Why People Travel

To reduce stress and get re-energized are the main reasons all respondents in this study report for taking a leisure trip. For those who have never visited the next most important reason to travel is to experience excitement. It is quite the opposite for Door County visitors who take a leisure trip to have a quiet getaway.

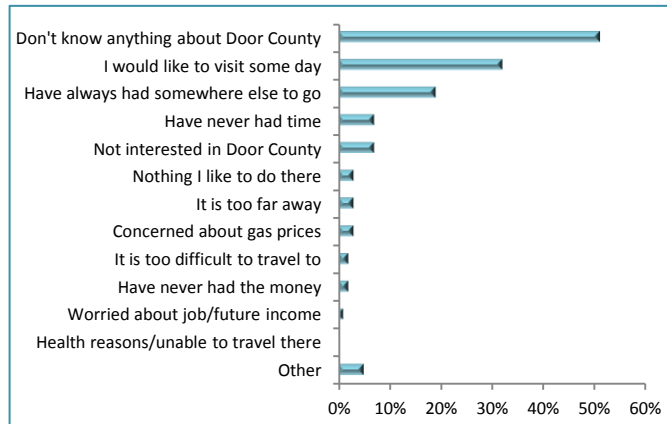
Door County visitors *travel to Door County* specifically to reduce stress, reconnect with friends and family and to have a quiet getaway. The most recent leisure trips taken to Door County were for a Couples Getaway or a Family Vacation.

To experience solitude or engage in physically challenging activities are the least likely reasons for anyone to take a leisure trip anywhere.

Reasons for Taking a Leisure Trip (Top 2 box)



Reasons for Never Visiting Door County



More than half the respondents who have never visited Door County say they don't know anything about the County. This is a real opportunity. If people in the neighboring states just knew more about what there is to do and see in the County, visitors to the County are likely to increase substantially particularly since over 30% of those who have never visited claim that they would like to visit some day.

The fact that non-visitors don't know anything about Door County is further evidenced by their very low awareness of attractions within the county. While at least half of Door County visitors have heard of all attractions in the County, less than 10% of those who have never visited have heard of most destinations listed.

People travel to Door County to:

- Reduce Stress
- Reconnect with family/friends
- Have a quiet getaway

People do not travel to Door County because:

- They don't know anything about the County.

Important Leisure Destination Characteristics

As might be expected, the overall quality of a destination is the most important characteristic travelers consider when choosing a leisure destination. Having scenic beauty and a nice climate also rank high, and being a good value for the money typically rounds out the top three desired characteristics for all travelers.

Historically night life and gaming have ranked much higher on the list of desirable characteristics. It is only in recent years that these have dropped so far down the list. This may be due, in part, to changing behaviors of travelers in general. People with young families take trips with their families at a much greater rate than

did their parents and thus are engaging in different, more family oriented, activities than did the generation before them. The past several years of a declining and stagnant economy may also be playing a role.

It is worth pointing out that the most sought after leisure destination characteristics are the same for Door County visitors as well as those who have never visited the County. This coupled with the primary reason travelers have never visited Door County would indicate that getting the word out about the attributes of Door County is likely to draw more visitors.

Characteristics in Choosing Any Leisure Destination

NEVER Visited	ALL Visitors	Spring Visitors	Summer Visitors	Fall Visitors	Winter Visitors
Top 3 1. Overall destination quality 2. Nice climate/weather (Tie) 3. Good value for the money (Tie) 4. Scenic beauty/visual appeal	Top 3 1. Overall destination quality 2. Scenic beauty/visual appeal 3. Good value for the money	Top 3 1. Overall destination quality 2. Scenic beauty/visual appeal 3. Relaxing place to visit	Top 3 1. Overall destination quality 2. Scenic beauty/visual appeal 3. Good value for the money	Top 3 1. Overall destination quality 2. Scenic beauty/visual appeal 3. Quality service at hotels/restaurants	Top 3 1. Scenic beauty/visual appeal 2. Quality service at hotels/restaurants 3. Overall destination quality
Bottom 3 1. Live theater/music/concerts (Tie) 2. Popular well-known place (Tie) 3. Art galleries, antique/craft shops 4. Gaming	Bottom 3 1. Popular well-known place 2. Night life/entertainment 3. Gaming	Bottom 3 1. Popular well-known place 2. Live theater/music/concerts (Tie) 3. Night life/entertainment (Tie) 4. Gaming	Bottom 3 1. Popular well-known place 2. Night life/entertainment 3. Gaming	Bottom 3 1. Popular well-known place 2. Night life/entertainment 3. Gaming	Bottom 3 1. Popular well-known place 2. Night life/entertainment 3. Gaming

Winter visitors rate almost every characteristic higher than do visitors in other seasons.

Leisure Trip Planning Time Frames

Visitors to Door County and those who have never visited plan leisure trips in very similar time frames — about 3 months for a Vacation and about a month for a Weekend Getaway. Among Door County visitors, Spring travelers have the shortest planning cycles for vacations and Summer travelers have the longest.

Visitors to Door County plan their trips to the County in slightly shorter time frames. They planned their most recent trip to the County in an average of about 2 months. They expect this timing to be the same for trips they plan to take to the County in the next 12 months.

These planning cycles are important to keep in mind when making promotion timing decisions.

Influence of Information Sources

Travelers are influenced by a variety of information sources when planning a leisure trip. The most influential source of information for all travelers is the recommendations of family and friends followed by destination websites and printed travel guides and hotel websites.

In general, the least influential sources of information for both Door County visitors and those who have never visited the County are recommendations on social networks such as Facebook and Twitter, destination newsletters, promotional emails and destination advertising.

When planning their most recent trip to Door County, however, the most influential *destination specific* sources of information were

Internet articles/blogs about Door County and the Door County Visitor Bureau newsletter. These were followed by advertising (newspaper, TV, online, magazine, etc. about Door County and emails they received about Door County. This is a very important finding specifically as it relates to attracting new visitors to the County.

The value of these broad based promotional activities is important to understand because these are probably some of the best ways to inform the non-visitors about Door County and what it has to offer them.

Influential Sources Specific to Door County

Mean on 7-point Scale (Most recent trip among visitors in past 12 months)					
	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

Trips to Door County are planned approximately 2 months before the trip is taken.

Most travelers depend on recommendations from friends and relatives.

Sources Used in Planning a Door County Trip

It is important to understand which sources of information travelers are influenced by, but it is equally or even more important to know which sources travelers actually use in planning a trip.

Almost every traveler who has not yet visited Door County, but is planning to in the next 12 months plans to use the Door County Website as a source for planning their trip. This means that the website may be their first interaction with the County itself. A large percentage of this group also plans to use Internet search sites and Hotel Websites.

Those who have visited Door County in the past, also plan to use

the Door County Website followed by the recommendations of friends and family and Internet search sites.

With the strong propensity toward the use of online planning sources, it is very important that the Door County website be extremely current and easy to navigate. It is also important that anything related to leisure travel in Door County be optimized for general Internet searches.

With an average rating of 5.33 out of 7 possible among those who have used the Door County Website, 45% rate it a 6 or 7 in terms of meeting their expectations. Although this is good, there is still room for improvement.

Top Sources Used to Plan a Leisure 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 (Orbitz, Travelocity,etc.)	12%	18%	51%

Internet is the preferred source for those who have never visited.

Door County Most Recent Trip

When? With Who? How Long? Where?

Summer is overwhelmingly the season of choice to visit Door County, with about half the visitors surveyed claiming they last visited the County then. About a third claimed to have last visited in the Fall making it the clear second season.

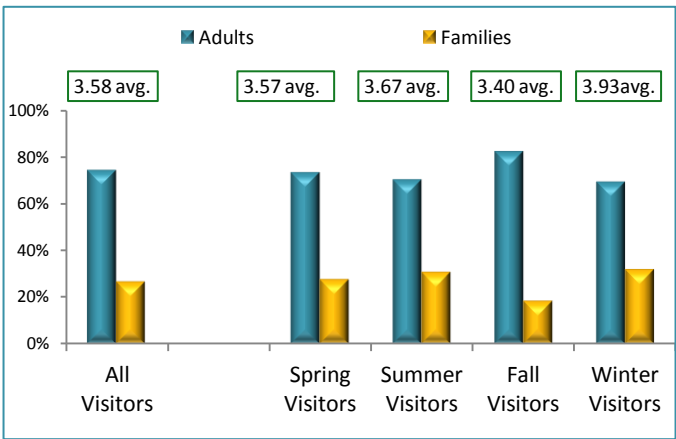
With an average travel party size of 3.58 people, most travel parties are comprised of adults only. Although a larger proportion of families with children visit in the Summer and Winter, families still account for less than one-third of the travel parties during these seasons. It makes sense then that most people visit Door County for Couples Getaways followed by Family Vacations. Very few respondents in this study claimed to have visited for Friend/Group Gatherings or Girlfriend Getaways and none had traveled for Honeymoons or as part of an Adventure Travel Group.

The average visitor to Door County stays about 3.5 nights. As might be expected, the longest stays are during the Summer.

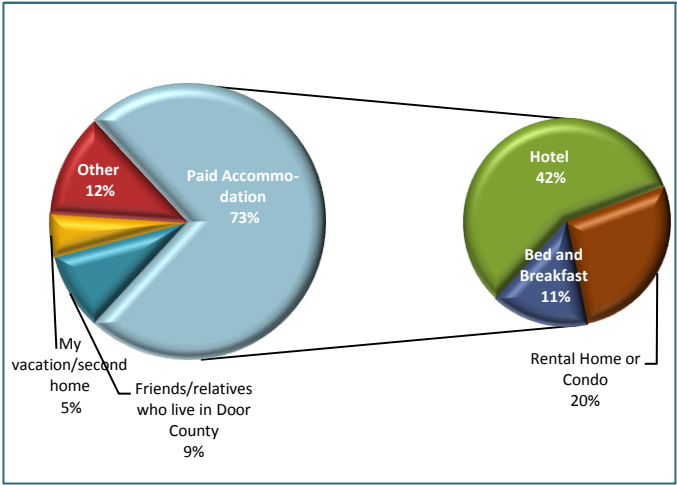
Overall most visitors tend to stay in paid accommodations such as hotels, rental homes or bed and breakfasts, however almost none of the respondents reported their most recent trip was part of a Door County Lodging package.

Accommodation types vary by season with Winter visitors most likely to stay in non-paid accommodations such as their vacation home or with friends and relatives. This would indicate that Winter visitors are more likely to be very regular visitors who consider Door County their second home.

Travel Party



Accommodation Type



Most Visitors are adults and stay in paid accommodations

Door County Most Recent Trip

Activity Participation

Almost everyone who has visited or is planning to visit Door County has or plans to engage in some type of activity while there. It is interesting to note that while expected activity participation is still high, those who have never visited Door County have the lowest expected activity participation rate.

Dining out and experiencing local cuisine as well as touring/sightseeing are among the top three activities of those who have visited as well as those planning to visit. These as well as the other top activities may be possible areas to highlight when promoting Door County.

Winter visitors report the lowest participation or planned participation levels. This adds credibility to the hypothesis that many Winter visitors are regular visitors, visiting their second homes or friends and relatives. They would therefore be less likely to engage in activities than visitors in other seasons.

Respondents were asked if each activity was an important reason for their trip. In all cases the rate of activity participation was greater than it being an important reason for the trip indicating that people engage in a variety of activities when they travel even if activities are not an important reason for their trip.

Top Activities Participated/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 5 1. Touring/sightseeing 2. Dining out/experiencing local cuisine 3. Shopping 4. Visit beach/lake/river/waterfront 5. Browse antique/craft shops	Top 5 1. Dining out/experiencing local cuisine 2. Shopping 3. Touring/sightseeing 4. Visit beach/lake/river/waterfront 5. Visit orchards/farmer’s markets	Top 5 1. Dining out/experiencing local cuisine 2. Touring/sightseeing 3. Visit beach/lake/river/waterfront 4. Visit lighthouses 5. Shopping
Bottom 5 1. Attend Pumpkin Patch Weekend 2. View Spring blossoms 3. Cherry picking 4. Ice fishing (Tie) 5. Cross country skiing (Tie) 6. Snowshoeing (Tie)	Bottom 5 1. Attend Pumpkin Patch Weekend (Tie) 2. Visit health spa/resort (Tie) 3. Attend Sporting Event (Tie) 4. Cross country skiing (Tie) 5. Ice fishing (Tie) 6. Snowshoeing (Tie)	Bottom 5 1. Attend Pumpkin Patch Weekend 2. Attend sporting event 3. Cross country skiing (Tie) 4. Snowshoeing (Tie) 5. Look at real estate (Tie) 6. Ice Fishing (Tie)

Top Door County Activities:

- Dining out/local cuisine
- Touring/sightseeing
- Shopping
- Beach/lake/river/waterfront

Door County Most Recent Trip

Spending During Most Recent Trip

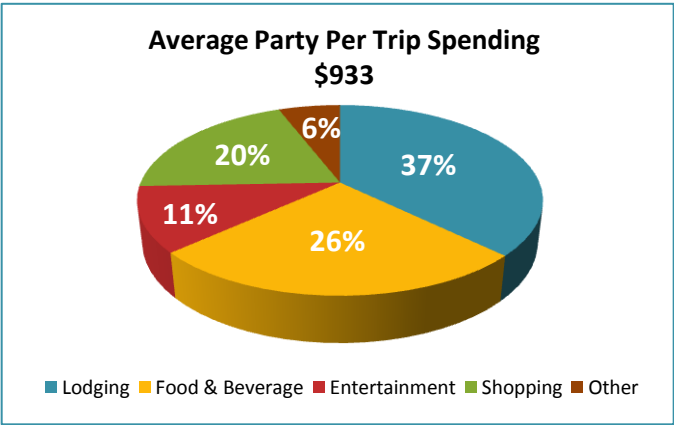
The average travel party, which is between 3 and 4 people, staying an average of 3 to 4 nights, spends approximately \$900 on their trip to Door County. They spend the most during Summer visits with an average reaching close to \$1,000. Summer is followed fairly closely by Fall and then Spring. Winter visitors spend the least at just under \$700.

The largest share of the travel dollar in total and across all seasons goes to Lodging followed by Food and Beverage. Although Lodging still makes up the largest share of spending for Winter visitors, it is much lower than in other seasons and is the

Spending by Season of Visit

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

Party Per Trip Spending



primary reason average spending for winter visitors is so much lower. In addition the cost of the types of accommodations they stay in tends to be much lower than those occupied in other seasons.

The share that is spent on Food and Beverage is similar across seasons, which would indicate that all visitors are taking advantage of Door County eating establishments.

Shopping is highest in the Winter and lowest in the Summer, the share of the travel dollar that is spent on Entertainment is highest in the Summer and Winter and lowest in the Fall and Spring.

Door County Visitors spend:

- Most in Summer
- Least in Winter

Share of Travel Dollar

- Largest on Lodging
- Smallest on Entertainment

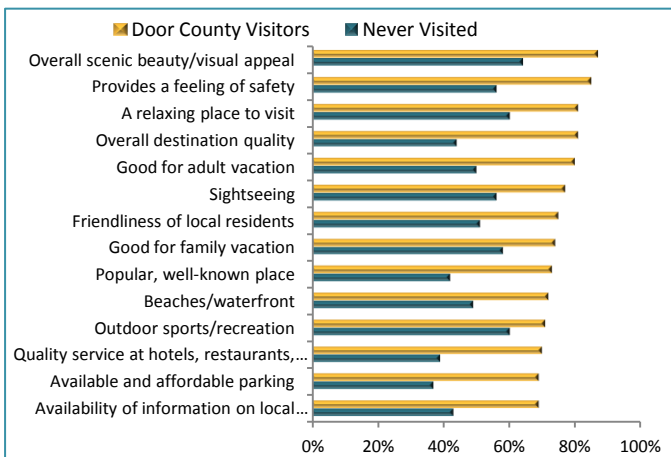
Impressions of Door County

Visitors vs. Those Who Have Never Visited

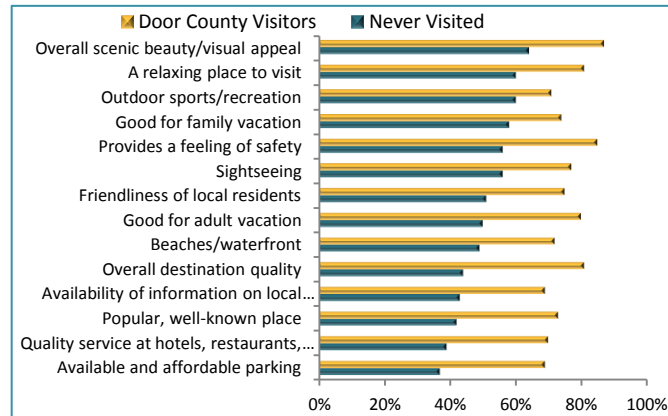
Respondents were asked, based on everything they know about Door County, to rate, on a 7-point scale, their impressions of how well the County delivers on 29 different destination characteristics.

With no exceptions Door County visitors had higher Excellent (top 2 box) impressions of the County than did those who had never visited. In fact, for many characteristics the gaps are quite large with those who have never visited providing fairly low Excellent ratings as compared to visitors. This is most likely due to the fact that the majority of those who have never visited Door County claim they don't know anything about the County.

Top 14 Impressions (Excellent Ratings - rank based on visitors)



Top 14 Impressions (Excellent Ratings - rank based on never visited)



These gaps are likely to be reduced just by getting the word out about Door County's offerings.

Not only are the impressions of visitors and non-visitors different, the ranking of characteristics are different as well. Both give the highest Excellent ratings to Overall Scenic Beauty and Visual Appeal, but Overall Destination Quality which ranks 4th for visitors drops to 10th for those who have never visited with an Excellent rating of almost half that of visitors.

Among seasonal visitors there are very few differences in their impressions of Door County. All visitors to Door County tend to think the County delivers pretty well.

Door County visitors provide much higher Excellent ratings than non-visitors

Impressions of Door County

Importance of Characteristic vs. Impression

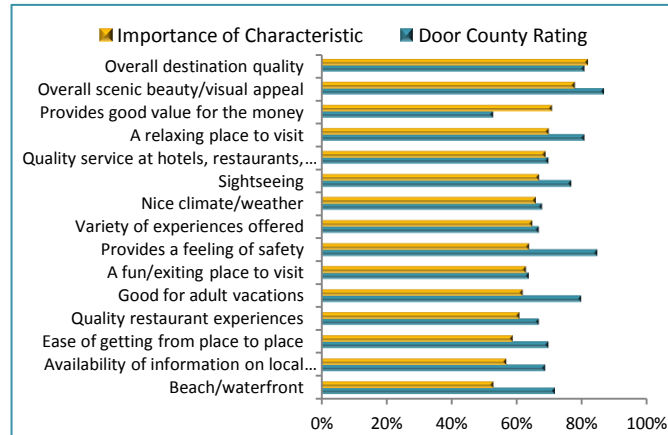
It is also important to look at how impressions compare to the importance of the characteristic in general.

Any characteristic where the blue line exceeds the gold line indicates a characteristic Door County is perceived to deliver very well. If the gold line exceeds the blue line however, Door County is perceived as not meeting the usual expectations travelers have of a destination.

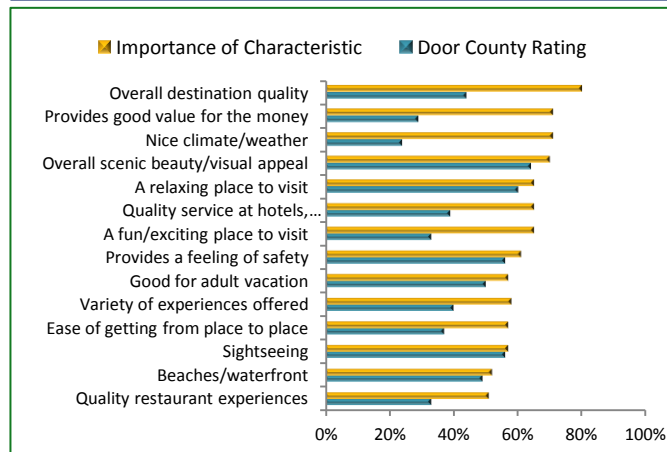
In most cases Door County is delivering what their visitors are looking for. However there are some key characteristics that visitors are not as positive about. They generally expect a slightly better overall destination quality and a much better value for the money at a leisure destination.

Travelers who have never visited Door County have a very low impression of the County as compared to their usual expectations. Particularly for the most important characteristics of Overall Destination Quality and Value for the Money. They expect the County to get close to their expectations for Sightseeing and Beaches/Waterfront. Among some of the less important characteristics not shown on this chart, non-visitors expect Door County to exceed their usual expectations on the characteristics of being Good for a Family Vacation, having Outdoor Sports/Recreation, as well as Fairs, Festivals & Cultural Events and Art Galleries/Antique/Craft Shops.

Visitor Importance vs. Impression (Top characteristics)



Non-visitor Importance vs. Impression (Top characteristics)



Non-visitors' impression of Door County is that it won't meet their usual expectations of a leisure destination

Door County Trip Planning

Who Came and Who Will Come

When asked if the number of trips taken to Door County in the past 12 months were more, less, the same, or the first trip ever, 52% said they took the same number of trips in the past 12 months as in the previous 12 months. Twenty-one percent said they took more and those visiting in Spring and Winter claimed to have taken over 30% more trips in the past 12 months. Fourteen percent of past year visitors to Door County were first timers. Only 12% said they took fewer trips to Door County in the past 12 months than they did the previous 12 months.

Eighty percent of those who traveled to Door County in the past 12

months plan to return at some time in the future. In fact 53% of those who visited in the past 12 months plan to visit again in the next 12 months. Only 16% of past year travelers are definitely not planning to visit again in the next 12 months.

Among those who have never visited Door County, less than 1% say they definitely plan to visit in the next 12 months, but 32% say they might. The remaining 67% are an opportunity and making sure they are educated on what Door County has to offer may convert some of the no's and maybe's to new Door County visitors.

80% of Door County visitors plant to return

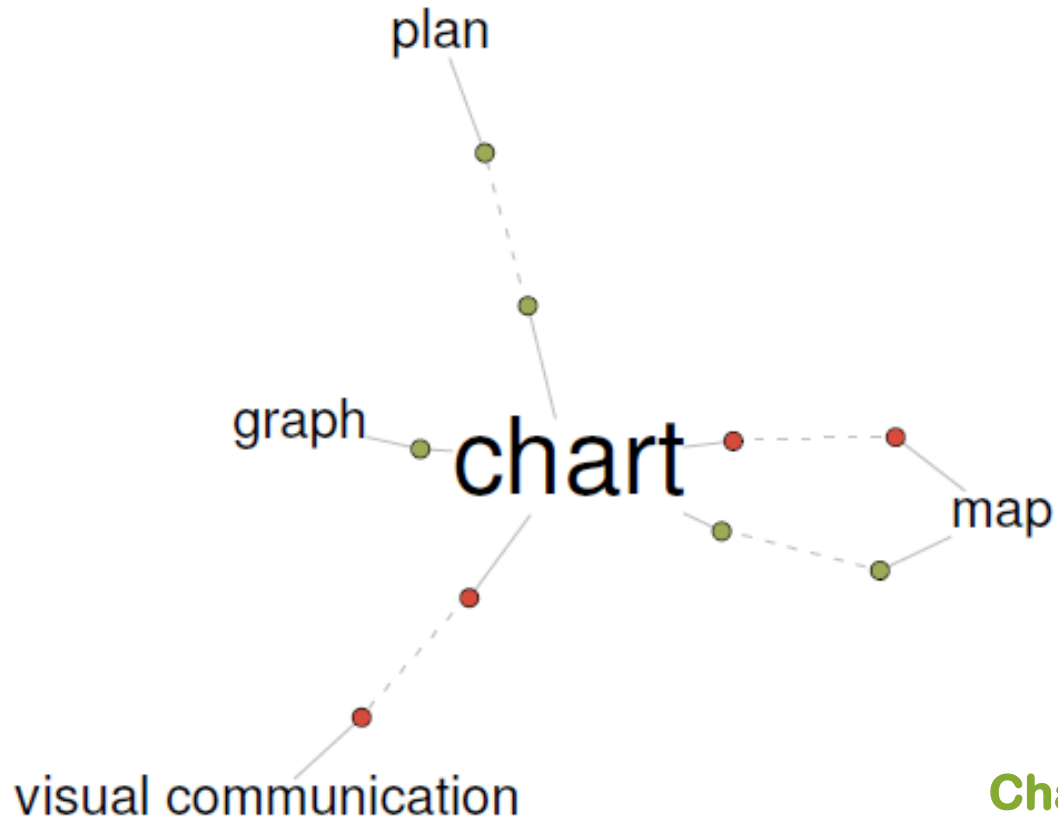
One-third of non-visitors are considering a trip to Door County

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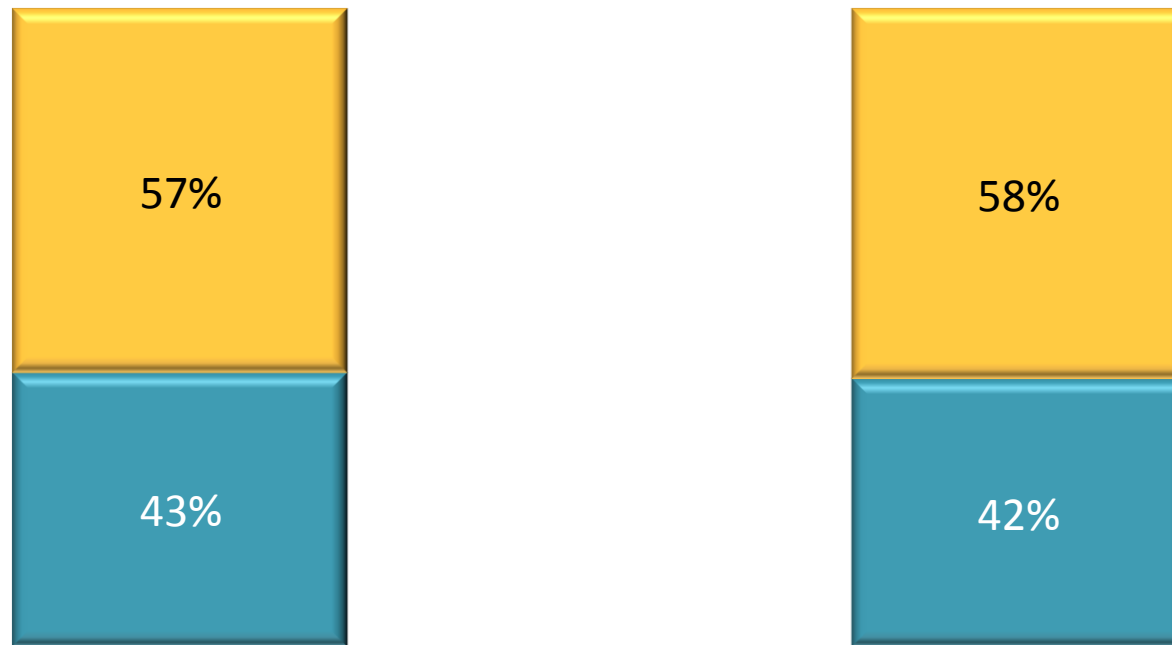
Charts and Graphs

Charts are arranged, as applicable, first by comparing Door County Visitors with those who have Never Visited the County and then by comparing Visitors in each season

Gender

SAMPLE DEMOGRAPHICS

Male Female

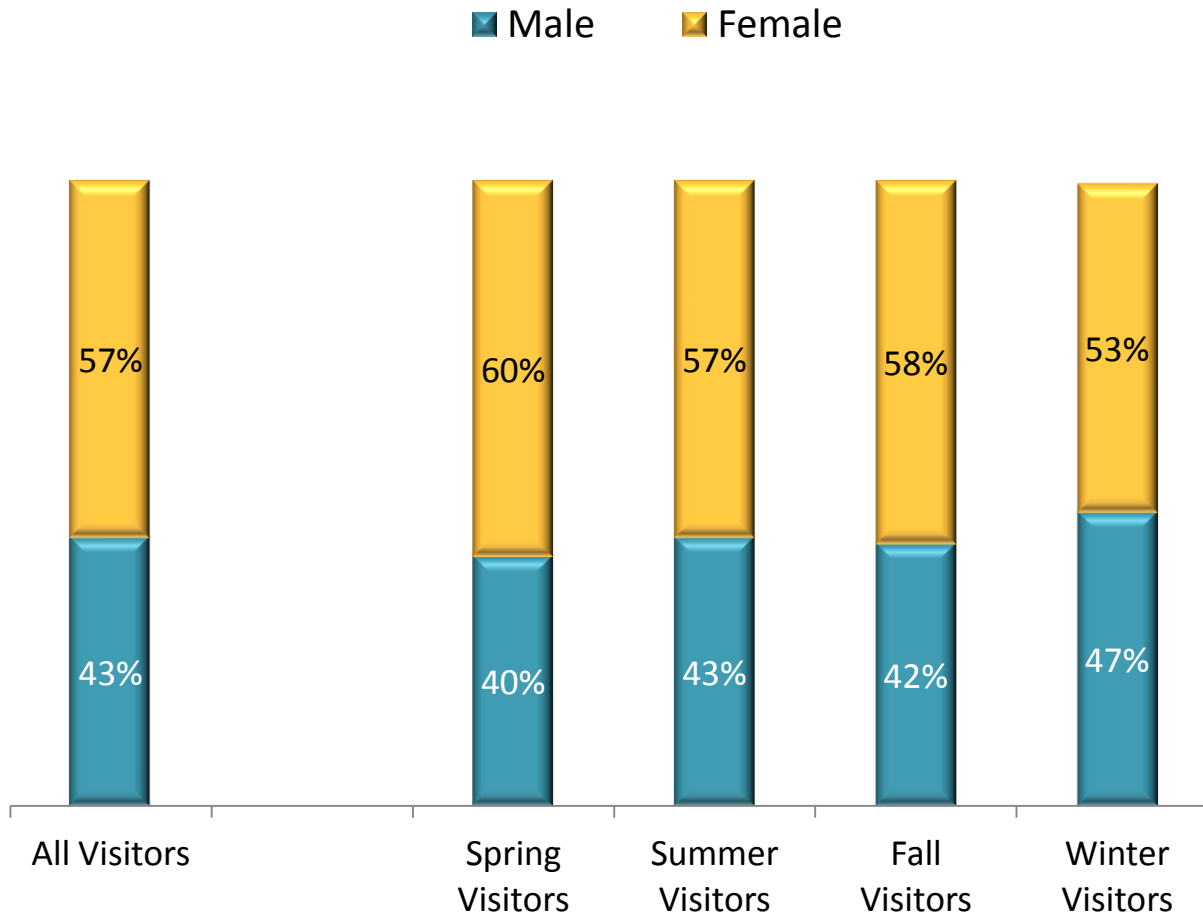


Door County Visitors

Never Visited Door County

Chart 1A/Question 1 • Visitors in past 12 months n=1,074; Never Visited 1,608

Gender

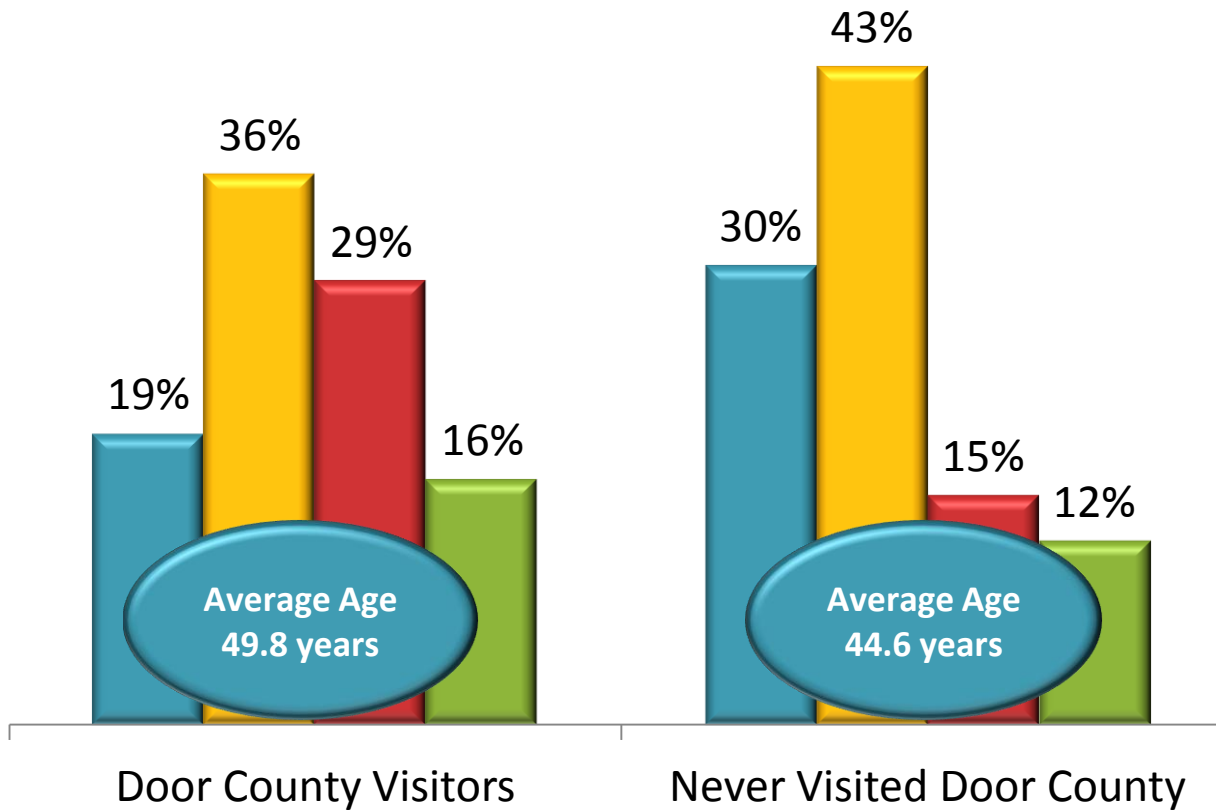


The share of female visitors to Door County is largest in the Spring and the share of male visitors is largest in the Winter.

