A photograph of three people hiking in a forest during autumn. The trees have yellow and orange leaves. One person in the foreground is wearing a blue quilted vest and headphones. Another person is in the background, wearing a dark jacket and a yellow jacket draped over their shoulder, reaching up to touch a tree trunk. A third person is in the middle ground, wearing a light grey jacket and blue pants, looking up and smiling. The ground is covered in fallen leaves.

# AN ANALYSIS OF ICE AGE TRAIL USERS

**PREPARED FOR THE ICE AGE TRAIL ALLIANCE**

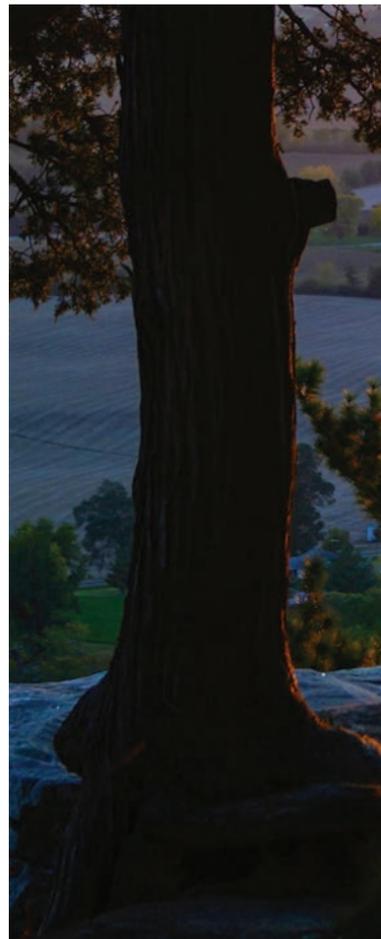
BY THE FISCAL AND ECONOMIC RESEARCH CENTER UNIVERSITY OF WISCONSIN-WHITewater

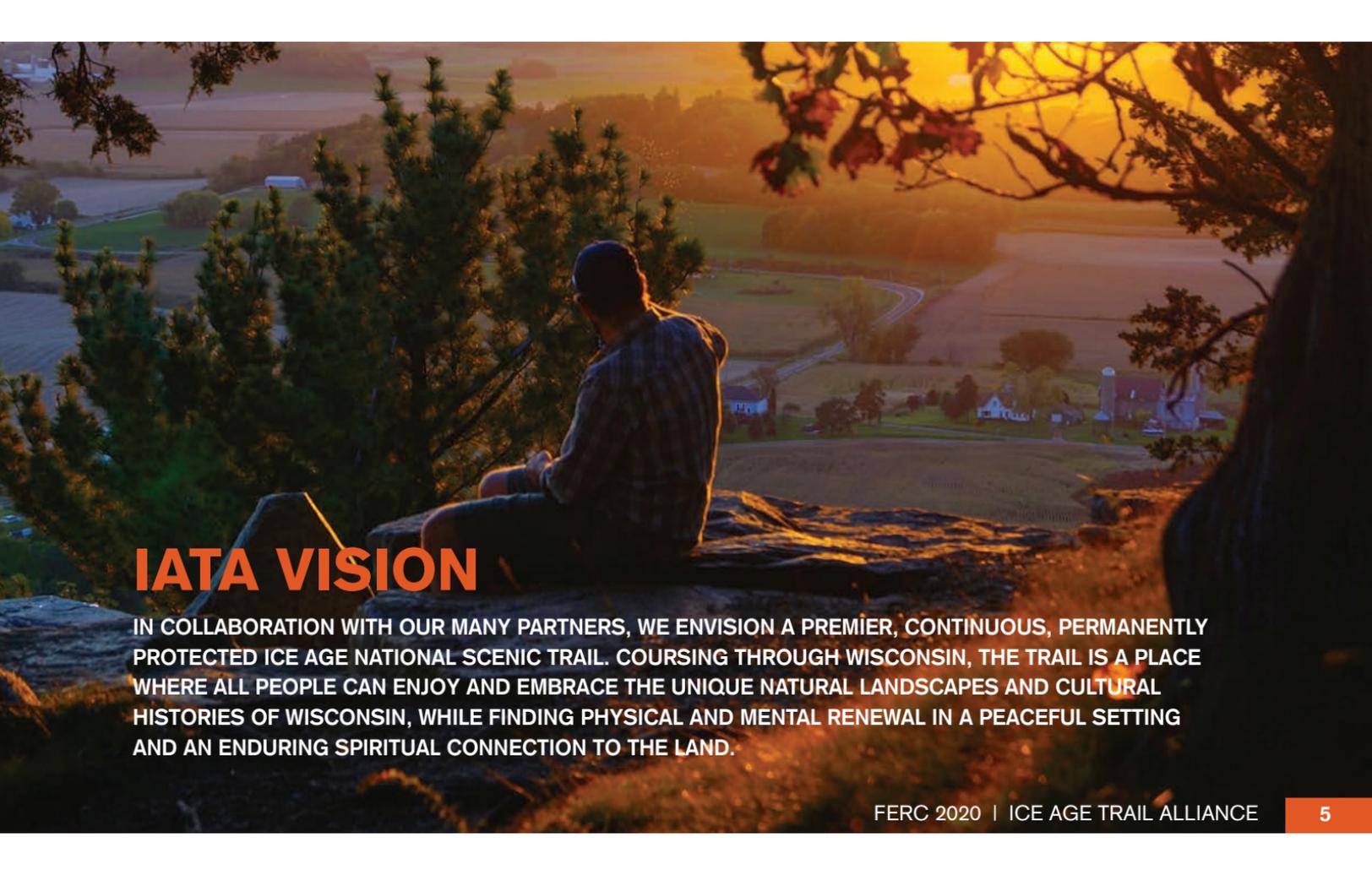
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# ABOUT THE ICE AGE TRAIL ALLIANCE

