Forestry Education & Awareness Center Adult Audience Market Analysis Study

Final Report – Draft

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by

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I. Executive Summary

The Wisconsin DNR's Division of Forestry plans to purchase a 67-acre site in Waukesha County for a Forestry Education and Awareness Center. This site supplies a unique opportunity to provide a demonstration forest right in the heart of the largest urban population in Wisconsin. The Center will help Wisconsin residents understand the sustainable forestry message, as well as promote awareness of the:

- importance of wood and wood products in our daily lives,
- environmental benefits of Wisconsin forests,
- social and consumer demands of Southeastern Wisconsin residents on the forest resource,
- importance of forests in the Milwaukee-area economy,
- interesting work foresters do and the opportunities in that profession and other forestry professions, and
- value of sustainable forestry for addressing both current and future needs of society.

An important focus of the Center will be to provide activities and programs that will meet the needs of both K-12 students and teachers, as well as adult residents of all ages from all walks of life. The DNR Division of Forestry has already completed an educational analysis that provides data and guidance regarding the K-12 audience. This study is a market analysis of the potential Southeastern Wisconsin adult audiences beyond those that are members of forestry organizations, government units, educational groups and community organizations that are likely to partner with the DNR Division of Forestry to plan, build and manage the facility. Overall objective of this analysis is threefold: 1) provide insights about the demand side scope and size of the market, 2) look at the supply of competing attractions to determine a market niche for the Center, and 3) identify trends, strengths, weaknesses, opportunities and threats that might impact the Center's success.

The research methods employed to gather the necessary secondary and primary data include: 1) obtaining 2000 Census and population projections, 2) interviewing the administrators of 59 forestry centers, nature centers, parks, museums and other facilities, 3) conducting 1,000 telephone interviews with residents, 4) developing lifestyle profiles using Claritas data of likely visitors, and 5) doing an inventory of the competing facilities and attractions that offer meeting space. The results of the quantitative survey are projectable to the adult population ages 18-75 living within the 9-county Southeastern Wisconsin market area at the 95% confidence level within a ± 3% error range.

1. Demand Side Market Analysis

a. Potential demographic and geographic scope of the target market

- The closer potential visitors are to the Forestry Center, the more likely they are to visit it. As a result, the Center is more likely to attract an urban oriented audience rather than a more rural focused audience.

- More frequent visitors of forested areas, those who typically go to parks' visitor centers, more educated respondents, those with middle and high incomes, and females are more likely than their counterparts to visit the proposed Forestry Center.

- When looking at Claritas PRIZM Groups, the groups that are the most likely to visit the Center reside in Milwaukee County. When looking at market segments, nearly one-half (48%) of Milwaukee County residents are classified into the Primary Market segment.

b. Defining target segments of the market

- Market segments are defined by likelihood of visiting the Center, frequency of visitation to forested areas, visitation to visitor centers, and level of agreement with statements about themselves pertaining to forestry. The segments we identified and their proportion of the total market include:

  Primary (41%) – These are active nature lovers, characterized by high level of visitation to forested areas and visitor centers, as well as other attractions in the Milwaukee area. They have a high level of agreement with statements about themselves related to the need for forestry education. As a result, they are highly likely to visit the Center.

  Secondary (32.6%) – This group are moderate nature lovers, who have a fairly high level of visitation to forested areas and agreement with statements about themselves related to the need for forestry education. However, they are only somewhat likely to visit the Center.

  Tertiary (26.4%) – This group consists of a lower level of visitation to forested areas and ratings given to statements about themselves related to the need for forestry education. They are split on the likelihood of visiting the Center.

- Market segments do not differ much demographically; rather, they are a reflection of individual attitudes and interest in nature and forestry. Those in the Secondary segment are somewhat older with somewhat higher incomes than those in the Primary and Tertiary segments, and those in the Primary and Secondary segments have a somewhat higher level of education that those in the Tertiary segment. The Primary segment consists of a larger proportion of Milwaukee County residents than do the Secondary and Tertiary segments.