Chart 1B/Question 1 • Visitors in past 12 months n=1,074; Spring Visitors n=141; Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59

Age

■ 18-34 ■ 35-54 ■ 55-64 ■ 65+



Door County visitors on average are about 5 years older than those who have never visited.

Those over age 55 account for 45% of Door County visitors, but only 27% of non-visitors.

Chart 2A/Question 2 • Visitors in past 12 months n=1,074; Never Visited n=1,608

Age

SAMPLE DEMOGRAPHICS

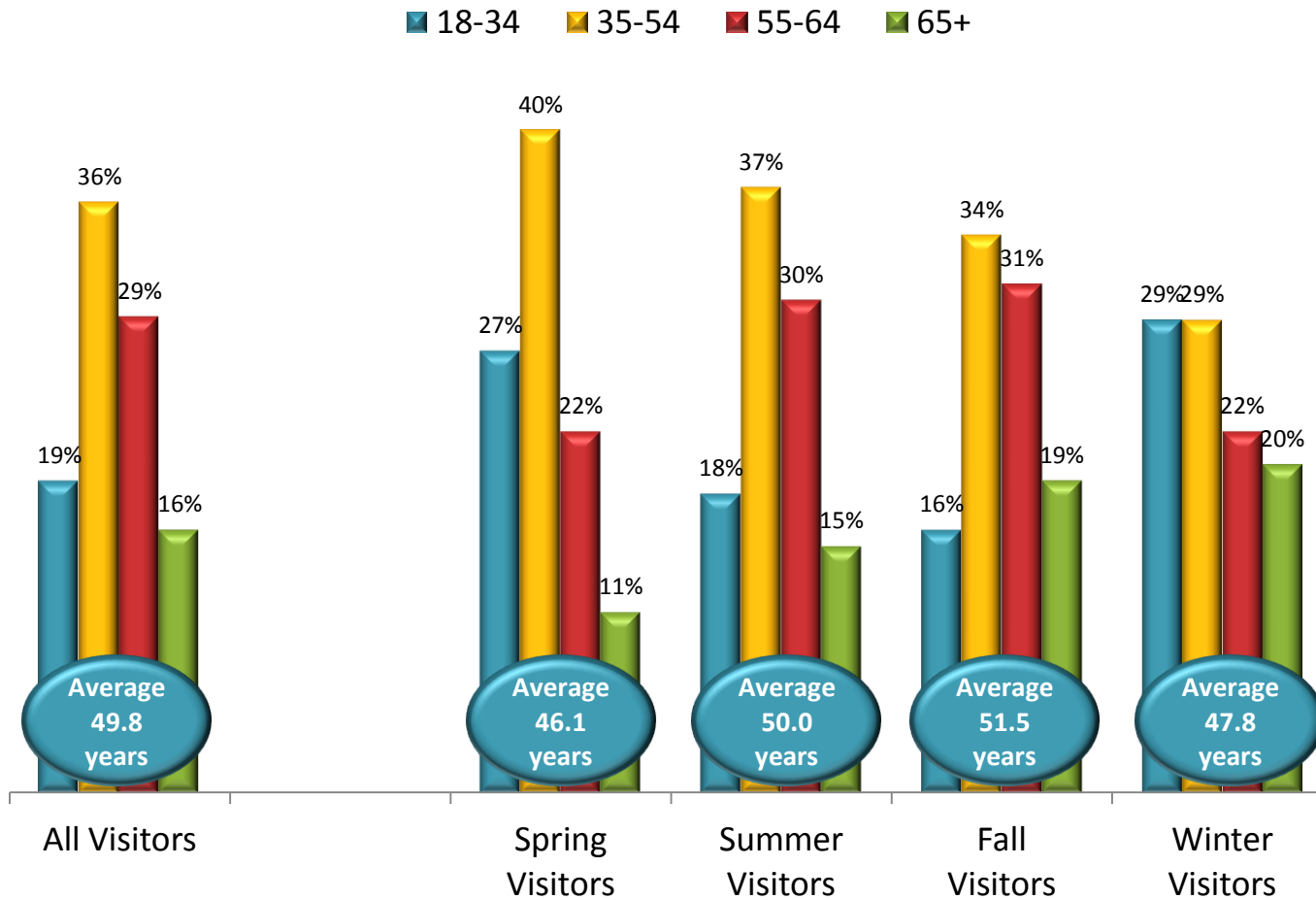


Chart 2B/Question 2 • Visitors in past 12 months n=1,074; Spring Visitors n=141; Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59

Household Income

SAMPLE DEMOGRAPHICS

■ \$50,000-\$74,999 ■ \$75,000-\$99,999 ■ \$100,000-\$124,999 ■ \$125,000+

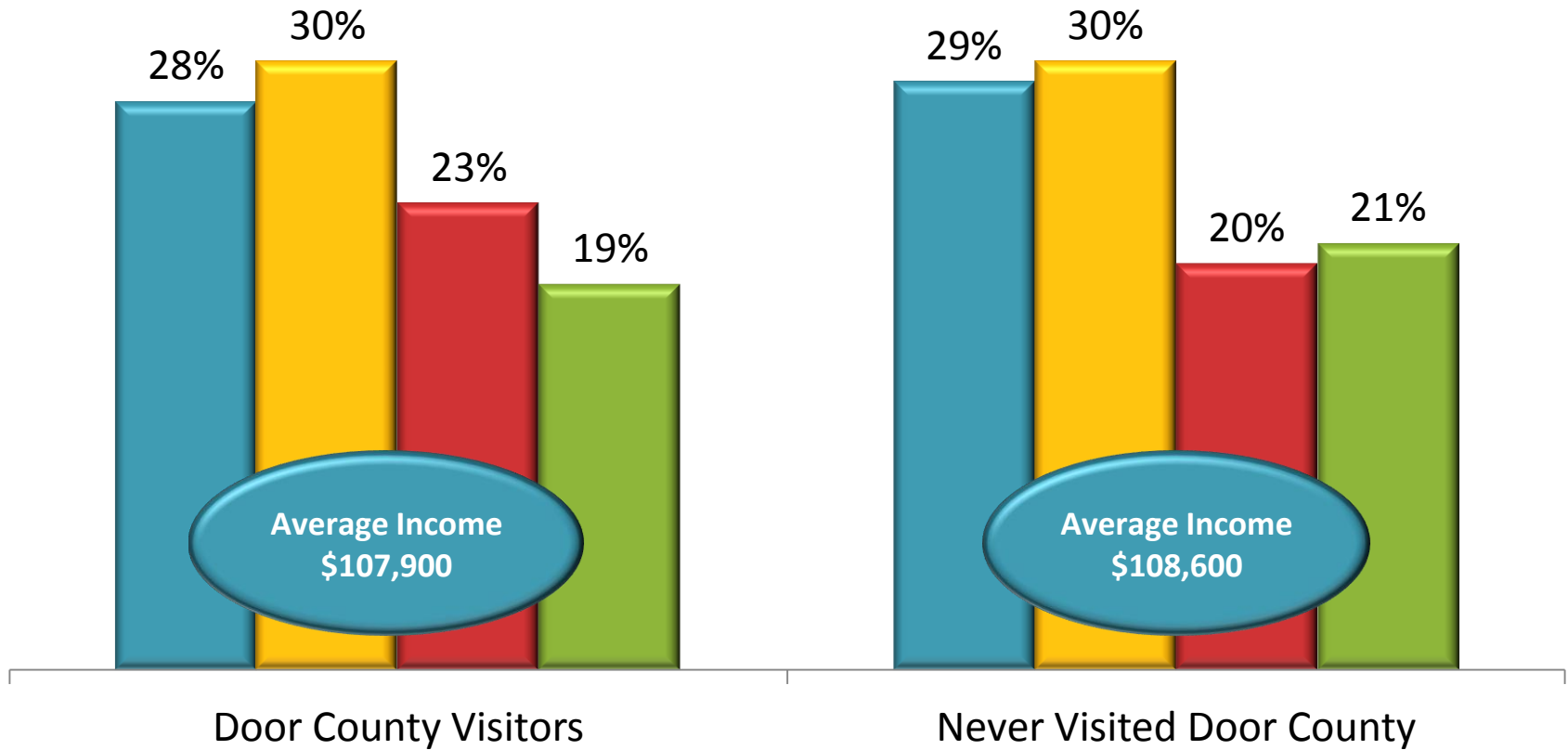


Chart 3A/Question 3 • Visitors in past 12 months n=1,074; Never Visited n=1,608

Note: Sample screened for minimum \$50,000 Household Income

Household Income

SAMPLE DEMOGRAPHICS

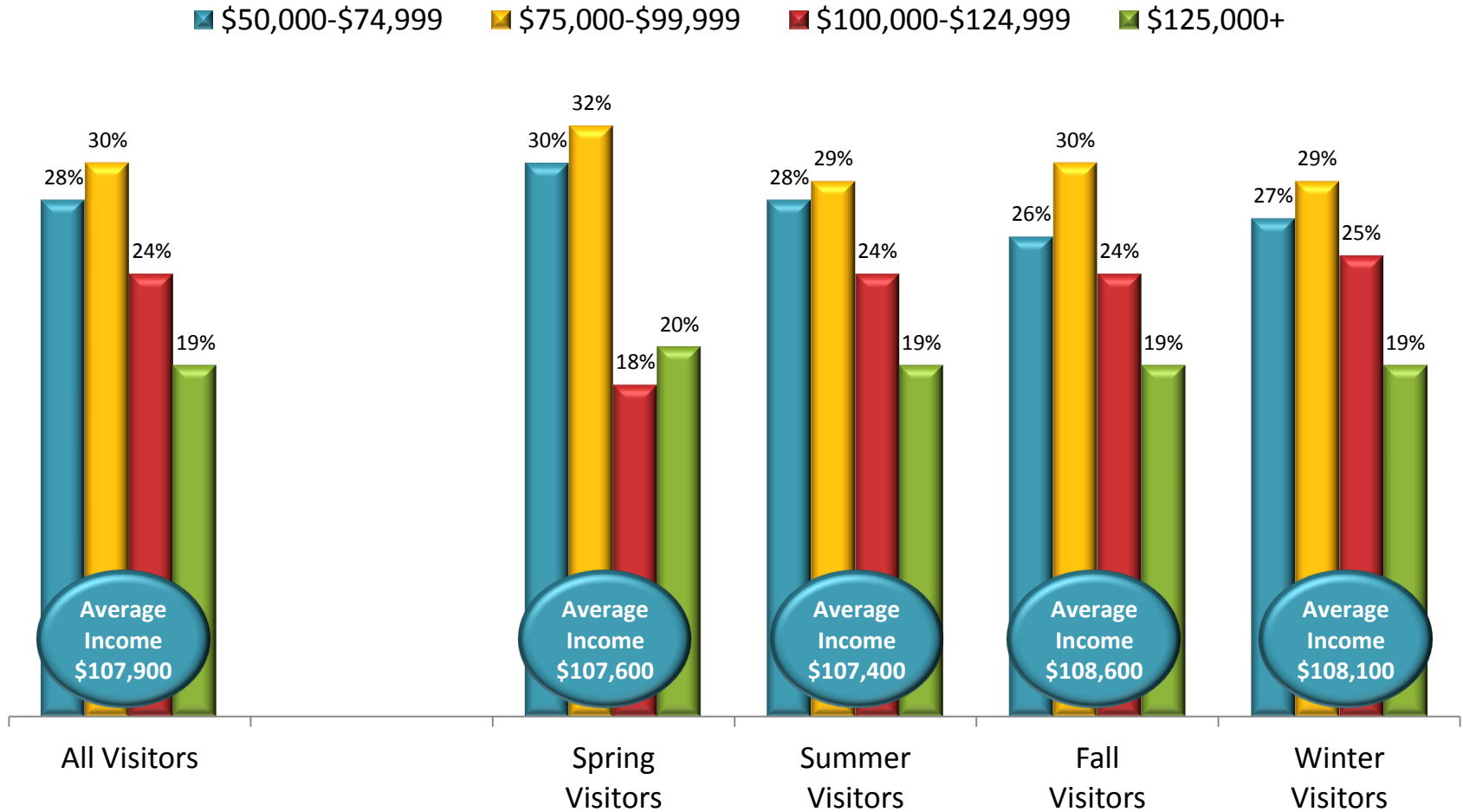
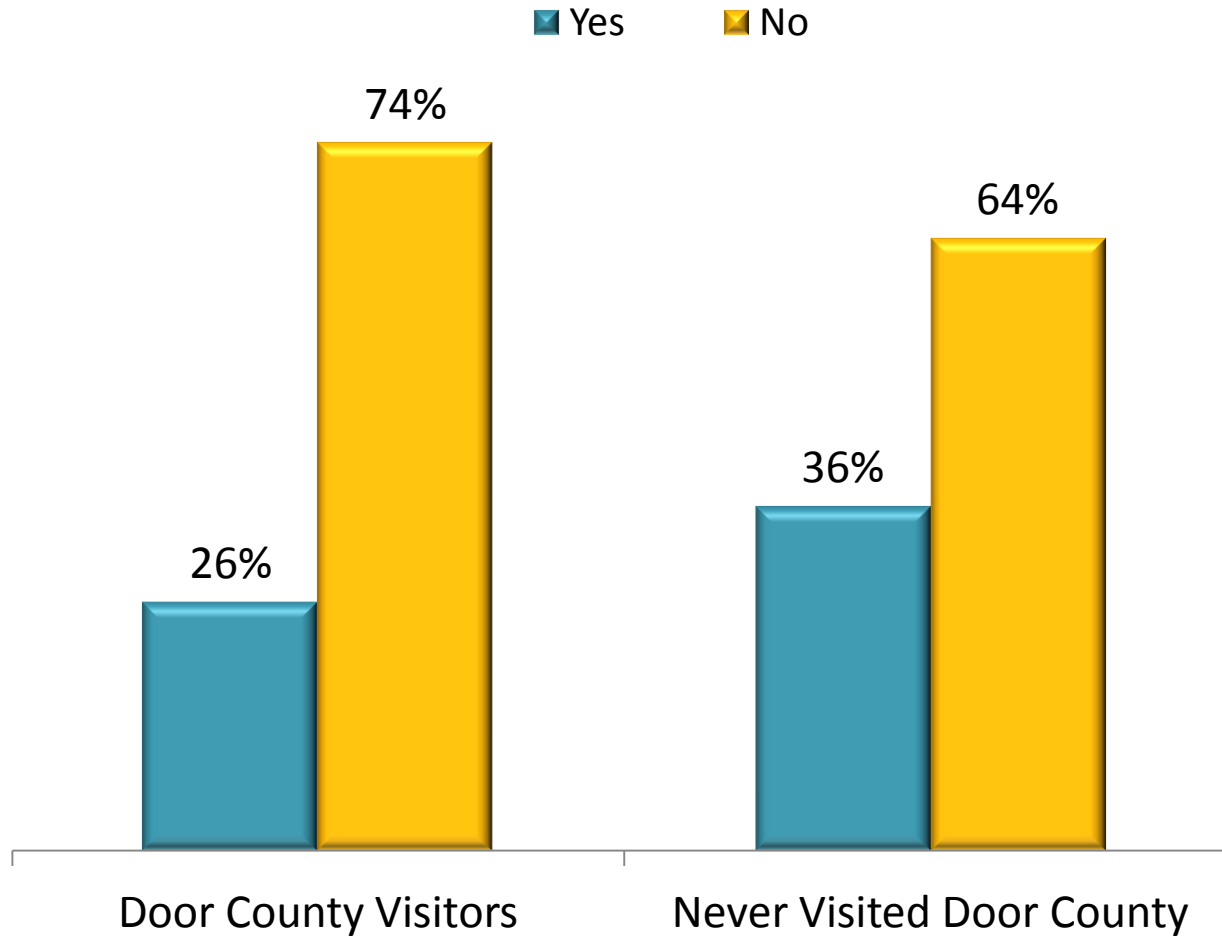


Chart 3B/Question 3 • Visitors in past 12 months n=1,074; Spring Visitors n=141; Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59

Note: Sample screened for minimum \$50,000 Household Income

Children in Household

SAMPLE DEMOGRAPHICS

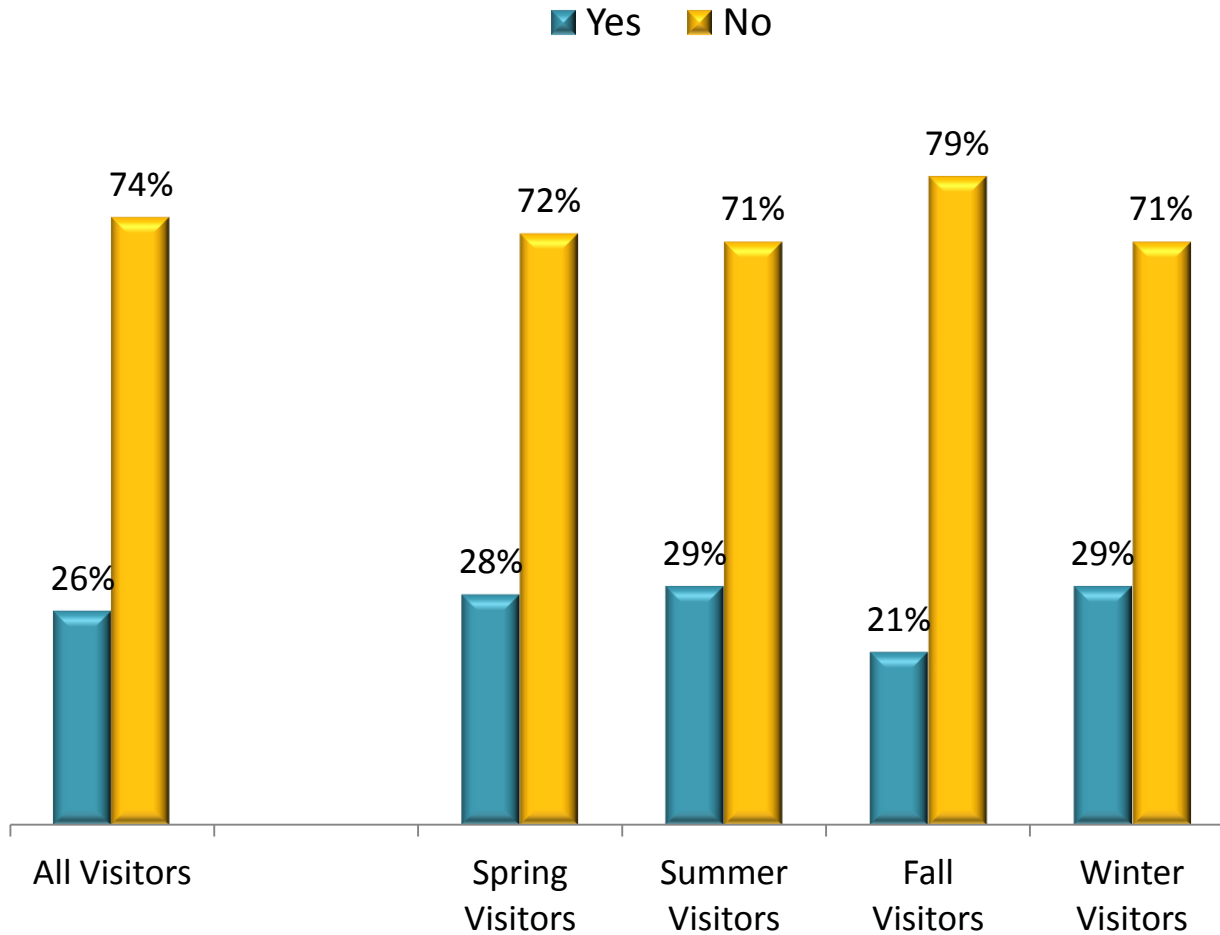


Door County visitors less likely to have kids living in their household.

Chart 4A/Question 4 • Visitors in past 12 months n=1,074; Never Visited n=1,608

Children in Household

SAMPLE DEMOGRAPHICS



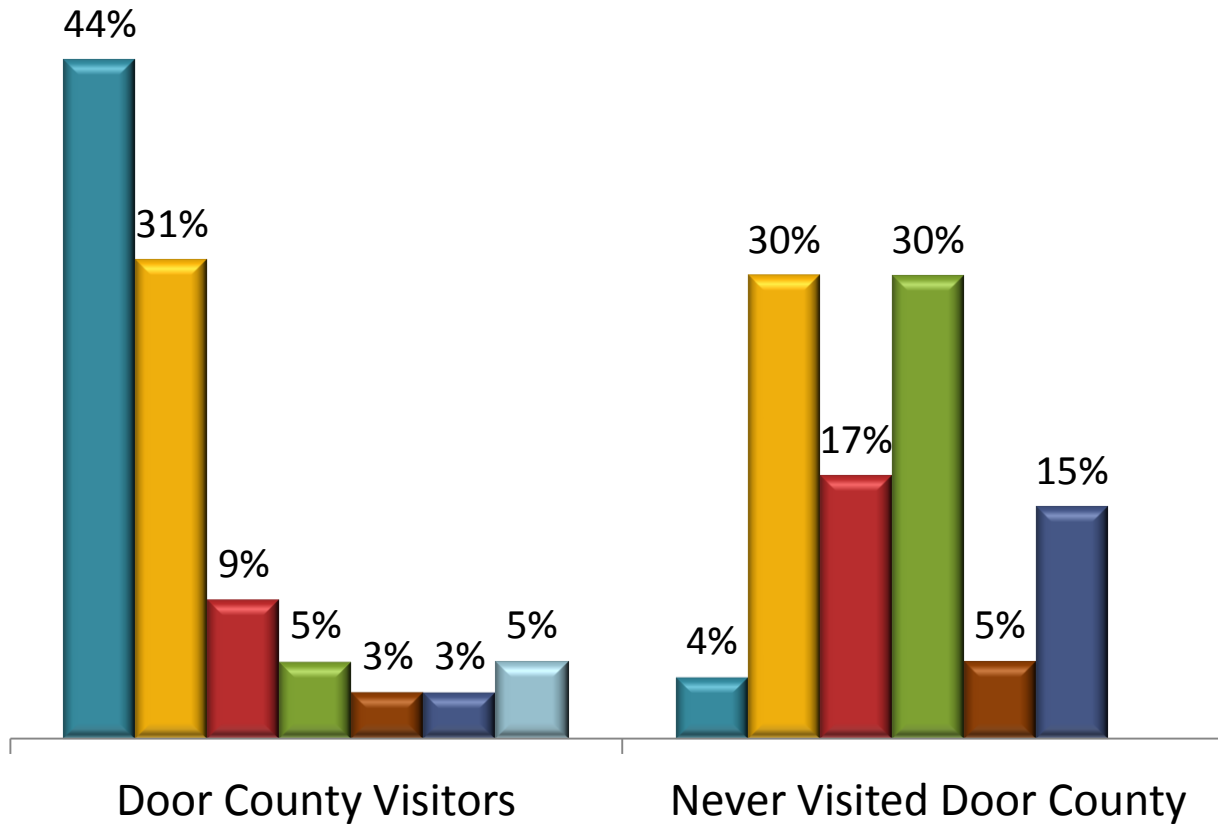
Door County visitors, particularly Fall visitors are less likely to have kids living in their household.

Chart 4B/Question 4 • Visitors in past 12 months n=1,074; Spring Visitors n=141; Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59

Origin State

TRIP ORIGIN

Wisconsin Illinois Minnesota Michigan Iowa Indiana Other



Most people who have never visited, but responded to the survey were from Illinois and Michigan.

