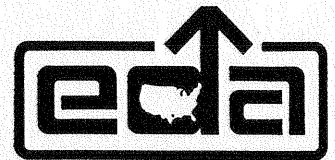


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Fox River Corridor Economic Development Feasibility Study

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FOX RIVER CORRIDOR ECONOMIC DEVELOPMENT FEASIBILITY STUDY

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East Central Wisconsin Regional Planning Commission

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ABSTRACT

TITLE: *FOX RIVER CORRIDOR ECONOMIC DEVELOPMENT FEASIBILITY STUDY*

AUTHOR: LDR International Inc.

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This study addresses the Fox River Corridor which extends through a nine-county area in East Central Wisconsin, from Green Bay on the north to Portage in the southwest. The corridor is 160 miles long, has 69 local governments, and is both urban and rural in character. The intent of the study is to assess the potential for economic development along the corridor, focussing on waterfront opportunities which could be enhanced by heritage designation and tourism-related development. The study looks at the impact of existing tourism activity in the corridor, assesses the potential of the area for increased activity, identifies potential opportunities and sites for waterfront development, and proposes implementation strategies to realize these opportunities. The study also develops a concept for a heritage center and tourism support complex adjacent to Lake Butte des Morts in the Oshkosh area.

The study confirms that the corridor, enhanced by a National Heritage designation and preservation of a 150-year old lock system, has significant potential for increased use by residents and visitors, not only for boating, but for river access, recreation, building sites and tourist attractions. It concludes that while there are currently 4.7 million annual visitors generating over \$930 million within the corridor, the tourism segment of the economy is below state and national averages. With heritage corridor designation, a ten percent increase in visitation can be expected, generating an additional \$74 million in annual spending. This increased economic activity could result in demand for an additional 450 motel rooms and 120,000 square feet of tourism business expansion.

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1.0 Introduction

The purpose of this study is to assess the potential for economic development along the Fox River Corridor. The focus is on waterfront development opportunities which could be enhanced by heritage designation and tourism related development. The Fox River represents an asset for the several communities along the river which can be utilized more effectively to expand the regional economy.

The area for the study includes nine counties in Wisconsin which border the Fox River and Lake Winnebago. These counties are:

- Brown
- Calumet
- Columbia
- Fond du Lac
- Green Lake
- Marquette
- Outagamie
- Waushara
- Winnebago

The corridor, extending from Green Bay on the north to Portage in the southwest, is 160 miles long, and includes 69 local governments, some primarily urban, others predominately rural. They are not now coordinated with respect to the Fox River, although several efforts are underway to strengthen cooperation and a unified approach to the river's future development.

The Fox River, enhanced with its system of canals and locks, has been the underlying resource for the development of the region. It was the channel for early exploration and trading, the location of industry, the source of power, and the means of transportation and commerce. In recent years, the industries located along the river have spent millions of dollars restoring the water quality of the river.

Recently, many of the industrial and commercial uses of the river have declined or moved. Opportunities for new uses and new forms of economic development now exist. Because of the domination of industry and the poor water quality, the river was not, in the past, appreciated as a natural resource for residents' daily use. Now, there are opportunities for

more public access, recreation, commercial development, and increased use by both residents and tourists.

Several circumstances are now converging to require an assessment and strategy for the river's future. One of the most critical issues is the future status of the canals and locks along the river. Those in the Upper Fox, above Lake Winnebago, have been transferred from the U.S. Army Corps of Engineers. For some time, the Corps has wanted to end its management and maintenance of the balance of the navigation system and transfer it to state and regional responsibility. This part of the system, in the Lower Fox, was put in caretaker status in 1984.

Negotiations have been going on for sometime for local assumption of the responsibilities of the locks, canals, and harbors of refuge (and occasionally, the water level controls). Although the system represents a very valuable resource for the community, some local governments and citizens have been reluctant to commit tax monies to the system, because of the mistaken belief that only a few elite members of the boating public would benefit from local management of the river. This system consists of 17 locks, several navigational channels, adjacent federal lands (some with lock houses) and four harbors of refuge on Lake Winnebago.

A second circumstance is the effort underway to designate the Fox-Wisconsin Rivers as a National Heritage Corridor by the U.S. Congress. There are currently three corridors now designated, and several more in various stages of recognition. This designation will bring recognition and investment into the area, and will be a key to providing a unified strategy to development, investment and promotion of the area. The river system of canals, locks, historic riverfront buildings and power plants is critical to heritage designation. Such designation is regarded as an important step in promotion of the area as a heritage tourism destination.

In addition, the Lower Fox has already been designated as a Scenic Urban Waterway by the state. And the Fox-Wisconsin Heritage Corridor is being studied for a heritage corridor initiative by the state and the National Trust for Historic Preservation. It is one of four areas in Wisconsin being studied, and one of 16 nationally.

There are many local waterfront efforts underway in the several communities along the river, as well.

This study examines the potential for development from an economic and urban design perspective, taking a broad overview of the area. It focuses on major waterfront development opportunities and the potential impact from

tourism. While tourism alone cannot justify all development, it can lend support to critical projects, and additional tourism activity in the area can result from certain waterfront (and heritage corridor) development.

This study includes: an economic overview of the area, a review of the state of tourism in the area, an assessment of existing waterfront development and plans, an evaluation of the impact of heritage designation and system management, identification of major development opportunities along the river, and a discussion of strategies for implementation. A discussion of the lock system is included, as is an illustrative plan for combining tourism and recreation development at a site outside Oshkosh.

2.0 An Economic Overview

Development potential in an area is derived from the overall economic potential. In general, the Fox River Corridor is relatively healthy, experiencing growth, and in an advantageous position for the future. This section of the study will deal with population growth, employment change, and tourism related employment. The tourism focus is an important one for this study. A series of tables are presented here to show principal data and information.

2.1 Population Change

The Fox River area had substantial growth during the period 1980-1990. As a whole, the nine county area grew 7.4 percent, reaching almost 700,000 people in 1990. The growth in the area was faster than that in Wisconsin as a whole, which grew just 4.0 percent. However, the overall growth was less than the increase in population for the United States as a whole, which increased 9.8 percent during the decade.

Although the overall growth was healthy, the rate of growth was not uniform for individual counties. This is shown in Table 1. The counties which grew the most were the urban ones: Brown, Outagamie and Winnebago. Together, these three counties had 83 percent of the population growth for the nine county area, and by 1990 comprised 68 percent of total area population. Although Calumet had a very rapid rate of growth, most of the smaller counties experienced slower growth. Fond du Lac also had little population expansion.

Although the state's population projections have not been updated yet since the census, in general, this growth pattern will continue, with the three counties getting a projected 60 percent of growth. The projections have assumed a higher rate of growth from 1990 to 2000 than that experienced in the prior decade: an 8.7 percent increase by 2000. From 1990-1992, 1.9 percent of increase has occurred. Table 2 shows population in the nine counties for 1990, 1992 (estimated) and 2000 (projected).

Table 1
Population, 1980-1990
State of Wisconsin & Fox River Corridor

	1980	1990	Change Number	Change Percent
State of Wisconsin	4,705,642	4,891,769	186,127	4.0%
Fox River Corridor	647,403	695,243	47,840	7.4%
Counties:				
Brown	175,280	194,594	19,314	11.0%
Calumet	30,867	34,291	3,424	11.1%
Columbia	43,222	45,088	1,866	4.3%
Fond du Lac	88,694	90,083	1,119	1.3%
Green Lake	18,370	18,651	281	1.5%
Marguette	11,672	12,321	649	5.6%
Outagamie	128,730	140,510	11,780	9.2%
Waushara	18,526	19,385	859	4.6%
Winnebago	131,772	140,320	8,548	6.5%

Source: U.S. Census; Wisconsin Dept. of Administration; LDR International, Inc.

Table 2
Population 1990, 1992, 2000
Fox River Corridor, By Counties

Counties	1990	1992*	2000**	Change 1990-2000
Brown	194,594	198,696	214,987	20,393
Calumet	34,291	34,779	41,932	7,641
Columbia	45,088	45,823	48,898	3,810
Fond du Lac	90,083	91,217	94,871	4,788
Green Lake	18,651	18,856	21,062	2,411
Marquette	12,321	12,562	14,464	2,143
Outagamie	140,510	143,765	150,711	10,201
Waushara	19,385	19,655	22,747	3,362
Winnebago	140,370	142,972	146,040	5,760
Fox River Corridor	695,243	708,315	755,712	60,469

* Estimate

** Projections (done before 1990 Census)

Source: Wisconsin Department of Administration; LDR International, Inc.

2.2 Employment Change

The nine counties, like Wisconsin, have a relatively low rate of unemployment, and a healthy rate of job growth. Table 3 presents overall employment and unemployment in the state and Fox River Corridor from 1980 through 1992. From 1980 to 1990, the corridor had growth in employment of almost 17 percent, although the rate has declined in the last two years. In 1992, the unemployment rate was a relatively low 5.2 percent and there were almost 375,000 jobs in the nine county area.