- Additionally, Primary market segment members are more likely to visit other Milwaukee area attractions, expressed a higher level of interest in all attractions and activities listed that the Forestry Center may offer, tend to be more likely than members of the Secondary or Tertiary segments to value most amenities and services, and expressed a higher level of interest in topics related to forestry.

c. Resources – time and monetary – each segment would be willing to spend as a visitor to the Center

- Nearly all (95%) of those in the Primary segment would be willing to pay an admission fee to the Forestry Center, compared with 86% of those in the Secondary segment and 67% of those in the Tertiary segment. Primary segment respondents split among season pass or membership (33%), per person daily admission (30%), and per vehicle daily admission (30%) as the preferred method of payment, while Secondary and Tertiary segment members prefer a per person daily admission.

- Market segments do not differ in the amount they would be willing to spend for admission. The amounts that residents of Southeastern Wisconsin would be willing to pay and the admission costs given by administrators of forestry or other types of visitor centers are in agreement. The amounts to charge are $5.00 for a daily adult admission, $3.00 for a daily children's or student's admission, and $35.00 for an individual season pass or membership. Also, administrators indicated a median price of $45.00 for a family season pass or membership. Only three administrators gave a price for a daily vehicle admission, while residents of the area said they would be willing to pay a median of $10.00 per vehicle.

- The amount of time that visitors spend varies considerably and most likely depends on a number of variable factors, including weather and exhibits on display, as well as personal interest. The average number of minutes reported that people spend in the visitor or central attraction center is 58, with a median of 30. Responses range from a low of 5 minutes to a high of 240 minutes, or 4 hours. The average amount of time spent on the grounds is 1.95 hours, with a median of 1.50 hours. Responses range from a low of 20 minutes to a high of 6 hours.

d. Key interests of each target segment as related to natural resources

- Top activities enjoyed by all segments include traveling, visiting parks and natural sites, dining at a restaurant, reading, going to museums, and going to festivals and events. Most also enjoy gardening, camping, shopping, nightlife and live entertainment, fishing, attending professional sports events, and surfing the Internet . Only a minority enjoys hunting or snowmobiling for relaxation or recreation. The Primary segment is more likely than both the Secondary and Tertiary segments to enjoy going to festivals and events, reading, camping, visiting parks and natural sites, and going to museums. They are more likely than the Tertiary segment to enjoy dining at a restaurant, gardening, hunting, and traveling.

- The Primary market segment expressed a higher level of interest than both the Secondary and Tertiary segments for topics related to forestry, with the exception of “Caring for trees in my yard,” for which the Secondary segment showed an equally high level of interest. The forestry topics of most interest to the Primary segment are animals and the forest, protecting forests and what I can do, and forests available for recreation in Wisconsin. Topics also of high interest include ecological values of the forest, identifying trees and forest plants, forest ecosystems, caring for trees in my yard, controlling invasive plants/shrubs, ways wood can be recycled, forest sustainability, history of Wisconsin forests, and human impact and population growth. Other topics are of medium-high interest, while jobs in forestry is of medium interest to this segment.

- The top three forestry topics for the Secondary segment are forests available for recreation in Wisconsin, animals and the forest, and caring for trees in my yard, followed by protecting forests and what I can do.

e. Features to include in the Center to attract the desired segments; expectations of the target market for facility and woodlands

- The Primary segment expressed a higher level of interest in all attractions and activities listed than did both the Secondary and Tertiary segments. They showed the highest level of interest in guided educational walks through the woods and only a moderate level of interest in tree harvesting equipment. They showed a fairly high level of interest in all other attractions and activities listed. Trails or other outdoor attractions pertaining to the natural environment and hands-on attractions or activities were mentioned most often by administrators.

- Forestry-related attractions and activities are of moderate interest to the Secondary segment and of low to moderate interest to the Tertiary segment. Both are most interested in guided educational walks through the woods and performances in an outdoor amphitheater.

f. Facility needs (restrooms, food service, gift shop, etc.) of these visitors

- The majority of all respondents, including those in the Primary segment, feel that parking, portable toilets, and hiking trails are must-haves. The majority of respondents also feel that a picnic area, security staff, and exhibits are must-haves, although a fairly large proportion of the total indicated these amenities are simply nice to have. (The Primary segment feels these are must-haves.) While respondents were most likely to say that security fencing is a must-have (40%) feature, another 31% said it is not needed, and 30% said it is nice to have. The majority feels that a video game room is not needed. While, collectively, respondents said that a computer lab is not needed, those in the Primary segment split between nice to have and not needed. Other amenities and services are considered to be nice to have, or respondents were split on how much of a necessity these items are.

