

Joint Effort Marketing

Year One

FINAL REPORT 2012

Ice Age Trail Alliance



EDP
ECONOMIC
DEVELOPMENT
PARTNERS

Table of Contents

| | |
|---|----|
| Executive Summary | 3 |
| Introduction | 5 |
| Research Objective | 11 |
| Wisconsin Tourism / Outdoor Recreation | 12 |
| Qualitative Research – Online and Field Surveys | 16 |
| Quantitative Research –Mail Survey and Silent Sports Survey Results | 47 |
| Target Market Analysis | 55 |
| Branding – Ice Age Trail Alliance | 58 |
| Preliminary Marketing Plan | 62 |
| Economic Impact – Key Results | 71 |
| Recommendations – Call to Action | 76 |



Appendices

- A. Ice Age Trail Map
- B. Wisconsin Tourism 2011 Data
- C. Updated Brand Manual
- D. Online Survey of IATA Database
- E. Field Survey of Ice Age Trail Users
- F. Mail Surveys to Restaurants, Hotels and Convenience Stores
- G. The Economic Impact of Silent Sports - Wisconsin – May 2011
- H. IATA's Inn Style Directory
- I. IATA Partners

EXECUTIVE SUMMARY

The goals and objectives of this Joint Effort Marketing Year 1 Destination grant were to determine the economic impact of Ice Age Trail users and volunteers to the State's economy on an annual basis; determine the estimated number of users enjoying the Trail annually; and review and revise the existing brand identity, positioning and brand promise based on market research conducted to better understand the Ice Age Trail users – **in short, the customers.**

The Ice Age Trail Alliance (IATA) is a non-profit, volunteer- and member-based organization headquartered in Cross Plains, Wisconsin. Its mission is to create, support and protect the Ice Age National Scenic Trail, a thousand-mile footpath tracing Ice Age formations across Wisconsin. More than 3,000 members nationwide support the IATA in the completion of its mission through on-the-ground work and financial gifts.

The Ice Age Trail, one of only 11 National Scenic Trails in the United States, is a thousand-mile footpath highlighting Wisconsin's world-renowned glacial heritage and scenic beauty. It meanders through 31 counties and numerous communities across the State and provides all the vital elements that hikers, backpackers, trail runners, birders, and other outdoor recreation enthusiasts seek out when participating in their outdoor pursuits, including entertainment, heritage area attractions, natural beauty, diverse terrain, dining and the overall visitor experience. The Trail route takes visitors through some of Wisconsin's most scenic landscapes, highlighting mature forests, expansive prairies and thousands of lakes and rivers. A variety of geological landforms, associated almost exclusively with glaciations, are better seen in Wisconsin than anywhere in the world.

The Ice Age Trail is designated for walking, hiking, backpacking, trail running and snowshoeing over a wide range of distances and landscapes. Much of the Trail offers solitude, but occasionally it takes adventurers right down the main streets of Wisconsin communities, both large and small. Whether a person is seeking a short stroll over gentle terrain or a multiday deep-woods adventure, there is a segment of the Ice Age Trail for all.

Responses collected from more than 1,010 trail users through online, mail, and field surveys at various access points along the Ice Age Trail were used to estimate current patterns of visitor spending as well as the total statewide and local economic impact of trail users, volunteers and outdoor enthusiasts. Surveys conducted and referenced in the study included the University of Wisconsin-Whitewater Fiscal and Economic Research Center (FERC), Tourism Economics and the 2011 Wisconsin Statewide Comprehensive Outdoor Recreation Plan (SCORP). Visitor spending profiles used in the proprietary V2T model were developed for two visitor segments: trail users and IATA volunteers traveling on day trips and/or overnight trips involving stays in local hotels or lodging throughout the Ice Age Trail.

The culmination of these user surveys provides the economic model and findings used within this report. Results indicated that 71.2 percent of respondents are involved in outdoor recreation and silent sports on a daily or weekly basis and are highly motivated and committed

individuals. Eighty-nine percent of users have some form of post-secondary education, 60 percent have a household income greater than \$50,000, and finally, users spend an average of \$50-100 on meals, etc. during their silent sport trip.

Based on the proprietary V2T Model, **the estimated 2012 economic impact of the current 1,252,685 visitors to the Ice Age Trail region is 1,481 full-time equivalent jobs that tend toward the tourism industry. Estimated labor income of \$35,413,364 contributes \$113,961,357 in direct sales** from Ice Age Trail visitors to statewide and local economies. These results highlight the significance of the tourism and subsequent economic impacts that Ice Age Trail users generate in the State of Wisconsin.

Acknowledgements

We would like to acknowledge the contributions of the many people who have helped bring this study to its completion. Economic Development Partners (EDP) gratefully acknowledges the excellent support of the staff at the Fiscal and Economic Research Center (FERC) at the University of Wisconsin-Whitewater with special thanks to Professor Russ Kashian, Professor of Economics, who collected and organized much of the data and information requested. We express sincere gratitude to all volunteers who dedicated over 300 hours of their time to collaborate and compile the tourism inventory data used in this report. We also thank Celtic, Inc. of Brookfield, Wisconsin. In collaboration with the Ice Age Trail Alliance, partner support has been critical to the success of the JEM Destination Year 1 Grant.

INTRODUCTION

The Ice Age Trail, one of only 11 National Scenic Trails in the United States, is a thousand-mile footpath highlighting Wisconsin's world-renowned glacial heritage and scenic beauty. It meanders through 31 counties and numerous communities across the State (See Appendix A - Ice Age Trail Map). The Ice Age National Scenic Trail represents value to the residents of Wisconsin in many ways: valuable conservation, cultural interpretation, quiet recreation and glacial history. The Ice Age Trail also has a significant economic impact on the State of Wisconsin, the Upper Midwest and the nation. Ice Age Trail users spend hundreds of thousands of dollars with local businesses every year, creating jobs and contributing to the economic vitality of the communities bordering the Ice Age Trail. The Ice Age Trail Alliance (IATA) promotes a “buy local” principle to help sustain businesses in these communities. The objective of this study and market research was to determine the value of expenditures and revenues that result from new and existing Ice Age Trail segments.

The Ice Age Trail is built and maintained largely by volunteers. Each year, thousands of volunteers donate tens of thousands of hours toward making the Ice Age Trail a premier hiking trail. In 2012, more than 2,100 volunteers dedicated 69,895 hours of their time to the Ice Age Trail. At the \$21.79 Independent Sector rate for a volunteer hour, that is an economic contribution valued at more than \$1.5 million.

Protecting the Ice Age National Scenic Trail is accomplished with a mosaic of partners, including private donors, landowners, businesses, non-profit organizations and city, county, state and other municipal governments. The Ice Age Trail is indeed a partnership. The National Park Service, the Wisconsin Department of Natural Resources and local units of government provide funding — in most cases, favorably leveraged with private resources — to assure success in moving the Ice Age Trail toward completion.

The IATA wants to never lose sight of the most important beneficiary of the Ice Age Trail — the users. **An estimated 1,252,685 users visit the Ice Age Trail based on the field survey results.** They take many forms: hikers, walkers, birders, wildflower enthusiasts, runners, scouts, and countless more. For these users, the Trail is a convenient, inexpensive opportunity for improved health and fitness, outdoor education and peaceful relaxation. More than 3.4 million Wisconsinites live within one hour of the Ice Age Trail, and regionally, roughly 18 million Americans live within a two-hour drive of the Trail.

Project Overview

The goals and objectives of this Joint Effort Marketing research initiative is threefold: (1) to unearth and revise a statewide brand for the Ice Age Trail, (2) conduct market research that will become the foundation for implementing the new brand, and (3) to evaluate the economic impact of the Ice Age Trail users and volunteers on an annual basis and to determine the estimated number of users enjoying the Trail annually.

The Ice Age Trail Alliance has not been marketed as a region with consistency or with a distinctive brand identity. In addition, since the number of annual users of the Ice Age Trail had not been previously quantified, the economic impact of the Trail was unknown.

Market research was conducted across a four-state region that focused on exploring the attitudes, behaviors and spending patterns of potential tourists, visitors and volunteers of the Ice Age Trail. This information would then be used to validate what marketing and branding strategies are needed to develop the Ice Age Trail as a more cohesive tourism destination and brand.

It was the goal of this project to define a brand promise that will convey the essence and commitment of the Ice Age Trail to the traveling public and develop a brand strategy that would provide the collaborative architecture for partners and stakeholders to develop and implement their economic development and tourism initiatives aimed at Ice Age Trail users.

Project Goals

- ◆ Research Ice Age Trail user profiles and spending patterns – identify target markets
- ◆ Recommend hiking tours/itineraries planning and development to align with user profiles
- ◆ Engage area partners, Alliance members, chapters and volunteers – online survey
- ◆ Implement and measure quantitative and qualitative market research plan
- ◆ Estimate economic impact of the Ice Age Trail users and volunteers on an annual basis
- ◆ Recommend a marketing and branding plan for the Trail

Economic Impact of the IATA Volunteers

The Trail's volunteers contribute a positive economic impact that reaches local economies before, during and long after on-the-ground trail construction occurs. The impact begins with the land acquisition process. The staff of the Ice Age Trail Alliance, state, federal and numerous other partners identify land opportunities with willing sellers. The process employs not only these staff but professional service providers. Surveyors, appraisers, realtors and other local businesses are also engaged.

Trail development is the next step in the ladder of economic development. Quiet travel dollars and professional contracted services flow into the community. Trail-building projects have a substantial and diverse impact in local communities. As many as 350 volunteers arrive for 4- to 7-day projects. Each travels to the site at his or her own expense and invests personal dollars into the local economy. They buy groceries, fuel, beverages, meals and frequent local businesses. A strong ethic exists within the organization to buy local for lumber, sanitation, catering, hardware and construction services.

One mile of trail construction equates to an investment of \$30,000 in local economies. Though a constructed mile of trail takes varying amount of time given numerous complexities, five hundred or more trail miles are left to complete. Six hundred miles require ongoing maintenance. The substantial economic impact of the Ice Age National Scenic Trail is real. The IATA continues to invest in local economies as they manage, maintain and improve the Trail and the land on which it is built.

The Ice Age Trail Alliance has been a Wisconsin corporation for over 50 years with its headquarters in Cross Plains. Employing a staff of 9, the Ice Age Trail Alliance contributes to local communities through property taxes, contracted services and other investments every day.

The Ice Age Trail Alliance volunteers have a positive economic impact on the State:

- ◆ In 2012, **2,184 volunteers** dedicated more than **69,896 volunteer hours** to the Ice Age Trail. These numbers represent a consistent growth in both number of volunteers and hours contributed.
- ◆ At the \$21.79 Independent Sector rate for a **volunteer hour**, that is an **economic contribution valued at more than \$1.5 million** for IATA volunteers alone.
- ◆ Create jobs
- ◆ Provide diverse recreation and conservation activities
- ◆ Provide educational opportunities
- ◆ Implement youth engagement programs
- ◆ Promote environmental stewardship and community service

“High quality and accessible outdoor recreation builds healthy communities, provides numerous health benefits to citizens, and allows Wisconsinites to enjoy the state’s many natural resources.”
SCORP 2012

Results of the Project

Market research was implemented by online and mail surveys to over 1,000 current and potential Ice Age Trail visitors spanning across Wisconsin, Illinois, Minnesota and Iowa. Participants were encouraged to contribute information, perceptions and opinions that related to any Ice Age Trail location.

Participants acknowledged that the top three reasons they travel to the Ice Age Trail is to use the beautiful Trail (30.2 percent), traveling for a leisure trip (22.4 percent) and to enjoy the outdoors (16.5 percent). The extensive natural beauty and Trail that supports their silent sports are important draws to the area and should be used as assets. However, equally important was respondents' lack of knowledge about the Ice Age Trail. Working jointly along the Trail to promote the whole region and even extending outside of the communities is desirable to draw tourists to the area.

Key Findings

◆ What opportunities does the Ice Age Trail in Wisconsin provide for tourists?

Visitors to the Ice Age Trail come for the beauty of enjoying the unique natural resources, enjoying hiking and outdoor activities, to exercise for health, wellness and fitness experiences that provide a new adventure around every bend. The trip is never the same, and they can enjoy it in any season.

The region offers visitors authentic experiences. The Ice Age Trail, a thousand-mile footpath, highlights Wisconsin's world-renowned Ice Age heritage and scenic beauty.

◆ What demographic groups(s) should be targeted?

The culmination of these visitor surveys indicated that 71.2 percent of respondents are involved in outdoor recreation and silent sports on a weekly or daily basis and are highly motivated and committed, 89 percent of the trail users have some form of post-secondary education, 60 percent of the users come from a household whose income is greater than \$50,000, and outdoor recreation/silent sport enthusiasts spent an average of \$50-100 on meals, etc. during their silent sport trip. Nearly 93 percent were repeat users and used the Trail an average of 10.26 times per year. The participation rate among users who live in communities with designated access to the Ice Age Trail is higher than those without easy access.

From the market research gained from both the field and online surveys uncovered two specific target demographic groups that IATA should concentrate their marketing to.

- 1 **The first group of potential users is from 31 – 45 years old, with an annual income of \$40,000–59,000.** They are highly motivated, committed and enamored with the Ice Age Trail. The highest percentage of hikers is between the ages of 35 to 44 with an average age of 38. Many of these trail users have some form of

post-secondary education, and when they travel, they make their travel decisions based on online research, word-of-mouth (family and friends), and checking tourism activities that relate to their interests and activities they enjoy. Many of these visitors enjoy the specialty foods, breweries, wineries and artisan cheeses of the region and spent an average of \$50 – 100 on meals during their visit.

This group enjoys dining out at quality restaurants that feature local and regional foods, enjoys outdoor activities and shopping.

- 2 **The second group is from 18 - 30 years old, with an annual income of less than \$40,000.** This group is growing and more young people are making outdoor recreation, silent sports like hiking and trail running part of their fitness routine and part of their lifestyle. They are classified as outdoor enthusiasts that have a passion for adventure seeking, enjoying outdoor recreation, various silent sports and extreme sports. In this age group, many use technology to connect to the outdoors; more than 60 percent of this age group uses technology to search for information about outdoor recreation, including online research, social media, blog sites and QR codes. The Ice Age Trail provides vital elements that silent sport enthusiasts are looking for when participating in their sports including natural beauty, terrain, relaxing environment, and the overall experience building a lifelong bond between them and the outdoors. The Ice Age Trail has an abundance of silent sports activities for this group and should be marketed as such.

Research shows that to foster the next generation of outdoor enthusiasts and environmental stewards, we must continue working together to engage young people in the outdoors. Using the findings from the *2011 Outdoor Recreation Participation Report and the Silent Sports 2011 Survey*, we can identify trends in participation, understand what motivates people, and begin to build a strong bond between our young people and the outdoors.

◆ **Which geographic locations are primary and secondary target markets?**

The market research indicates Madison, metropolitan Milwaukee, and northern Illinois are the primary target markets for the region. Secondary markets include Minnesota and Iowa.

◆ **What percentage of users stay overnight during their trips?**

- ▶ Fifty-one percent stayed overnight among the trail users surveyed, and they stay an average of 2.88 nights. Nearly 52 percent stay in campgrounds and about 16 percent stay in hotels.
- ▶ Forty-nine percent were day trippers, enjoying the trail for the day and then returning home.

◆ **What is current brand recognition for the Ice Age Trail among potential and current users – What attributes come to mind?**

The market research indicates how tourists generally perceive the Ice Age Trail region and what it means. For those who have traveled and visited the region, they reported the following when asked what attributes come to mind when they think of the Ice Age Trail.

The primary answer to this question was how people feel about the Ice Age Trail. Key words included beautiful, peaceful, quiet, relaxing and serene.

The secondary answer to this question is about the natural beauty of the Trail.

However, visitors who had not traveled to the region reported that they either did not know what the Ice Age Trail meant or were unaware of the unique attributes of the Trail and surrounding area. Given this information, the primary focus of the marketing program for the Ice Age Trail would be to launch a strong and consistent branding and educational campaign to better educate all visitors and users of the uniqueness and adventure that the Ice Age Trail offers – ‘Take a walk through time.’

◆ **What is name recognition for the Ice Age Trail among potential and current tourists?**

The objective of this branding study and initiative was to evaluate the existing Ice Age Trail brand based on the market research conducted among the current and potential users, volunteers and stakeholders. Develop a brand platform, identity, positioning and a tagline to create an overarching regional brand that reflects the uniqueness of the Trail further needs to be honest, relevant and clearly articulated to move the Trail experience from good to great.

◆ **Which attributes or characteristics of the area resonate the most with tourists?**

The attributes that the survey participants described about the Ice Age Trail were:

- **Beautiful** - Stunning views. Breathtaking experience.
- **Natural** - Step into the icy past of Wisconsin and see the beauty of the state.
- **Peaceful** - Serene. Tranquil. Relaxing. Connect to the land. Escape.
- **Adventure** - What lies ahead around the next bend? Never the same trip.

RESEARCH OBJECTIVE

The goal of this study was to conduct market research about both the socioeconomic and lifestyle preferences to better understand the current users and attract new users to the Trail by allowing IATA to make decisions regarding the use of their resources to expand usage of the Trail and increase the beneficial impact of tourism on the partnering communities that border the Trail in the State.

The research objective was to emerge from this project with a **clearly aligned and defined brand identity, promise, and tagline** that will convey the IATA's commitment to the traveling public as well as a brand blueprint that will provide the collaborative architecture for the brand positioning for staff, partners, stakeholders and communities to implement within their economic development and tourism initiatives.

The market research was focused on exploring the attitudes and spending behaviors of potential users. Validating information in order to proceed with a branding and marketing campaign based on current and accurate data includes the following:

- ◆ Ice Age Trail user surveys and profiles - target markets
- ◆ Hiking tours/itineraries - developed to align with user profiles in Year 2
- ◆ Engage area partners through online surveys – restaurants, hotels and convenience stores
- ◆ Survey the Ice Age Trail Alliance members, volunteers, and supporters through an online survey
- ◆ Estimate annual usage of the Ice Age Trail
- ◆ Estimated economic impact of the Ice Age Trail
- ◆ Qualitative and quantitative market research results – field surveys, mail and online survey results
- ◆ Recommendations – next steps
- ◆ Tracking plan – Year 3

WISCONSIN TOURISM / OUTDOOR RECREATION

Wisconsin's tourism economy picked up steam in 2011 with an impact on the state of \$16 billion, an increase of 8 percent from \$14.8 billion in 2010 according to research conducted by Longwoods International. **Over 94 million people visited the state, up two years in a row.** Tourism also supported 181,000 jobs and \$4.4 billion in personal income. Fully one in 13 jobs in Wisconsin relies on tourism. Lodging sales increased 18 percent from the lows of 2009 at the height of the recession. Visitors generated \$1.3 billion in state and local revenue and \$950 million in federal taxes in 2011 saving the Wisconsin taxpayers nearly *\$545 per household*.

The 2011 tourism campaign motivated more than 2.1 million visits in the summer and fall and generated an additional \$257 million in tourism spending and \$22 million in tax revenue according to Longwoods International, a tourism consulting firm that conducted the study for the Department of Tourism. For every \$1 the department spent on the \$3.5 million advertising campaign, \$5 was returned to state and local governments in incremental tax revenue. The department received a nearly 20 percent increase in appropriation for fiscal years 2011-12. That increase came at a critical juncture when the tourism economy was showing signs of rebounding from a prolonged recession.

Longwoods International is a globally recognized leader in travel research with over 30 years of experience with hospitality clients. (See more of the Wisconsin Tourism 2011 Data in Appendix B)

Key Results for 2011

- ◆ The Wisconsin tourism recovery accelerated in 2011 with a 7.6 percent rise in visitor spending after a 7.9 percent increase in 2010.
- ◆ Visitor volumes rose for a second straight year with **95.4 million** people visited Wisconsin in 2011.
- ◆ Growth in overnight visitation remains strong. Domestic overnight visitation grew 3.7 percent buoyed by strong room demand growth of 3.6 percent in 2011.
- ◆ Per trip spending rose as gas prices rose and other tourism providers started to recoup recessionary price cuts.
- ◆ Visitor spending of \$10 billion generated \$16 billion in total business sales in 2011.
- ◆ The visitor economy represents a significant source of business sales, employment, and taxes in Wisconsin.
- ◆ Total tourism business sales of \$16.0 billion in 2011 sustained 181,000 jobs, both directly and indirectly.

- ◆ These jobs represent 7.8 percent of total employment in Wisconsin; one in every 13 jobs in the state is sustained by tourism activity.
- ◆ Including indirect and induced impacts, tourism in Wisconsin generated \$1.3 billion in state and local taxes and \$950 million in federal taxes last year.
- ◆ In the absence of the state and local taxes generated by tourism, each Wisconsin household would need to pay \$565 to maintain the current level of government services.

Active Outdoor Recreation Creates Economic Growth

Americans spend money, generate jobs, and support local communities when they get outdoors. Simple, healthy outdoor activities such as hiking, camping, paddling or bird/wildlife viewing generate enormous economic power.

The State of Wisconsin offers spectacular recreation opportunities along the Ice Age Trail that bring in tourist dollars from out-of-state outdoor recreation enthusiasts. According to a report generated by The Outdoor Foundation, a non-for-profit foundation established by the Outdoor Industry Association, Wisconsin's active outdoor recreation economy:

- ◆ Contributes over \$9.7 billion annually to Wisconsin's economy
- ◆ Supports 129,000 jobs across Wisconsin
- ◆ Generates \$570 million in annual state tax revenue
- ◆ Produces \$7.5 billion annually in retail sales and services across Wisconsin – accounting for nearly 4 percent of gross state product

Wisconsin has a large base of active outdoor recreation enthusiasts:

| | Activity Category | Number of Participants | % of Population |
|---|---|-------------------------------|------------------------|
|  | CAMPING <ul style="list-style-type: none"> • RV camping at a campsite • Tent camping at a campsite • Rustic lodging | 1,133,121 | 27 % |
|  | FISHING <ul style="list-style-type: none"> • Recreational fly • Recreational non-fly | 909,947 | 20 % |
| | HUNTING <ul style="list-style-type: none"> • Shotgun • Rifle • Bow | 578,004 | 13 % |
|  | SNOW SPORTS <ul style="list-style-type: none"> • Downhill skiing • Snowboarding • Cross-country or nordic skiing • Snowshoeing | 530,253 | 13 % |
|  | TRAIL <ul style="list-style-type: none"> • Trail running on an unpaved trail • Day hiking on an unpaved trail • Backpacking | 1,040,242 | 25 % |
|  | WILDLIFE VIEWING <ul style="list-style-type: none"> • Bird watching • Other wildlife watching | 2,159,000 | 48 % |

| Visitor Spending and Impacts | | | | | | | | | | |
|------------------------------|------------------|------------------|----------------|----------------|------------------|------------------|------------------|------------------|----------------|----------------|
| Wisconsin and Counties | | | | | | | | | | |
| County | Visitor Spending | | Employment | | Labor Income | | Taxes | | | |
| | Millions | | | | Millions | | State and Local | | Federal | |
| | 2010 | 2011 | 2010 | 2011 | 2010 | 2011 | 2010 | 2011 | 2010 | 2011 |
| Wisconsin | \$9,197.3 | \$9,897.7 | 180,608 | 181,369 | \$4,292.2 | \$4,418.5 | \$1,202.1 | \$1,270.9 | \$917.6 | \$951.7 |
| Adams County | \$166.9 | \$177.5 | 2,427 | 2,360 | \$44.4 | \$47.1 | \$21.4 | \$22.4 | \$14.7 | \$15.7 |
| Ashland County | \$28.6 | \$29.3 | 586 | 559 | \$11.6 | \$11.2 | \$4.0 | \$4.1 | \$2.7 | \$2.6 |
| Barron County | \$76.9 | \$81.2 | 1,377 | 1,344 | \$26.6 | \$26.7 | \$9.2 | \$9.6 | \$5.5 | \$5.5 |
| Bayfield County | \$38.9 | \$38.5 | 653 | 599 | \$10.7 | \$10.0 | \$5.2 | \$5.2 | \$3.4 | \$3.3 |
| Brown County | \$480.0 | \$536.9 | 10,949 | 11,339 | \$367.0 | \$383.3 | \$76.5 | \$82.2 | \$93.2 | \$97.9 |
| Buffalo County | \$8.5 | \$9.2 | 173 | 173 | \$3.3 | \$3.4 | \$1.1 | \$1.1 | \$0.6 | \$0.6 |
| Burnett County | \$21.9 | \$21.5 | 422 | 384 | \$6.6 | \$6.2 | \$2.9 | \$2.9 | \$1.7 | \$1.6 |
| Calumet County | \$23.2 | \$23.8 | 620 | 609 | \$11.1 | \$11.4 | \$3.2 | \$3.3 | \$1.8 | \$1.8 |
| Chippewa County | \$66.2 | \$75.2 | 1,296 | 1,341 | \$26.2 | \$27.4 | \$8.2 | \$8.8 | \$4.4 | \$4.6 |
| Clark County | \$22.1 | \$23.3 | 354 | 349 | \$6.1 | \$6.1 | \$2.5 | \$2.6 | \$1.4 | \$1.4 |
| Columbia County | \$88.3 | \$106.0 | 1,585 | 1,747 | \$29.8 | \$33.0 | \$11.9 | \$13.2 | \$6.9 | \$7.7 |
| Crawford County | \$33.0 | \$37.2 | 681 | 713 | \$11.7 | \$12.4 | \$4.9 | \$5.3 | \$3.2 | \$3.4 |
| Dane County | \$817.7 | \$893.7 | 18,688 | 18,984 | \$467.1 | \$484.3 | \$114.5 | \$121.9 | \$90.6 | \$94.8 |
| Dodge County | \$57.9 | \$60.4 | 1,383 | 1,352 | \$29.5 | \$29.9 | \$7.6 | \$7.8 | \$5.1 | \$5.1 |
| Door County | \$266.9 | \$271.2 | 3,121 | 2,921 | \$64.8 | \$62.3 | \$29.8 | \$30.7 | \$20.2 | \$19.9 |
| Douglas County | \$65.5 | \$69.8 | 1,218 | 1,182 | \$23.9 | \$24.1 | \$8.5 | \$8.8 | \$5.8 | \$5.9 |
| Dunn County | \$36.5 | \$39.2 | 809 | 819 | \$14.9 | \$15.3 | \$5.0 | \$5.3 | \$3.1 | \$3.2 |
| Eau Claire County | \$166.8 | \$184.9 | 3,879 | 3,971 | \$81.2 | \$84.3 | \$23.2 | \$24.8 | \$15.5 | \$16.2 |
| Florence County | \$4.0 | \$4.2 | 89 | 87 | \$1.3 | \$1.4 | \$0.5 | \$0.5 | \$0.2 | \$0.2 |
| Fond du Lac County | \$84.4 | \$103.6 | 2,146 | 2,368 | \$46.5 | \$50.7 | \$12.5 | \$14.1 | \$8.0 | \$9.0 |
| Forest County | \$10.7 | \$10.9 | 221 | 212 | \$2.9 | \$2.7 | \$1.5 | \$1.5 | \$0.8 | \$0.8 |
| Grant County | \$39.7 | \$40.0 | 950 | 896 | \$18.8 | \$18.7 | \$5.1 | \$5.2 | \$3.1 | \$3.0 |
| Green County | \$31.0 | \$35.5 | 746 | 745 | \$15.6 | \$15.9 | \$4.3 | \$4.5 | \$2.6 | \$2.7 |
| Green Lake County | \$28.9 | \$32.7 | 687 | 716 | \$12.0 | \$12.9 | \$4.6 | \$4.9 | \$2.8 | \$3.1 |
| Iowa County | \$29.2 | \$29.6 | 432 | 418 | \$10.1 | \$10.2 | \$2.9 | \$3.0 | \$1.6 | \$1.6 |
| Iron County | \$16.6 | \$17.2 | 269 | 259 | \$4.5 | \$4.5 | \$2.2 | \$2.2 | \$1.4 | \$1.4 |
| Jackson County | \$28.7 | \$30.7 | 517 | 557 | \$8.2 | \$8.9 | \$3.8 | \$4.2 | \$2.2 | \$2.4 |
| Jefferson County | \$77.0 | \$78.9 | 1,655 | 1,600 | \$34.5 | \$34.2 | \$9.5 | \$9.7 | \$5.9 | \$5.8 |
| Juneau County | \$53.4 | \$51.4 | 726 | 672 | \$12.4 | \$11.5 | \$5.7 | \$5.8 | \$3.3 | \$3.1 |
| Kenosha County | \$144.0 | \$155.8 | 2,846 | 2,860 | \$63.8 | \$65.5 | \$17.4 | \$18.4 | \$11.7 | \$12.1 |
| Kewaunee County | \$12.8 | \$15.3 | 276 | 288 | \$4.2 | \$4.5 | \$1.8 | \$1.9 | \$0.9 | \$1.0 |
| La Crosse County | \$181.8 | \$193.7 | 3,828 | 3,813 | \$83.2 | \$84.6 | \$24.4 | \$25.6 | \$17.3 | \$17.7 |
| Lafayette County | \$10.6 | \$11.7 | 201 | 206 | \$2.9 | \$3.0 | \$1.4 | \$1.5 | \$0.8 | \$0.8 |
| Langlade County | \$37.8 | \$42.1 | 508 | 509 | \$9.5 | \$10.0 | \$4.1 | \$4.3 | \$2.3 | \$2.4 |
| Lincoln County | \$39.6 | \$44.9 | 651 | 656 | \$12.1 | \$12.5 | \$4.6 | \$4.8 | \$2.5 | \$2.6 |
| Manitowoc County | \$93.1 | \$105.1 | 2,091 | 2,188 | \$39.6 | \$42.1 | \$13.7 | \$14.8 | \$8.9 | \$9.6 |
| Marathon County | \$181.9 | \$194.7 | 3,985 | 3,966 | \$84.1 | \$85.5 | \$24.4 | \$25.6 | \$16.4 | \$16.7 |
| Marinette County | \$115.7 | \$123.6 | 1,611 | 1,561 | \$29.7 | \$29.8 | \$12.8 | \$13.3 | \$8.0 | \$8.1 |
| Marquette County | \$16.0 | \$18.1 | 273 | 285 | \$4.1 | \$4.3 | \$2.2 | \$2.3 | \$1.2 | \$1.3 |
| Menominee County | \$2.0 | \$2.1 | 49 | 49 | \$0.6 | \$0.6 | \$0.3 | \$0.3 | \$0.2 | \$0.2 |
| Milwaukee County | \$1,467.5 | \$1,573.9 | 29,366 | 29,658 | \$930.4 | \$963.8 | \$186.8 | \$198.2 | \$189.7 | \$198.4 |
| Monroe County | \$58.7 | \$70.9 | 1,055 | 1,198 | \$19.7 | \$22.3 | \$8.1 | \$9.2 | \$4.9 | \$5.6 |
| Oconto County | \$64.5 | \$70.0 | 834 | 843 | \$14.2 | \$14.9 | \$6.8 | \$7.3 | \$3.8 | \$4.1 |
| Oneida County | \$179.1 | \$176.0 | 2,256 | 2,048 | \$45.0 | \$42.8 | \$18.2 | \$18.3 | \$11.4 | \$11.0 |
| Outagamie County | \$260.1 | \$283.3 | 6,217 | 6,265 | \$137.3 | \$141.9 | \$36.5 | \$38.6 | \$24.0 | \$25.0 |
| Ozaukee County | \$71.1 | \$74.3 | 1,890 | 1,873 | \$46.8 | \$47.7 | \$9.5 | \$10.0 | \$7.0 | \$7.1 |
| Pepin County | \$4.5 | \$4.9 | 97 | 96 | \$1.7 | \$1.8 | \$0.6 | \$0.6 | \$0.3 | \$0.3 |
| Pierce County | \$21.8 | \$23.4 | 406 | 407 | \$7.6 | \$7.7 | \$2.7 | \$2.9 | \$1.7 | \$1.7 |
| Polk County | \$70.1 | \$69.4 | 1,070 | 993 | \$19.7 | \$18.7 | \$7.5 | \$7.6 | \$4.5 | \$4.3 |
| Portage County | \$92.5 | \$98.3 | 2,074 | 2,056 | \$40.5 | \$40.8 | \$13.2 | \$13.8 | \$8.9 | \$9.0 |
| Price County | \$19.6 | \$17.3 | 402 | 337 | \$5.8 | \$5.2 | \$2.5 | \$2.4 | \$1.4 | \$1.3 |
| Racine County | \$185.2 | \$203.7 | 3,886 | 3,962 | \$90.7 | \$93.9 | \$23.2 | \$24.8 | \$15.4 | \$16.1 |
| Richland County | \$15.2 | \$16.8 | 304 | 310 | \$5.9 | \$5.9 | \$2.0 | \$2.1 | \$1.2 | \$1.2 |
| Rock County | \$159.4 | \$174.9 | 3,428 | 3,516 | \$73.4 | \$74.9 | \$20.7 | \$22.1 | \$13.5 | \$13.8 |
| Rusk County | \$17.7 | \$21.2 | 359 | 379 | \$6.7 | \$7.1 | \$2.5 | \$2.7 | \$1.5 | \$1.6 |
| St. Croix County | \$69.4 | \$74.4 | 1,622 | 1,584 | \$32.4 | \$32.7 | \$9.6 | \$9.9 | \$6.3 | \$6.3 |
| Sauk County | \$754.2 | \$809.6 | 10,495 | 10,449 | \$195.0 | \$204.1 | \$96.3 | \$101.8 | \$63.0 | \$66.7 |
| Sawyer County | \$72.7 | \$71.7 | 1,029 | 945 | \$20.3 | \$19.3 | \$8.8 | \$8.9 | \$6.1 | \$6.0 |
| Shawano County | \$53.1 | \$52.7 | 940 | 876 | \$16.4 | \$16.0 | \$6.3 | \$6.4 | \$3.8 | \$3.7 |
| Sheboygan County | \$169.7 | \$180.2 | 3,362 | 3,308 | \$69.5 | \$66.3 | \$22.8 | \$23.6 | \$16.1 | \$15.0 |
| Taylor County | \$22.2 | \$22.3 | 375 | 352 | \$6.5 | \$6.4 | \$2.5 | \$2.5 | \$1.5 | \$1.4 |
| Trempealeau County | \$20.8 | \$21.4 | 389 | 371 | \$7.0 | \$6.9 | \$2.5 | \$2.6 | \$1.5 | \$1.4 |
| Vernon County | \$27.6 | \$28.8 | 472 | 469 | \$8.7 | \$8.5 | \$3.2 | \$3.4 | \$1.9 | \$1.8 |
| Vilas County | \$178.5 | \$177.2 | 2,040 | 1,860 | \$37.8 | \$35.5 | \$18.7 | \$19.0 | \$12.0 | \$11.6 |
| Walworth County | \$360.1 | \$409.7 | 5,902 | 6,268 | \$124.7 | \$135.9 | \$48.5 | \$52.9 | \$34.3 | \$37.8 |
| Washburn County | \$21.8 | \$22.8 | 482 | 475 | \$9.6 | \$9.7 | \$3.0 | \$3.1 | \$1.9 | \$2.0 |
| Washington County | \$87.3 | \$92.8 | 2,165 | 2,159 | \$53.5 | \$54.5 | \$11.3 | \$11.9 | \$8.5 | \$8.6 |
| Waukesha County | \$570.6 | \$617.5 | 13,711 | 13,818 | \$340.1 | \$350.4 | \$76.9 | \$81.4 | \$56.7 | \$58.8 |
| Waupaca County | \$71.2 | \$77.5 | 1,274 | 1,267 | \$21.4 | \$21.5 | \$9.2 | \$9.6 | \$5.4 | \$5.4 |
| Waushara County | \$61.4 | \$59.8 | 926 | 840 | \$13.8 | \$12.5 | \$7.0 | \$7.0 | \$4.1 | \$3.8 |
| Winnebago County | \$189.6 | \$201.7 | 4,645 | 4,615 | \$102.8 | \$105.7 | \$25.5 | \$26.7 | \$16.6 | \$17.3 |
| Wood County | \$75.2 | \$78.6 | 2,158 | 2,115 | \$50.3 | \$50.9 | \$10.2 | \$10.6 | \$6.4 | \$6.4 |