Tables 4 and 5 present data on covered employment growth and change for the five years between 1986 and 1991, the first for the state, the second for the Fox River Corridor. The corridor employment grew at a rate of 18.4 percent during the period, while the state grew 13.6 percent. However, the differences in sector employment are important to note. The corridor has a greater share of manufacturing employment than the state. Both showed an increase in the absolute number of manufacturing jobs, but a decline in the manufacturing share of employment.

Overall diversification is important in an economy, because it provides variety of employment and insulation to economic change. The Fox River area does not differ a great deal from Wisconsin as a whole in job diversification.

Table 6 shows covered employment change within the Fox River area. Again, growth is not uniform throughout the nine counties. The three counties, Brown, Outagamie and Winnebago captured 81 percent of the job growth between 1986-1991. Although Fond du Lac did not have much population growth, it had impressive employment growth in this period. Again, the rural, smaller counties had less or little employment growth, excepting Columbia. Together, the nine counties added almost 52,000 jobs.

2.3 Tourism Employment

Because of the focus on tourism, this section covers employment in tourism. As there is no specific "tourism" industry, employment impacted by tourism must be extracted from broader employment categories. The U.S. Travel Data Center uses employment in the lodging industry, eating and drinking places, amusement and recreation, and transportation as travel-related employment. Wisconsin, at the Tourism Research and Resource Center, UWEX, uses similar surrogates for tourism employment (without the

Table 3
Employment, 1980, 1985, 1990, 1991, 1992
State of Wisconsin, Fox River Corridor

Year	Labor Force	Employed	Unemployed	Percent Unemployed
State of Wisconsin				
1980	2,339,000	2,172,000	167,000	7.1%
1985	2,373,000	2,202,000	171,000	7.2%
1990	2,587,000	2,474,000	113,000	4.4%
1991	2,593,000	2,453,000	140,000	5.4%
1992	2,717,000	2,587,000	130,000	4.8%
Fox River Corridor				
1980	343,300	318,800	24,500	7.1%
1985	346,700	321,600	25,100	7.2%
1990	389,100	371,900	17,200	4.4%
1991	387,900	367,200	20,700	5.3%
1992	394,700	374,300	20,400	5.2%
Change in Employment				
1980-1990	State of Wisconsin		302,000	13.9%
	Fox River Corridor		53,100	16.7%
1990-1992	State of Wisconsin		113,000	4.6%
	Fox River Corridor		2,400	0.7%

Source: Wisconsin Dept. of Industry, Labor and Human Relations; LDR International, Inc.

Table 4
Employment by Industry, 1986-1991 (covered)
State of Wisconsin

	1986		1991		Change	
	Number	Share	Number	Share	Number	Percent
Agriculture, Forest, Fishing, Mining	18,103	0.9%	22,274	1.0%	4,171	23.0%
Construction	67,934	3.5%	86,586	3.9%	18,652	27.5%
Manufacturing	514,813	26.2%	547,503	24.6%	32,690	6.3%
Transportation, Communication	88,259	4.5%	103,263	4.6%	15,004	17.0%
Wholesale Trade	100,617	5.1%	117,107	5.2%	16,490	16.4%
Retail Trade	376,387	19.2%	424,874	19.1%	48,487	12.9%
F.I.R.E.	105,591	5.4%	122,556	5.5%	16,965	16.1%
Services	396,113	20.2%	494,649	22.2%	98,536	24.9%
Government	294,360	15.0%	310,790	13.9%	16,430	5.6%
Total	1,962,177	100.0%	2,229,602	100.0%	267,425	13.6%

Source: Wisconsin Dept. of Industry, Labor and Human Relations; LDR International, Inc.

Table 5
Employment by Industry, 1986-1991 (covered)
Fox River Corridor

	1986		1991		Change	
	Number	Share	Number	Share	Number	Percent
Agriculture, Forest, Fishing, Mining	2,969	1.1%	3,762	1.1%	793	26.7%
Construction	12,248	4.3%	16,451	4.9%	4,203	34.3%
Manufacturing	91,188	32.3%	97,573	29.2%	6,385	7.0%
Transportation, Communication	13,575	4.8%	18,833	5.6%	5,258	38.7%
Wholesale Trade	14,129	5.0%	15,664	4.7%	1,535	10.9%
Retail Trade	52,935	18.7%	62,911	18.8%	9,976	18.8%
F.I.R.E.	11,652	4.1%	16,165	4.8%	4,513	38.7%
Services	50,953	18.0%	67,403	20.1%	16,450	32.3%
Government	33,098	11.7%	35,889	10.7%	2,791	8.4%
Total	282,747	100%	334,651	100%	51,904	18.4%

Source: Wisconsin Dept. of Industry, Labor and Human Relations; LDR International, Inc.

Table 6
Employment, 1986-1991 (covered)
Fox River Corridor, By Counties

Counties	1986	1991	Change	
			Number	Percent
Brown	86,685	104,034	17,347	20.0%
Calumet	9,765	9,643	(122)	(1.2)
Columbia	14,373	17,286	2,913	20.3
Fond du Lac	34,086	40,366	6,280	18.4
Green Lake	6,640	6,604	(36)	(0.5)
Marquette	2,428	2,947	519	21.4
Outagamie	62,447	75,809	13,362	21.4
Waushara	4,203	4,611	408	9.7
Winnebago	62,120	73,351	11,231	18.1
Fox River Corridor	282,747	334,651	51,904	18.4%

Source: Wisconsin Department of Industry, Labor and Human Relations;
LDR International, Inc.

transportation component). Although these categories represents employment serving both residents and visitors to an area, they are the best measures available of tourism impact.

The latest information published for both the U.S. and Wisconsin on travel-related employment is for the year ending 1990. Table 7 shows HRT (hospitality, recreation and tourism) employment for Wisconsin and the Fox River Corridor for 1986 and 1990. In this tourism related employment, the study area grew slightly faster than the state as a whole. In the four year period, it grew 14.4 percent; the state, 13.0 percent. The importance of tourism to an area can be indicated by the relative share of total employment it represents. In the case of the Fox River, the relative shares of travel-related employment are very similar to the state as a whole. In each case, this employment represents about nine percent of total employment.

In terms of tourism growth, both Wisconsin and the Fox River Corridor, by this measure, are growing at about the same rate as the U.S. as a whole. The U.S. travel-related employment (excluding transportation) grew 13.1 percent between 1986-1990.

Not each of the counties in the Fox River corridor experienced the same growth, however. Table 8 shows the change in HRT employment for the corridor from 1986-1990. Of the three major growth counties, only Brown had growth in tourism employment that was faster than the area as a whole.

Table 9 shows the relative importance of tourism employment to each county, expressing it as a share of total 1990 employment. Obviously, tourism employment is more important to Columbia, Marquette, and Waushara Counties. In Outagamie and Winnebago Counties, tourism employment, relative to total employment, is the lowest in the nine county area. This suggests that the rural counties are more dependent upon tourism, and that at least two of the major urban counties have the most to gain in developing tourism. One county, Columbia, is recognized as a tourist area, because the Wisconsin Dells are located in its northwestern corner. Much of the tourism activity there, however, is in Sauk County adjacent to Columbia.

For the entire area, however, the prospects for expanding tourism are significant, because there is already a base to build on, and enough growth in the area to encourage investment.

Table 7
Hospitality, Recreation, Tourism, Employment, 1986-1990
State of Wisconsin and Fox River Corridor

	1986	1990	Change		Percent of Total Employment	
			Number	Percent	1986	1990
State of Wisconsin	178,928	202,190	23,262	13.0%	9.1%	9.1%
Eating and Drinking Places	139,077	150,255	11,178	8.0%	7.1%	6.8%
Lodging	19,727	24,522	4,795	24.3%	1.0%	1.1%
Amusement, Recreation	20,124	27,413	7,289	36.2%	1.0%	1.2%
Fox River Corridor	25,363	29,024	3,661	14.4%	9.0%	8.9%
Eating and Drinking Places	19,977	22,130	2,153	10.8%	7.1%	6.8%
Lodging	2,754	3,425	671	24.4%	1.0%	1.1%
Amusement, Recreation	2,632	3,469	837	31.8%	0.9%	1.1%

Source: *Tourism Research and Resource Center, UW - Extension;*
LDR International, Inc.

HRT employment includes that in Eating and Drinking Places, Hotels, Motels and other lodging, and Amusement and Recreation. It is an indication of tourism impact.

Table 8
Hospitality, Recreation, Tourism Employment, 1986-1990
Fox River Corridor, By Counties

Counties	1986	1990	Change	
			Number	Percent
Brown	7,374	8,811	1,437	19.5%
Calumet	761	899	138	18.1
Columbia	2,051	2,386	335	16.3
Fond du Lac	3,342	3,716	374	11.2
Green Lake	591	597	6	1.0
Marquette	304	367	63	20.7
Outagamie	5,250	5,923	673	12.8
Waushara	496	666	170	34.3
Winnebago	5,194	5,659	465	8.9
Fox River Corridor	25,363	29,024	3,661	14.4%

Source: *Tourism, Research and Resource Center, UW - Extension;*
LDR International, Inc.