Chart 5A/Question 5 • Visitors in past 12 months n=1,074; Never Visited n=1,608
Non-visitors sampled from target states; some Visitors could have been from any state

Origin State

TRIP ORIGIN

■ Wisconsin
 ■ Illinois
 ■ Minnesota
 ■ Michigan
 ■ Iowa
 ■ Indiana
 ■ Other

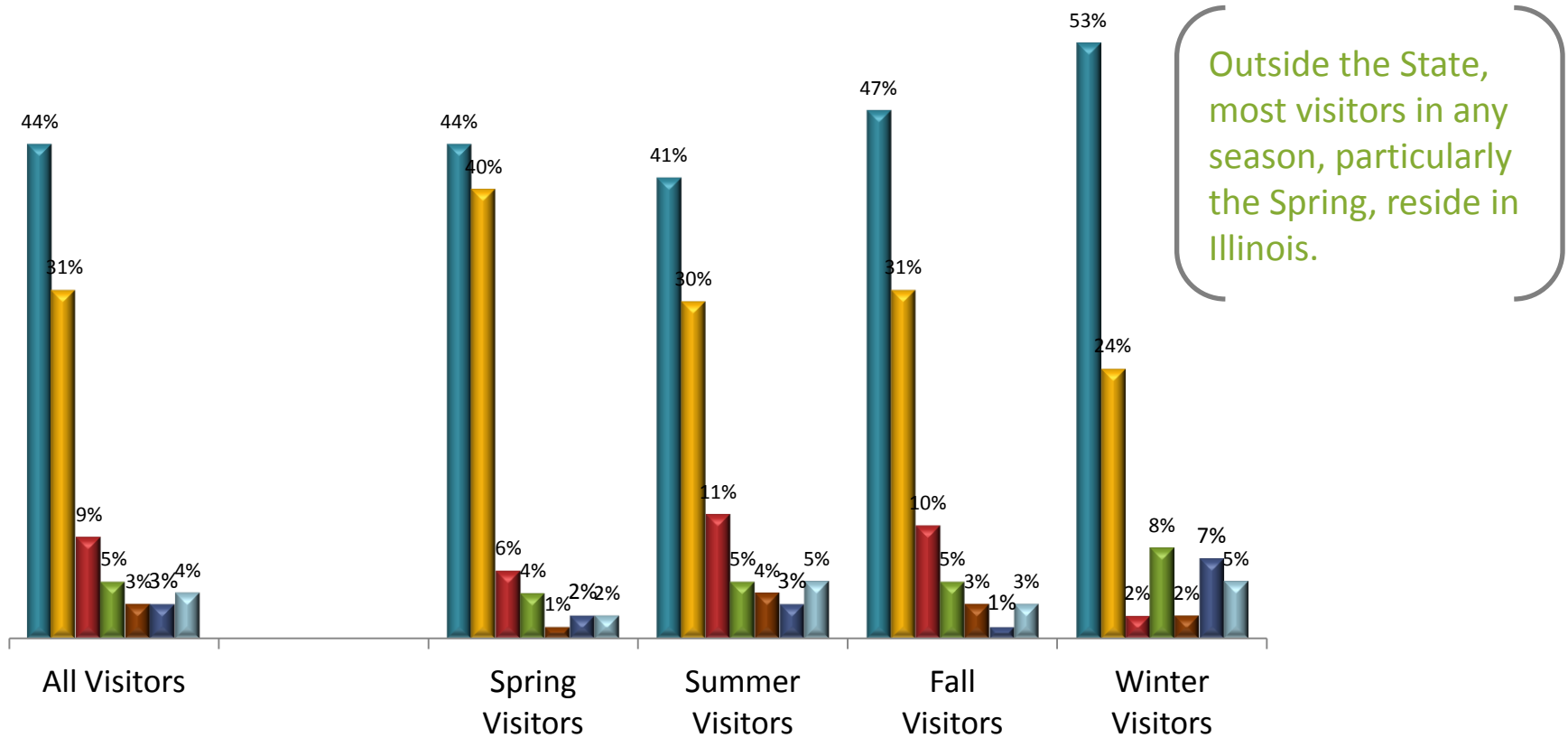


Chart 5B/Question 5 • Visitors in past 12 months n=1,074; Spring Visitors n=141; Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59

Origin State - Visitors

TRIP ORIGIN

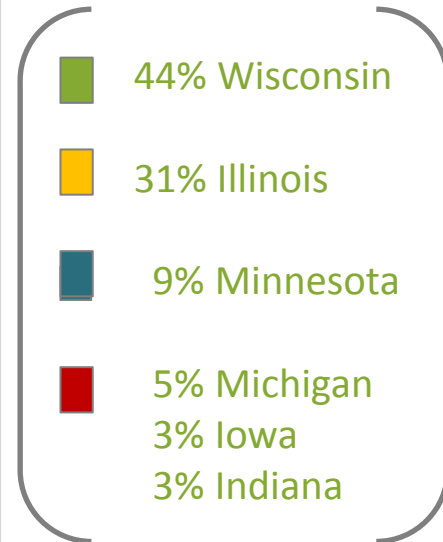
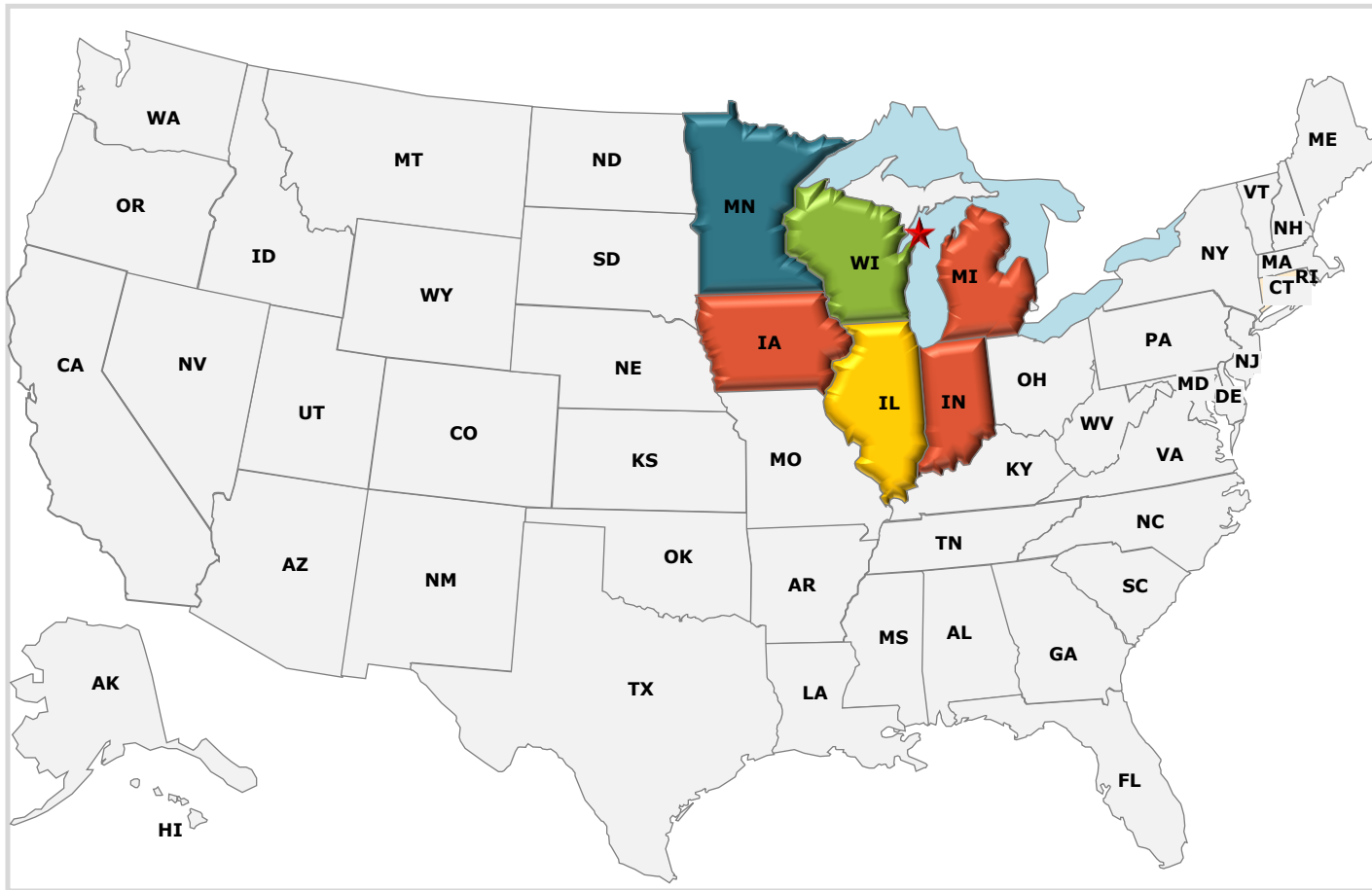


Chart 6/Question 5 • Visitors in past 12 months n=1,074

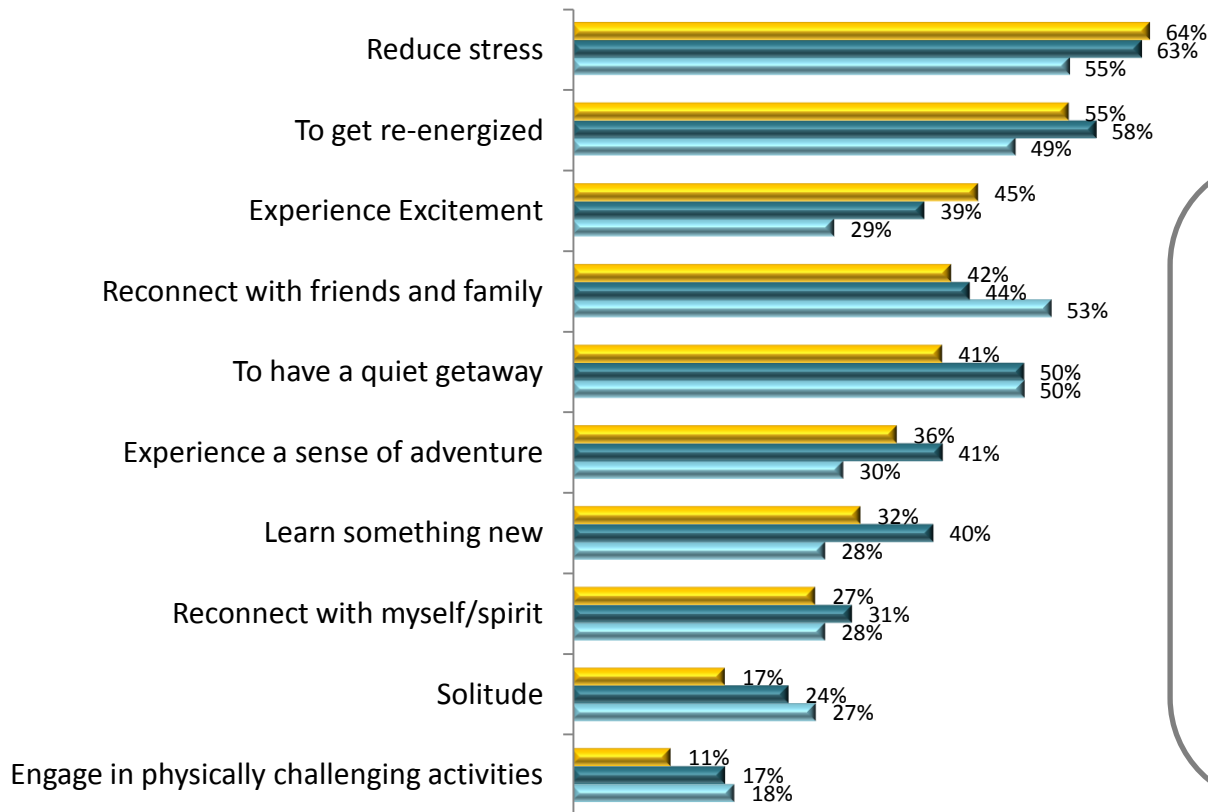
Note: 75% of the visitor sample was limited to the states of Wisconsin, Illinois, Minnesota, Michigan, Iowa and Indiana

Reason for Taking a Leisure Trip

Excellent Ratings (Top 2 Box on a 7-point scale)

MOTIVATION

- Never Visited Door County Travelers Reasons to Travel Anywhere
- Door County Visitors Reasons to Travel Anywhere
- Door County Visitors Reasons to Travel to Door County



Most Recent Trip to Door County was ...

- 38% Couples Getaway
- 32% Family Vacation
- 14% Friend/Group Gathering
- 7% Girlfriend Getaway
- 0% Adventure Travel Group
- 0% Honeymoon
- 8% Other

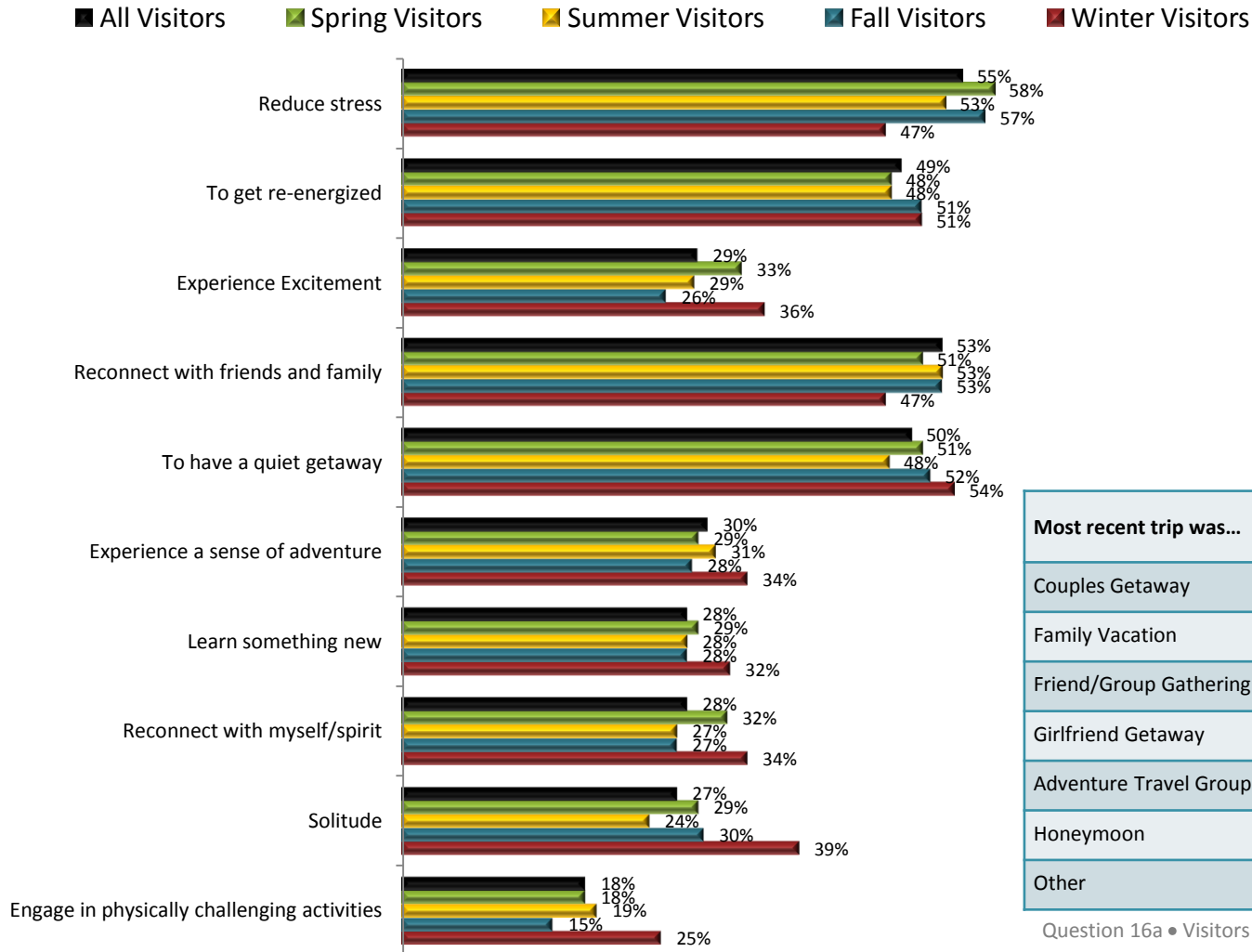
Question 16a • Visitors in past 12 months n=1,074

Chart 7A/Questions 7, 16b • Visitors in past 12 months n=1,074; Never Visited 1,608

Reason for Taking a Leisure Trip to Door County

Excellent Ratings (Top 2 Box on a 7-point scale)

MOTIVATION



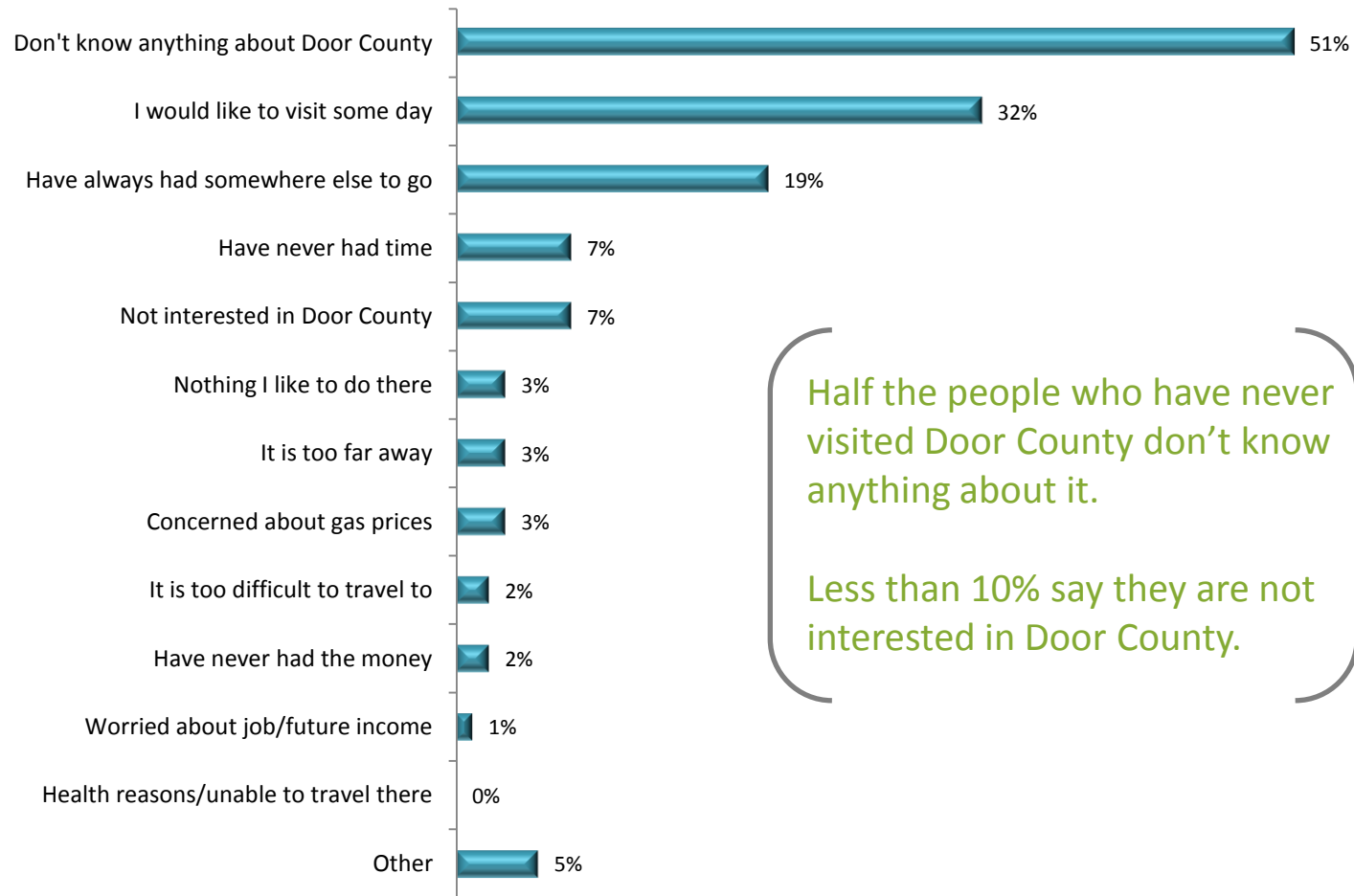
Most recent trip was...	Spring Visitors	Summer Visitors	Fall Visitors	Winter Visitors
Couples Getaway	33%	34%	46%	47%
Family Vacation	33%	38%	23%	27%
Friend/Group Gathering	13%	14%	15%	8%
Girlfriend Getaway	6%	6%	9%	5%
Adventure Travel Group	1%	1%	0%	0%
Honeymoon	0%	0%	0%	0%
Other	13%	7%	8%	12%

Question 16a • Visitors in past 12 months n=1,074

Chart 7B/Question 16b • Visitors in past 12 months n=1,074; Spring Visitors n=141; Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59

Reasons for Never Visiting Door County

MOTIVATION



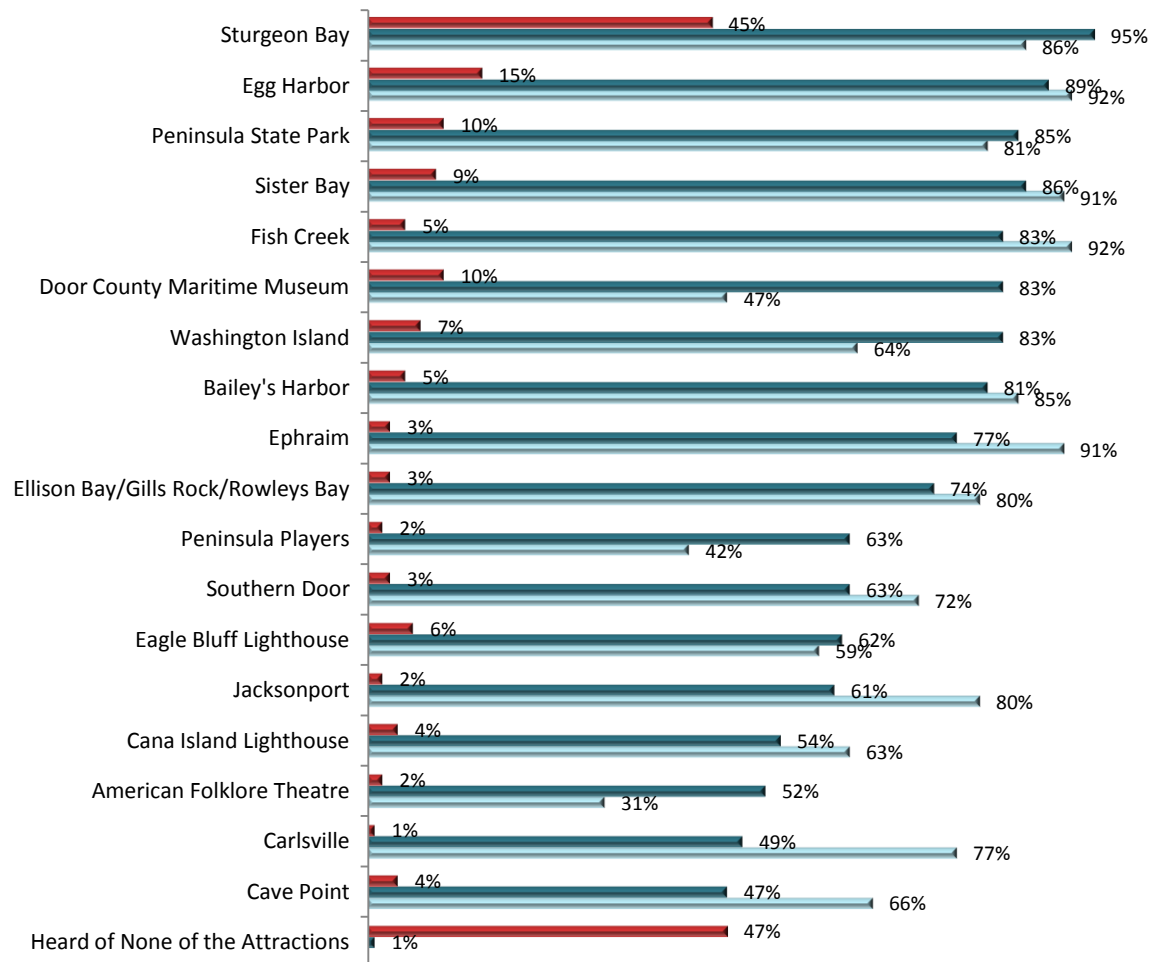
Half the people who have never visited Door County don't know anything about it.

Less than 10% say they are not interested in Door County.

Door County Destination/Attraction Awareness

DESTINATION AWARENESS

■ Never Visited Door County, Heard of.. ■ Door County Visitors, Heard of.. ■ Door County Visitors, Visited



The Door County Visitors, Visited bar (light blue) is the percentage of Door County Visitors who have heard of the destination/attraction and have actually visited.

For example, 47% of Door County Visitors have heard of Cave Point. Of those, 66% have actually visited

Characteristics Important in Choosing *any* Leisure Destination

Excellent Ratings (Top 2 Box on 7 point scale)

MOTIVATION

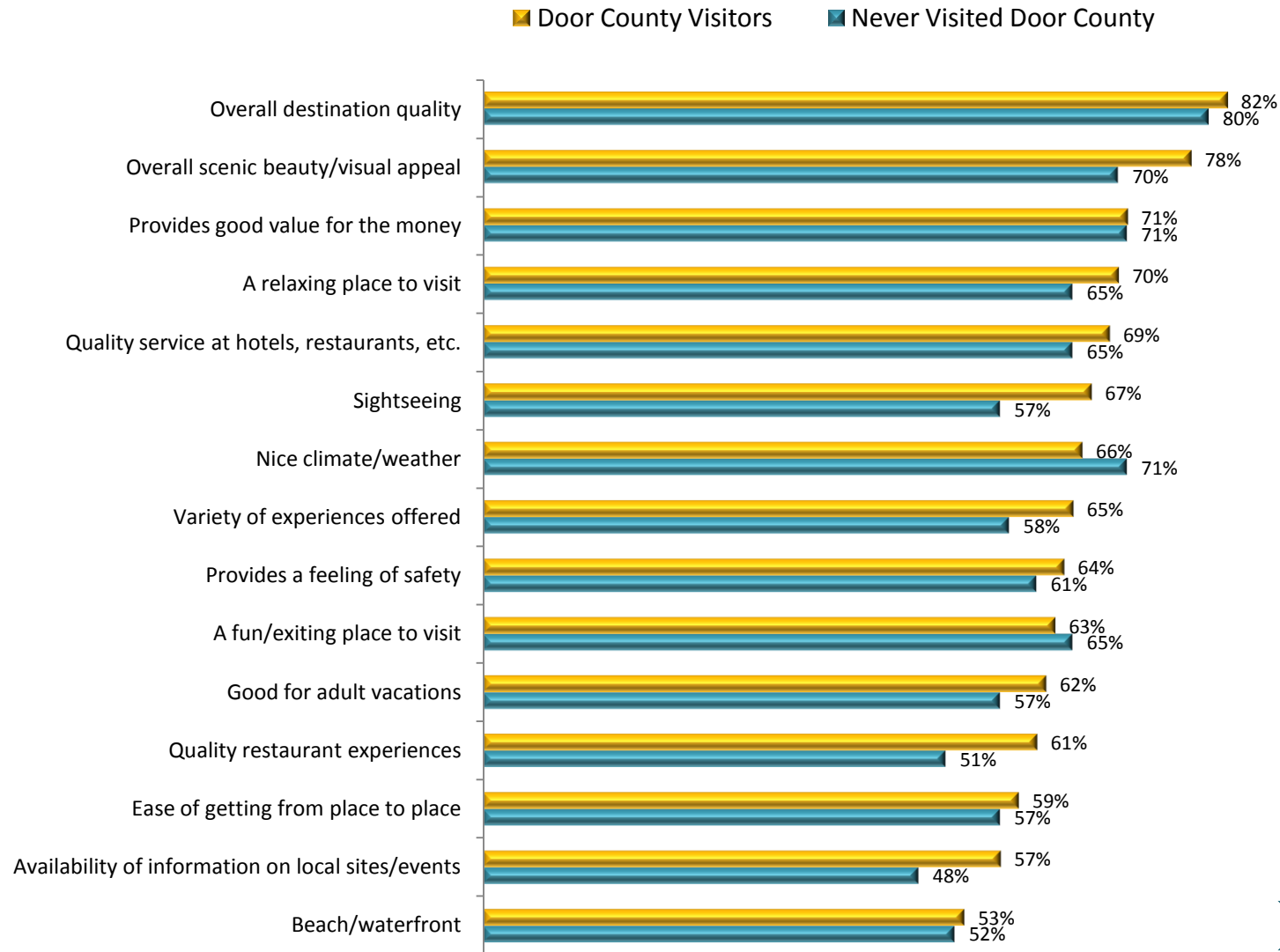


Chart 10A-1/Question 8 • Visitors in past 12 months n=1,074; Never Visited n=1,608

Characteristics Important in Choosing *any* Leisure Destination

Excellent Ratings cont. (Top 2 Box on 7 point scale)

MOTIVATION

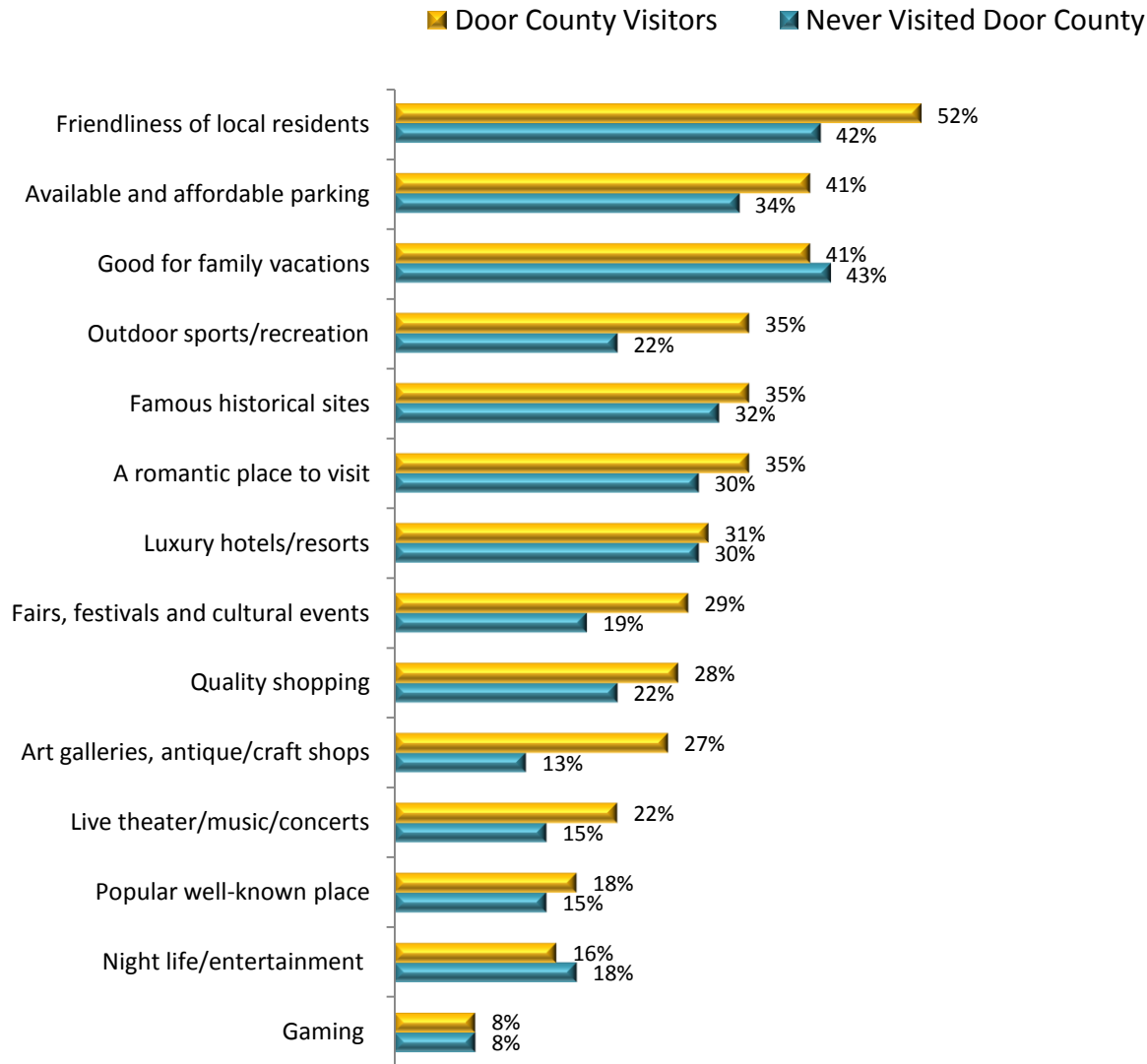
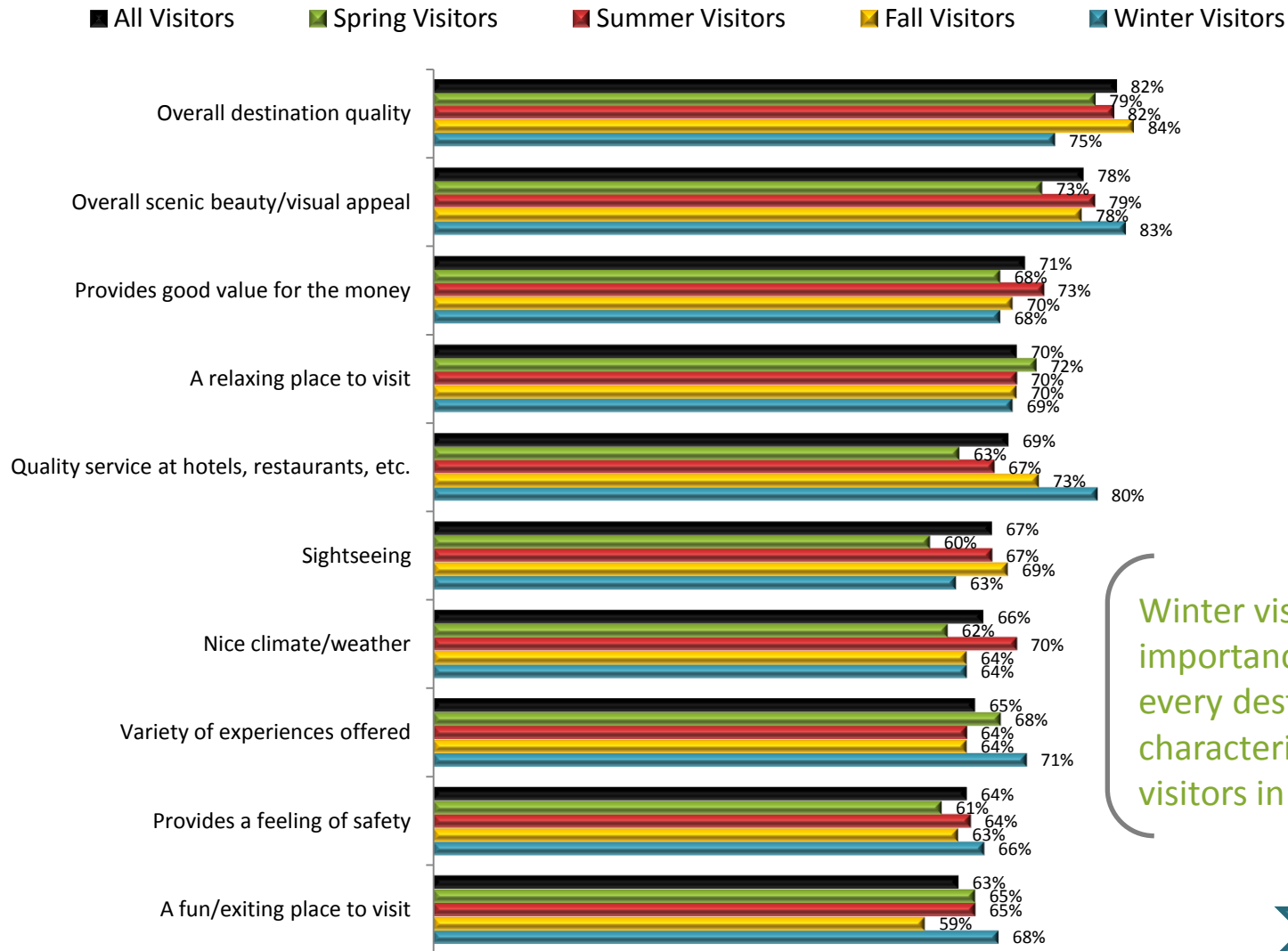


