



WISCONSIN DEPARTMENT OF TOURISM
RESEARCH

Economic & Demographic Profile of Wisconsin's ATV Users:

Results of an economic survey conducted between June-October 2003

In conjunction with

Wisconsin ATV Association (WATVA)

**Department of Urban & Regional Planning
University of Wisconsin-Madison/Extension**

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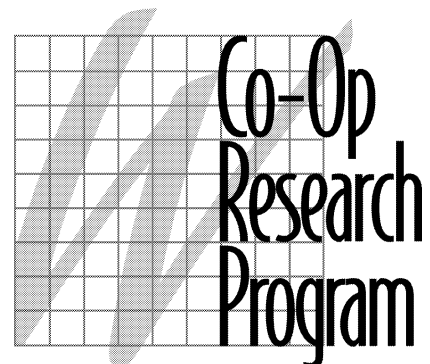




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2003 Profile of Wisconsin's ATV Users

The All-Terrain Vehicle (ATV) industry has witnessed changes since Honda introduced the first ATV in 1971 – the three-wheeler. During the 1980s Suzuki was credited with introducing the first four-wheeler. According to the Specialty Vehicle Institute of America (SVIA), an ATV is defined as a four-wheeled motorized vehicle designed for a single rider; in more general terms, a durable vehicle used for work and recreational purposes.

The ATV Safety Institute (a division of SVIA) reports that fifteen million Americans ride ATVs with 70% used for family recreation. Sales of ATVs have increased five-fold since 1993 to more than 847,000 units in 2002. The average age of an ATV owner is 40 and most are married; 90% are males; 43% have professional/managerial occupations and the median household income of an ATV owner is over \$60,000.

According to an article in the September 2003 issue of *ATV Action*, “when it comes to four-wheeling, Wisconsin is an undiscovered paradise.” During the past 15 years, ATV usage has increased dramatically. The Wisconsin Department of Natural Resources began registering ATVs in 1986, and by the end of 1987 there were a total of 25,600 registered ATVs in the state. Just ten years later, that figure more than tripled to 79,245, and by the end of 2003, there were a total of 192,211 registered ATVs in the state. The popularity of ATV trail riding is evident in that Wisconsin is home to 5,555 miles of state-funded trails; 1,559 miles open for summer usage and 3,996 miles available in the winter. These figures do not include trails found on private lands or operated as club trails.

In an attempt to gather more information about Wisconsin's ATV riders, the Department of Tourism partnered with the Wisconsin All-Terrain Vehicle Association (WATVA) and the University of Wisconsin's Department of Urban and Regional Planning¹ to gather marketing and economic impact information. The objectives of the research were: 1) to define an ATV rider (age, educational level, and residence); 2) to describe characteristics of the ATV trip (length of overnight stays, overnight accommodations, and party size), 3) to identify the user's reasons for being in the area and other attractions/activities they will participate in while on this trip; 4) to assess the importance of various aspects of ATV trail riding; 5) to measure user expenditures in the area; and 6) to determine the economic impact of nonresident visitors in the area.

Research Methods

The results reported in this report are based on a stratified random trail sample of ATV users across the state of Wisconsin. Using WATVA Trail Patrol Ambassadors², respondents were randomly intercepted statewide beginning in late June through the end of October 2003. The sample was regionally stratified by number of trail miles in each region. At pre-set days and times, ATV riders 16 years or older were identified at trail intersections, trailheads or rest stops as well as at ATV events and face-to-face interviews were conducted

¹ Professor Dave Marcouiller (Ph.D.) of the University of Wisconsin-Madison conducted the economic impact analysis of ATV riders in Wisconsin by analyzing survey-based expenditure estimates and applying them to a regional economic impact model using Micro-IMPLAN, a standard input-output system.

² Trail Patrol Ambassadors are certified DNR ATV Safety Instructors who have gone through a certification process via the National Off-Highway Vehicle Insurance & Services Group Inc. (NOHVIS) / Wisconsin ATV Association. Trail Patrol Ambassadors are volunteer patrollers whose primary goals are to act as role models for other ATVer's, distribute regulations and information, and assist stranded ATV riders.



using a survey instrument (see Appendix A) developed and pre-tested to generate information of interest to the Wisconsin Department of Tourism. No incentive was given to the respondents.

This random selection and face-to-face interviewing process generated roughly 1,100 samples with virtually 100 percent response. This sample is considered generally representative of the broader population of ATV users in the state. Based on license data, this stratified random sample was used to represent a total of 211,203 individual ATVs, of which approximately 181,530 were Wisconsin registered ATVs, 11,637 were Minnesota ATVs, 3,103 were Iowa ATVs, 9,503 came from Illinois, and 5,430 came from other states.

Once compiled and cleaned, this survey response dataset was analyzed for descriptive frequencies and various cross-tabulations. The expenditure information was expanded based on a variety of control features. Control was made for party size; number of ATVs owned by respondent, region intercepted, origin of travel, state license data and regional trail mileage.

Expanded regional expenditure estimates were applied to an input-output model (constructed using Mico-IMPLAN and county-level datasets) that allowed regional economic structure to dictate the extent of multiplier effects. The results of the input-output model served as a basis for estimates of regional economic impact.

Limitations

Like all research, this study has a number of limitations, which requires the reader to be cautious in interpreting the findings.

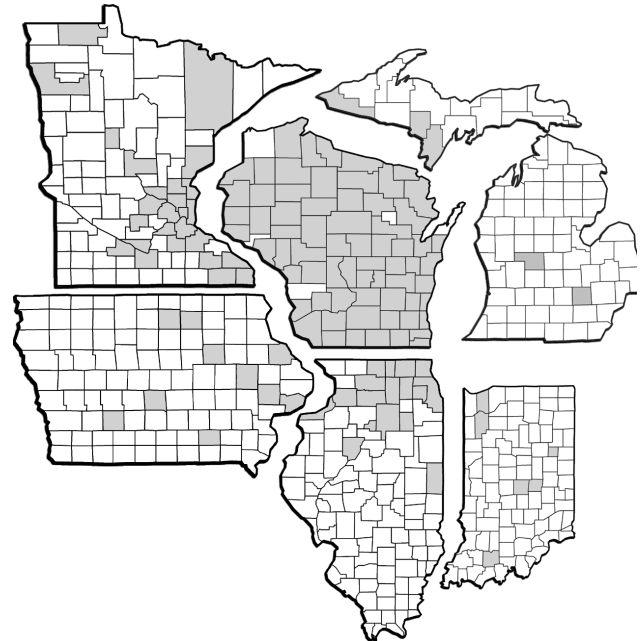
Limitations exist with this analysis and include assumptions behind the stratified random sample selection, expansion of expenditure patterns, ability of the current regional business structure to accommodate increased numbers of visitors, and general assumptions of input-output analysis. Also, it is important to realize that survey work was limited to available budgets. The survey results are biased toward characteristics of summer and fall ATV users with samples being drawn between June and October 2003. Further research could more fully identify characteristic differences in ATV use between summer/fall and winter/spring seasons. Annualized estimates were based on reported number of annual trips but characteristics of individual trips reflect this seasonal caveat. Indeed, there could be many reasons that would lead to speculation about characteristic differences of winter trips. These provide a limitation to the results reported in this report.