- Adult education classes and seminars (88%), space for meetings and events (88%), an education program director (78%), and special events to attract families (70%) are offered at most facilities according to their administrators. Fewer offer security personnel on premises (38%), food service on the premise (32%), public transportation to and from the facility (31%), or offices for environmental groups (17%).

g. Landscape and facility design considerations to make the Center inviting to the target market segments

- Facilities use natural materials to create an inviting entrance and reinforce the theme of their centers. Wood, stone, trees and native plants set an environmentally aesthetic tone. Water is also incorporated at times, but can present maintenance and safety concerns. Construction materials and methods also support the "green" theme.

- About 90%, or 53 of 59 administrators, said there is a main visitor or central attraction center. Of the 46 who gave a response, the average size of the main visitors or central attraction center is 16,782 square feet, with a median of 11,000 square feet. Responses range from a low of 1,000 to a high of 70,000 square feet. The main grounds cover an average of 3,178 acres, with a median of 229 acres, according to the 48 who provided a response. Responses range from a low of 2 acres to a high of 57,000 acres.

h. Other considerations to make the Center a highly-visited attraction

- About two-thirds (68%) of survey respondents expressed an interest in a season pass that would allow them to go to other visitor attractions in the Milwaukee area. More frequent visitors of forested areas, those who typically go to visitor centers, those who are more likely to go to the Forestry Center, those with children, younger respondents, and females are among those who are most interested in a season pass.

- Nearly nine in 10 (86%) of those in the Primary segment are interested in the season pass, compared with 60% of those in the Secondary segment and 49% of those in the Tertiary segment. Of the Primary segment, those with children living at home expressed more interest than did those without children.

- Of those who charge an admission fee and who responded, almost one-half (46%) of administrators said their facility partners with other facilities or attractions in offering a season pass.

- Of facilities that charge an admission and whose administrator provided a response, 83% offer an admission discount for school children, 69% offer an admission discount for senior citizens, 67% offer an admission discount for groups other than schools, 31% offer an admission discount for families, and 8% offer an admission discount for vehicle loads.

- Public transportation to and from the facility is available or offered by 31% of facilities, especially those in more urban areas, such as the World Forestry Center in Portland and the Milwaukee County Zoo.

i. Potential use of Center by area clubs or groups and their needs

- Over one-half (56%) of residents of Southeastern Wisconsin said rental space for meeting/events would be nice to have, while the rest split between must have and not needed. Those who visit forested areas, those who are more likely to visit the Forestry Center, and singles are among the groups who placed more value on this amenity than did their counterparts.

- The majority of administrators said their facility does offer rental space for meetings/events. Types of groups that use these facilities include schools, government, environmental groups, businesses, various clubs, and individuals for reunions, birthday parties, weddings, etc. Of the 35 who responded, 66% said income from rental of meeting and event space has met their expectations, while 34% said it has not met up to their expectations.

- Specific room sizes, catering kitchen, flexible seating, a/v equipment and other physical needs considerations are within the realm of architectural design.

2. Supply Side Market Analysis

a. Other visitor attractions in the Greater Milwaukee area that directly or indirectly target the same time and monetary resources of the target segments

- The Greater Milwaukee area offers a number of other visitor attractions. Over the last three years, the key facilities visited by the survey respondents include the Milwaukee County Zoo (74%), Milwaukee Public Museum (66%), Mitchell Park Conservatory Domes (49%), Milwaukee Art Center (47%), Boerner Botanical Gardens (47%), Betty Brinn Children's Museum (30%), Schlitz Audubon Nature Center (22%), Miller Brewery (16%) and the Wisconsin Lakes Schooner Education Association/Pier Wisconsin (10%).

- A July 2003 WI Department of Tourism survey of 340 Chicago and Minneapolis area visitors to the Milwaukee area showed that visitorship was highest for Festivals & Events (46%), Summerfest (32%), Milwaukee County Zoo (22%), Miller Brewery (19%), Milwaukee Public Museum (16%), Milwaukee Art Center (16%), Boerner Botanical Gardens (14%), and Mitchell Park Conservatory Domes (13%). One-half (50%) were visiting friends or relatives, three-fourths (77%) dined out, 48% went shopping, and 30% attended a professional sports events. Likelihood of going to these venues was higher among the Chicago residents.

- In 2002, travelers to Milwaukee, Waukesha, Kenosha and Racine counties spent $2.7 billion. Sixty-one percent of the visitors in Southeastern urban Wisconsin were on a leisure trip, 25% were on individual business trips, and 14% were attending meetings or conventions.

