

Baraboo River Corridor

Branding and Marketing Study

January 2018



ACKNOWLEDGMENTS

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Cover Photo Credit: miles paddled.com

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“...PERHAPS OUR GRANDSONS, HAVING NEVER SEEN A WILD RIVER, WILL NEVER MISS THE CHANCE TO SET A CANOE IN SINGING WATERS...GLAD I SHALL NEVER BE YOUNG WITHOUT WILD COUNTRY TO BE YOUNG IN.”

-ALDO LEOPOLD, A SAND COUNTY ALMANAC

OVERVIEW

STUDY PURPOSE

The purpose of this project is to establish a brand identity, marketing strategy and metrics to track the establishment of the Baraboo River Corridor as a recreation tourism destination.

DATA COLLECTION & ANALYSIS

This study features data from the following measures of activity related to outdoor recreation in general, and/or the Baraboo River Corridor in particular:

- Sporting goods retail sales data in the study area
- An inventory of lodging opportunities
- River and trail usage statistics based on photo data collection
- User data provided by outfitters operating in the study area

This study also featured the demonstration and refinement of a mobile device application, Strive On, to enhance the visitor experience. Its use and potential uses are described.



FINDINGS

RECREATION RESOURCES AND AMENITIES

The Baraboo River watershed is rich with public recreation opportunities. In addition to the river itself, there are more than twenty sites, lakes and trails offering a range of recreation activities.

- Baraboo River Floodplain Forest State Natural Area
- Lost Lake State Natural Area
- Pine Island Savanna State Natural Area
- Lower Narrows State Natural Area
- Ableman's Gorge Natural Area
- Parfrey's Glen State Natural Area
- Devil's Lake State Park
- Pewits Nest State Natural Area
- Cady's Marsh State Natural Area
- Seeley Lake
- Popple Nature Area
- Hay Creek Natural Area
- Lake Redstone County Park
- 400 State Trail
- Elroy-Sparta State Trail
- Dutch Hollow Lake
- Wiedman Memorial Park

Though the focus of this study is warm weather activities and these sites draw the bulk of their use in the summer months, most also offer winter activities, such as cross country skiing and snowshoeing. The 400 State Trail also permits snowmobiling and is part of a network of connected snowmobile trails in Sauk and Juneau Counties.

SUMMARY OF STAKEHOLDER INPUT

Kickoff Meeting

The planning process started in June 2017 with a meeting in Wonewoc convened by the Friends of the Baraboo River. At this meeting, we discussed the assets, challenges, opportunities and vision ideas for the future of the Baraboo River Corridor.

Assets

- \$900,000 in implementation grants lined up for specific projects
- History of the river – logging, mills, damming and dam removal; each community has its own history and story to tell
- Lack of urban development is great – you experience nature while on the river
- Things are inexpensive here – it is an “affordable” place to visit
- The 400 State Trail attracts about 45,000 annual users and the Elroy-Sparta Trail about 125,000 annual users

Challenges

- Log jams. Currently eight jams between La Valle and Reedsburg. Natural bank erosion causes trees to fall in and accumulate other river debris, requiring portages around the blockages
- Need to get all the communities on board as supporters, e.g. Rock Springs, which has good access facilities
- Need to sustain an organization to keep people engaged
- Need to overcome negative feelings about floods and the risk of floods (do this by explaining that more use will lead to more maintenance/clearing of obstructions, which will reduce flood risk)

Opportunities

- Connect the 400 State Trail to Devil's Lake and Great Sauk Trail
- Host more events like the Lazy River Canoe Race
- Use the Strive On app to collect and report more info about river conditions (To get people to use the Strive On app we need to have the outfitters ask users to load it.)

- Use the app to ping people at key sites/places/landmarks along the length of the river
- Build a river community, a group of people and culture that knows, uses and advocates for the river
- Identify the bridges, numbered and named, from the river and the road. This will help promote, orient, and improve safety in search and rescue operations
- Market to Minneapolis, Chicago, and Dells area. For Southern Wisconsin and Illinois, emphasize that you don't need to go "up north" to find beauty and seclusion
- Offer assistance to self-guided tours for people who have their own gear. Need to show people where to put in and take out, and where to go for meals and lodging
- Build an annual event around clearing the river
- Focus on families as the target audience

Vision Ideas

- We connect from the beginning of the river to the end, with everyone supporting one another
- More things to get people to stop, not just drive through, whether paddling, biking or other activities
- Continue to promote river as a destination – "longest restored free-flowing river in the nation." Want to see long-standing commitment to keep the river maintained and clear of debris
- Get communities involved in outdoor recreation in the area, and get users to visit local businesses and enjoy the communities. Want to let people know that there's more here

Brand Ideas

- History
- Geology (Driftless)
- Storytelling (people want to go home with a story)
- Recreation, especially river use and biking (or both – ride and glide/ peddle and paddle)
- Branding words:
 - Free flowing (be careful with this one, log jams are common and it sometimes isn't free flowing)
 - Peaceful, serenity
 - Abundant wildlife

Safety and Rescue Services Meeting

A meeting of public safety service people convened on September 28, 2017 to discuss safety issues related to recreational activity on the Baraboo River. Attendees, including representatives of the Sauk County Sherriff's Department and local fire departments, discussed their experience and challenges related to the safety of river users. The biggest safety challenge right now is the frequent tree falls and logjams that can force paddlers to portage around those blockages, especially in the upper reaches of the river. These conditions slow paddlers down, increasing the chance that they don't make it to their planned destination during daylight and leading to occasional search and rescue activities to ensure their safety.

Public safety staff noted that river use has been increasing, based on increased calls for assistance. They recommended several improvements to the river to improve safety and accommodate increased use, including shoreline maintenance in frequent problem areas, the addition of a motorized launch in Giese Park for emergency services access, and establishment of a numbering system for all bridges along the river to improve wayfinding for river users and public safety services.

Postscript: County staff confirmed in December that an initiative to number the bridges is currently in progress.

Public Meeting Feedback

A public meeting was hosted on Monday, December 18, 2017 at the Reedsburg Public Library. The meeting was attended by about 25 people, including members of the Friends of the Baraboo River, representatives of communities in the Corridor, outfitters, Sauk County Parks staff, members of the Juneau County Board interested in promoting the Corridor, and others.

A presentation of the findings and recommendations led to discussion of the same. This report incorporates feedback shared at that meeting, including additional data and logo refinement suggestions.

FINDINGS

OUTDOOR RECREATION AND ECONOMIC IMPACT

There are two big-picture economic questions that should be asked and answered to promote investments in outdoor recreation tourism in the Baraboo River Corridor:

- 1) Is there demand for more outdoor recreation in this region?
- 2) If outdoor recreation increases in this Corridor, what effect may that have on our local economy?

Outdoor Recreation Market

As documented by the Outdoor Industry Association (OIA) in *The Outdoor Recreation Economy* (2017), the outdoor recreation economy is immense. U.S. consumers spend an estimated \$887 billion on outdoor recreation, putting this activity on par with the financial services and insurance industry in scale.

OIA estimates that the Wisconsin outdoor recreation economy generates \$17.9 billion in consumer spending each year, including \$5.1 billion in wages and salaries and \$1.1 billion in state and local tax revenue.