Table 9
Hospitality, Recreation, Tourism Employment, 1990
Compared to Total Employment
Fox River Corridor, By Counties

	Total Employment	HRT Employment	Percent of Total Employment
Brown	101,035	8,811	8.7%
Calumet	10,068	899	8.9%
Columbia	16,507	2,386	14.5%
Fond du Lac	39,770	3,716	9.3%
Green Lake	6,630	597	9.0%
Marquette	2,929	367	12.5%
Outagamie	73,380	5,923	8.1%
Waushara	4,593	666	14.5%
Winnebago	70,409	5,659	8.0%
Fox River Corridor	325,321	29,024	8.9%

Source: LDR International, Inc.

3.0 Tourism in the Fox River Corridor

Tourism is an important industry and can be utilized to support development in the Fox River Corridor. In return, water-oriented development in the corridor can increase tourism in the area. This section covers the importance of tourism, a discussion of attractions in the area, accounting of lodging facilities and a review of tourism market segments, and the source market for area tourism.

3.1 The Importance of Tourism

Tourism is an industry with many benefits. It creates jobs and income, but also provides other benefits to communities. Tourism can support urban development and redevelopment. It can enhance local activities by adding to the existing market support. It often allows communities to enjoy a richness of events, activities and facilities that would not be possible only with the local market.

Tourism can enhance an area's image, by bringing people into the area who can then observe its attractiveness and may subsequently invest. Tourism can draw businesses, investments, attention, and money into a community.

While tourism is present in the Fox River area, its relative importance varies by county. And tourism has yet to be used to enhance the waterfront areas of most communities in the corridor. Review of current occupancies and attendance at events suggests that most tourism is either business oriented, or focused on outdoor recreation. The urban areas are not, for the most part, attracting significant numbers of recreational visitors.

3.2 Visitor Attractions in the Fox River Corridor

Visitor attractions consist of many kinds. In the study area, there are state parks, major tourism events, shopping, sports and entertainment, museums and recreational activities. Although there are many attractive museums and cultural facilities, attendance at most is quite low.

Table 10 shows some selected visitation figures for the Fox River Corridor. Although every area within the corridor lists numerous attractions, few have significant attendance. The major museum type attraction is the EAA Museum, which is probably the only museum in the area with any national reputation and attendance. It draws 162,000 per year, about 29,000 during the yearly fly-in. The Packer Hall of Fame is next, with some 75,000. There are no other facilities attracting more than 50,000 per year in visitation. The National Railroad Museum is a very fine collection and display of trains, drawing only 40,000 per year. The Outagamie Museum, with its Houdini exhibit drew about 20,000. The National Trust for Historic Preservation has documented many fine examples of heritage attractions, but few draw any significant attendance, even Heritage Hill, with its collection of historic buildings.

The greatest number of visitors coming into the area come for events, entertainment and sporting events. The annual EAA Fly-In drew an estimated 830,000 at its recent fly-in. Oneida Bingo is a large draw, having some estimated 600,000 attendance. The Green Bay Packers bring 360,000 annually to Lambeau Field. A considerable number of attendees at these events are from out of the area, hence tourists.

As will be shown later, there are significant numbers of visitors coming into the area. However, they are not visiting the attractions, either because they do not know about them, are not interested, or have been there already.

Major tourist attractions can draw upwards of 500,000 elsewhere, even where the existing population base and nearby markets are much smaller. Given the numbers coming to events, the potential for greater attendance at area museums and attractions is significant. A recently opened Children's Museum in Appleton is demonstrating the potential for good attractions. It has already exceeded its initial projections, and may reach attendance approaching 200,000 in its first year.

Shopping here, like elsewhere is an important attraction. Data available from UWEX indicate that there is considerable spending in the urban portions of the Fox River Corridor for general retail merchandise, well in excess of what would be expected from available personal income. In Brown County, the excess (from 1989 data) was 121 percent; in Outagamie, 84 percent; in Fond du Lac, 58 percent; and in Winnebago, 30 percent. These areas serve a regional shopping market.

Table 10.
Selected Attractions Visitation
Fox River Corridor

State Parks		
High Cliffs	600,000	
Heritage Hill	43,000	
Events		
EAA Annual Fly-In	830,000	
Sports, Entertainment		
Oneida Bingo	600,000	
Green Bay Packers	360,000	
International Raceway	166,000	
Appleton Foxes	85,000	
Museums		
EAA Museum	162,000	(29,000 at fly-in)
Packer Hall of Fame	75,000	
National Railroad Museum	40,000	
Outagamie Museum	20,000	(+17,500 at Octoberfest)
Bergstrom-Mahler Museum	19,000	
Grignon Mansion	5,600	
Hearthstone	5,000	
Local Parks		
1000 Islands Environmental Center	49,000	
Gordon Bubolz Nature Preserve	32,000	
Shopping		
Fox River Mall		
Manufacturer's Marketplace Discount Mall		
New Museum		
Children's Museum	150,000-200,00	*

* Estimate

3.3 Lodging Facilities

Table 11 presents information on the lodging facilities available in the Fox River Corridor. These data are the major indication that the area has room for improvement in attracting tourists. The information here shows the number of rooms in lodging facilities in the state, and for each county in the corridor. It also shows growth from 1982 to 1991. The growth in number of rooms in the state was 11.3 percent from 1986 to 1991; in the Fox River area; 10.5 percent.

As of 1991, the Fox River Corridor had almost 9,600 lodging rooms. However, when compared to the state as a whole, the area was underserved. The area, as shown in the table below, in 1990 had 14.2 percent of the population; in 1991, 15.0 percent of state employment; but in 1991, only 10.1 percent of the state lodging rooms. Based on the area share of other economic indicators, this was only about two-thirds of the expected.

Fox River Corridor: Share of Wisconsin

1980 Share of population	13.8%
1990 Share of population	14.2%
1986 Share of employment	14.4%
1991 Share of employment	15.0%
1982 Share of lodging rooms	11.4%
1986 Share of lodging rooms	11.3%
1991 Share of lodging rooms	10.1%

While the area is increasing its share of population and employment, it appears to be declining in its share of lodging. This may be due to the lack of recreational tourism in the area.

The number of lodging rooms in the area is also inflated by the number in Columbia and Green Lake Counties. These represent some 29 percent of all rooms in the nine counties. The urban areas have an even lower share of rooms, if these are excluded.

Table 11.
Lodging Facilities, Rooms, 1982, 1986, 1991
State of Wisconsin
Fox River Corridor

	1982	1986	1991	Change 1986-1991	
				Number	Percent
State of Wisconsin	75,164	76,604	85,259	8,655	11.3%
Fox River Corridor	8,565	8,675	9,582	907	10.5%
Counties:					
Brown	1,894	2,043	2,170	127	6.2%
Calumet	111	101	101	0	0%
Columbia	1,565	1,564	1,719	155	9.9%
Fond du Lac	1,026	1,020	1,047	27	2.6%
Green Lake	878	866	1,026	160	18.5%
Marquette	463	424	409	(15)	(3.5%)
Outagamie	1,013	1,061	1,390	329	31.0%
Waushara	409	384	351	(33)	(8.6%)
Winnebago	1,206	1,212	1,369	157	13.0%

Source: Tourism, Research & Resource Center, UW - Extension;
LDR International, Inc.

3.4 *Tourism Market Segments*

Lodging facilities are very important in determining the impact of tourism, because it is the visitor who stays overnight in paid facilities who makes the largest impact on the economy. The visitor market is a diverse one. It consists of those who travel for pleasure and for business, with groups or alone, who stay in paid accommodations or with friends and relatives, or who only visit for a day. The World Tourism Organization defines a "tourist" as one who travels away from home and spends the night. A day-tripper is called an "excursionist". In the U.S., we are not as careful to define our terms.

Whatever the definition, it is important to distinguish between market segments because different visitors have varying economic impacts on communities they travel to. Our impact analysis identifies a variety of different segments, to determine the market now served.

The market includes:

- Visitors in paid lodging
 - Business
 - Pleasure
- Campers at paid campgrounds
- Overnight visitors to friends and relatives
- Day trippers
 - Individual travelers
 - Group travelers

The next section of the report will estimate the current economic impact of tourists coming to the Fox River Corridor.

3.5 Tourism Source Markets

There have been several surveys of visitors to Wisconsin and to the Fox Cities area. While none are compatible with the nine county study area or the market segments identified here, they do help identify the origins of visitors and the potential source market for travelers to a heritage corridor. Most surveys are of recreational travelers, not business travelers. The survey of the Fox Cities area included visitors from within the study area, and we are trying to identify visitors from outside the nine county area. Even so, the source markets have been consistent in most tourism studies done in Wisconsin. And these are very similar to those for the Fox Cities area.

The primary market area for visitors to the Fox River Corridor includes all of Wisconsin, and the metropolitan areas of Chicago and Minneapolis/St. Paul. This is an area with 15.1 million people (including residents of the corridor) and it accounts for 85 percent of travel to the area.