The Ice Age Trail Alliance (IATA) in partnership with the Fiscal and Economic Research Center (FERC) at the University of Wisconsin-Whitewater analyzed and quantified the economic impact of the Ice Age Trail. The objective of this study is to measure the annual economic impact of the Ice Age Trail to the State of Wisconsin and the local Trail communities by determining the annual number of users who utilize the Trail. The consideration of a variety of factors is necessary to accurately portray the true impact of Trail users on the local economies and Wisconsin's economy as a whole. More than 4,000 surveys were collected and used to quantify the monetary impact on local economies and for the Wisconsin economy as a whole by analyzing the average expenditures of Trail users. Additional methods applied were the IMPLAN input/output technique along with other statistical analyses which are discussed further in the report.



A person is sitting on a large rock, looking out over a scenic rural landscape at sunset. The sun is low on the horizon, casting a warm, golden glow over the fields and trees. In the distance, there are rolling hills, a winding road, and a small farmstead with a white house and a red barn. The foreground is dominated by the dark silhouette of a pine tree on the left and the back of the person sitting on the rock. The overall mood is peaceful and contemplative.

## IATA VISION

IN COLLABORATION WITH OUR MANY PARTNERS, WE ENVISION A PREMIER, CONTINUOUS, PERMANENTLY PROTECTED ICE AGE NATIONAL SCENIC TRAIL. COURSING THROUGH WISCONSIN, THE TRAIL IS A PLACE WHERE ALL PEOPLE CAN ENJOY AND EMBRACE THE UNIQUE NATURAL LANDSCAPES AND CULTURAL HISTORIES OF WISCONSIN, WHILE FINDING PHYSICAL AND MENTAL RENEWAL IN A PEACEFUL SETTING AND AN ENDURING SPIRITUAL CONNECTION TO THE LAND.

# TOURISM IN WISCONSIN

According to “Tourism Economics”, an Oxford economics company, Wisconsin tourism saw total business sales eclipse of **\$21 billion** in 2018. The state had over **112 million people visit** in 2018, as visitors per year continued to increase between 1.9% and 2.8% for the last five (5) years.