IN WISCONSIN OUTDOOR RECREATION GENERATES:

\$17.9 BILLION
IN CONSUMER SPENDING ANNUALLY



168,000
DIRECT JOBS



\$5.1 BILLION
IN WAGES AND SALARIES

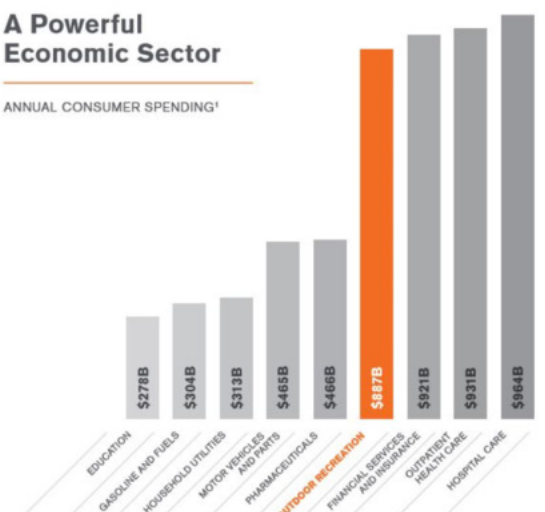


\$1.1 BILLION
IN STATE AND LOCAL TAX REVENUE



A Powerful Economic Sector

ANNUAL CONSUMER SPENDING¹



¹ Bureau of Economic Analysis, Personal Consumption Expenditures by Type of Product

More importantly, outdoor recreation is growing. The best and most relevant measure of this growth is a data point right here in the Baraboo River Corridor: Devil's Lake State Park visitor counts. Park staff does its best to track users through entry permits and vehicle counts. In 2017, Staff estimated a total of three million visitors. This may be an incomplete count based on anecdotal knowledge of people choosing to park outside of the Park and walk in on the busiest days. Ten years ago, a typical annual visitor estimate was around 1.5 million people; by these estimates, park use has doubled in the past decade. This surge in interest in the Park is spilling out into other nearby natural areas that have also seen increased activity in recent years, including many more visitors to Pewits Nest State Natural Area and Parfrey's Glen State Natural Area.

This increase in activity is both evidence of growing demand for outdoor recreation activities and also a clear opportunity to attract users from those nearby sites to other destinations and activities in the Corridor.



Parfrey's Glen State Natural Area, image source: Skillet Creek Media



Devil's Lake State Park, image source: dnr.wi.gov

FINDINGS

Economic Impact

There are a number of studies offering estimates of tourism spending. The Wisconsin Department of Tourism commissioned a study by Longwoods International that looked at all types of tourism. That study estimated an average of \$58 in spending by day visitors, and an average of \$180 in spending, per person, per night, for overnight visitors.

There are also studies that have looked at outdoor recreation and river recreation specifically.

A 2015 report by the River Management Society, titled *An Economic Argument for Water Trails*, compiled the results of three site-specific studies – one in the northeast United States, one in southeast Michigan, and one in Pennsylvania. Those studies estimated that each paddler on a water trail generates a per-paddler economic impact (direct, indirect and induced) of \$133 (Northeast US), \$207 (Pennsylvania), and \$485 (Michigan).

A 2002 report, *Case Studies of Water Trail Impacts on Rural Communities*, also reviewed three studies, each in more rural areas of the country. Those studies showed paddlers spend between \$27 and \$63 per day in local communities. Of greatest interest and relevance to the present effort is the study of paddler and angler activity on the Kickapoo River in Vernon County. Published in 2000 by Alan Anderson, that study documented about 16,000 river users in 1999 and spending of roughly \$1,231,000 by non-local “canoeists”. Further, that study estimated per-trip spending was about \$41 for locals and \$88 for visitors. That \$88 in 1999 is equivalent to about \$130 in 2018.

Based on these studies, it is reasonable to assume an economic impact of about \$150 per recreation visitor, or \$150,000 in impact for every thousand visitors.

An Economic Argument for Water Trails



August 2015

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Natalie Warren

Special thanks to:
Risa Shimoda, Corita Waters, Lelia Mellen, and Erik Wrede

River Management Society

MARKET DATA

Retail Trade

One of the central ideas of this study is that increased recreation activity in the Corridor will result in increased spending, especially by tourists. If successfully expanded, recreation tourism should have a positive impact on retail spending in local communities, including sporting goods, restaurants and drinking places. It could also support gasoline stations, though likely to a negligible degree. These retail categories are tracked by the US Census Bureau. (Other spending types likely to increase include lodging and outfitter activity; however, these are services, not retail trade, and not tracked in the same way.)

ESRI Business Analyst compiles data from the 2007 and 2012 Census of Retail Trade (from the US Census Bureau) and the 2016 Consumer Expenditure Surveys from the Bureau of Labor Statistics. These data sources are geographically searchable, enabling the selection of user-defined geographies. For the purposes of this study, we selected the Baraboo River Watershed as the study area (see Figure 1 below). This study area includes all

the communities along the river (e.g. Baraboo, Reedsburg, Elroy) but excludes nearby cities not within the watershed such as Lake Delton, Wisconsin Dells, and Mauston.

ESRI Business Analyst compares retail trade data (a measure of supply) against consumer spending data (a measure of demand) and highlights supply surpluses and deficits within the selected geography. Gaps between supply and demand do not necessarily reflect a dysfunction of the market, but they may indicate either opportunity or lack of opportunity to expand local sales in a particular retail sector.

It is important to note that this consumer demand estimate is based on the incomes and spending patterns of local residents. Per this data, there are about 19,000 households, 47,600 residents, and per capita income of \$24,500. Considering all retail trade, there is more demand than supply within the study area – about 7% of retail trade demand, or \$76 million, is leaking out to other markets each year as people drive elsewhere to do their shopping. See the full results in the Appendix.

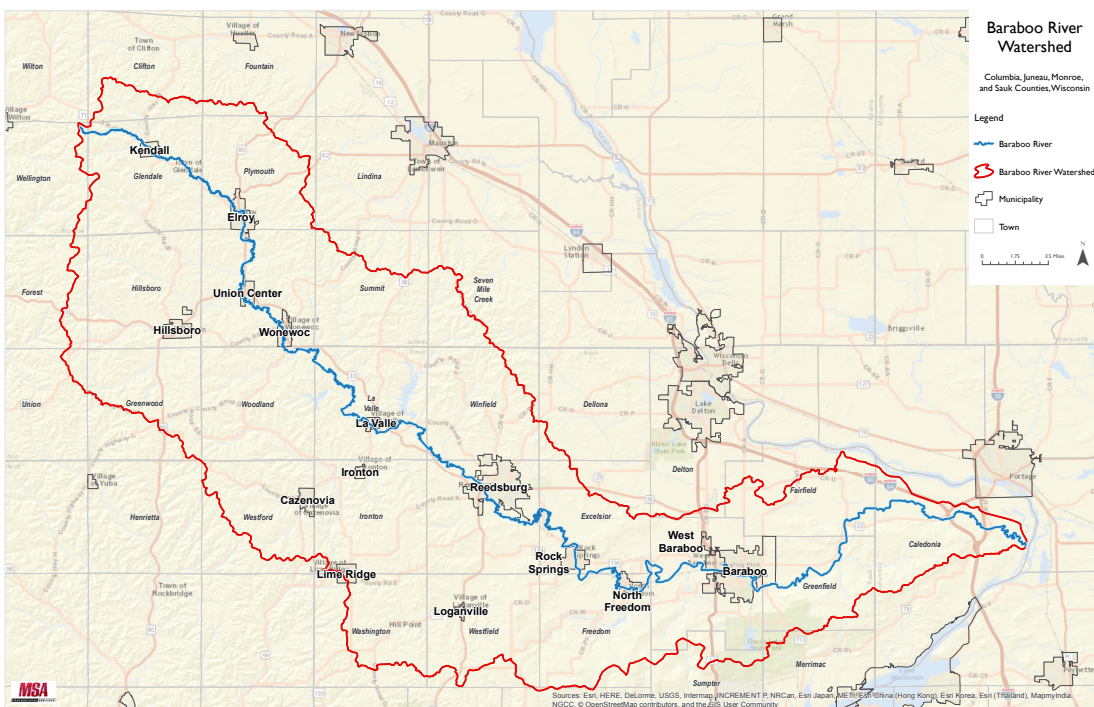


Figure 1. Baraboo River Watershed
Source: MSA Mapping

FINDINGS

Within the \$514 million of total annual retail sales supply, the portion ascribed to “Sporting Goods/Hobby/Musical Instrument Stores” is \$12.04 million, and the estimate of demand is lower than this, at \$11.26 million, meaning there is about \$780,000 of surplus supply. This makes sense because the study area includes Devil’s Lake State Park, which is known for outdoor recreation and attracts visitors who spend money on sporting goods.