The secondary market area for visitors to the Fox River Corridor are the following states, exclusive of the metropolitan areas already noted: Illinois, Indiana, Iowa, Michigan, Minnesota, and Missouri. This area includes an additional 28.3 million people. It accounts for about 10 percent of travel to Wisconsin.

Surveys that have been done for Wisconsin show that the market is the same for both overnight and day visitors. And the average visitor made six trips annually. Of all trips, one-third were overnight; two-thirds, day trips.

A survey done in 1990 asked a cross-section of visitors where they went in Wisconsin. Based on that information, it can be determined that about eight percent of the pleasure travel to Wisconsin came to the Fox River Corridor. This includes those going to the portion of the Dells in Columbia County. This was recreational or pleasure travel (as opposed to business), and would reinforce the evidence of lack of pleasure travel to the Fox River Corridor now. It has already been noted that the corridor's share of population and employment is 14 and 15 percent, respectively. Its share of pleasure travel is much lower.

Although there is a large market base for tourism to the area, the area has not reached its potential at this time. There is a significant opportunity to increase tourism and the benefits it brings.

4.0 *The Economic Impact of Tourism in the Fox River Corridor*

This section will assess the economic impact of tourism in the Fox River Corridor at the present time, first addressing the urban areas, and then the corridor as a whole.

4.1 *Impact from Lodging Facilities in the Urban Areas*

There are four urban areas in the corridor, each with a Convention & Visitors Bureau: Green Bay, Fox Cities, Oshkosh and Fond du lac. This part estimates the impact of tourists at hotels and motels here.

The most important economic impact for any tourist market is from guests who spend the night. These are both travelers for business and pleasure. According to reports by UWEX, there are about 9,600 hotel, motel, and B & B rooms in the nine county area. Of these, the records at the four CVB's show 6,230 in their areas. These four areas have the most travel, and dominate the market.

From the room tax revenues, it is possible to estimate the approximate room revenues at the facilities within the CVB's areas. These do not represent all business receipts to the hotels, for hotels have other sources of revenue (primarily food and beverage) from both travelers and local residents. Table 12 presents the estimates of room revenues and total tourist expenditures for those guests to the four areas: Green Bay, Fox Cities, Oshkosh, and Fond du Lac areas. These data are important for they are derived from "hard" information and can be applied to the remainder of the corridor estimates.

We estimate that overnight tourists in paid accommodations within the four CVB areas spent \$158 million in the community, in 1991.

For purposes of this analysis, throughout, we have not included spending for general retail merchandise, for although shopping is becoming a major tourist activity, general merchandise sales distort tourist spending and are not a good reflection of impact on the community. The US Travel Data Center (USTDC) does not include these sales in their economic impact modeling.

Table 12.
Revenue and Expenditures
by Lodging Facilities by CVB Area
Fox River Corridor, 1991

CVB Area	Rooms	Room Revenue (in millions of \$)	All Area Expenditures by Guests (in millions of \$)
Green Bay	2,670	\$24.30	\$69.40
Fox Cities	1,800	18.08	51.60
Oshkosh	940	7.65	21.90
Fond du Lac	820	5.28	15.10
Total	6,230	\$55.31	\$158.00

Source: CVB room inventories; hotel tax; LDR International, Inc.

4.2 The Impact of Hotel Visitors

This section estimates the impact of all overnight visitors to the corridor who stayed in paid facilities. Table 13 presents data on overnight guests at both hotels, motels and other lodging, and at campgrounds.

From an analysis of accommodation data, as shown in Table 13, we have estimated that some 1,344,000 tourists came to the Fox River Corridor area and stayed in motels, hotels, etc. during 1991. This is derived from information learned in interviews, from UWEX data on number of facilities and accommodations, and from some of the Davidson-Peterson Associates, Inc. impact studies. Davidson-Peterson have been preparing the economic impact studies for Wisconsin in recent years, and where appropriate, information from those studies is used here. Although we have followed the model in these impact studies, we have changed the assumptions about occupancies and rates because of our own interviewing and the data in Table 12.

Of hotel guests, we have estimated that 60-65 percent were traveling for business (including conventions and meetings) and 35-40 percent were traveling for pleasure. About 50 percent were from Wisconsin and 50 percent were from outside Wisconsin. The proportion of business travelers is quite large. Nationally, the USTDC estimates that about 27 percent of nights spent in hotels and motels are for business.

4.3 Campers

From the UWEX inventories, there are 13,700 camp sites in the Fox River Corridor area. This represents more than 20.0 percent of the camp sites in Wisconsin. Using estimates similar to those used by Davidson-Peterson, we have estimated that about 970,000 persons visited camp grounds in the Fox River Corridor area in 1991. These people represented an estimated 2,520,000 guest nights, and a very significant number of potential visitors to any future heritage attraction. Of these, about two-thirds are estimated to be from Wisconsin; one-third from outside Wisconsin.

Table 13.
Overnight Guests at Paid Facilities (Tourists)
Fox River Corridor, 1991

	Hotels, Motels, Other	Camp Grounds
Number of Facilities	490	120
Number of Rooms/ Sites	9,600 rooms	13,700 sites
Room/Site Nights Available	3,500,000	2,460,000
Occupancy	60.0%	30.0%
Occupied Room Nights/Sites	2,100,000	740,000
Average Party Size	1.6 persons	3.4 persons
Guest Nights	3,360,000	2,520,000
Average Length of Stay	2.5 days	2.6 days
Total Guests (Tourists)	1,344,000	970,000
Types of Guests		
Business/Meeting	60-65%	----
Pleasure	35-40%	100%
Source of Guests		
Wisconsin	50.0%	66.7%
Out-of-State	50.0%	33.3%

Source: Interviews; UWEX: Wisconsin's Tourism Establishments; Davidson-Peterson Associates, Inc.: Economic Impact Studies; LDR International, Inc.

4.4 Overnight Visits to Friends and Relatives

In estimating the impact of travel, those visiting friends and relatives are often overlooked, or misunderstood. The USTDC estimates that some 44 percent of all nights away from home is for visiting friends and relatives either as a major intent, or in conjunction with a holiday or vacation.

The Davidson-Peterson studies, by interviewing a cross-section of residents, makes estimates of the number of overnight visits in Wisconsin to friends and relatives. They estimated almost 2.0 visitors per resident. We have been more conservative, and estimated that for each resident in the study area (699,520) in 1991, there were 1.6 overnight visitors. This would be 1,120,000 visitors in 1991 staying with friends and relatives.

4.5 Day-Trips

The number of day-trippers is probably the most difficult to judge. Although we can make some assumptions about group tours (buses), estimates of other day-trippers is based only on impressions from major events, and attractions.

At this time, the Fox River Corridor does not attract many bus groups. We estimate that between 2,000-3,000 buses visit the corridor yearly. Each brings about 40 persons. This would mean 80,000 -120,000 bus travelers per year. We have averaged this to an estimated 100,000. Of these, 80 percent are judged to be day-trips, or 80,000 persons. (The over-night bus groups are already included in the hotel, motel occupancies.)

The National Tour Association publishes statistics about estimated bus travel, expenditures, estimates, etc. They determined that between 1989-1990, bus trips and travelers increased 12 percent. Newer statistics are not available, however, growth is known to have slowed, and even declined in some cases. We know there is significant room for increasing this in the Fox River Corridor. The attractions are just beginning to solicit buses. (And they must be solicited.) The Outagamie Museum estimates it gets two buses a month. Heritage Hill attracted 30 bus tours in 1992. The Pioneer Princess gets very few buses at this time. By contrast, Circle Wisconsin, an organization that promotes bus travel to the state, estimates that 3,200-3,500 bus tours yearly go to the House on the Rocks.

The independent day-trips from outside the corridor are estimated here to be about 1.2 million persons per year, comprised of visitors to the EAA fly-in, Oneida Bingo, Packer football games, and other attractions. A survey by the Green Bay CVB determined that of visitors to its attractions, about 50 percent say they stay overnight in the area.

These day trips do not include business day trips to the area or day trips within the corridor. In fact, there is considerable day travel within the corridor, but it is excluded from the economic impact because it is not money brought into the area from outside.

4.6 Economic Impact

Based on the assumptions and estimates developed here, Table 14 provides estimates of the number, and spending of the various market segments to the Fox River Corridor.

The spending is divided between lodging and other spending. The spending by hotel, motel visitors is based on number of room nights and average costs, and is estimated to be about \$74 million for lodging and \$137 million for other travel costs (excluding interregional transportation). The total by this group is \$210 million, or about 52 percent of all spending in the area.

We estimate that the 970,000 campers spent a total of \$58 million, assuming \$60 per capita. (Davidson-Peterson estimates \$62 per capita.)

Davidson-Peterson estimated that those visiting friends and relatives overnight spent \$126 per person. We estimated about \$90 per person, for a total of about \$101 million.

The day-trippers have considerably less impact. We estimate that the bus passengers spend \$35 per person in the area, and the other day travelers spend \$25 per person per day.

The total estimated spending for the Fox River Corridor is estimated to be \$401.8 million in direct expenditures. This excludes major retail merchandise and interregional transportation (air fare). The impact of air fare cannot be easily determined at the local level.