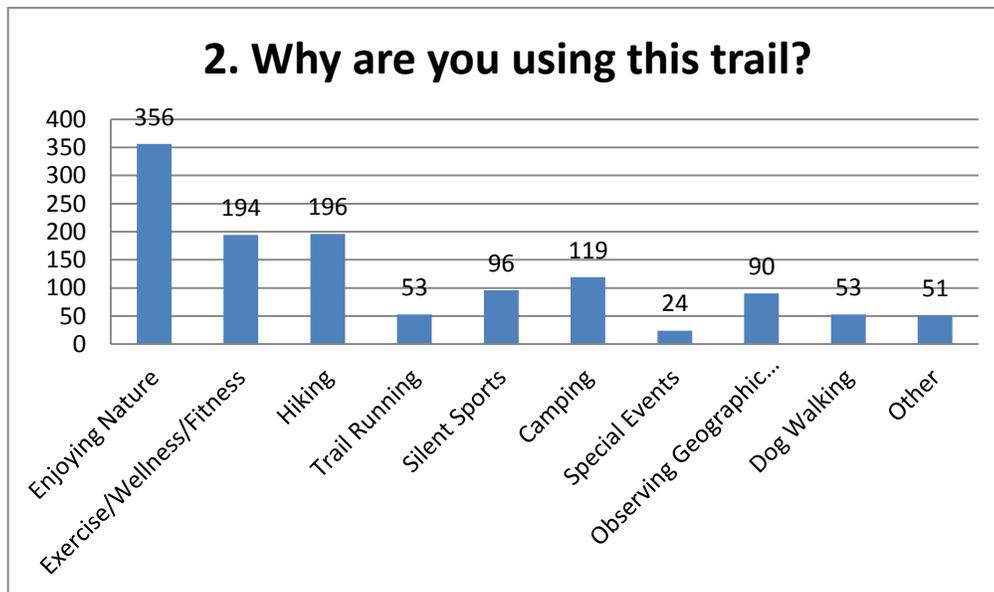
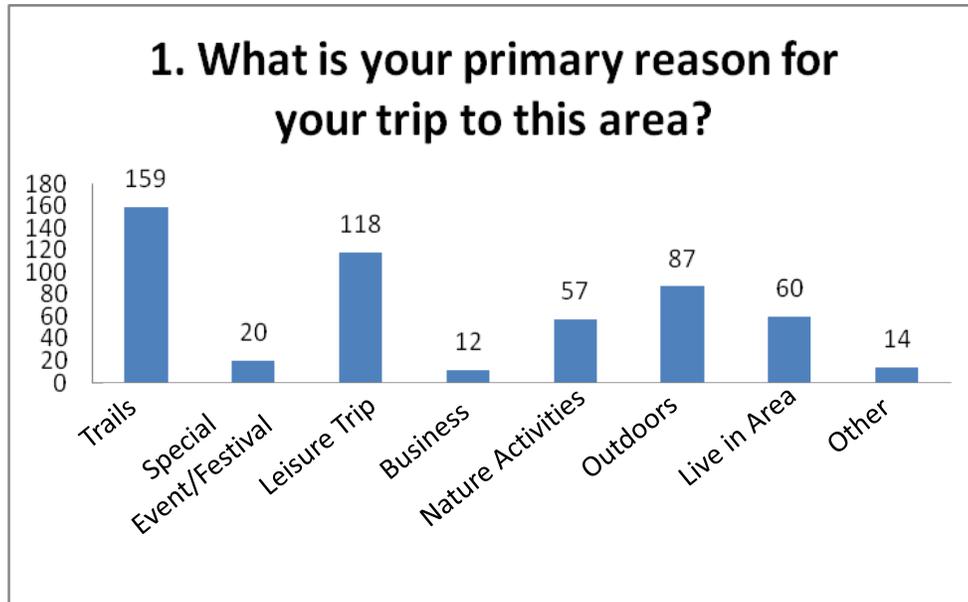
QUALITATIVE RESEARCH – ONLINE AND FIELD SURVEYS

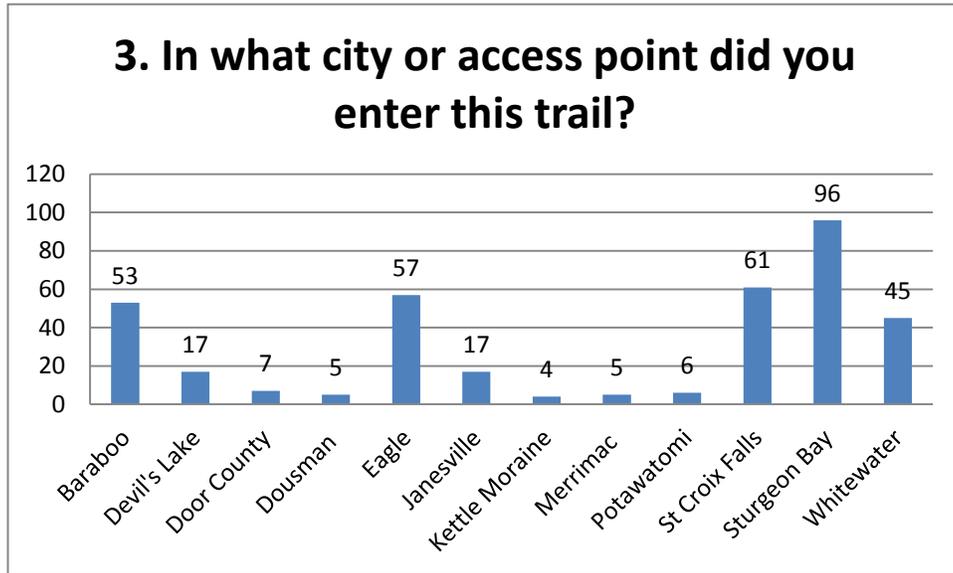
Analyzed input from current and potential Trails users was collected through a variety of online and in-person methods. Our goal is to uncover the users' emotions and feelings about the Ice Age Trail as an outdoor recreation destination as well as specific socioeconomic and lifestyle preferences of the trail user base, so that the IATA can begin to make decisions about how to attract new users into the greater area and expand trail usage activities. The Brand Manual (Appendix C) reviews and redefines a meaningful IATA brand identity, brand promise, tagline and personality. The following strategies and tactics were implemented to gather these data:

Conducted online market research campaign – an online survey was created and deployed to the IATA database and networks to reach out to current and potential users including: IATA's e-database and website; tourism partners' e-databases; Facebook, and Twitter. A total of 356 responses or 17 percent were completed and analyzed. (See Appendix D for full report)

Field intercept surveys (See Appendix E) were developed and implemented for data collection. Field market researchers were hired, trained and deployed onsite to various Trail access points throughout the State to interview users at trail gateway destinations during peak and shoulder tourism times to record number of users, usage patterns and frequency, demographics, lifestyle preferences, socioeconomic data, and input from existing and potential users/visitors. Over 556 field surveys conducted during the summer months of 2012 were tabulated and analyzed, and the following is a recap of the trail and online survey results.

Field Intercept Survey Questions and Responses

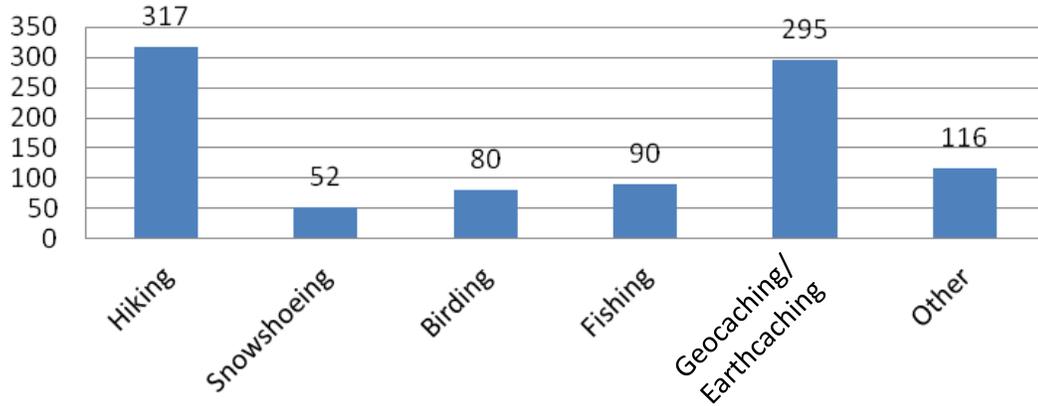




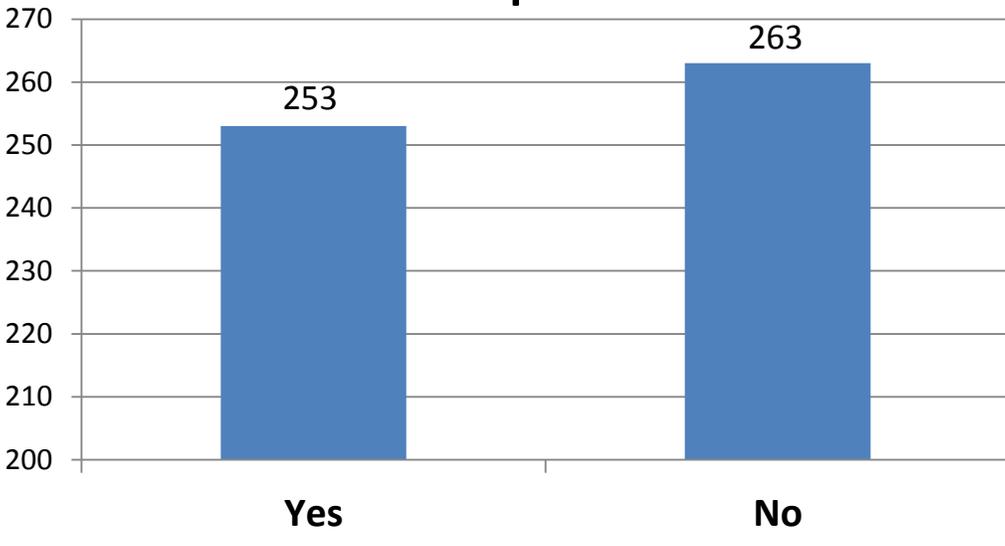
How many times have you used this trail in the past 12 months?

-Average of 10.26 times

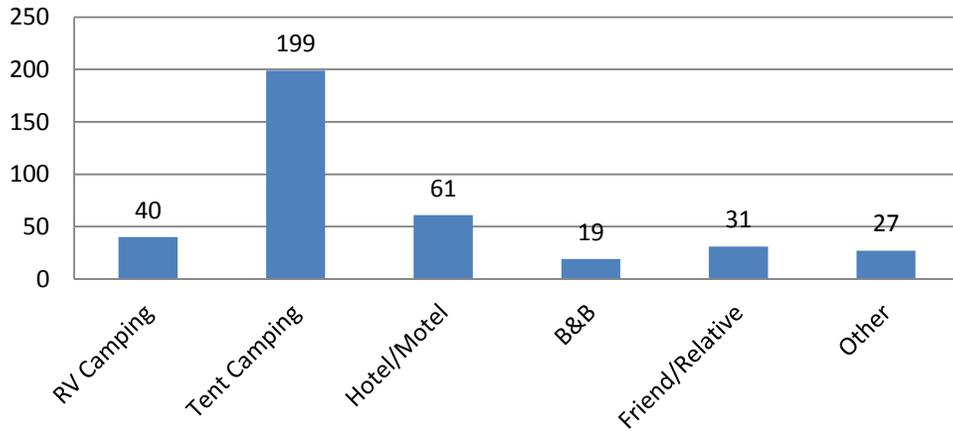
6. What activities have you participated in or plan to participate in on this trail?



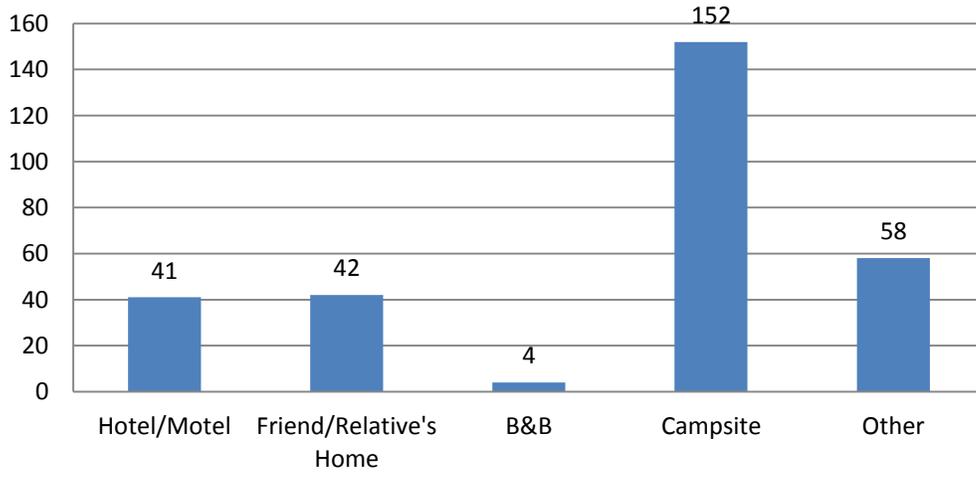
7. Are you staying overnight on this trip?

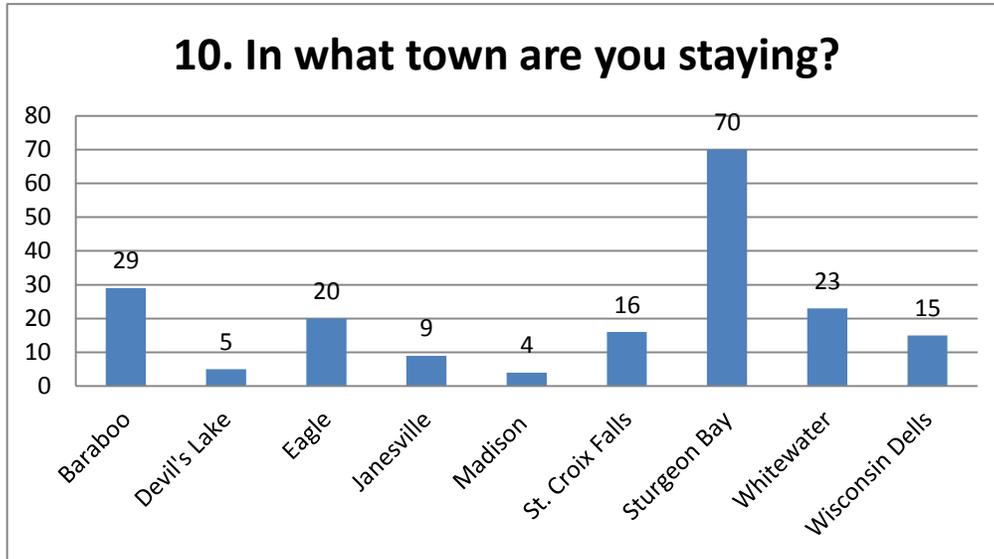


8. If you were staying on the trail, which form of lodging would you use?



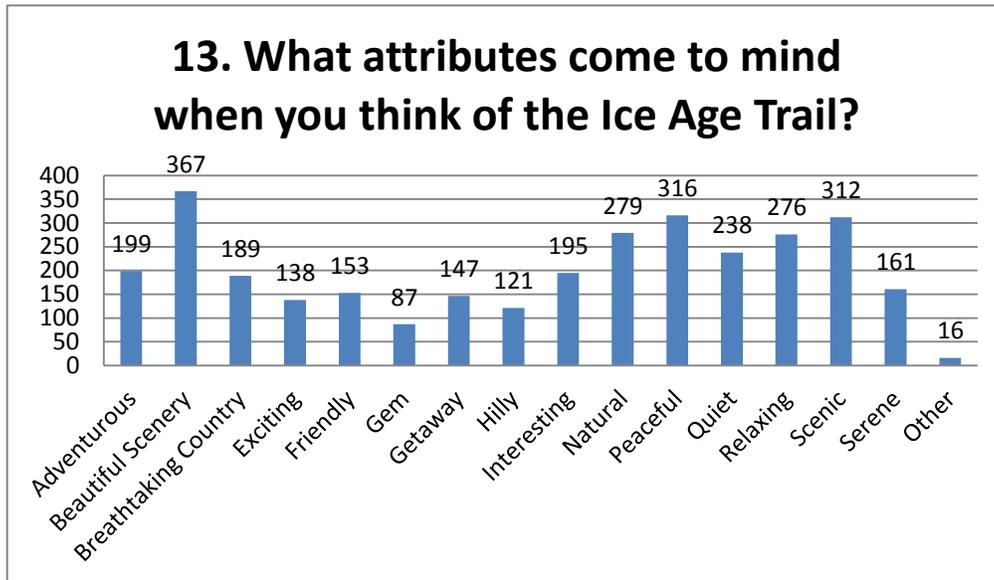
9. What type of lodging are you staying in?

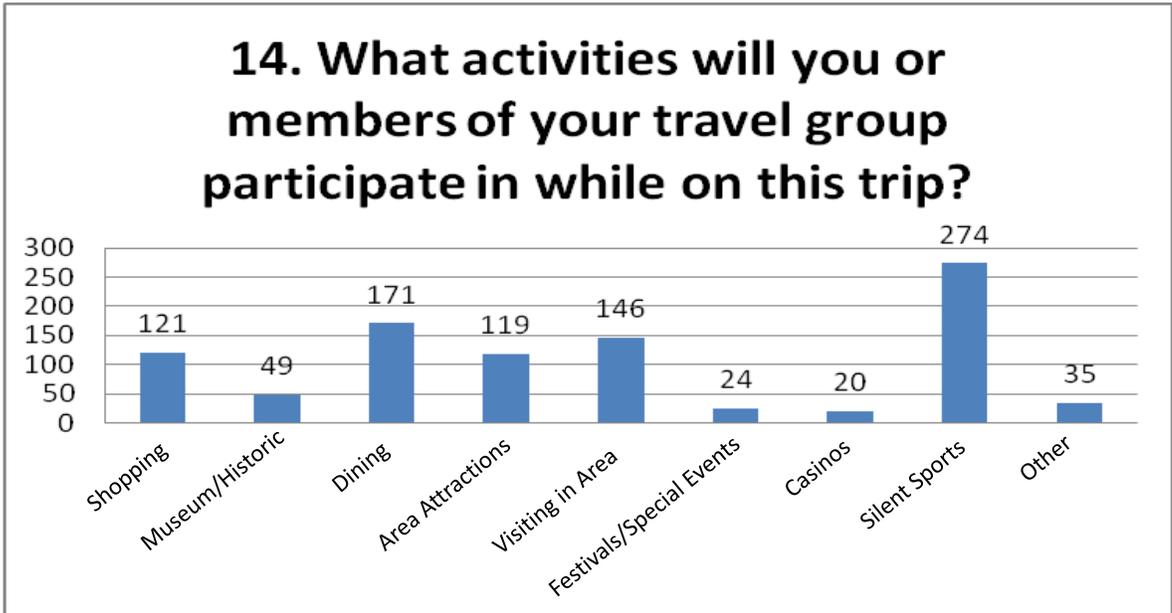




How many nights are you staying?

-Average of 2.88 nights

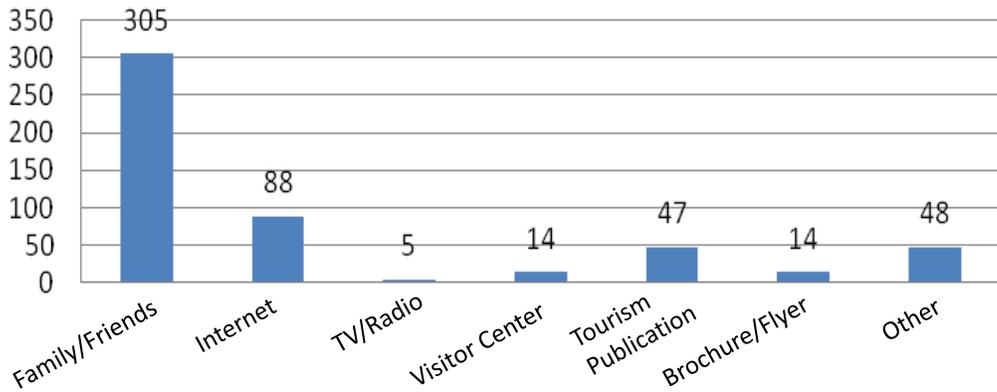




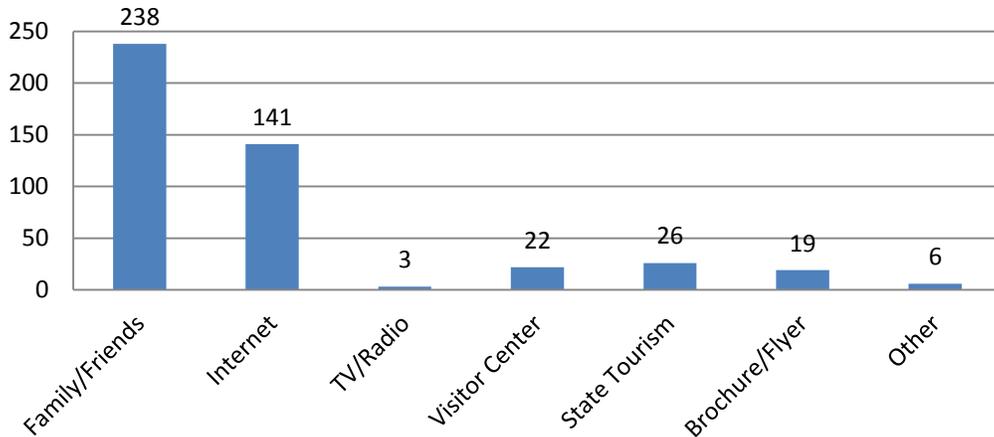
Please estimate how much you have spent or plan to spend in total on this trip in each of these categories:

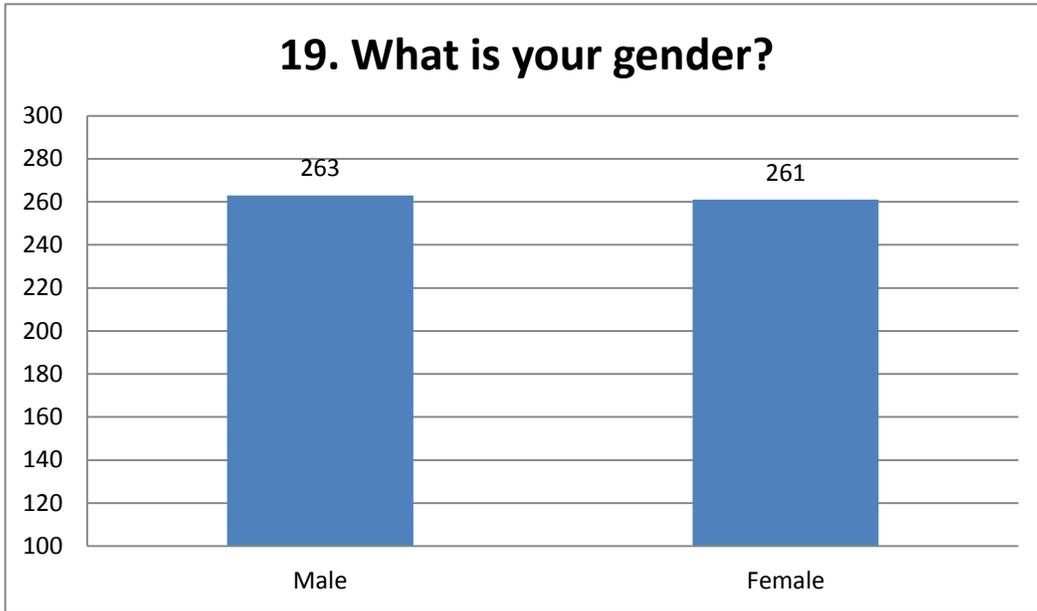
| | |
|----------------------|--------|
| Lodging | 26.09% |
| Food/Drink | 21.08% |
| Entertainment | 5.29% |
| Grocery | 12.74% |
| Shopping | 7.68% |
| Gaming | 3.74% |
| Gas/Travel | 20.29% |
| Other | 3.08% |

16. How did you find out about this trail?



17. How did you find information about the facilities?



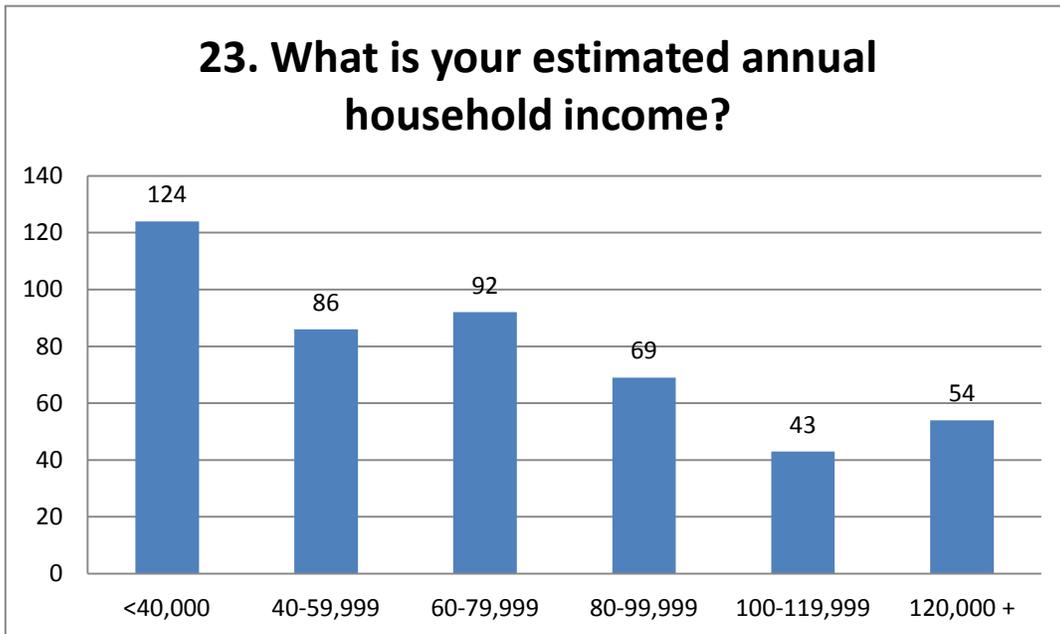
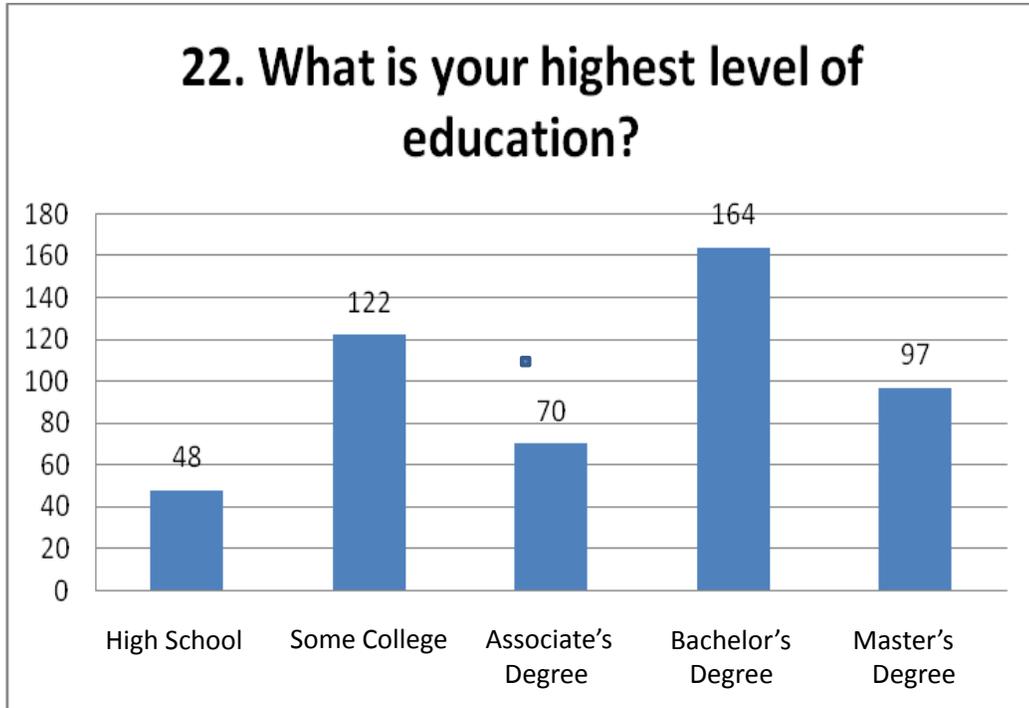


What is your age?

-Average Age: 38.02 years

How many people are traveling in your party?

-Average: 4.86



PROFILE OF ICE AGE TRAIL USERS

From the 554 responses in the trail user field survey, the demographics of the Trail user are as follows:

Household income:

| | |
|---------------------|---------------|
| Under \$40,000 | 26.5 % |
| \$60,000-\$79,999 | 19.7 % |
| \$40,000-\$59,999 | 18.4 % |
| \$80,000-\$99,999 | 14.7 % |
| \$120,000+ | 11.5 % |
| \$100,000-\$119,999 | 9.2 % |

Highest level of education:

| | |
|--------------------|---------------|
| Bachelor's Degree | 32.6 % |
| Some College | 24.4 % |
| Master's Degree | 19.4 % |
| Associate's Degree | 14.0 % |
| High School | 9.6 % |

Primary reasons for trip to the area?

| | |
|--------------|---------------|
| Trail | 30.2 % |
| Leisure trip | 22.4 % |

| | |
|-------------------------------|---------------|
| Outdoors | 16.5 % |
| Live in area | 11.4 % |
| Nature activities | 10.8 % |
| Special event/festival | 3.8 % |
| Business | 2.3 % |

How are users using the Trail?

| | |
|--------------------------------|---------------|
| Enjoying nature | 28.9 % |
| Hiking | 15.9 % |
| Exercise/Wellness/Fitness | 15.8 % |
| Camping | 9.7 % |
| Silent sports | 7.8 % |
| Observing geographic landscape | 7.3 % |
| Trail running | 4.3 % |
| Dog walking | 4.3 % |
| Special events | 2.0 % |

What activities is the user participating or plans to participate in on the trail?

| | |
|-------------------------|---------------|
| Hiking | 33.4 % |
| Geocaching/Earthcaching | 31.1 % |
| Other | 12.2 % |
| Fishing | 9.5 % |
| Birding | 8.4 % |
| Snowshoeing | 5.5 % |

Information about the trail users:

| | |
|---|----------------|
| Users were males | 50.9 % |
| Users were females | 49.9 % |
| Average age of users | 38.02 % |
| Average number of people in the user party | 4.86 |
| Were repeat Ice Age Trail users | 92.9 % |
| Average number of times repeat users use the Trail per year | 10.26 |

Overnight stays on this trip?

| | |
|---|---------------|
| Were staying overnight on this trip | 51.0 % |
| Were not staying overnight on this trip | 49.0 % |

Trail users indicated type of lodging used for overnight stays:

| | |
|-------------------|---------------|
| Tent camping | 52.3 % |
| Hotel/Motel | 16.2 % |
| RV camping | 10.6 % |
| Friends/Relatives | 8.2 % |
| Other | 7.2 % |
| B&B | 5.0 % |

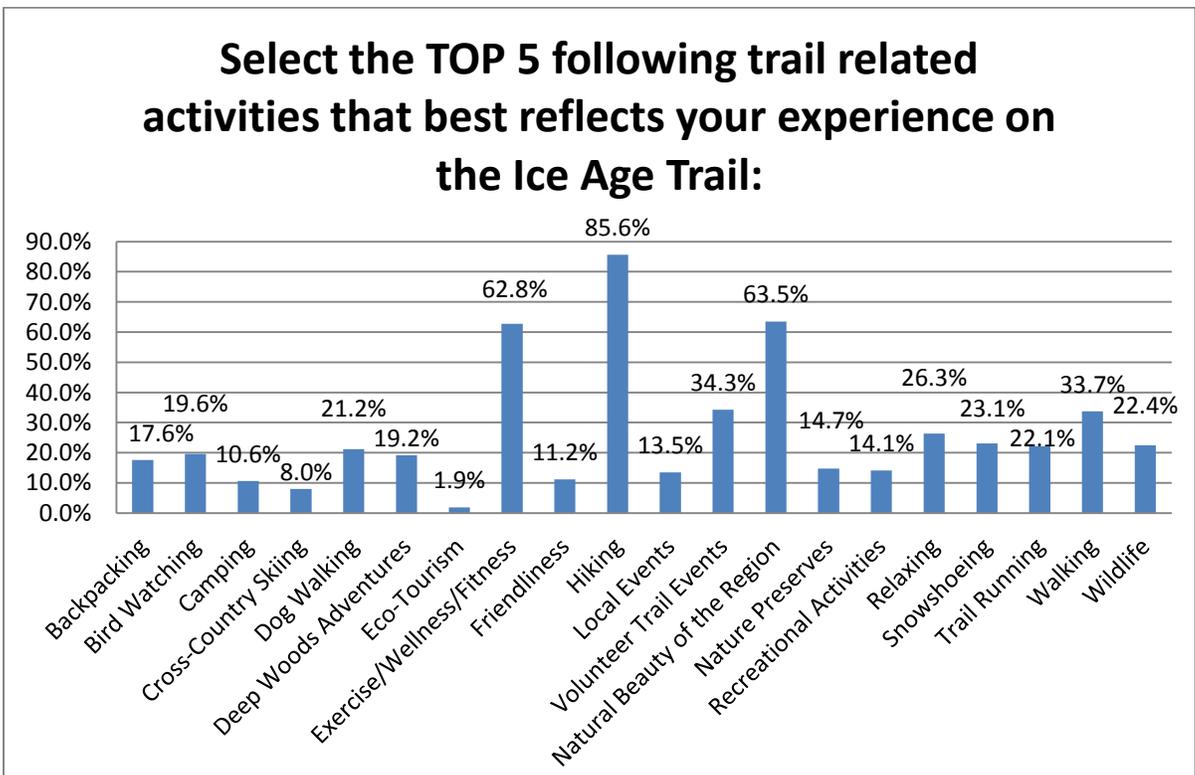
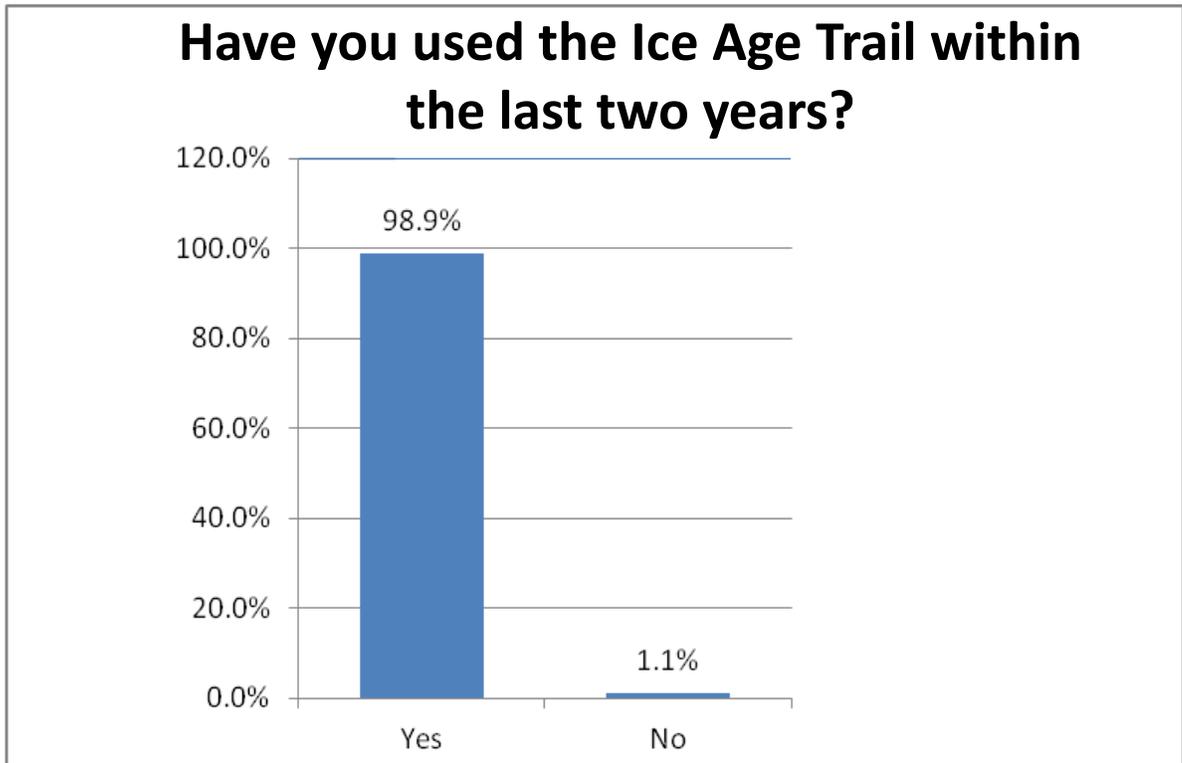
How many nights are visitors staying?