This ESRI Business Analyst data indicates a total of 18 Sporting Goods/Hobby/Musical Instrument stores in the study area. There are two significant caveats to the quality of this data. First, the data includes at least one relatively large retailer, Gander Mountain, that existed in 2012 but is no longer in operation. Second, the Sporting Goods data does not include the role of several large retailers in the City of Baraboo, including Walmart, Menard’s, and Farm & Fleet. These three retailers likely represent the bulk of sporting goods sales in the study area, by dollar amount, but there is no reliable way to break out those sales for purposes of this study. The bottom line here is that general sporting goods spending is difficult to track within this geography and not likely a valuable measure of outdoor recreation tourism activity.

Regarding drinking and eating places, the study area has excess drinking places per these supply and demand data (about \$2.2 million more than local residents should need themselves) and a deficit of restaurants (about \$8.1 million less than what local residents should need). The important takeaway from this finding is the apparent market capacity for more restaurants. This is both an opportunity to retain more local and visitor dollars within the study area, and also an opportunity to enhance the visitor experience by offering more dining options.

Lodging Data

There is no readily available database of lodging options in the Corridor. Baraboo and Reedsburg collect room tax revenue, but they do not maintain any data about the number of rooms from which that revenue is generated.

To get a better understanding of where people can currently choose to stay overnight in the area, we conducted a Google search for hotels, motels, bed and breakfasts, and AirBnB offerings within the study area. We also called the hotels and motels to inquire about the number of rooms. Most answered our questions, and we made an estimate for the couple that could not be reached or would not tell us how many rooms they have.

As revealed in the Lodging Units table below, most (94%) of the estimated 650 available rooms are in hotels and motels, and about two-thirds of all rooms are in Baraboo (37%) or Reedsburg (33%). The other third are distributed among West Baraboo (13%), Hillsboro (7%), Elroy (5%), Wonewoc (2%), Kendall (2%) and La Valle (1%).

Figure 2. Lodging Units in Baraboo River Corridor by Municipality and Type
Source: MSA

Municipality	Air B&B	Bed & Breakfast	Hotel	Motel	Total
Baraboo	5	12	82	147	246
Elroy	0	4	0	30	34
Hillsbro	0	0	44	0	44
Kendall	0	0	0	10	10
La Valle	0	9	0	0	9
Reedsburg	0	8	165	46	219
West Baraboo	0	0	83	0	83
Wonewoc	0	0	0	13	13
Total	5	33	374	246	658

Union Center, Rock Springs, North Freedom and many of the Towns within the Corridor with River access do not currently have any lodging options, reflecting their small size and lack of retail and service offerings. It should be noted that there are thousands of hotel rooms in the City of Wisconsin Dells and the Village of Lake Delton, accessible by a 20-40 minute drive from any part of the Corridor. This is both an advantage and a disadvantage for the Corridor communities, as it ensures the availability of lodging nearby, but also pulls visitors out of the Corridor at the end of their day.

Lodging is a key component of tourism spending growth within the Corridor; anecdotal evidence suggests that many current river users are locals or day-trippers. The Corridor is still in the process of becoming known as a recreation destination, and it has the potential to attract more overnight visitors. Visitors engaging in river recreation who stay overnight spend around \$100/day (<https://wmeac.org/wp-content/uploads/2014/10/WaterTrailsFinal.pdf>). If visitors stay longer, there is also an increased likelihood they will take in other recreation and tourism sites, such as Devil's Lake State Park or Circus World Museum, resulting in additional spending. Nationwide, Oxford Economics estimates that for each \$100 spent on lodging, hotel guests spend an additional \$221 at other businesses (https://www.ahla.com/sites/default/files/Economic%20Impact%20Study%20%28Oxford%29_0.pdf).

It must be acknowledged that documenting the number of rooms available is an interesting but weak measure of tourism activity for a specific use. Surveying the lodging choices of river and trail users is an opportunity for future study.

RIVER & TRAIL USE DOCUMENTATION

During the course of this study, we collected samples for a month of river use by placing small “trail” cameras with river views. One camera was located on the Hatchery Road bridge, next to Giese Park in the Town of Baraboo (between West Baraboo and North Freedom), and the other on a building just west of the WIS 113 bridge in the City of Baraboo, near the Glenview Landing access.

Both cameras were pointed upstream, and collected still images at one-minute intervals. The resulting photo collection was manually scanned for river users, and each user was documented by gender, approximate age, and use of personal or outfitter boats and gear. We also documented group size, time of day, day of week, and weather conditions.

The data was collected from Monday, July 31, 2017 until Friday, September 1, 2017 at Giese Park and from Monday, July 31, 2017 until Saturday, September 2, 2017 at Glenview launch, a period that included four full weekends. The weather during this period was generally warm (daily highs between 68 and 84 degrees) and dry (precipitation on just 7 days, totaling 1.75 inches). River flow conditions were normal – the flow data from a USGS meter in Baraboo showed a range of 396 to 940 cubic feet per second (cfs). The river had been at flood stage during the last two weeks of July, peaking on July 24 at roughly 3,700 cfs, but flows were below 600 cfs after August 2.

Here are the primary findings from the photographic record of river users:

- A total of 239 people were observed at Glenview, and 402 at Giese.
- About 92% of river users were adults. Of these, about 56% were men.
- About 75% of all users were estimated to be between the ages of 18 and 49. For comparison, about 40% of the Wisconsin population is within this age range. Of the remaining 25% of users, most were older than 49.
- Saturday was the most popular day to be on the river, by far – about 30% of all users were observed on that day in both locations, an additional approximate 15-20% were on Sunday. The remaining 50% of paddlers were distributed throughout the remainder of the week.
- Roughly 70% of paddlers were using outfitter equipment.
- Most river users were in individual boats, such as single-seat kayaks. This included about two-thirds of paddlers at Giese and 88% at Glenview.
- Most paddlers traveled in groups of two-four people. Just over 25% of paddlers observed at both sites were in groups of five or more people. Less than 3% were observed paddling alone.