Table 14.
Visitor Expenditures
By Market Segment
Fox River Corridor, 1991

Visitors Type	Number	Expenditures (in millions)			
		Lodging	Other	Total	Percent
Hotel, Motel, etc.	1,344,000	\$73.5	\$136.5	\$210.0	52.3%
Campers	970,000	7.4	50.8	58.2	14.5%
Visiting Overnight Friends, Relatives	1,120,000	---	100.8	100.8	25.1%
Day Trippers Group	80,000	---	2.8	2.8	0.7%
Other	1,200,000	---	30.0	30.0	7.5%
Total	4,714,000	\$80.9	\$320.9	\$401.8	100.0%

Source: Estimated by LDR International, Inc.

4.7 Total Visitor Impact

We estimate that the base tourist traffic to the Fox River Area, as shown in Table 14 is:

- 4,714,000 visitors
- \$401.8 million in direct spending
- \$530.4 million in indirect spending (Multiplier)
- \$932.2 million in total impact

The multiplier used here is the USTDC multiplier of \$2.32 for each tourist dollar spent.

4.8 Visitor Potential for Heritage Designation

Although the traveler impact numbers may seem impressive, in fact there is room for considerable growth in the area.

First, the hotel, motel travel is heavily business oriented. This provides a good basis of accommodations, but it can support considerably more pleasure travelers. The Fox Cities CVB has noted that 300 additional rooms are being added to their inventory.

Second, the low attraction attendance indicates that again the impressive number of travelers coming to the area are not patronizing the existing attractions.

Third, there is little bus travel into many parts of the area, as evidenced by the small percent of group travelers coming to attractions like Heritage Hill and the Outagamie Museum.

The area is well situated to draw more pleasure travelers. There is Door County on the North, and Dane and Sauk on the South. In addition to the Milwaukee area, these are three of the four counties having more than 5,000 hotel rooms. (The other is Vilas.) These are also areas which are growing.

There is evidence that the Fox River Corridor is not a significant pleasure travel area. Although it has about 14 percent of population and 15 percent of state employment, it has just 10 percent of hotel rooms, and eight percent of pleasure travel. It also has few seasonal restaurants, as inventoried by UWEX, and these are indicators of vacation travel. In the state as a whole, 6.2 percent of restaurants are seasonal; in Fox River, only, 4.9 percent. By contrast, Door, Sauk and Vilas have between 23 and 33 percent seasonal restaurants.

It is possible to estimate market penetration from the data available. Of the 4.7 million visitors identified, about 4.0 million are recreational. (We excluded day business travelers.) The average number of trips made per visitor was two in this area, therefore these visitors represented about 2.0 million different people. If 85 percent are from the primary market area, then this represents a market penetration of 11 percent. If 10 percent are from the secondary market area, this represents a market penetration here of less than 1 percent. There is considerable room for increasing pleasure or recreational tourism to the Fox River Corridor.

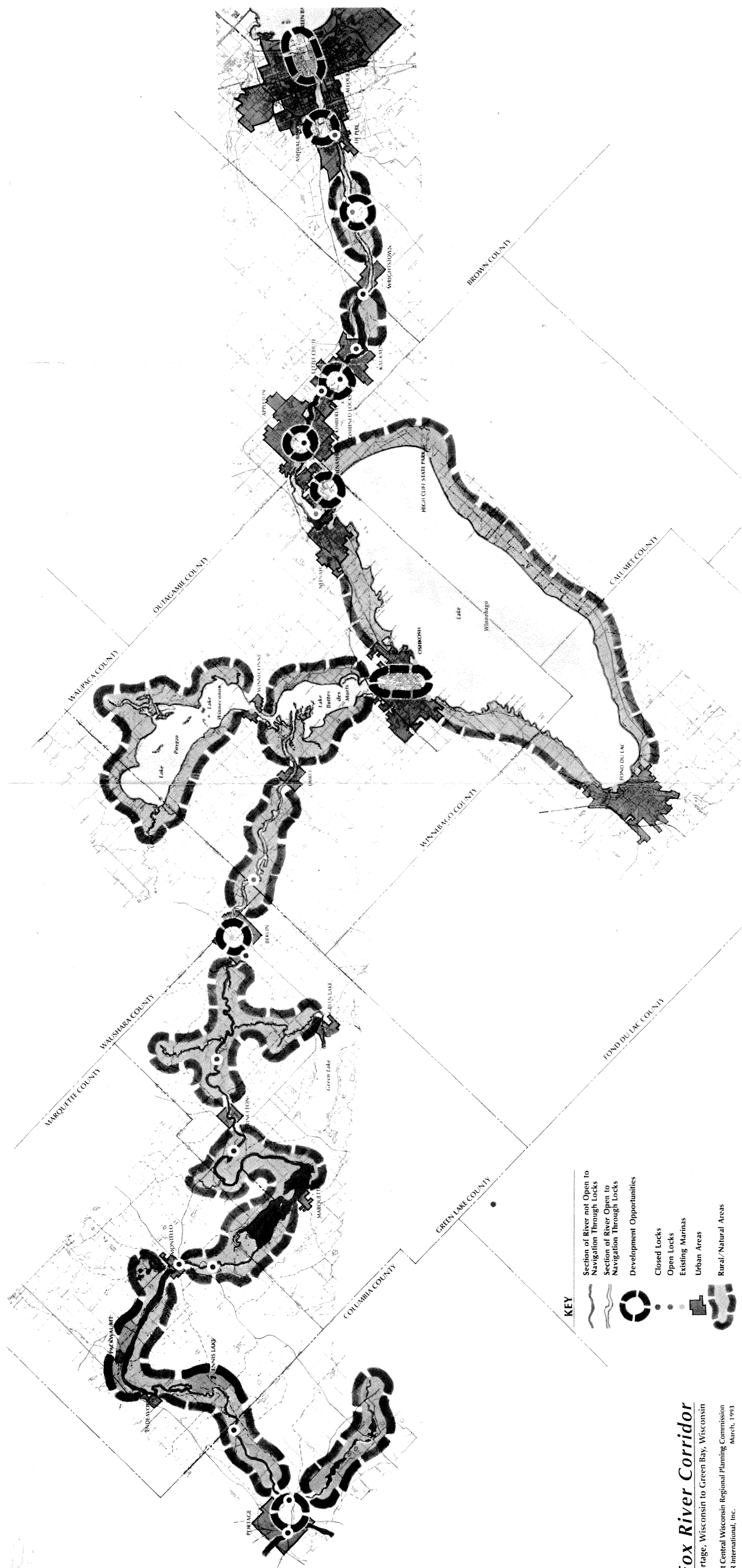
5.0 The Fox River Corridor Today -- An Assessment

While the assessment of the Fox River Corridor extends from Portage on the south to Green Bay on the north, the real focus of this effort is the lower Fox River, between Fond du Lac and Oshkosh on the south and Green Bay on the north. The rich heritage of this portion of the corridor is well-documented and the assessment is concerned more with current economic conditions, development opportunities and constraints, on-going planning, and the existing tourism base.

The material that follows is of necessity general in nature. It is designed to provide a broad view of the development opportunities and constraints primarily within the urban places within the Corridor.

The site assessment map, appended here, graphically illustrates the assessment of the Fox River Corridor. The urban, town and village areas are clearly indicated, along with the predominantly rural and natural areas. The difference between the predominantly rural, natural upper Fox and the more urban lower Fox is pronounced. The map also illustrates the system of Fox River Locks, identifying those that are open and closed. In addition, existing harbors and marinas are indicated. Most significantly, the major development opportunity sites are defined with an emphasis on the Lower Fox Corridor, and predominantly in the Menasha, Appleton, Combined Locks, Little Chute and Kaukauna urban complex on the south; and the Green Bay/De Pere area to the north.

There are several general findings resulting from the Corridor assessment: (1) rural and natural areas in the Lower Fox should be preserved before the entire area becomes one long urban corridor; (2) the Lower Fox Corridor can benefit from a focus more on the cultural heritage opportunities as a basis for tourism development; (3) the Upper Fox should be preserved and conserved primarily as an open, natural corridor experience; and (4) the region will be enhanced greatly if connected by a navigable waterway.



Fox River Corridor

Portage, Wisconsin to Green Bay, Wisconsin
 East Central Wisconsin Regional Planning Commission
 LDR International, Inc. March, 1993

-
- Milwaukee Road Station site includes five acres and historic station building. The Chamber of Commerce owns and occupies the building. The balance of the site is proposed for mixed-use development and will include relocation of Washington Street. This site is also mentioned as a possible location for the proposed new waterfront attraction.
 - Wisconsin Central Railroad site includes two acres proposed for planned extension of waterfront park.
 - Heritage Hill Park plans to expand down to the waterfront. This expansion will enhance the park's image as a major local attraction.

Green Bay, like Appleton and Oshkosh, has initiated some excellent planning for its urban riverfront. Implementation of several projects is underway. The proposed new riverfront public attraction would add considerably to the City's tourism critical mass; further reinforcing Green Bay as one of several tourism anchor cities in the Fox Corridor.