The average overnight stay is **2.88 nights**.

Trail user spending by category:

| | |
|---------------|----------------|
| Lodging | 26.09 % |
| Food/Drink | 26.08 % |
| Gas/Travel | 20.29 % |
| Grocery | 12.75 % |
| Shopping | 7.68 % |
| Entertainment | 5.29 % |
| Gaming | 3.74 % |
| Other | 3.08 % |

Online Survey Questions and Responses (n=356)



Describe your favorite activities along the Ice Age Trail:

Animals Backpacking Beauty Birding Camping Colors
Enjoying Family Geocaching Hiking Life Miles on the IAT Mobile
Skills Nature Outside Photography Plants Scenery
Snow Snowshoeing Taking Trail Walking Woods

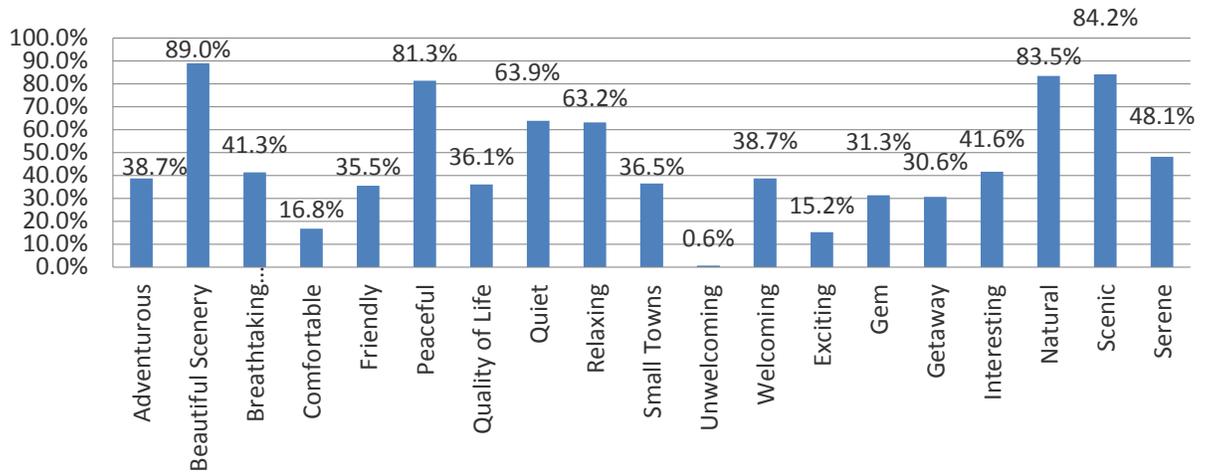
What is the one thing about the Ice Age Trail that is the most memorable to you?

Able Accessible Adventure Beauty Changing Seasons Enjoy Friends
Geology Hiking Kettle Moraine Lake Landscapes
Love Morning Natural Quiet Rugged Scenery Scenic Views
Seeing Segments Solitude Terrain Trail Variety
Volunteers Wildlife Woods

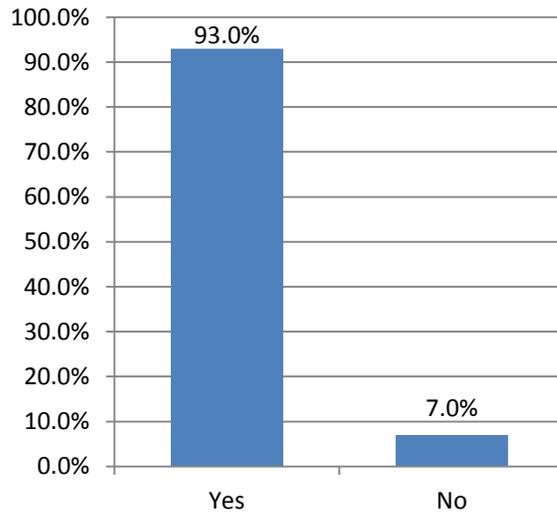
Please fill in the blank for the following statement: If only the Ice Age Trail had _____, I would plan an outing there:

Answer Backpacking Bathrooms Camping
Campsites Closer Fewer Hikers Hikes Hunting Longer
Continuous Maps Miles Mountain Biking Overnight Parking Areas Picnic
Plan Outings Restrooms Road Sections
Segments Shelters Single Track Trail Trailheads

What attributes come to mind when you think of the Ice Age Trail?



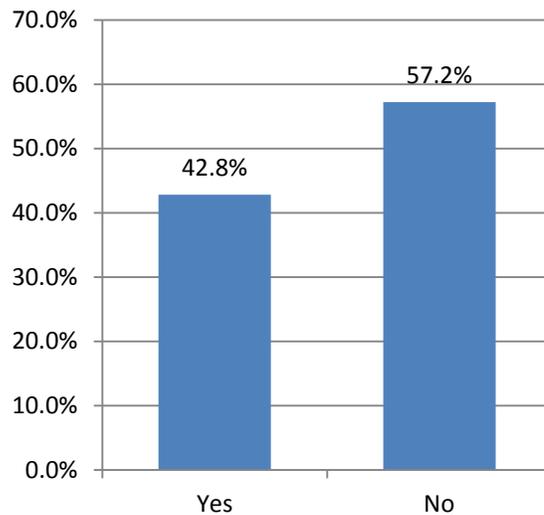
Do you remembering seeing any information for the Ice Age Trail either in print or online?

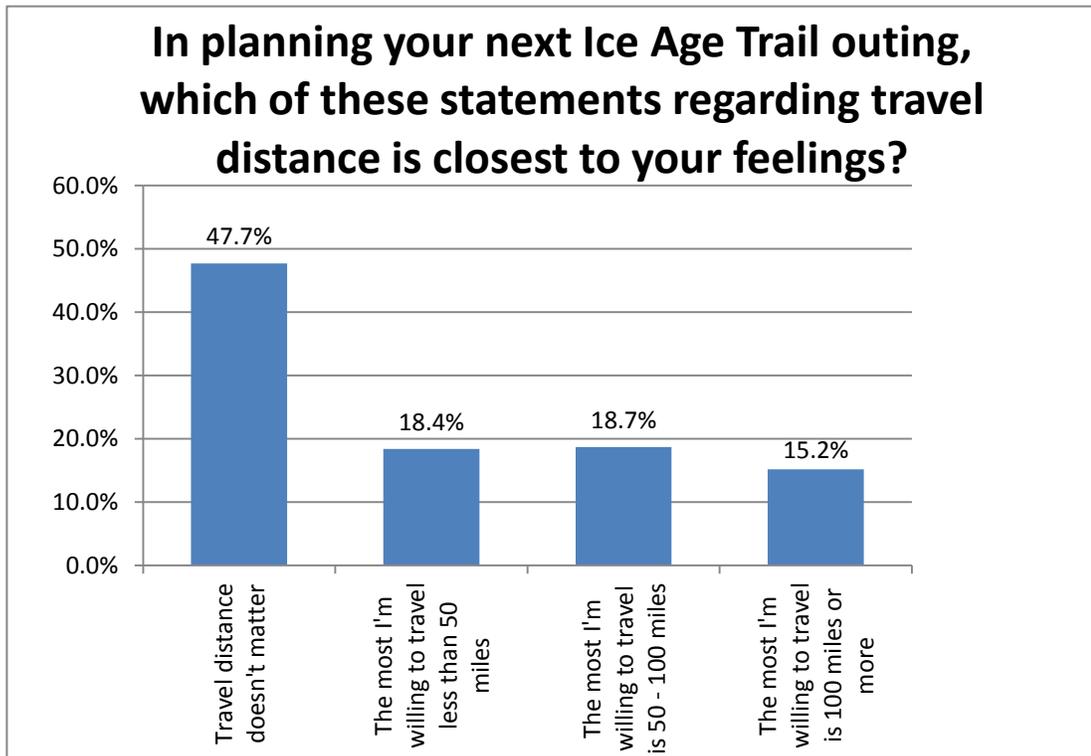
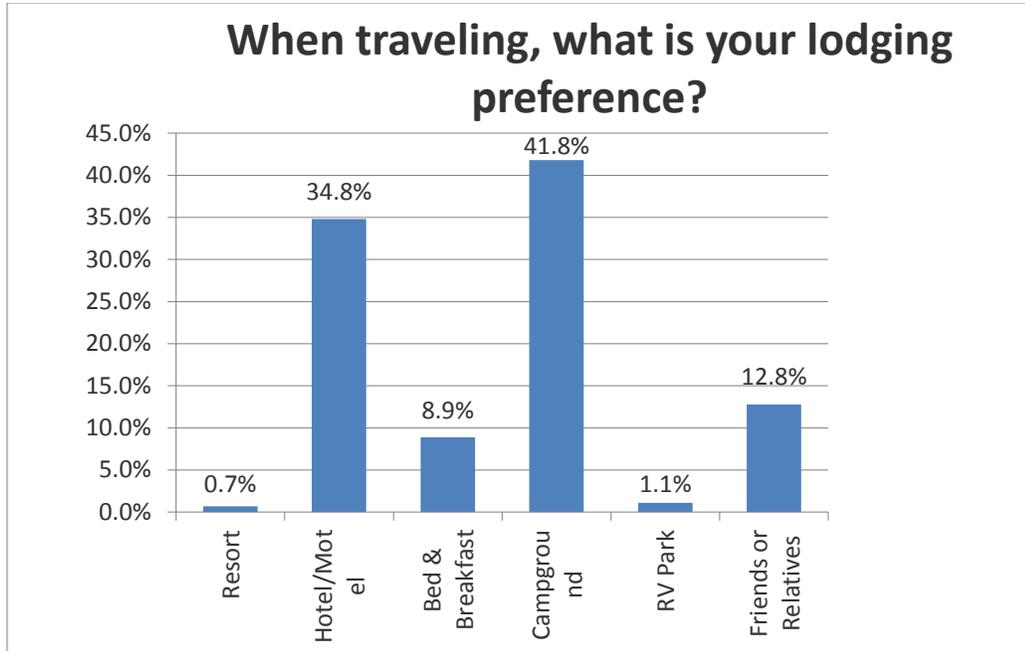


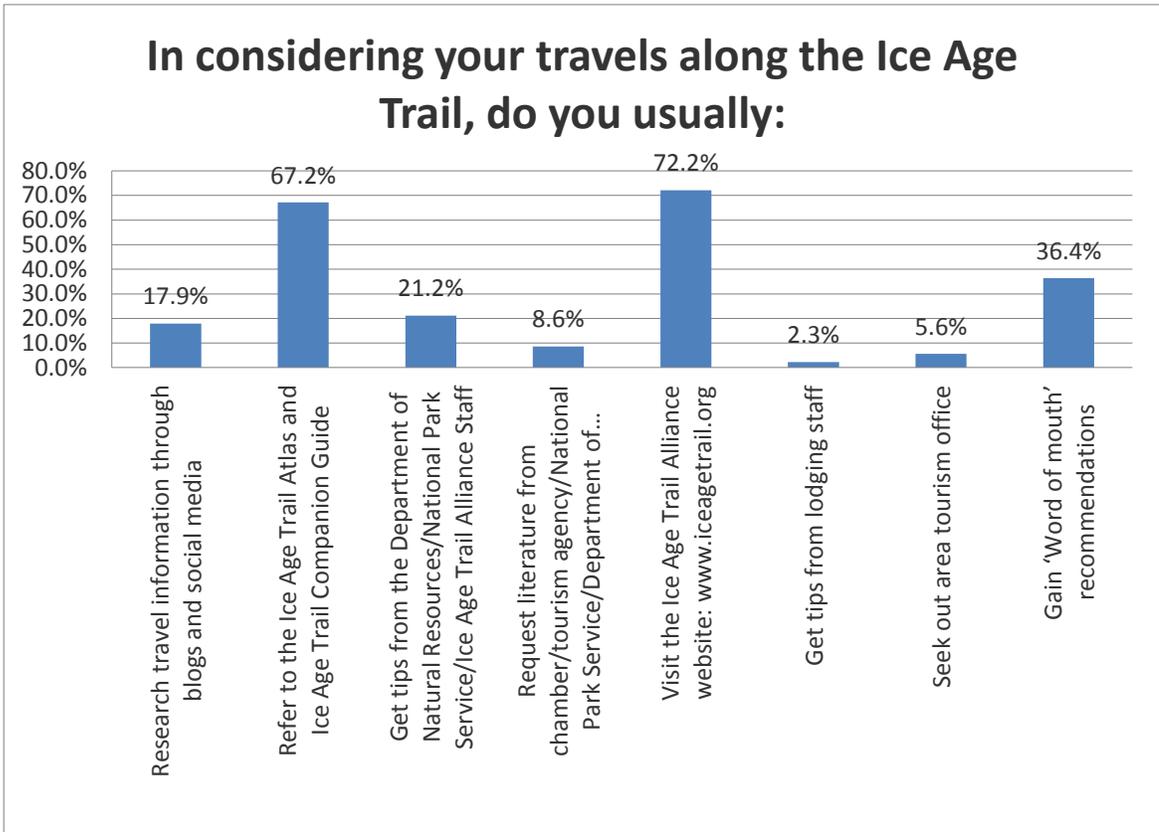
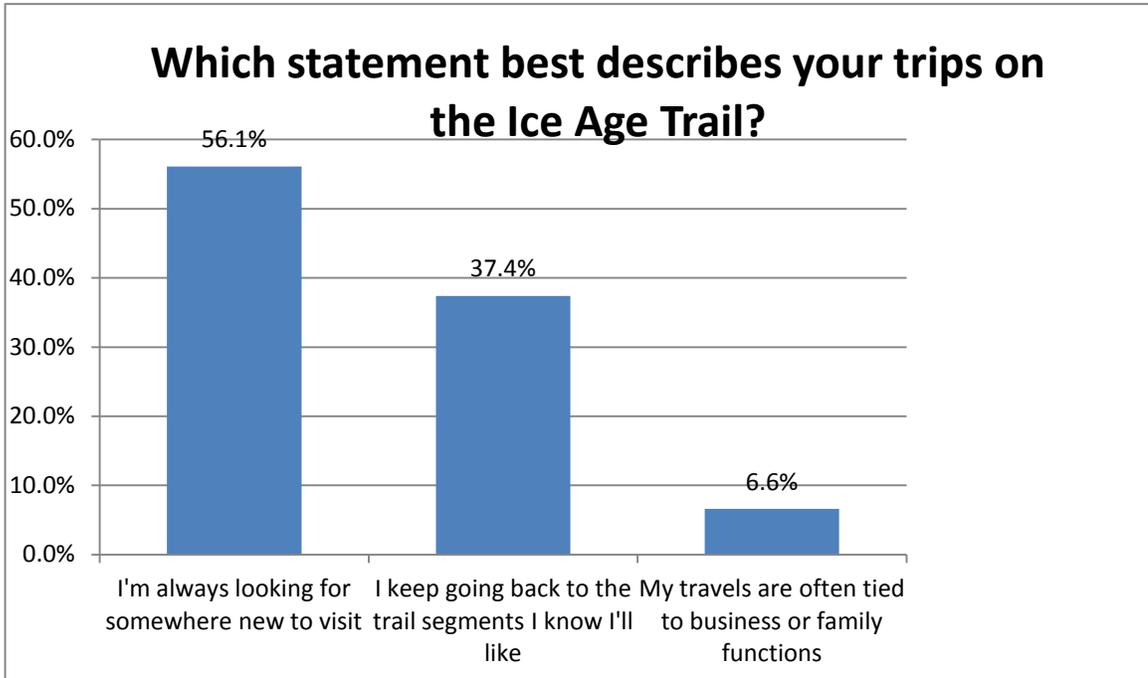
Where did you see the information?

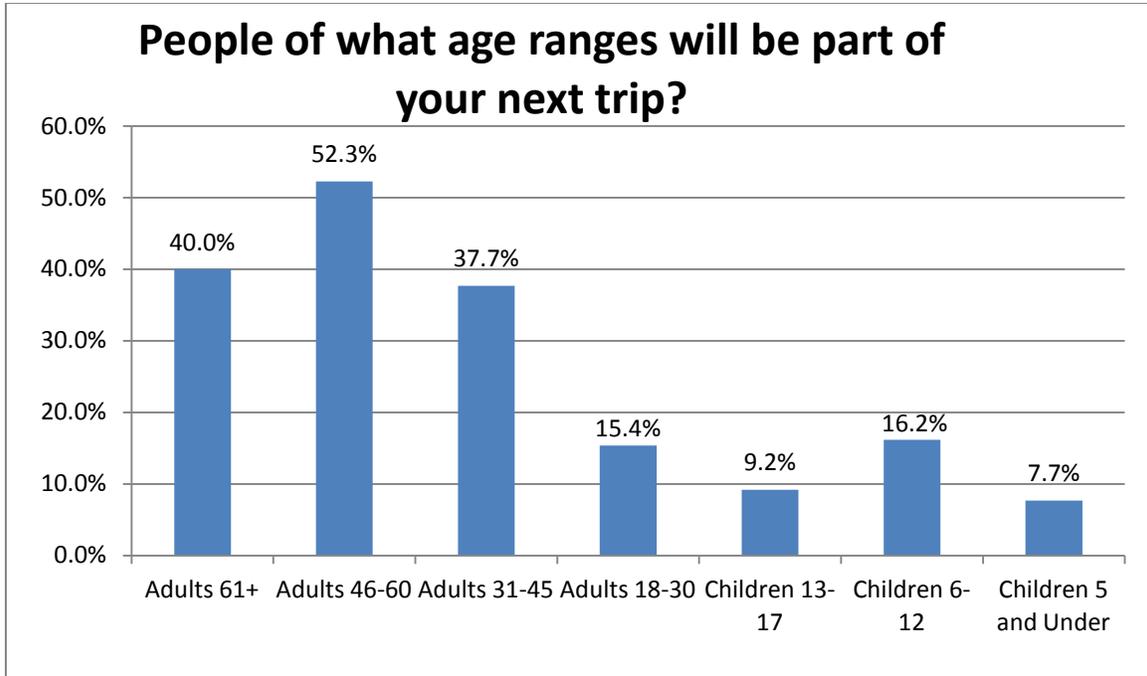
Books Canoeopia Community Cross Plains DNR E-mails Email
IAT IATA Internet Journal Leader Line Luck
Magazine Mail Meetings Moraine state Forest News
Newspaper On-line Park Polk County REI Saw
Trail Visitors Center

Are you planning an extended trip on the Ice Age Trail within the next year?







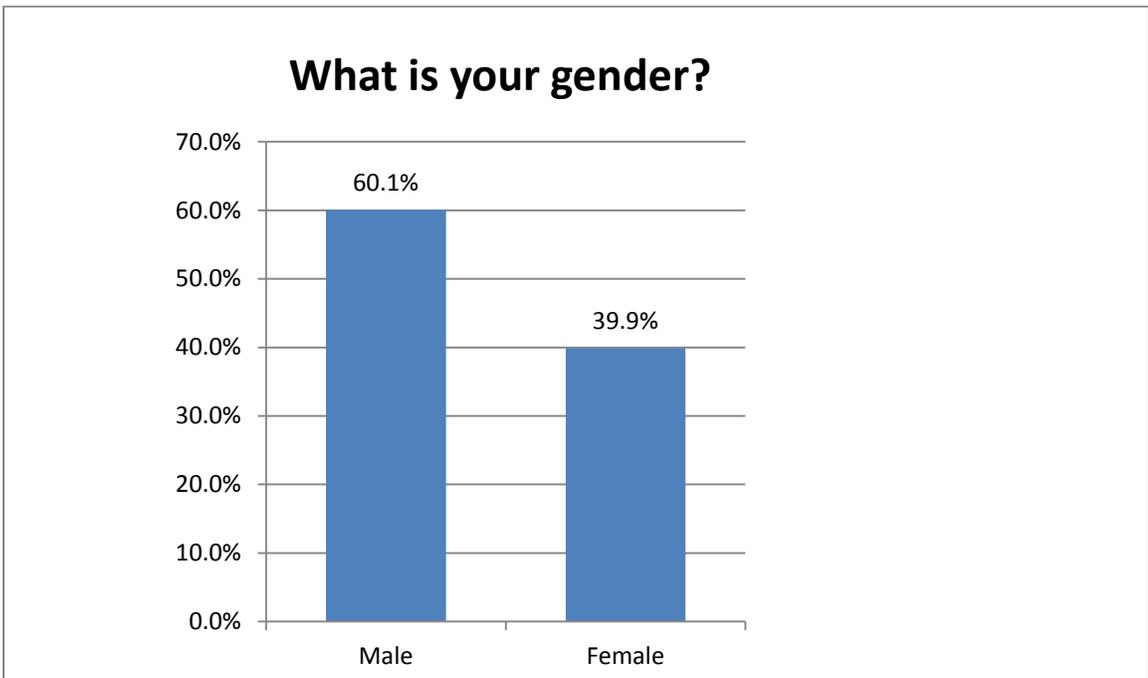
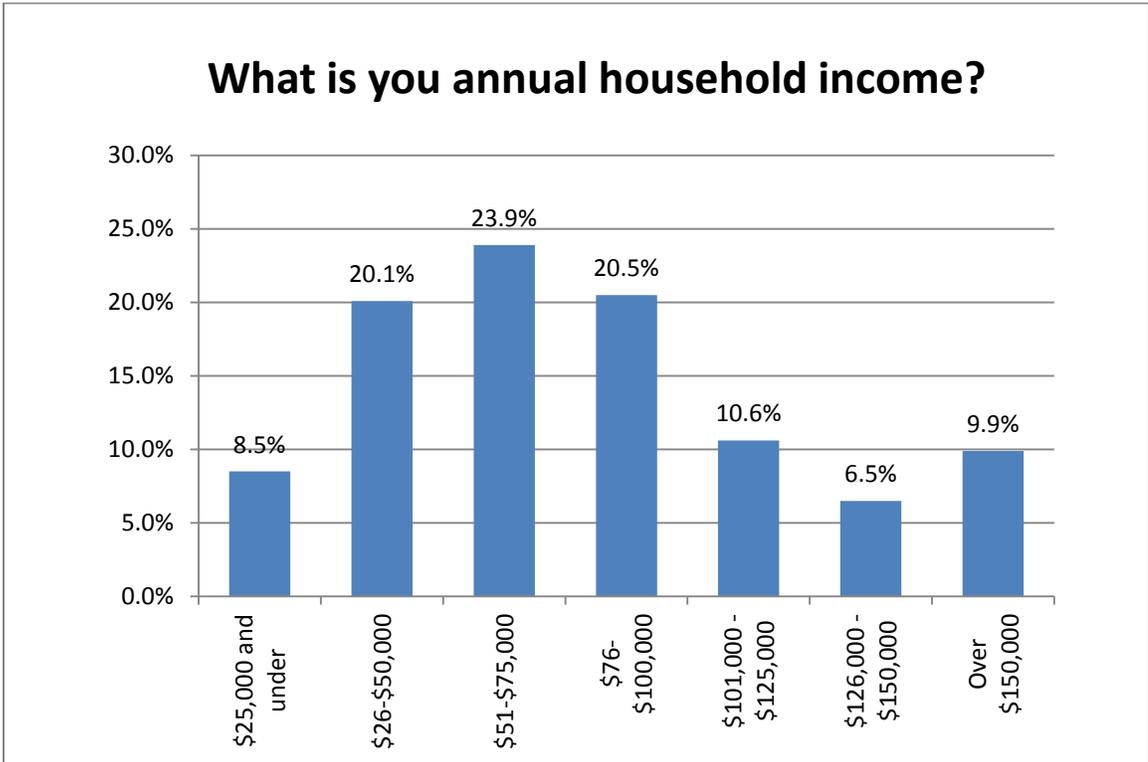


How long will this trip be?

- Average Days: 6.09
- Average night 3.64

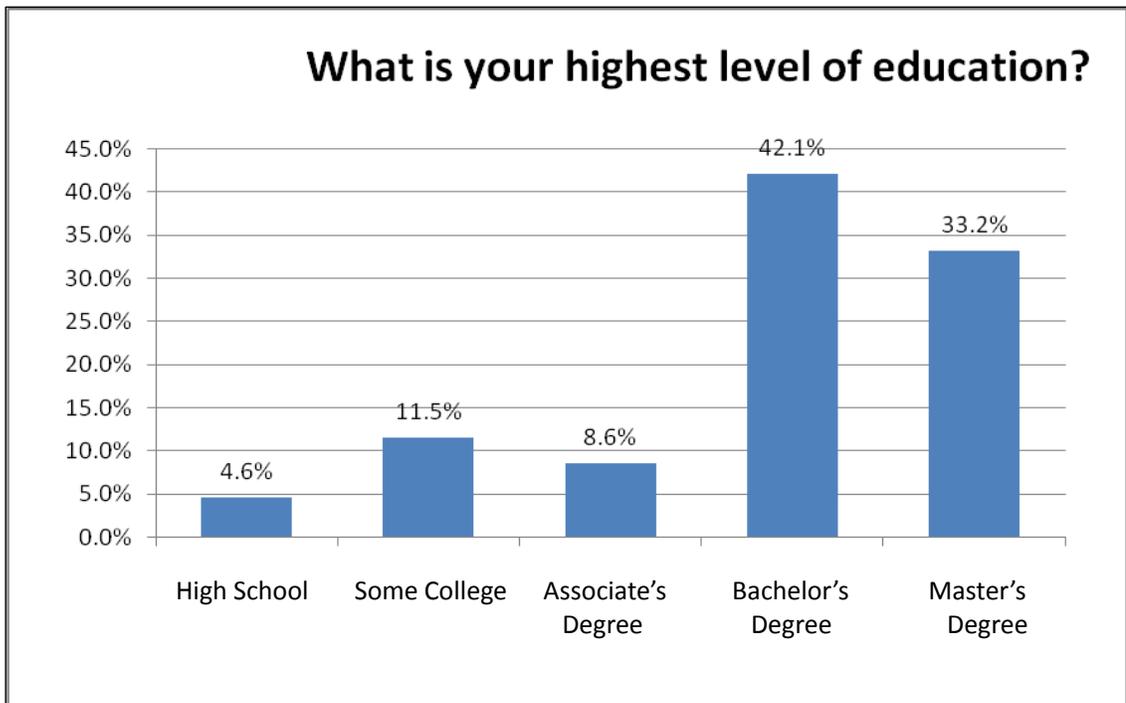
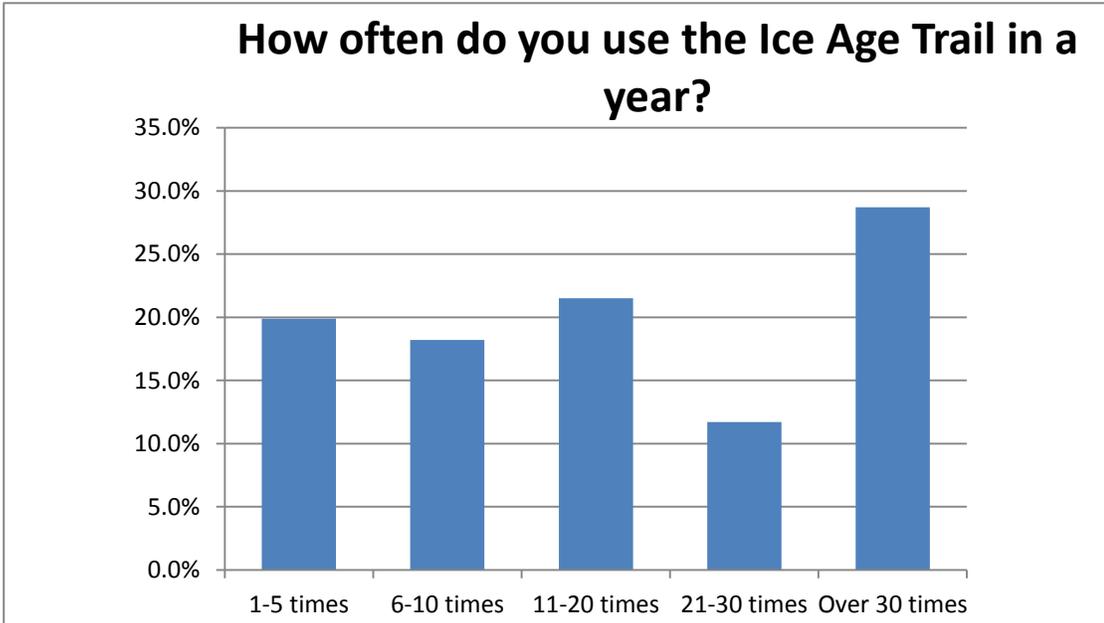
How long do you plan on staying along the Ice Age Trail?

- Average Days 6.04
- Average Nights 4.25

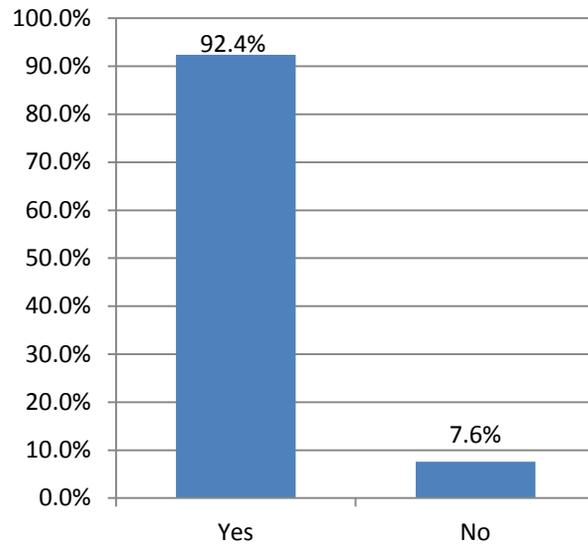


What is your age?

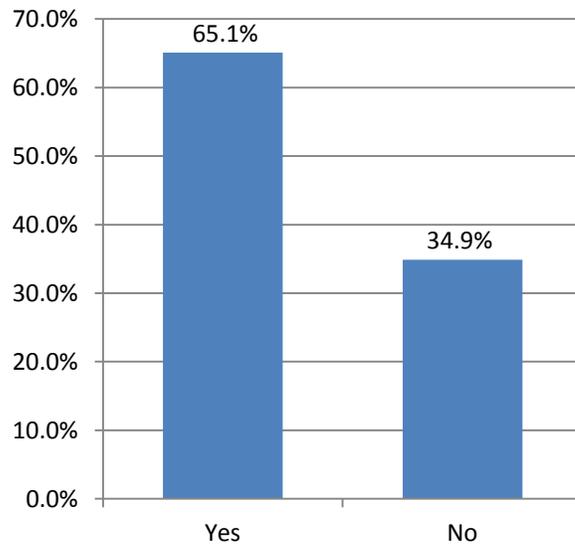
- Average Age: 51.49



Are you a Wisconsin resident?