**\$13.3 billion** was spent by tourists in 2018 an increase of 4.7% from 2017 as there was an increase in total visitation along with an increase in tourism prices.

Visitors to the state of Wisconsin generated **\$1.2 billion in federal taxes** and **\$1.6 billion in state and local taxes**, which resulted in the average Wisconsin household saving \$680 due to tourism.

In addition, for every \$1 spent on advertising for state tourism **\$7 was returned** to the state in the form of tax revenue and **\$89 in the form of visitor spending**.

## VISITOR NUMBERS



There are an estimated  
**2,300,000**  
**VISITORS**

to the Ice Age Trail annually,  
which is up from 1,252,685  
based on a 2011 survey.

---



**514**

respondents indicated  
they volunteered their time  
to the upkeep of the Trail.

## PROJECT BACKGROUND

The Ice Age Trail Alliance, which is headquartered in Cross Plains has the responsibility of creating, supporting and protecting one of only eleven National Scenic Trails in the United States. This stunning thousand-mile footpath is the remnants of a colossal movement of glacial ice which left behind one of the world's premium examples of glaciation.

The research objective of this project is to quantify the value local businesses and Wisconsin received from users on the Ice Age Trail along with the people who volunteered their time to maintain and build various segments of the Trail.

# WHO USES THE TRAIL?



**College Degree  
and High School  
Level Education**



Make more than the median income in the United States (\$40k), **have discretionary income.**