Chart 10A-2/Question 8 • Visitors in past 12 months n=1,074; Never Visited n=1,608

Characteristics Important in Choosing *any* Leisure Destination

Door County Visitors Excellent Ratings (Top 2 Box on 7 point scale)

MOTIVATION



Winter visitors put more importance on almost every destination characteristic than visitors in other seasons

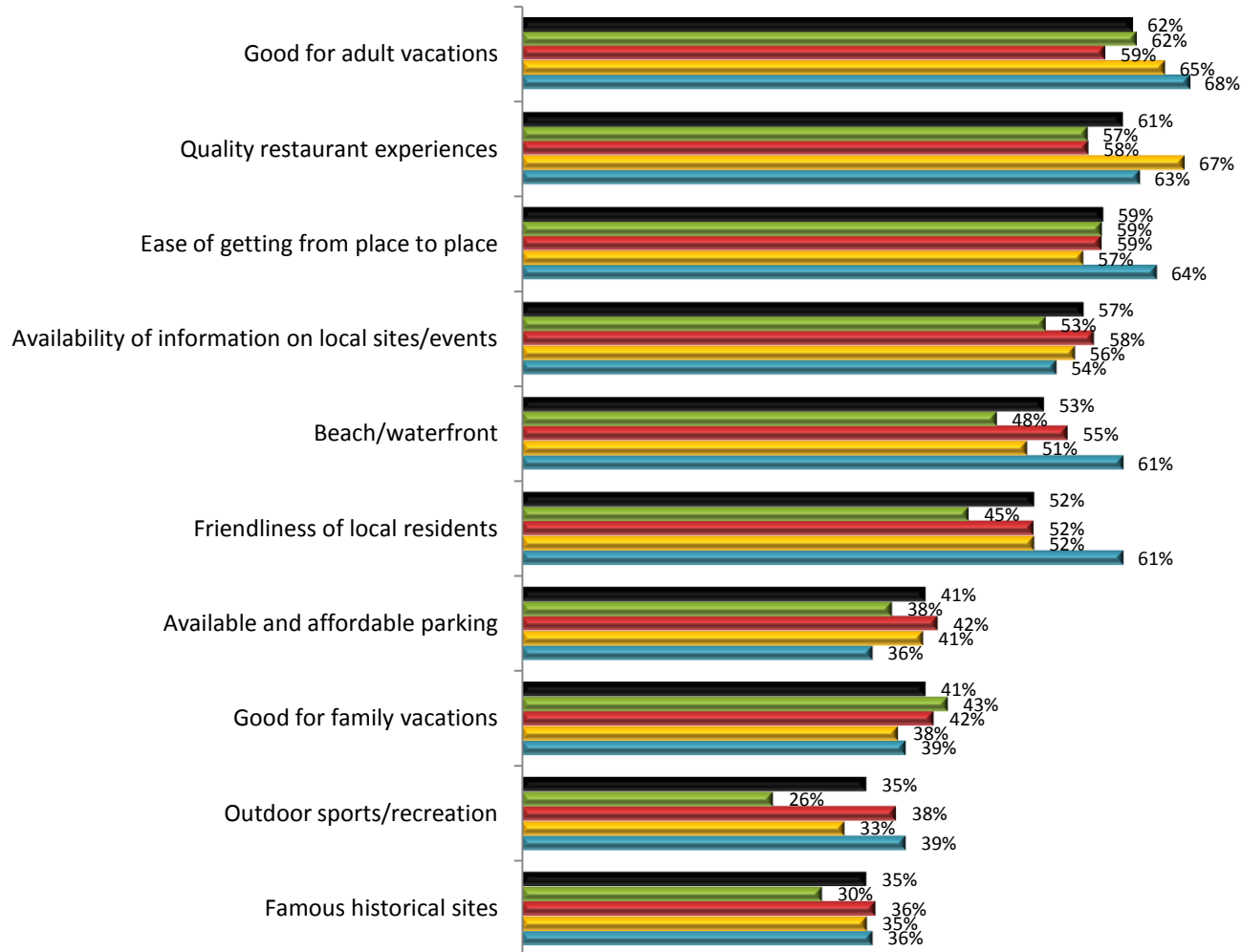


Characteristics Important in Choosing *any* Leisure Destination

Door County Visitors Excellent Ratings cont. (Top 2 Box on 7 point scale)

MOTIVATION

■ All Visitors
 ■ Spring Visitors
 ■ Summer Visitors
 ■ Fall Visitors
 ■ Winter Visitors

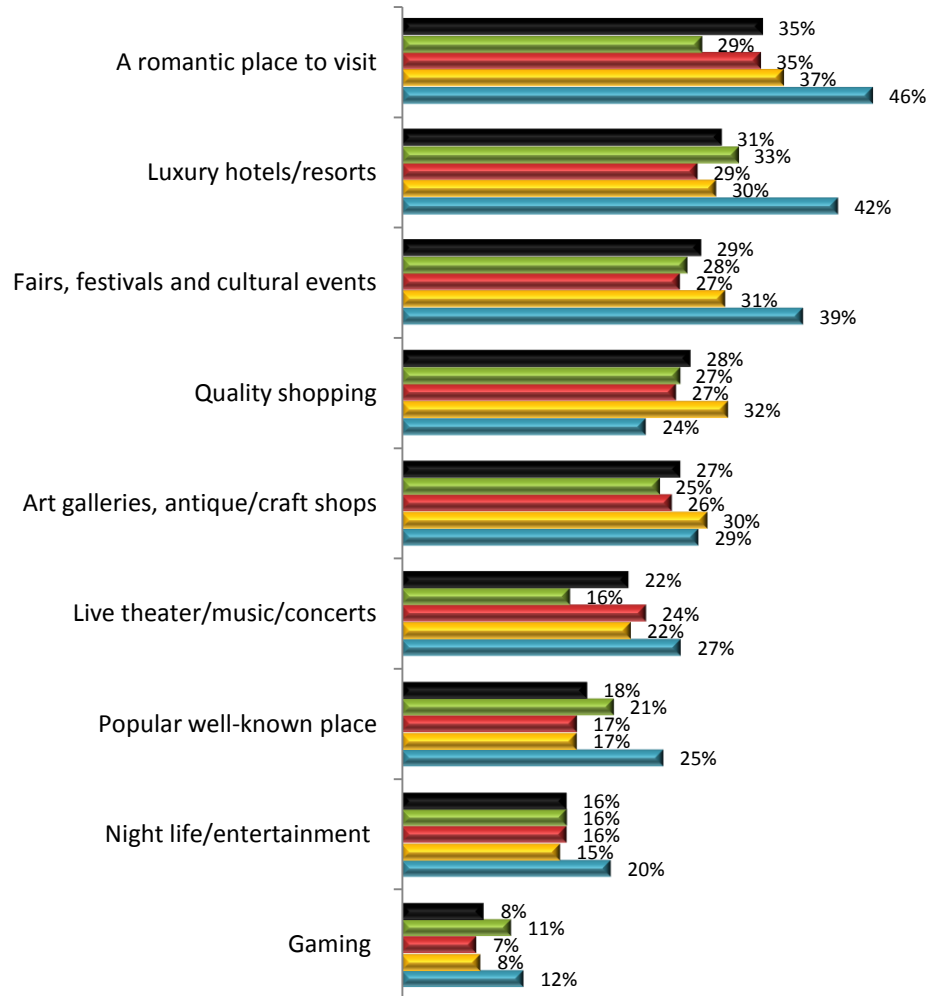


Characteristics Important in Choosing *any* Leisure Destination

Door County Visitors Excellent Ratings cont. (Top 2 Box on 7 point scale)

MOTIVATION

All Visitors
 Spring Visitors
 Summer Visitors
 Fall Visitors
 Winter Visitors



Average Number of Weeks to Plan a Leisure trip *Anywhere*

TRIP PLANNING

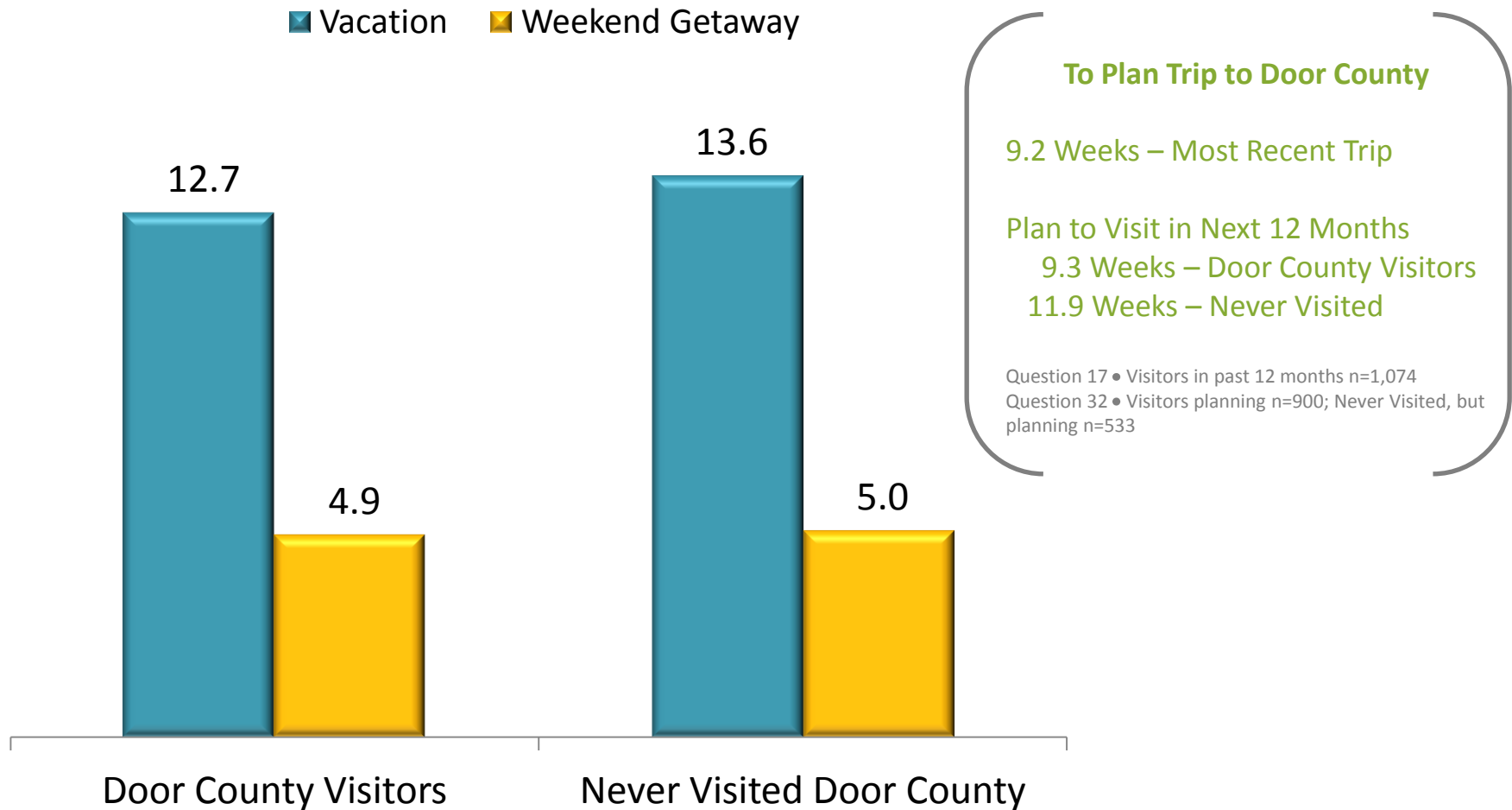
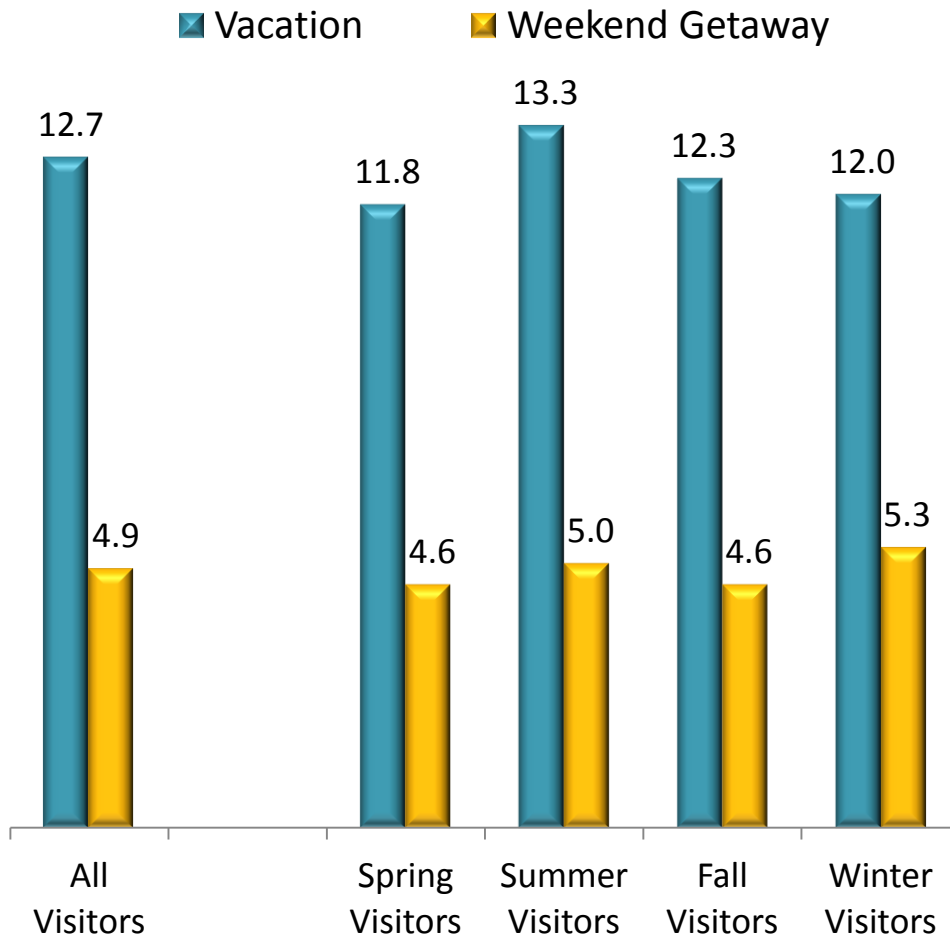


Chart 11A/Questions 9, 10 • Visitors in past 12 months n=1,074; Never Visited n=1,608

Average Number of Weeks for Door County Visitors to Plan a Leisure trip *Anywhere*



Weeks to Plan Trip to Door County				
Q17 - Visitors in past 12 months				
Q32 - Visitors planning to visit in next 12 months				
	Spring Visitors	Summer Visitors	Fall Visitors	Winter Visitors
Most Recent	7.9	9.9	9.2	6.4
Within Next 12 Months – Visitors	8.5	9.9	9.2	6.4

Chart 11B/Questions 9, 10 • Visitors in past 12 months n=1,074; Spring Visitors n=141; Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59

Sources of Information Influential in Choosing *any* Leisure Destination

Excellent Ratings (Top 2 Box on 7 point scale)

SOURCES OF INFORMATION

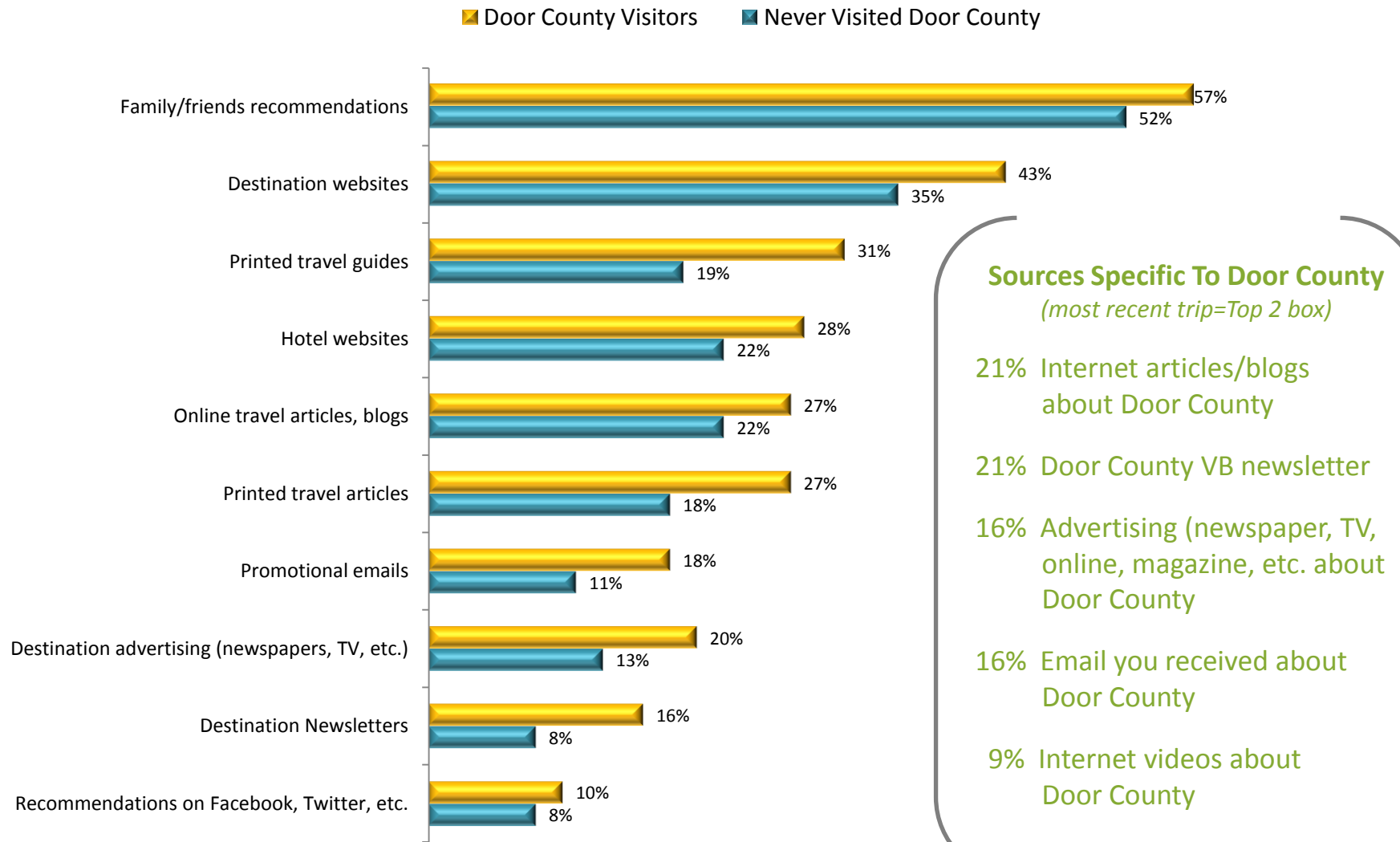


Chart 12A/Question 11 • Visitors in past 12 months n=1,074; Never Visited n=1,608

Sources of Information Influential in Choosing *any* Leisure Destination

Door County Visitors Excellent Ratings (Top 2 Box on 7 point scale)

SOURCES OF INFORMATION

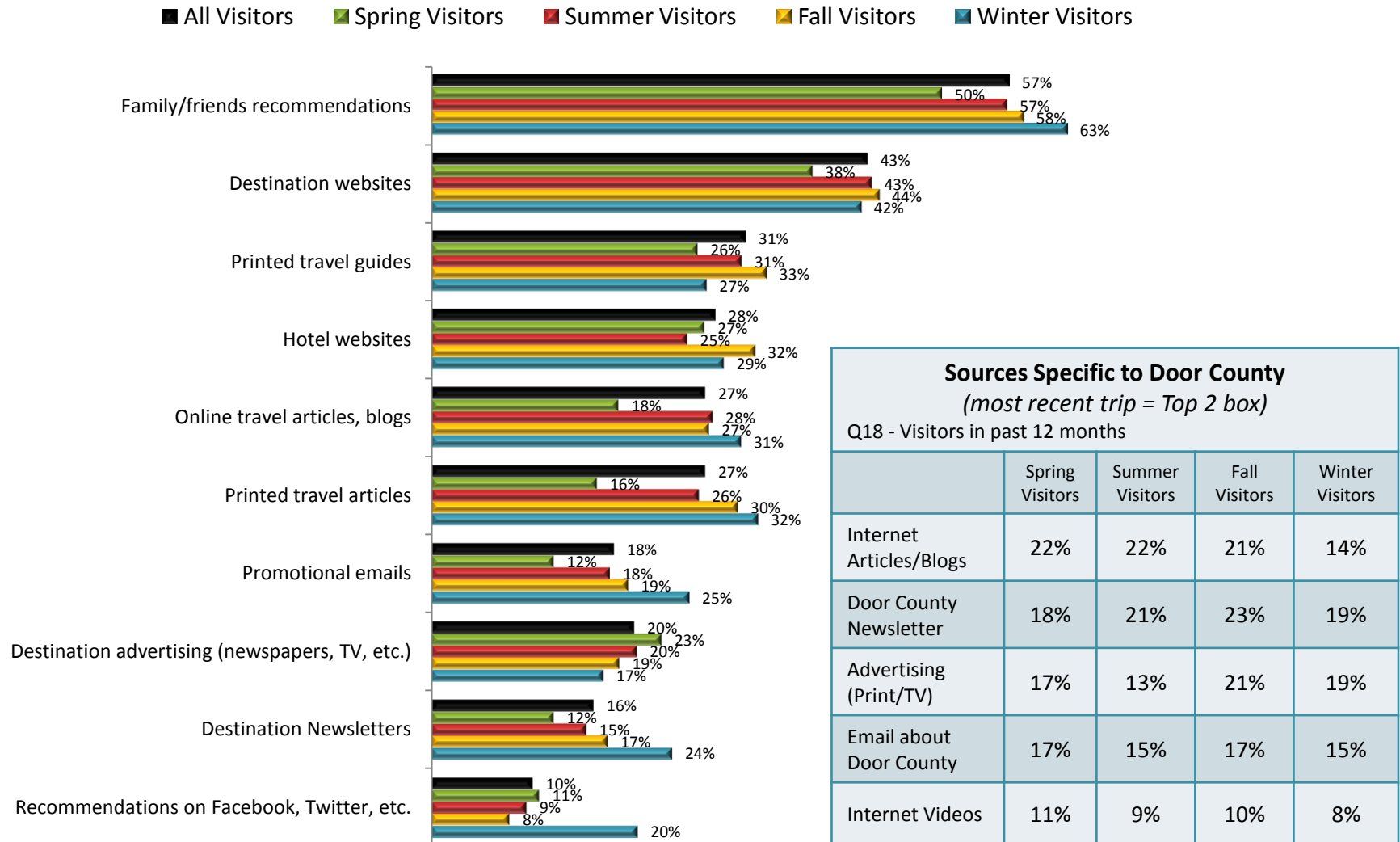
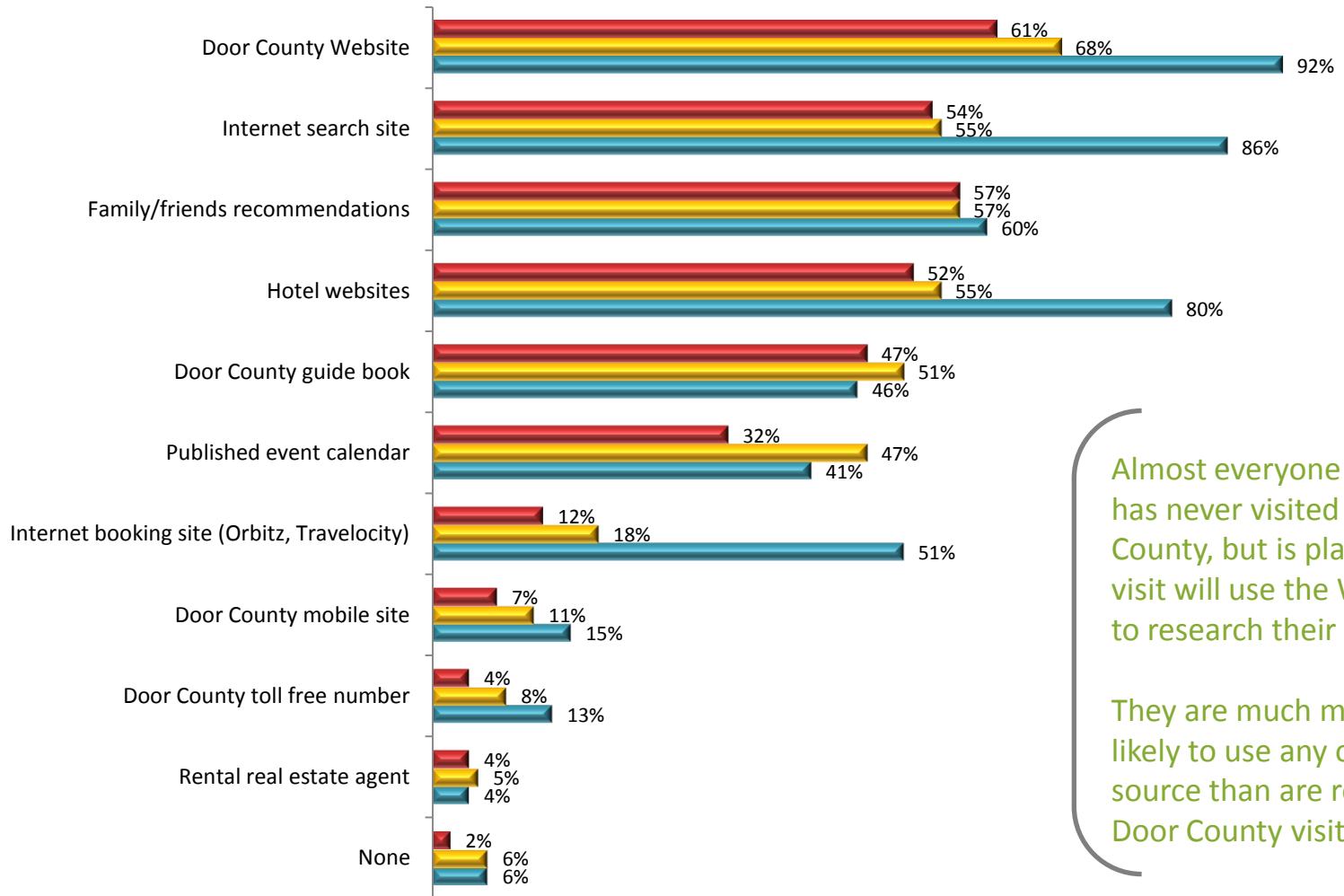


Chart 12B/Question 11 • Visitors in past 12 months n=1,074; Spring Visitors n=141; Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59

Sources of Information Used to Plan a Door County Trip

SOURCES OF INFORMATION

■ Visitors in Past 12 Months
 ■ Visitors Planning in Next 12 Months
 ■ Never Visited, but Planning in Next 12 Months



Almost everyone who has never visited Door County, but is planning to visit will use the Website to research their trip. They are much more likely to use any online source than are regular Door County visitors.