These caveats aside, there is ample reason to believe that positive economic impacts will be witnessed in communities across the state as a result of ATV use. Weighing these positive market-based impacts with traditional cost-benefit analysis that includes endemic issues of recreational use conflict, environmental impact, and inherent underlying political and social implications are necessary to fully address the impact of ATV use in Wisconsin.



Profile of Wisconsin's ATV Users

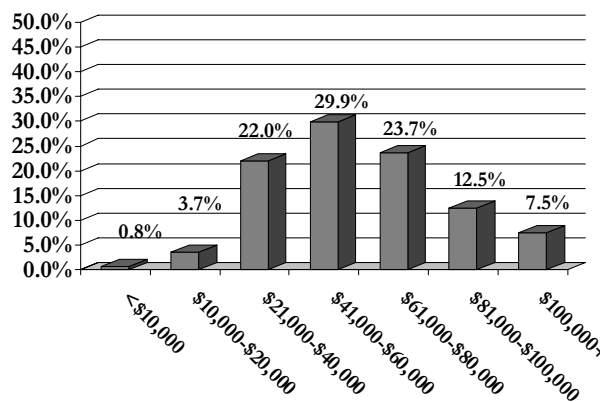
- The majority of riders come from the Midwestern states; Wisconsin (86%), Minnesota (6%), Illinois (5%), Iowa (2%), Indiana (0.6%) and Michigan (0.5%). The shaded counties indicate the residence of ATV riders we interviewed in Wisconsin last summer.
- When looking at the residence of ATV users by their respective Designated Market Areas³, 30% resided in the Green Bay DMA, which covers approximately fifteen Wisconsin counties and one Michigan county. Seventeen percent resided in the Milwaukee DMA, which is comprised of 10 Wisconsin counties. Fifteen percent come from the Wausau-Rhinelanders DMA (11 WI counties); 10% from the Madison DMA (11 WI counties) and 7% from the Twin Cities DMA (comprised of the majority of Minnesota counties and 6 WI counties along the western border). To see a complete breakout of the DMAs, contact the Department of Tourism.



County of Residence for Wisconsin's ATVers

- Over the course of a year, these riders take an average of six ATV trips in Wisconsin.
- The average age of survey respondents was 40 years.
- Thirty percent have annual household incomes between \$41,000 and \$60,000; 24% had incomes between \$61,000 and \$80,000.
- Sixty-two percent have some form of education beyond high school.
- In addition to ATV riding, favored leisure activities include ATV riding, hunting, fishing, camping, snowmobiling and boating.
- Most (97%) owned their ATVs and on average, own two machines.
- More than 90% use their ATVs for trail riding, 50% use them for hunting, 46% use them around their home or farm; 42% use them for fishing or ice fishing; and 10% use the machines for racing.

Annual Household Income



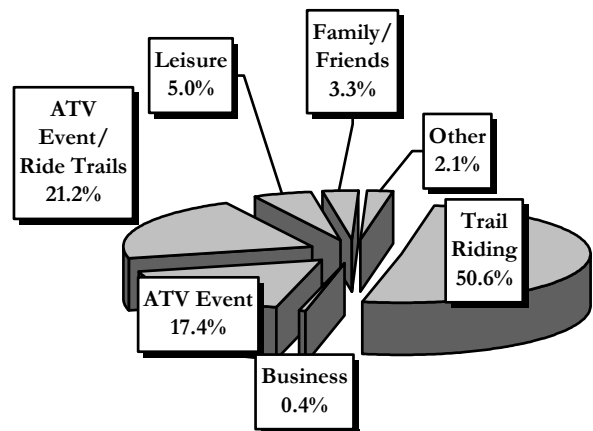
³ The Lifestyle Market Analyst, a publication produced by Standard Rate and Data Service are areas defined by Nielson Media Research and are commonly referred to as television or broadcast markets.



- Seven out of ten survey respondents indicated they ride their ATVs in the winter.
- When planning their leisure trips, ATV riders primarily rely on word of mouth recommendations, the Internet, Wisconsin's Tourism Guides, local tourism information, the DNR, and magazines.
- Three-fourths of the respondents were males; females accounted for 25%.

Trip Characteristics

- Over half of the riders were in the area to specifically ride the trails; 21% were attending an ATV event and riding the trails; 17% were attending an ATV event; and 5% were on a leisure trip.
- The majority (62%) were on an overnight trip from home and the type of overnight lodging these visitors were using included RVs, hotel/motel, 2nd/vacation homes, with family and friends, campgrounds or rented cabins.
- ATV visitors who stayed overnight spent 3 nights in the area. RV campers stayed the longest (3.7 nights) and hotel/motel visitors stayed the shortest (2.5 nights).
- The average ATV party consisted of almost five people and was primarily comprised of family and friends or family only groups.
- Over one-half of all travel groups did not have children under the age of 15. The parties that did, on average, had 2.5 children.
- When planning this ATV trip, 52% relied on word of mouth recommendations, ATV clubs (26%), or the Internet (13%).
- Most ATV visitors invested a fair amount of time in planning their ATV trip. Twenty-two percent planned it within a week; 25% planned it within a month; and 24% planned it between 1-3 months in advance.
- Other trip-related activities ATVer participants participated in while in the area included shopping, dining, visiting family/friends, attending ATV races, festival/event, water-related sports, going to a casino, museum/historic site, or other area activities.



Primary Reason for Trip



ATV Attribute Ratings

Using a five-point scale--with 5 being very important and 1 being not at all important--ATV users were asked to rate various trip-related attributes related to their ATV experience. The following table provides the average rating for each attribute.

Riding with friends.....	4.7
Riding with family.....	4.6
Scenery.....	4.6
Trail signage.....	4.6
Trail safety.....	4.6
Variety of terrain.....	4.6
Exploring new areas.....	4.5
Relaxation.....	4.5
Length of ride.....	4.3
Riding trails only.....	4.2
Location of restaurants/entertainment on trail....	4.2
Access to intensive use areas ⁴	3.9

In addition, users were asked what could be done to enhance their ATV experience. Almost half (48%) of all who responded to this question indicated they wanted to see more trails through expanding and/or connecting trails. Also cited frequently was more/better trail signage (11%) and trail grooming (8%). The table below presents the summary of all responses.