**80%,  
30+ Age Years Old**  
(Gen X, Older Millennial,  
Baby Boomer)



**66%** not WI residents,  
33 average visits/year,  
**14% volunteer** with the  
Ice Age Trail Alliance



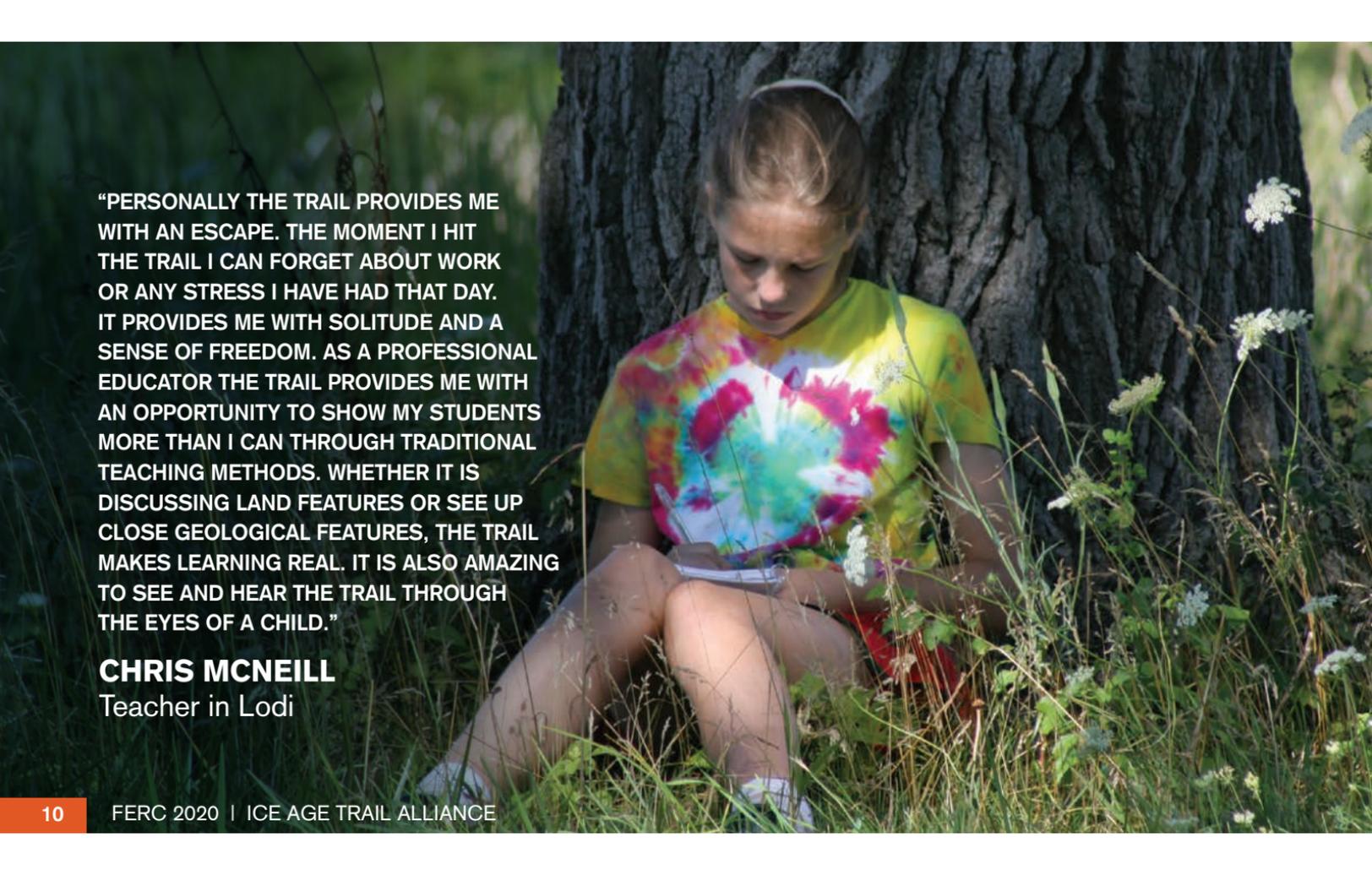
# 83% ENJOY THE OUTDOORS

People visit the Trail to enjoy the outdoors as a way for a retreat, leisure and as an educational opportunity.

---

# 82% WILLING TO TRAVEL

Many of the consumers are willing to travel from out of town or further to visit the Trail



“PERSONALLY THE TRAIL PROVIDES ME WITH AN ESCAPE. THE MOMENT I HIT THE TRAIL I CAN FORGET ABOUT WORK OR ANY STRESS I HAVE HAD THAT DAY. IT PROVIDES ME WITH SOLITUDE AND A SENSE OF FREEDOM. AS A PROFESSIONAL EDUCATOR THE TRAIL PROVIDES ME WITH AN OPPORTUNITY TO SHOW MY STUDENTS MORE THAN I CAN THROUGH TRADITIONAL TEACHING METHODS. WHETHER IT IS DISCUSSING LAND FEATURES OR SEE UP CLOSE GEOLOGICAL FEATURES, THE TRAIL MAKES LEARNING REAL. IT IS ALSO AMAZING TO SEE AND HEAR THE TRAIL THROUGH THE EYES OF A CHILD.”

**CHRIS MCNEILL**

Teacher in Lodi



## WORD OF MOUTH

# 54%

54% heard of the Trail through friends or family.  
Other ways include through tourism publications  
(i.e. being featured in their headlines.)

## MAJORITY TRAVEL IN GROUPS

# AVERAGE GROUP SIZE OF 2-4

People who hike or visit the Trail travel in groups of 2-4, occasionally they visit alone.