Sources of Information Used to Plan Most Recent Trip to Door County

SOURCES OF INFORMATION

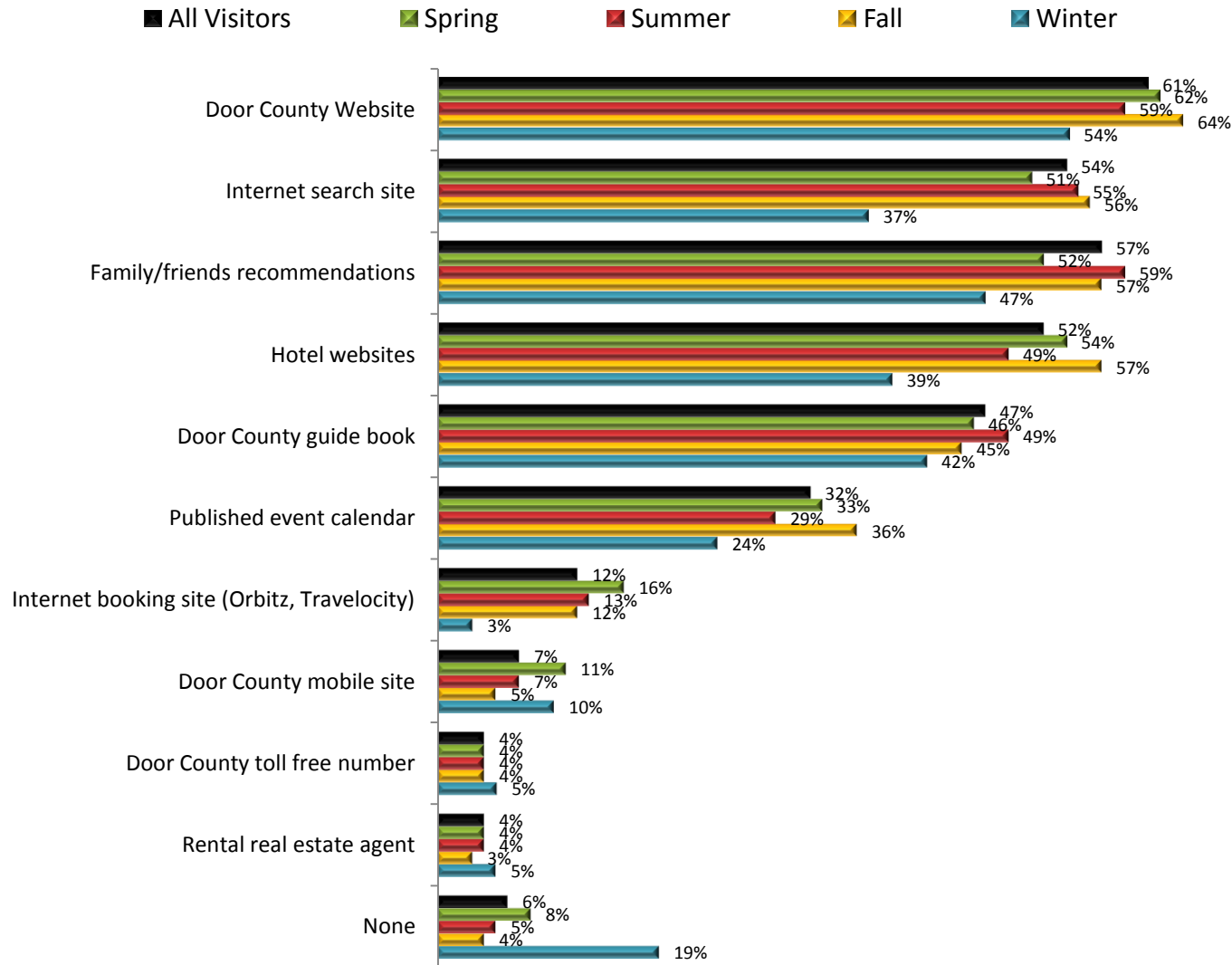
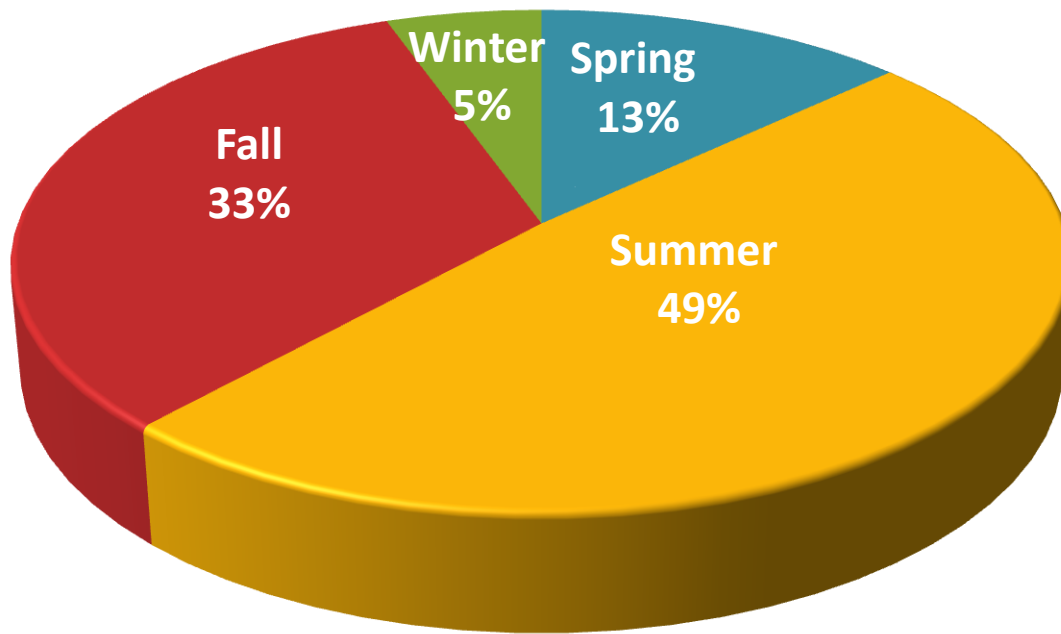


Chart 13B/Question 26 • Visitors in past 12 months n=1,074; Spring Visitors n=141; Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59

Season of Most Recent Visit to Door County



More than 80% of those surveyed last visited Door County in the Summer or Fall seasons.

Chart 14/Question 19 • Visitors in past 12 months n=1,074

Travel Party Composition on Most Recent Trip to Door County

DOOR COUNTY TRIP

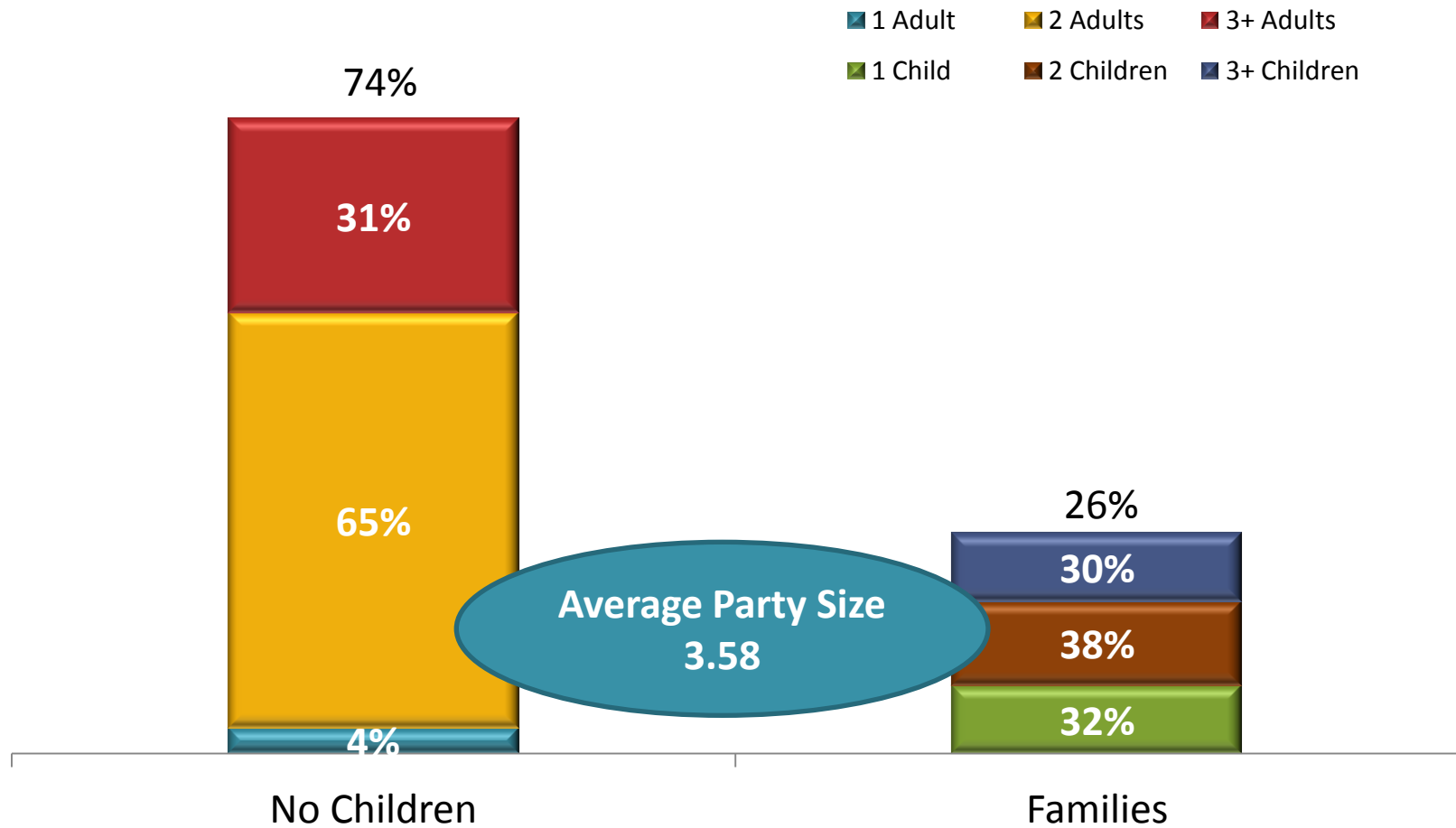


Chart 15A/Question 20 • Visitors in past 12 months n=1,074

Travel Party Composition on Most Recent Trip to Door County

DOOR COUNTY TRIP

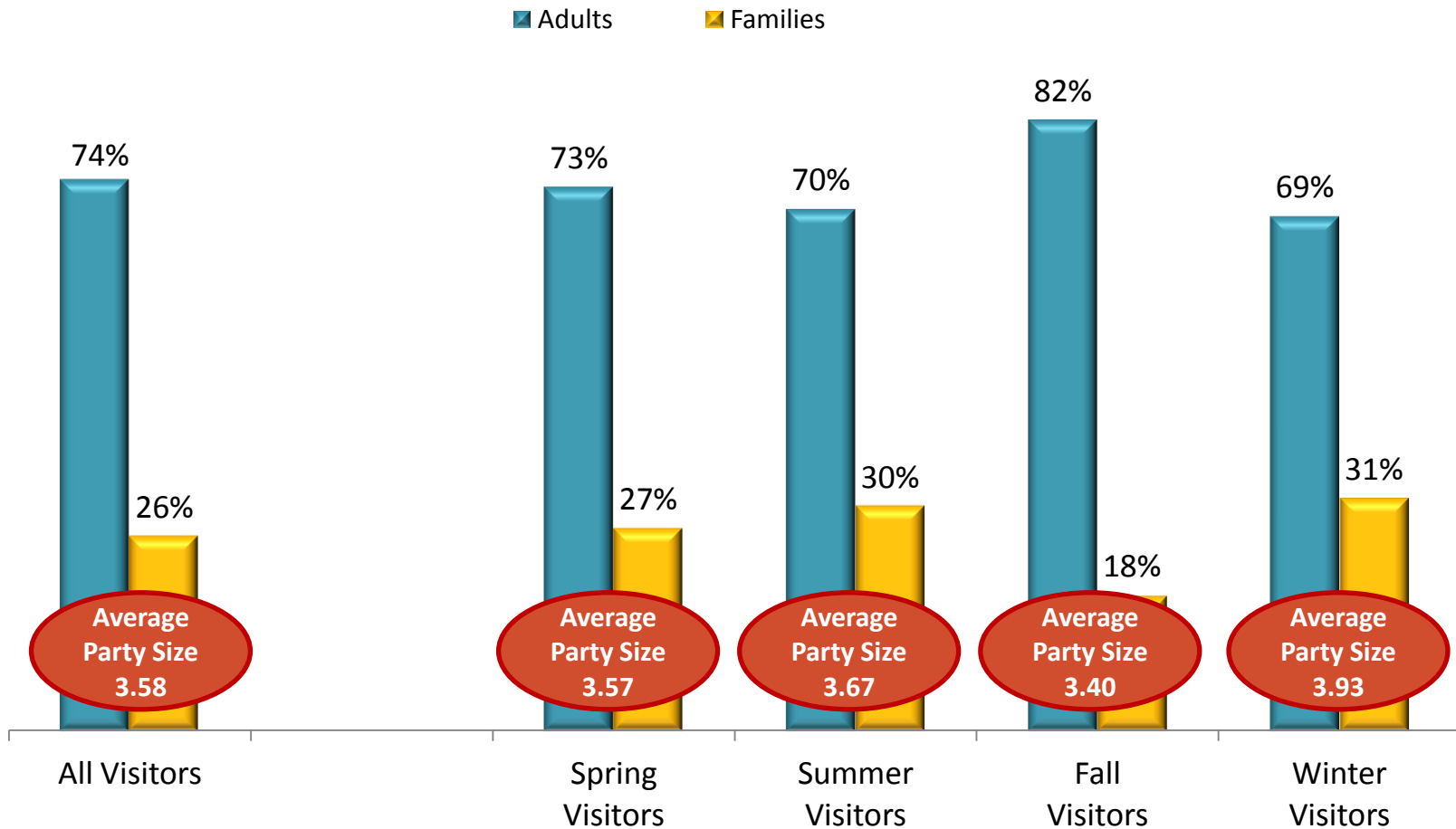
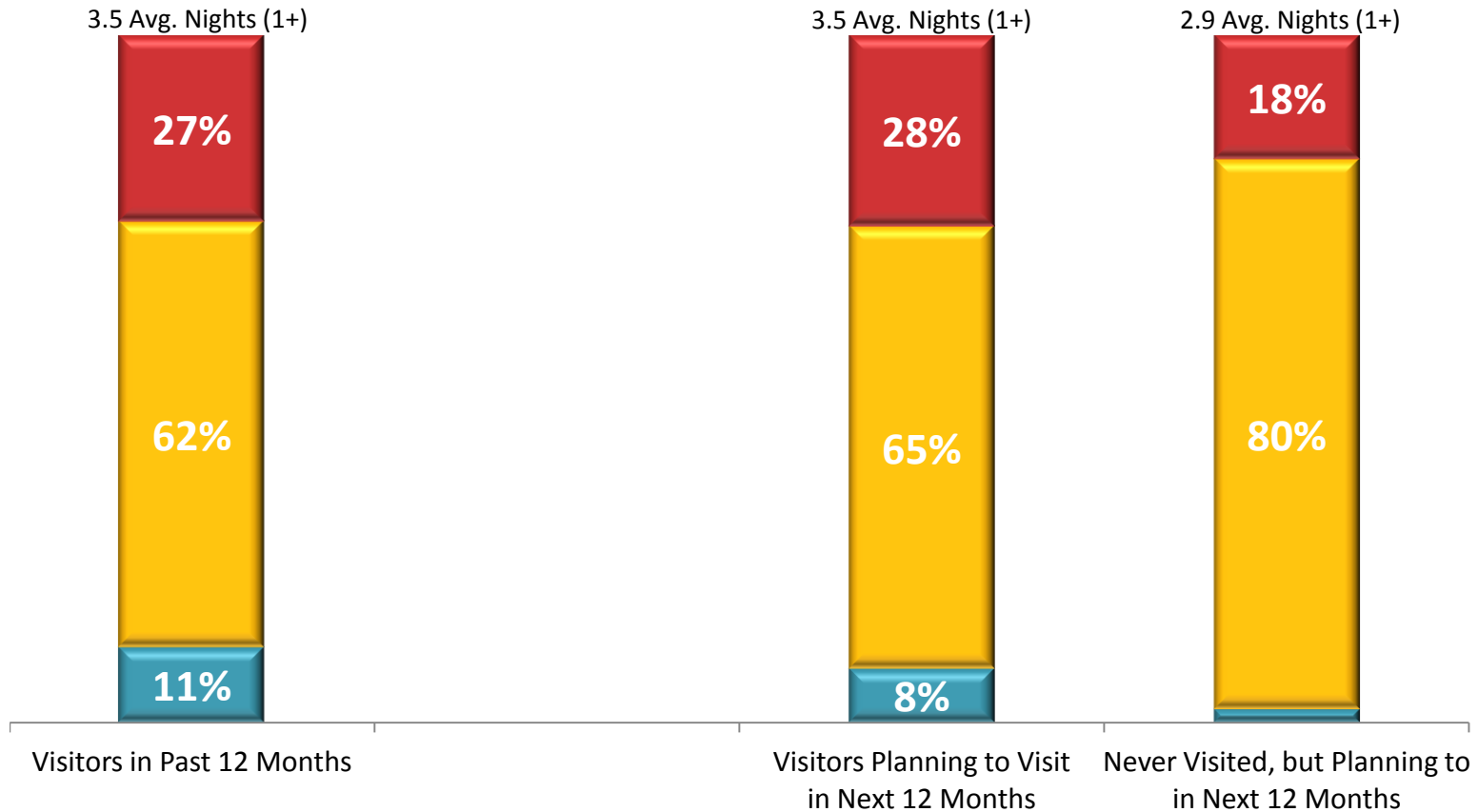


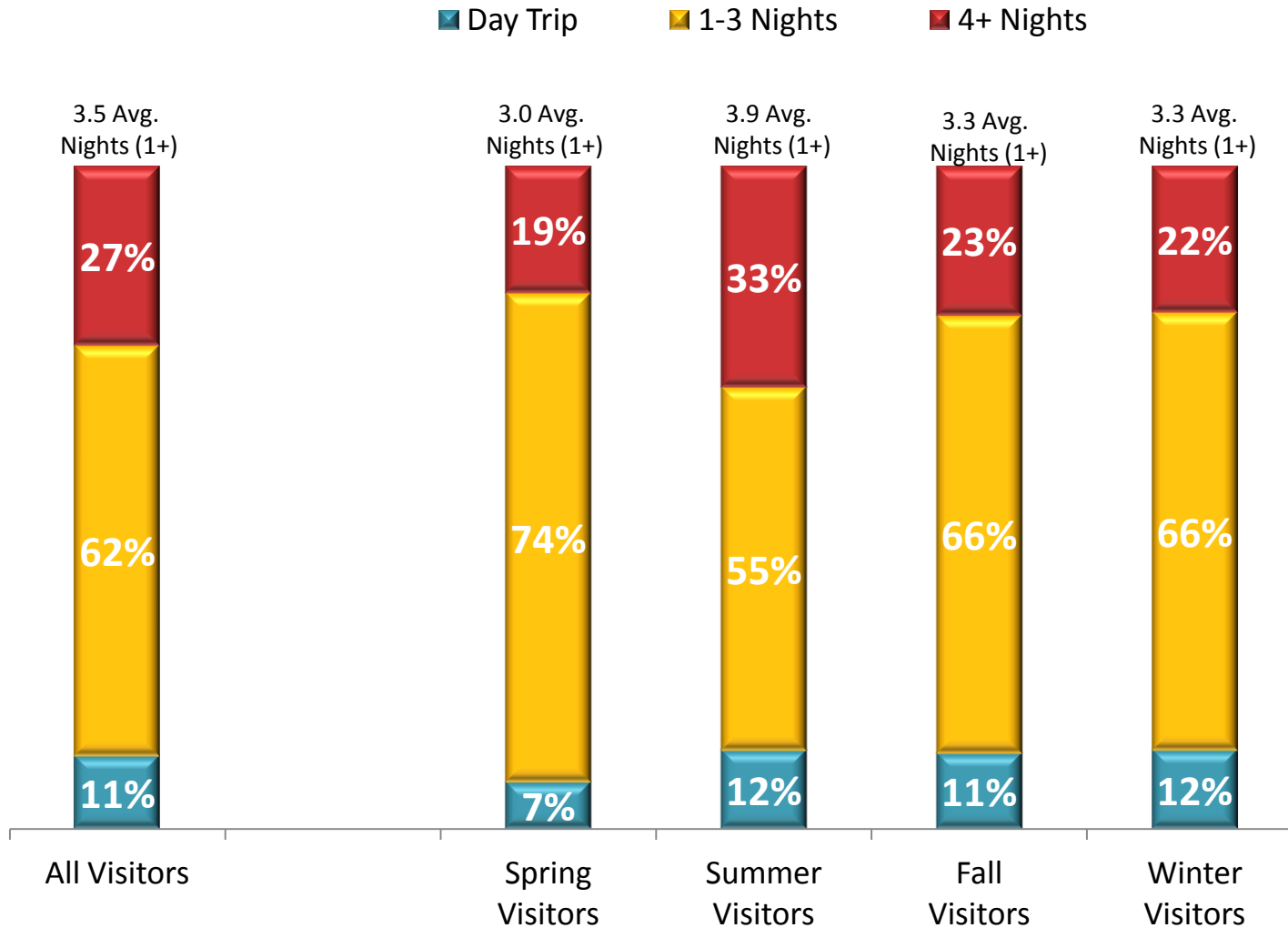
Chart 15B/Question 20 • Visitors in past 12 months n=1,074; Spring Visitors n=141; Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59

Length of Stay in Door County

■ Day Trip ■ 1-3 Nights ■ 4+ Nights

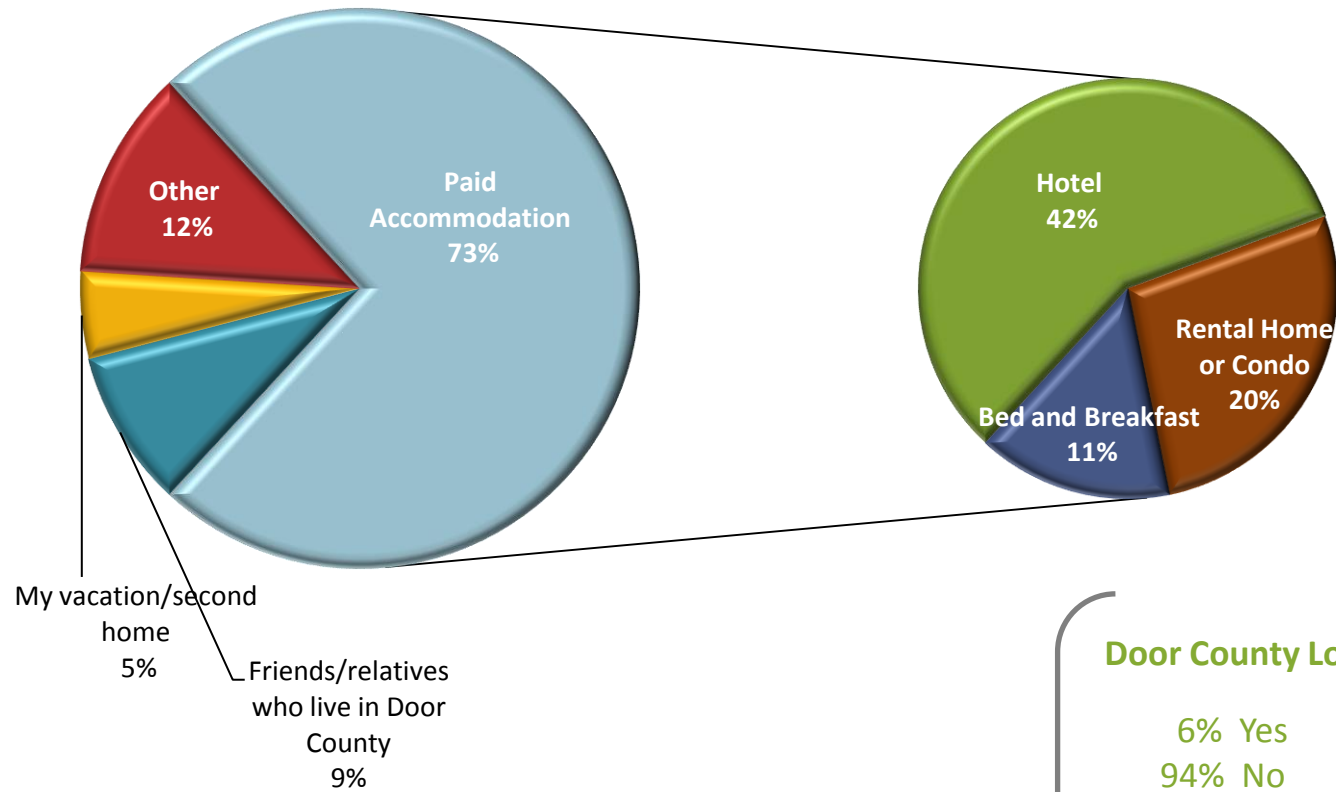


Length of Most Recent Stay in Door County



Accommodation Type During Most Recent Trip to Door County

DOOR COUNTY TRIP



Door County Lodging Package

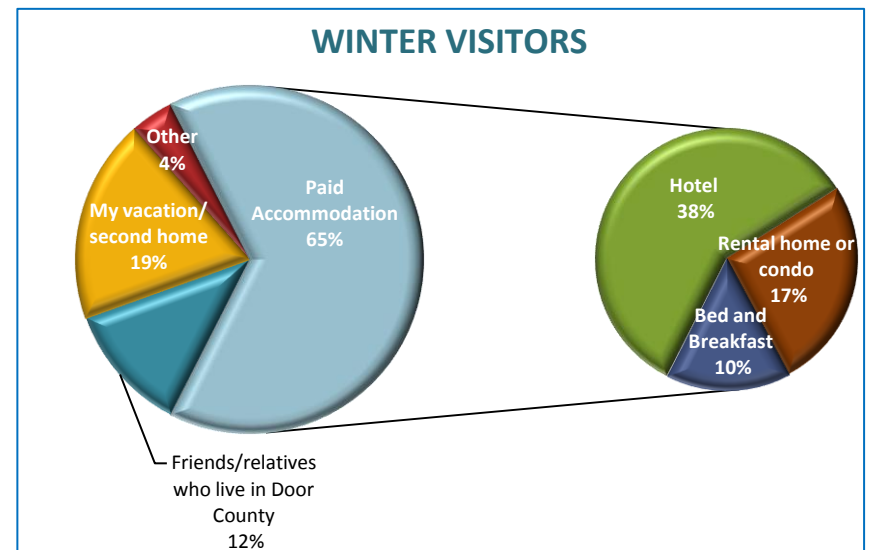
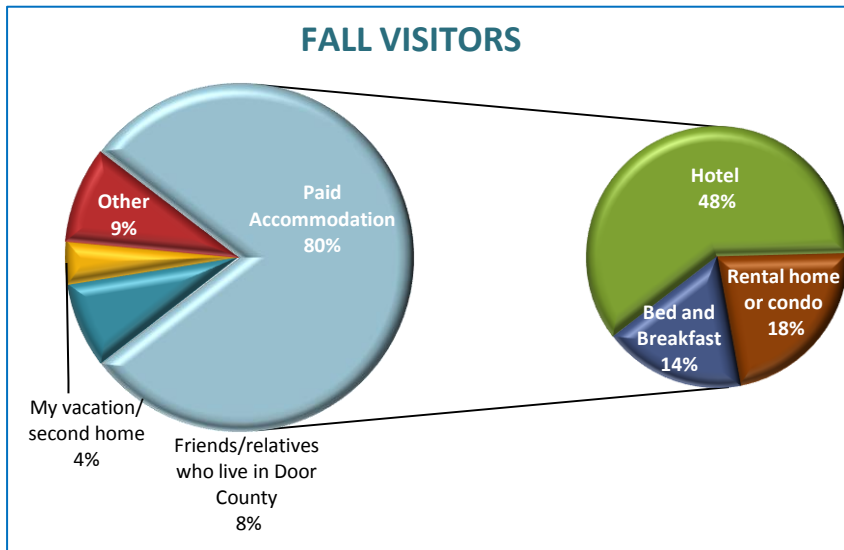
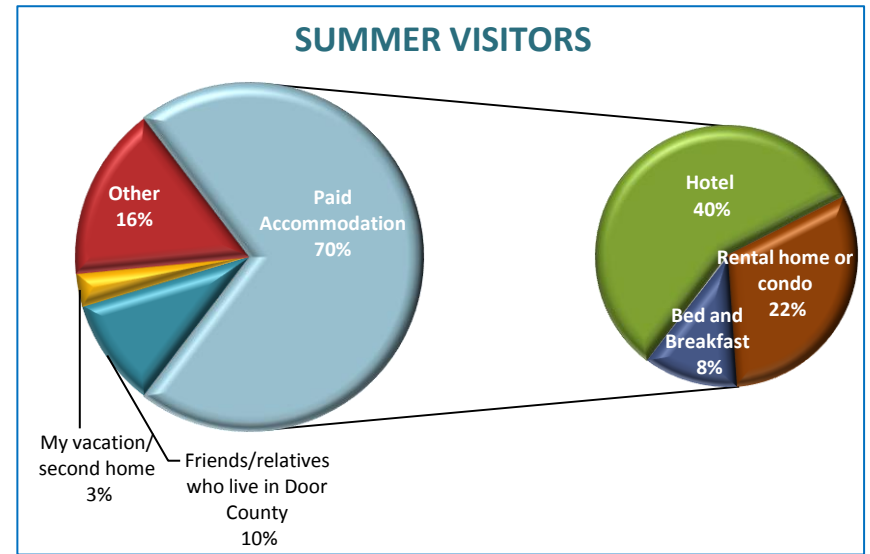
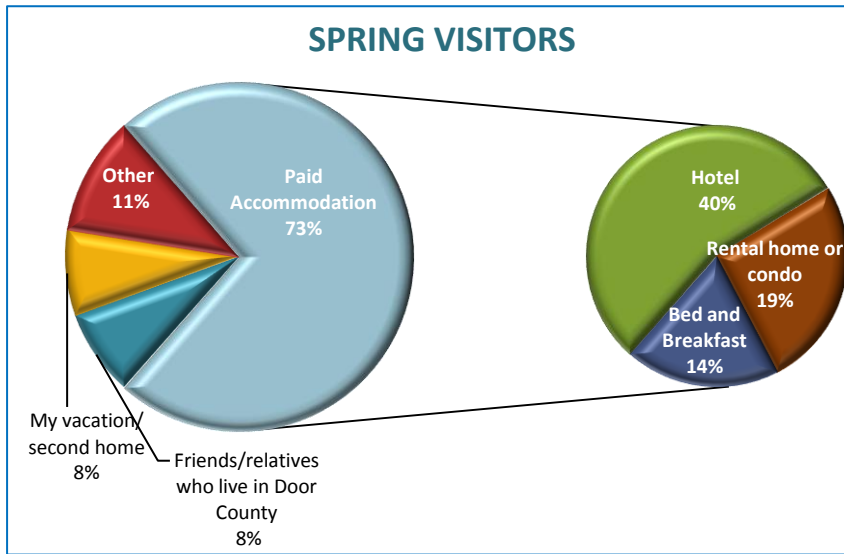
6% Yes