De Pere -- This delightful small town is located south of Green Bay on the Fox River. It has an excellent riverfront location with historic locks, buildings and a historic Main Street. It is easily accessible from Green Bay and Fox cities as a secondary day-trip destination. The City and DNR are installing several new boat ramps in the area and a Madison developer is undertaking a major adaptive use redevelopment project for housing. This Voyager Park development is located on the waterfront and is of interest both as a place of residence and business, as well as an interesting place to visit. Voyager Park is a model for urban riverfront regeneration within the Fox Corridor.

Major attractions in De Pere include the historic district, White Pillars Museum, St. Norbert's College and Abbey, the Old Union Hotel and historic Main Street. The City's Main Street program appears to be quite successful and should be a model for other communities in the Fox River Corridor.

Development opportunities and constraints in De Pere are not great in number. The greatest opportunity, or asset, is the downtown and riverfront area as a special place. On the negative side, development constraints involve the need for a new bridge across the river and the fact that the community is mostly against the "Fox River Trail" and the town won't invest any funding for this project.

The major development opportunity site in De Pere is located across the river from downtown. This is a 40-acre site adjacent to the U.S. Paper Plant (Lee Building) and it is available for development. The site is also next to the County Fairgrounds site, which may also become available in the future.

Little Rapids -- Between Wrightstown and De Pere, there is potential at the Little Rapids lock and dam to establish a regional park on the eastern shore of the river.

Kaukauna -- This community also has a rich heritage and the potential to enhance its downtown area. Major emphasis on the river in this community has been at the Thousand Islands Park, with its extensive nature trails and a nature center.

Future opportunities include more effective utilization of the Grignon Mansion, run by the Historic Society. The City is interested in urban riverfront housing and the possible development of canoe and kayak trails -- perhaps even a whitewater kayak course.

Opportunity sites in the town include the Quarry site and the upper Thilmany Pulp and Paper Mill site, by the lift bridge. This site may have potential for housing.

Combined Locks -- The waterfront in this community is heavily impacted by the Appleton Paper Mill and that company's current \$170 million expansion. The expansion will cover the old residential community and this mill will be in operation for a long time to come. Potential riverside uses in Combined Locks include a fishing pier with handicap access, and the opportunity for creating a scenic walk along the railroad line with some seating areas. Excellent fishing exists in the area below the power plant and the railroad corridor should be considered for future rapid transit.

Kimberly -- This small community has relatively little waterfront development or potential except at Sunset Park. Sunset Park is a nationally recognized softball center with a traditional park surrounding these facilities, plus boat ramp and trails. While primarily a community park, Sunset Park has the potential to become more river-oriented and region-serving. It provides an ideal stopping point for canoe and kayak trips coming from Telulah Park in Appleton.

Little Chute -- This small community on the north shore of the river, opposite Combined Locks and Kaukauna is another historic town with good potential for downtown revitalization. The major opportunity here involves the island at Combined Locks Dam which could be converted to a park, and the nearby 9.0 acre sanitarium site, owned by the County. The latter is a beautiful site; however, there may be environmental problems. It is to be sold by the county for residential development. It is an excellent site that relates well to the river and to the potential new park. The value of this site would be enhanced by Heritage designation and opening of the locks.

Appleton -- Like Green Bay, Oshkosh and Fond du Lac, Appleton is a major anchor in the Fox River Corridor. The river runs through the heart of the city and the City government is quite interested in development of adjacent opportunity sites. The City has prepared a master plan for the river corridor within the city that includes a river trails system, historic preservation of industrial buildings and identification of opportunity sites. The City is interested in establishing a stronger relationship between the river and downtown.

Within the Flats area adjacent to downtown are a number of opportunity sites. The city's Fox River Corridor Study suggests a number of potential development sites in the Flats and beyond. The historic Lincoln Mills and Fox River Mills adaptive reuse housing projects are excellent examples of bringing new viable uses to the riverfront.

Appleton has a strategic role to play in the Fox River Corridor strategy development. It has a number of assets which make it an important development center for the region. These development opportunities include:

- The Outagamie County Airport.
- The Fox River Mall (an upstate attraction).
- Strategic central location within the region and highway accessibility.
- Proximity to Oshkosh and Green Bay.
- The Houdini Historical Center and Outagamie Museum.
- Demonstrated success with a major riverside residential redevelopment project.

-
- Proposed paper museum.
 - Maximizing the use of historic falls, dams, locks and industrial infrastructure to create new and adaptive use development projects.

One of the most interesting new developments in Appleton is the Children's Museum, which opened in November, 1992 in the downtown Avenue Mall. It has been a huge success, attracting about 70,000 people during the first three months, exceeding the first year's projection for attendance of 30,000 to 50,000. The museum has brought increased life to the mall and visitors from Milwaukee and Chicago. It is an example of what tourism can be. Several area hotels are now promoting weekend travel to their business customers which includes admission to the museum in an effort to increase family occupancies.

Development constraints or issues include the following:

- Current lukewarm local political support for the Fox River National Heritage Corridor project. There is a need for a coalition representing a broad base of support to get behind the project.
- Limited public access to the river.

While limited in scope, there are several interesting development opportunity sites. The real challenge is finding some way to connect downtown with the river. Opportunity sites include:

- Vacant/underutilized land on the bluff overlooking Lincoln Mills. (Michiel's and Valley Bank parking.)
- Atlas Mills and Vulcan site identified in Appleton's "Upper Flats Development Opportunities".
- Historic Locktender's House and the surrounding property in The Flats.
- Peabody Park.
- Appleton Lock #4, island and Newberry Street/Telulah Park site.
- Institute of Paper Chemistry site (East South River Street).

Menasha -- Adjacent to Appleton, this small town has one of the best developed and most desirable riverfront areas within the region. Menasha clearly demonstrates what can happen through effective development of the riverfront area. In addition to the new downtown marina, there are two major parks: Jefferson and Smith located along the river. The City is currently exploring the opportunity of developing a 75-slip marina at Jefferson Park where there is a two-acre site that can be developed. There is excellent demand for marina slips in this area.

An interesting proposed development for this area is the Heckrodt Wetland Reserve that includes about 50 acres to be developed with trails, nature park and an "Outdoor Wisconsin" theme area. This is an excellent example of the kind of opportunity to be pursued as a part of the Fox River Corridor Strategy. The other development opportunity involves the frontage between Tayco Street and the Canal west of downtown to the lock. This would include a riverside walk and limited development.

Neenah -- The river flows through this city's downtown area, which has become a very successful specialty shopping center, with a good regional draw. Partial closing of the existing railroad bridge will allow boat traffic to come directly into the downtown area in the future. This already successful downtown needs to expand. There is a historic opera house and downtown business hotel, the Valley Inn. The Doty Cabin, operated by the Historical Society, is a major attraction, as are drive-by tours of the "paper baron" mansions. The Bergstrom Mahler Museum is also very popular.

Future opportunities in Neenah include a paper museum, river heritage center and expanded arts opportunities. All of these would be important to enhance tourism-based economic development.

Oshkosh -- Like Green Bay and Appleton, Oshkosh has an important role to play as one of the destination cities or "anchors" within the larger Fox River Corridor. The visitor business in Oshkosh has been fairly consistent with visitation accounting to about 19 percent in the first quarter, 26 percent in the second quarter, 35 percent in the third quarter (enhanced by EAA), and 20 percent in the fourth quarter. The city is currently attracting about 500 coach tours annually, with about 76 percent of the visitors coming from the Midwest area for day-trips. They have "themed" bus tours that go over very well. The theme is the Historical Society's 1940's "fashion show" and EAA spin-offs on military reunions. In 1991 they had 25 of these themed trips. Major attractions include the EAA Museum, Paine Art Center and Arboretum, Menominee Zoo and Park, Manufacturers Marketplace

Discount Mall, the Oshkosh-B'Gosh downtown store and Pioneer Princess Boat Tour.

The development opportunities and assets in Oshkosh are impressive. These include:

- The EAA annual event which brought 830,000 visitors to the area in 1992.
- The EAA Air Adventure Museum with 162,000 visitors annually.
- The Grand Opera House with seating for 720 people.
- Menominee Park and Marina on the Lakefront.
- Several important riverfront planned development opportunity sites.
- Strong demand for additional marina space and transient docking.
- Expansion of Riverside Park to include both sides of the river through downtown.

On the negative side there are several constraints that create problems for development in the area. These include:

- While the EAA is a very positive factor in the local tourism economy, there is one negative. A large number of government officials, particularly FAA officials, do not pay room tax, although there is no legal exemption. (Hotels may not understand the situation and do not apply the tax to bills.) Therefore, the Convention and Visitors Bureau does not benefit from this activity, although it requires a great deal of their time and effort.
- Local sources feel the area needs more attractions.

The City of Oshkosh is conducting planning studies within the downtown area that effect riverfront development. Several opportunity sites exist. These include:

- Potential relocation of a segment of Pioneer Drive in order to provide more riverfront land adjacent to the Pioneer Motel.