# HOW IS IT USED?



Hike or Enjoy  
The Outdoors



Wellness  
and Fitness



Sports and  
Recreation



Niche - Fishing  
and Bird Watching

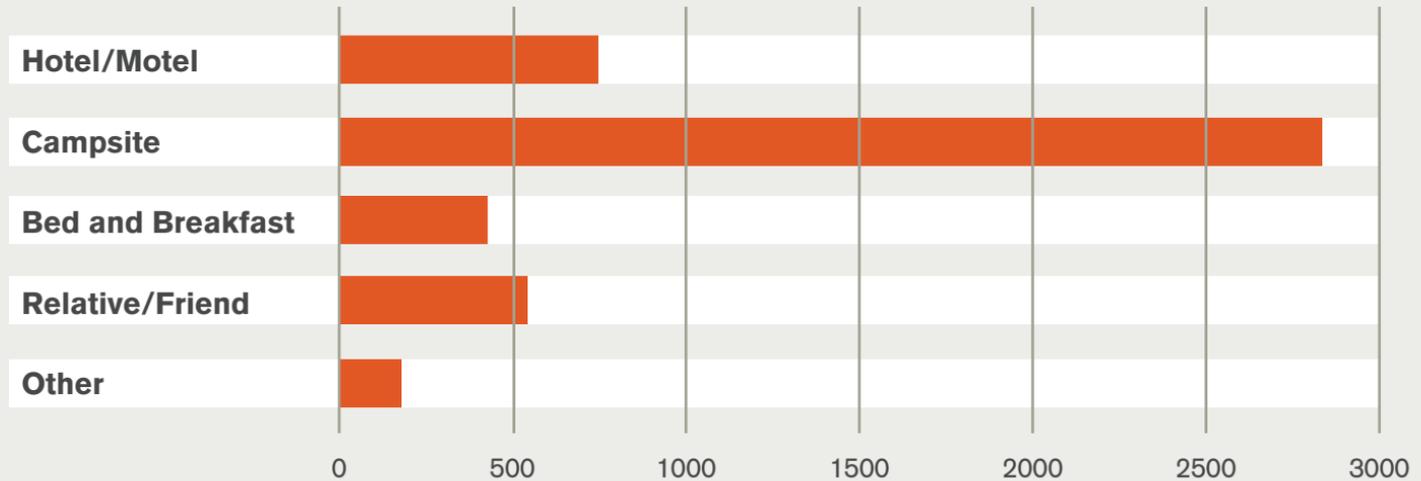
## Overnight in Campsites

Most people who stay overnight tend to use campsites

## Half Stay Overnight

Approximately half (46%) of the people who visit the Trail end up staying through the night or plan an overnight trip.

# IF YOU WERE TO STAY OVERNIGHT, WHAT TYPE OF LODGING WOULD YOU UTILIZE?



# WHAT MATTERS TO THEM

## Natural, Peaceful and Scenic

These three descriptors are what they emphasize about the Trail. Overall, they value these types of experiences.

## Word of Mouth

Most people hear about or choose to use the Trail because of word of mouth or connections with others close to them.

## Summer and Fall

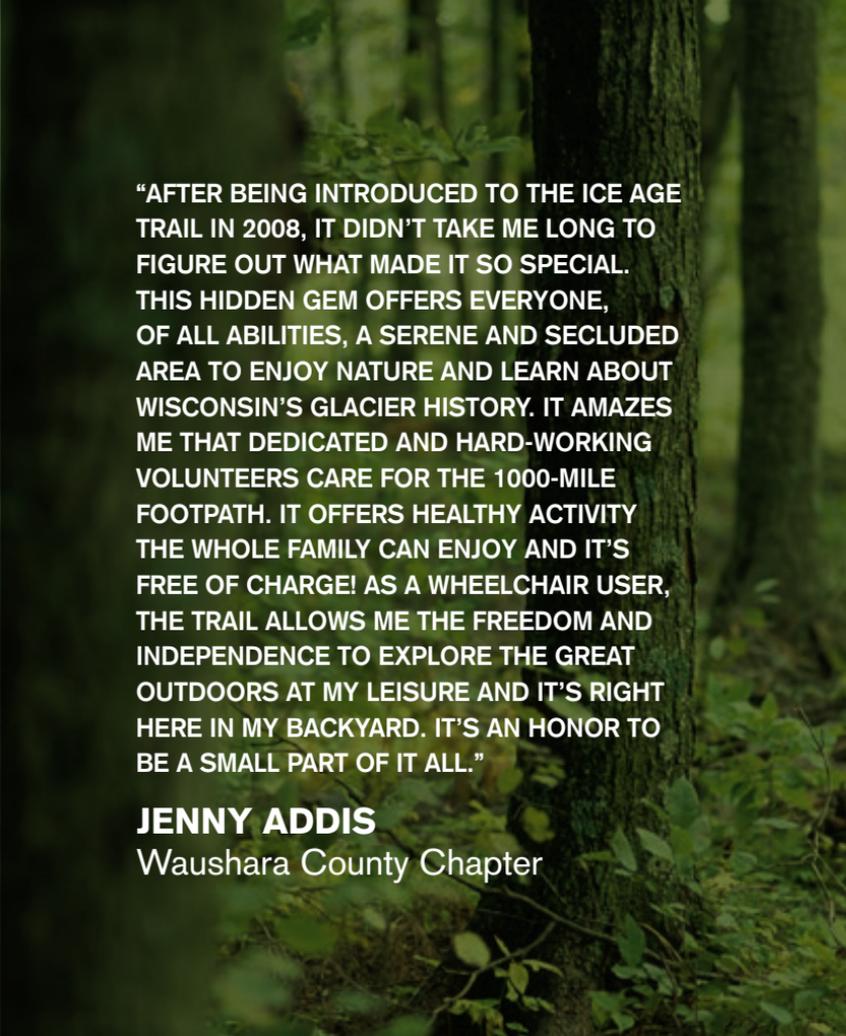
They enjoy the use of the Trail particularly in Summer and Fall, promoting events during this time would be most effective.