More trails, expanded trails, connecting trails.....	48.3%
More/better trail signage.....	10.5
Groom trails.....	8.0
More rougher terrain, water holes, wider trails.....	5.4
More lodging along trails, shower facilities, etc.....	3.9
More/improved maps.....	2.3
More rest/water stops, picnic facilities.....	2.1
Winter riding.....	1.8
More gas stops.....	1.5
More trail information.....	1.5
Access improvements to businesses.....	1.0
More intensive use areas & keep them open longer.....	1.0
Keep trails open longer.....	1.0
Dump stations for RVs.....	1.0
Share snowmobile trails.....	0.8

⁴ An *intensive use area* is a managed and controlled area where ATV enthusiasts can hone up on their ATV driving skills.



Spending Habits of All ATV Users

In an effort to understand the travel-related spending habits of ATV users, survey respondents were asked to report the total amount of money they had personally spent on their trip in nine expenditure categories. These categories included lodging, food/drink at area restaurants/bars, area entertainment, admissions, etc., shopping (souvenirs, gifts, clothing), gas/parking/repairs/transportation, convenience stores, gaming/sweepstakes, and other expenses.

Following data cleaning (assessment of outliers) and accounting for non-responses, analysis suggested that the average ATV user spent roughly \$520 per trip. The table below provides the average amount of spending per person per ATV trip by type of business.

Lodging	\$118.02
Food & drink	87.65
Entertainment	41.56
Shopping	71.04
Gas/transportation	82.10
Convenience stores	29.63
Gaming	38.41
Other	<u>54.92</u>
Average Total Per Trip	\$523.33

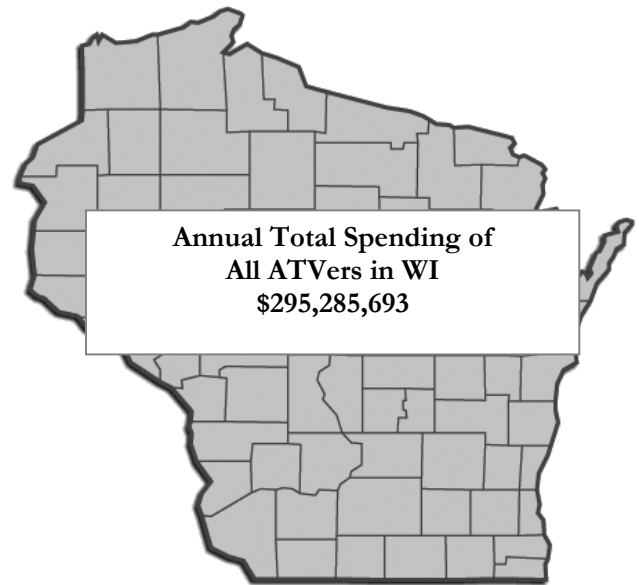
Taking into consideration Wisconsin's ATV visitors stayed an average of 3.2 nights, the average per person per day expenditure amounted to \$163.54. Spending patterns of ATV users varied by region and reflected important differences in business structure and motivation for travel. These alternative regional spending patterns are found in the regional fact sheets at the end of this report.



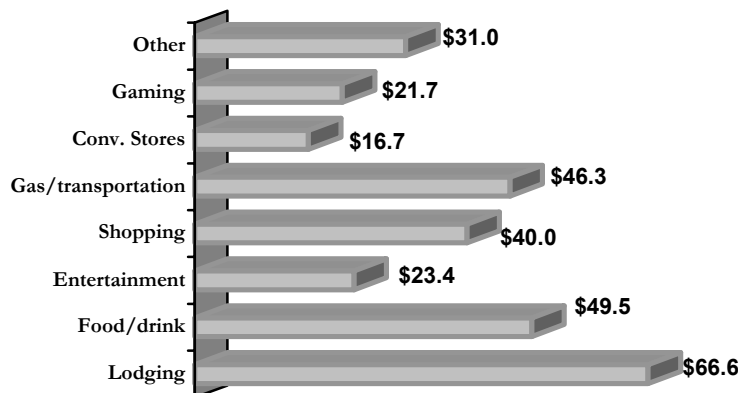
Total ATV User Spending

Individual per trip spending patterns were expanded to total spending using estimates of the total number of ATV registrations by state, the number of ATVs owned per individual, the number of trips taken per individual, and both the regional incidence of trail use and the respective trail mileage. Based on this analysis, annual total user spending for **all** people ATVing in the state amounted to roughly \$295 million.

The figure below displays the annual spending by category.



Annual Total Spending of All ATVers in Wisconsin by Category
(In Millions)



Regional differences in total spending levels were dramatic and represent the incidence of ATV use by region and differing regional spending habits. These regional totals can be found in the fact sheets at the end of this report.



Translating ATV User Spending into Regional Economic Impact

One of the objectives of this research was to survey ATV users for their spending habits and then analyze these figures with a regional model for estimating economic impacts. Total ATV user spending and economic impact are two separate issues. ATVing brings people into a particular region where they spend money that would not be in the region without their visit.

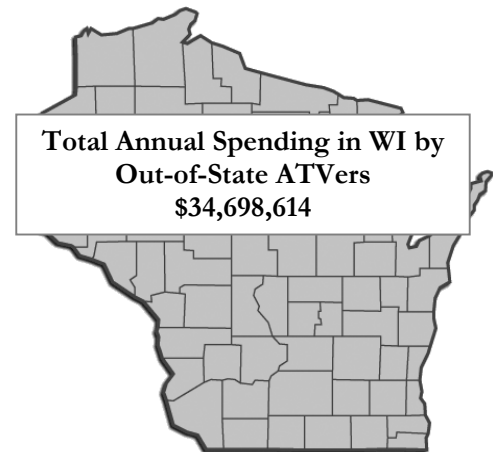
For the purposes of this report, the primary focus in ***economic impact*** analysis is identifying how income is generated from “new dollars” flowing into a region from visitors who live outside that region. Expenditures made by these “non local” ATVers contribute to the total receipts of firms that operate in and around a given region. Once again, economic impact begins with NEW dollars in the region. With this increase in the amount of money taken in receipts, these businesses then react by creating jobs, meeting a payroll, paying local taxes and making their businesses more profitable. This leads to an economic impact, namely through the creation and distribution of jobs and income. This is NOT the same as the total amount of ATV user spending.

Total spending includes the dollars that all ATVers spent while in a particular region, regardless of whether or not they live in that region. This total spending represents a combination of both new and existing money in the region.

Per Trip Spending for Out-of-State ATVers

As just stated, economic impact analysis is driven by “new dollars” flowing into a region from visitors who reside outside that region. For the State of Wisconsin, this amount of NEW money represents that which is spent by out-of-state ATV users in Wisconsin. The table below highlights the average amount of spending for out-of-state ATVers per person per ATV trip by type of business.