- The top activities enjoyed by the Primary segment include visiting parks and natural sites, traveling, dining at a restaurant, going to museum, reading and going to festivals and events. As a result, the Forestry Center will enjoy a unique niche among this group, as well as complement the interests of individuals who go to other top attractions in the area.

b. Recreational and educational opportunities related to natural resources offered by current facilities in Milwaukee County

- While many of the area facilities offer similar recreational opportunities, such as hiking, viewing wildlife and enjoying the outdoors, they all tend to concentrate on their own unique subject areas in providing educational opportunities. However, there tends to be more focus on school age programs and activities, even though there are some adult education efforts.

- It would be relatively easy to differentiate the Center's adult programming from other facilities.

c. Viable niche in the visitor industry of the Greater Milwaukee area for the Forestry Center

- There is clearly a viable niche for the Forestry Center, as indicated by the majority of residents being interested in learning more about Wisconsin's forests and the 45% who said they would be very interested in visiting the Center.

- About three-fourths (76% or 45 respondents) of the administrators feel there is a viable niche for the Forestry Center.

d. Other facilities in the Wauwatosa area offering space for meetings, conferences and special events. Analysis of need for additional rental space.

- A comprehensive audit of the facilities offering meeting space in the area indicates that there is probably not a need for additional rental space in the Wauwatosa and Greater Milwaukee area.

3. Feasibility Analysis

a. Segment(s) that will be good demographic and geographic targets for the Forestry Center, given the analysis of the demand and supply side of the marketplace

- The Primary market segment the Center should target are active nature lovers and families who already have a high level of visitation to forested areas and visitors centers, as well as other attractions in Milwaukee and Waukesha counties. Of special focus should be those less than age 35, singles and persons with no children who are among the most frequent visitors to forested areas, even though they are somewhat less likely to spend time in the Center.

- There are key PRIZM lifestyle groups that are more inclined to go to the Center, including the Urban Uptown, The Affluentials, Urban Midscale, Urban Cores and 2nd City Blues. There are sufficient numbers of these households in the Greater Milwaukee Area to provide substantial support for the Center.

b. Share of the time and monetary resources of the targeted segment(s) can/should the Forestry Center attempt to get in the context of the Greater Milwaukee marketplace

- The Center must use pro-forma projections of income and expenses rather than share of market figures due to the unique nature of the Center.

- Our analysis shows that the Center should draw an annual attendance, not including school related programs, of between 30,000 and 115,000 persons. Admission fees alone could generate $150,000 to $575,000 annually.

c. Number of visitors and events that the Forestry Center should target per year among the various geographic and demographic segments and recommended marketing budget for the Center

- Facility administrators indicated the average number of visitors per year is 193,376, with a median of 70,000. Responses range from a low of 2,000 to a high of 2,000,000 visitors per year. The average proportion of visitors is 27.1% in Spring, 34.0% in Summer, 23.9% in Autumn, and 14.5% in Winter. Average miles visitors travel is 56, with a median of 30. Responses range from a low of 2 miles to a high of 500 miles. An average of 19.5%, with a median of 10%, of visitors come from out-of-state. Responses range from a low of 1% to a high of 80%.

- Facility administrators indicated mean total annual revenue is $2,720,145, with a median of $300,000. Responses range from a low of $1,000 to a high of $80,000,000. Program fees and admission fees are the top sources of revenue listed, although no source listed had a majority of respondents rank it in the top three. Mean annual operating cost is $1,534,834, with a median of $400,000. Responses range from a low of $850 to a high of $24,000,000. Of those who responded, salaries and fringe benefits make up an average of 61.0% of operating costs, followed by maintenance and upkeep (26.1%), utilities (17.9%), insurance (6.9%), and marketing (4.6%). One-half (51%) refused to respond or said they have no marketing budget. Of those who did answer, the mean marketing budget is $122,165, and the median is $10,000. Responses range from a low of $500 to a high of $2,223,000.

- The marketing budget should be set at 5% of annual gross revenues, although a fixed first year budget of $25,000 to $50,000 should be allocated for the grand opening.

d. Best business model for Center (pay-as-you-use, subscription, memberships, etc.)

- Funding will need to be primarily by season pass/memberships and daily per person or vehicle fees. Daily admission should be $5.00 per adult, $3.00 per child or student and $10.00 per vehicle. The family season pass or membership should be $35. A season pass for the Center that would include other attractions would be popular with two-thirds of the residents.