## Friends and Family

The group sometimes explores the Trail alone, but typically in couples (2). Groups consist of 1-4 people, mainly friends and family.

## Discretionary Income

Willing to spend money on what matters to them and will maximize their enjoyment.



“AFTER BEING INTRODUCED TO THE ICE AGE TRAIL IN 2008, IT DIDN'T TAKE ME LONG TO FIGURE OUT WHAT MADE IT SO SPECIAL. THIS HIDDEN GEM OFFERS EVERYONE, OF ALL ABILITIES, A SERENE AND SECLUDED AREA TO ENJOY NATURE AND LEARN ABOUT WISCONSIN'S GLACIER HISTORY. IT AMAZES ME THAT DEDICATED AND HARD-WORKING VOLUNTEERS CARE FOR THE 1000-MILE FOOTPATH. IT OFFERS HEALTHY ACTIVITY THE WHOLE FAMILY CAN ENJOY AND IT'S FREE OF CHARGE! AS A WHEELCHAIR USER, THE TRAIL ALLOWS ME THE FREEDOM AND INDEPENDENCE TO EXPLORE THE GREAT OUTDOORS AT MY LEISURE AND IT'S RIGHT HERE IN MY BACKYARD. IT'S AN HONOR TO BE A SMALL PART OF IT ALL.”

**JENNY ADDIS**

Waushara County Chapter

# NICHE GROUPS

## 15 Visits a Year

Niche groups (fishing, birdwatching) visit the Trail 15 times on average, versus the average number of the typical person, 11 times a year.

## 80% are 30+

Majority of the groups who visit are adults.

# WHERE THEY DIVERGE

## High Intensity

Adventurous, engaging terrain looking for the ability to enjoy the Trail through active engagement i.e. (running, cycling, kayaking, cross country skiing.)

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Willing to pay premiums for activities that emphasize this aspect and are the backbone of “adventure” economy.

---

Use the Trail more than any other group, 3-4 more times on average than anyone else.

## Low Intensity

Relaxing, retreat, educational opportunity looking to “take in nature” on their own time.

---

Engage with the Trail fewer times on average, but are focused on relaxation and leisure willing to pay twice as much for souvenirs/shopping and entertainment experiences (around \$5 more.)

---

Make smaller purchases, but consistently

# PERSONAS



## Rebecca Lewis

### High Intensity

Rebecca lives for adventure, so much so that she made a whole group dedicated to their love of exploring nature. Her Trail is the Ice Age Trail because she doesn't have to travel far for a session of backpacking. She buys fairly expensive equipment to ensure she is able to engage with the Trail at her highest level. Sometimes she even goes multiple times a week, both with others and by herself. She loves getting a retreat from every day life and exercises through her hikes.