-
- The area of South Main Street, just below the bridge, is proposed for specialty retail development.
 - The area west of Oregon and north of the river is proposed for major redevelopment for mixed use and marina development.
 - South of the river and west of Main Street is a nine acre site owned by Morgan Properties. This proposed mixed-use development site is being considered for high-density residential.
 - West of the city an abandoned railroad line is being converted to a major hiking trail. The City would like to extend this system into the City to connect with the trails and promenades on either side of the river.
 - West of the city along U.S. Route 41 causeway and intersections with Wisconsin Routes 110 and 21.

Fond du Lac -- The entire lakefront within the City of Fond du Lac is publicly owned and no additional public or private development will be permitted. There is a limited amount of waterfront redevelopment east of the city, and for the most part, both the east and west shores beyond the city are very underutilized. What exists in these areas are aging "blue collar" resorts that are leftover from the 1930's and 40's. Aside from the need for additional marina space, there does not appear to be much potential or interest in further development of the city's waterfront area.

Current visitor attractions include the lake, the Galloway House and Village, Octagon House, Stained Glass-Making Exhibit, Goldsmith, Christmas Shop, St. Paul Cathedral, Hurricane Marsh Wildlife Refuge, Walleye Weekend, the County Fair, and the IAC International Airshow that is a companion to the EAA. A major new attraction based on an "Old Wisconsin" theme is being studied by a major attractions committee (MAC).

While not a great deal of interest was expressed in new development, other than the proposed new attraction, Fond du Lac is clearly the "southern anchor" within the Fox River Corridor.

Lake Winnebago Recreation Areas -- The lake provides a popular year-round recreational resource and attractions for the people in the immediate area and the region. Boating, fishing and ice fishing all have popular appeal. In addition to major access points in Menasha, Neenah, Oshkosh and Fond du Lac there are also trailer boat access points at Lake Park Road, Oneida Street (Waverly Beach), High Cliff State Park and Stockbridge. The north end of the lake is popular for general fishing while the area around Stockbridge is noted for sturgeon and ice fishing.

The major marinas serving the lake are all full and there appears to be a good market for additional boat slips. Demand for marina space would increase substantially if the river corridor were open. Much of this potential demand would come from people from outside the region and state.

5.2 Upper Fox River

While predominately rural and open in character, the Upper Fox has a number of small communities with great charm, beauty, historic structures and attractions that can enhance a heritage designation. These towns and villages include: Winneconne, Omro, Eureka, Berlin, Green Lake, Ripon, Princeton, Marquette, Montello, Packwaukee, Endeavor and Portage. Within the Upper Fox Corridor the Chambers of Commerce in five communities (Ripon, Green Lake, Berlin, Princeton and Marquette) have formed the **Green Lake Country Visitors Bureau** in order to jointly promote the area and towns as a tourism destination. All of the Upper Fox River communities and Counties have the potential for growth of rural heritage tourism, building on the scenic beauty, historic structures, quaint shops, unique restaurants, and recreation including fishing and boating. The major development opportunities are in Omro, Berlin, Green Lake and Portage.

Omro -- The Fox River flows through the heart of this charming small town, which has been revitalizing its downtown. It has four parks on the river, and is a very popular place for fishing, launching and mooring boats. There are attractive shops for tourists, an historic museum, and access to the lakes by boat. It is an excellent day trip destination by car or boat.

Winneconne -- This is a popular tourist destination, primarily by boaters, as it lies between Lakes Winneconne and Butte des Morts. It is one of the few locations having fishing from a bridge, and is a popular spot for fishing, mooring boats, seeing historic buildings, and dining. It has two well known waterfront restaurants that attract diners from throughout the area.

Eureka -- This is a small, quaint and protected community along the river which has a lock and dam operated by a yacht club. It has a small camp ground, public park, some interesting historic buildings and is used for fishing, boating and recreation.

Berlin --The "fur and leather capital" marks the end of motor navigation on the river. It has a well established historic district, some significant adaptive re-uses (including a hotel), a distinct Victorian flavor and interesting shops and lovely parks. One park lines the river; another is an urban commons complete with a gazebo. The downtown is continuing restoration. It has an old lock site and locktenders house, camping, golfing, boating and fishing. It is noted for its festivals and events which combine with the recreation and historic attractions to draw visitors all summer.

Green Lake --This community has a long tradition as an established resort area and second home location. The lake is the deepest in Wisconsin, and the area has drawn wealthy families from Milwaukee and Chicago for decades. It is a premier resort area with exclusive clubs, major golf courses, scenic beauty, charm and historic character. It has major recreational facilities and two conference centers. It is the "oldest resort community west of Niagara Falls."

Princeton --This is a small community on the river, but with little relationship to the water. The river is almost hidden from the town. It is noted as an antique center, with a regular Saturday flea market, antique shops and period architecture.

Marquette --This is another, older resort community on Puckaway Lake, less affluent than Green Lake. It has small resorts, campgrounds, and recreation centering on fishing and hunting. The lake itself is shallow and weedy.

Montello --This community is located at the end of Buffalo Lake, a linear lake created by damming the river, and by Lake Montello. It has an interesting downtown with a quarry and waterfall that attracts some attention. However, its principal asset is its location on the Ice Age Trail, a National Scenic Trail being developed by the National Park Service. This will be 1,000 miles of trail, interesting landscape, fishing, hunting, camping

and interpretation. This is one of eight scenic national trails in the country, and will offer the opportunity to link with the Fox River Heritage Corridor in Montello.

Ennis Lake --This is the location of the farmstead which was the boyhood home of John Muir and was called Fountain Lake. It is a county park and is considered important to the Sierra Club. Some interpretive development may occur here in time.

Packwaukee and Endeavor -- These are small communities on Buffalo Lake which are primarily local in use and areas for fishing and canoeing.

Portage --The anchor at the headwaters of the Fox River Corridor is a strategically located city at the site of the canal which linked the Fox and Wisconsin Rivers. Because of its location, it played a major role in the exploration, early settlement, trade and defense of the area. Fort Winnebago was sited here by the French. At this time, the city is considering a project to restore the lock and canal as a major component of downtown revitalization. It is also considering acquiring the site and reconstructing the fort. The city is considering the canal restoration, downtown renewal, together with pathways, plazas, and interpretive center as a catalyst for tourism and bringing residents into downtown. Redevelopment of Portage as a tourist destination can be valuable for the Fox River Heritage Corridor. An interpretive and visitors' center here could enhance tourism in the area. Portage is crossed by the Ice Age Trail and near the Wisconsin Dells. If it could serve as a linkage to these tourism attractions and bring more tourists into the Fox River Corridor. Conversely, a heritage corridor can enhance tourism in Portage if coordinated marketing occurs.

The Upper Fox River communities offer a wide range of opportunities for tourism. They represent a mixture of scenic beauty, historic exploration, quaint towns and villages, with unique shopping and dining. These are combined with recreation - fishing, boating, hunting, golfing and other sports. The assets of these communities will add to the richness of a heritage corridor.

There is one problem, in that the communities are not linked linearly along the river. Access from one to another is not directly following the river. If the communities are to be toured as a group, physical directions will need to be established between them.

5.3 Assessment Conclusions

This assessment and the assessment map clearly illustrate the wide range of tourism attractions within the upper and lower Fox River Corridor. At the present time, these attractions and the individual cities work essentially independently (except for the Fox Cities and Green Lake Country) and do not benefit from the richness of the regional attraction base. The existing array of attractions, plus the natural environment and the proposed National Heritage Corridor, provide the basis for a rich visitor experience, if properly marketed and promoted as a regional destination.

The area is not embarking on tourism development from scratch. Rather, there is a limited existing tourism attraction base to build on. The initial effort appears to call more for regional organization, marketing and promotion, than for investment in individual development opportunities and attractions. The potential for new development is discussed separately, but will also rely heavily on the creation of the corridor as a regional destination, rather than continued marketing and promotion of the individual cities and attractions.

Based on the assessment and evaluation of development opportunities within the Fox River Corridor, we believe that there is real potential to develop an enhanced tourism economy that focuses on the "National Heritage Corridor", in order to create an image that can be marketed to a larger visitor market than now exists.

6.0 *The Significance of the Corridor Designation and Locks*

There are two distinct, but related issues. One issue is the designation of the Fox River Corridor by the U.S. Congress as a National Heritage Corridor. The second issue is the assumption of the navigational system of locks, channels, and harbors from the U.S. Corps of Engineers. Both have real benefits for the community.

The preservation of the locks and channels will probably only happen if the state and local governments assume ownership and management of the system. The preservation of the resource is important to achieving a real heritage corridor. The locks are important to support the designation.

Even without designation, however, the locks and system are important. They represent an invaluable resource for the people in the Fox River Corridor.

There are two overriding elements that must be stressed:

- The primary benefits of preserving the locks and of achieving a heritage designation accrue to the residents of the area. While these may enhance tourism, tourism is not the total justification for either.
- The major reason to preserve the locks and navigational system is not for boating, but to enhance the waterfront use, recreation and development potential.

In the past, many attempts at quantifying the benefits and costs of the system have concentrated primarily on navigation and "on water" uses of the Fox River, including attention to water supply and flood control. The Corps Interim Disposition Report quantified benefits solely on specific water-related activities.