- Four in 10 (40%) of those willing to pay an admission fee prefer a per person daily admission, while 32% said they prefer a per vehicle daily admission, and 24% prefer a season pass or membership. Only 4% said they have no preference. The trend points to moving away from preferring a per person daily admission towards preferring a season pass or membership as the frequency of visitation to forested areas increases and as the likelihood of going to visitor Centers in general and going to the proposed Forestry Center increases. While the Secondary and Tertiary segment members prefer a per person daily admission, those in the Primary segment split among all three forms of admission and were more likely than their counterparts to prefer the season pass or membership.

- While the preferred method of administrators who charge an admission fee is a per person daily admission, the majority also offer a family season pass or membership and an individual season pass or membership. Most do not charge a per vehicle daily admission. Both a per person daily admission and season passes or memberships should be offered to match the individual preferences of potential visitors.

e. Social and economic trends that could impact the success of the Forestry Center as a tourism destination for adult residents and visitors

   - Key trends that could positively impact the Center are increased interest in "green" construction, life-long learning among adults, taking short getaway vacations close to home, emphasis on quality of life at home, and increased awareness of the importance of renewable and sustainable resources.

   - Population growth in Waukesha County will continue upward.

   - Key trends that could negatively impact the Center include an aging population with fewer children, singles getting married later, loss of high paying manufacturing jobs, and an overall decline in the Milwaukee County population.

   - Employment growth in the Milwaukee metro area will continue to be slow.

f. Best channel to get message across

   - About one-third of all survey respondents cited brochures or direct mail as the best method of providing them with information about the Forestry Center. More than four in 10 of those in the Primary segment selected this method as their preferred way of receiving information.

   - Administrators cited newspapers and brochures or direct mail as the most effective media or channels for informing adults about their facility.

4. Recommendations

Based on the results and conclusions, we offer these recommendations for your consideration:

- Focus on the adult education aspects of the Center.
- Partner with rather than compete with other facilities and attractions.
- Do not build or position the Center as a full-service meeting and conference center.
- Target nature lovers and persons who live in the immediate Milwaukee area.
- Fund mainly by season pass/membership and daily per person or vehicle fees.

II. Introduction

The Wisconsin DNR's Division of Forestry plans to purchase a 67-acre site in Waukesha County for a Forestry Education and Awareness Center. This site supplies a unique opportunity to provide a demonstration forest right in the heart of the largest urban population in Wisconsin. The Center will help Wisconsin residents understand the sustainable forestry message, as well as promote awareness of the:

- importance of wood and wood products in our daily lives,
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An important focus of the Center will be to provide activities and programs that will meet the needs of both K-12 students and teachers, as well as adult residents of all ages from all walks of life. The DNR Division of Forestry has already completed an educational analysis that provides data and guidance regarding the K-12 audience.

A. Objectives

This study is a market analysis of the potential Southeastern Wisconsin adult audiences beyond those that are members of forestry organizations, government units, educational groups and community organizations that are likely to partner with the DNR Division of Forestry to plan, build and manage the facility. Overall objective of this analysis is threefold: 1) provide insights about the demand side scope and size of the market, 2) look at the supply of competing attractions to determine a market niche for the Center, and 3) identify trends, strengths, weaknesses, opportunities and threats that might impact the Center's success. Key questions we wanted the analysis to answer include:

1. Would a significant proportion of the adult population want to visit the Center?
2. What would attract adults to the Center?
3. What amenities and services must be included to serve adults?
4. What other Milwaukee area attractions do they visit?
5. What types of attractions and activities should be offered?
6. What kinds of forestry education topics would interest adults?
7. What would adults be willing to pay to visit the Center?

8. What is the best way to communicate with them about the Center?
9. What kinds of exhibits, activities and attractions are working for other forestry and visitor Centers?
10. What are the physical and operational features of similar facilities?
11. What are the financial aspects, such as admission type and costs?
12. What are the partnering opportunities?

B. Methodology

A combination of qualitative and quantitative methods was used to obtain the primary and secondary data needed to answer the questions. Demographic and trend data were provided by Claritas, Inc., a nationally recognized provider of demographic projections as well as the proprietary PRIZM market profiles. Various statistical techniques were used to analyze the data. Segmentation analysis in combination with the PRIZM profiles was used to identify, count and locate the target adult market segments.