Lodging	\$129.90
Food & drink	97.64
Entertainment	44.09
Shopping	75.57
Gas/transportation	91.36
Convenience stores	32.02
Gaming	45.32
Other	57.55
Average Total Per Trip	\$573.46

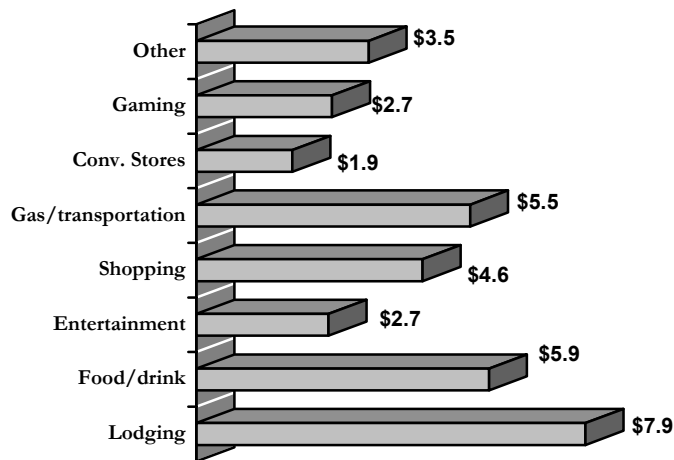


Out-of-state ATV enthusiasts had a total spending pattern that amounted to about \$35 million.



The graph below presents the annualized spending for out-of-state ATVerS by type of business. The amount of non-local spending will vary dramatically by region and reflects regional size, differing characteristics of ATV users considered non-local, and amount of regional ATV use. These regional estimates are found in the fact sheets at the end of this document.

**Total Annual Spending by
Out-of-State ATV Riders in Wisconsin by Category
(In Millions)**



Estimating the Economic Impact of ATV Users

The state of Wisconsin has a fairly vibrant economy, which is based primarily in manufacturing and agriculture. Its tourism component has grown rapidly during the past 25 years. With total personal income in excess of \$150 billion, the average household income of its 2.4 million households (total population of roughly 5.4 million people) was almost \$67,000 in 2001. Thus, the economic stimulus of new dollars spent by out-of-state ATV users is quite modest relative to the overall economic structure of the state.

Average expenditures for non-local visitors have been identified by industry groups sensitive to travel expenditures (see previous graphic). When we apply the new dollars to an input-output model of Wisconsin, the multiplier effect of inter-industry purchases generates indirect impacts and the increased income of households drives induced impacts.

NEW money brought into Wisconsin by ATVerS from the outside had broader impacts on the economic structure of the state. This new money had the effect of stimulating local business activity in communities near trails where ATVerS occurs. Results of the spending shock to the input-output model for Wisconsin suggests that the direct spending of non-local visitors (\$33 million in 2001 year equivalent) generated a total direct, indirect and induced output impact of roughly \$56 million. Overall, this reflects an output multiplier



of roughly 1.69, which is reasonable given the relative size of the state's economy. From the perspective of income, this amount of new spending translated into roughly \$18 million in direct income effect and about \$31 million in total income (value added multiplier of roughly 1.72). From a jobs perspective, this amount of new spending supported roughly 815 total jobs with an added indirect and induced effect of roughly 270 jobs (employment multiplier of 1.33).

A quick note on the difference between output and value added. Output is the total result of all economic activity and is analogous to gross regional product, gross state product, and gross national product. In other words, it is the total accounting for all regional production. Value added is defined as the value of the region's business output minus the value of all inputs purchased from other firms. It is therefore a measure of the "profit" or income generated locally. Value added includes a combination of employee compensation, proprietor's income ("business profit"), other property type income, and indirect business taxes paid to governments.

Smaller substate regions will experience widely varying levels of non-local spending. In general, non-local spending at the substate regional level will be considerably higher than non-local spending at the state level. This is due to the simple fact that as region size decreases, the amount of non-local ATV use increases. Analytically, this is the driver behind the generally larger amounts of non-local spending identified in the regional assessments.

In an opposite way, economic impacts (or multiplier effects) at the local level will become smaller. This is due to the simple fact that as the size of regional economies decreases, the amount of leakage from the region increases (thus causing a decline in the economic multiplier effects). Multiplier effects that represent economic impact, at the sub-state regional level, range from about 1.1 to 1.3 and depend on the diversity of regional business activity and its reliance on outside inputs.



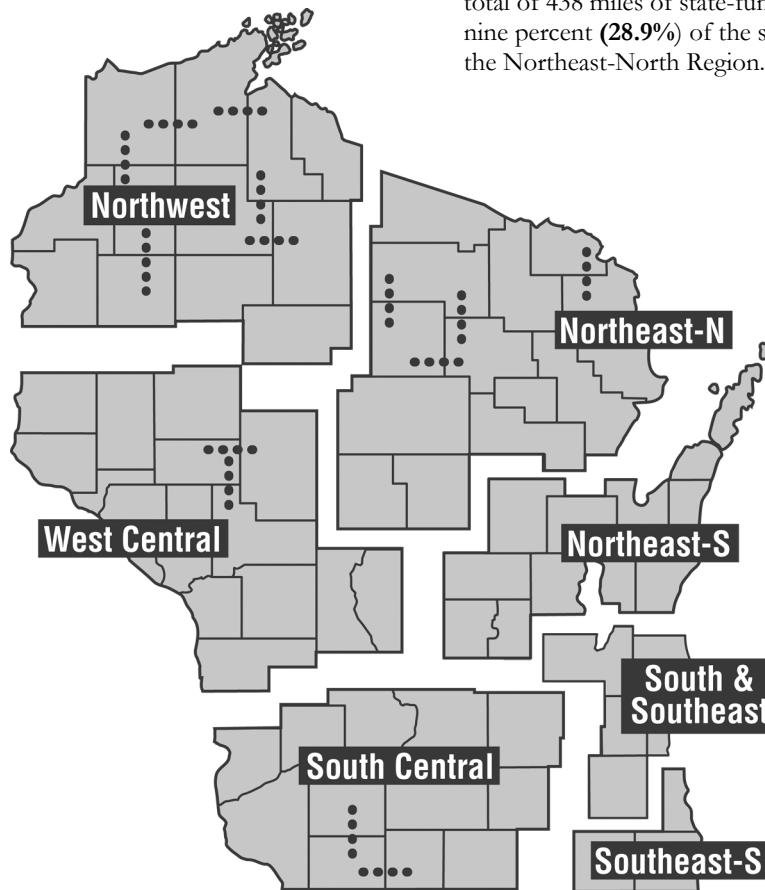
Regional Analysis

The National Off-Highway Vehicle Insurance & Services Group (NOHVIS) in conjunction with the Wisconsin's ATV Association and the Wisconsin Department of Natural Resources have defined seven regions of Wisconsin. These regions are Northwest, Northeast-North, West Central, Northeast-South, South & Southeast, Southeast-South, and South Central. Surveys were conducted regionally in all regions except South & Southeast and Southeast-South due to the limited number of ATV trails. The map below gives a brief description of the regions.