FINDINGS

Giese Park



Glenville Landing

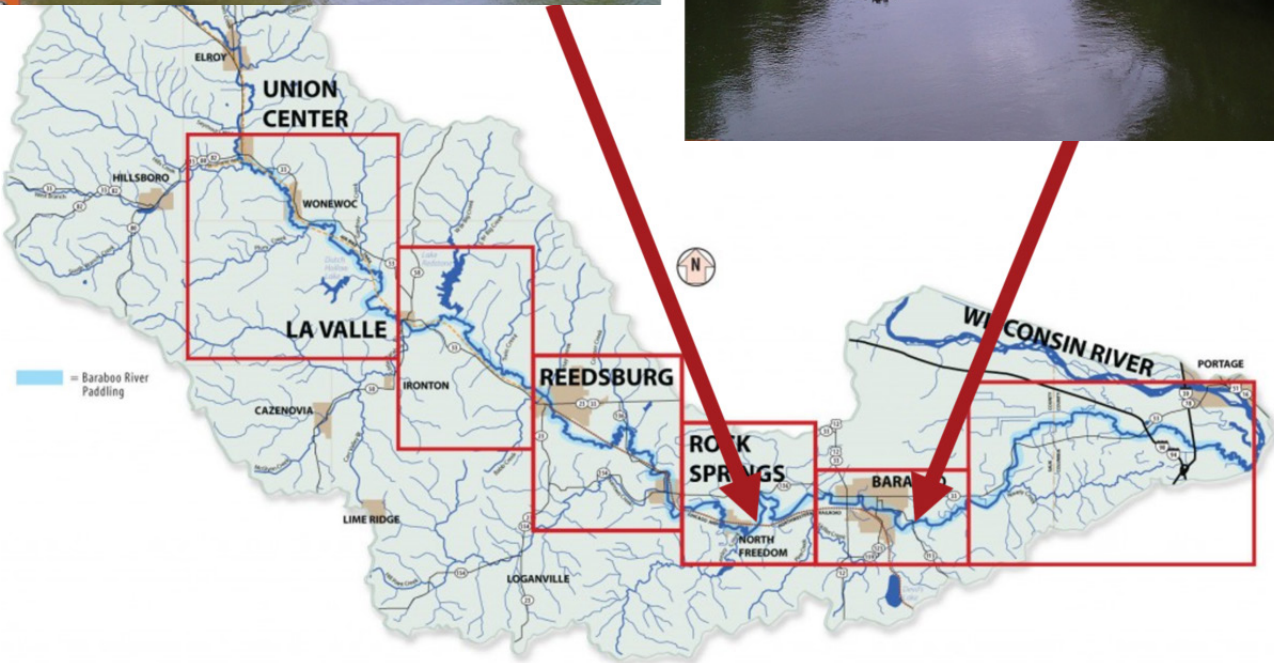
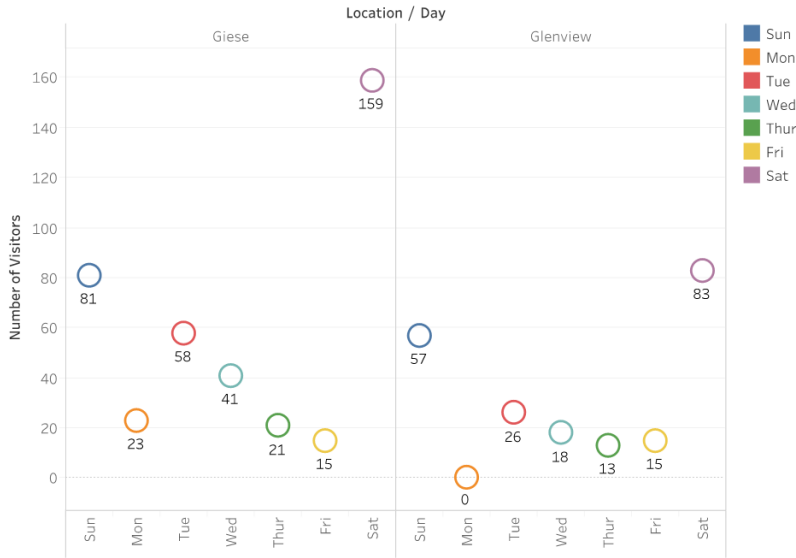


Figure 3. Number of Visitors Day and Location
Source: Strive On/Bill Bowen



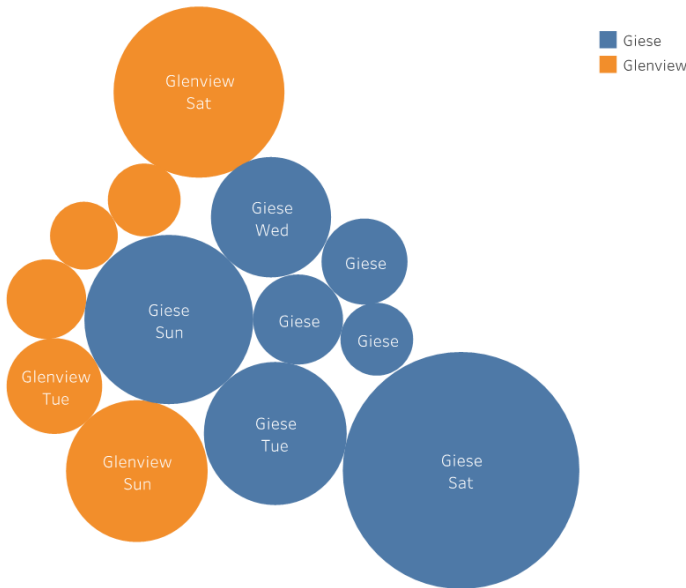
The figures on this page illustrate some of the river use findings listed on page 13.

During the study, we requested to sample walking and biking activity on the 400 State Trail by similar methods, but the Wisconsin DNR was unable to allow photo data collection.

In lieu of current use data, we can reference a DNR study completed about ten years ago that is still cited by local stakeholders. That study, which counted both summer and winter use (the Trail allows snowmobile use), estimated about 45,000 annual users on the 400 State Trail. Updated Trail use counts are an opportunity for future study.

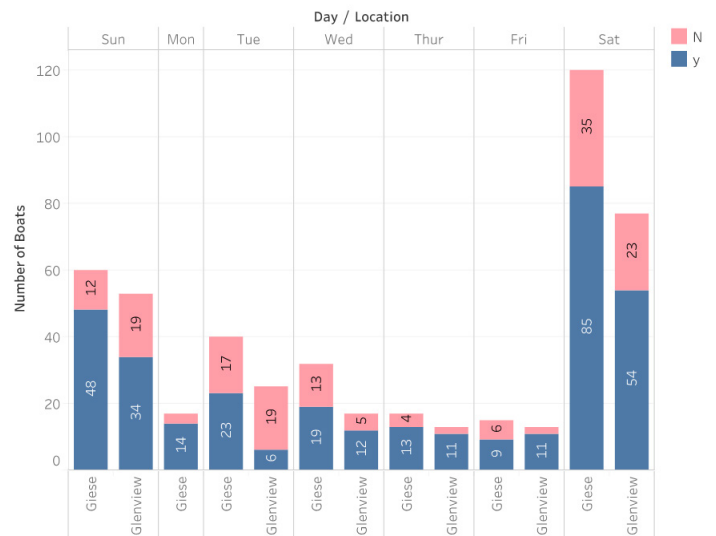
Sum of Count for each Day broken down by Location. Color shows details about Day.

Figure 4. Number of Visitors Day and Location
Source: Strive On/Bill Bowen



Location and Day. Color shows details about Location. Size shows sum of Count. The marks are labeled by Location and Day.

Figure 5. Number of Boats by Day/Location
Source: Strive On/Bill Bowen



Sum of # Boats for each Location broken down by Day. Color shows details about Outfitter. The view is filtered on Outfitter, which excludes Null.

FINDINGS

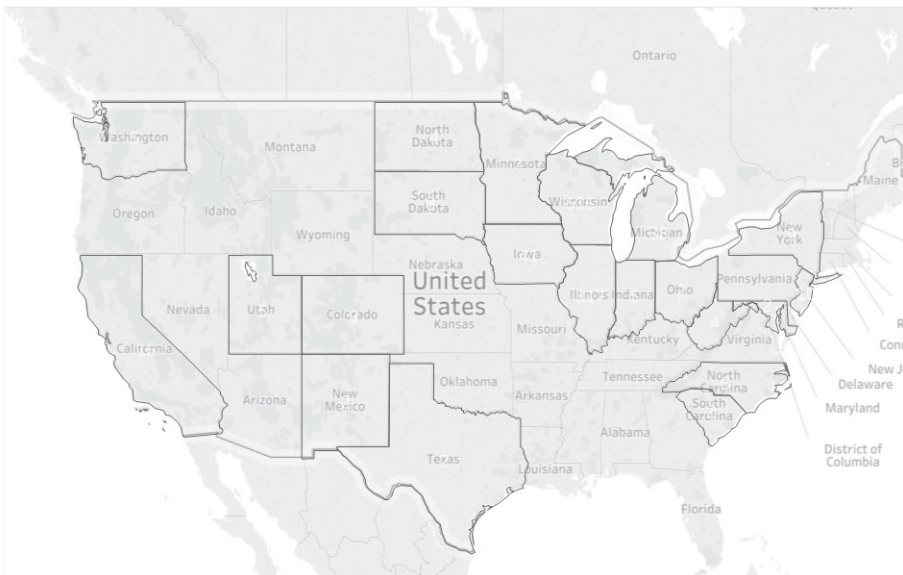
Another source of data about river use comes from two of the outfitters active in the Corridor.

Baraboo River Canoe and Kayak Rentals LLC operate in the Village of North Freedom and launch trips from North Freedom Park and Giese Park. In the month of August 2017 this outfitter rented equipment to 1,109 paddlers. These paddlers were mostly from Wisconsin (55%) and Illinois (27%), but the remaining 18% were from 23 different states and one foreign country (see Figure 6). Based on this data, only 131 of those 1,109 paddlers (12%) were from Sauk County – the other 88% represent imported dollars.