Are you a member of the Ice Age Trail Alliance?



PROFILE OF THE ICE AGE TRAIL ONLINE DATABASE RESPONDENTS

From the 356 online survey responses which included IATA members, volunteers, trail users and other interested parties, the following information was obtained:

| | |
|---|---------------|
| Have used the Ice Age Trail within the last two years | 98.9 % |
| Is always looking for somewhere new to visit | 56.1 % |
| Are planning an extended trip on the Ice Age Trail within the next year | 42.8 % |
| Keeps going back to the trail segments they know they like | 37.4 % |
| Travels are often tied to business or family functions | 6.6 % |

In considering your travels along the Ice Age Trail, you usually:

| | |
|--|---------------|
| Visit the IATA website | 72.2 % |
| Refer to the <i>IAT Atlas</i> and <i>IAT Companion Guide</i> | 67.2 % |
| Get ‘word of mouth’ recommendations | 36.4 % |
| Get tips from DNR/NPS/IATA staff | 21.2 % |
| Use blogs and social media | 17.9 % |
| Request literature from chamber/tourism agency/NPS/ etc. | 8.6 % |

| | |
|-------------------------------------|--------------|
| Seek out area tourism office | 5.6 % |
| Get tips from lodging staff | 2.3 % |

Their preferred lodging when traveling is:

| | |
|-----------------------------|---------------|
| Campground | 41.9 % |
| Hotel/Motel | 34.8 % |
| Friends or Relatives | 12.8 % |
| B&B | 8.9 % |
| RV Park | 1.1 % |
| Resort | 0.7 % |

In planning their next Ice Age Trail, these are the statements regarding travel distances:

| | |
|---|---------------|
| Travel distance doesn't matter | 47.7 % |
| The most I'm willing to travel is between 50 and 100 miles | 18.7 % |
| The most I'm willing to travel is less than 50 miles | 18.4 % |
| The most I'm willing to travel is 100 miles or more | 15.2 % |

Miscellaneous information about online survey respondents:

| | |
|---|---------------|
| Average age of users | 51.49 |
| Users were males | 60.1 % |
| Users were females | 39.9 % |
| Average length of trip in number of days | 6.09 |
| Average length of trip in number of nights | 3.64 |

About the online survey respondents:

| | |
|---|---------------|
| Members of the Ice Age Trail Alliance | 65.1 % |
| Volunteered at an IATA event | 53.1 % |
| A Wisconsin resident | 92.4 % |
| Remembers seeing information for the Ice Age Trail either in print or online | 93.0 % |

The attributes that come to mind when they think of the Ice Age Trail:

| | |
|--------------------------|---------------|
| Beautiful scenery | 89.0 % |
| Scenic | 84.2 % |
| Natural | 83.5 % |
| Peaceful | 81.3 % |

| | |
|---------------------|---------------|
| Quiet | 63.9 % |
| Relaxing | 63.2 % |
| Serene | 48.1 % |
| Interesting | 41.6 % |
| Breathtaking | 41.3 % |

People of each age range taking part in the next trip to the IAT:

| | |
|------------------------------|---------------|
| Adults: 46-50 | 52.3 % |
| Adults: 61+ | 40.0 % |
| Adults: 31-45 | 37.7 % |
| Adults: 18-30 | 15.4 % |
| Children: 6-12 | 16.2 % |
| Children: 13-17 | 9.2 % |
| Children: 5 and under | 7.7 % |

How often do they use the IAT in a year:

| | |
|----------------------|---------------|
| Over 30 times | 28.0 % |
| 11-20 times | 21.5 % |
| 1-5 times | 20.0 % |
| 6-10 times | 18.5 % |
| 21-30 times | 12.0 % |

The annual household income for this group:

| | |
|----------------------------|---------------|
| \$51,000-\$75,000 | 23.9 % |
| \$76,000-\$100,000 | 20.5 % |
| \$26,000-\$50,000 | 20.1 % |
| \$101,000-\$125,000 | 10.6 % |
| Over \$150,000 | 9.9 % |
| \$25,000 and under | 8.5 % |
| \$126,000-\$150,000 | 6.5 % |

What is their highest level of education?

| | |
|----------------------------------|---------------|
| Bachelor's Degree | 42.1 % |
| Master's Degree or Higher | 33.2 % |
| Some college (no degree) | 11.5 % |
| Associate's Degree | 8.6 % |
| High School | 4.6 % |

QUANTITATIVE RESEARCH – MAIL SURVEY AND SILENT SPORTS SURVEY RESULTS

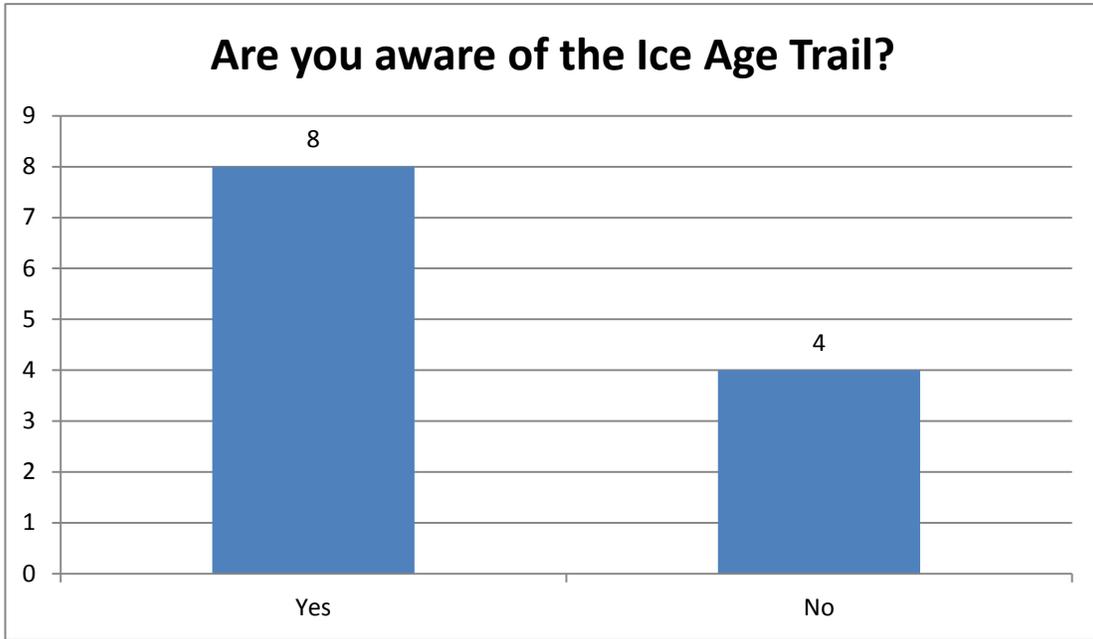
The two qualitative market research surveys (the field intercept survey and the online database survey) were followed by a quantitative market research survey conducted to gather data on tourism questions from current users, potential visitors and businesses within the State of Wisconsin. Throughout August and September of 2012, over 750 mail surveys were sent out to restaurants, hotels and convenience store owners and businesses within a 10-mile border of the Ice Age Trail. A response rate of 4% occurred probably due to the timing of the survey as it was in the late summer/early fall timeline which is the busiest time for vacationers. (See Appendix F for mail survey questionnaires)

Results of the Mail Survey to Convenience Stores, Hotels and Restaurant Owners:

Convenience Stores

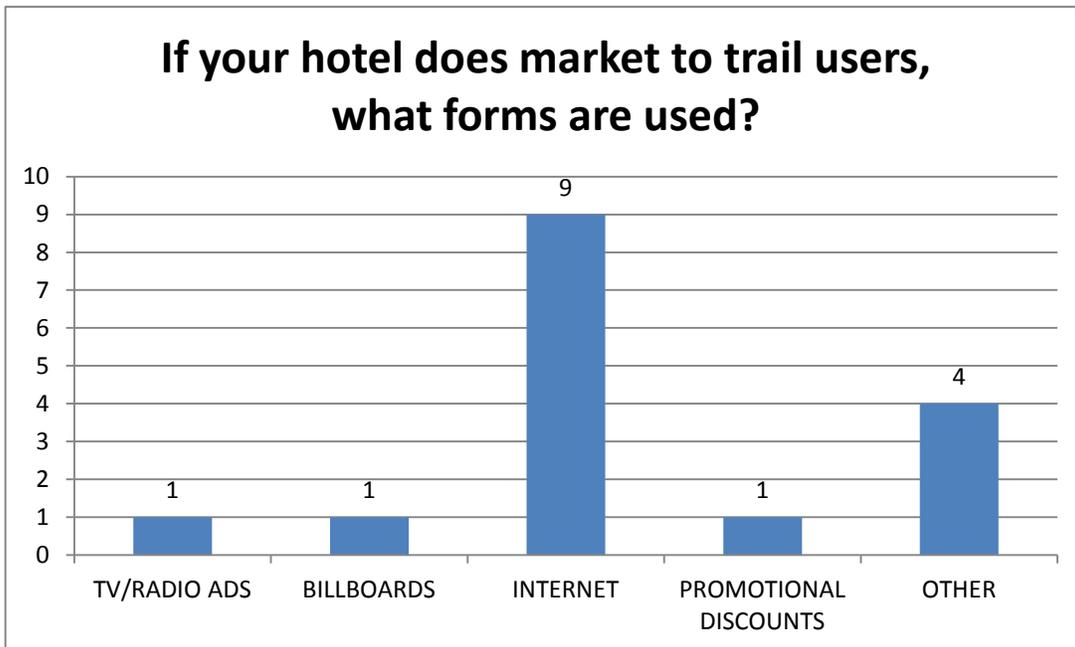
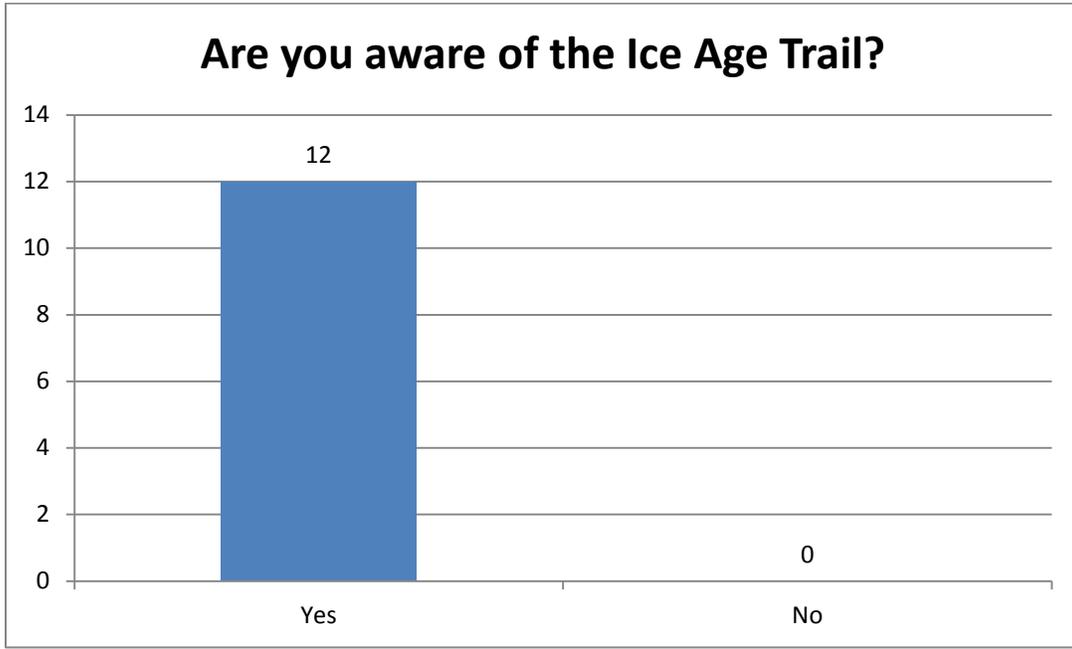
Average age of store: 17.52 years

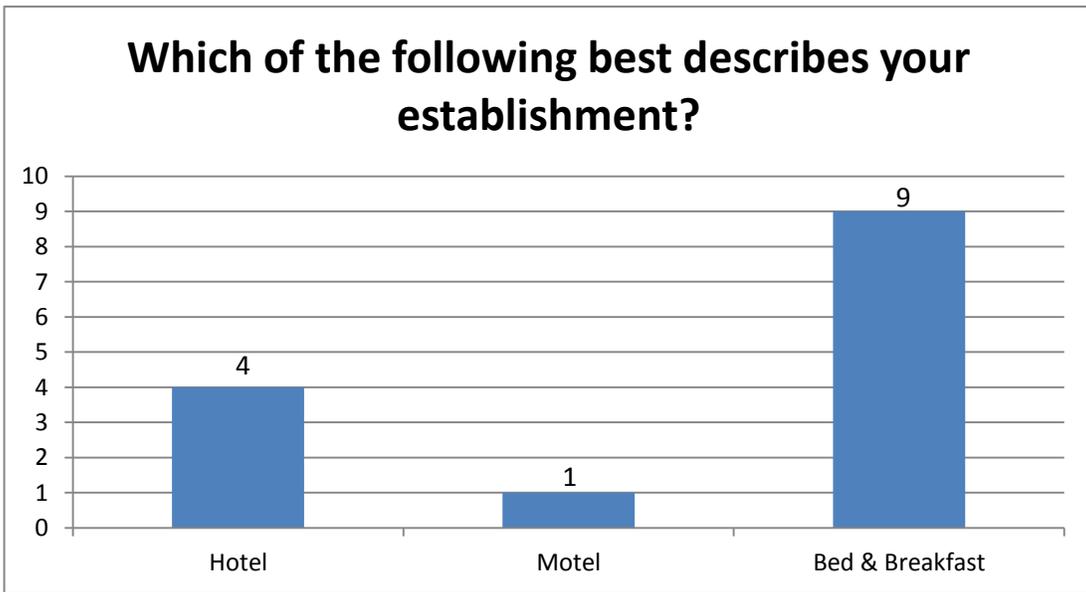




Hotels

Average age of the hotels: 20.25 years

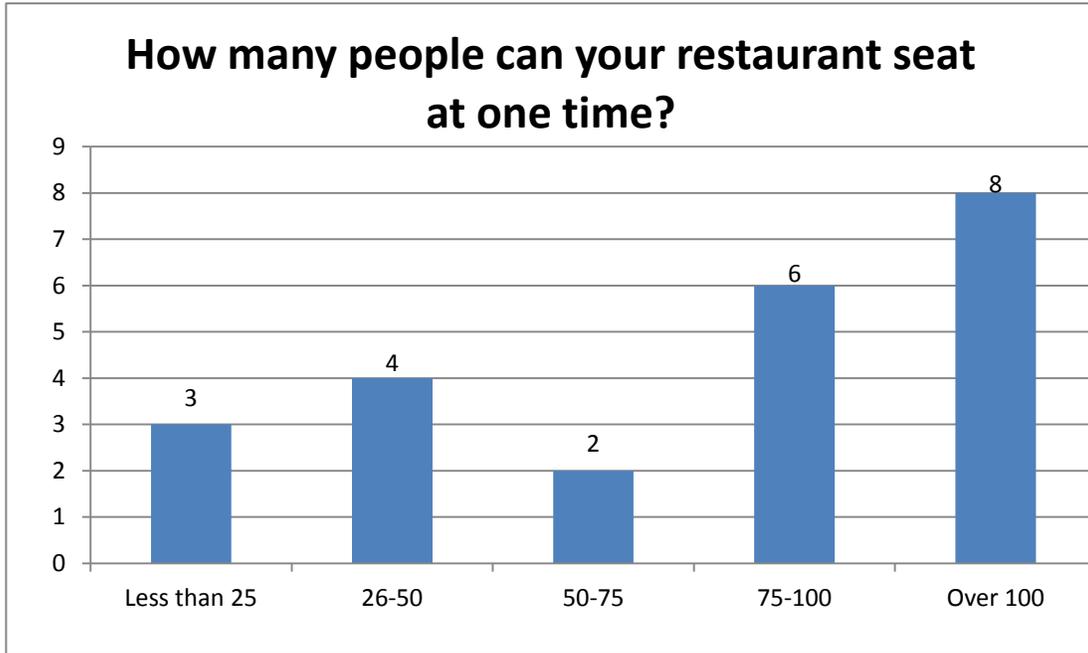


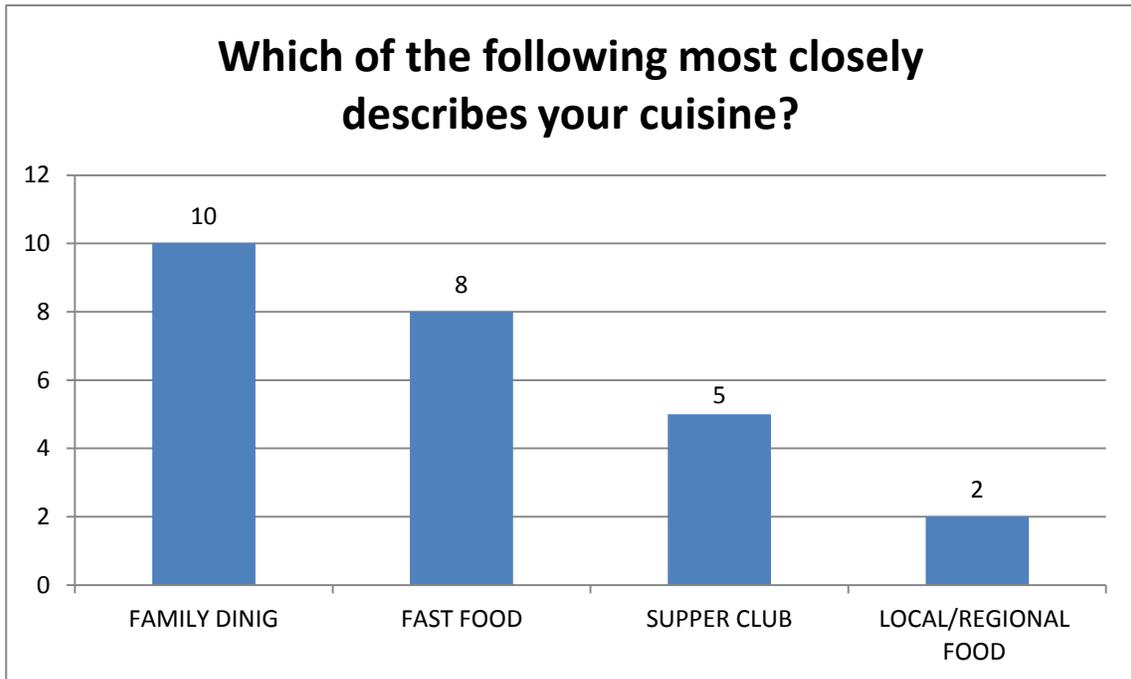
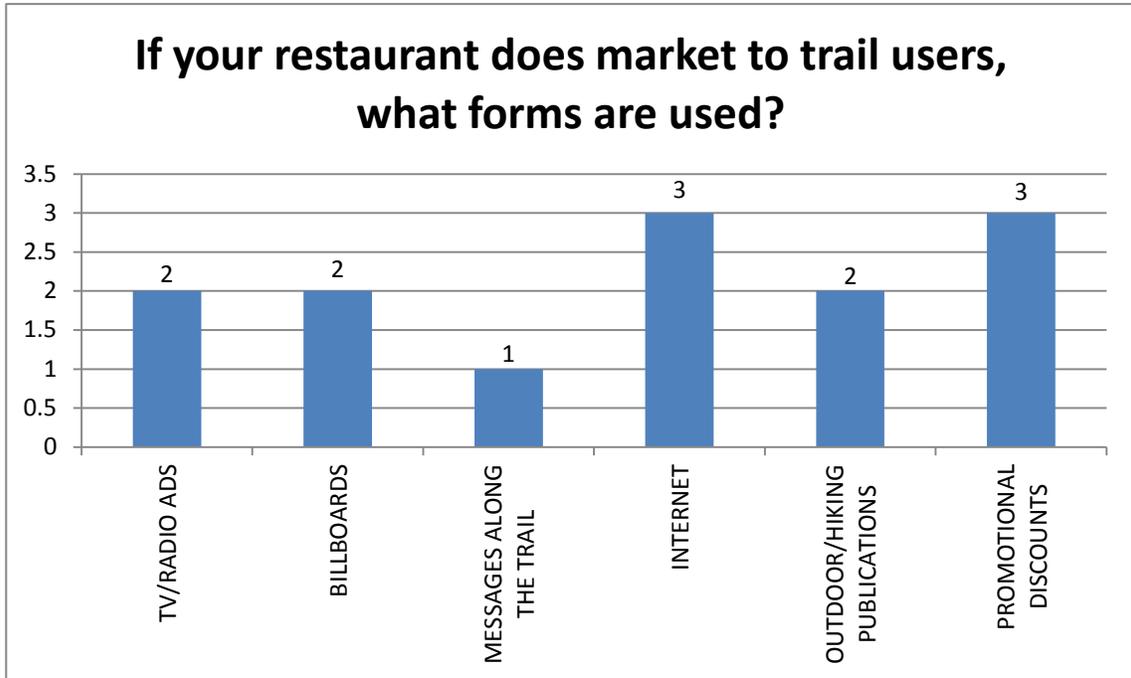


Restaurants

Average distance from the Trail: 1.55 miles

Average age of the restaurant: 22.74 years

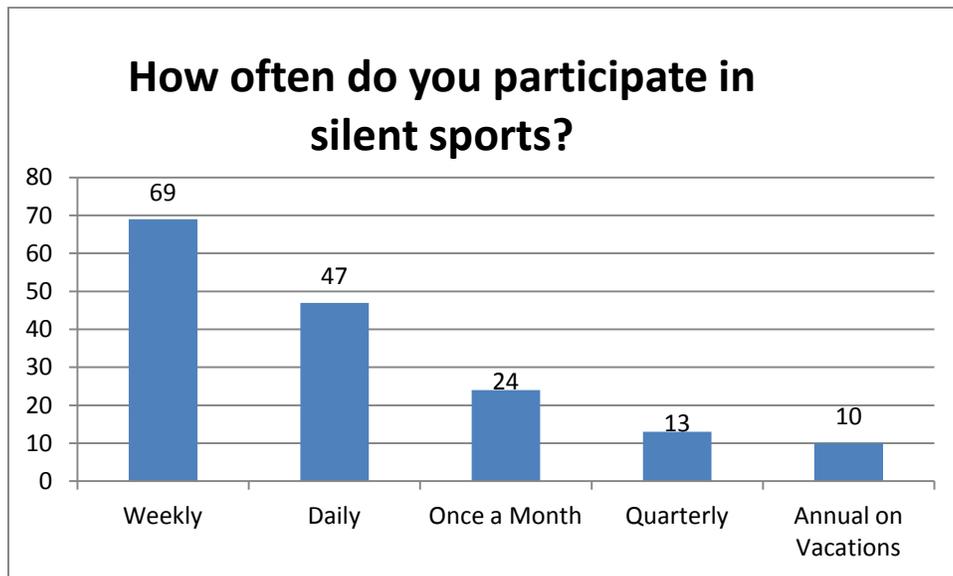




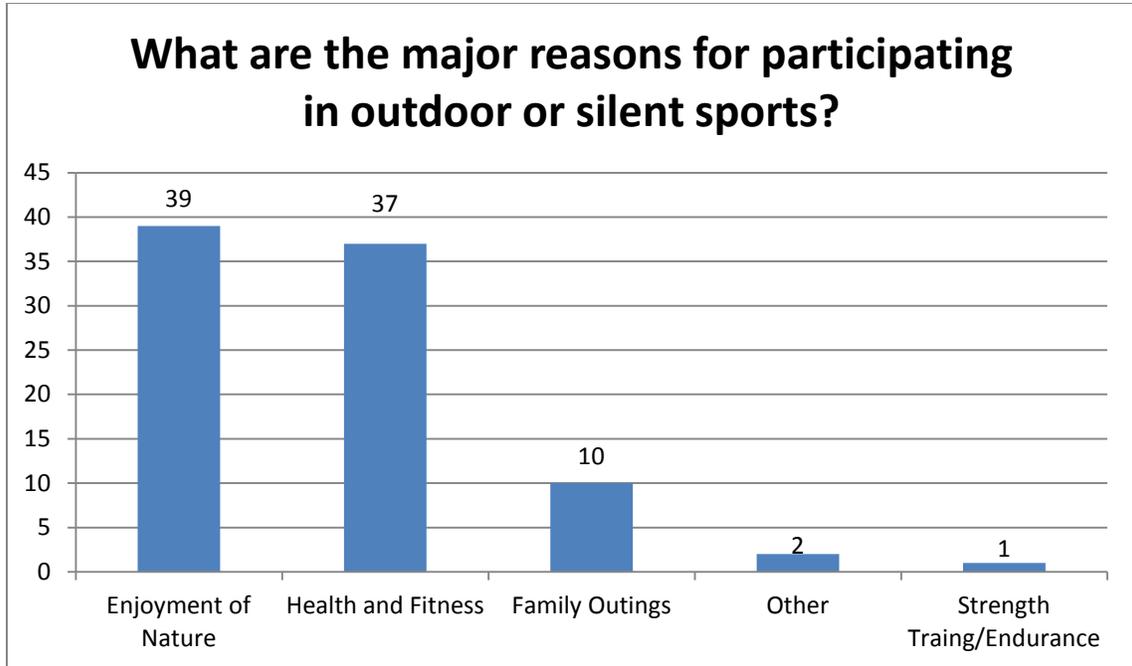
The Economic Impact of Silent Sports Survey Wisconsin, May 2011

Silent sports was the number one response to the Ice Age Trail field survey question (#14): *What activities will you or your travel group participate in while on this trip?* For this reason the 2011 Wisconsin Silent Sports Survey performed by the University of Wisconsin-Whitewater was reviewed for additional information. The following two graphs from this report can be of assistance in evaluating the importance of silent sports for the Ice Age Trail Alliance. (For the full results of the Silent Sports Survey, see Appendix G)

Silent Sports Survey



Participants all have different reasons for participating in silent sports. Some of the most common motivations are enjoyment of nature (23 percent), health and fitness (22 percent) and family outings (6 percent).



TARGET MARKET ANALYSIS

Based on the quantitative and qualitative market research conducted, Ice Age Trail Alliance programs, tourism activities, programs and attractions for the Ice Age Trail region should be centered on these targeted audience segments:

A. **Land-based Users** (hikers, trail runners, backpackers, cross-country skiers, snowshoeing, etc.)

More than 20 percent of the 93 million Americans who participate in hiking, backpacking, mountain climbing, and camping are enthusiasts who participate frequently. There are many sources of motivation for these active individuals, including social interaction, a sense of achievement, a connection with nature, an adventurous spirit, and a focus on exercise and health.

Hiking. There are almost 30 million hikers in America, of which 4.8 million are frequent participants. The distribution of participants among age groups is fairly even, with the highest percentage existing between the ages of 35 to 44 and with an average age of 38. Hikers are balanced between genders, as 55 percent are male and 45 percent are female. Just over half of all hikers are married and 34 percent have a household income above \$75,000.

Walking. One of the definitions of hiking is “walking.” Many recreational organizations have linked hiking and walking into one category because they are so similar in trails used and participant demographics.

Trail running. Regular aerobic exercise is a positive lifestyle choice and continuing growing trend for outdoor recreation activities. Trail running appeals to athletes and exercise enthusiasts of all abilities. From 5K runs before work to an endurance marathon, trail runners hit the Trail 365 days a year.

Geocaching/Earthcaching. Geocaching is a treasure hunting game using GPS-enabled devices. Participants navigate using GPS coordinates and attempt to find either a hidden item (geocache) or a particularly noteworthy geoscience feature (EarthCache). EarthCaches often have educational notes describing geologic processes, and the database is maintained by the Geological Society of America. EarthCaching further supports and encourages Leave No Trace ethics.

B. **Nature-based users** (walking, geology, wildlife, etc.)

Nature-based land activities are outdoor recreation activities that occur in undeveloped settings. While limited developed facilities may be used in conjunction with these activities, the typical nature-based land activity participant wants to experience natural surroundings. Visiting wilderness areas is the most popular nature-based land activity in Wisconsin with 38.3 percent of Wisconsinites participating. Hiking and camping are also popular with approximately one third of state residents participating in each.

C. Birding

Viewing and photographing birds are popular across activities all age groups and state regions—over 40 percent of Wisconsinites (1,700,000 people) participate in these activities. Bird watching is a uniquely serene pursuit—quiet, non-destructive. Many birdwatchers value the opportunity to be in the fields or woods, away from the noise and sometimes hectic pace of the city. Interestingly, most birdwatchers don't need to go far from home to find this peaceful atmosphere—85 percent bird watch within one mile of where they live. Other birdwatchers value the educational aspect of the activity, taking the time to search for new species and learn the different behaviors, calls, and appearances of different birds. Bird watching is often done as a family activity, making the sport a uniquely social way to spend time in nature. As the activity has become more popular, the state has begun to develop bird watching trails. These trails often feature driving routes with stopping points to observe birds and other wildlife and are expected to further increase the popularity of bird watching. Fifty-two percent of birders are over the age of 45 years-old; 46 percent are male and 54 percent are female.

Wisconsin is in the top three states for bird watching activities with an overall participation rate of 26 percent, behind Iowa (33 percent) and Minnesota (33 percent). Out of the 1,454,000 birders in the State of Wisconsin, 79 percent were state residents and 21 percent were from out of state. Forty-two percent of birders travel more than a mile from home to bird watch, visiting both private and public lands. Birders spend money on a variety of goods and services for trip-related and equipment-related purchases. Trip-related expenditures include food, lodging, transportation, and other incidental expenses. These direct expenditures are part of the economic impact of birding.

D. Eco-Tourists

Ecotourism is a form of tourism that involves visiting fragile, pristine, and relatively undisturbed natural areas intended as a low-impact and often small-scale alternative to standard commercial (mass) tourism. Its purpose may be to educate the traveler, to provide funds for ecological conservation, to directly benefit the economic development and political empowerment of local communities, or to foster respect for different cultures or human rights.

Generally, ecotourism focuses on socially responsible travel, personal growth, and environmental sustainability. Ecotourism typically involves travel to destinations where flora, fauna, and cultural heritage are the primary attractions. Tourists gain insight into the impact of human beings on the environment as eco-tourism fosters a greater appreciation of natural habitats.

OPTIMAL VISITOR EXPERIENCE

The optimal visitor experiences are those that are tailored for a specific audience. EDP evaluated the results of the trail and online IATA surveys and various other outdoor recreation

surveys to determine what would be the optimal visitor experience itineraries that the Ice Age Trail Alliance should develop to encourage the user/visitor to extend their stay within the trailway. The following itineraries are recommended for development in Year 2:

- Hiking/Trail
- Camping
- Birding
- Waterways and the experience of waterway connections (fishing/canoeing/etc.)
- Winter sports (cross-country skiing/snowshoeing/etc.)
- Other land sports
 - Geocaching/Earthcaching

These itineraries should be developed in collaboration with the IATA volunteer chapters and written in a form that would be easily transferable into various communication vehicles, such as maps, IATA's website, social media and other online media, brochures, etc.

Transforming the itineraries into a format easily used by Ice Age Trail visitors, Economic Development Partners has to determine what would be the best vehicle to communicate to its visitors the many diverse assets of the counties and communities that surround the Ice Age Trail. Although hiking is an obvious trail activity, the others may not be obvious, so the next phase of planning should concentrate on developing materials for these other target audiences.

The IATA itineraries should be formatted into a format that includes:

- ◆ Basic description of the activity (hiking, snowshoeing, camping) with associated icon within the IATA
- ◆ Basic safety practices of activity
- ◆ Links for more information related to the activity
- ◆ Maps of the numbered itineraries associated along the Trail
- ◆ Information about the community in which the activity is located
- ◆ Information about local attractions, activities, etc. associated with the specific activity (i.e., name of park, information about hours, etc.)
- ◆ List of ADA accessible activities and attractions, amenities, hours, etc. making it easy for trail users to plan their visit

BRANDING – ICE AGE TRAIL ALLIANCE

The current IATA brand was unearthed and revised based on the market research conducted. Celtic, Inc. of Brookfield developed the new Ice Age Trail Alliance Brand Manual, brand identity, positioning and tagline and has been responsible for all creative work and production of printed marketing materials. (For the full Brand Manual, see Appendix C)

IATA understands that a successful regional brand connects with its audience and strongly influences the travel decisions of the target audiences. The market research conducted illustrates visitors are seeking opportunities to explore regional areas that offer more than just a singular experience; they are looking for **transformative experiences**. Strong regional brands lead to additional visitors, sales and revenue the communities would otherwise never realize.

Branding is an investment in the region's future and an investment with a high return. All brand-building initiatives must be measurable and deliver tangible results. Once we know "why" we are in a smarter position to answer "how." Strategic planning and intelligent research gives us the ability to discover those triggers that impact visitor purchase decisions and achieve maximum return-on-investment. They can and will be measured by EDP through these metrics in Year 3:

1. **Name-brand awareness** for the Ice Age Trail – Branding can increase the perceived value of the products or services along the Trail and that translates into higher prices and margins. That difference is easily computed and is part of the calculations of the brand's valuation.
2. **Higher community valuation** – Visitors tend to value well-branded communities and regions higher than those with no brand. More brand exposure is a gain to be realized.
3. Increase in the number of new visitors
4. Increase in the number of repeat visitors
5. Increase in the dollars spent in the region
6. Increase in the number of days visitors spend in the region
7. Growth in regional business revenues and new jobs created
8. Increase in the number of employees involved in tourism for the region

EDP’s Recommendation: Implement the newly-revised Brand Platform for the Ice Age Trail Alliance in 2013.

The Brand Platform is the touch point for all cohesive branded activity moving forward.

IATA Brand Platform: Is the guiding document for managing and implementing IATA’s brand including:

- ◆ Target audiences
- ◆ Brand promise (what we provide better than anyone else)
- ◆ Brand essence (reason for being)
- ◆ Brand identity and personality (tonality that reflects your character)
- ◆ Brand truths (undeniable truth about who we are)

The IATA is looking to review and reinvigorate its regional brand and take it to the next level based on market research and field surveys that were conducted of current users, volunteers and stakeholders. By understanding both the socioeconomic and lifestyle preferences of the trail user base, the Alliance can begin to make decisions about how to best implement their branding on a regional level to attract new visitors into the greater area and expand Trail usage and activities.