The dotted lines on the map are representative of the trails where ATV users were interviewed. The Northeast-South region includes surveys conducted of ATVers at the WATVA booth at Ducks Unlimited Great Outdoor Festival in Oshkosh.

Northwest Region – Included are the counties of Douglas, Bayfield, Ashland, Iron, Burnett, Washburn, Sawyer, Price, Barron, Rusk, Polk and Taylor. There are a total of 808 miles of state-funded ATV trail in this region. Almost thirty-six percent (35.8%) of the surveys were collected in this region.

Northeast-North Region – This region includes the counties of Vilas, Oneida, Forest, Florence, Marinette, Oconto, Langlade, Lincoln, Marathon, Menominee, Shawano, Wood and Portage. These counties have a total of 438 miles of state-funded ATV trails. Twenty nine percent (28.9%) of the surveys were collected in the Northeast-North Region.

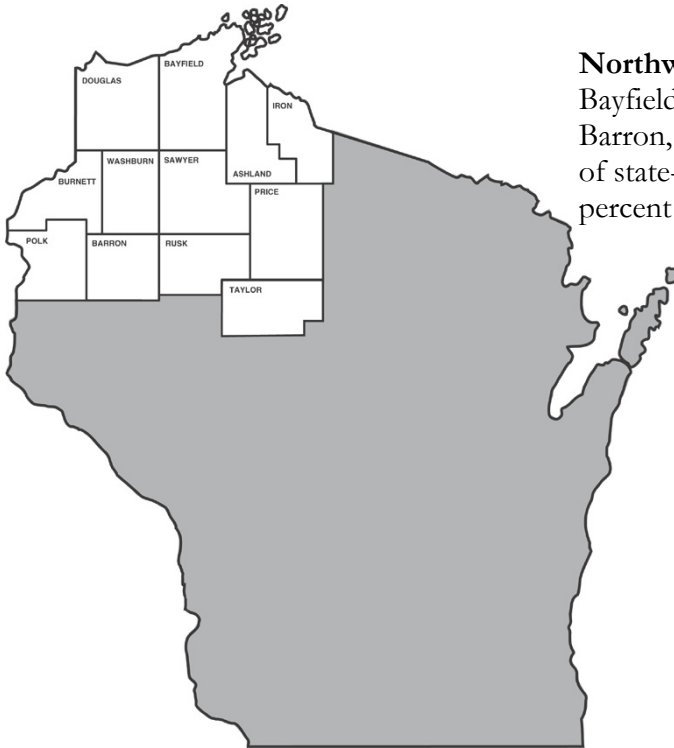


West Central Region – St. Croix, Dunn, Chippewa, Clark, Jackson, Trempealeau, Buffalo, Eau Claire, La Crosse, Monroe, Juneau, Adams and Vernon Counties make up this region and have a total of 222 miles of state-funded ATV trails. Fifteen percent (15.1%) of the surveys were collected in this region.

Northeast-South Region – Included are Door, Kewaunee, Manitowoc, Calumet, Outagamie, Waupaca, Waushara, Winnebago, Brown, Marquette and Green Lake counties are included in this region. Approximately 20 miles of state-funded ATV trails are in this region. A little more than sixteen percent (16.2%) of the surveys were taken in this region.

South Central Region – The counties of Dodge, Columbia, Sauk, Richland, Crawford, Grant, Lafayette, Iowa, Dane, Jefferson, Green and Rock make up the South Central Region and has a total of 65 miles of state-funded ATV trails. Four percent (4%) of all surveys were collected in this region.

South/Southeast-South – Due to the limited number of ATV trails in these regions, surveys were not conducted.



Northwest Region – Included are the counties of Douglas, Bayfield, Ashland, Iron, Burnett, Washburn, Sawyer, Price, Barron, Rusk, Polk and Taylor. There are a total of 808 miles of state-funded ATV trail in this region. Almost thirty-six percent (35.8%) of the surveys were collected in this region.

**User Spending – All ATVer
Annual Spending**

Lodging	\$33,398,401
Food/drink	25,453,063
Entertainment	10,248,201
Shopping	15,720,942
Gas/transportation	23,225,891
Convenience Stores	7,390,265
Gaming	9,046,308
Other	<u>10,881,259</u>

**Annualized Total
User Spending** **\$135,364,331**

Average Individual Per Trip Spending

Lodging	\$245.61
Food/drink	110.97
Entertainment	44.68
Shopping	68.54
Gas/transportation	101.26
Convenience stores	32.22
Gaming	39.44
Other	<u>47.44</u>

Total **\$590.16**

Travel Party Characteristics

Travel party composition	
Family & friends	49%
Family only	26
Friends only	20
Average party size	5.4
Parties with children under 15	50.4%

Trip Characteristics

Overnight visitors in region	79%
Primary lodging accommodations	
Hotel/motel	22%
RV	22
Tent	13
Rented cabin	12
Average nights stayed in region	4
Primary reasons for being in area:	
Ride trials	28%
Ride trails/attend ATV event	57
Advance planning for trip	
Within a month	25%
1-3 months in advance	29
6 months +	17
Trail informational sources	
Word of mouth	56%
ATV clubs	28
Internet	18
Participation in area activities	
Dining	57%
Shopping	43
ATV races	40
Festival/event	27
Area attractions	25
Visit family/friends	25



Northwest Region - Continued

Visitor Demographics

State of origin	
Wisconsin	76%
Minnesota	13
Illinois	6
Residence by media market	
Wausau-Rhineland	21%
Twin Cities	19
Green Bay	12
Duluth-Superior	11
Average age	41
Annual household income:	
Less than \$21,000	2.8%
\$21,000-\$60,000	48.6
\$61,000-\$100,000	41.8
\$100,000 +	6.7
Males	70%
Favored leisure activities	
ATV riding	52%
Hunting	14
Camping	5
Fishing	5
Average # of ATVs owned	2.3
Average # of WI ATV trips taken in year	4.8

Visitor Spending - Non Local ATVers

The table below presents the annual spending for non local ATVers in the Northwest Region. All ATVers who live within this twelve-county region have been excluded from this spending. In other words, the expenditures below represent “new dollars” coming into this region from non local ATVers.

Annual Spending

Lodging	\$28,098,790
Food/drink	21,376,328
Entertainment	8,076,112
Shopping	12,591,335
Gas/transportation	19,214,883
Convenience Stores	6,187,595
Gaming	8,076,112
Other	<u>6,716,966</u>

**Annualized Total
Visitor Spending** **\$110,338,123**

Average Individual Per Trip Spending

Lodging	\$153.40
Food/drink	116.70
Entertainment	44.09
Shopping	68.74
Gas/transportation	104.90
Convenience stores	33.78
Gaming	44.09
Other	<u>36.67</u>

Total **\$602.37**



Northeast-North Region – This region includes the counties of Vilas, Oneida, Forest, Florence, Marinette, Oconto, Langanade, Lincoln, Marathon, Menominee, Shawano, Wood and Portage. These counties have a total of 438 miles of state-funded ATV trails. Twenty nine percent (**28.9%**) of the surveys were collected in the Northeast-North Region.