94% No

Question 22b • Overnight Visitors Paid Accommodations in past 12 months n=701

Accommodation Type During Most Recent Trip to Door County

DOOR COUNTY TRIP



Activity Participation in Door County

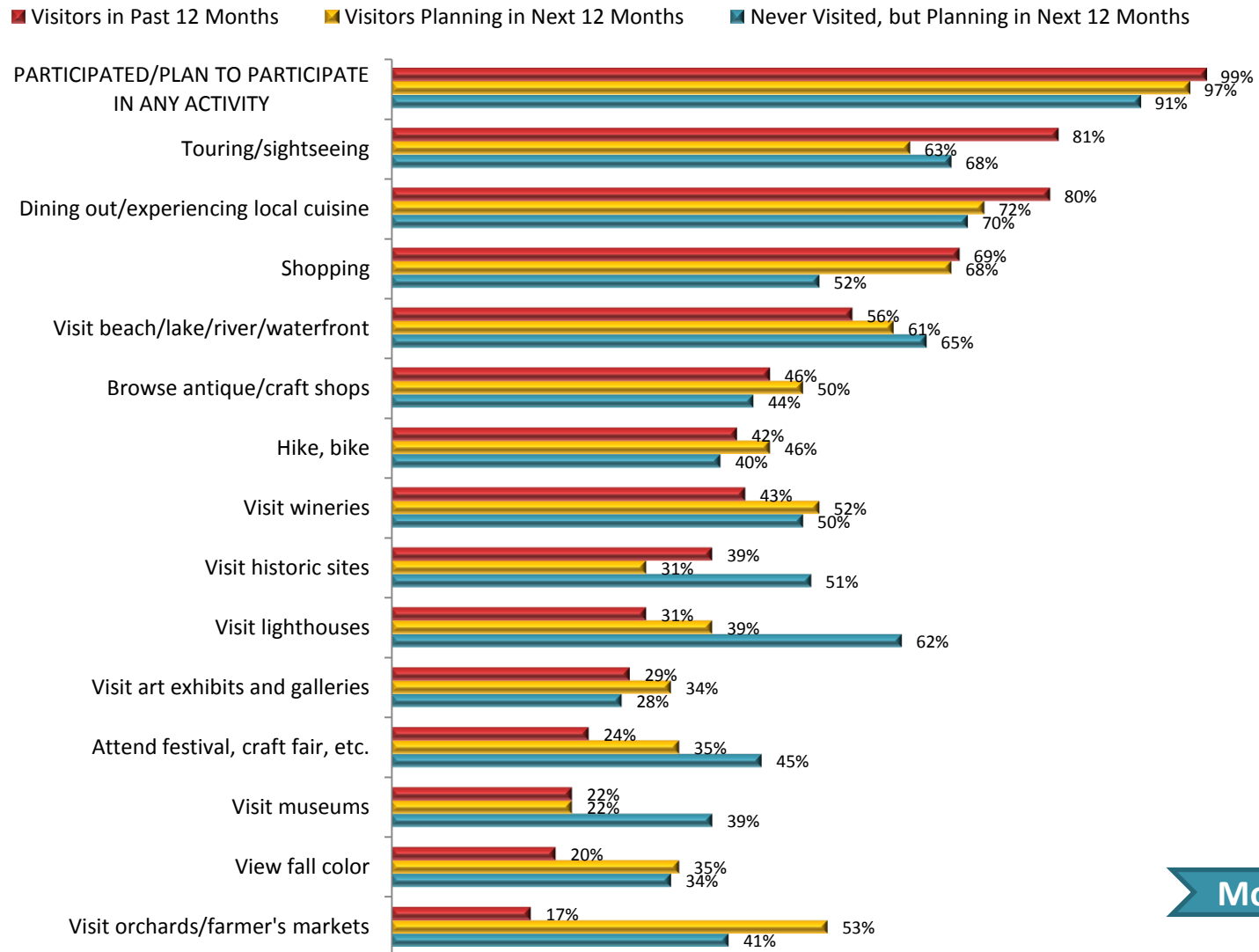


Chart 18A-1/Questions 23, 35 • Visitors in past 12 months n=1,074; Visitors planning n= 900; Never Visited, but planning n=533

Activity Participation in Door County

■ Visitors in Past 12 Months
 ■ Visitors Planning in Next 12 Months
 ■ Never Visited, but Planning in Next 12 Months

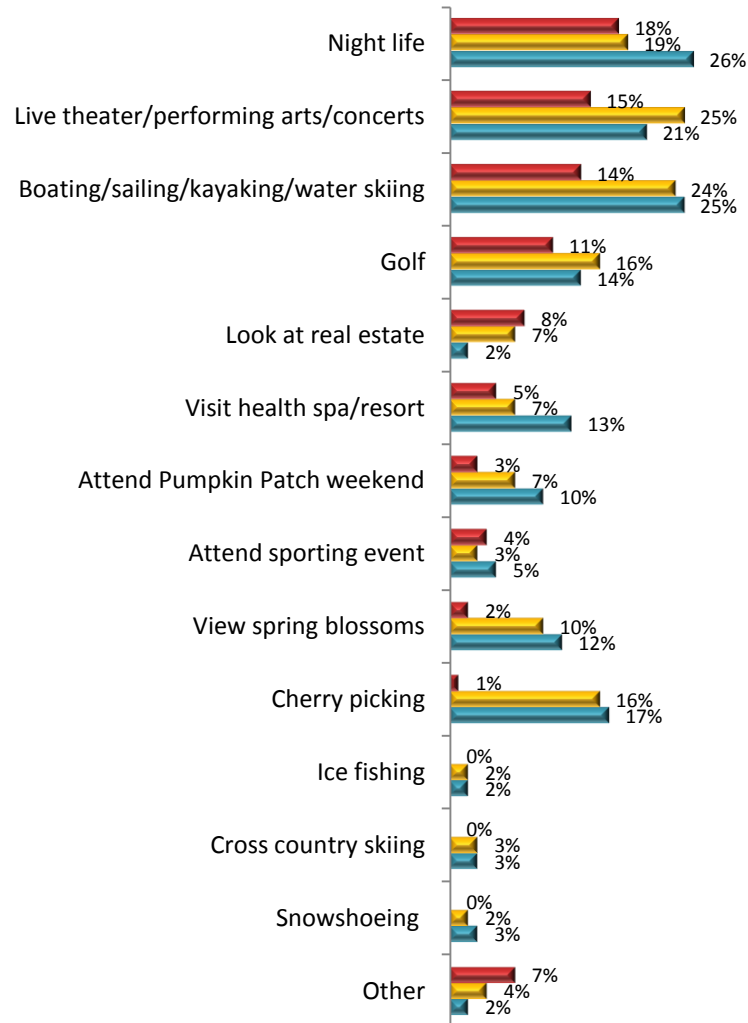


Chart 18A-2/Questions 23, 35 • Visitors in past 12 months n=1,074; Visitors planning n= 900; Never Visited, but planning n=533

Activity Participation on Most Recent Trip to Door County

DOOR COUNTY TRIP

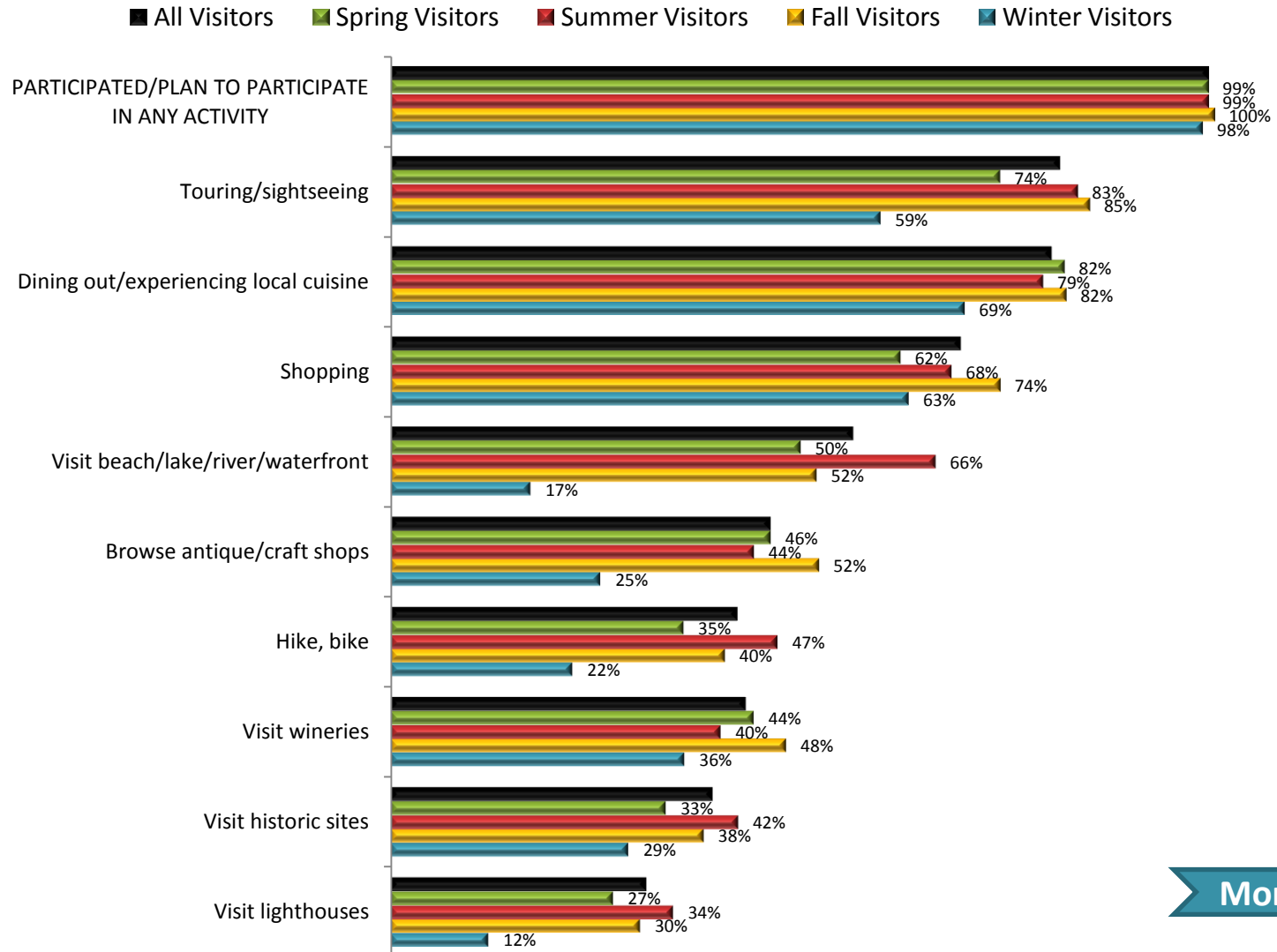
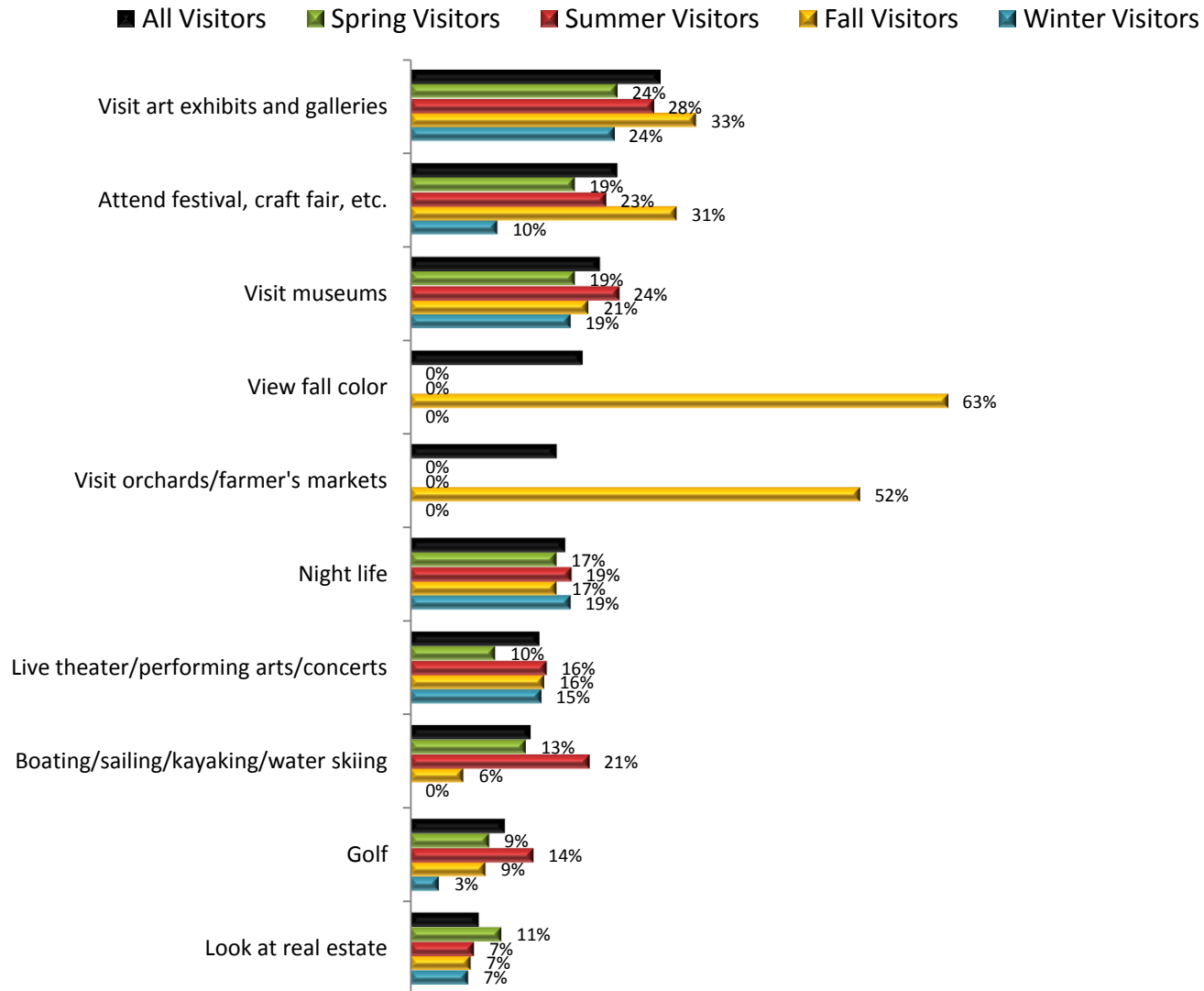


Chart 18B-1/Questions 23 • Visitors in past 12 months n=1,074; Spring Visitors n=141, Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59

Activity Participation on Most Recent Trip to Door County



Activity Participation on Most Recent Trip to Door County

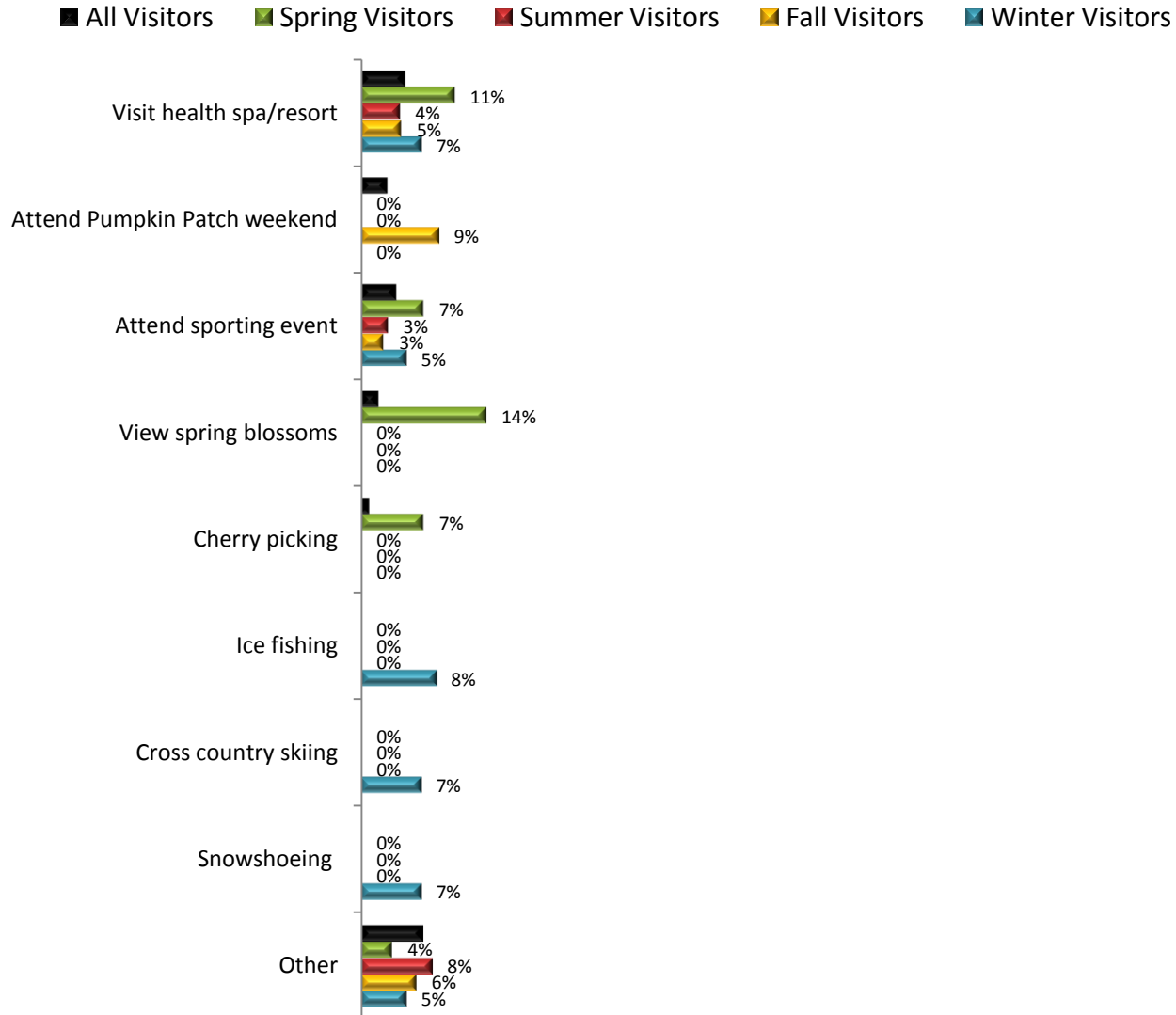
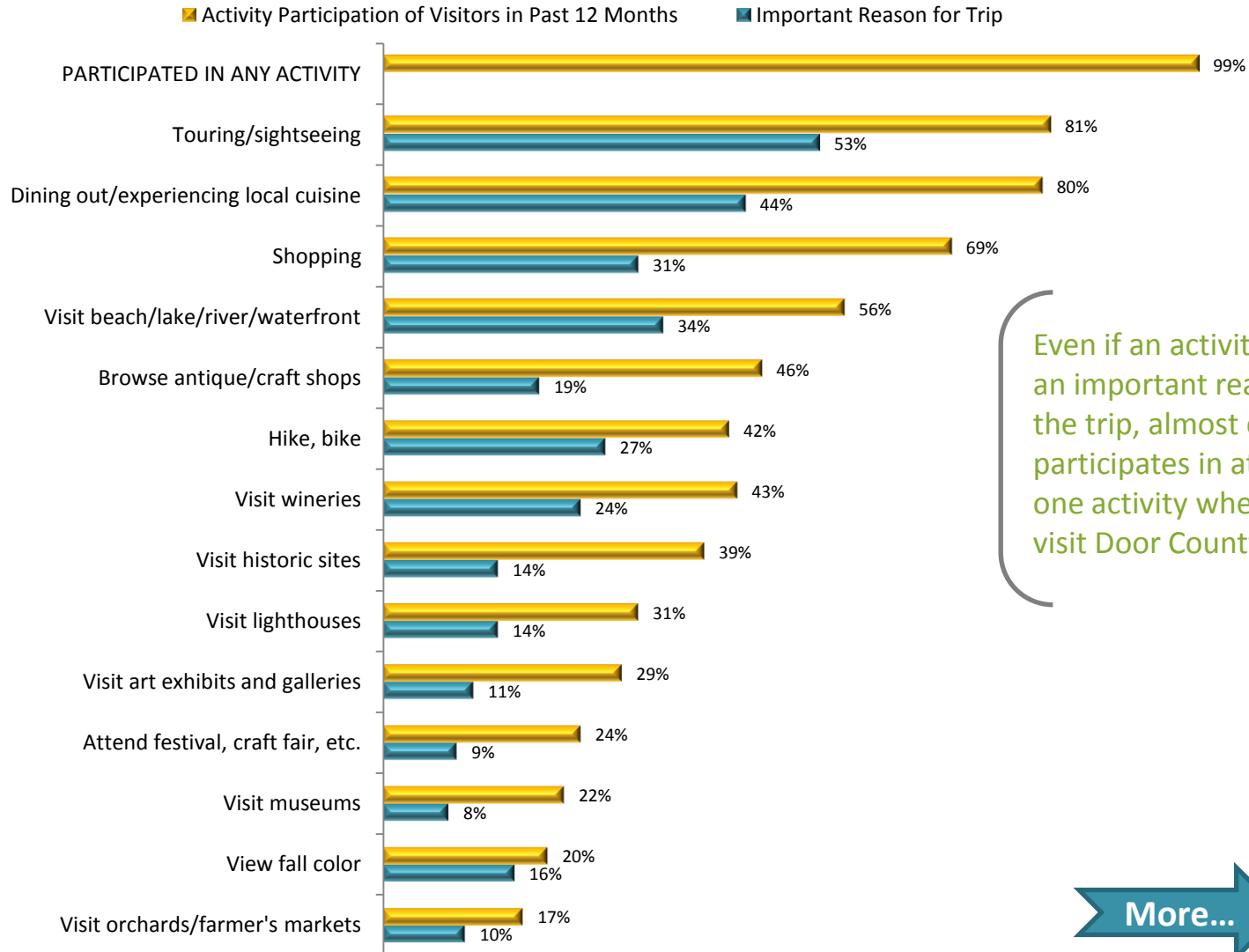


Chart 18B-3/Question 23 • Visitors in past 12 months n=1,074; Spring Visitors n=141; Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59

Activity Participation and Purpose - Most Recent Trip

DOOR COUNTY TRIP



Even if an activity is not an important reason for the trip, almost everyone participates in at least one activity when they visit Door County.



Activity Participation and Purpose – Most Recent Trip

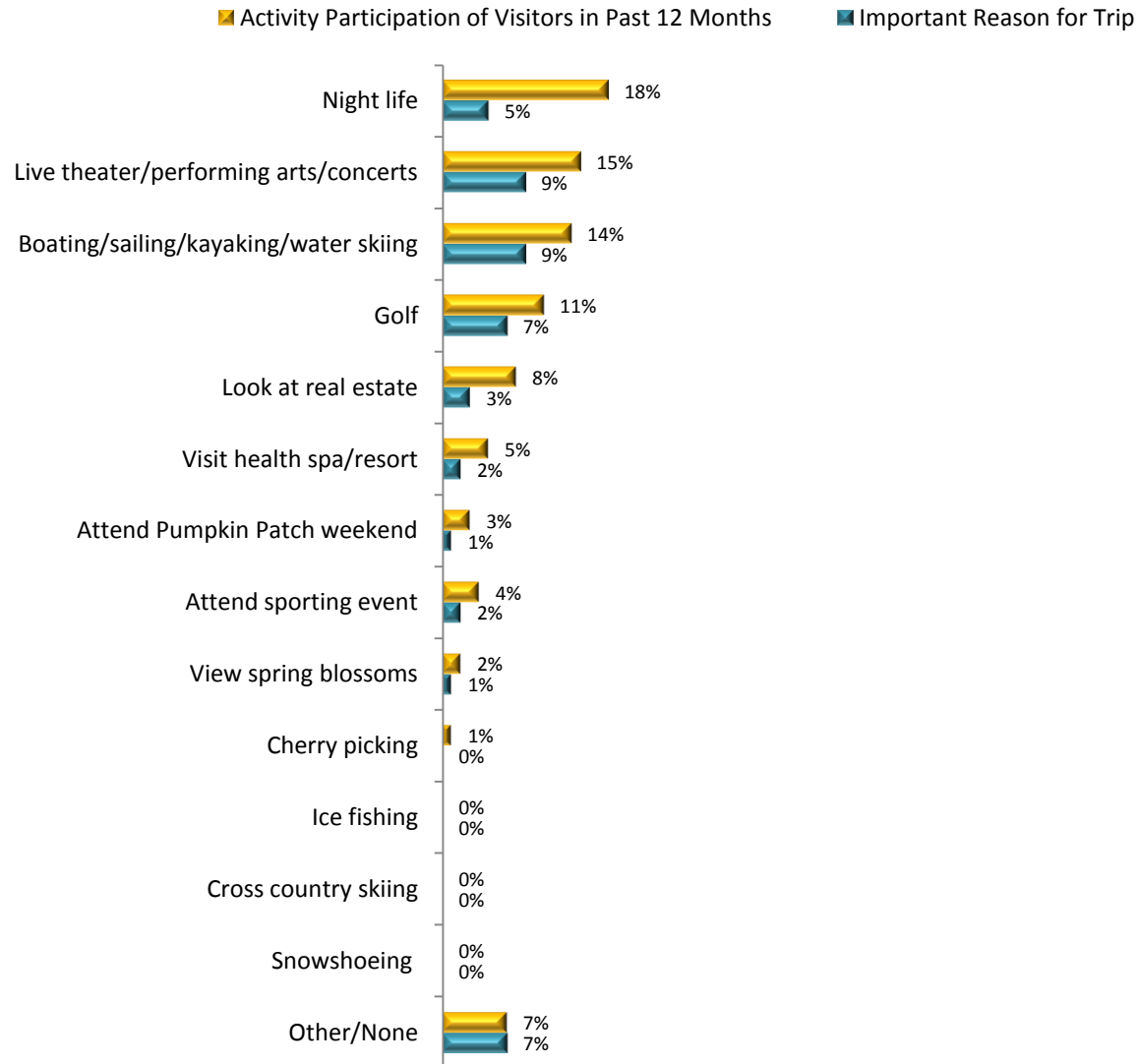
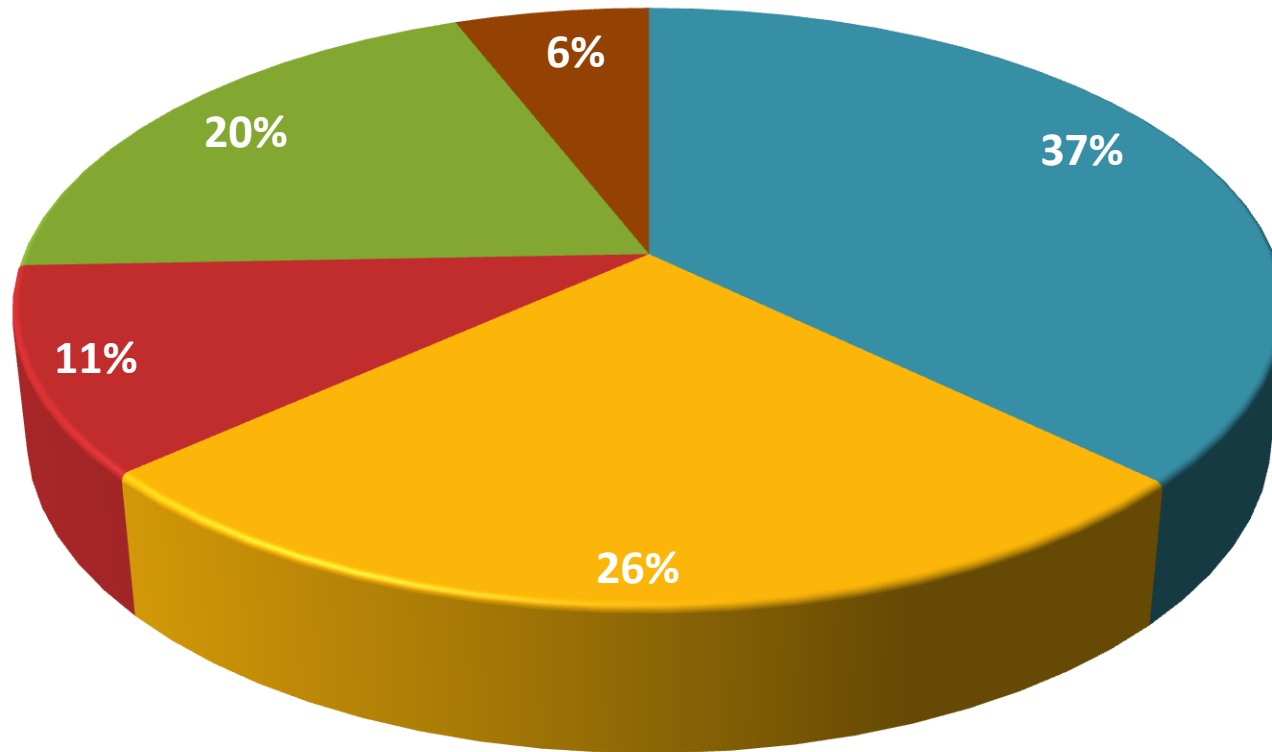


Chart 19-2/Questions 23, 24 • Visitors in past 12 months n=1,074

Average Travel Party Spending on Most Recent Trip to Door County

DOOR COUNTY TRIP

Average Party Per Trip Spending
\$933

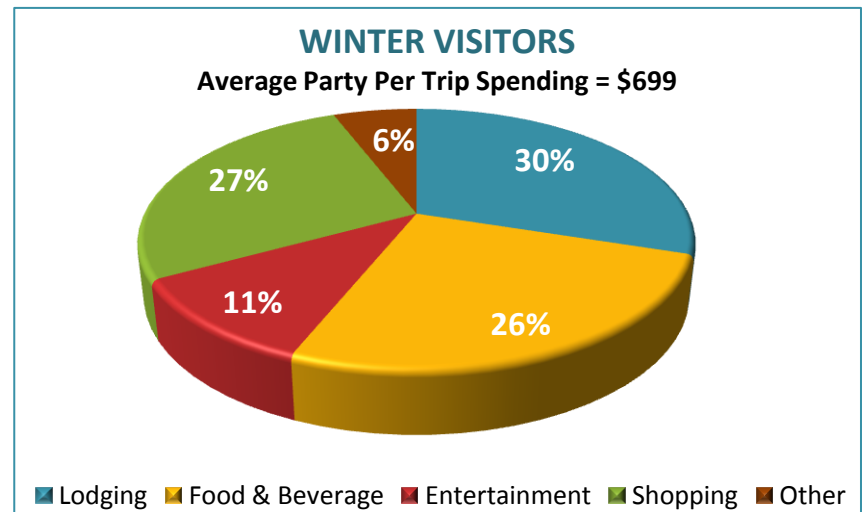
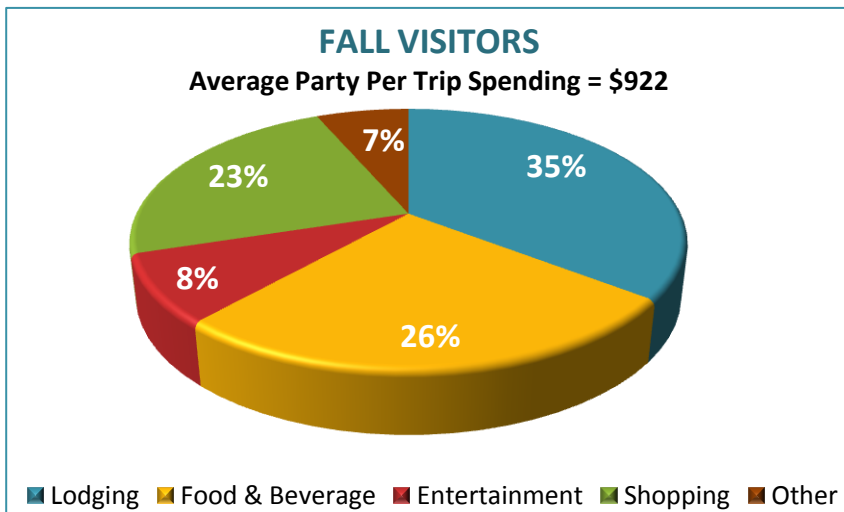
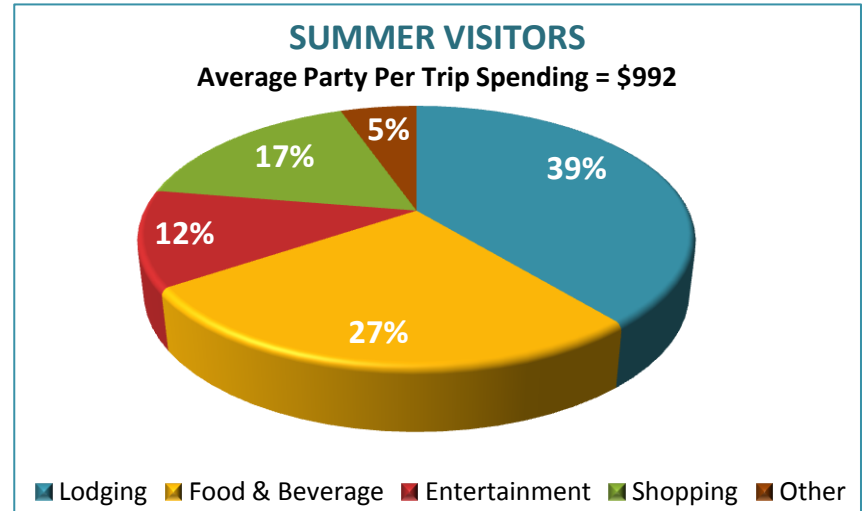
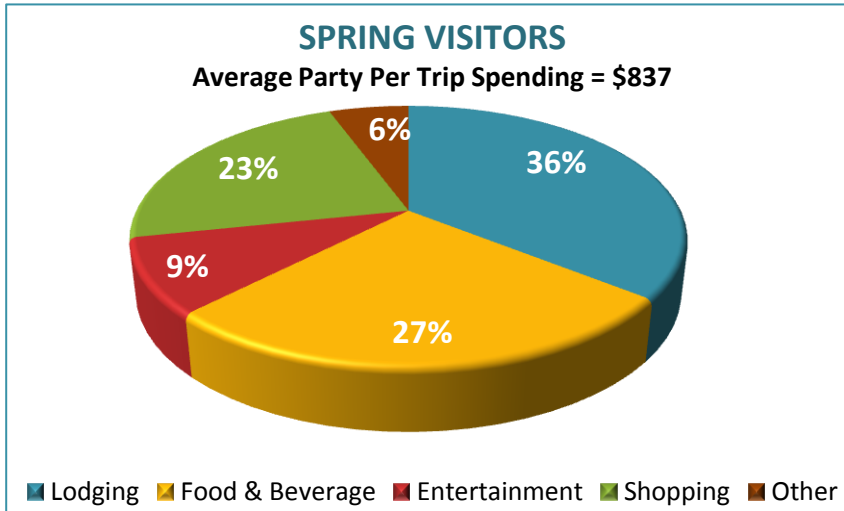