A Joint Effort Marketing – Year 2 Grant would help IATA to invest in the implementation of the reinvigorated Trail branding that will give multiple, yet collaborative destinations, a competitive edge in the tourism marketplace. Communities along the Trail are ripe and ready to make the next step and establish themselves as tourism destinations with multiple and varied activities, services, and events for its visitors. Abundant natural beauty creates a strong brand image that is authentic, honest, and understandable within and outside of the state. It is the optimal time to devote energy and resources to clearly launch a regional brand and run with it.

IATA BRAND

Create, Support and Protect a Thousand-Mile Wisconsin Footpath

The Ice Age Trail Alliance is dedicated to create, support and protect a thousand-mile footpath tracing Ice Age formations across Wisconsin.

Brand Promise

Together with private landowners, businesses, the National Park Service, Wisconsin Department of Natural Resources, local units of government and thousands of volunteers, the Ice Age Trail Alliance works to create, support and protect a thousand-mile footpath tracing Ice Age formations across Wisconsin — the Ice Age National Scenic Trail.

Identity



Take a walk through time

The Ice Age Trail Alliance (IATA) is a non-profit, volunteer- and member-based organization headquartered in Cross Plains, Wisconsin. Its mission is to create, support and protect a thousand-mile footpath tracing Ice Age formations across Wisconsin. More than 3,000 members nationwide support the IATA in the completion of its mission through on-the-ground work and financial gifts.

The Ice Age Trail, one of only eleven National Scenic Trails in the United States, is a thousand-mile footpath highlighting Wisconsin's world-renowned Ice Age heritage and scenic beauty.

A variety of geological landforms, associated almost exclusively with glaciation, are better seen in Wisconsin than anywhere in the world. These include moraines, eskers, erratics, kettles, drumlins, kames, dells (dalles) and outwash plains.

The Ice Age Trail route takes visitors through some of Wisconsin's most scenic terrain, highlighting mature forests, expansive prairies and thousands of lakes and rivers.

The Trail is suitable for walking, hiking, backpacking and snowshoeing over a wide range of distances and landscapes. Much of the Trail offers solitude, but occasionally it takes adventurers right down the main streets of charming Wisconsin communities such as Sturgeon Bay, Hartland, Janesville, Lodi and St. Croix Falls. Whether someone is seeking a short stroll over gentle terrain or a multiday deep-woods adventure, there is a segment of the Ice Age Trail for all.

The Ice Age Trail Alliance helps visitors take a walk through time.

Brand Essence

The Ice Age Trail Alliance Essence – The Ice Age Trail Alliance's identity highlights the emotional connection to Wisconsin's icy past.



Though the work of the glaciers in Wisconsin occurred more than 10,000 years ago, the notion of a hiking trail celebrating the state's Ice Age legacy dates back just a century. The story of the Ice Age Trail is a fascinating mix of vision, conservation and passion involving some of Wisconsin's most famous politicians and thousands of private citizens. Because the Ice Age Trail Alliance was established not long after the idea of the Ice Age Trail itself took shape, their histories are inseparable.

Tone and Personality of the Brand

- ◆ **Beautiful** - Stunning views. Breathtaking experience.
- ◆ **Natural** - Step into the icy past of Wisconsin and see the beauty of the state.
- ◆ **Peaceful** - Serene. Tranquil. Relaxing. Connect to the land. Escape.
- ◆ **Adventure** - What lies ahead around the next bend? Never the same trip.

See Appendix C for the Ice Age Trail Alliance – 2012 Brand Manual.

PRELIMINARY MARKETING PLAN

Marketing Plan

The Ice Age Trail Alliance (IATA) is an area that has great potential to increase its visibility and awareness as an outdoor recreation destination. The thousand-mile Trail has many positive and desirable attributes, unique venues, and many scenic trail views and wildlife. The Ice Age Trail is more than just a path as it connects visitors to the beauty that makes Wisconsin outdoor recreation areas attractive to visit. However, there are many people who are not aware of the Trail and its availability. The Ice Age National Scenic Trail may be a well kept secret, but one that needs to be revealed.

The purpose of this preliminary marketing plan is to increase usage of the Ice Age Trail, to encourage overnight stays near the Trail, and to educate more people about the Ice Age Trail.

Objectives

The primary objectives of this marketing plan are to:

- ◆ Unify the Ice Age Trail throughout Wisconsin and maximize its educational and promotional outreach potential to future visitors.
- ◆ Obtain input from trail users on the characteristics and essence in the updated logo, strategy and marketing efforts.
- ◆ Educate all visitors and potential visitors to make the Ice Age Trail a relaxed and healthy outdoor recreational destination that delivers on the brand promise of authentic experiences.
- ◆ Obtain funding to develop, implement and support the updated brand launch and roll-out campaign in the market with a robust, multi-layered integrated marketing communications program.
- ◆ Unify all promotion efforts while promoting each individual community's unique contribution to the whole.
- ◆ Work with the communities to include venues and attractions of interest in their areas and tie them together across the Ice Age Trail to encourage increased visitor spending and overnight stays.
- ◆ Work to increase overnight stays.
- ◆ Make more people aware of the many natural and recreational activities available on the Trail based on the activities of walking, hiking, birding, camping, etc.
- ◆ Provide unified itinerary lists of all of the activities to choose from making it easy to enjoy the attributes of the Trail.

Target Geographic Markets

- ◆ Madison, Wisconsin
- ◆ The following counties: Milwaukee, Dodge, Fond du Lac, Portage, Marathon, Waukesha, Jefferson, Kenosha, Racine, Rock, and Sheboygan
- ◆ The Fox Cities area of the State
- ◆ All of Northern Illinois including Chicago and surrounding suburbs including the following counties: Cook, Boone, De Kalb, Du Page, Kane, Lake, McHenry, and Winnebago
- ◆ Rochester, Minneapolis and St. Paul, Minnesota
- ◆ Dubuque, Iowa
- ◆ Outdoor recreation and silent sports enthusiasts from Wisconsin and the surrounding states
- ◆ Families looking for outdoor activities during all the seasons of the year

Competitors

- ◆ National Park Service administrated properties
- ◆ Wisconsin State Parks
- ◆ Door County, Wisconsin and Bayfield, Wisconsin

Obstacles

- ◆ Confusion exists among visitors and potential visitors particularly on what they can or cannot do on the trails
- ◆ Lack of education, awareness and visibility for the array of trail activities including hiking, birding, camping, or other assets, programs and initiatives.

Opportunities

- ◆ Offer a wide variety of activities and events to broaden the interest base and attract visitors who want to participate in these outdoor pursuits. Piggybacking onto events and activities going on in neighboring cities or communities may draw visitors to the area for a longer stay.
- ◆ Increase visitor traffic to the local communities.
- ◆ Outdoor venues featuring cross-country skiing, snowshoeing, ice skating, sledding, tubing, or any other sporting activity.
- ◆ Promote restaurants, shopping and entertainment venues like the theaters, art or music festivals; destination and educational venues such as local museums or wildlife refuge; and develop other destinations to support trail activities.

Strategy

In order for this campaign to be embraced by stakeholders, volunteer chapters should be involved in the planning phase. We recommend a series of chapter strategic planning meetings with the focus of the larger regional marketing and calendar of events to better inform all participants.

Each chapter can indicate what they have to offer for attracting tourism across all the seasons of the year, both outdoor and indoor activities, venues and lodging. It will also be necessary to gain buy-in and participation from local business owners. Representatives from local businesses should be invited to participate in the strategic planning meetings. Another possibility is to have each chapter reach out to businesses in their areas and solicit participation and cooperation. This is a challenge in that all must be included beyond a paid advertisement for each business to fully communicate the offerings available to visitors.

We also learned from reviewing current research that visitors gain information in a variety of ways. While online (websites, social media such as Facebook, Twitter, Foursquare, mobile apps, etc.) travel research has certainly become the standard for many travelers. There are still those who are influenced by print advertising in addition to online media. The recommendations made in the implementation program will utilize technology to communicate with audiences to peak their interest, draw them to the area, and communicate with them while in the area.

Implementation

The implementation plan should be viewed as a living document. The plan will be adjusted and enhanced based on input received from member chapters and business stakeholders as well as trail users. The plan and budget may need to be adjusted based on financial resources available for the marketing campaign.

Interactive – An updated IATA Website

The IATA website location needs to communicate the various recreational assets of each of the communities within the region, so visitors can find out everything they need to know in one place. EDP recommends a central place to obtain information on everything that is going on in the area which links to volunteer chapters and community websites. The IATA website could fulfill that need and be the primary marketing tool for the campaign. All other promotional tactics can be directed back to the individual communities.

Information should be organized, so it can be searched in a variety of ways – by date, location, type of activity, type of audience/visitors, etc. An interactive map/itinerary would allow visitors to plan their trip throughout the region and be directed to activities and venues that are of interest to them. Suggested itineraries, either regional in focus, or perhaps based on seasonal offerings and desired trip length promoted to the visitor could also be included. The IATA website needs to be compatible and functional with mobile devices.

Mobile Website for the Ice Age Trail Alliance

In addition to the regular website, EDP also recommends developing a mobile version of the website for smartphones, tablets and other mobile devices. A mobile optimized website is a viable option to compliment the current website design. For a total website redesign, a responsive design website would be suitable for both desktop/laptop browsing in addition to mobile browsing. The mobile version of the site would make it easier for visitors to research things to do and places to visit in the region while on the go. The site should be search engine optimized, so it is highly visible for travelers doing online research. A link to the website www.iceagetrail.org will be included on all electronic promotional materials and information relating to the tourism campaign. QR (quick response) codes should be included in the marketing campaign.

Email Promotions

Continue building your email database and using it to promote and education current users, members and chapters on events. We also recommend looking at purchasing or renting travel email lists that are within the target markets especially those for hikers and outdoor enthusiasts.

Literature

Information on the tourism and branding campaign can be included in the existing visitor guides distributed throughout Wisconsin. The website URL would be featured in the visitors guides to direct tourists to the web to learn more about the activities on the Ice Age Trail.

Although print literature can be more costly than some other initiatives, it is imperative that complete information on all activities, venues, and locations be disseminated to potential visitors who do not conduct their travel research on the internet. Because activities relating to the tourism and branding campaign will take place all over the region, it is important to make locating venues and activities as easy as possible for visitors as some may not be familiar with the area. Creating a comprehensive, easy-to-use map or itinerary of the region highlighting all of the outdoor and indoor activities would benefit visitors navigating through the region and take advantage of available offerings.

In addition to being used as fulfillment for phone and web inquiries, the maps and itineraries can also be distributed by local businesses, hotels, restaurants, theatres, technical and college campuses, chambers and CVBs. This gives local business and tourism stakeholders a chance to have face-to-face contact with potential visitors and through their enthusiasm generate excitement about the campaign as they pass out the maps and provide visitors with a reason for a return visit. Lodgings are an especially good place to distribute because they can directly influence return visits resulting in overnight stays.

Advertising

Our media placement recommendations are based on the following criteria:

- ◆ TravelWisconsin Co-op Advertising Program offered by the Wisconsin Department of Tourism. It pools the resources of the Department with individual organizations and advertisers to generate a more powerful Wisconsin travel message. It offers opportunities in print, online, at TravelWisconsin.com and in email blasts.
- ◆ Researching media that is directed toward the identified demographics of the target audience.
- ◆ Finding the best value for media placed.
- ◆ Negotiating value-added packages combining paid and earned media.

Online

Banner ads can be placed on relevant websites to target the various audiences in the Madison, Travel Wisconsin and northern Illinois, Iowa and Minnesota areas to drive them directly to the IATA's website. Media research will help determine the best placement opportunities based on the available budget.

Pay-Per-Click Campaign

Implement a Google AdWords campaign to promote the Ice Age Trail. A promotional website will be noticed in common searches for outdoor and silent sport travel as well as nature, birding and other Ice Age Trail activities by the target audiences. The AdWords campaign would help draw more visitors to the central website and inform more people that may not have otherwise seen the listing of community activities.

Print

IATA can evaluate print publications based on the targeted audiences, potential number of impressions, and possible co-op opportunities. It may be feasible to purchase a spread ad in key urban areas such as Milwaukee or suburban Illinois publications that also include earned media opportunities, such as email deployments and online promotional opportunities. The cost of the co-op spread ad can be shared with business stakeholders from chapter communities who would like the opportunity to advertise their offerings with a limited budget. The impact of one large ad with several businesses featured under one promotional banner is much greater and much more cost effective than if the businesses were purchasing the media on their own.

Public Relations

Public relations will require a process defining who will be the one to take the interviews, particularly if they are phone calls into various offices. It is recommended that a process be designed that defines:

- ◆ Before any press release, have a bullet point text prepared with more information about the subject, and details about what information can be released about the organization.
- ◆ Assign a person to take interview calls.

- ◆ Try to have the person leave their phone number and have the person call back shortly thereafter. This gives the primary person some preparation time to review the press release information before the interview.
- ◆ Follow the elements recommended for a comprehensive public relations initiative of the overall campaign.
- ◆ Do not give out too much information and stick to the script as much as possible.

The goal in this interview process is for the interviewee to have control of the interview.

Media Relations

Because this is a multi-regional initiative, it will have higher visibility and generate more interest than a single event. Communication lines can be with key members of Wisconsin and Illinois media to keep them informed of Ice Age Trail happenings. Sending editorial alerts on a regular basis to all media outlets to give them the pertinent information they need about the campaign. There is also the potential to generate interest for TV, radio and newspaper interviews of various stakeholders during the campaign. It will be important to create media “buzz” for the Ice Age Trail.

- News Releases
A series of timely news releases will be deployed to media prior to and throughout the duration of any marketing campaign. This is a cost-effective way to reach media both in the target and peripheral markets.
- Media Kits
Media kits that include news releases about IATA, travel guides, and other relevant information can be prepared and provided to select media outlets. The media kits will also be made available online on the website. Perhaps a small giveaway that captures the theme can be included to catch the attention of editors.
- Media Alerts
Media alerts will be sent to TV stations for specific events that provide video and photo opportunities to media.
- Online/Print Event Calendars
Every opportunity to get events associated with the Trail. The Ice Age Trail must be listed in print and online event calendars, especially on the TravelWisconsin.com website must be taken advantage of.

Social Media

It is important with all social media platforms to have information relevant for a variety of interests and audiences, to keep the information current, and to maintain a dialogue with your audiences on a regular basis. While numerous social media platforms are available, we recommend the following platforms for the target audiences in this campaign.

- ◆ Facebook
- ◆ Twitter
- ◆ Blogging
- ◆ Flickr
- ◆ Pinterest
- ◆ Foursquare
- ◆ YouTube
- ◆ LinkedIn

Facebook and Twitter posts should be developed and employed for seasonal promotions and events. Since many area CVBs have Facebook and Twitter accounts, they can engage with the Ice Age Trail Alliance in addition to trail users, volunteers, businesses, partners and supporters. Social media platforms should also reference other social media outlets as well. Because Foursquare is a geo-location site, visitors can use it to communicate their whereabouts with friends who are in the area, recommend activities, and plan to meet up with them. Video clips of visitors enjoying the Trail's activities should be posted on YouTube on a regular basis and include both indoor and outdoor activities.

Premiums and Promotions

Special offers and premiums can be provided by area businesses to visitors. Special offers/coupons/contests/packages that can be used for drawings will encourage potential visitors to register for information.

How to Contact Us

IATA should have a Wisconsin hotline; a toll free number should be provided on all promotions to call for information or order literature. This can be an existing number, like the IATA's toll free number, or a special phone number relating to the campaign can be established. A dedicated line helps track and measure the effectiveness of the promotion and help quantify the results. This number along with the website URL should be included on all promotional materials.

IATA Marketing and Promotional Successes:

- ◆ **Discover Wisconsin** – Discover Wisconsin TV series feature the Ice Age Trail and partner communities to a viewer base of over 11 million homes over the course of 2 years for each episode. The Discover Wisconsin syndicated television network includes Wisconsin, Illinois, Minnesota, Iowa, Indiana, North and South Dakota, and Michigan's Upper Peninsula. The first of four thirty-minute destination based productions premiered in April of 2011. Partners in that production were the City of St. Croix Falls, Rusk County, Chippewa County Tourism Council, and the Rice Lake Tourism Bureau. The second production premieres in April of 2012, and partners include the Merrill Area Chamber of Commerce, Waupaca Area Chamber of Commerce, IATA-Waupaca County Chapter, and Waushara Area Chamber of Commerce. The third production premieres in April of 2013, and partners include the Baraboo Area Chamber of Commerce, City of Verona, Janesville Area Convention & Visitors Bureau, and Whitewater Area Chamber of Commerce. A fourth production is in the creative production stage, and partners include Door County, Sheboygan County, Washington County Convention & Visitors Bureau, and the City of Delafield.

- ◆ **Mobile Skills Crew program** – Hosting 8 -10 large scale volunteer trail events each year since 2002 with as many as 350 participants per event, projects embrace the communities that the Trail serves and leaves a lasting recreational opportunity at their doorstep. These events are widely covered by local media outlets that include newspapers, radio, television and the internet.
- ◆ **George B. Hartzog Awards** – The IATA was recognized by the National Park Service with its highest award for volunteer service. In 2008, the Alliance, as an organization was recognized, and in 2010, they were recognized for the commitment to community service that engages youth through our Summer Saunters outdoor education program.
- ◆ **Summer Saunters program** – IATA representatives presented this youth outdoor education initiative at national conferences in Washington, D.C., Missoula, MT, and Abington, VA.
- ◆ In 2007, an endurance runner from the Madison area and member of the IATA Board of Directors, Jason Dorgan, completed the first thru-run of the Ice Age Trail setting a record of 22 days. He covered 1,059 miles and drew media attention daily. Dorgan has presented his story to countless groups since that time.
- ◆ **Silent Sports** magazine contributors regularly promote events along the Ice Age Trail.
- ◆ Since 2008, the Ice Age Trail has been featured numerous times in Backpacker Magazine and other national publications as a result of IATA’s booth and marketing initiatives at the Outdoor Retailer (OR) exposition in Salt Lake City, UT. The OR show features outdoor recreation manufacturers from around the world and retailers from throughout the Western Hemisphere.
- ◆ In 2010, the Alliance contracted to redevelop its website, www.iceagetrail.org, as an interactive resource that provides information, current Trail conditions, maps and featured events.
- ◆ With strong support from the Village of Cross Plains, the national headquarters for the Ice Age Trail Alliance was permanently established on the Trail in 2009. Congresswoman Tammy Baldwin helped cut the ribbon at the dedication in July of 2009. Madison-based media provided exceptional coverage of the dedication and the accompanying Trail improvement project in the village.
- ◆ Ice Age Trail Alliance’s Inn Style directory of B&Bs, inn and cottages along the Ice Age Trail is promoted via the website and through brochures. Established in 2007, the IATA’s Inn Style directory has generated business and successfully partnered with over 50 participating businesses (see Appendix H).
- ◆ Ice Age Trail Alliance partner organizations (see Appendix I for entire list) include, but are not limited to:
 - American Hiking Society
 - American Red Cross
 - AmeriCorps
 - Boy & Girl Scouts
 - Gathering Waters Conservancy
 - Lac Courte Oreilles Tribe

- Langlade County Forestry and Parks
- Lodi School District
- Menominee Tribe
- Natural Heritage Land Trust
- National Park Service
- Partnership for the National Trails System
- Rock County Parks Department
- National Trails Fund
- University of Wisconsin-Madison Hooper Outing Club
- U.S. Fish and Wildlife Service
- Wisconsin Bed & Breakfast Association
- Wisconsin Department of Natural Resources

ECONOMIC IMPACT – KEY RESULTS

Ice Age Trail Tourism and Economic Impact - Baseline

The Ice Age Trail Alliance has two economic impact goals for this project:

- ◆ To estimate the economic and tourist impact based on current visitation to the Ice Age Trail
- ◆ To establish a research-based annual number of Ice Age Trail users in total and promote Trail areas with the greatest opportunity for positive economic impact

Prior to 2012 the annual visitation to the Ice Age National Scenic Trail was not quantified. Through the market research conducted in this study, annual usage of the Ice Age Trail is estimated at **1,252,685 annually**. This estimate of trail users was more accurately measured through field survey market research through the JEM grant. Field market researchers were onsite to interview users at major trail gateway destinations during peak and shoulder tourism times to record number of users, usage patterns and frequency, demographics, lifestyle preferences, socioeconomic data, to collect input from existing and potential users/visitors, including the following locations:

- ◆ Southern Kettle Moraine State Forest
- ◆ Devil's Lake State Park
- ◆ Two Rivers, Point Beach State Forest, Kewaunee
- ◆ St. Croix National Scenic Riverway

The largest number of annual visitors using the Trail accesses it through the Kettle Moraine State Forest units and Wisconsin state parks like Devil's Lake State Park, Interstate State Park and Potawatomi State Park.

Trail use and the activities of users have a wide variety of local impacts that include social, environmental, and economic effects. Our specific interest focuses attention on the economic impacts associated with use of the Ice Age Trail. Economic impacts can be broadly defined to include both market-based and non-market based effects. The latter includes such elements as the Trails' impact on local quality-of-life, environmental quality, and the values we place on our ability to pass on productive resources to the next generation. While important, these are beyond the scope of this study. Our specific interest in local economic impacts focuses on the market-based economic effects associated with day trip and overnight trip related expenditures of trail users. This market-based economic impact is important because a portion of these dollars exist as new economic stimulus;

money flowing into the region from the outside that would not happen were it not for the Trail itself.

We begin this section with a brief baseline overview of the regional economy currently within the Ice Age Trail. Following this, we describe the extent to which Trail users spend money and focus on the estimation of new money flowing into the region as a result of local and non-local trail user expenditures. Once expanded on an annual basis, these inflowing funds are then applied as a regional economy stimulus to assess how the regional economy reacts to this influx of new dollars. This regional economic change is thus used as a basis upon which to discuss and describe the local economic impact associated with the Ice Age Trail.

The regional economy of the thirty-one counties that encompass the Ice Age Trail are hugely diverse, from the rural communities, forested lands, rolling hills, farms, and bucolic landscapes of southern and central Wisconsin to the more urban communities along the Kettle Moraine with larger demographic populations and greater regional employment generating higher personal incomes.

The Baseline Economic Impact Surrounding the Ice Age Trail

There were two major forms of economic impact of the Ice Age Trail. The first is the direct impact caused by expenditures from the outdoor recreation users and volunteers and their family members, such as on meals and refreshments purchased, lodging, transportation, before, during or after their outdoor or sport activities. The second impact is the expenses paid by the users, silent sport enthusiasts and local employers such as in salaries to employees to support tourism within the Ice Age Trail boundaries. In order to determine the economic impact of spending habits of the Ice Age Trail users and volunteers on the communities they travel to, the 2011 IMPLAN economic modeling system was utilized. This modeling system produces an economic multiplier, which is a quantitative measure of economic impact that takes into account the interconnectedness of all levels of an economy. When dynamic changes take part in one segment of an economy, there will be residual effects throughout the entire system. This change will typically result in a greater total impact than the original injection of capital expenditures into the economy. Input-output modeling is the most commonly used method to assess the economic impact of tourism by many other states as well as at the national level.

To gauge the economic impact of the Ice Age Trail on the State of Wisconsin, the Fiscal and Economic Research Center (FERC) built and employed a proprietary ICE AGE TRAIL IMPLAN (Impact analysis for planning) economic modeling system referred to as V2T. This model produces an economic multiplier, which is a quantitative measure of economic impact that recognizes that all levels of economies are interconnected networks of interdependent activity. When one part of the economy changes the rest of the economy will be influenced by that change. This will typically result in a greater total impact than was caused by the original injection of capital into the economy. V2T IMPLAN is capable of determining the overall economic impact that initial spending has on the local economy. The V2T IMPLAN model uses survey data to

estimate how many different spending categories affect the local economy in terms of initial effect, direct effect, indirect effect, and induced effect.

Direct, Indirect and Induced Economic Impact of the Ice Age Trail Users and Volunteers

Direct Effect: This indicator refers to the spending brought about by the spending patterns of the Trail users, volunteers and family members on items and services such as lodging, food and beverages, gas for transportation, admissions, etc. The potential direct impact of Ice Age Trail users based on their spending patterns is **1,481 jobs** created, paying out over **\$35,413,364 dollars in wages and benefits** for a **total economic impact direct effect on the economy of \$113,961,357**. Refer to Table 1.

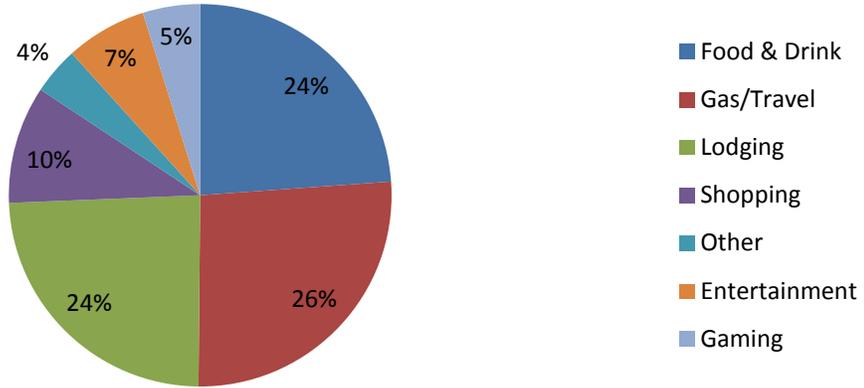
Indirect Effect: The indirect effect on the economy is created by several expenditures including utilities, insurance and maintenance costs. This spending creates additional jobs in those industries that supply those services. These impacts are referred to as indirect effects because they are indirectly created by the establishment of jobs that support the tourism and economic development in the communities.

Induced Effect: Another impact occurs from the people who work for tourism and service businesses spending their earned income in the local communities. This spending creates jobs in the businesses that provide services. These impacts are called induced impacts. The induced effect measures the effects of the changes in household income spending money at restaurants, grocery stores and shops locally.

TABLE 1: ECONOMIC IMPACT OF THE ICE AGE TRAIL USERS & VOLUNTEERS

| Total Economic Impact of the Ice Age Trail: | | | |
|--|---------------------|---------------------|------------------------|
| Impact: | Jobs Created | Labor Income | Economic Impact |
| Direct Effect | 1481 | \$35,413,364 | \$113,961,357 |
| Indirect Effect | 326.1 | \$14,855,717 | \$44,807,890 |
| Induced Effect | 349 | \$13,454,240 | \$42,689,380 |
| Total Effect | 2156.2 | \$63,723,323 | \$201,458,627 |

Total Economic Impact of the Ice Age Trail



| SPENDING BY SECTOR | |
|---------------------------|----------------------|
| Food & Drink | \$48,062,799 |
| Gas/Travel | \$52,954,247 |
| Lodging | \$48,787,884 |
| Shopping | \$20,049,185 |
| Other | \$8,044,994 |
| Entertainment | \$13,799,640 |
| Gaming | \$9,759,879 |
| TOTAL SPENDING | \$201,458,628 |

METHODOLOGY AND DATA SOURCES

Domestic visitor expenditure estimates are used from Longwoods International's Tourism Economics representative surveys of US travelers. These are broken out by sectors (lodging, transport at destination, food & beverage, retail, and recreation), by purpose (business and leisure), and by length of stay (day and overnight).

Tourism economics then adjusts these levels of spending based on a range of known measures of tourism activity:

- ◆ Overseas visitor spending (source: OTTI, TE)
- ◆ Tax data (sales tax, bed tax)
- ◆ Spending on air travel which accrues to all airports and locally-based airlines
- ◆ Gasoline purchases by visitors (source: TE calculation)
- ◆ Smith Travel Research (lodging performance)
- ◆ Industry data on employment, wages, GDP, and sales (source: BEA, BLS, Census)
- ◆ Methods and data sources Longwoods International (visitor surveys)
- ◆ Bureau of Labor Statistics (jobs and wages by industry)
- ◆ Bureau of Economic Analysis (jobs, wages and GDP by industry)
- ◆ US Census (business sales by industry)

RECOMMENDATIONS - CALL TO ACTION

- ◆ The Ice Age Trail is an *ideal region* for land-based outdoor recreation and silent sport activities in Wisconsin. It is important to note that the Ice Age Trail touts year-round climates and venues suited to a broad range of outdoor recreation activities. The region provides plenty of access to natural resources of all types, beautiful fall colors, winter snow and warm summers. Another factor is access to a reasonable amount of undeveloped, pristine spaces for relaxation and natural beauty. **Promote the Ice Age Trail as a year-round destination to encourage more visitors to use the Trail in every season.**
- ◆ **Annual Economic Impact of 1,252,685 Ice Age Trail Users.** Based on the proprietary V2T Model, the estimated 2012 economic impact of the current 1,252,685 baseline users to the Ice Age Trail region would be 1,481 full time equivalent jobs that tend towards the tourism industry. Estimated labor income of \$63,723,323 annually would contribute \$201,458,627 in direct, indirect and induced sales from the visitors to the region. **Promote the economic impact of the Ice Age Trail to surrounding trail communities, businesses, and local and state organizations. Encourage promotions to trail users and volunteers to expand spending and overnight stays.**
- ◆ Work with volunteers to continue to develop and construct contiguous segments of the Trail to optimize the user's experience. **Continue to expand the volunteer Mobile Skills Crew program as well as the local volunteer chapters.** Develop youth-based volunteer programs engaging young people in meaningful service learning and encouraging future trail users and stewards.
- ◆ Build a strong brand, identity and sense of place for the trailway. Develop and implement the IATA brand to create a stronger, more unified website and trail identity. **Launch and promote the newly revised and reinvigorated IATA brand, positioning and tagline in 2013 with the support and collaboration of the IATA volunteer chapters, members and trailwide volunteers.**
- ◆ The Ice Age Trail is already positioned as a great outdoor recreation venue. This region has proven ability to attract outdoor recreation enthusiasts traveling statewide and regionally and thus creating a valuable economic impact for the region. However, the IATA needs to focus on gaining new visitors to the region based on growing segments of outdoor recreation including **hiking/walking (86 percent), running (64 percent), and Geocaching/Earthcaching (39 percent).** Develop and implement programs and itineraries geared at these growing tourist segments. **Marketing, promotional and advertising initiatives that include the TravelWisconsin.com and IATA website should be developed and budgeted.**
- ◆ Based on this study, the most popular outdoor recreation sports include hiking/walking, (86 percent), running (64 percent), Geocaching/Earthcaching (39 percent), and cross-country skiing (25 percent). **Many outdoor recreation enthusiasts participate in multiple sports**

depending on the time of year, so it is vital to develop and implement a full calendar of events aimed at these popular outdoor recreation activities year round.

- ◆ Support the development of economic and tourism initiatives that increase the opportunities for trail usage. Encourage communities and local businesses to promote and to become stronger partners in the Trail’s tourism efforts. The IATA should **establish a trail town or trail community program** recognizing communities who promote and protect the Ice Age National Scenic Trail. Trail users recognize nearby towns as assets, and local community members in turn recognize the Trail as an asset.
- ◆ Promote tourism and recreational use of the Trail through the development of **activity – based itineraries** that tie together all segments of the Trail and their tourism attractions such as lodging, dining and experiences aimed at optimizing the trail visitors’ experience. This will encourage longer stays, increased expenditures and overnight lodging throughout the Ice Age Trail.
- ◆ Encourage and promote silent sports opportunities in partnership with the Department of Natural Resources and National Park Service in creating and supporting the Ice Age National Scenic Trail. The Ice Age Trail, specifically the Baraboo Hills/Devil’s Lake State Park area, was chosen as one of 100 projects that would reconnect Americans to the natural world. The **America’s Great Outdoors (AGO) priority initiative** for the Ice Age National Scenic Trail is to establish a model trail segment highlighting the glacial landscapes between the City of Madison and Aldo Leopold’s Shack in Sauk County.
- ◆ Silent sports and outdoor recreation ‘hot spots’ tend to be based in small and mid-sized communities with close proximity to deep, wooded trails and parkways, snowy slopes, and pristine waterways. It makes sense that the Ice Age Trail would develop into a place that caters to outdoor adventure offering a rich landscape ripe for the exploring. This describes the Ice Age Trail perfectly and should be promoted in the branding effort.
- ◆ Silent sports and outdoor recreation tourism is based on a **culture** that underlies and infuses many towns in this region. Small businesses can find success in providing silent sports and outdoor recreation enthusiasts with the products and services visitors enjoy – from top-of-the-line specialty outfitters and homey little inns and campgrounds to gourmet coffee shops and locally-grown foods.
- ◆ Hayward, Wisconsin is a great example of becoming a winter sports ‘hot spot.’ For several days in February, more than 6,000 cross-country skiers move along the 51K-long Birkebeiner Parkway. The American Birkebeiner, or “Birkie,” as it’s commonly known, is North America’s largest cross-country ski marathon, attracting skiers from around the globe. Then in the fall, 2,500 bikes cycle through 40 miles of thick woods as part of the area’s Chequamegon Fat Tire Festival, one of the biggest races of its kind in the country. This exemplifies strong outdoor recreation tourism in one Wisconsin community that can serve as a model for the Ice Age Trail region.
- ◆ Develop a **unique and signature Ice Age Trail Alliance annual event** promoting the Ice Age Trail and the numerous trail activities to potential, new and current trail users

including Ice Age Trail Alliance members and volunteers. Encourage community collaboration in optimizing trail visitor experiences and further solidify the Trail as a community asset. Experiences should occur both on and off the Trail. A **trail festival event** could annually attract several hundred people from throughout the Midwest over a long weekend in late summer.

- ◆ While the seasons and temperatures may vary in Wisconsin, the faces behind the ski goggles, snowshoes, running shoes and bike helmets are often the same. You see the same faces hiking or running the nearby trails are slipping kayaks into the surrounding lakes and rivers. This is what makes outdoor recreation tourism unique – sports enthusiasts change their sport activities to vary with the seasons – resulting in repeat visits to the area in every season.
- ◆ Outdoor recreation enthusiasts and tourists are the most desirable target demographic, touting median income between \$60,000 - \$79,999. This is greater than the average household income of Wisconsin, which is \$38,969. They range in age from 30 – 59 years, with an average age of 38 years old, are employed full time and over 50 percent have graduated from college and 31 percent have their master’s degree. Their disposable income allows them to travel for their silent sport and outdoor recreation activities and spend money on food and lodging.
- ◆ The results of this study demonstrate the opportunity to further expand outdoor recreation tourism on the Ice Age Trail. The economic importance of branding, positioning and marketing the Trail as an outdoor recreation destination will attract these desirable demographic groups of tourists who are willing to participate, travel and spend money on repeated visits to the area.