User Spending – All ATVers
Annual Spending

Lodging	\$19,409,298
Food/drink	13,845,512
Entertainment	5,760,970
Shopping	10,106,123
Gas/transportation	12,770,771
Convenience Stores	4,785,708
Gaming	6,338,310
Other	<u>11,520,163</u>
Annualized Total	
User Spending	\$84,536,854

Average Individual Per Trip Spending

Lodging	\$109.26
Food/drink	77.94
Entertainment	32.43
Shopping	56.89
Gas/transportation	71.89
Convenience stores	26.94
Gaming	35.68
Other	<u>64.85</u>
Total	\$475.88

Travel Party Characteristics

Travel party composition	
Family only	40%
Family & friends	38
Friends only	17
Average party size	5.0
Travel parties with children under 15	42.8%

Trip Characteristics

Overnight visitors in region	65%
Primary paid lodging accommodations	
2 nd /vacation home	28%
RV	16
Rented cabin	14
Hotel/motel	11
Average nights stayed in region	3
Primary reasons for being in area:	
Ride trials	70%
Ride trails/attend ATV event	16
Advance planning for trip	
Within a month	27%
1-3 months in advance	29
6 months +	5
Trail informational sources	
Word of mouth	53%
ATV clubs	31
Internet	10
Participation in area activities	
Dining	62%
Shopping	38
Visit family/friends	33
Festival/event	25



Northeast-North Region - Continued

Visitor Demographics

State of origin	
Wisconsin	96%
Illinois	2
Residence by media market	
Green Bay	55%
Wausau-Rhineland	18
Milwaukee	16
Madison	5
Average age	42
Annual household income:	
Less than \$21,000	25.4%
\$21,000-\$60,000	51.1
\$61,000-\$100,000	36.4
\$100,000 +	7.1
Males	76%
Favored leisure activities	
ATV riding	43%
Hunting	17
Fishing	7
Camping	5
Average # of ATVs owned	2.0
Average # of WI ATV trips taken in year	7.6

Visitor Spending – Non Local ATVs

The table below presents the annual spending for non local ATVs in the Northeast-North Region. All ATVs who live within this thirteen-county region have been excluded from this spending. In other words, the expenditures below represent “new dollars” coming into this region from non local ATVs.

Annual Spending

Lodging	\$9,080,724
Food/drink	6,431,079
Entertainment	2,738,199
Shopping	4,504,629
Gas/transportation	6,352,623
Convenience Stores	2,314,847
Gaming	2,749,075
Other	<u>6,090,066</u>

**Annualized Total
Visitor Spending** **\$40,261,242**

Average Individual Per Trip Spending

Lodging	\$109.26
Food/drink	77.94
Entertainment	32.43
Shopping	56.89
Gas/transportation	71.89
Convenience stores	26.94
Gaming	35.68
Other	<u>64.85</u>
Total	\$475.88



West Central Region – St. Croix, Dunn, Chippewa, Clark, Jackson, Trempealeau, Buffalo, Eau Claire, La Crosse, Monroe, Juneau, Adams and Vernon Counties make up this region and have a total of 222 miles of state-funded ATV trails. Fifteen percent (**15.1%**) of the surveys were collected in this region.

Travel Party Characteristics

Travel party composition	
Family only	36%
Family & friends	34
Friends only	23
Average party size	4.5
Travel parties with children under 15	39%

Trip Characteristics

Overnight visitors in region	65%
Primary paid lodging accommodations	
RV	38%
Hotel/motel	16
2 nd /vacation home	14
Tent	11
Average nights stayed in region	3
Primary reasons for being in area:	
Ride trials	80%
Attend ATV event	7
Leisure trip in area	7
Advance planning for trip	
Within a week	29%
Within a month	22
1-3 months	18
Trail informational sources	
Word of mouth	51%
ATV clubs	32
Internet	11
Participation in area activities	
Dining	50%
Shopping	37
Visit family/friends	28
Area attractions	27

User Spending – All ATVers Annual Spending

Lodging	\$9,111,358
Food/drink	8,469,413
Entertainment	5,192,992
Shopping	11,358,629
Gas/transportation	7,453,232
Convenience Stores	3,237,515
Gaming	6,186,942
Other	<u>4,972,526</u>

**Annualized Total
User Spending** **\$55,982,607**

Average Individual Per Trip Spending

Lodging	\$98.36
Food/drink	91.43
Entertainment	56.06
Shopping	122.62
Gas/transportation	80.46
Convenience stores	34.95
Gaming	66.79
Other	<u>53.68</u>

Total **\$604.35**



West Central Region - Continued

Visitor Demographics

State of origin	
Wisconsin	87%
Minnesota	7
Illinois	5
Residence by media market	
La Crosse-Eau Claire	27%
Milwaukee	26
Madison	19
Green Bay	7
Average age⁴¹²	
Annual household income:	
Less than \$21,000	6.9%
\$21,000-\$60,000	58.2
\$61,000-\$100,000	26.7
\$100,000 +	8.2
Males	73%
Favored leisure activities	
ATV riding	54%
Hunting	13
Camping	6
Fishing	6
Average # of ATVs owned	2.2
Average # of WI ATV trips taken in year	6.4

Visitor Spending – Non Local ATVers

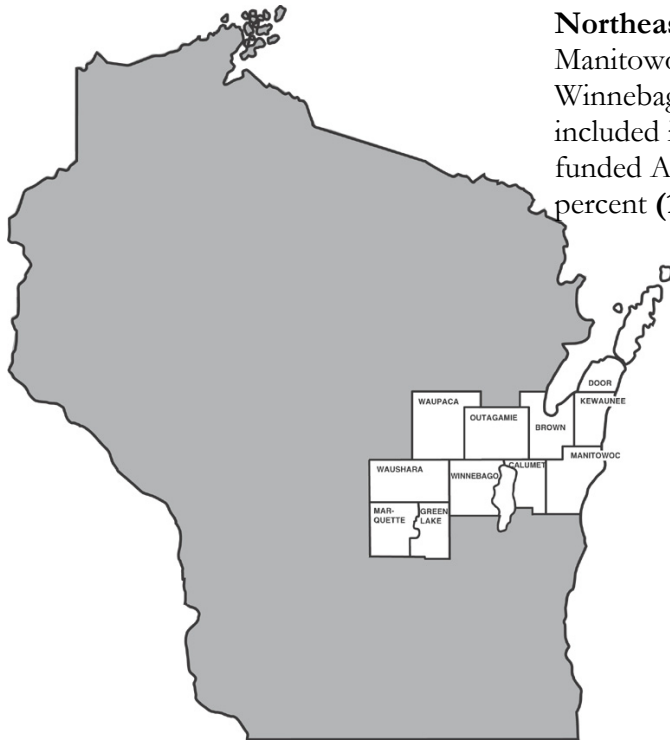
The table below presents the annual spending for non-regional ATVers in the West Central Region. All ATVers who live within this fifteen-county region have been excluded from this annual spending. In other words, the expenditures below represent “new dollars” coming into this region from non local ATVers.