■ Lodging ■ Food & Beverage ■ Entertainment ■ Shopping ■ Other

Chart 20A/Question 25 • Visitors in past 12 months n=1,074

Average Travel Party Spending on Most Recent Trip to Door County

DOOR COUNTY TRIP



Frequency of Trips Taken to Door County in Past 12 Months

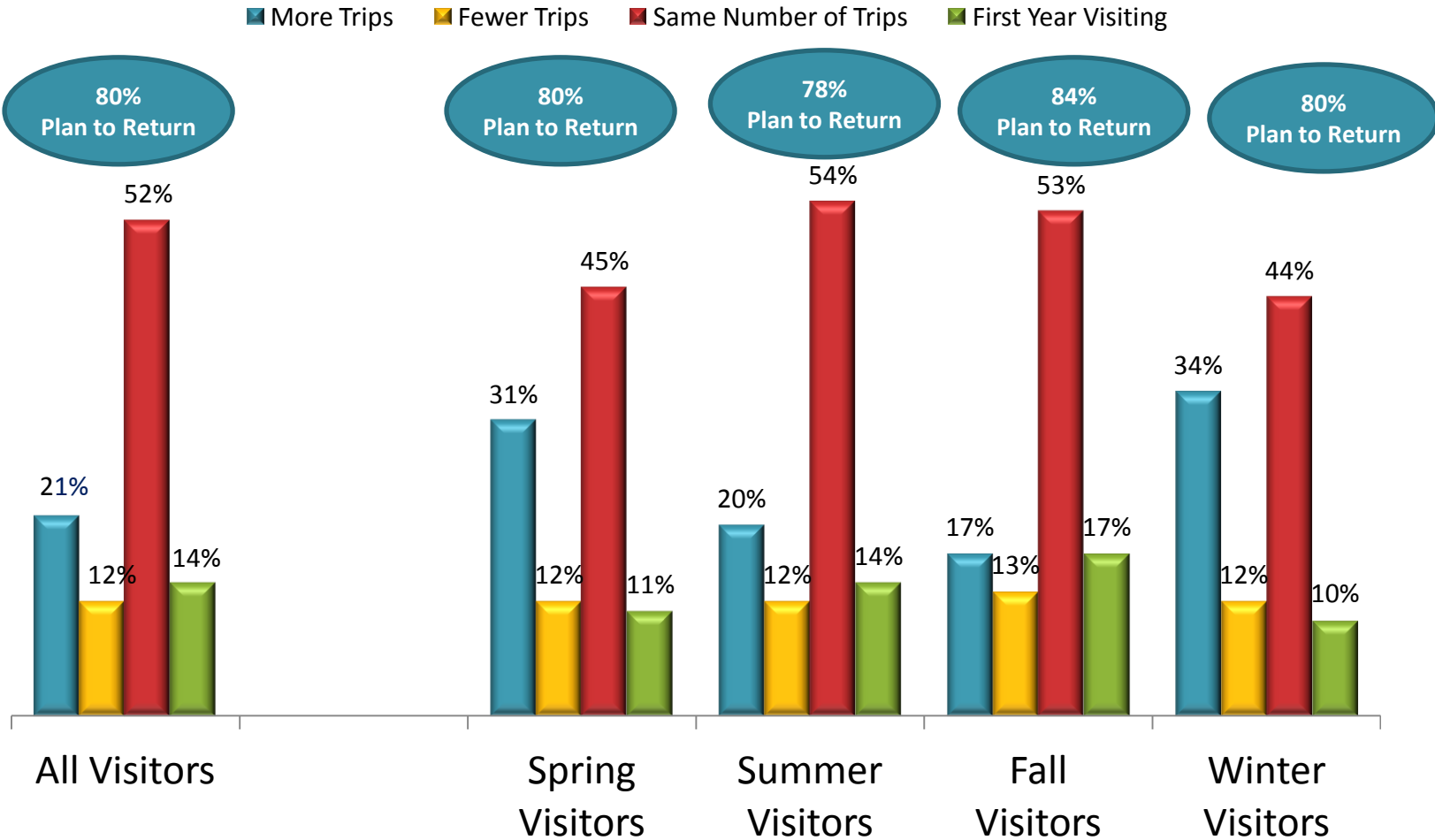


Chart 21/Questions 29, 30 • Visitors in past 12 months n=1,074; Spring Visitors n=141; Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59
Plan to Return Sometime in Future = Top 2 Box

Impressions of Door County

Excellent Ratings (Top 2 Box on 7 point scale)

DOOR COUNTY EVALUATIONS

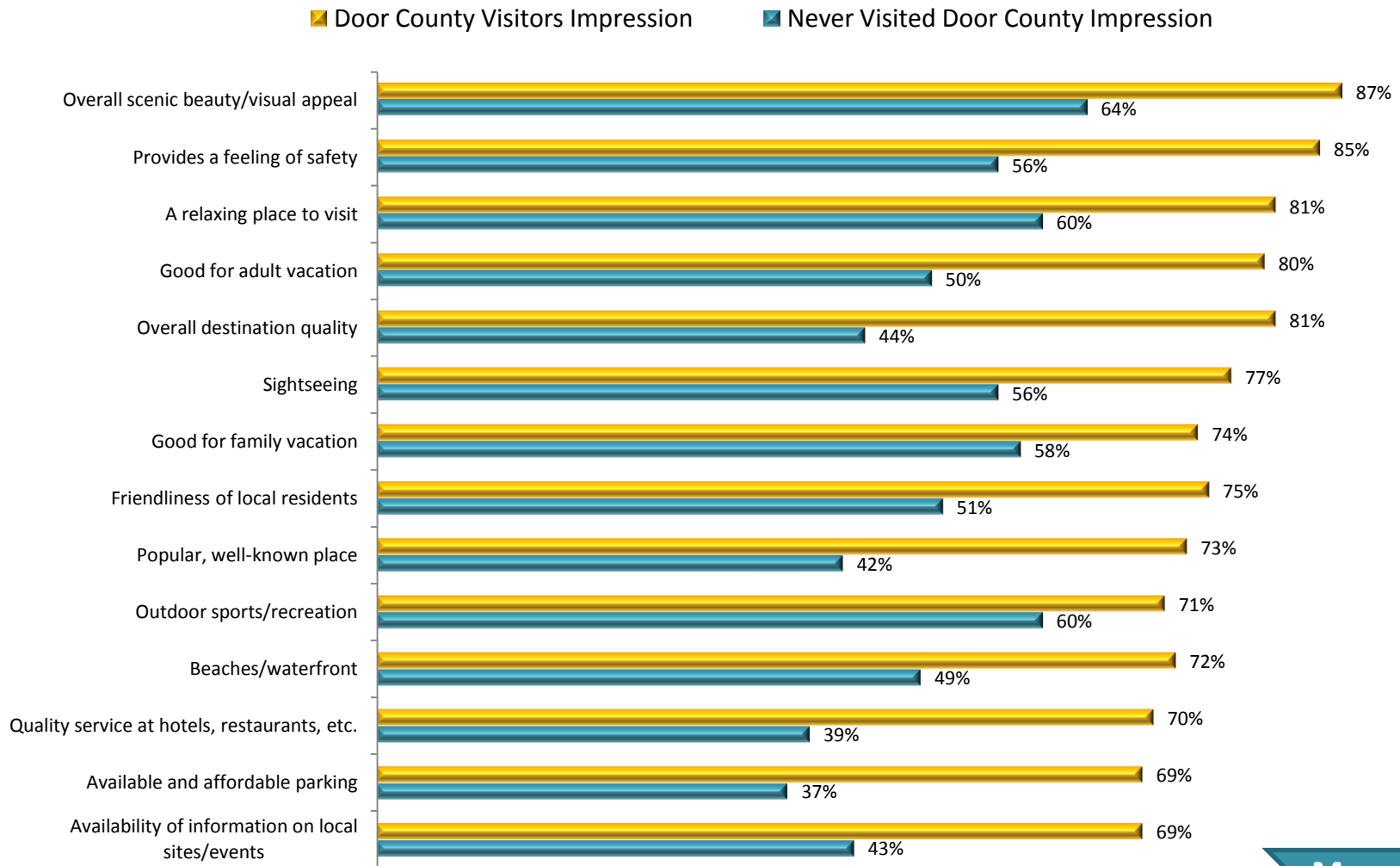


Chart 22A-1/Question 28 • Visitors in past 12 months n=1,074; Never Visited n=1,608

Impressions of Door County

Excellent Ratings (Top 2 Box on 7 point scale)

DOOR COUNTY EVALUATIONS

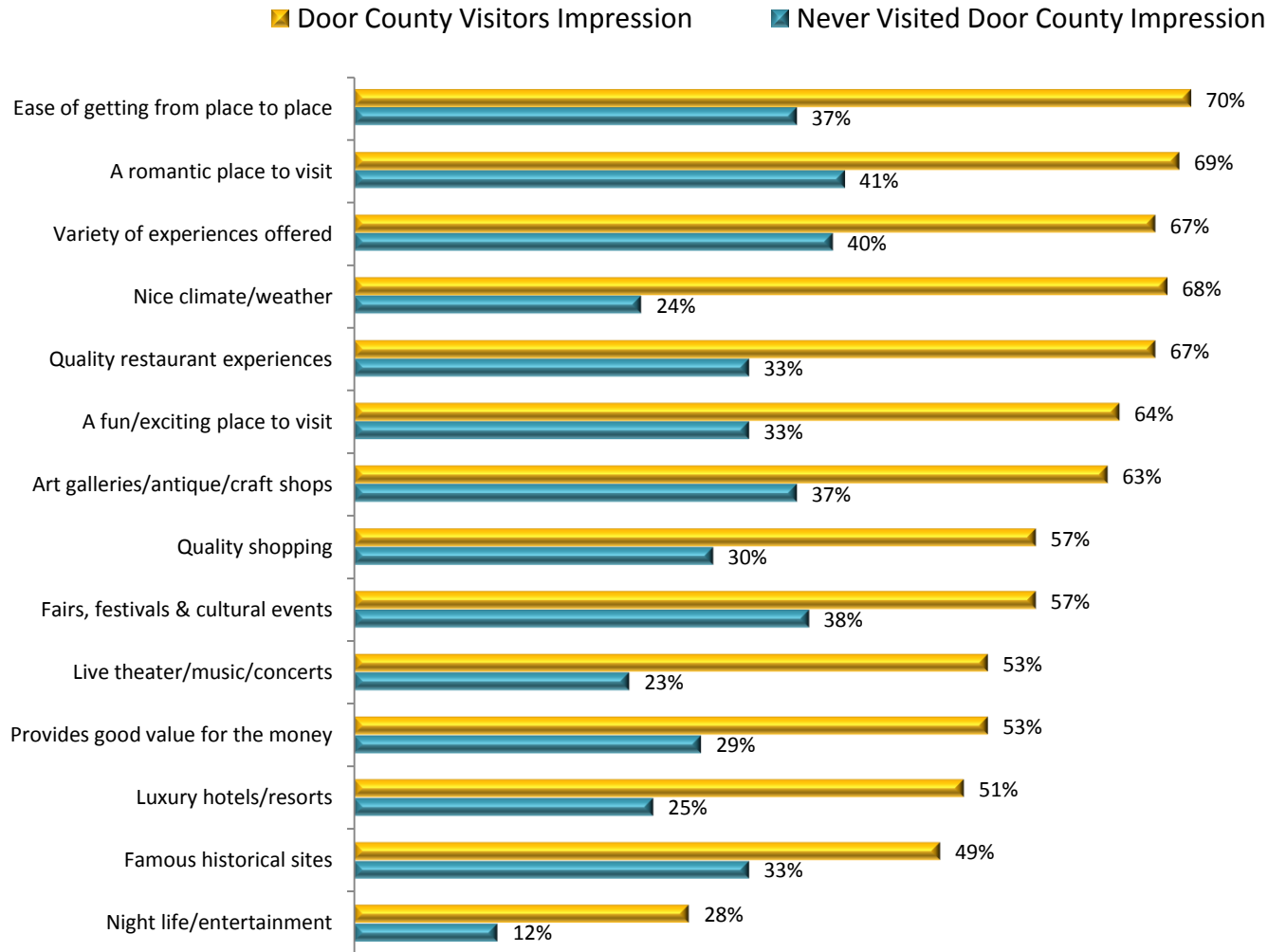


Chart 22A-2/Question 28 • Visitors in past 12 months n=1,074; Never Visited n=1,608

Visitors' Impressions of Door County

Excellent Ratings (Top 2 Box on 7 point scale)

DOOR COUNTY EVALUATIONS

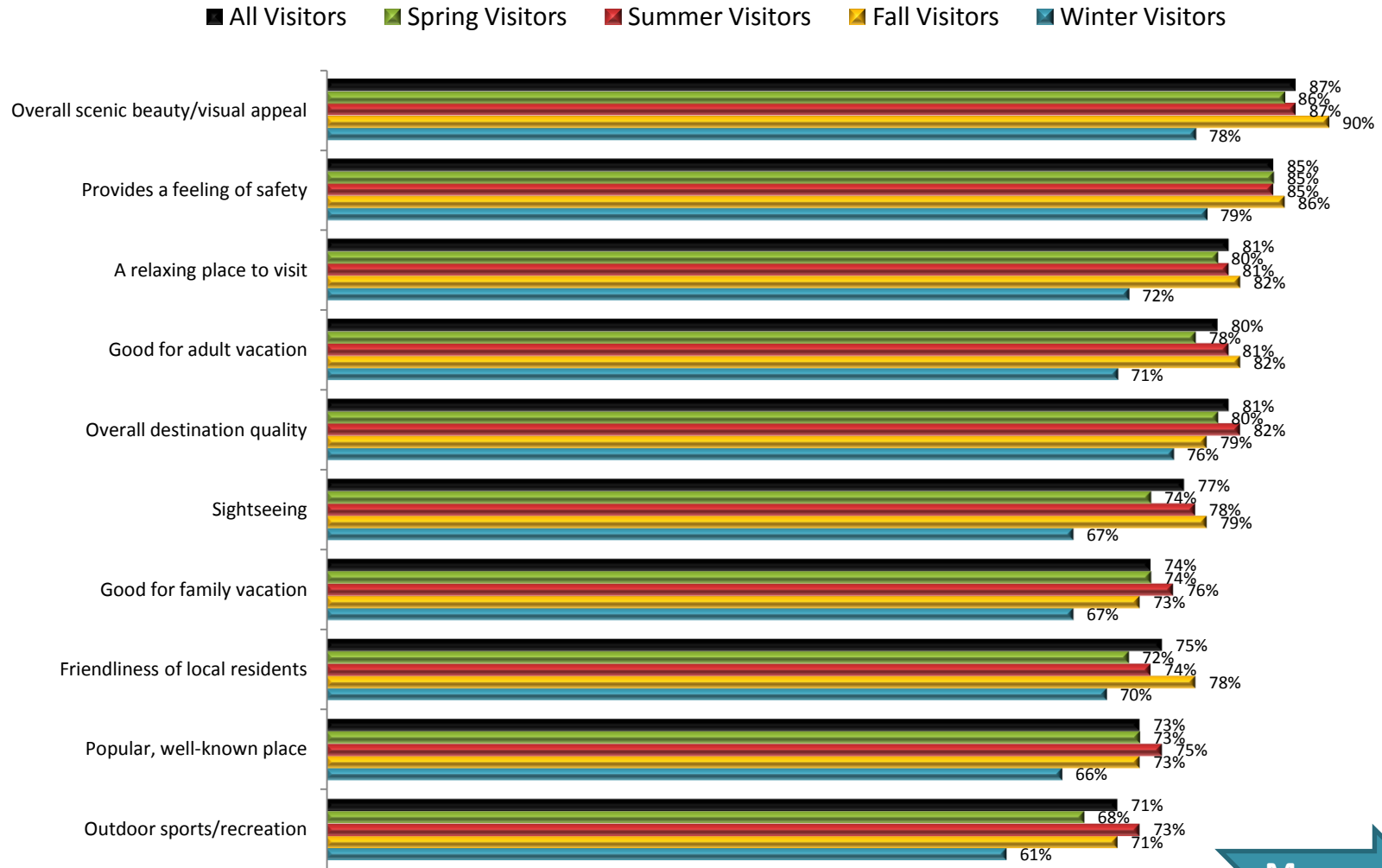
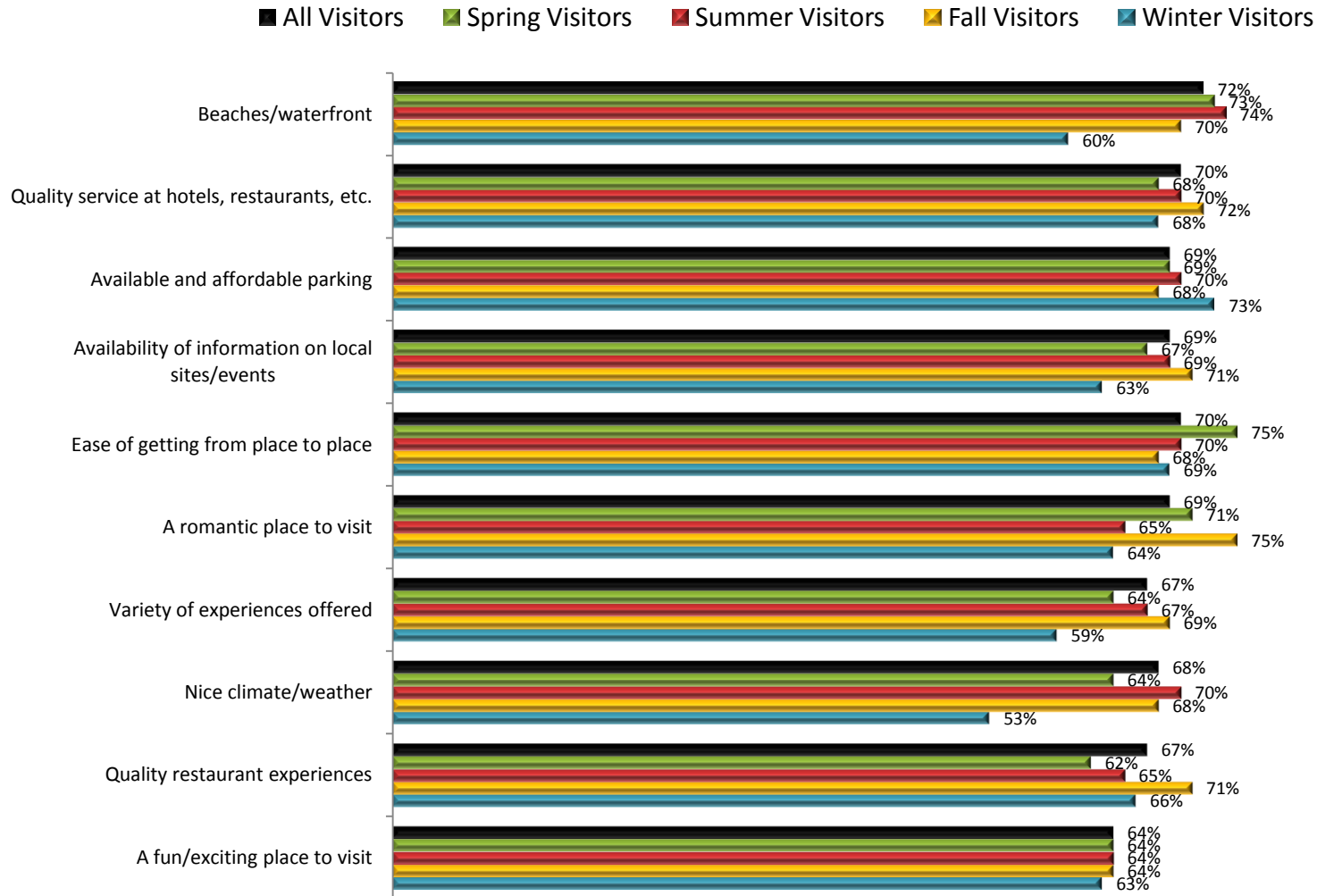


Chart 22B-1/Question 28 • Visitors in past 12 months n=1,074; Spring Visitors n=141; Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59

Visitors' Impressions of Door County

Excellent Ratings (Top 2 Box on 7 point scale)

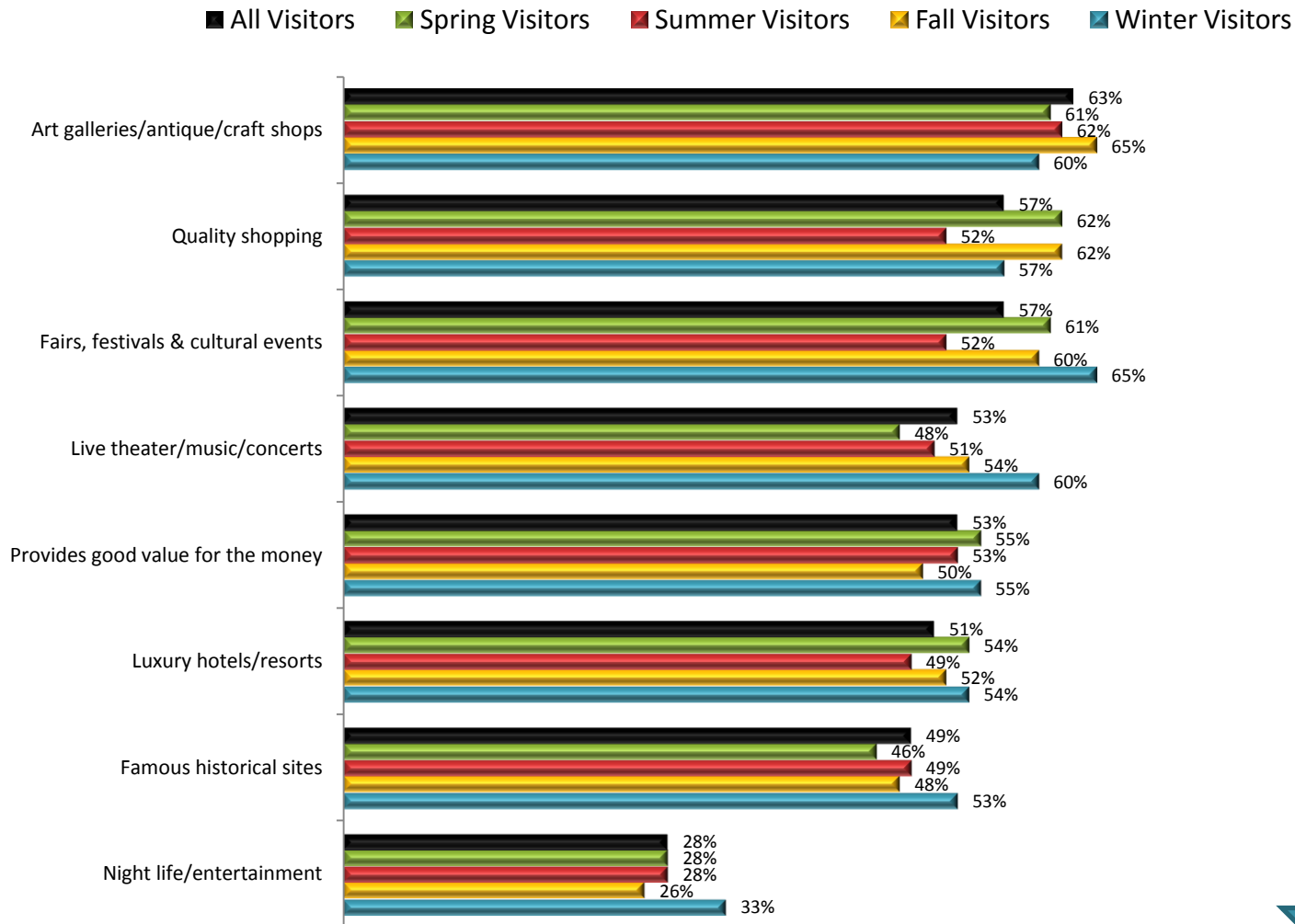
DOOR COUNTY EVALUATIONS



Visitors' Impressions of Door County

Excellent Ratings (Top 2 Box on 7 point scale)

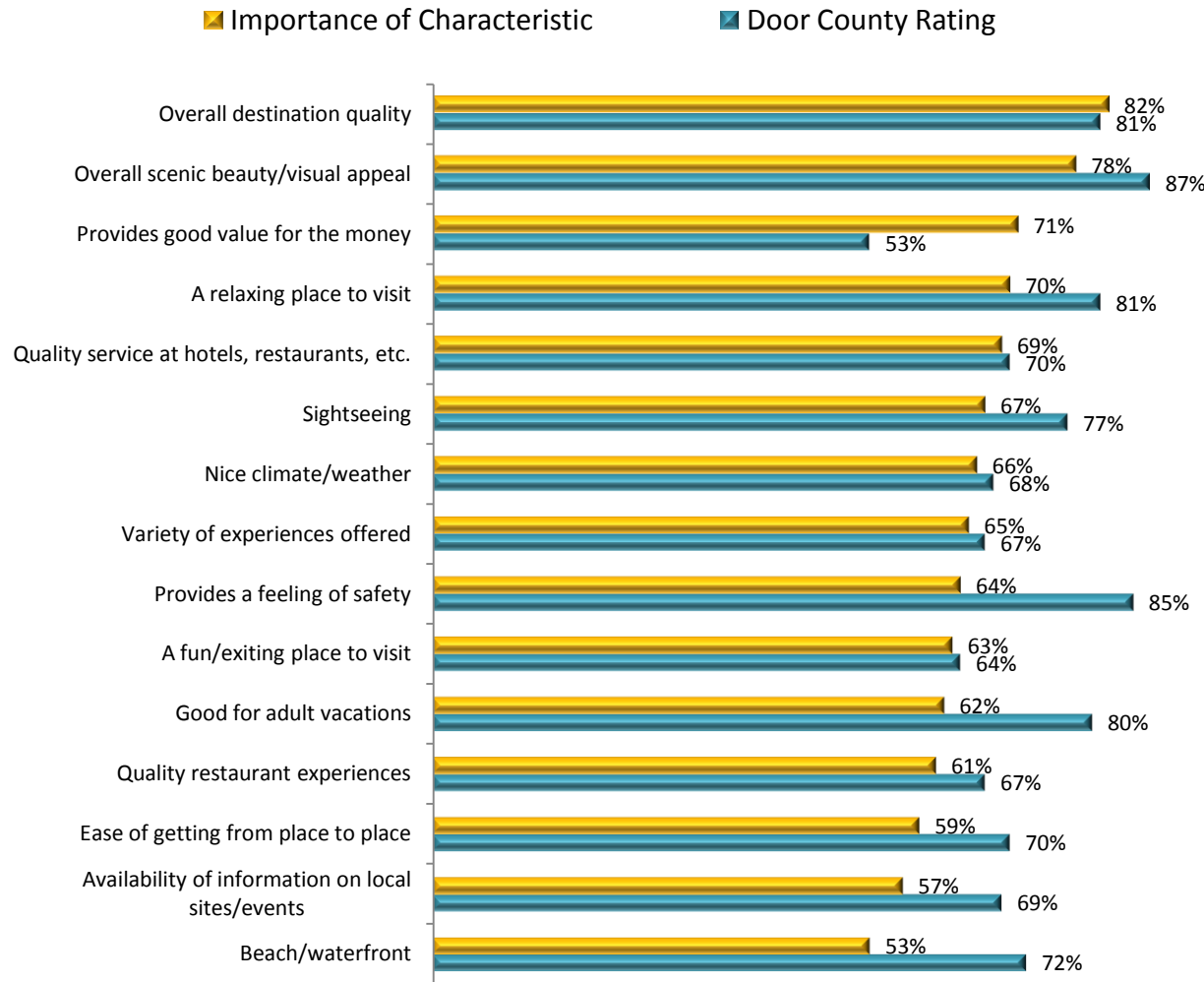
DOOR COUNTY EVALUATIONS



Importance of Characteristic vs. Impressions of Door County

Door County Visitors - Excellent Ratings (Top 2 Box on 7 point scale)

DOOR COUNTY EVALUATIONS



Any characteristic where the blue line exceeds the gold line indicates a characteristic Door County delivers very well.

If the gold line exceeds the blue line however, Door County is falling short of the visitor's usual expectations.