## Daniel Hernandez

### Low Intensity

Daniel loves the Ice Age Trail because he gets to spend time with his wife on the Trail while they listen to the birds chirping. They visit the same park and have passes to their favorite attractions on the Trail. Every year they collect the park's annual paper/magazine and send it out to their kids in other states.

# HOW THEY SPEND

	High Intensity	Low Intensity
Convenient/Grocery	10.1%	12.7%
Misc./Equipment	23.6%	5.1%
Shopping/Souvenirs	2.6%	6.3%
Overnight Accommodations	22.3%	30.5%
Restaurants/Bars	17.5%	15.9%
Entertainment	3.2%	6.7%
Gas/Travel	20.6%	22.8%
	<b>\$173 Average</b>	<b>\$156 Average</b>

# THE ECONOMIC IMPACT

**3,616**

**FULL-TIME  
EQUIVALENT JOBS**

**\$27**

**MILLION IN STATE  
AND LOCAL TAXES**

**\$355**

**MILLION IN ANNUAL  
ECONOMIC IMPACT**

**OVER \$106**

**MILLION IN  
TOTAL WAGES**

# HOW WE CALCULATED

## IMPLAN Analysis

It uses the following three effects to measure economic impact:

**Direct Effect** - Refers to production change associated with a change in demand for the good itself. It is the initial impact on the economy, which is exogenous to the model. In this case, it is the spending brought about by the businesses around the Trail.

**Indirect Effect** - Refers to the secondary impact caused by changing input needs of directly affected industries (e.g. additional input purchases to produce additional output.) It concerns inter-industry transactions: The businesses around the Trail have a demand for locally produced materials needed to procure their services. The success of these businesses affects all of the suppliers that provide inputs.

**Induced Effect** - Is caused by changes in household spending due to the additional employment generated by direct and indirect effects. The induced effect measures the effects of the changes in household income: those individuals working at the businesses around the Trail and the suppliers of those businesses spend money at restaurants, grocery stores and shops.

**IMPLAN (short for “Impact Analysis for Planning”)**

is an economic analysis software system utilized to study the average survey responses.

# RECOMMENDATIONS



## Connect

Build a system to allow like-minded individuals to connect with each other. Facebook Groups can be advertised.



## Communicate

Advertise entertainment, potentially collectibles, to low intensity individuals. Email them opportunities to engage with the Trail through their interests.



## Collect

Start gathering data consistently and annually, other Trail data is few and far between. There is a great opportunity to get further ahead of other Trail services.

# IMPLEMENTATION

## Idea One

Create a Trail “collectible”, one that can be annual for those to collect each year, or a seasonal item. Example: “I went to the Ice Age Trail Summer 2020, I luv the Ice Age Trail.”

## Idea Two

Open opportunities for revenue generation through the shopping/entertainment focus of low intensity individuals.