Annual Spending	
Lodging	\$4,340,365
Food/drink	4,808,113
Entertainment	2,552,809
Shopping	5,764,679
Gas/transportation	4,226,588
Convenience Stores	1,637,961
Gaming	3,792,552
Other	<u>2,431,026</u>

Annualized Total Visitor Spending	\$29,554,091
--	---------------------

Average Individual Per Trip Spending

Lodging	\$103.00
Food/drink	114.10
Entertainment	60.58
Shopping	136.80
Gas/transportation	100.30
Convenience stores	38.87
Gaming	90.00
Other	<u>57.69</u>
Total	\$701.34



Northeast-South Region – Included are Door, Kewaunee, Manitowoc, Calumet, Outagamie, Waupaca, Waushara, Winnebago, Brown, Marquette and Green Lake counties are included in this region. Approximately 20 miles of state-funded ATV trails are in this region. A little more than sixteen percent (**16.2%**) of the surveys were taken in this region.

User Spending – All ATVer
Annual Spending

Lodging	\$687,360
Food/drink	534,859
Entertainment	422,890
Shopping	646,626
Gas/transportation	626,159
Convenience Stores	262,864
Gaming	218,619
Other	<u>580,709</u>

Annualized Total User Spending **\$3,980,086**

Average Individual Per Trip Spending

Lodging	\$68.51
Food/drink	53.31
Entertainment	42.15
Shopping	64.45
Gas/transportation	62.41
Convenience stores	26.20
Gaming	21.79
Other	<u>57.88</u>

Total **\$396.70**

Travel Party Characteristics

Travel party composition

Family only	43%
Family & friends	30
Friends only	20

Average party size 3.8

Travel parties with children under 15 44.5%

Trip Characteristics

Overnight visitors in region 23%

Primary paid lodging accommodations

Hotel/motel	44%
RV	23
Tent	15

Average nights stayed in region 3

Primary reasons for being in area:

Attend ATV event	49%
Ride trials	34
Leisure trip in area	10

Advance planning for trip

Within a week	29%
Within a month	21
1-3 months	21

Trail informational sources

Word of mouth	37%
Radio	26
Newspaper	12
TV	12
ATV clubs	11

Participation in area activities

Shopping	41%
Dining	33
Attend festival/event	33



Northeast-South Region – Continued

Visitor Demographics

State of origin	
Wisconsin	94%
Iowa	2
Residence by media market	
Green Bay	55%
Milwaukee	22
Wausau-Rhineland	10
Madison	7
Average age	37
Annual household income:	
Less than \$21,000	65.2%
\$21,000-\$60,000	52.9
\$61,000-\$100,000	34.5
\$100,000 +	7.5
Males	90%
Favored leisure activities	
Hunting	34%
ATV riding	24
Fishing	10
Snowmobiling	4
Average # of ATVs owned	1.6
Average # of WI ATV trips taken in year	4.5

Visitor Spending – Non Local ATVers

The table below presents the annual spending for non-regional ATVers in the West Central Region. All ATVers who live within this eleven-county region have been excluded from this annual spending. In other words, the expenditures below represent “new dollars” coming into this region from non local ATVers.

Annual Spending

Lodging	\$586,086
Food/drink	373,784
Entertainment	304,033
Shopping	517,542
Gas/transportation	405,801
Convenience Stores	173,933
Gaming	148,205
Other	<u>410,502</u>

Annualized Total Visitor Spending

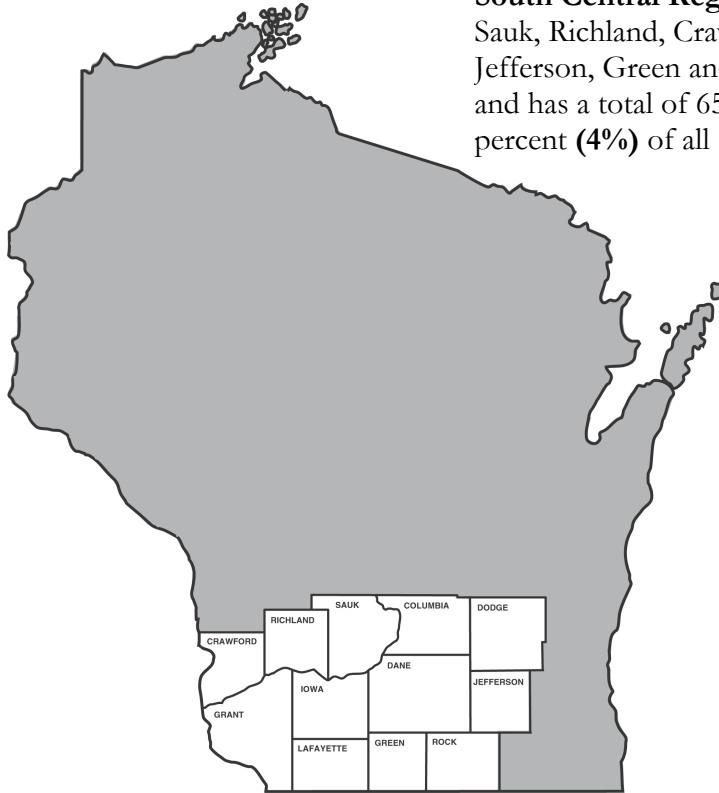
\$2,919,885

Average Individual Per Trip Spending

Lodging	\$92.26
Food/drink	58.84
Entertainment	47.86
Shopping	81.47
Gas/transportation	63.88
Convenience stores	27.38
Gaming	23.33
Other	<u>64.62</u>
Total	\$459.64



South Central Region – The counties of Dodge, Columbia, Sauk, Richland, Crawford, Grant, Lafayette, Iowa, Dane, Jefferson, Green and Rock make up the South Central Region and has a total of 65 miles of state-funded ATV trails. Four percent (4%) of all surveys were collected in this region.