APPENDICES

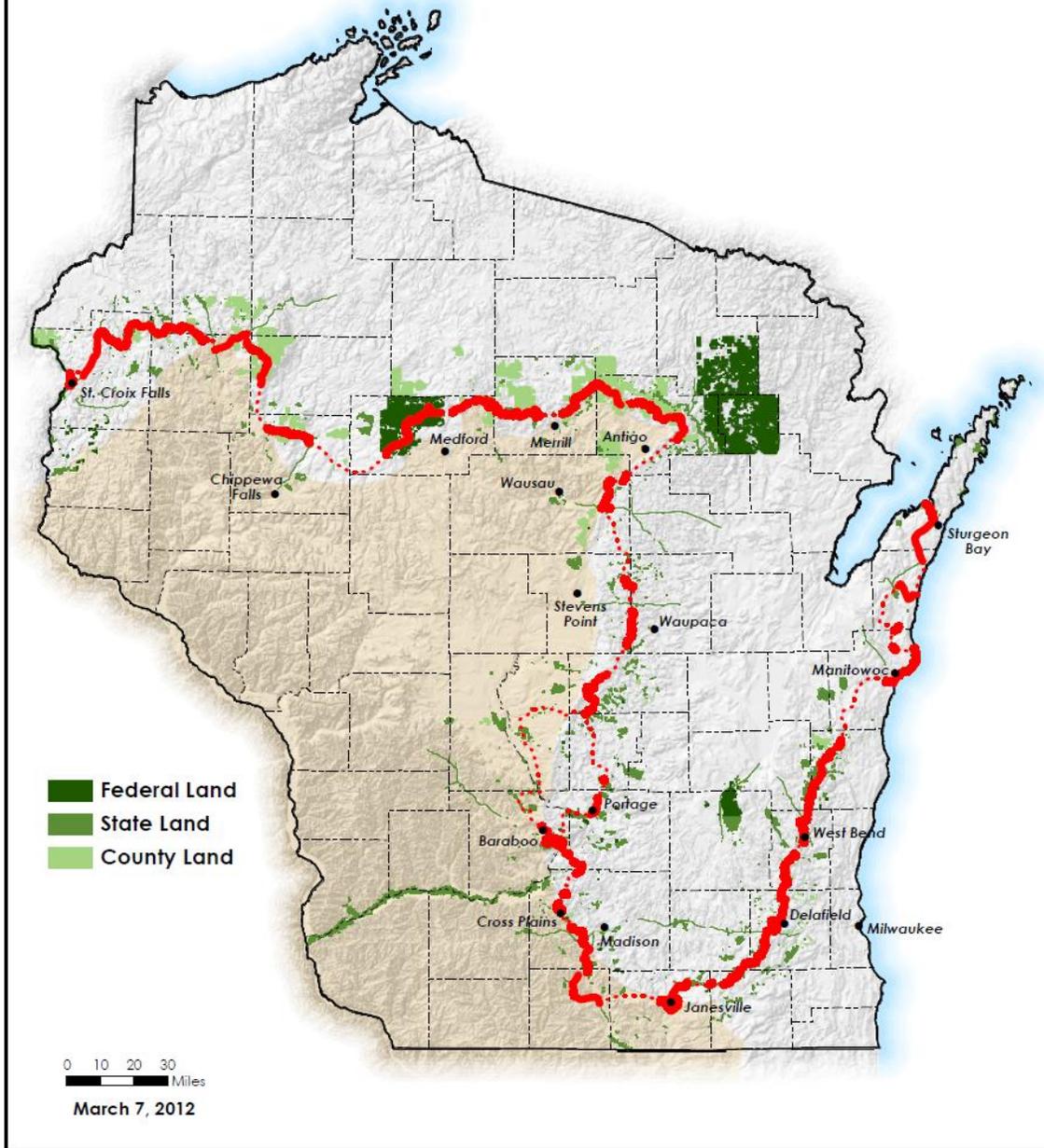
- A. Ice Age Trail Map
- B. Wisconsin Tourism 2011 Data
- C. Updated Brand Manual
- D. Online Survey of IATA Database
- E. Field Survey Ice Age Trail Users
- F. Mail Surveys to Restaurants, Hotels and Convenience Stores
- G. The Economic Impact of Silent Sports - Wisconsin – May 2011
- H. IATA's Inn Style Directory
- I. IATA Partners



APPENDIX A: ICE AGE TRAIL MAP



Public Lands along the Ice Age Trail





APPENDIX B: WISCONSIN TOURISM 2011 DATA



WISCONSIN TOURISM

Wisconsin's tourism economy picked up steam in 2011 with an impact on the state of \$16 billion, an increase of 8 percent from \$14.8 billion in 2010 according to research conducted by Longwoods International. **Over 94 million people visited the state, up two years in a row.** Tourism also supported 181,000 jobs and \$4.4 billion in personal income. Fully one in 13 jobs in Wisconsin relies on tourism. Lodging sales increased 18 percent from the lows of 2009 at the height of the recession. Visitors generated \$1.3 billion in state and local revenue and \$950 million in federal taxes in 2011 saving the Wisconsin taxpayers nearly **\$545 per household**.

The 2011 tourism campaign motivated more than 2.1 million visits in the summer and fall generating an additional \$257 million in tourism spending and \$22 million in tax revenue according to Longwoods International, a tourism consulting firm that conducted the study for the Department of Tourism. For every \$1 the department spent on the \$3.5 million advertising campaign, \$5 was returned to state and local governments in incremental tax revenue. The department received a nearly 20 percent increase in appropriation for fiscal years 2011-12. That increase came at a critical juncture when the tourism economy was showing signs of rebounding from a prolonged recession.

Longwoods International is a globally recognized leader in travel research with over 30 years of experience with hospitality clients.

Key Results for 2011

- ◆ The Wisconsin tourism recovery accelerated in 2011 with a 7.6 percent rise in visitor spending after a 7.9 percent increase in 2010.
- ◆ Visitor volumes rose for a second straight year; **95.4 million** people visited Wisconsin in 2011.
- ◆ Growth in overnight visitation remains strong. Domestic overnight visitation grew 3.7 percent buoyed by strong room demand growth of 3.6 percent in 2011.
- ◆ Per trip spending rose as gas prices rose and other tourism providers started to recoup recessionary price cuts.
- ◆ Visitor spending of \$10 billion generated \$16 billion in total business sales in 2011.
- ◆ The visitor economy represents a significant source of business sales, employment, and taxes in Wisconsin.
- ◆ Total tourism business sales of \$16.0 billion in 2011 sustained 181,000 jobs both directly and indirectly.

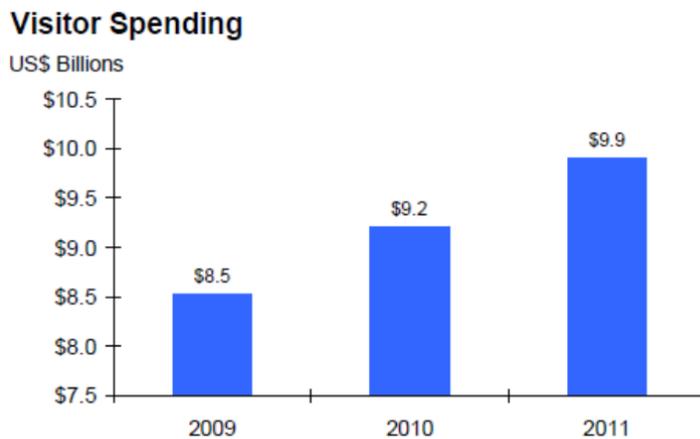
- ◆ These jobs represent 7.8 percent of total employment in Wisconsin; 1 in every 13 jobs in the state is sustained by tourism activity.
- ◆ Including indirect and induced impacts, tourism in Wisconsin generated \$1.3 billion in state and local taxes and \$950 million in federal taxes last year.
- ◆ In the absence of the state and local taxes generated by tourism, each Wisconsin household would need to pay \$565 to maintain the current level of government services.

Visitor Spending

Wisconsin visitor spending reached \$10 billion in 2011, posting 7.6 percent growth after a 7.9 percent increase in 2010.

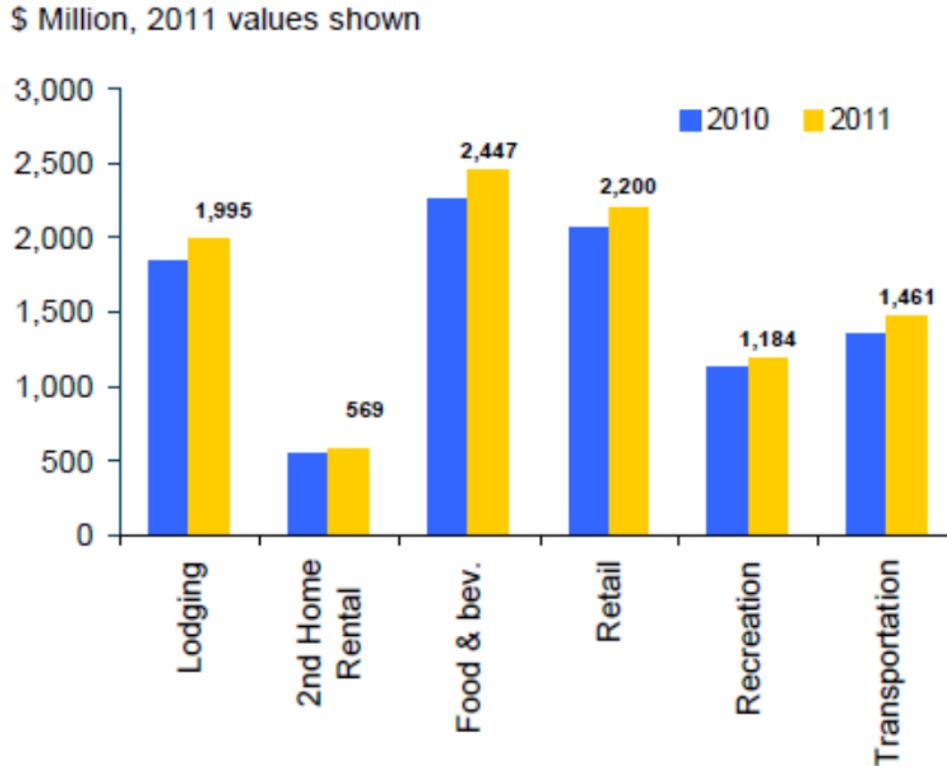
| Visitor Spending (US\$ Million) | | | | |
|------------------------------------|----------------|----------------|----------------|--------------|
| Sector | 2009 | 2010 | 2011 | % Change |
| Lodging Other | \$2,147 | \$2,380 | \$2,564 | 7.8 % |
| Transport Air | \$834 | \$957 | \$1,057 | 10.4 % |
| Food & Bev. | \$384 | \$388 | \$405 | 4.3 % |
| Retail | \$2,146 | \$2,252 | \$2,447 | 8.7 % |
| Recreation | \$1,850 | \$2,065 | \$2,200 | 6.5 % |
| TOTAL | \$8,522 | \$9,197 | \$9,898 | 7.6 % |

More overnight stays along with higher prices pushed accommodations spending up 7.18 percent in 2011.



Visitor Spending By Sector

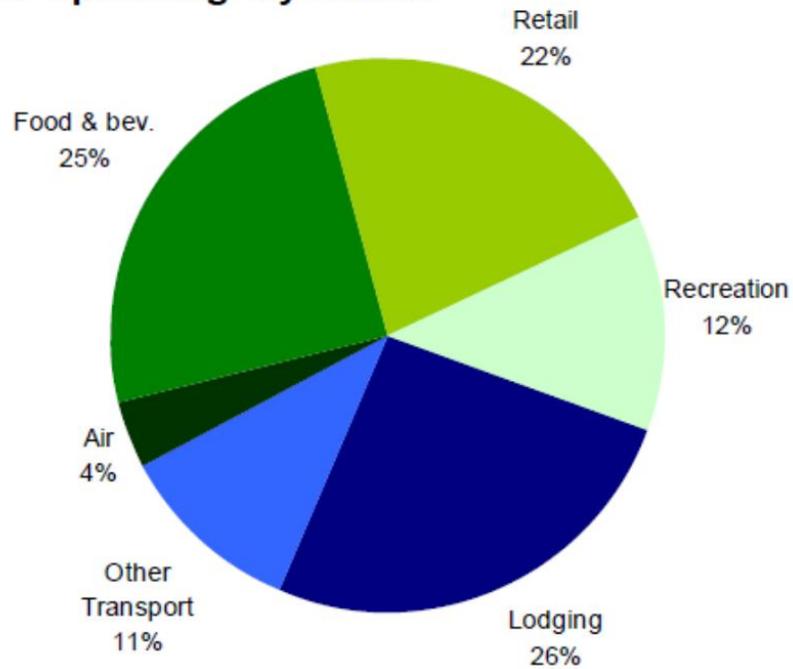
Visitors spent \$2.4 billion on food & beverages and \$1.9 billion in the lodging sector in 2011. The retail sector received \$2.2 billion from visitors. In addition, visitor spending increased 8.7 percent on food and beverage, 6.5 percent on shopping, and 7.8 percent on lodging.



Visitor Spending by Sector

Strong growth in overnight stays along with increasing room rates increased the share of spending on accommodations to 26 percent. In addition, food and beverage spending ranks second with 25 percent of visitor spending and is followed by retail at 22 percent. Higher gas prices in 2011 increased the transportation share of tourism spending up to 11 percent.

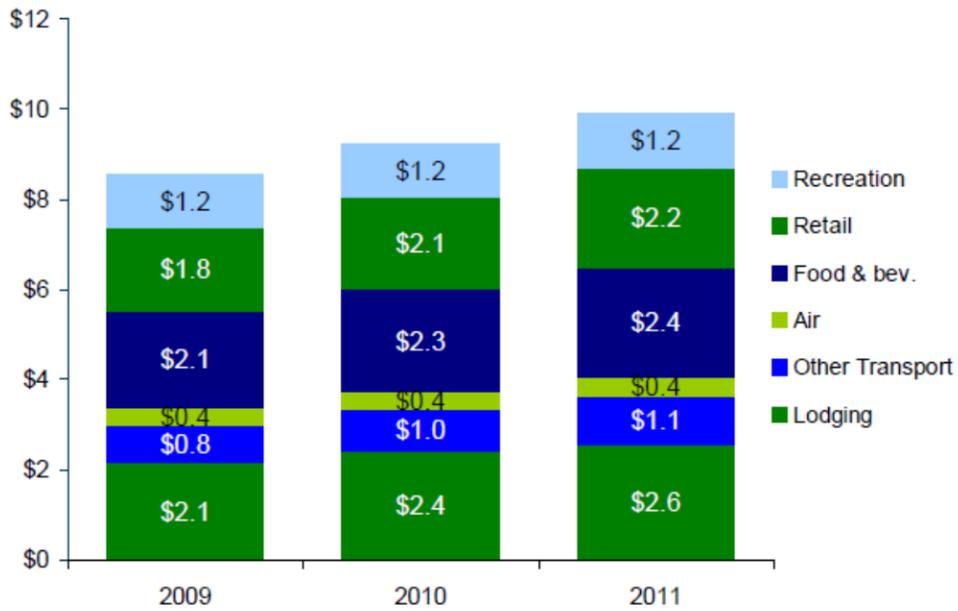
Visitor Spending by Sector



Wisconsin's robust recovery continued in 2011 across all tourism sub-sections. Lodging sales have increased 18 percent from the low seen in 2009.

Wisconsin's Visitor Spending

by Year, Billions of \$

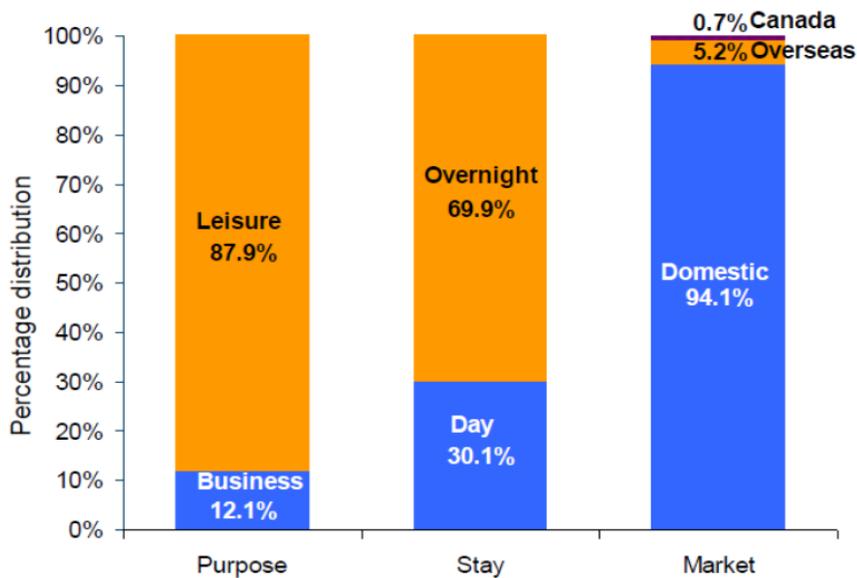


Visitor Spending by Market Segment

Leisure tourism represents 88 percent of visitor spending in Wisconsin. Overnight visitors spend \$6.9 billion in Wisconsin which represents 70 percent of the total spending. Wisconsin's International visitors spent \$0.6 billion in 2011, which represents 6 percent of all visitor spending.

| Visitor Spending in 2011 (US\$ Billion) | | | | | |
|--|--------------|--------------|--------------|--------------|--------------|
| Purpose | | Stay | | Market | |
| Business | \$1.2 | Day | \$3.0 | Domestic | \$9.3 |
| Leisure | \$8.7 | Overnight | \$6.9 | Overseas | \$0.5 |
| | | Canada | | Canada | \$0.1 |
| Total | \$9.9 | Total | \$9.9 | Total | \$9.9 |
| Share | | | | | |
| Purpose | | Stay | | Market | |
| Business | 12.1% | Day | 30.1% | Domestic | 94.1% |
| Leisure | 87.9% | Overnight | 69.9% | Overseas | 5.2% |
| | | Canada | | Canada | 0.7% |

Visitor spending by market segment



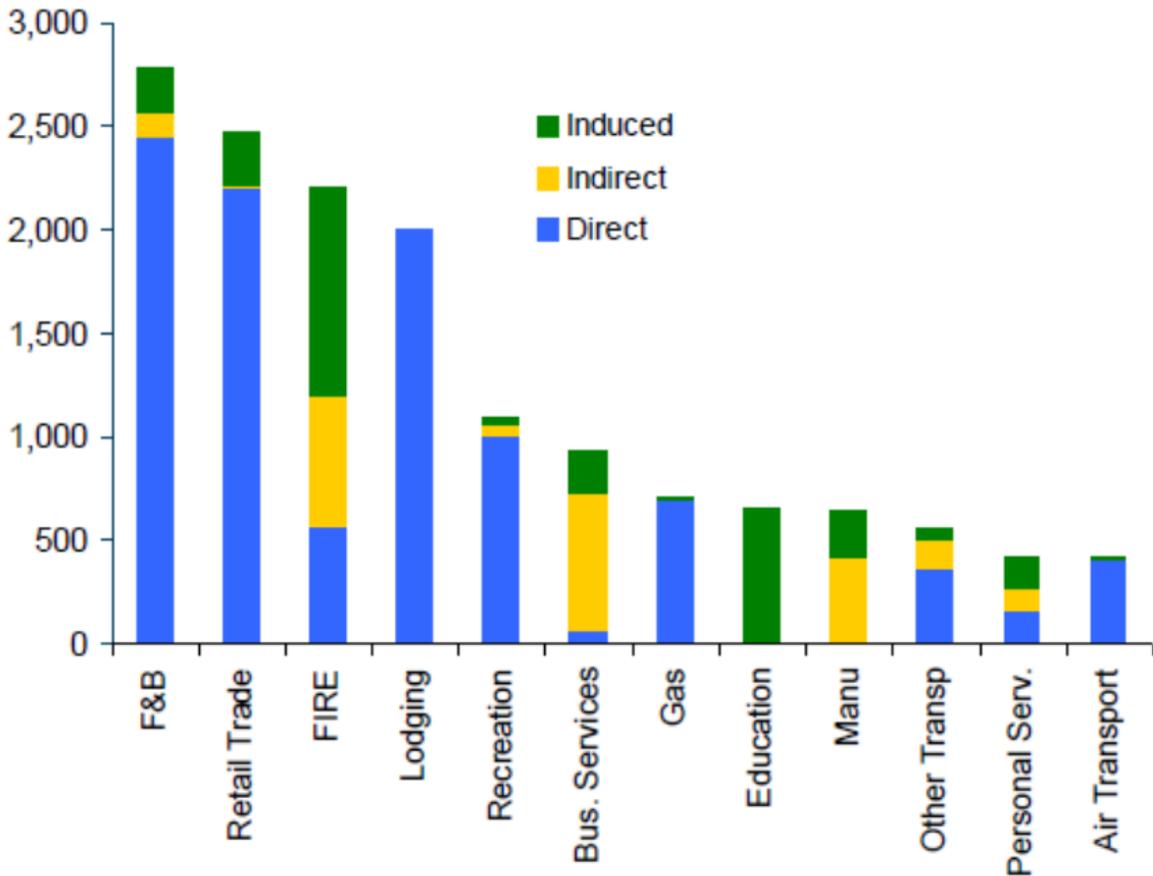
Source : Tourism Economics

Tourism Sales by Industry

All business sectors of the Wisconsin economy benefit from tourism activity directly and or indirectly. Sectors that serve the tourism industry, such as business services, gain as suppliers to a dynamic industry.

Tourism Sales by Industry

\$ million



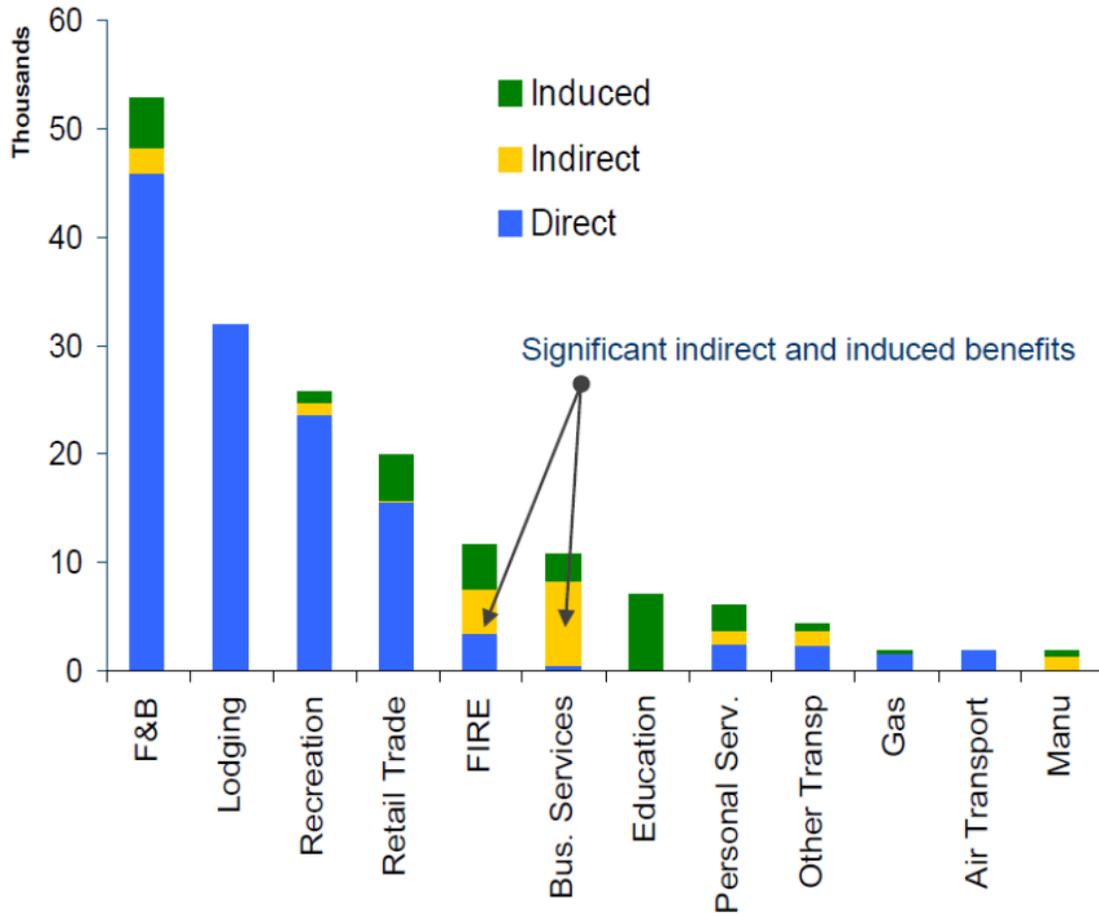
Total Tourism Employment

The tourism sector directly and indirectly supported 181,374 jobs, or 7.8 percent of all employment in Wisconsin in 2011.

| Tourism Employment | | | | |
|------------------------------------|----------------|---------------|---------------|----------------|
| | Direct | Indirect | Induced | Total |
| Agriculture, Fishing, Mining | - | 283 | 198 | 481 |
| Construction and Utilities | - | 921 | 311 | 1,233 |
| Manufacturing | - | 1,247 | 522 | 1,769 |
| Wholesale Trade | - | 592 | 892 | 1,484 |
| Air Transport | 1,812 | 16 | 26 | 1,855 |
| Other Transport | 2,194 | 1,485 | 611 | 4,290 |
| Retail Trade | 15,473 | 226 | 4,249 | 19,947 |
| Gasoline Stations | 1,591 | 20 | 292 | 1,903 |
| Communications | - | 1,013 | 422 | 1,435 |
| Finance, Insurance and Real Estate | 3,392 | 4,135 | 4,008 | 11,536 |
| Business Services | 436 | 7,758 | 2,511 | 10,705 |
| Education and Health Care | - | 82 | 6,962 | 7,044 |
| Recreation and Entertainment | 23,532 | 1,234 | 881 | 25,648 |
| Lodging | 31,865 | 43 | 37 | 31,945 |
| Food & Beverage | 45,946 | 2,375 | 4,423 | 52,743 |
| Personal Services | 2,353 | 1,316 | 2,397 | 6,066 |
| Government | - | 925 | 366 | 1,291 |
| TOTAL | 128,594 | 23,672 | 29,108 | 181,374 |

Tourism is an employment intensive industry with particularly high job creation in the restaurant, hotel and recreation sectors. Secondary benefits are realized across the entire economy through the supply chain and incomes as they are spent.

Tourism Employment by Industry

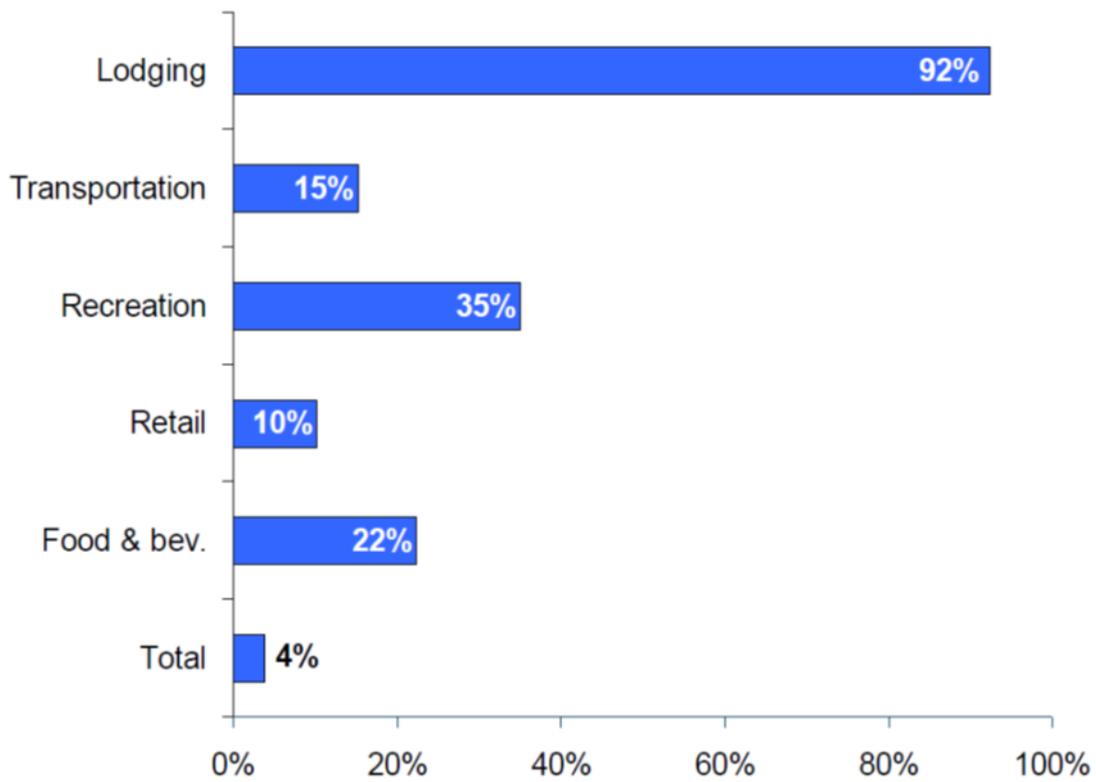


Tourism Employment Intensity

Tourism is a significant part of several industries where employment is supported by tourism spending:

- ◆ 92 percent of lodging
- ◆ 35 percent of recreation
- ◆ 22 percent of food and beverage

Tourism Employment Intensity by Industry



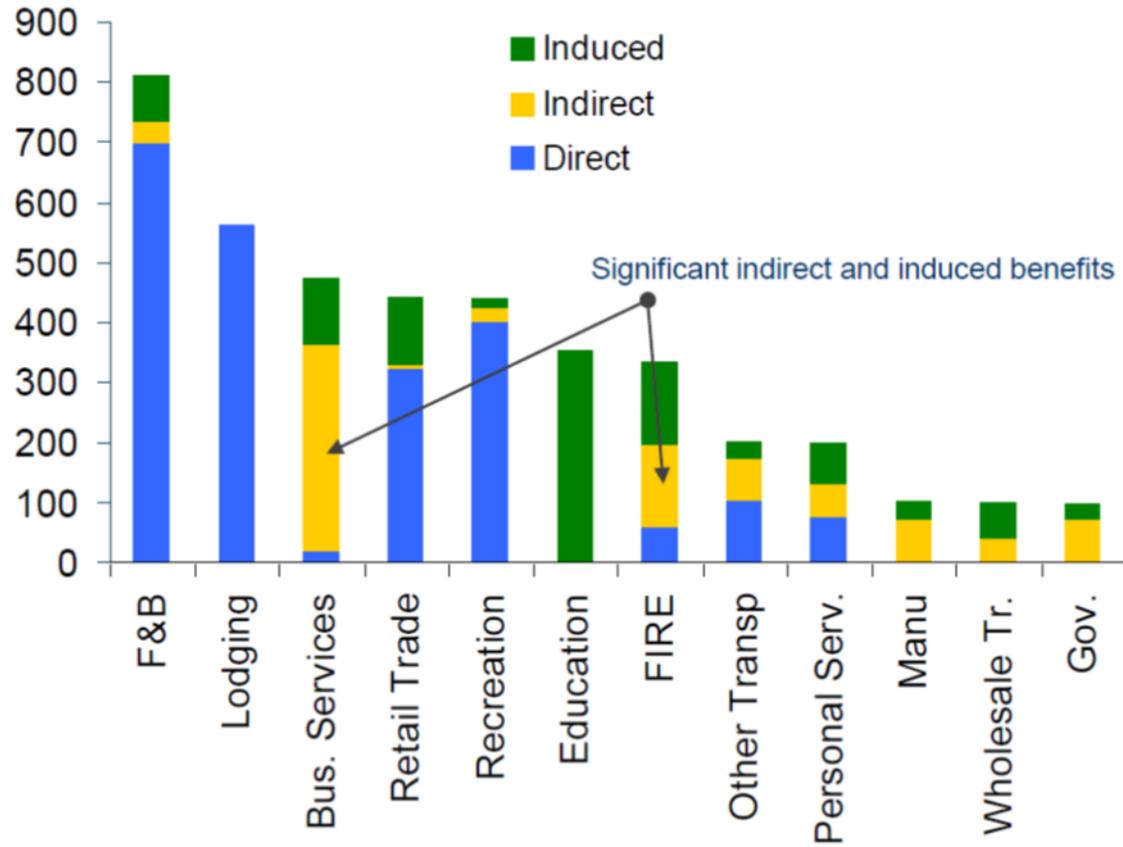
Tourism Personal Income

| Tourism Labor Income (Compensation) | | | | |
|--|----------------|-----------------|----------------|----------------|
| (US\$ Million) | | | | |
| | Direct | Indirect | Induced | Total |
| Agriculture, Fishing, Mining | - | 3.6 | 3.1 | 6.7 |
| Construction and Utilities | - | 66.1 | 23.7 | 89.7 |
| Manufacturing | - | 71.0 | 30.0 | 101.0 |
| Wholesale Trade | - | 39.8 | 59.9 | 99.7 |
| Air Transport | 91.2 | 0.8 | 1.3 | 93.4 |
| Other Transport | 104.8 | 69.1 | 27.2 | 201.1 |
| Retail Trade | 322.7 | 6.2 | 112.6 | 441.5 |
| Gasoline Stations | 38.9 | 0.5 | 7.2 | 46.6 |
| Communications | - | 51.1 | 23.2 | 74.2 |
| Finance, Insurance and Real Estate | 58.2 | 138.1 | 137.8 | 334.1 |
| Business Services | 19.4 | 342.5 | 110.8 | 472.8 |
| Education and Health Care | - | 2.8 | 349.1 | 352.0 |
| Recreation and Entertainment | 400.1 | 22.9 | 14.7 | 437.7 |
| Lodging | 560.8 | 0.6 | 0.5 | 562.0 |
| Food & Beverage | 698.0 | 35.9 | 75.5 | 809.4 |
| Personal Services | 74.9 | 55.3 | 68.7 | 198.8 |
| Government | - | 72.0 | 25.7 | 97.7 |
| TOTAL | 2,369.1 | 978.4 | 1,071.1 | 4,418.5 |

The larger employment numbers in Food and Beverage and Receptions support significant labor income in those industries. Business services and the FIRE (finance insurance and real estate) sectors depend on tourism activity as suppliers to tourism companies and their employees.