Beyond Boundaries operates in the Village of Wonewoc and launches trips from their site. They provided data describing 69 paddlers in 21 groups. Most of these paddlers were from Wisconsin, plus a handful from Illinois, Michigan and Iowa.

Figure 6. Outfitter Data: Zip Code of Visitors - August 2017

Source:



STRIVE ON MOBILE INTERPRETIVE INTERFACE

About the App

This study incorporated the piloting of a mobile phone application known as Strive On for use in the Corridor. Strive On, developed by a team at University of Wisconsin-Whitewater led by Professor Choton Basu, is intended to engage people in (typically) outdoor settings by providing “hyper local” information about places of interest.

Today’s smart phone devices include geographic positioning system (GPS) sensors that can identify the exact location of the phone on earth within several meters. The Strive On app uses a technique known as “geofencing” to draw a boundary around sites of interest. When a Strive On-enabled device crosses into

one of these geofenced sites, the app brings up relevant content about that site as loaded into the system, such as historical information or hours of operation. The app also offers social media functionality, allowing people to “check-in” as a visitor, offer a review of the site, and quickly share info about the site through other social media platforms.

Development Activities

This study tested and enhanced the utility of the Strive On app for use on the Baraboo River. The consultant team demonstrated the use of brief audio messages to deliver interpretive content along the River, to highlight natural or historical features of interest. Those audio recordings are offered for listening whenever the associated phone passes into a geofenced area. This approach enables easier use of the app while on the River; instead of looking at the phone, the paddler can look around at the features described in the recording.



Location-Aware Interactive Engagements

FINDINGS

The other effort in this study related to Strive On was the development and loading of content at sites throughout the Corridor. Several interested stakeholders offered content for specific sites, including photos, lists of site history and amenities, etc. These samples are a starting point for further development of data for many more sites throughout the Corridor and along the River, for example bike paths, historic sites, etc.

Future Use Opportunities

The Strive On app could be used in a variety of ways to enhance not only the user experience, but also the economic development benefit of tourism in the Corridor. The app can be used to provide information about natural and historic sites, and also business destinations likely to be of interest to visitors such as lodging, restaurants, outfitters, and sporting goods stores. The app can be set up to suggest nearby customer destinations and those destinations can become financial sponsors of the app itself.

Another use opportunity is “gamification” of outdoor sites. Similar to Pokemon Go, the idea is that a visitor can be offered a challenge to visit a certain number of sites in the area. As those sites are visited, the person’s score goes up. This could be used as a contest among friends, or it could result in a discount for a purchase at a sponsor business.

A third opportunity is to gain a stronger understanding of what people think of the Corridor. Visiting a specific site or series of sites can trigger an online survey, either immediately or later in the day. Short surveys could be used to learn more about what people like and don’t like about the corridor.



ACCESSIBILITY IN OUTDOOR RECREATION

An emerging trend in outdoor recreation is accessibility for users with mobility limitations. Nearly 30 years after passage of the Americans with Disabilities Act (ADA), and as the Baby Boomer generation continues to age, societal expectations about outdoor recreation are shifting. Whereas biking, canoeing and kayaking were once considered activities for the young and agile, equipment and access improvements are opening these activities to a much larger group of people.

A variety of stable, easy-to-access kayaks are available on the market and the Baraboo River now has two accessible floating launch piers with handrails and ramps for safe entry and exit. Biking has also become more accessible with the development of recumbent tricycles. All of these innovations allow people who might otherwise stay away from these activities to join in. This is an important opportunity to expand the audience of potential users.

There are currently two sites with accessible kayak launch piers, one at North Freedom Park in North Freedom, and one at Haskins Park in West Baraboo. The 10.5-mile stretch of river between these sites should be highlighted as accessible. As additional improvements are made up and downstream of this segment, promotion of this feature should also expand.

A relevant anecdote about the market potential of catering to those with impaired mobility is the experience of the Erie Canal Boat Co. in Fairport, New York. This outfitter began catering to the impaired mobility audience and saw, as a result, a 30% jump in revenue in 2017. As illustrated at right, they offer lifts to help get people into boats, hand-powered tricycles, and staff trained to use the equipment.



image source: fareharbor.com/eriecanalboatcompany



image source: fareharbor.com/eriecanalboatcompany

RECOMMENDATIONS

BRAND IDENTITY

A brand identity is how an entity is perceived by customers. The brand identity typically includes a name and logo, and often a tagline to communicate the essence of the brand. Effective branding improves awareness and positive perceptions of the branded place or business.

In this process, we conducted a review of some of the existing brand identities in the area related to the river, communities along the river, and outdoor recreation entities. Here is what we found.

It should be noted that there is quite a bit of interest in place branding in Sauk County right now, tied to the ongoing placemaking initiative. Communities in the region recognize that

their long-term success is tied to their ability to attract people, both as visitors and as residents, and brand identity enhancements are part of the county-wide effort at placemaking. That interest in branding is terrific, and it also represents a challenge, as we expect multiple entities may be rolling out branding efforts tied to the Baraboo River or biking or boating. The challenge is to find a relevant voice within that mix for the Baraboo River Corridor.

Our starting point in proposing branding ideas for the Corridor is that the brand needs to communicate something about A) the geography to which it refers, and B) the activities available in that area. Further, in light of the mix of branding efforts in play, and our assumption that there will be limited resources available to promote the brand, it should be simple, direct and explicit.

Brand Part One – Name and Tagline

Figure 7. Existing Brand Identities in the Corridor



We considered an assortment of possible words and phrases that could be used either as a name or as a tagline to add meaning to the name:

- BRC
- “Free Flow”
- Drift Free
- Free Flowing
- “B Free”
- Baraboo Restored
- Baraboo Free
- Get my Drift?
- Driftless Drifting
- U2BOO
- Baraboo’s String of Pearls
- Pearls of the Boo
- Baraboo Pearls
- Baraboo Free Flow
- Go Boo
- Drift On
- Run Free
- Glacier Free
- Baraboo Tonic
- Devils Tonic
- Devils Flow
- Baraboo Flow
- Devils Drift
- Baraboo Drift
- Baraboo Spirit
- Experience the Boo!

Discussion about these monikers brought us back to the desire to be simple and direct. We are recommending “Baraboo River Recreation Corridor” for the name, and we are recommending the use of no additional tagline. That name, if combined with an effective logo, should be sufficient to communicate location and activities. And it is not dependent on a successful marketing campaign to establish a unique brand name – googling that name today takes you to several relevant websites, starting with the Friends of the Baraboo River.

Brand Part Two – Logo

We experimented with several logo concepts, generated two preliminary ideas, then a final recommended logo following feedback at the public meeting. The recommended logo uses the circle form with the river through the middle, portrays the variety of recreation activities available here, and uses a unique color combination.

Figure 8. Preliminary Logo Concepts for Baraboo River Recreation Corridor
Source: MSA



Figure 9. Recommended Logo for Baraboo River Recreation Corridor
Source: MSA



RECOMMENDATIONS

TARGET MARKET/ MARKETING AUDIENCE

The target market for promoting and growing the Baraboo River Recreation Corridor is the millions of people already coming to the area for outdoor recreation. Devil's Lake State Park saw an estimated three million visits in 2017, and this activity has begun to spill out to other sites. Pewits Nest State Natural Area (in the Baraboo River basin) and Parfrey's Glen State Natural Area (east of Devil's Lake) have seen dramatic growth in visitation, likely spurred by a combination of the heavier use and congestion at Devil's Lake and social media posts and digital image sharing that highlight the beauty of these places. These hundreds of thousands of visitors exploring Devil's Lake State Park and the other Natural Areas are a prime target for further explorations into the Baraboo River Corridor.