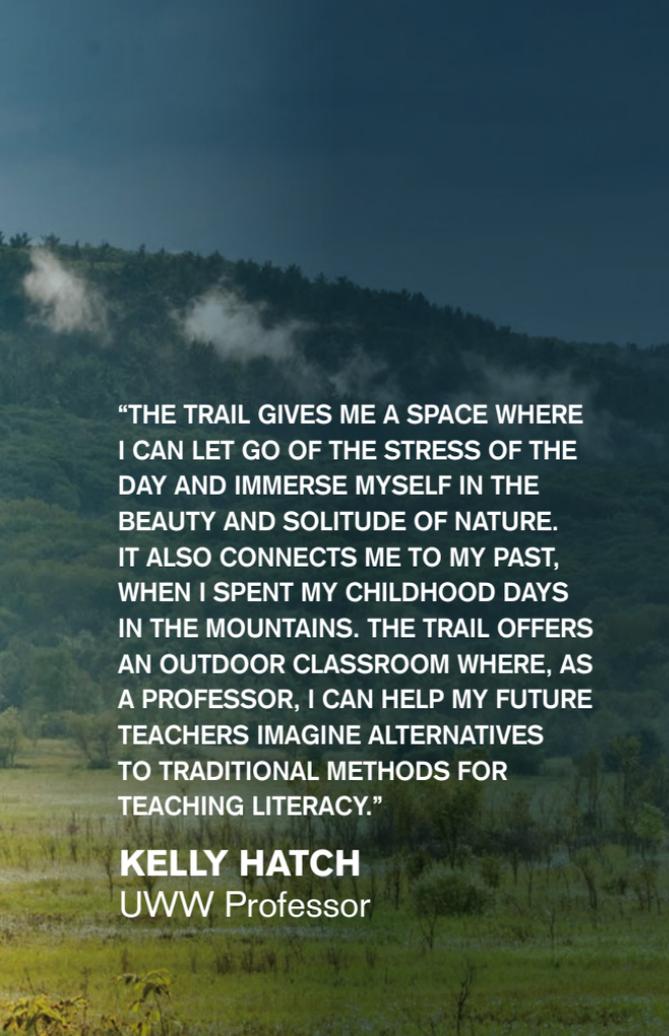
## Idea Three

Integrate and promote initiatives with the Ice Age Trail Communities.

## Idea Four

Open opportunities for revenue generation by targeting the “Other” category for high intensity individuals, what is it that they are willing to spend so much money on?





“THE TRAIL GIVES ME A SPACE WHERE I CAN LET GO OF THE STRESS OF THE DAY AND IMMERSE MYSELF IN THE BEAUTY AND SOLITUDE OF NATURE. IT ALSO CONNECTS ME TO MY PAST, WHEN I SPENT MY CHILDHOOD DAYS IN THE MOUNTAINS. THE TRAIL OFFERS AN OUTDOOR CLASSROOM WHERE, AS A PROFESSOR, I CAN HELP MY FUTURE TEACHERS IMAGINE ALTERNATIVES TO TRADITIONAL METHODS FOR TEACHING LITERACY.”

**KELLY HATCH**  
UWW Professor

# A SPECIAL THANKS TO THE VOLUNTEERS

The Ice Age National Scenic Trail is built, supported, and maintained by the Ice Age Trail Alliance (IATA) and hundreds of passionate volunteers. They donate thousands of hours of time every year to care for the Trail, lead hikes and field trips, and connect with communities near the Trail. In fact, without the volunteers, the Ice Age Trail would just be another line on a map.

## 2019 Yearly Achievements

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**2,376 Dedicated Volunteers**

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**82,880 Volunteer Hours**

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**4,561 Little Boots on the Trail**

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**232 Acres Protected**

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**22,064 Feet of Tread Built**



University of Wisconsin  
**Whitewater**

College of Business and Economics

Fiscal and Economic Research Center

## About the Fiscal and Economic Research Center

The University of Wisconsin-Whitewater Fiscal and Economic Research Center provides research services to area businesses, not-for-profit organizations and government entities, including:

- Economic Analysis
- Land-use Planning
- Geographic Information Systems (GIS) Analysis
- Market Research, Marketing Strategy and Planning
- Statistical Analysis
- Simulation Analysis
- Ecological and Biological Analysis
- Government and Public Policy Analysis
- Entrepreneurship
- Economic Forecasting and Business Development

## Data Analysis

**Arek Kashian and Sid Singh**

## Data Collection and Entry

**Kejuane Jennings**

## Survey Design

**Edel Contreras**

## Project Management

**Dan Fink**

## Final Report and Coordination

**Caleb Basu**

**Dr. Choton Basu, Ph.D.**

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**Dr. Matthew Winden, (Ph.D.)**

Assistant Director, FERC



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**For More Information** A full version of the Economic and Fiscal Impact of Wisconsin's Brownfields Investments, complete with methodology, documentation, footnotes and appendices, is available at [www.uww.edu/ferc/completed](http://www.uww.edu/ferc/completed)