Tourism Labor Income by Industry

\$ million



Tourism Tax Generation

\$2.2 billion in taxes were directly and indirectly generated by tourism in 2011. Wisconsin state and local taxes alone generated \$1.3 billion. Each household in Wisconsin would need to be taxed an additional **\$565 per year** to replace the tourism taxes received by state and local governments.

| Traveler Generated Taxes | | |
|---------------------------------------|-----------------------|-----------------------|
| (US\$ Million) | | |
| Tax Type | 2010 | 2011 |
| Federal Taxes Subtotal | <u>917.6</u> | <u>951.7</u> |
| Corporate | 81.9 | 87.4 |
| Indirect Business | 104.8 | 112.0 |
| Personal Income | 212.6 | 218.9 |
| Social Security | 518.2 | 533.5 |
| State and Local Taxes Subtotal | <u>1,202.1</u> | <u>1,270.9</u> |
| Corporate | 113.2 | 120.9 |
| Personal Income | 101.9 | 104.9 |
| Sales | 425.3 | 453.1 |
| Bed | 72.7 | 77.3 |
| Property | 370.9 | 391.7 |
| Excise and Fees | 108.5 | 113.1 |
| State Unemployment | 9.6 | 9.9 |
| TOTAL | 2,119.6 | 2,222.6 |

Quantifying the Tourism Economy

By monitoring tourism’s economic impact, policy makers can make informed decisions regarding the funding and prioritization of tourism development. It can also carefully monitor its successes and future needs. In order to do this, tourism must be measured in the same categories as other economic sectors – for example, tax generation, employment, wages and gross domestic product.

Most economic sectors such as financial services, insurance, or construction are easily defined within a country’s national accounts statistics. Tourism is not so easily measured because it is not a single industry. It is a demand-side activity which affects multiple sectors to various degrees. Tourism also spans nearly a dozen sectors including:

- ◆ Lodging
- ◆ Recreation
- ◆ Retail
- ◆ Real estate
- ◆ Air passenger transportation
- ◆ Food and beverage
- ◆ Car rental
- ◆ Travel agencies

Methods and Data Sources

Domestic visitor expenditure estimates are provided by Longwoods International’s representative survey of US travelers. These are broken out by sectors (lodging, transport at destination, food and beverage, retail and recreation), by purpose (business and leisure), and by length of stay (day and overnight). Longwoods International then adjusts these levels of spending based on a range of know measures of tourism activity:

- ◆ Overseas visitor spending (source: OTTI, TE)
- ◆ Canada visitor spending (source: Statistics Canada, TE)
- ◆ Bed tax receipts
- ◆ Spending on air travel which accrues to all airports and locally-based airlines
- ◆ Gasoline purchases by visitors: TE calculation
- ◆ Smith Travel Research data on hotel revenues
- ◆ Construction value by McGraw-Hill construction
- ◆ Industry data on employment, wages, GDP, and sales (source: BEA, BLS, Census)
- ◆ An IMPLAN model was compiled for the State of Wisconsin. This traces the flow of visitor-related expenditures through the local economy and their effects on employment, wages, and taxes. IMPLAN also quantifies the indirect (supplier) and induced (income) impacts of tourism.

All results are benchmarked and cross-checked and adjusted based on the US Bureau of Labor Statistics and Bureau of Economic Analysis (employment and wages by industry).



APPENDIX C: UPDATED BRAND MANUAL





Guidelines

Identity – Position and Brand Promise

Our Position

Create, support and protect a thousand-mile footpath tracing Ice Age formations across Wisconsin.



Brand Promise

Together with private landowners, businesses, the National Park Service, Wisconsin Department of Natural Resources, local units of government and thousands of volunteers, the Ice Age Trail Alliance works to create, support and protect a thousand-mile footpath tracing Ice Age formations across Wisconsin — the Ice Age National Scenic Trail.





Guidelines

Identity – *Take a walk through time*

Take a walk through time

- ❖ The Ice Age Trail Alliance (IATA) is a non-profit, volunteer- and member-based organization headquartered in Cross Plains, Wisconsin. Its mission is to create, support and protect a thousand-mile footpath tracing Ice Age formations across Wisconsin. More than 3,000 members nationwide support the IATA in the completion of its mission through on-the-ground work and financial gifts.
- ❖ The Ice Age Trail, one of only eleven National Scenic Trails in the United States, is a thousand-mile footpath highlighting Wisconsin's world-renowned Ice Age heritage and scenic beauty.
- ❖ A variety of geological landforms, associated almost exclusively with glaciation, are better seen in Wisconsin than anywhere in the world. These include moraines, eskers, erratics, kettles, drumlins, kames, dells (dalles) and outwash plains.
- ❖ The Ice Age Trail route takes visitors through some of Wisconsin's most scenic terrain, highlighting mature forests, expansive prairies and thousands of lakes and rivers.
- ❖ The Trail is suitable for walking, hiking, backpacking and snowshoeing over a wide range of distances and landscapes. Much of the Trail offers solitude, but occasionally it takes adventurers right down the main streets of charming Wisconsin communities such as Sturgeon Bay, Hartland, Janesville, Lodi and St. Croix Falls. Whether someone is seeking a short stroll over gentle terrain or a multiday deep-woods adventure, there is a segment of the Ice Age Trail for all.

The Ice Age Trail Alliance helps visitors take a walk through time.





Guidelines

Identity – Brand Essence

The Ice Age Trail Alliance Essence – The Ice Age Trail Alliance's identity highlights the emotional connection to Wisconsin's icy past.

Though the work of the glaciers in Wisconsin was completed more than 10,000 years ago, the notion of a hiking trail celebrating the state's Ice Age legacy dates back just a century. The story of the Ice Age Trail is a fascinating mix of vision, conservation and passion involving some of Wisconsin's most famous politicians and thousands of private citizens. Because the Ice Age Trail Alliance was established not long after the idea of the Ice Age Trail itself took shape, their histories are inseparable.

Tone and Personality of the Brand

Adventure

What lies ahead around the next bend? Never the same trip.

Natural

Step into the icy past of Wisconsin and see the beauty of the state.

Peaceful

Serene. Tranquil. Connection to the land. Escape.

Beautiful

Stunning views. Breathtaking experience.





Guidelines

Logo Usage

The Ice Age Trail Alliance's logo should be used on all business and marketing applications. It should maintain its shape and size ratio, and should not be skewed, stretched or altered.



4/c

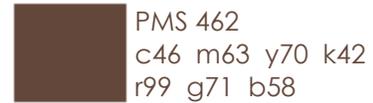
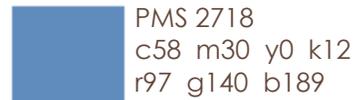


2/c



b/w

Color Logo Breakdown



Typography

Matrix Bold





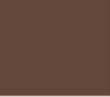
Guidelines

Alternate Logo Usage

When the Ice Age Trail Alliance needs to identify the Trail as a National Scenic Trail, this logo should be used. Use of this alternate logo requires National Park Service approval as the Ice Age Trail Alliance does not retain reproduction rights.



Color Logo Breakdown

| | |
|---|----------------------------------|
|  | c70 m0 y0 k0 r0 g192 b243 |
|  | c25 m0 y0 k0 r185 g229 b251 |
|  | c58 m30 y0 k12 r97 g140 b189 |
|  | c46 m63 y70 k42 r99 g71 b58 |
|  | c0 m22 y40 k24 r200 g164 b127 |

The Ice Age Trail Alliance identifies the Trail with the National Park Service logo inset into a map of Wisconsin. The Executive Director authorizes use of this alternate logo.



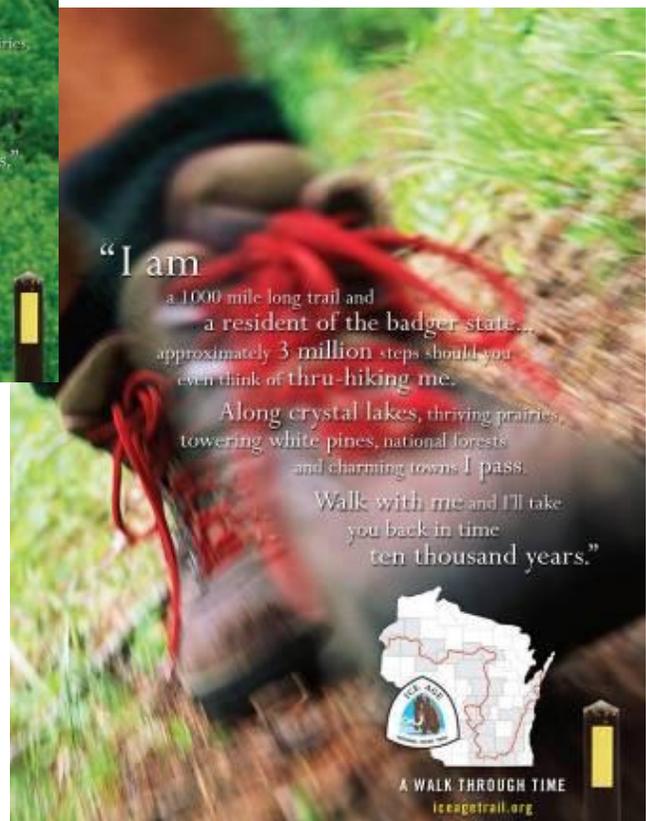
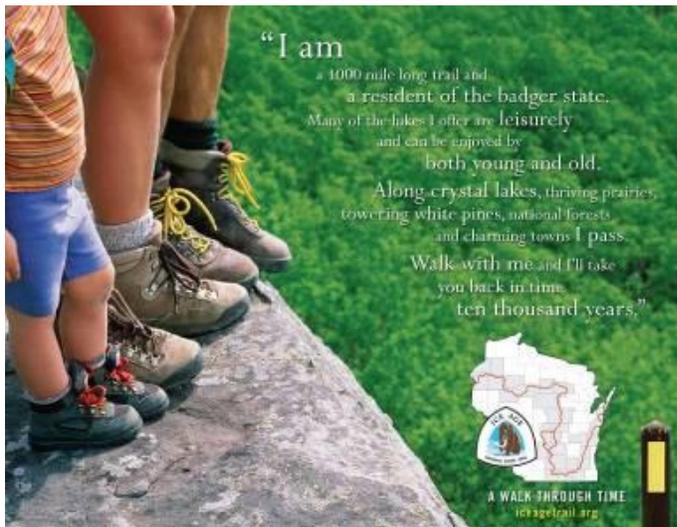


Guidelines

Advertising, Marketing and Communication

Print and Online Advertising

The overall creative of the Ice Age Trail Alliance's advertising should incorporate the look and feel as defined in this document. Strong imagery from the Trail is the key to conveying the emotional tie to the Trail and igniting the onlooker's senses. The end result should not waiver drastically from previous work that delivers an emotional connection to the Trail, as well as a promise to what the people can experience. Examples of work are listed below.





Guidelines

Printed Material and Collateral

The overall look and feel of printed materials should embrace the spirit of the Trail as reflected in previous work. Examples are presented below.





Guidelines

Logo – File Naming

Properly naming a file can help to convey a large amount of information. Understanding the naming convention will help those using the files to better understand the assets.

{a} {b} {c}

IATA-Logo-NST_4C.eps

{a} – “NST” will only be present on logos if it is the National Scenic Trail logo.

{b} – The description immediately following will identify if it is a color or grayscale logo:

4C – Four-color

2C – Two-color

BW – Grayscale

{c} – The last portion of the naming convention is the file formation. This will follow standard file extension protocol. See below for further explanation.

EPS – An EPS file uses ratios to determine specific proportions of an image rather than using exact measurements. This allows an EPS image to be scaled to larger sizes without a loss in image quality. Some drawbacks to using an EPS image are its larger file size and that editing and viewing is limited to graphics programs like Adobe Illustrator and Adobe Photoshop.

PDF – A PDF file can be comprised of many different file formats. For this reason, it is important to know the resolution of the particular PDF you are using. The PDFs provided on this CD are high-resolution and fully scalable, similar to the EPS files.

JPG – A JPG file can be very useful when used properly. A JPG is created using pixels, which means that it cannot be scaled to a larger size. A JPG file compresses the image, which can help when a file size is required. By compressing an image to make it smaller, the JPG is literally throwing away bits of information that in the end leads to image quality loss. So, if a high-quality image is required, a JPG should be avoided. But, a JPG can be very useful when it is used on the web or needs to be sent via email.

PNG – A Portable Network Graphic is a bitmap image format that employs lossless data compression. PNG was created to improve upon and replace GIF (Graphics Interchange Format) as an image-file format. PNG was designed for transferring images on the Internet, not for print graphics, and therefore does not support non-RGB color spaces such as CMYK.



Logo – Color Information

| ESP and PDF | | |
|---|--|--|
| <p><u>Four-Color Process</u> IATA-Logo-4C</p> | | <p>Use this logo when four-color process printing will be used to reproduce a document. Any document containing full-color photographs should be printed in four-color process printing.</p> |
| <p><u>Two-Color Process</u> IATA-Logo-2C</p> | | <p>Use this logo when printing is only permitted in two colors.</p> |
| <p><u>One-Color Grayscale</u> IATA-Logo-BW</p> | | <p>This logo is to be used when black is the only available color selection.</p> |
| JPG & PNG | | |
| <p><u>Full-Color</u> IATA-Logo-4C <u>Two-Color</u> IATA-Logo-2C <u>One-Color</u> IATA-Logo-BW</p> | | <p>Use these logos for all PowerPoint, Microsoft Word and web-based applications.</p> |



APPENDIX D: ONLINE SURVEY OF IATA DATABASE



Ice Age Trail Alliance

1. Have you used the Ice Age Trail within the last two years?

- Yes
 No

2. [If yes] Select the TOP 5 following activities that best reflects your experience on the Ice Age Trail:

- | | | |
|--|---|--|
| <input type="checkbox"/> Backpacking | <input type="checkbox"/> Fishing | <input type="checkbox"/> Recreational activities |
| <input type="checkbox"/> Bird Watching | <input type="checkbox"/> Friendliness | <input type="checkbox"/> Relaxing |
| <input type="checkbox"/> Camping | <input type="checkbox"/> Hiking | <input type="checkbox"/> Shopping |
| <input type="checkbox"/> Cross-Country Skiing | <input type="checkbox"/> Local Events | <input type="checkbox"/> Snowshoeing |
| <input type="checkbox"/> Deep Woods Adventures | <input type="checkbox"/> Mobile Skills Works Events | <input type="checkbox"/> Sports |
| <input type="checkbox"/> Dining | <input type="checkbox"/> Natural Beauty of the Region | <input type="checkbox"/> Trail Running |
| <input type="checkbox"/> Eco-Tourism | <input type="checkbox"/> Nature Reserves | <input type="checkbox"/> Walking |
| <input type="checkbox"/> Farmer's Markets | <input type="checkbox"/> Outdoor Activities | <input type="checkbox"/> Wildlife |

Other (please specify)

3. What city or cities did you visit along the Ice Age Trail?

4. What were your favorite activities or venues?

5. What were your LEAST favorite activities or venues? Why?

6. What is the one thing about the Ice Age Trail that is the most memorable to you?

Ice Age Trail Alliance

7. Please fill in the blank for the following statement:

If only the Ice Age Trail had _____, I would plan a leisure trip there.

8. When you think of the Ice Age Trail, which activities come to mind?

- | | | |
|--|---|--|
| <input type="checkbox"/> Backpacking | <input type="checkbox"/> Fishing | <input type="checkbox"/> Recreational activities |
| <input type="checkbox"/> Bird Watching | <input type="checkbox"/> Friendliness | <input type="checkbox"/> Relaxing |
| <input type="checkbox"/> Camping | <input type="checkbox"/> Hiking | <input type="checkbox"/> Snowshoeing |
| <input type="checkbox"/> Cross Country Skiing | <input type="checkbox"/> Local Events | <input type="checkbox"/> Trail Running |
| <input type="checkbox"/> Deep Woods Adventures | <input type="checkbox"/> Mobile Skills Work Events | <input type="checkbox"/> Walking |
| <input type="checkbox"/> Dining | <input type="checkbox"/> Natural Beauty of the Region | <input type="checkbox"/> Wildlife |
| <input type="checkbox"/> Eco-Tourism | <input type="checkbox"/> Nature Reserves | <input type="checkbox"/> Sports |
| <input type="checkbox"/> Farmer's Markets | <input type="checkbox"/> Outdoor Activities | |

Other (please specify)

9. When you think of the Ice Age Trail, which of these terms come to mind?

- | | | |
|--|--|--|
| <input type="checkbox"/> Adventurous | <input type="checkbox"/> Small towns | <input type="checkbox"/> Bird Watching |
| <input type="checkbox"/> Beautiful natural landscape | <input type="checkbox"/> Sports | <input type="checkbox"/> Snowshoeing |
| <input type="checkbox"/> Comfortable | <input type="checkbox"/> Unwelcoming | <input type="checkbox"/> Cross-Country Skiing |
| <input type="checkbox"/> Friendly | <input type="checkbox"/> Welcoming | <input type="checkbox"/> Deep Woods Adventures |
| <input type="checkbox"/> Natural wildlife | <input type="checkbox"/> Walking | <input type="checkbox"/> Geological Formations |
| <input type="checkbox"/> Peaceful | <input type="checkbox"/> Hiking | <input type="checkbox"/> Local Events |
| <input type="checkbox"/> Quality of life | <input type="checkbox"/> Backpacking | <input type="checkbox"/> Mobile Skills Work Events |
| <input type="checkbox"/> Relaxing | <input type="checkbox"/> Trail Running | <input type="checkbox"/> Eco-Tourism |

Other (please specify)

10. Do you remembering seeing any advertising for the Ice Age Trail either in print or online?

- Yes
- No

Ice Age Trail Alliance

11. [If yes] What did you see?

12. [If yes] Where did you see it?

13. Are you planning to take a leisure trip in the next year?

- Yes
 No

14. Will this be a family trip?

- Yes
 No

15. How long will the trip be?

Days

Nights

16. How long do you plan on staying along the Ice Age Trail?

Days

Nights

17. When traveling, what is your lodging preference?

- Resort
 Hotel/Motel
 Bed & Breakfast
 Campground
 RV Park

Other (please specify)

Ice Age Trail Alliance

18. How many people of each age range will be part of your next trip?

| | |
|----------------------|----------------------|
| Adults 61+ | <input type="text"/> |
| Adults 46-60 | <input type="text"/> |
| Adults 31-45 | <input type="text"/> |
| Adults 18-30 | <input type="text"/> |
| Children 13-17 | <input type="text"/> |
| Children 6-12 | <input type="text"/> |
| Children 5 and Under | <input type="text"/> |

19. In planning your next leisure trip, which of these statements regarding travel distance is closest to your feelings?

- Travel distance doesn't matter
- The most I'm willing to travel less than 50 miles
- The most I'm willing to travel is 50 - 100 miles
- The most I'm willing to travel is 100 miles or more

20. Which means of transportation do you most prefer for leisure travel?

- Driving
- Flying
- Bus Tour

Other (please specify)

21. How do you decide where to travel?

- | | |
|--|--|
| <input type="checkbox"/> Family/Friend Recommendations | <input type="checkbox"/> Travel Blogs |
| <input type="checkbox"/> Travel Articles | <input type="checkbox"/> Social Media |
| <input type="checkbox"/> Advertising | <input type="checkbox"/> Online Research |

Other (please specify)

22. Which statement best describes your travel style?

- I'm always looking for somewhere new to visit
- I keep going back to vacation spots I know I'll like
- My vacations are often tied to business or family functions

Ice Age Trail Alliance

23. When you travel, do you usually:

- Research travel information Online
- Check Local chamber/tourism website
- Get tips from lodging staff
- Request literature from chamber/tourism agency
- Seek out area tourism office
- Gain 'Word of mouth' recommendations

24. How do you prefer to book your trip?

- I book everything on my own
- Travel Wisconsin website
- Through a national web site
- Through a local travel agency
- Using Social Media
- With help fro the local Chamber or tourism agency
- Through Automobile Association of America

25. Have you used any of these online services to plan your leisure trips?

- | | |
|--|----------------------------------|
| <input type="checkbox"/> Directly from hotel site | <input type="checkbox"/> Firefox |
| <input type="checkbox"/> Automobile Association of America (AAA) | <input type="checkbox"/> Google |
| <input type="checkbox"/> Bing | <input type="checkbox"/> Orbitz |
| <input type="checkbox"/> Expedia | <input type="checkbox"/> Safari |

26. What is you annual household income?

- \$25,000 and under
- \$26-\$50,000
- \$51-\$75,000
- \$76-\$100,000
- \$101,000 - \$125,000
- \$125,000 - \$150,000
- Over \$150,000

27. In what city is your permanent address?



APPENDIX E: FIELD SURVEY OF ICE AGE TRAIL USERS



Trail Users

Part 1: Trail Usage

1. What is your primary reason for your trip to this area?

- To use this trail and other trails in the area
- To attend a special event/festival
- On a leisure trip in the area
- On a business meeting in the area
- Nature based activities (birding, wildlife, natural beauty, etc.)
- Being outdoors
- You live in the area

Other (please specify)

2. Why are you using this trail?

- | | |
|--|---|
| <input type="checkbox"/> Enjoying Nature | <input type="checkbox"/> Camping |
| <input type="checkbox"/> Exercise/Wellness/Fitness | <input type="checkbox"/> Special Events |
| <input type="checkbox"/> Hiking (climbing/backpacking the trail) | <input type="checkbox"/> Observing Geographic Landscape |
| <input type="checkbox"/> Trail Running/Jogging | <input type="checkbox"/> Dog Walking |
| <input type="checkbox"/> Access to Silent Sports (hiking, fishing, birding, paddle sports) | |

Other (please specify)

3. In which city or access point did you enter this trail? (For Example: Waupaca)

4. Have you used this trail before?

- Yes No (skip to question 6)

5. How many times have you used this trail in the past 12 months?

Trail Users

6. What activities have you participated in or plan to participate in on this trail?

- | | | |
|--------------------------------------|----------------------------------|-------------------------------------|
| <input type="checkbox"/> Hiking | <input type="checkbox"/> Birding | <input type="checkbox"/> Geocaching |
| <input type="checkbox"/> Biking | <input type="checkbox"/> Hunting | |
| <input type="checkbox"/> Snowshoeing | <input type="checkbox"/> Fishing | |

Other (please specify)

7. Are you staying overnight on this trip?

- Yes (skip to question 9) No

8. If you were to stay overnight along the trail, which form of lodging would you use?

- | | | |
|------------------------------------|---------------------------------------|---------------------------------------|
| <input type="radio"/> RV Camping | <input type="radio"/> Hotel/Motel | <input type="radio"/> Friend/Relative |
| <input type="radio"/> Tent Camping | <input type="radio"/> Bed & Breakfast | |

Other (please specify)

Skip to Question 12

9. What type of lodging are you staying in?

- | | |
|--|---|
| <input type="radio"/> Hotel/Motel | <input type="radio"/> Bed and Breakfast |
| <input type="radio"/> Friend/Relative's Home | <input type="radio"/> Campsite |

Other (please specify)

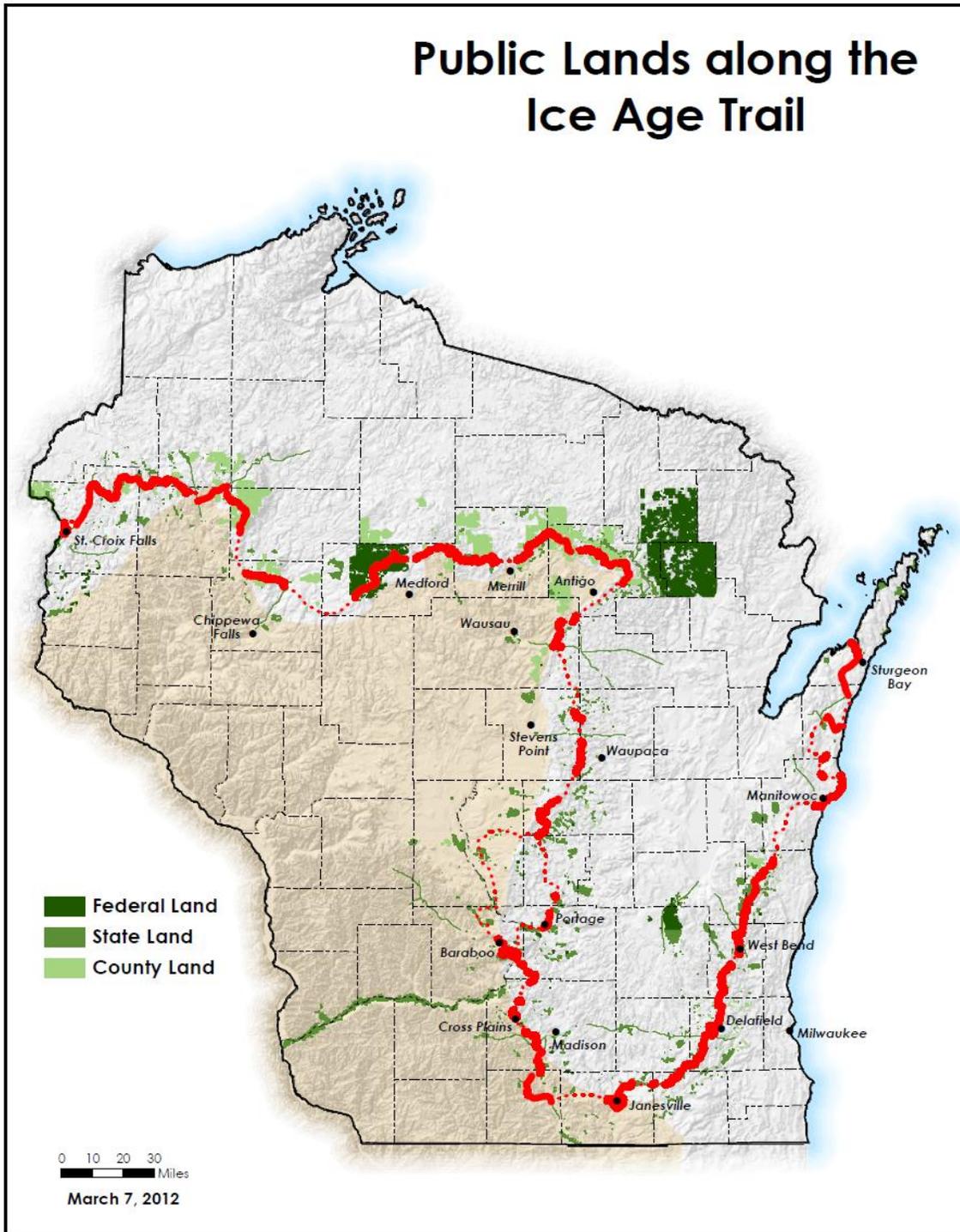
10. In what town are you staying?

11. How many nights are you staying?

12. What other segments of the Ice Age Trail have you experienced?

- Highlight on map

Map



Trail Users

13. What attributes come to mind when you think of the Ice Age Trail?

- | | | |
|---|--------------------------------------|-----------------------------------|
| <input type="checkbox"/> Adventurous | <input type="checkbox"/> Gem | <input type="checkbox"/> Peaceful |
| <input type="checkbox"/> Beautiful Scenery | <input type="checkbox"/> Getaway | <input type="checkbox"/> Quiet |
| <input type="checkbox"/> Breathtaking Country | <input type="checkbox"/> Hilly | <input type="checkbox"/> Relaxing |
| <input type="checkbox"/> Exciting | <input type="checkbox"/> Interesting | <input type="checkbox"/> Scenic |
| <input type="checkbox"/> Friendly | <input type="checkbox"/> Natural | <input type="checkbox"/> Serene |

Other (please specify)

14. What other activities will you or members of your immediate travel groups participate in while on this trip?

- | | |
|---|--|
| <input type="checkbox"/> Shopping | <input type="checkbox"/> Visiting family/friends |
| <input type="checkbox"/> Museums/Historic Sites | <input type="checkbox"/> Festivals/Area Events (Racing, Paddling Events) |
| <input type="checkbox"/> Dining | <input type="checkbox"/> Casinos |
| <input type="checkbox"/> Area Attractions (farmers markets, breweries, wineries, local foods) | <input type="checkbox"/> Silent Sports (hiking, biking, canoeing, camping) |

Other (please specify)

15. Please estimate how much you have spent or plan to spend in total on this trip in each of these categories:

- | | |
|--|----------------------|
| Lodging/Overnight accommodations | <input type="text"/> |
| Food & Drink at local restaurants/bars | <input type="text"/> |
| Area entertainment/Attractions (Admission Fees) | <input type="text"/> |
| Grocery/Convenient store shopping | <input type="text"/> |
| Shopping (Souvenirs, Clothing, Gifts, etc.) | <input type="text"/> |
| Gaming (casinos/slot machines) | <input type="text"/> |
| Gas/Travel Expenses | <input type="text"/> |
| Other leisure spending (Rental of bikes, canoes, kayaks, etc.) | <input type="text"/> |

16. How did you find out about this trail?

- | | | |
|---|--|---|
| <input type="checkbox"/> Family/Friends | <input type="checkbox"/> TV/Radio | <input type="checkbox"/> State Tourism Publication/Magazine |
| <input type="checkbox"/> Internet | <input type="checkbox"/> Visitors Center | <input type="checkbox"/> Brochure/Flier/Newspaper |

Other (please specify)

Trail Users

17. How did you find information about the facilities (hotels, restaurants, etc.) along the trail?

Family/Friends

TV/Radio

State Tourism

Internet

Visitors Center

Publication/Magazine

Brochure/Flier/Newspaper

Other (please specify)

18. In your opinion, what should the Ice Age Trail Alliance focus on as it works to enhance visitor experiences along the trail?

Trail Users

Demographic Information

19. What is your gender?

Male

Female

20. What is your age?

21. How many people are traveling in your party?

22. What is your highest level of education?

High school

Associates Degree

Masters Degree or Higher

Some College (no degree)

Bachelors Degree

23. What is your estimated annual household income?

Less than \$40,000

\$40,000-\$59,999

\$60,000-\$79,999

\$80,000-\$99,999

\$100,000-\$119,999

\$120,000 +

24. What is the zipcode of your primary residence?



APPENDIX F: MAIL SURVEYS TO RESTAURANTS, HOTELS AND CONVENIENCE STORES



Convenience Store Survey

Introduction

[Insert Date]

RE: Ice Age Trail Convenience Store

Dear Store Employee:

I am inviting you to participate in completing the attached survey regarding many important issues facing the Ice Age Trail and surrounding businesses. Along with this letter is a short questionnaire that asks a variety of questions about your establishment. Because of the close proximity to the Ice Age National Scenic Trail, your establishment is a key influence on trail users. The purpose of this survey is to evaluate what the Ice Age Trail and its local communities can do to attract trail participants to this area. Please take a few minutes to complete this survey. It is very important in planning the future of the trail in this area.

Your participation in completing this survey will provide information to help clarify the relationship between trail users' interests and the availability of resources. The information collected is only as good as what you share with us; please answer each question as accurately as possible. It is crucial that as many establishments as possible complete the questionnaire. The results of this project will assist your community in making many important decisions for the future.

The survey should take you less than 10 minutes to complete, and you may return it in the business reply envelope. Every effort will be made to safeguard your identity and any information you provide from unauthorized access. If you have any questions or concerns about completing the survey, you may contact The Fiscal & Economic Research Center at (262) 472-1355, as they are administering the survey and results. If you have any questions regarding your participation in the survey please contact the Office of Research and Sponsored Programs at (262) 472-5212.

Thank you in advance for your participation, as the direction of the community affects everyone.

Respectfully,

Russ Kashian, PhD
Director, Fiscal and Economic Research Center
800 W Main Street
Whitewater, WI 53190
262-472-1355

Convenience Store Survey

Trail Information

1. Are you aware of the Ice Age National Scenic Trail?

Yes

No

2. On an average day, what percent of customers are trail users?

Percent

3. Does your store market to trail users?

Yes

No

4. If your store does market to trail users, what forms are used? (Choose all the apply)

TV/Radio Ads

Messages Along the Trail

Outdoor/Hiking Publications

Billboards

Internet

Promotional Discounts

Other (please specify)

5. Does your store sell any of the following trail supplies? (Choose all that apply)

Beverages

Camping Gear

Batteries

Snacks

Sleeping Bags

First Aid Kits

Firewood

Rain Jackets/Ponchos

Flashlights

Water Bottles

Other (please specify)

Convenience Store Survey

Store Information

6. What is the name of your store? (Optional)

7. What is your position in the store?

8. In what town/city is your store located?

Zip Code

9. How many years has your store been operating?

Years

10. On an average day, approximately how many people visit your store?

People

11. Other Comments:

Ice Age Trail Hotel

Introduction

[Insert Date]

RE: Ice Age Trail Hotel

Dear Hotel Employee:

I am inviting you to participate in completing the attached survey regarding many important issues facing the Ice Age Trail and surrounding businesses. Along with this letter is a short questionnaire that asks a variety of questions about your establishment. Because of the close proximity to the Ice Age National Scenic Trail, your establishment is a key influence on trail users. The purpose of this survey is to evaluate what the Ice Age Trail and its local communities can do to attract trail participants to this area. Please take a few minutes to complete this survey. It is very important in planning the future of the trail in this area.

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Thank you in advance for your participation, as the direction of the community affects everyone.

Respectfully,

Russ Kashian, PhD
Director, Fiscal and Economic Research Center
800 W Main Street
Whitewater, WI 53190
262-472-1355

Ice Age Trail Hotel

Trail Information

1. Are you aware of the Ice Age National Scenic Trail?

Yes

No

2. During each season, approximately what percent of your occupancy is generated by trail users?

Summer

Fall

Winter

Spring

3. How many nights does the average trail user stay in your hotel on a single visit?

Nights

4. Does your hotel market to trail users?

Yes

No

5. If your hotel does market to trail users, what forms are used? (Choose all that apply)

TV/Radio Ads

Internet

Billboards

Outdoor/Hiking Publications

Messages Along the Trail

Promotional Discounts

Other (please specify)

6. Would you be willing to offer a promotional discount to trail users?

Yes

No

Ice Age Trail Hotel

Hotel Information

7. What is the name of your hotel? (Optional)

8. What is your position in at the hotel?

9. In what town/city is your hotel located?

Zip Code

10. How many years has your hotel been open?

Years

11. Which of the following best describes your establishment?

Hotel

Motel

Bed and Breakfast

Other (please specify)

12. How many rooms does your hotel have?

Queen

Double

Suites

Other

13. During each of the following seasons, what is your hotel's average occupancy rate?

Summer

Fall

Winter

Spring

14. Other Comments:

Ice Age Trail Restaurant

Introduction

[Insert Date]

RE: Ice Age Trail Restaurant

Dear Restaurant Employee:

I am inviting you to participate in completing the attached survey regarding many important issues facing the Ice Age Trail and surrounding businesses. Along with this letter is a short questionnaire that asks a variety of questions about your establishment. Because of the close proximity to the Ice Age National Scenic Trail, your establishment is a key influence on trail users. The purpose of this survey is to evaluate what the Ice Age Trail and its local communities can do to attract trail participants to this area. Please take a few minutes to complete this survey. It is very important in planning the future of the trail in this area.