The prime demographic market segment to target is families. The recreation opportunities available in this Corridor are generally safe and accessible to a wide range of ages, due to the lack of rapids on the river and the lack of hills on the trail (though it is surrounded by driftless topography). These conditions allow for a range of abilities and fitness levels among visiting parties. Also, this area is relatively inexpensive for visitors, in terms of the costs of goods and services, so it represents an opportunity for budget travel, especially with larger families.

Geographically, the target market extends to the millions of people within a four-hour drive of the Corridor, including the Minneapolis/St. Paul, Milwaukee and Chicago markets (see further discussion about the "Circle City" dynamic in the next section).

MESSAGING PRIORITIES

1) Promote your best sites and trail segments (while working to close the gaps)

The vision for this Corridor features recreation on contiguous trail networks, including bike and water trails from Elroy to Baraboo.

At present the main walking/biking trail is the 400 State Trail, which runs from Elroy to Reedsburg but does not continue to Baraboo. The long-term vision is a connection through Devil's Lake State Park to the Great Sauk Trail, and connection beyond that to Madison. For right now, the land trail focus should be on two distinct pieces of completed trail in the watershed – the 22 miles of 400 State Trail and the 3 miles of riverwalk in the City of Baraboo. The Baraboo Riverwalk is officially part of the Ice Age National Scenic Trail, and it is one many completed off-road trail segments of this 1,100-mile trail traversing Wisconsin. In future years it will be important to highlight the opportunity for further tourism growth through additional trail connections. It will someday be possible to bike from Milwaukee to La Crosse on State trails, through Madison, Devil's Lake and the Baraboo River Corridor. That connectivity will be a powerful driver of tourism interest and exploration in this Corridor.

As for the river trail, it is contiguous but not easily travelled. Though the removal of human dams has restored it as free flowing, there are stretches of the river that are routinely impassible without significant effort due to fallen trees. The soft banks allow trees to collapse during and after heavy rains, resulting in logjams that require frequent cleaning efforts. Promotional efforts should be focused on those stretches and corresponding launch sites which are getting routine maintenance. A commitment to expanded maintenance activities is strongly encouraged. An annual public event is suggested as a means to organize cleanups each spring, and to recruit people for continuing maintenance throughout the paddling season. We also advise collaboration with local fire and rescue departments, who are tasked with tracking down missing paddlers. Sometimes they are missing because of difficulty

getting past multiple logjams, and those same jams impede efforts to find and rescue delayed paddlers who don't get off the river before dark. The fire and rescue departments are allies in efforts to maintain the safety of the river by removing logjams, and also to get funding and or regulatory approval to make changes to the riverbanks in locations that have frequent logjam problems.

2) Highlight and expand accessibility features

This is an important opportunity to expand the audience of potential users by catering to people with mobility constraints. The Baraboo River Recreation Corridor is picturesque, but its trails are not especially challenging for paddling or biking due to the relative lack of rapids or hills. Outfitters should consider catering to clients with mobility limitations with the objective of increasing the size of visitor groups, and marketing initiatives should highlight accessibility and fun for the entire family.

In addition to seeking National Water Trail designation for the Baraboo River (identified in the Baraboo River Corridor Plan), there is also an excellent opportunity to establish the first fully accessible river in the nation by adding accessible launch piers at key put ins and take outs through the entire length of the river. When achieved, this outcome could result in national media attention.

3) Highlight the Driftless Area

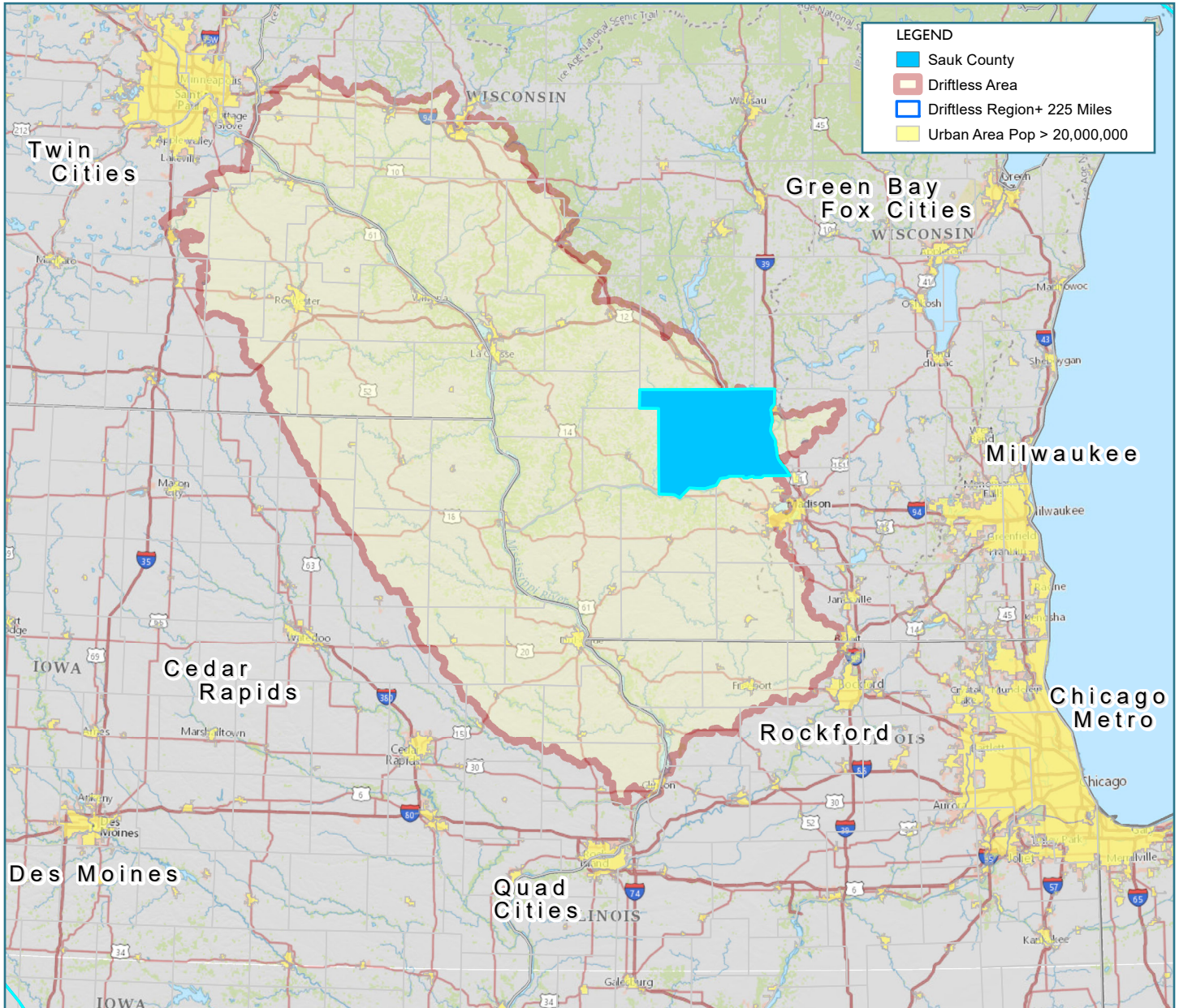
The Baraboo River Corridor is part of the geological region spanning major portions of four states known as the Driftless Area (see Figure 10 on the following page). That "driftless" term describing unglaciated lands has been seeing increased use in recent years, especially in the private sector (e.g. Driftless Glen Distillery) and there are efforts underway to further develop and market the entire Driftless Area as a destination of global significance.

The Driftless Area is at the center of a ring of major population centers, including Minneapolis/St. Paul, Milwaukee, Chicago

and Des Moines. Renowned University of Wisconsin Professor of Landscape Architecture Phil Lewis described this as a regional "Circle City", one of 23 around the country, and encouraged the conservation of the Driftless Area as a permanent resource for tourism, food production and natural resource protection. There are more than 20 million people living within a four-hour drive of the Driftless Area, which is a viable weekend getaway distance. Promotional efforts by public and private entities should highlight the Driftless Area features and scenery, and also the convenient accessibility of the Corridor from those metro areas.