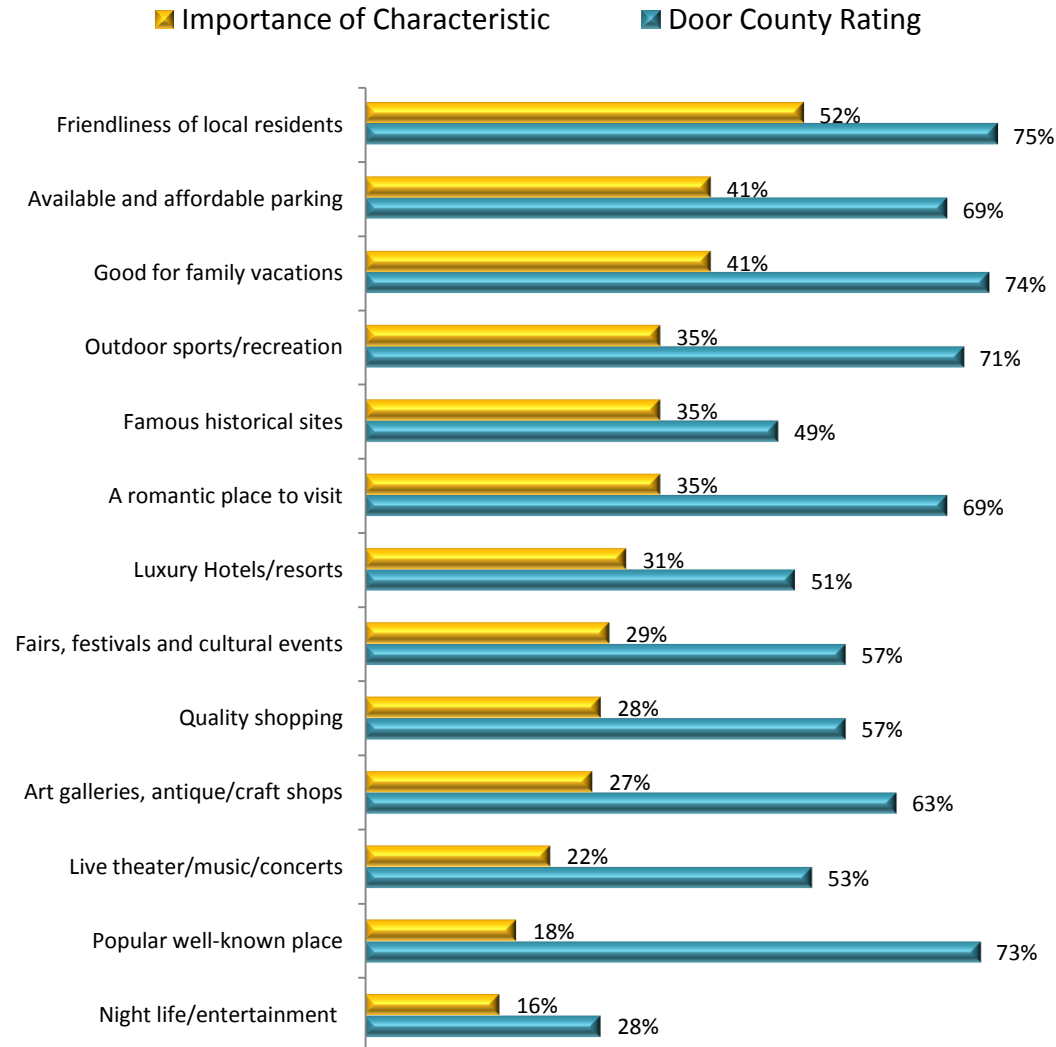
In most cases Door County is delivering what its visitors are looking for.



Importance of Characteristic vs. Impressions of Door County

Door County Visitors - Excellent Ratings (Top 2 Box on 7 point scale)

DOOR COUNTY EVALUATIONS



Importance of Characteristic vs. Impressions of Door County

Door County Visitors - Excellent Ratings (Top 2 Box on 7 point scale)

DOOR COUNTY EVALUATIONS

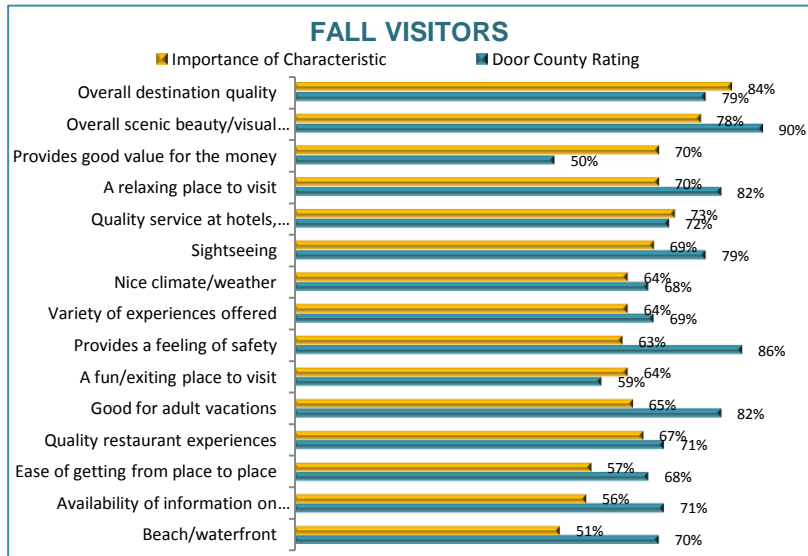
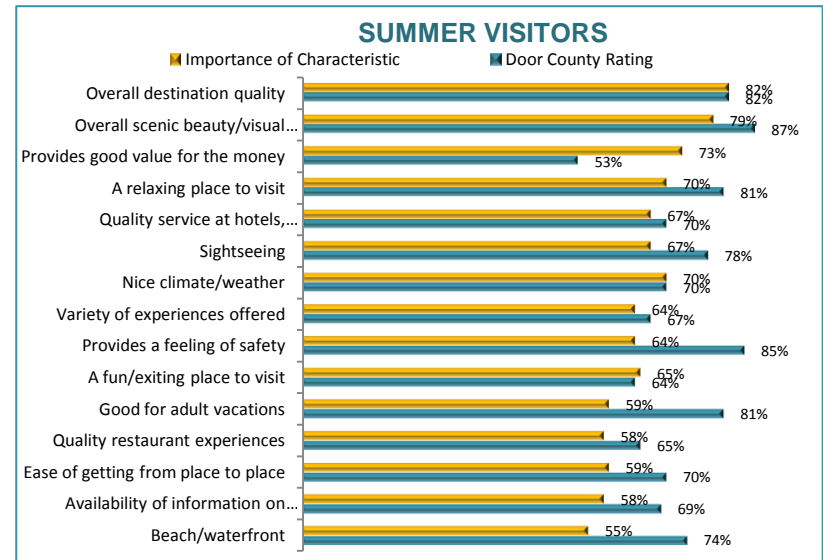
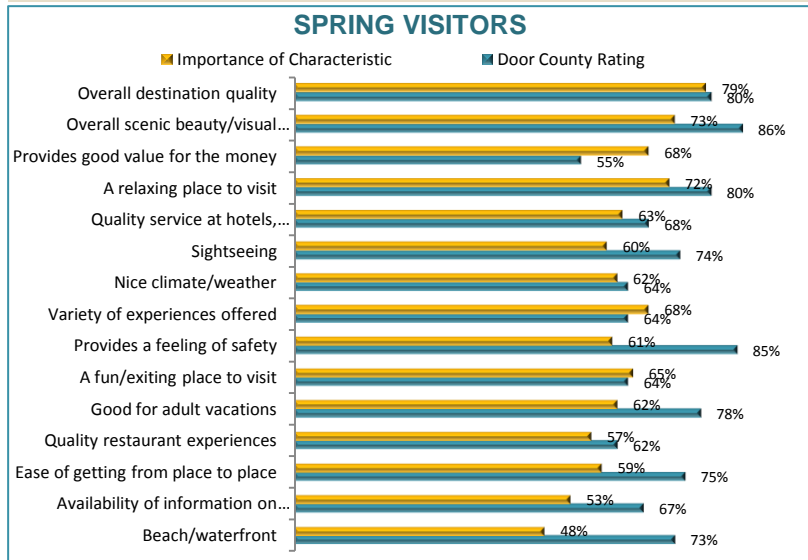


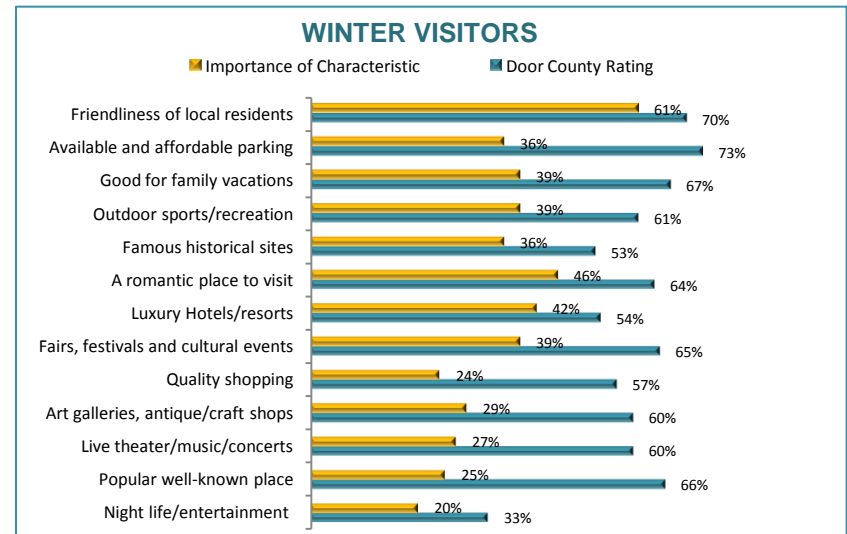
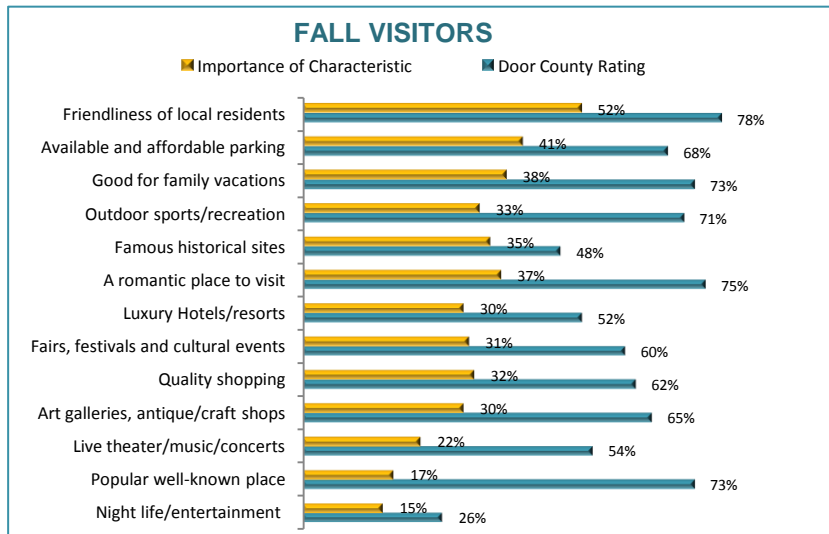
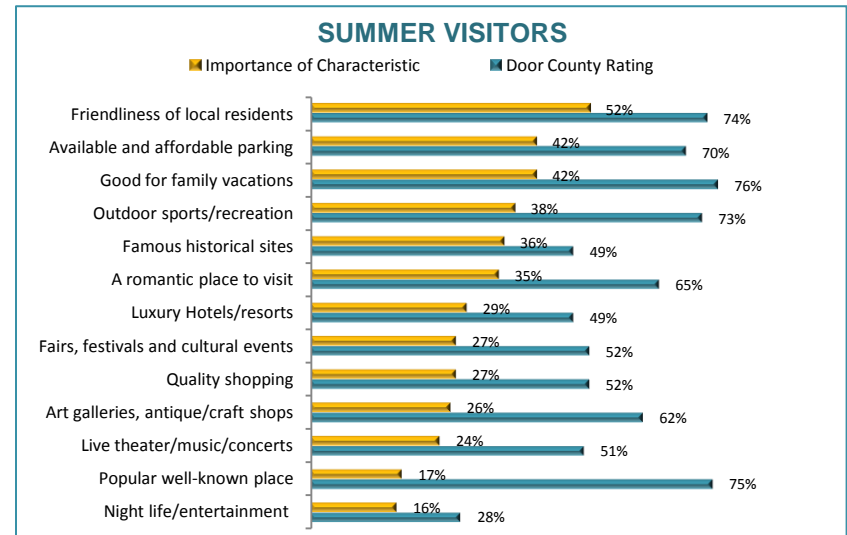
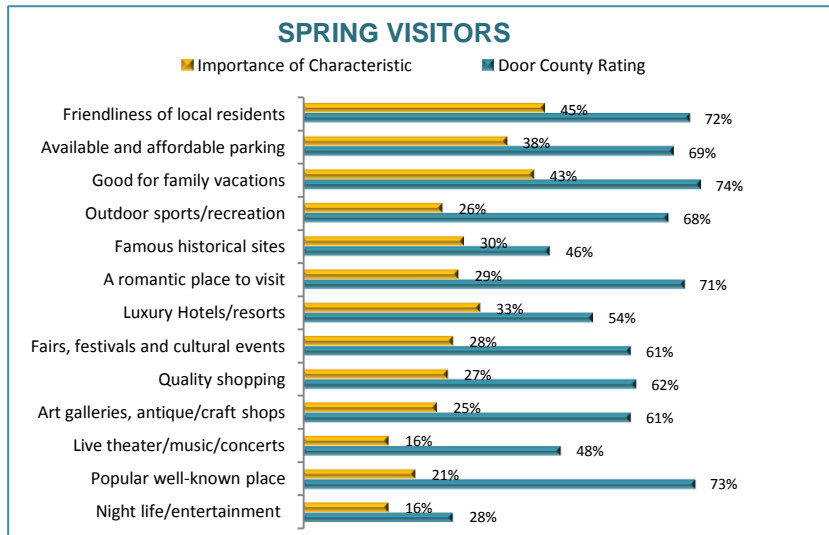
Chart 23B-1/Question 8, 28 • Spring Visitors n=141; Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59



Importance of Characteristic vs. Impressions of Door County

Door County Visitors - Excellent Ratings (Top 2 Box on 7 point scale)

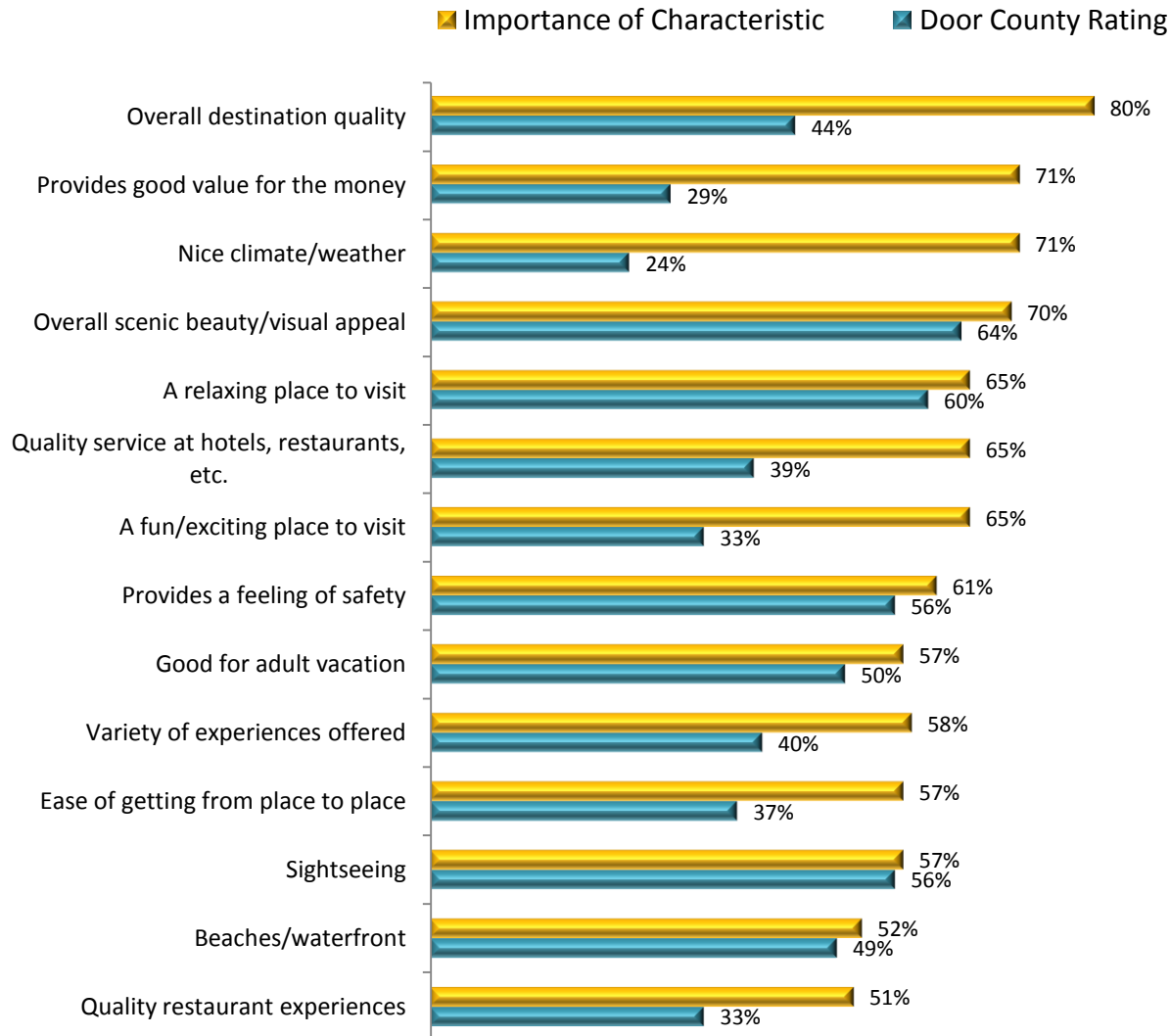
DOOR COUNTY EVALUATIONS



Importance of Characteristic vs. Impressions of Door County

Never Visited - Excellent Ratings (Top 2 Box on 7 point scale)

DOOR COUNTY EVALUATIONS



Any characteristic where the blue line exceeds the gold line indicates a characteristic Door County is perceived to deliver very well by those who have never visited.

If the gold line exceeds the blue line however, Door County is perceived as not meeting the usual expectations of those who have never visited before.

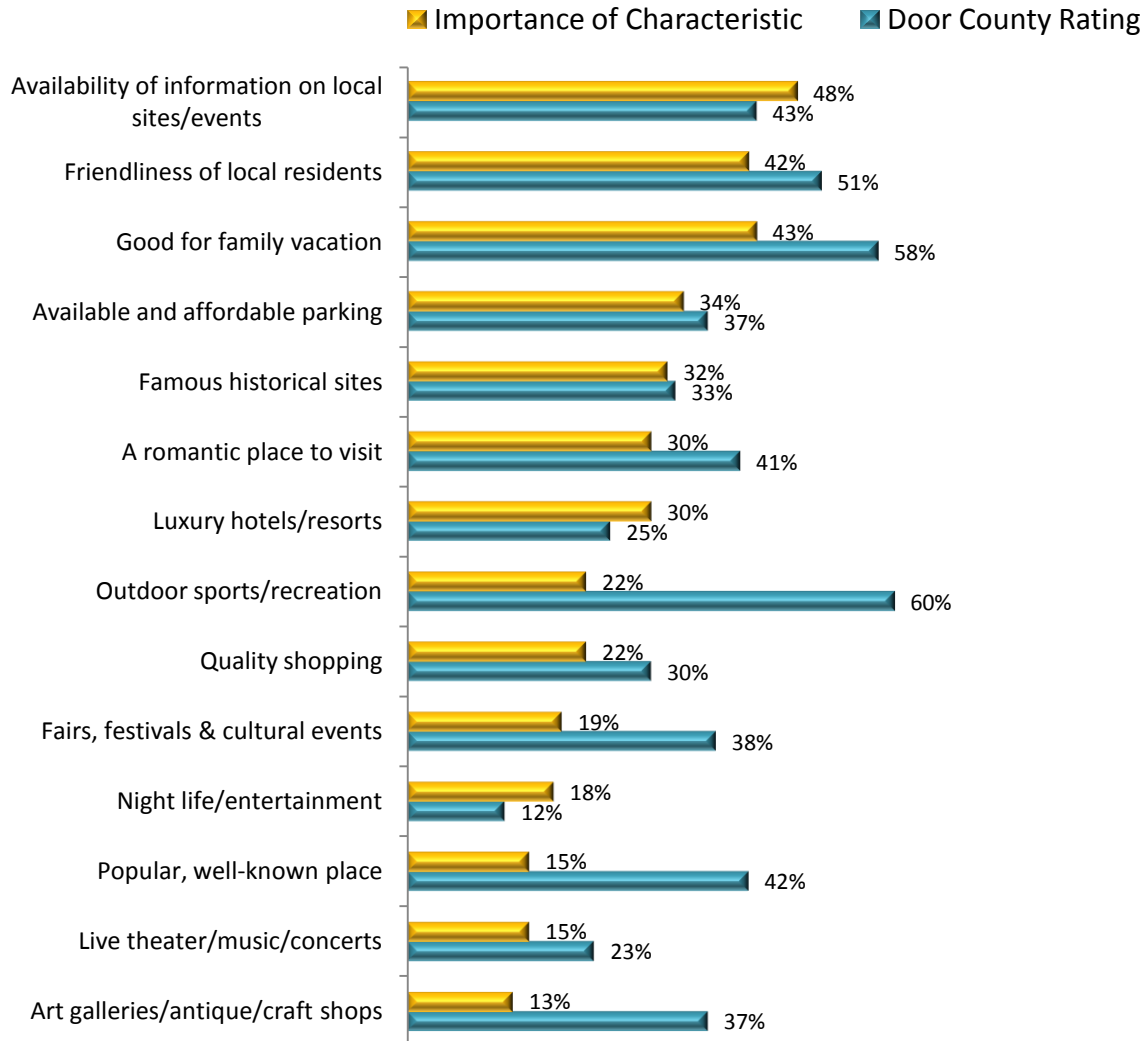
Overall, the impression of those who have never visited is that Door County does not deliver on these characteristics at the level to which they find them important.



Importance of Characteristic vs. Impressions of Door County

Never Visited - Excellent Ratings (Top 2 Box on 7 point scale)

DOOR COUNTY EVALUATIONS



Planning a Trip to Door County in Next 12 Months

Yes No Maybe

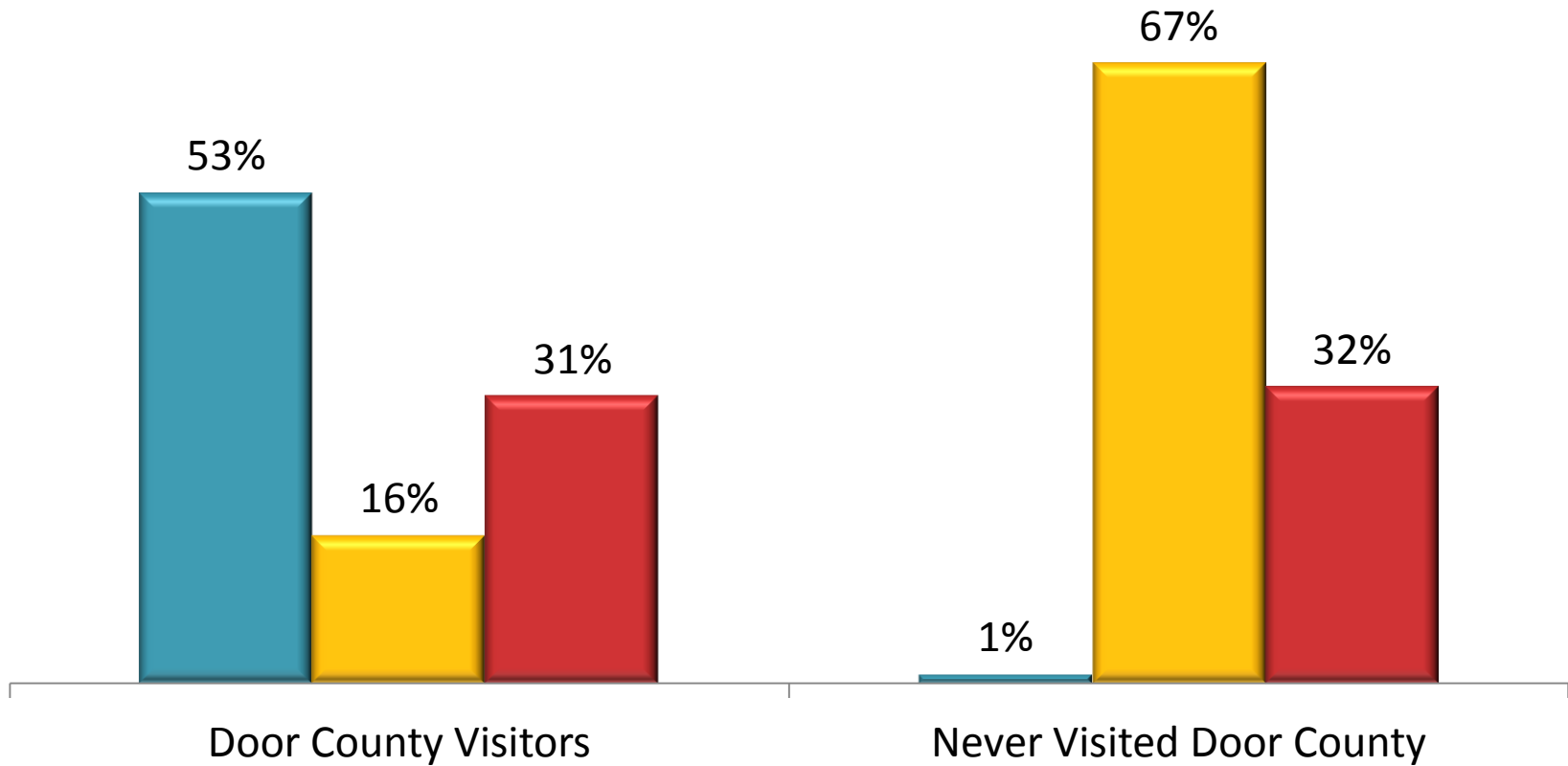


Chart 25A/Question 31 • Visitors in past 12 months n=1,074; Never Visited 1,608

Planning a Trip to Door County in Next 12 Months

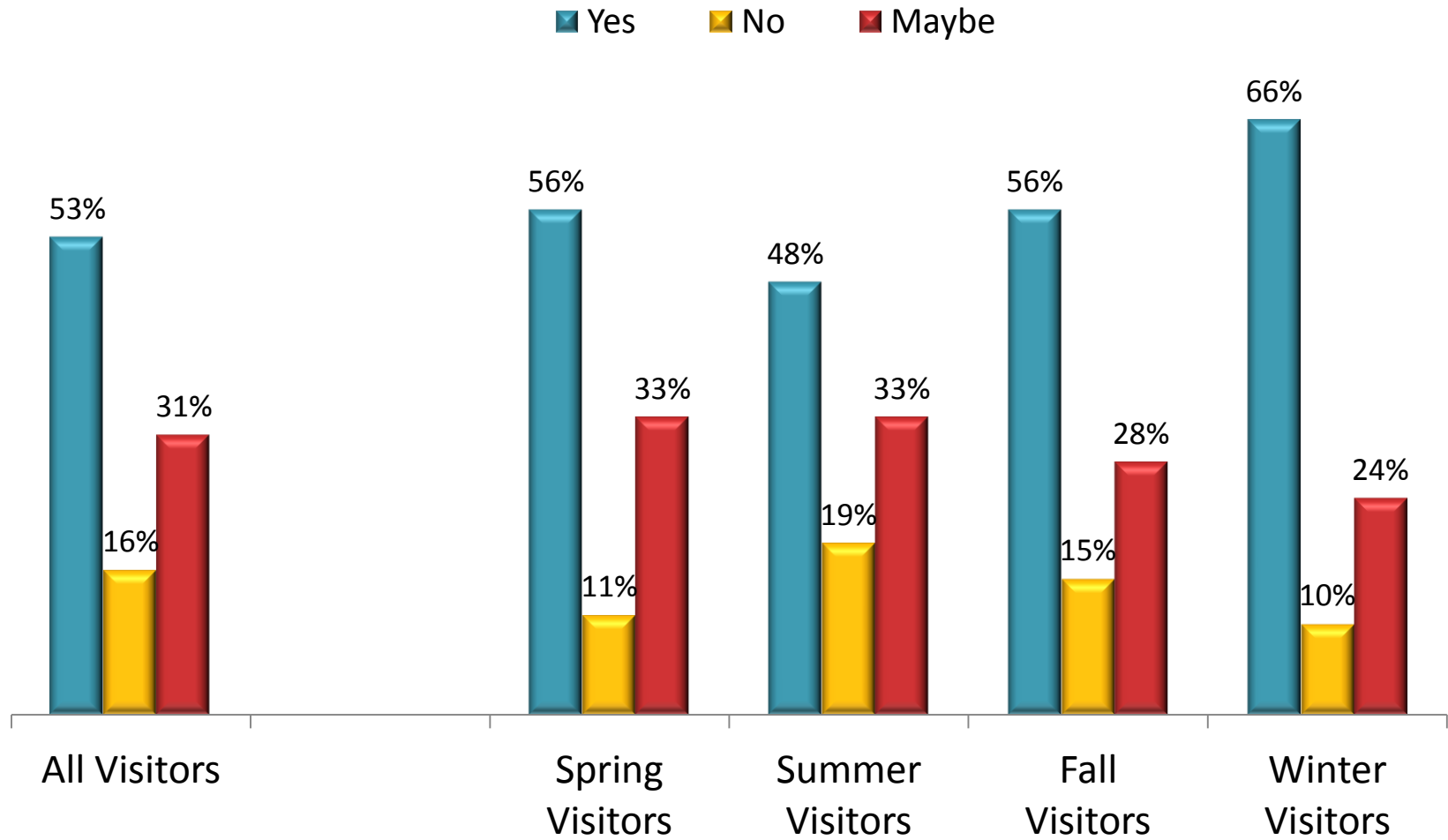


Chart 25B/Question 31 • Visitors in past 12 months n=1,074; Spring Visitors n=141; Summer Visitors n=523; Fall Visitors n=351; Winter Visitors n=59

About DKSA

D.K. Shifflet & Associates Ltd. is the leading U.S. consumer travel research firm. DKSA is located in McLean, VA and has, for the last 27 years, provided the Industry's most complete consumer based travel data on U.S. residents and their travel worldwide. Our clients include destination marketing organizations, theme parks, credit cards, auto clubs, hotel chains and more.