Your participation in completing this survey will provide information to help clarify the relationship between trail users' interests and the availability of resources. The information collected is only as good as what you share with us; please answer each question as accurately as possible. It is crucial that as many establishments as possible complete the questionnaire. The results of this project will assist your community in making many important decisions for the future.

The survey should take you less than 10 minutes to complete, and you may return it in the business reply envelope. Every effort will be made to safeguard your identity and any information you provide from unauthorized access. If you have any questions or concerns about completing the survey, you may contact The Fiscal & Economic Research Center at (262) 472-1855, as they are administering the survey and results. If you have any questions regarding your participation in the survey please contact the Office of Research and Sponsored Programs at (262) 472-6212.

Thank you in advance for your participation, as the direction of the community affects everyone.

Respectfully,

Russ Kashian, PhD
Director, Fiscal and Economic Research Center
800 W Main Street
Whitewater, WI 53190
262-472-1855

Ice Age Trail Restaurant

Trail Information

1. Approximately how many miles is your restaurant from the Ice Age National Scenic Trail?

2. During each meal, what percent of your customers is generated by trail users on the average weekday (Monday – Friday)?

Breakfast

Lunch

Dinner

3. During each meal, what percent of your customers is generated by trail users on the average weekend (Saturday or Sunday)?

Breakfast

Lunch

Dinner

4. Does your restaurant market to trail users?

Yes

No

6. If your restaurant does market to trail users, what forms are used? (Choose all that apply)

TV/Radio Ads

Messages Along the Trail

Outdoor/Hiking Publications

Billboards

Internet

Promotional Discounts

Other (please specify)

Ice Age Trail Restaurant

Restaurant Information

6. What is the name of your restaurant? (Optional)

7. What is your position in the restaurant?

8. In what town/city is your restaurant located?

Zip Code

9. How many years has your restaurant been operating?

Years

10. How many people can your restaurant seat at one time?

People

11. Which of the following most closely describes your cuisine?

Family Dining

Supper Club

Local/Regional Food

Fast Food

Ethnic

Other (please specify)

12. During each meal, approximately how many people does your restaurant serve on an average weekday (Monday - Friday)?

Breakfast

Lunch

Dinner

13. During each meal, approximately how many people do you serve on an average weekend (Saturday or Sunday)?

Breakfast

Lunch

Dinner

14. Other Comments:

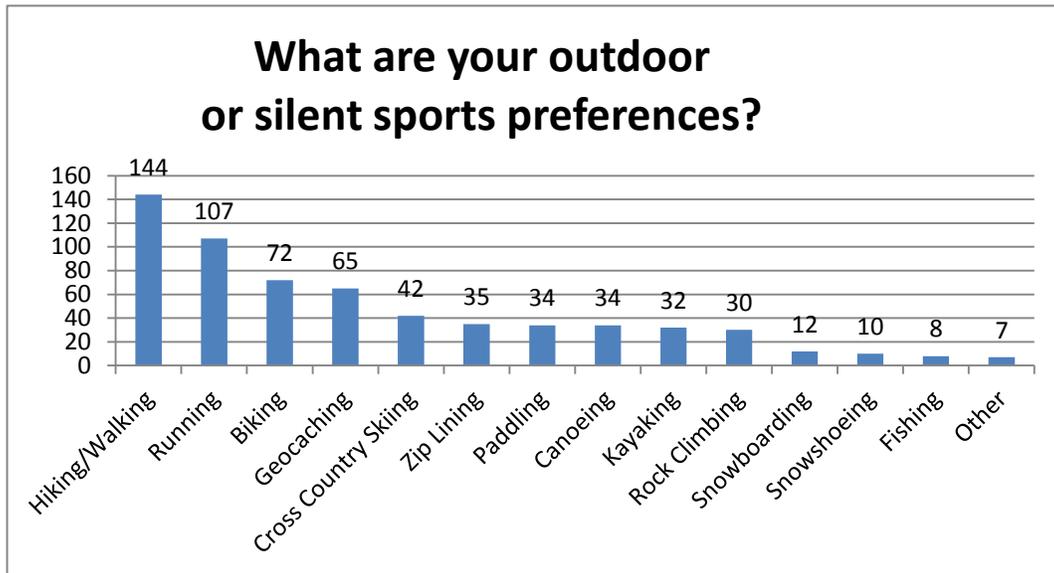


APPENDIX G: THE ECONOMIC IMPACT OF SILENT SPORTS SURVEY – WISCONSIN, MAY 2011

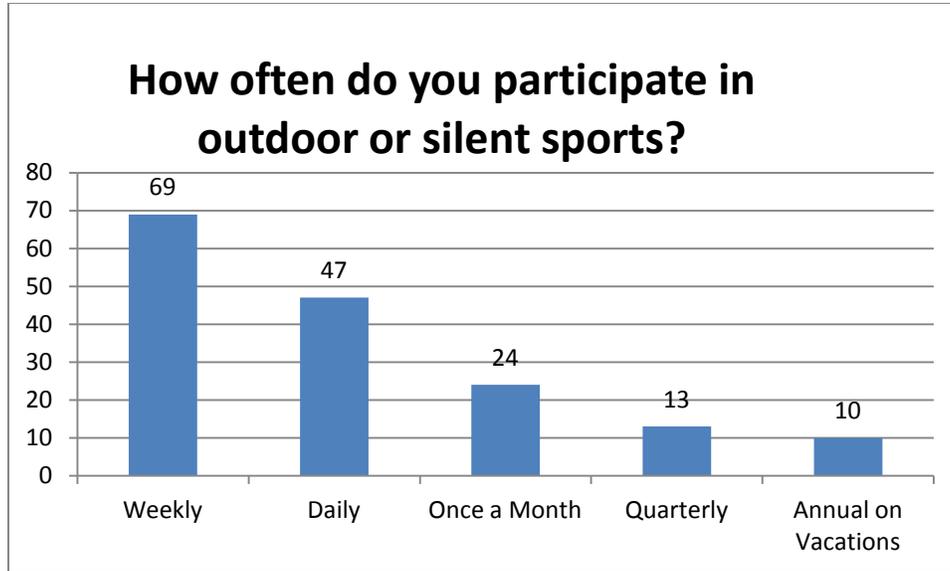


OUTDOOR RECREATION AND SILENT SPORTS SURVEY 2011

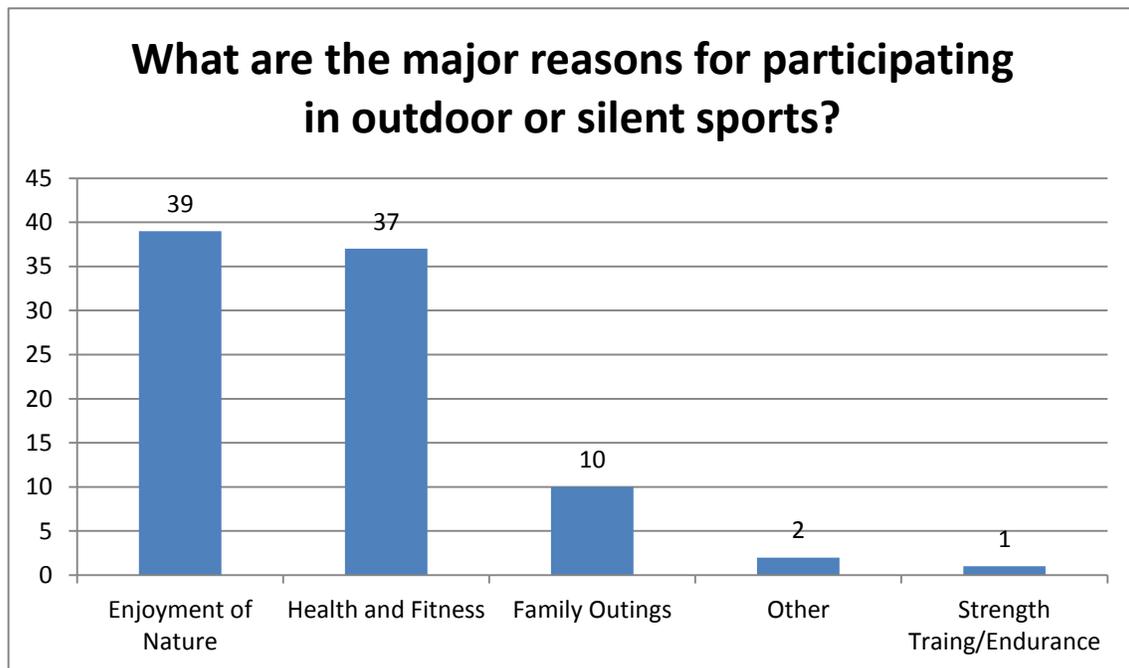
Of the respondents surveyed, the most popular silent sports include: Hiking/Walking (86 percent), Running (64 percent), Biking (43 percent), Geocaching (39 percent), Cross-country Skiing (25 percent), Zip Lining (21 percent), Paddling and Canoeing (20 percent), Kayaking (19 percent), Rock Climbing (18 percent), Snowboarding (7 percent), Snowshoeing (6 percent), Fishing (5 percent) and all other (4 percent). Many silent sport enthusiasts participate in multiple sports depending on the time of year.



Most silent sports participants enjoy these activities on a regular basis; 71.2 percent are involved in silent sports on a weekly or daily basis and are highly motivated and committed.

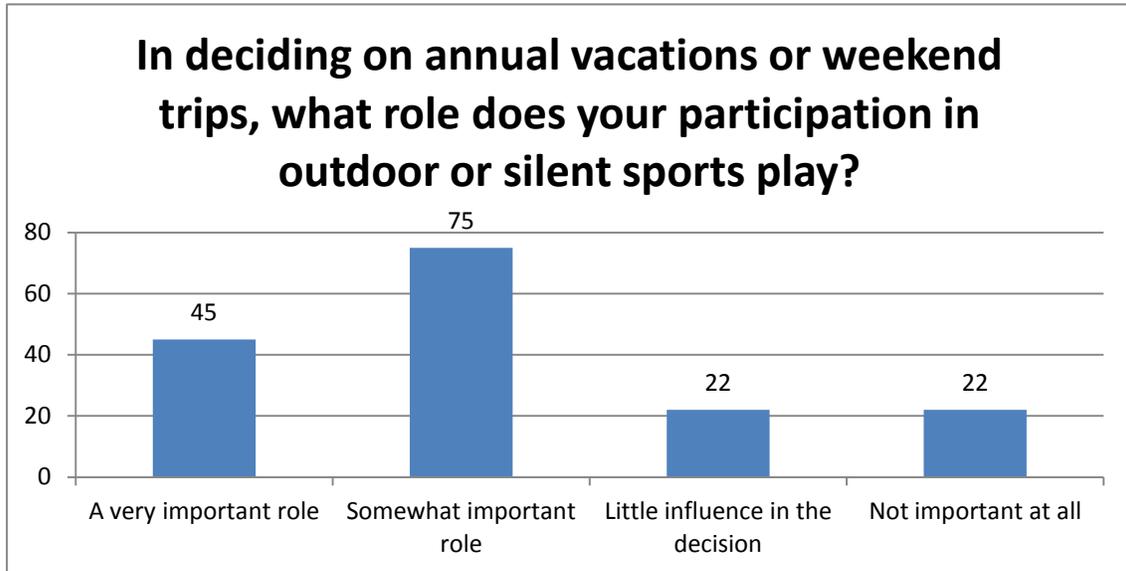


Participants all have different reasons for participating in silent sports. Some of the most common motivations are enjoyment of nature (23 percent), health and fitness (22 percent) and family outings (6 percent).

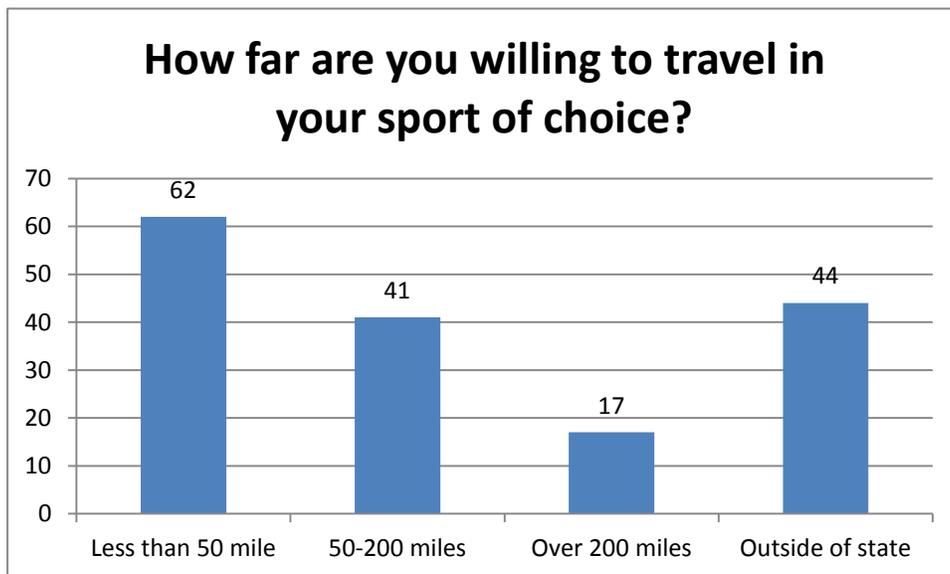


According to survey respondents, 39 percent have participated in a silent sport/event in the last two years and an additional 5 percent are hoping to participate in the future.

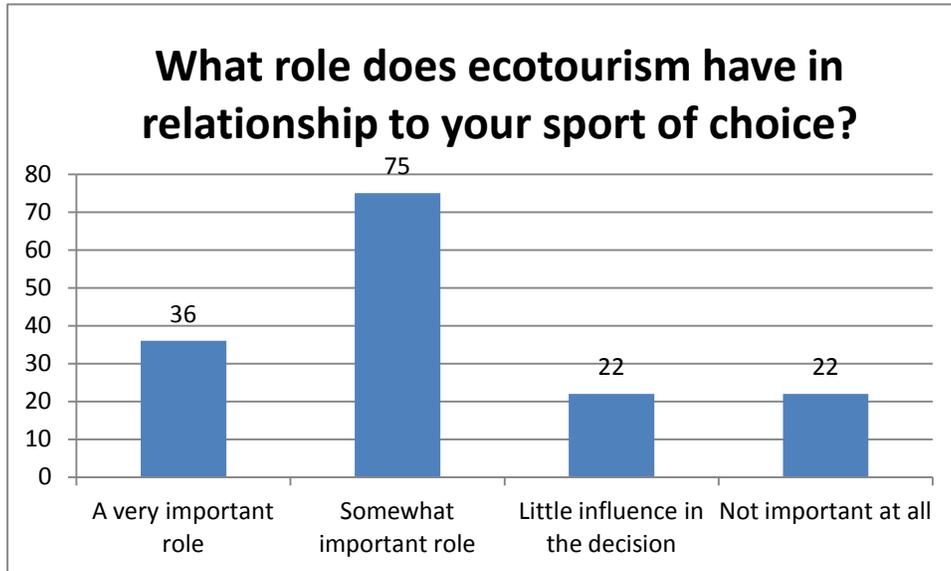
When planning annual vacations or weekend trips, 73.2 percent of respondents claimed that silent sports play a very important or somewhat important role in their choices. Most silent sport participants choose their annual vacation plans/destinations based on their silent sport/preferences.



Silent sports participants are willing to travel to enjoy these sports as well. When asked how far would they be willing to travel to participate in a silent sport of their choice, 40 percent were willing to travel 50 miles or less to their silent sport destination, 25 percent were willing to travel 50 – 200 miles, 10 percent were willing to travel over 200 miles, and 26 percent were willing to travel to another state to participate in their Silent Sport of choice.



When respondents were asked what role ‘ecotourism’ plays in their decision to travel to a silent sport destination, (66 percent) said it was either very important or somewhat important in making their travel decision/plans.

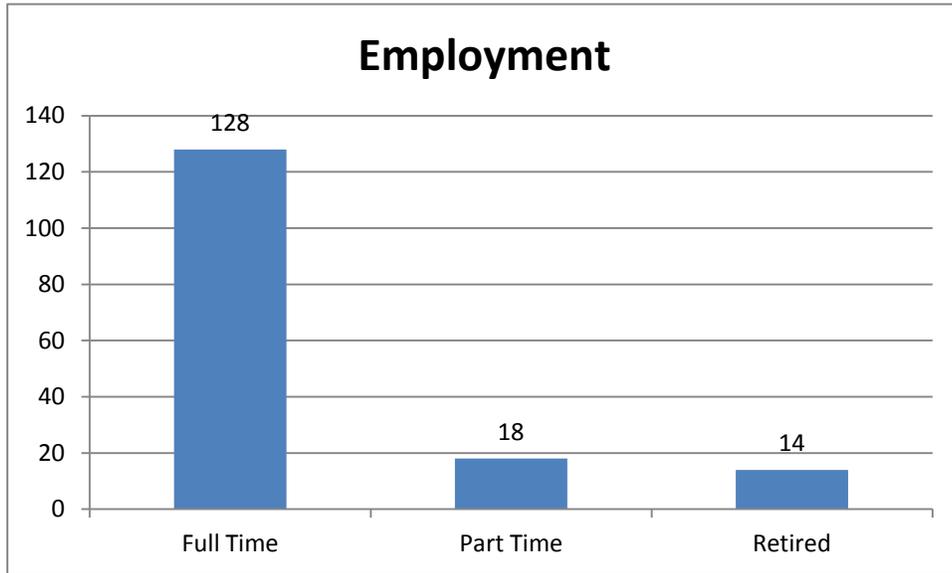


Of the respondents surveyed, 65 percent were male and 35 percent were female. 78 percent of the respondents were between the ages of 40 – 59, skewing toward a more mature audience. The age and gender break distribution is as follows:

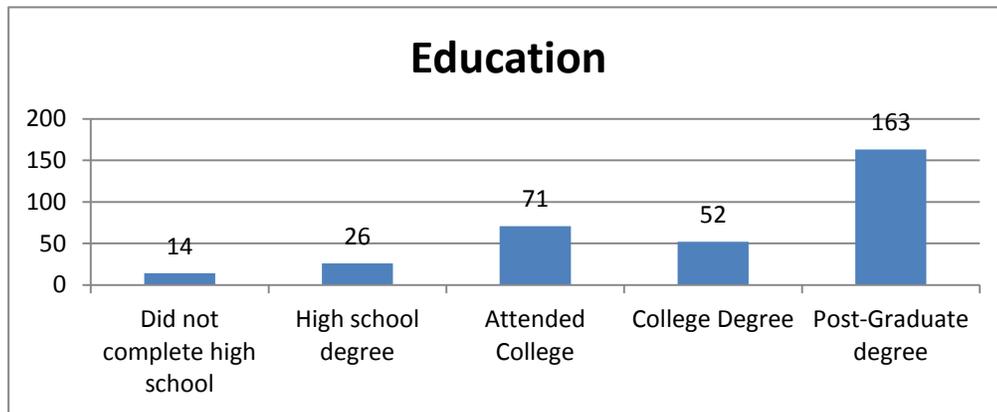
| GENDER | Male | Female |
|--------------|------------|-----------|
| Under 30 | 4 | 3 |
| 30-39 | 14 | 12 |
| 40-49 | 39 | 13 |
| 50-59 | 49 | 30 |
| 60+ | 3 | 1 |
| TOTAL | 109 | 59 |

While most people (70 percent) who enjoy silent sports consider themselves only to be a casual participant, this survey has shown that silent sports still play a significant role in their lives. The target demographic identified, persons in their 40’s and 50’s, are an attractive clientele willing to travel for their hobby/entertainment. The next section of this study discusses the impact Silent Sports participants have on local economies through their expenditures.

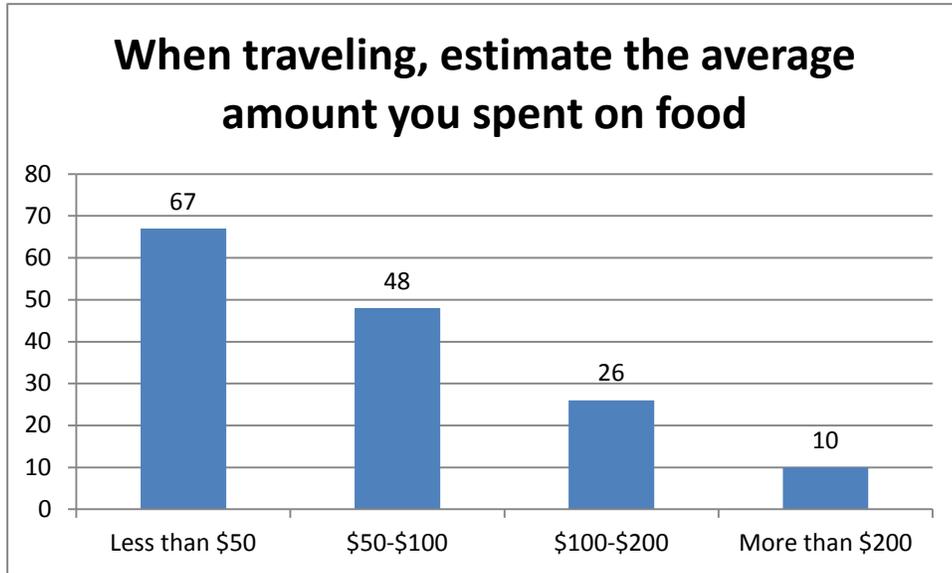
Of the respondents surveyed, 70.8% were married. Another 76.2 percent were employed full time and indicated that they use silent sports as an opportunity to enjoy nature, to alleviate stress, to enjoy the health benefits, and for quality family outings. Only 8.3 percent of the respondents surveyed were retired.



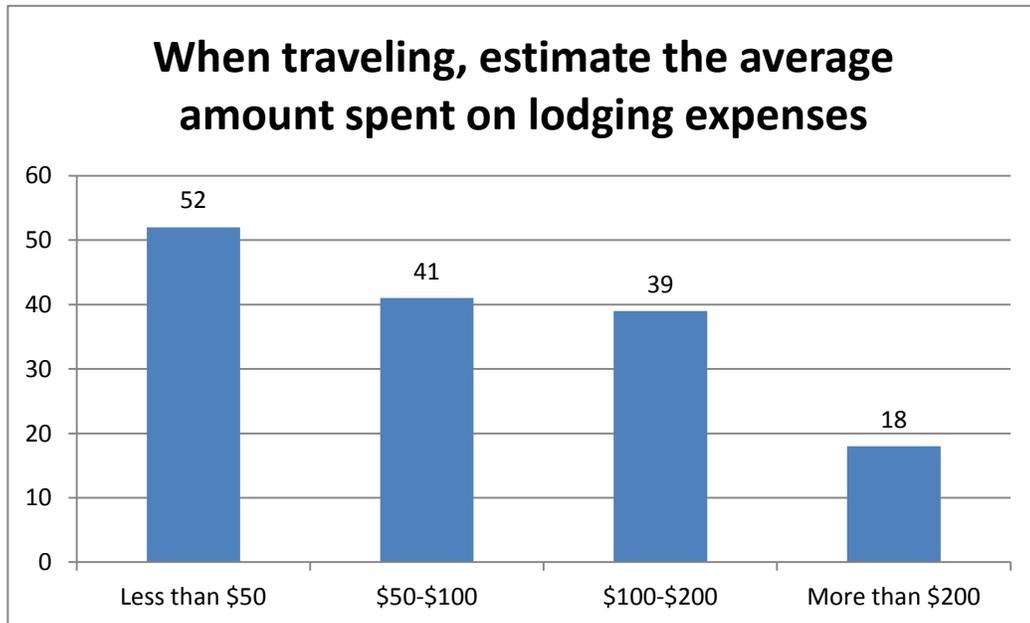
Approximately 8.3 percent of the users surveyed held a high school diploma or a two-year degree. An additional 57.8 attended or graduated from college and 31 percent held their master’s degree.



Respondents had a median rate of income between \$60,000 - \$79,999. It is important to note the spending patterns of the silent sports enthusiasts before, during, and after planned excursions. Of those surveyed, a total of 67 percent spent money on refreshments, meals and snacks that totaled \$50 or less per day, 48 percent spent \$50 – 100 per day for food and 26 percent spent between \$100-200 per day for meals. These expenditures were to restaurants, grocery stores and local merchants.



Silent sport enthusiasts also spend money on overnight lodging when appropriate. Thirty-one percent spent \$50 or less on overnight lodging, 24 percent spent \$50 – 100 per night and 23 percent spent \$100 – 200 per night and 11 percent paid over \$200 per night for lodging.





APPENDIX H: IATA'S INN STYLE DIRECTORY



THE IATA INN STYLE DIRECTORY

A dose of Midwestern hospitality is unsurpassed for providing comfort to weary travelers. After a day of exploring the Ice Age Trail, what better way to reward yourself than by relaxing at a cozy B&B, inn or cottage?

The establishments listed below are located on or near the Trail's route and proudly consider themselves Friends of the Ice Age Trail. With advance reservations, some innkeepers may even be willing to help shuttle you between their establishment and a local Ice Age Trail segment for a gratuity.

Our partner innkeepers invite you to relax, put your feet up and enjoy your overnight in style.

Businesses arranged from east to west along the route of the Ice Age Trail:

| B&B | City | Phone |
|------------------------------|---------------|------------------------------|
| Black Walnut Guest House | Sturgeon Bay | 877-255-9568 |
| White Lace Inn | Sturgeon Bay | 877-948-5223 |
| Red Forest B&B | Two Rivers | 888-250-2272 |
| WestPort B&B | Manitowoc | 888-686-0465 |
| Spring Tulip Cottage | Plymouth | 920-892-2101 |
| Tauschek's B&B | Plymouth | 920-876-5087 |
| Isadora's B&B | West Bend | 262-306-8468 |
| Wellspring Farm B&B & Hostel | West Bend | 262-675-6755 |
| Jordan House B&B | Hartford | 262-673-5643 |
| Westphal Mansion Inn B&B | Hartford | 262-673-7938 |
| Pedal's Inn | Wales | 262-968-4700 |
| Eagle Centre House B&B | Eagle | 262-363-4700 |
| Eagle Home Hostel | Eagle | 262-495-8794 262-442-6360 |
| The Lamp Post Inn | Fort Atkinson | 920-563-6561 |
| The Fargo Mansion Inn* | Lake Mills | 920-648-3654 |

| | | |
|-------------------------------------|-----------------|--------------|
| Hamilton House B&B | Whitewater | 262-473-1900 |
| Lake Ripley Lodge | Cambridge | 877-210-6195 |
| Oscar H. Hanson House B&B | Cambridge | 888-706-7227 |
| Ye Olde Manor House | Elkhorn | 262-742-2450 |
| Albany House B&B | Albany | 866-977-7000 |
| The Sutherland House B&B | Brodhead | 608-897-4481 |
| Cooksville Farmhouse Inn | Evansville | 608-335-8375 |
| Cameo Rose Victorian Country Inn | Belleville | 866-424-6340 |
| The Parsonage B&B | McFarland | 877-517-9869 |
| Arbor House, Ltd. | Madison | 608-238-2981 |
| Victorian Dreams B&B | Lodi | 608-592-0362 |
| Lake Wisconsin Cottage | Poynette | 608-635-2779 |
| Parkview B&B | Reedsburg | 608-524-4333 |
| Pinehaven B&B | Baraboo | 608-356-3489 |
| Inn at Wawanissee Point | Baraboo | 608-355-9899 |
| Bowman's Oak Hill B&B | Wisconsin Dells | 888-253-5631 |
| Sunnyfield Farm B&B | Camp Douglas | 888-839-0232 |
| Riverview B&B | Neshkoro | 920-293-4423 |
| Mecan River House B&B | Coloma | 715-228-3283 |
| Walker House | Hancock | 715-249-3100 |
| Apple Tree Lane B&B | Waupaca | 877-277-5316 |
| Cleghorn B&B | Waupaca | 800-870-0737 |
| Crystal River Inn | Waupaca | 800-236-5789 |
| Artha Sustainable Living Center B&B | Amherst | 715-824-3463 |
| Lindsay House B&B | Manawa | 920-596-3643 |

| | | |
|-----------------------------------|-------------------|--------------|
| A Victorian Swan on Water B&B | Stevens Point | 800-454-9886 |
| Dreams of Yesteryear B&B | Stevens Point | 715-341-4525 |
| Everest Inn | Wausau | 888-848-5651 |
| Stewart Inn | Wausau | 715-849-5858 |
| Elcho Victorian Rose B&B | Elcho | 715-275-4288 |
| Cobblestone B&B | Birchwood | 800-659-4883 |
| Tagalong Golf & Resort | Birchwood | 715-354-3397 |
| The Farm B&B | Birchwood | 715-354-3367 |
| Inn Greener Pastures | Chetek | 715-353-2697 |
| Canyon Road Inn | Turtle Lake | 888-251-5542 |
| Wissahickon Farms Country Inn B&B | Saint Croix Falls | 715-483-3986 |



APPENDIX I: IATA PARTNERS



IATA Partners

Youth groups/organizations are listed in bold

| | |
|--|---|
| American Hiking Society | Cornell High School (12 “Junior Trail Builders” at Chippewa River MSC Project) |
| American Hiking Society Volunteer Vacationers | Cross Plains Cub and Boy Scouts |
| American Institute of Professional Geologists | Cross Plains Lions |
| American Red Cross | Cultural Festival at Stevens Point Area Senior High |
| AmeriCorps | Dan Storey Foundation |
| Baraboo Middle School | Dane County Environmental Council |
| Barron High School | Dane County Farmers’ Market |
| Birchwood High School | Dane County Natural Heritage Land Trust |
| Boy Scout Troop 835 from Cedarburg | Dane County Parks |
| Boy Scouts of Marathon County | Dane County Parks Harvest Moon Festival at the Lussier Center |
| Braun Woodlands Foundation | Department of Corrections S.P.R.I.T.E. Program |
| Brill Harvest Days | Discovery Depot Children’s Museum of Portage |
| Cedar Lakes Conservation Foundation | Elkhorn High School |
| City of Antigo Parks and Recreation | Erin Elementary Cub Scout Pack 101 |
| City of Baraboo Department of Public Works | Forest Industry Safety & Training Alliance |
| City of Baraboo Department of Parks and Recreation | Fort Winnebago School |
| City of Janesville | Friends of Pike Lake |
| City of Janesville Parks Department | Friends of Riverside Park |
| City of Lodi Rotary Club | Gathering Waters Conservancy |
| City of St. Croix Falls | George Williams College of Aurora Univ. |
| City of Two Rivers | Girl Scouts of America |
| Clearwater Camp for Girls | Girl Scouts of Milwaukee Area |
| Coloma Elementary | Goodrich Elementary School (Milwaukee) |
| Community RECAP Program (Janesville) | Groundwork (Gary, IN; Milwaukee, WI) |
| Construct-U (Madison YMCA) | |

Hendricks Land Development

Interstate State Park

Janesville School District

John Muir Park

June Dairy Day, Portage County

Junior Trail Builders (Tomorrow's Guiding Lights)

Knowles–Nelson Stewardship Program

Lac Courte Oreilles Tribe

Lakeview School in the Town of Whitewater

Land Trust Alliance

Langlade County Forestry and Parks Department

Leave No Trace

Lodi High School

Lodi Middle School

Lodi School District

Luck High School

Luck Museum and Library

Madison School & Community Recreation Program

Manitowoc Public Schools' Rahr Memorial School Forest

Marathon County Parks Department

Marquette County Preservation Society

Maywood Environmental Park

Mentors and Mentees

Midwest Energy Fair

Midwest Mountaineering Outdoor Expo (Twin Cities)

Milton School District

Minnesota Conservation Corps

National Park Service

National Park Service Challenge Cost Share Program

National Trails Fund

Natural Heritage Land Trust

New Auburn School District

New Vision Wilderness

Nordic Walking State Championship

North Central Regional Planning Commission

Northwest Passage Group

Omro Boy Scout Troop

Optimists International

Ozaukee Washington Land Trust

Partnership for the National Trails System

Post 245 of the American Legion

Potlatch, Inc.

Prairie Chicken Festival

Professional Trail Builders Association

Project HEAL (Healthy Eating and Active Lifestyles)

Purdy School in Fort Atkinson

REI

Rice Lake High School

Rice Lake Tourism and Retail Development Commission

Riverland Conservancy

Rock County Parks Department

Rock County RECAP Program

Rock Trails Coalition

Rusk County Forestry Department

Sauk Prairie Memorial Hospital Foundation's Healthy Life Initiative Grant

Schlitz Audubon Center in Milwaukee
Sheboygan Chapter of the American Red
Cross

Shell Lake School District

Sierra Club

**Slinger High School Floriculture and
Landscaping Class**

**Slinger Middle School National Honor
Society**

Spooner School District

St. Charles Focus Group

St. Croix Falls High School

St. Croix Falls Information Center

**Students from the School of Natural
Resources at UW-Stevens Point**

Taylor County Forestry Department

The Conservation Fund

U.S. Army National Guard

U.S. Fish and Wildlife Service

U.S. Forest Products Lab

United Way Day of Caring

United Parcel Service

University of Wisconsin/University Ridge
Golf Course

UW-Baraboo/Sauk County

UW-Eau Claire Service Learning

UW-Madison Hoofers

UW-Marathon County Continuing Education
series

UW-Whitewater Persuasion Class

Verona High School

Village of Plymouth

Volksmarch Association

Volunteers for Outdoor Colorado

Waushara County Human Services

Workenders (Janesville)

Waupaca County Parks Department

Wausau Paper Company

**West Bend High School SEED (Saving the
Earth Every Day) Environmental Club**

West Wisconsin Land Trust

Wisconsin ATV Association

Wisconsin Bed and Breakfast Association

Wisconsin Conservation Hall of Fame

Wisconsin County Forest Association

Wisconsin Department of Natural Resources

Wisconsin Off-Road Bicycling Association

Wisconsin Natural Resources Board

Wisconsin Public Radio

Wisconsin Public Television

Wisconsin State Horse Council

Wisconsin State Park System Trail Crew

Wood Lake County Park

Woodland Dunes Nature Center and Preserve