RECOMMENDATIONS

Figure 10. Map of Driftless Area and Sauk County
Source: MSA Mapping



MARKETING METHODS

1) Social Media

Social media is a powerful and low-cost means of promoting a place. The challenge is harnessing it successfully. When it works well, it is the visitor doing the promoting with their own posts, only occasionally augmented by “official” content from local businesses and communities. To establish the Baraboo River Recreation Corridor in more minds as a desirable destination for outdoor recreation, local advocates should facilitate posts that identify destinations within the Baraboo River Recreation Corridor. The following methods are recommended:

- a) Identify and improve photo opportunity sites in each community. Find places that are picturesque and convenient to visitors, and add a sign in each of those locations that identifies the community and/or the Baraboo River, installed to enable people to pose with the sign and the scenery. The best places are beginning and end points for adventures in the Corridor, including river access sites and trailheads for the 400 State Trail.
- b) Outfitters should actively help people take group pictures at the beginning or end of their adventures with something identifying the Corridor in the picture, such as a sign (as described above) or a prop provided by the outfitter. Use visitors’ own phones, and then encourage them to make a social media post.
- c) Create a Snapchat geofilter for use by Snapchat users that may post images while in the Corridor.
- d) Sponsor an annual contest to recognize photos and videos that celebrate the natural beauty and recreation activities in the Corridor. Share the entries and winners on Facebook and other social media platforms. Promote noteworthy videos.
- e) Outfitters and other businesses that cater to recreational users should have a social media presence and use it to broadcast events, key dates, news about the Corridor, etc.

2) Strive On

As previously described in this report, Strive On is a multifaceted smartphone app that can share interpretive information using GPS triggers and also collect information from users. We recommend that the Friends of the Baraboo River or other local entity commit to further development and promotion of this app. The following specific implementation tasks are encouraged:

- a) Work with each river and bike trail outfitter to promote app use by visitors. Provide flyers, both digital and hard copy, that tell people what it is and how to start using it
- b) Collect sponsorships. One source is restaurants, hotels, campgrounds, sporting goods stores and other venues that benefit from recreational visitors. Ask these sponsors for either a financial contribution or a discount for app users (or both). Feature those sponsors in the app and offer discount coupons via the app to encourage both app use and sponsor patronization. Another source of sponsors is entities such as SSM Health that are promoting physical activity and healthy living.
- c) Build content. App use will grow only if it has enough content to be useful to people. Be sure that there is content for sites along each of the most-used trail segments, especially in locations that are both noteworthy in some way and also common rest stops along the trail. Create contests with the app that encourage people to visit a certain number of sites within the Corridor
- d) Encourage reviews within the app and posts to other social media platforms from the app. Incentivize this by requiring such activity to activate coupons for sponsoring businesses.
- e) Collect feedback about the corridor using surveys. When people use the app and visit a certain location in the corridor, this can be set up to trigger a short survey later that day, to learn more about what they did and/or how they liked their experience there.

3) Signage

One current shortcoming in the Corridor is a lack of good and/or consistent signage to help people learn about and find the trails. This is especially true for the river, which in many parts of the Corridor is not visible from WIS 33. While good for the experience once on the river, the isolation of the river reduces awareness of it.

Four types of signs are recommended:

The first is uniform wayfinding signs to river access points from the nearest point on a State highway.

The second type is river identification signs. The State highways cross the Baraboo River in many places, and each crossing is an opportunity to identify the River. There are few such signs right now.

The third sign type needed is wayfinding signs for paddlers that identify bridges and other notable features in a uniform way throughout the length of the river. This would serve as a wayfinding improvement for paddlers, for convenience, peace of mind, and safety. As noted in the Stakeholder Input section, Sauk County Emergency Management is currently working on a system of bridge numbering and marking to help emergency services and river users in need of assistance find each other.

A fourth sign type is intended not as wayfinding, but to build awareness of the Corridor. We recommend signs on USH 12 at the north and south edges of the Baraboo River watershed that say "Entering the Baraboo River Recreation Corridor." This will require discussion with the Wisconsin DOT to win approval for such signs. An alternative option, if WisDOT is not cooperative, is billboards on private property with the same message.

4) Devil's Lake State Park Cross-Promotion

The three million plus visitors to Devil's Lake State Park are a marketing gold mine for the rest of the Baraboo River Recreation Corridor - they are nearby and have already demonstrated an interest in some form of outdoor recreation. The following methods are recommended:

Install billboards along each of the main access routes to the park promoting the paddling and peddling activities in the Baraboo River Recreation Corridor.

Purchase ads with Google and social media platforms that come up when people search for Devil's Lake State Park. Link people back to outfitters and/or great photos and videos of the Corridor.

Partner with local park advocates, such as the Friends of Devil's Lake State Park and the Devil's Lake State Park Visitor Guide to provide information and links to Baraboo River Corridor resources on their sites (the Visitor Guide already does this).