User Spending – All ATVers
Annual Spending

Lodging	\$968,162
Food/drink	1,996,940
Entertainment	601,524
Shopping	2,183,838
Gas/transportation	2,412,498
Convenience Stores	852,825
Gaming	210,470
Other	<u>1,999,466</u>
Annualized Total	
User Spending	\$11,225,634

Average Individual Per Trip Spending

Lodging	\$23.00
Food/drink	47.44
Entertainment	14.29
Shopping	51.88
Gas/transportation	57.31
Convenience stores	20.26
Gaming	5.00
Other	<u>47.50</u>
Total	\$266.68

Travel Party Characteristics

Travel party composition	
Family only	43%
Family & friends	36
Friends only	16
Average party size	4.6
Travel parties with children under 15	56.1%

Trip Characteristics

Overnight visitors in region	52.3%
Primary paid lodging accommodations	
RV	35%
Tent	35
Hotel/motel	9
Average nights stayed in region	2
Primary reasons for being in area:	
Ride trials	85%
Attend ATV event	8
Leisure trip in area	5
Advance planning for trip	
Within a week	44%
Within a month	28
Day of trip	12
Trail informational sources	
Word of mouth	68%
ATV clubs	18
Internet	18
Participation in area activities	
Dining	57%
Shopping	46
Attend festival/event	16
Visit family/friends	16
Area attractions	14



South Central Region – Continued

Visitor Demographics

State of origin	
Wisconsin	68%
Illinois	24
Iowa	10
Residence by media market	
Milwaukee	31%
Madison	31
Chicago	12
Davenport-Rock Island-Moline	10
Average age	40
Annual household income:	
Less than \$21,000	2.7%
\$21,000-\$60,000	59.4
\$61,000-\$100,000	24.3
\$100,000 +	13.5
Males	64%
Favored leisure activities	
ATV riding	39%
Hunting	11
Camping	7
Snowmobiling	2
Fishing	2
Average # of ATVs owned	2.0
Average # of WI ATV trips taken in year	7.0

Visitor Spending – Non Local ATVs

The table below presents the annual spending for non local ATVs in the Northeast-South Region. All ATVs who live within this twelve-county region have been excluded from this annual spending. In other words, the expenditures below represent “new dollars” coming into this region from non local ATVs.

Annual Spending	
Lodging	\$336,226
Food/drink	564,112
Entertainment	415,093
Shopping	719,495
Gas/transportation	707,181
Convenience Stores	259,018
Gaming	103,773
Other	<u>1,176,098</u>
Annualized Total Visitor Spending	\$4,280,997

Average Individual Per Trip Spending

Lodging	\$24.30
Food/drink	40.77
Entertainment	30.00
Shopping	52.00
Gas/transportation	51.11
Convenience stores	18.72
Gaming	7.50
Other	<u>64.62</u>
Total	\$266.68



Appendices



2003 Wisconsin's ATV Riders Survey

Wisconsin Department of Tourism Co-Op Research Program

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

(Please check only one category.)

- 1 to ride the ATV trails in this area
2 to attend a special ATV event/festival
3 on a leisure trip in area (skip to #3)
4 visiting family and friends in the area (skip to #3)
5 on business or meeting in area (skip to #3)
6 other

Please explain

2. How did you find out about the trails or ATV event/festival in this region?

- Family/friends, Radio, Internet, Chamber of Commerce, Newspaper, State Tourism publication, Any other types of information?
TV, ATV Club, Magazine, Local tourism information, DNR, Brochure, Billboard, Travel show

Please explain

3. How far in advance did you plan this trip?

- 1 The day of the trip, 2 Day before the trip, 3 Within a week, 4 Within a month, 5 1-3 months before, 6 4-6 months before, 7 More than 6 months

4. Is this an "overnight" trip from home?

- 1 No - returning home today (Skip to #7)
2 Yes - What type of lodging are you using:
3 Hotel/Motel, 4 Camp (RV), 5 Camp (Tent), 6 2nd home/vacation, 7 Friend/relative, 8 Rent cabin, 9 B&B, 10 Resort, 11 Other type

5. Where are your lodging accommodations?

City

6. On this trip, how many nights will you be away from home?

7. How many ATV trips similar to this one, do you take in Wisconsin a year?

8. Please check other activities that you or members of your immediate travel group will participate in while you're on this trip.

- Shopping, Visiting family/friends, ATV races, Museums/historic sites, Festival/event, Other, Dining, Casino, Area attractions, Water Sports, Auto races

Please explain

9. Including yourself, how many people are in your immediate travel group?

10. How many in your group are 15 years old or less?

11. Who came on this trip with you?

- 1 no one, 2 family only, 3 friends only, 4 both family & friends, 5 club outing, 6 organized group

12. Could you estimate the dollars that you yourself have spent or plan on spending on this trip?

- Lodging accommodations, Food & drink at area restaurants/bars, Area entertainment, admissions, etc., Shopping (souvenirs, gifts, clothing), Gas, parking, repairs, Convenience stores, Transportation to area, Gaming/sweepstakes, Other

13. With respect to your ride, please rate your level of importance with 5 being very important and 1 being not at all important:

Table with 7 columns: Very (5), Some what (4), Neither (3), Not Very (2), Not At All (1), D/K (0). Rows include Riding with family, Riding with friends, Scenery, Length of ride, Exploring new areas, Relaxation, Riding trails only, Access to intensive use areas, Restaurants/entertainment located on trail system, Trail signage, Trail safety, Variety of terrain.

14. Do you ride your ATV in Wisconsin in the winter?

- 1 Yes, 2 No. If yes, what is the closest city and/or trail name? If no, why not?

15. Do you rent or own the ATV you ride? Rent Own

If you own, how many ATVs do you own?

16. If you own ATVs, how do you use them? (Please check all that apply.)

- On the farm/at home, Fishing/ice fishing, Trail riding, Hunting, Racing

17. In the last 12 months, how much have you spent on the purchase of an ATV, trailer, other ATV equipment or gear used for recreational purposes? \$

18. In order of importance, what are your three favorite leisure activities?

- 1st Choice, 2nd Choice, 3rd Choice

19. What information do you use when you plan your leisure trips? (Check all that apply.)

- Weekly newspaper, Weekly shopper, TV, Magazines, WI Tourism guides, Local tourism information, Daily newspaper, DNR, Internet, Radio, Billboards, Direct mail, Friends/relatives

Please explain

20. If there is anything that could be done to enhance your experience in this area, please explain.

21. What is your age? Gender? Male Female

22. Highest level of school you've completed?

- 1 Some high school, 2 High school graduate, 3 Some college/technical school, 4 Associate degree/certificate, 5 College degree, 6 Some graduate school, 7 Graduate degree, 8 Other

23. Which of these categories best describes your annual household income?

- 1 less than \$10,000, 2 \$10,000-\$20,000, 3 \$21,000-\$40,000, 4 \$41,000-\$60,000, 5 \$61,000-\$80,000, 6 \$81,000-\$100,000, 7 \$100,000 or more, 8 Prefer not to answer

24. Please indicate your state, county and zip code.

State County Zip