Survey of Residents

A telephone survey of 1,000 randomly selected residents ages 18+ was conducted September 8-15, 2003. The questionnaire was developed and pretested by GKA, reviewed and approved by the client. The 12-minute interviews provided feedback from a representative cross-section of residents living in the urban counties of Milwaukee, Kenosha, Racine and Waukesha, as well as the more rural counties of Dodge, Jefferson, Ozaukee, Walworth and Washington. The urban counties accounted for 75.5% of the interviews, while the rural counties supplied 24.5% of the respondents.

Survey of Facilities

In-depth telephone interviews were conducted with representatives of 59 forestry or other visitor centers, including major competing facilities in the Greater Milwaukee market. We indicated upfront that we were doing a project for the Wisconsin DNR. The questionnaire included a combination of open-ended and closed-end questions designed to get feedback about the mission/purpose, facility characteristics, visitor characteristics, financial aspects, marketing channels and budget. This information was particularly valuable in refining what the new Center should do to attract adults, understanding the business aspects, looking at the need for transportation and other services, and assessing whether the Center could compete for a share of the public meeting and event space rental market.

Competitive Supply Analysis

There is no readily available inventory of meeting space in Milwaukee and Waukesha counties. As a result, we created our own database of these facilities by checking their Web sites, reviewing literature and calling facilities to verify information. Although comprehensive, the inventory that we provided may not exhaust all of the possibilities in the area. However, it does include those facilities that would likely attract meeting and space rental business away from the new Center. Some offer programs and activities that tangentially might duplicate what the Center could offer. However, the overall study revealed that a cooperative rather than a competitive position should be taken by the Center if it is to make the best use of its resources and enjoy the benefits of a shared marketing effort with the other facilities.

Population & Trends Analysis

Since changes in population numbers and composition, such as age cohorts, can impact the future success of the Center, we obtained current and projected demographics from Claritas, Inc. Additional input was gleaned via review of various secondary sources on the economic and social health of Southeastern Wisconsin.

Market Profiling

A multi-step process was used to profile the target market in terms of likelihood of going to the Center. First, a segmentation analysis of the responses from the 1,000 telephone interviews was used to identify the characteristics of the Primary, Secondary and Tertiary groups. Second, Claritas, Inc. coded the 1,000 individual respondents according to its 62 different lifestyle profiles. Third, further segmentation analysis revealed the top five lifestyle groups and the clusters correlated with them in relation to likelihood of visiting the Center. Fourth, Claritas then mapped the location of those groups that include households most likely to visit the Center. As a result of this segmentation and identification process, we are able to target those households by demographics, lifestyle group and geographic location. Claritas, Inc. can later provide the Center with the names, addresses and phone numbers of households that meet the desired profile in these areas.

III. Population Trends & Attendance Projections

The market survey and segmentation analysis showed that a large proportion of the potential attendees will come from the immediate area, especially Milwaukee and Waukesha Counties. Likewise, the Claritas PRIZM lifestyle analysis identified the groups that are most likely to visit the Center, as well as the number of those households within the total market area. A careful review of the Claritas Demographic Trend and Household Trend tables for the total market area and the individual counties in the appendix may provide additional useful insights.

A. Population Trends

A key metric to use in evaluating the trends in population and their potential impact on attendance at the Center is number of families in the market area. While younger single and older senior adults are very important audiences, too, families are the key target audience for most competing facilities. Also, proximity to the Center is important in that positive or negative changes in the total population and number of families in nearby counties are more important than those that occur further away from the Center. Based on the 2000 Census and population projections prepared by Claritas, Inc., there is both good and bad news, as indicated by these trends between 2003 and 2008:

- The overall population in the 9-county area is expected to increase by only 2%, going from 2,117,329 million up to 2,158,871.

- The number of households in the 9-county area is expected to increase by 4% from 828,153 up to 861,287. However, average household size will decline about 2% down to 2.44 persons. The number of families will increase 2.5% over the next five years from 543,354 up to 556,984.

- Aggregate household income is expected to increase by 20%, going from $54,017 up to $64,889. This is good news because higher income households are more likely to visit the Center.

- The number of persons ages 21 and older is expected to grow by 3% to 1,534,199 during the 5-year span, while those ages 65+ will increase by 13% to 282,115.