APPENDIX A

ESRI BUSINESS ANALYST ONLINE DATA



Retail MarketPlace Profile

Baraboo River Watershed
Area: 660.06 square miles

Prepared by Esri

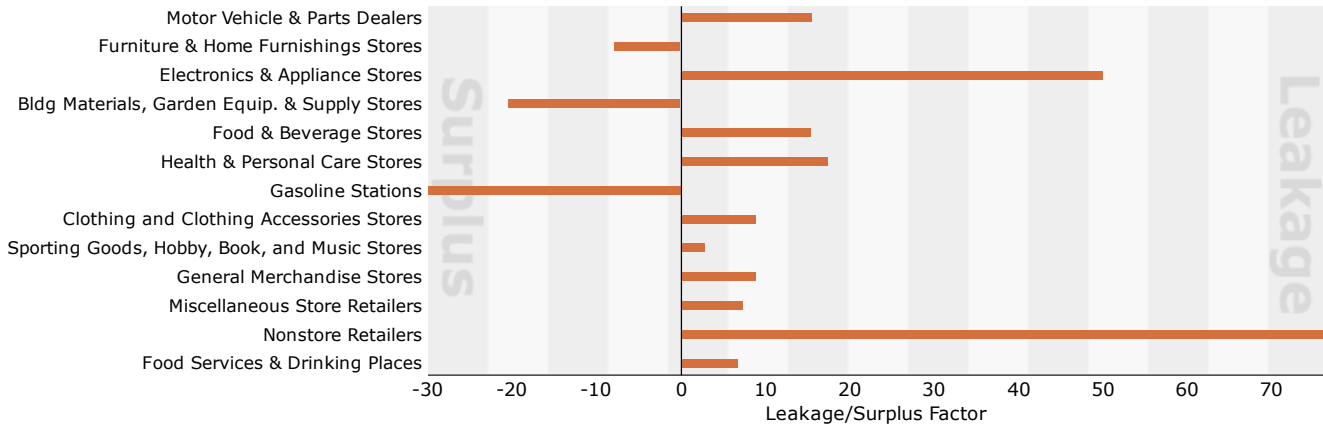
Summary Demographics						
2016 Population						47,606
2016 Households						19,071
2016 Median Disposable Income						\$37,517
2016 Per Capita Income						\$24,544
Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$647,176,279	\$564,193,932	\$82,982,347	6.9	401
Total Retail Trade	44-45	\$589,534,175	\$513,936,643	\$75,597,532	6.9	278
Total Food & Drink	722	\$57,642,104	\$50,257,288	\$7,384,816	6.8	123
Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$139,453,068	\$101,768,200	\$37,684,868	15.6	34
Automobile Dealers	4411	\$113,002,066	\$90,206,179	\$22,795,887	11.2	18
Other Motor Vehicle Dealers	4412	\$17,992,734	\$6,060,800	\$11,931,934	49.6	6
Auto Parts, Accessories & Tire Stores	4413	\$8,458,267	\$5,501,221	\$2,957,046	21.2	11
Furniture & Home Furnishings Stores	442	\$16,308,896	\$19,105,345	-\$2,796,449	-7.9	14
Furniture Stores	4421	\$9,930,396	\$13,826,634	-\$3,896,238	-16.4	7
Home Furnishings Stores	4422	\$6,378,500	\$5,278,710	\$1,099,790	9.4	7
Electronics & Appliance Stores	443	\$28,523,246	\$9,446,012	\$19,077,234	50.2	14
Bldg Materials, Garden Equip. & Supply Stores	444	\$37,824,471	\$57,337,370	-\$19,512,899	-20.5	38
Bldg Material & Supplies Dealers	4441	\$33,081,026	\$56,521,500	-\$23,440,474	-26.2	34
Lawn & Garden Equip & Supply Stores	4442	\$4,743,446	\$815,870	\$3,927,576	70.6	4
Food & Beverage Stores	445	\$96,245,656	\$70,592,175	\$25,653,481	15.4	29
Grocery Stores	4451	\$82,547,958	\$54,763,697	\$27,784,261	20.2	17
Specialty Food Stores	4452	\$9,197,744	\$9,486,231	-\$288,487	-1.5	9
Beer, Wine & Liquor Stores	4453	\$4,499,954	\$6,342,246	-\$1,842,292	-17.0	4
Health & Personal Care Stores	446,4461	\$35,458,143	\$24,872,778	\$10,585,365	17.5	20
Gasoline Stations	447,4471	\$44,609,780	\$82,842,145	-\$38,232,365	-30.0	19
Clothing & Clothing Accessories Stores	448	\$21,226,953	\$17,671,504	\$3,555,449	9.1	15
Clothing Stores	4481	\$14,022,075	\$15,397,139	-\$1,375,064	-4.7	9
Shoe Stores	4482	\$2,931,335	\$119,562	\$2,811,773	92.2	1
Jewelry, Luggage & Leather Goods Stores	4483	\$4,273,543	\$2,154,803	\$2,118,740	33.0	5
Sporting Goods, Hobby, Book & Music Stores	451	\$13,566,174	\$12,792,185	\$773,989	2.9	21
Sporting Goods/Hobby/Musical Instr Stores	4511	\$11,257,277	\$12,039,425	-\$782,148	-3.4	18
Book, Periodical & Music Stores	4512	\$2,308,898	\$752,760	\$1,556,138	50.8	3
General Merchandise Stores	452	\$111,088,786	\$92,658,620	\$18,430,166	9.0	10
Department Stores Excluding Leased Depts.	4521	\$87,600,942	\$87,945,777	-\$344,835	-0.2	5
Other General Merchandise Stores	4529	\$23,487,845	\$4,712,843	\$18,775,002	66.6	5
Miscellaneous Store Retailers	453	\$25,812,762	\$22,266,650	\$3,546,112	7.4	62
Florists	4531	\$1,088,498	\$1,641,671	-\$553,173	-20.3	8
Office Supplies, Stationery & Gift Stores	4532	\$4,806,044	\$3,008,554	\$1,797,490	23.0	13
Used Merchandise Stores	4533	\$4,476,969	\$8,583,680	-\$4,106,711	-31.4	18
Other Miscellaneous Store Retailers	4539	\$15,441,251	\$9,032,745	\$6,408,506	26.2	23
Nonstore Retailers	454	\$19,416,239	\$2,583,660	\$16,832,579	76.5	2
Electronic Shopping & Mail-Order Houses	4541	\$14,309,176	\$0	\$14,309,176	100.0	0
Vending Machine Operators	4542	\$1,460,920	\$0	\$1,460,920	100.0	0
Direct Selling Establishments	4543	\$3,646,144	\$2,583,660	\$1,062,484	17.1	2
Food Services & Drinking Places	722	\$57,642,104	\$50,257,288	\$7,384,816	6.8	123
Special Food Services	7223	\$1,506,564	\$30,037	\$1,476,527	96.1	1
Drinking Places - Alcoholic Beverages	7224	\$3,871,909	\$6,082,032	-\$2,210,123	-22.2	38
Restaurants/Other Eating Places	7225	\$52,263,630	\$44,145,219	\$8,118,411	8	84

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement. http://www.esri.com/data/esri_data/methodology-statements

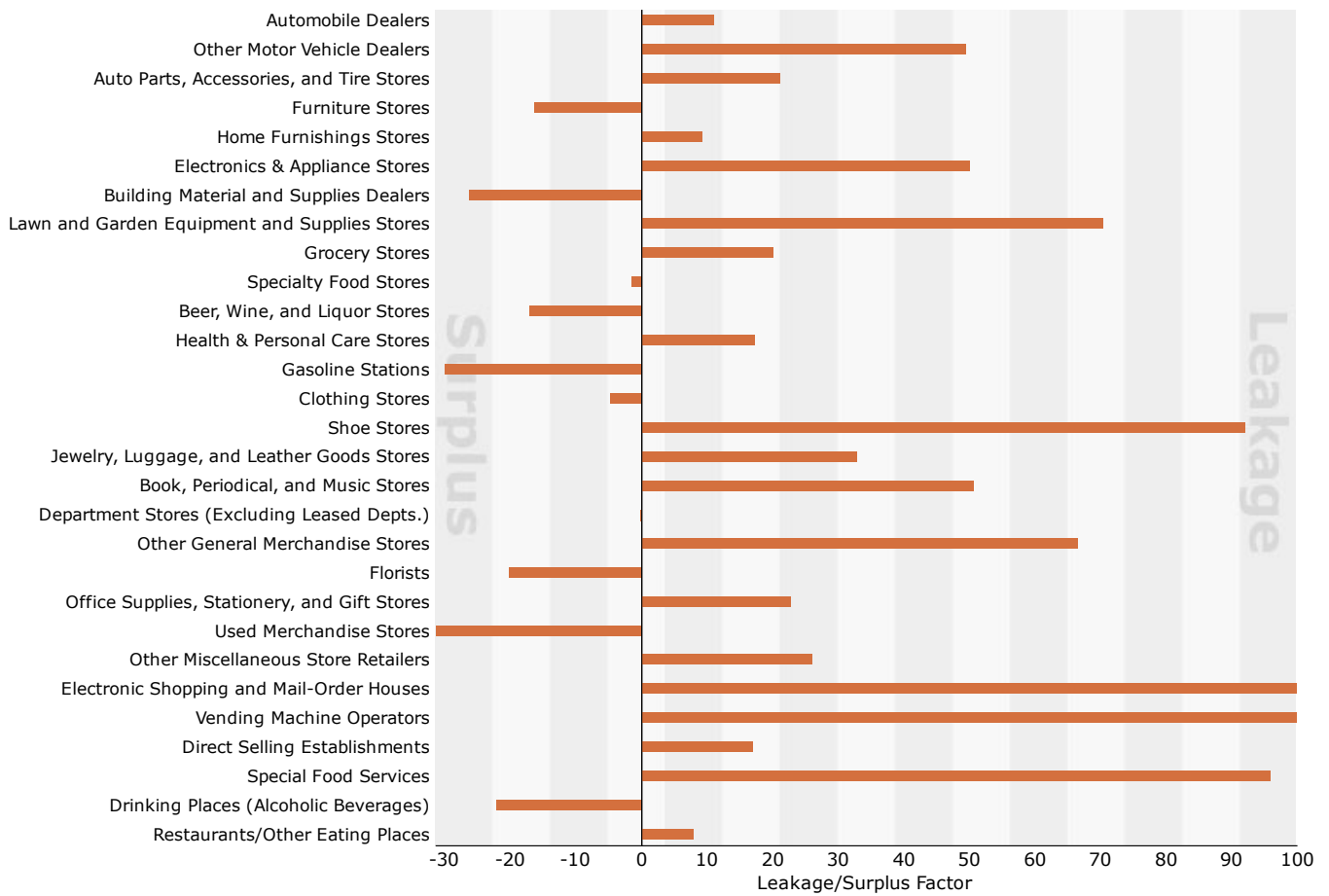
Source: Esri and Infogroup. Retail MarketPlace 2016 Release 2. Copyright 2016 Infogroup, Inc. All rights reserved.

June 13, 2017

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



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