- In contrast to the overall market area, Milwaukee County will continue to see a decline in total population by dropping 1.3% from 933,539 in 2003 down to 921,196 by 2008. The number of households will increase slightly, going from 378,581 up to 379,487. Since Milwaukee County now accounts for roughly 46% of the households in the total market area, slow or no growth in households could have a negative future impact on the Center's attendance.

- Waukesha County will continue to see strong growth in both population and the number of households. The population will increase by 5%, going from 371,866 up to 391,337 in 2008. Likewise, the number of households will move up 8.5% from 142,196 to 154,207. The number of families will jump 6.5% from 104,573 up to 111,407.

- Waukesha County will also see a surge in average household income, going from its current $87,124 up to $100,060.

- Other counties in the market area that will witness strong growth in the number of families include Washington (8.6%), Jefferson (6.0%), Kenosha (5.6%) and Ozaukee (5.0%). Walworth (4.4%) and Dodge (3.8%) counties will experience moderate growth.

- Those counties that will have slow or no growth in the number of families include Milwaukee (2.5%) and Racine (1.3%) counties.

B. Other Trends

A review of literature and research indicates that other trends that need to be considered in developing programs, activities and services for adults include:

1. Life-long learning among adults that will dovetail nicely with an increasingly older, healthier population.

2. Taking short getaway vacations close to home which will allow the Center to draw visitors from Wisconsin, as well as Chicago area residents.

3. A renewed emphasis on quality of life at home whereby residents want to enjoy family and friends in their own neighborhood and community.

4. Increased awareness of the importance of renewable and sustainable resources in providing energy and materials for building homes.

5. Increased interest in and adoption of "green" construction techniques and standards.

6. Loss of high paying manufacturing jobs that results in lower household incomes.

7. Singles getting married at an older age which delays the formation of families.

C. Attendance Projections

Although it is always difficult to make precise predictions of what level of attendance the Center might expect from the marketplace, the primary survey research, segmentation analysis and secondary census data have provided us with some good insights. Likewise, the Claritas PRIZM lifestyle households that largely represent the Primary segment of the market that is very likely to visit the Center are heavily concentrated in Milwaukee County.

As a starting point, the facilities we contacted reported a median of 70,000 visitors annually, with half drawing more and half drawing fewer visitors. The Forest Discovery Center attracts 15,000, while the Forest History Center draws 18,000. The Cradle of Forestry reported 60,000 visitors. The World Forestry Center now draws 35,000 visitors, but expects that figure to increase to 150,000 annually following a $7 million renovation. Its previous high annual attendance was 90,000 visitors.

In Milwaukee, Discovery World draws 130,000, compared with 200,000 for Boerner Botanical Gardens, 538,764 for the Milwaukee Art Museum, and over 1,000,000 each for the Milwaukee Public Museum and Milwaukee County Zoo. The Schlitz Audubon Nature Center reported 70,000 visitors, and Mitchell Park Horticultural Conservancy had 214,000 visitors.

There are 298,466 households in the total market area that fit the Claritas lifestyle profiles of likely visitors, including 256,165 in Milwaukee County and 12,233 in Waukesha County. These households represent about one-third of the households in the 9-county market area. Four in 10 of the market survey respondents said they would be very likely to visit the Center, and 41% of the respondents fall in the Primary market segment. While not all of these households will visit every year, others will make multiple visits each year. Also, there will be some visitorship from out-of-area visitors.

We estimate the Center would attract between 30,000 and 115,000 visitors annually just from the Southeastern Wisconsin market area. These figures are based on the assumption that there are roughly 300,000 qualified (likely to visit) households in the 9-county area, according to the Claritas lifestyle profiles. Total population in those households at 2.5 persons each would mean about 750,000 potential individual visitors of all ages. If the Center attracts only 4% of those persons annually, the total would be 30,000. If the Center attracts 10%, there will be 75,000 one-time visitors. In order to reach an attendance of 115,000, the Center would need to draw 20%. These may be conservative estimates, but they also reflect the experience of other facilities, such as the World Forestry Center which draws 35,000 persons and the Schlitz Audubon Nature Center that attracts 70,000 annually, as well as the fact that weather can impact attendance. Keep in mind that the first year’s attendance might be artificially high due to the Center’s being a new attraction. Also, we have not included any visits from school groups, but have focused on households with singles and families that will visit throughout the year. Persons with memberships and season passes might visit more often.