In fact, the potential economic impacts of the Fox River, its canals, locks and associated land represent benefits far in excess of navigational uses. They represent opportunities to provide new access to the river by residents for recreation, to develop residential and commercial uses along the river, and to increase tourism (and economic impacts) in the area.

6.1 The Value of Heritage Designation

There are many values associated with heritage designation. These include:

- Planning assistance from the National Park Service
- Coordination of development activities among governmental units
- Identification and protection of resources
- Federal funding support for planning and development
- An enhanced image, increased awareness and national recognition

The Fox River Corridor does not now have an image that can be used for destination marketing, whether for tourism or other economic development.

The purpose of the American Heritage Landscape program, as defined by the National Park Service, is to identify and protect those pieces of our heritage that the public wants to save. The strategy for saving them is to accomplish this without federal acquisition, ownership and management. While the major goal is to protect natural, cultural and scenic landscapes and structures, the protection must be in a context which recognizes the need for economic opportunity, enhancing the quality of life for residents, and preserving local and traditional ways of life. Tourism is not an explicit goal, but is recognized as compatible with preservation and economic development.

There are currently three federally designated heritage corridors: The Illinois & Michigan Canal; The Blackstone River Valley; and The Delaware & Lehigh Navigational Canal. In addition, there is the American Industrial Heritage Project in Pennsylvania. Each of these areas has received federal funding, federal technical support, and enjoyed support from state, local and private sources for money and attention.

The American Industrial Heritage Project, established in 1988 by Congress started receiving significant capital dollars in 1988. In 1988, it received \$8.5 million; in 1989, \$11.6 million. These levels have increased and in the FY '93 budget, the project is recommended for \$15.2 million. In addition, there have been state, local and private dollars invested in various projects for tourists, museums, historic restoration and recreation, bringing significant investment in the area.

The I & M Canal has a defined purpose to protect and utilize cultural and natural resources. Among its specific goals are providing protection, encouraging recreation, conserving resources, increasing awareness and restoring buildings with economic development potential. The I & M has not received the same level of capital funding as the project in Pennsylvania, but since its designation in 1984, has had \$250,000 per year in federal operating money, and has documented \$23.0 million in state and local money for resource development and historic preservation. The director has said that the one of the most important results from designation is that the various governments and organizations in the area are now working together, focused on common goals. The area is receiving national recognition, increased tourism, and joint promotion as a result of coordination.

Promotion of canals and locks is becoming increasingly important throughout the country. New York State is now promoting development along the Erie Canal, with the expressed purpose of increasing tourism. Pennsylvania has its own Heritage Parks Program, which includes river systems and tourism promotion.

6.2 The Importance of the Locks

Although the waterfront and the historic buildings in the corridor would remain if the locks were abandoned and filled, the system and the opportunities would be greatly diminished if the locks were sealed, channels filled, and navigation forever impossible along the river. Apart from any heritage designation, the locks have great value. Their importance includes:

- Preserving historic resources
- Maintaining through navigation
- Providing access to the water
- Increasing recreational potential
- Giving control to the local community
- Creating development opportunities
- Establishing visitor attractions

The locks themselves, and the lands adjacent, to them represent significant economic development opportunities and community assets, for both the resident and tourist. They are historic resources that should be preserved as part of the heritage of the area for cultural enrichment. There is value in saving and having reference to our past.

The commercial use of the river has declined, although not totally disappeared. There is still the occasional need to bring a paper dryer up the river. Work barges still move up and down the shoreline, building docks and sinking piles. Ferry boats are sometimes brought into the area. Even though most boats may not move up and down the entire system often, there is still the need to bring large pleasure boats into the lakes or out into the Great Lakes. In addition, recreational boating can be enhanced if navigation is maintained. There are large pools for small craft operation between some of the locks. But the possibility of moving from one pool to another, or to Green Bay or Lake Winnebago, increases the desirability of keeping a boat on the Fox River.

Access to the water is very important. At this time, many of the area's premier waterfront sites are fenced off and the public cannot get access to the river. There are recreational opportunities, not just for boating and launching small craft, but for hiking and even just sitting along the river.

If the Corps gives the locks and system to the local and state governments, this will mean that the community, and not the federal government will control the use, access and development of the sites.

Closing the locks would diminish the value of the waterfront, and waterfront land has great development potential. Development does not mean water-oriented development, either, for many uses only want to be adjacent to the water for aesthetic reasons.

Locks themselves have consistently drawn visitors, who come to watch boats being moved through locks. They become a tourist attraction. The operator of a tour boat along the Erie Canal in Lockport, New York says every time he goes through a lock, people gravitate to the site to watch.

6.3 Designation as a Tourism Destination

The "Fox River National Heritage Corridor" designation is important if the corridor area is to increase tourism and reap its economic benefits. As a destination region the area could have potential to capture more of its primary market, along with a larger Midwest regional market.

No one city or village in the region currently is a major subregional or regional attraction on its own. However, linked together as the Fox River Heritage Corridor and with substantial enhancements in each of the major cities, as well as some of the smaller towns, the area could become a **destination region**. The cities with the greatest potential appear to be Green Bay, Appleton and Oshkosh. All of the smaller villages and towns can participate, and each has its role to play.

The area currently has no recognizable image and a weak recreational tourism base, particularly in the urban areas. However, the individual attractions can be woven together and marketed as a region, if the heritage theme is developed.

The region is both urban and rural. The different parts can complement each other in a heritage promotion. The urban areas have the infrastructure and base populations to support tourism. They can accommodate facilities for visitors, hotels and motels, restaurants, museums, entertainment and services. The river, with its canals and locks become sites for development and recreation, both for residents and visitors. They can become base camps for excursions into the countryside.

The rural areas have much natural and man-made beauty - scenery, quaint villages, historic buildings, unique shops and access to outside recreation. This can provide choice and balance to a visitor's experience. The rural areas can benefit from proximity to population bases.

The ability to market the region as an entity, with choice and variety, will create a destination image, essential to attracting tourists. Defining, developing and marketing the Fox River Corridor as a heritage destination has many opportunities and challenges.

6.4 *The Tourism Impact of Designation*

Designation alone will not create a new tourism impact. It must be accompanied by both marketing and development. The development should include tourist facilities and services, but must include heritage projects, such as interpretive sites, visitor centers, signage, activities, and historic preservation. Heritage designation and lock preservation provide the framework for development and marketing.

As has already been pointed out, primary benefits accrue to residents of the area. A conservative estimate of the impact on tourism is that there will be an increase in recreational tourism of 10 percent over five years after designation. The increase in overnight recreational visitors to hotels and motels will be 20 percent over this period. We include no estimate of increase in business travel. Tourism development can be incremental and accomplished with activities and events even without new physical construction. The existence of base accommodations will permit this to happen in the corridor.

The projection is modest. First, the current market penetration of the primary market is 11 percent. The increase will require just over one percentage point more in penetration. Second, this is less than the increase demonstrated at the Illinois and Michigan Canal. The I & M was the first heritage corridor, and is south of the Fox River Corridor and draws from much the same market, including the Chicago area. The I & M was designated in 1984. The Heritage Corridor Visitors Bureau, which oversees marketing for the area, reported that between 1986 and 1989, attendance in the corridor increased from 4.0 to 4.5 million, an increase of 12.5 percent. Tourism has continued to grow. In 1989, five new motels opened. In 1992, hotel, motel occupancy increased 20 percent.

In the Blackstone Heritage Corridor, in Massachusetts and Rhode Island, the state park at Uxbridge has estimated an increase of 20 percent visitation. This has been the result of more events. A new visitor center has just been authorized and should result in even more attendance.

A 20 percent increase in pleasure visitors to motels and motels will result in an additional 100,000 guests yearly. If the average occupancy is 1.8 persons, staying 2.0 nights, this results in 110,000 more room nights. These nights are enough to add about 450 rooms to the lodging inventory.

An increase in 10 percent other pleasure visitation will generate additional spending for restaurants, shops, amusements, entertainment, sports, museums, and other commercial activity. If lodging costs are excluded, additional spending here would generate \$26.6 million, and result in 90,000 to 120,000 square feet of commercial and attraction expansion.

Increased Tourism Spending

	Lodging	Other
Hotel, motel guests	\$4.4 million	\$8.2 million
Camping	.8 million	5.0 million
Visiting friends, kin	-	10.1 million
Day trips	-	3.3 million
Total increased spending:		\$31.8 million
Indirect spending (multiplier)		\$42.0 million
Total spending impact		\$73.8 million

From the modest increase in recreational visitation, \$31.8 million in additional spending will occur, inducing another \$42.0 million, for a total impact of \$73.8 million.

This is additional money that would come into the community from increased pleasure travel which could be induced by heritage designation and development.

7.0 Development Opportunities

The Fox River Corridor is a great resource. There are numerous opportunities for development throughout the length of the river. Some opportunities exist with or without the designation, some without the locks. However, the maximum potential for realization of recreational, preservation, and economic benefit will come from a unified approach to the corridor, best achieved through regional cooperation and coordination.

The most significant opportunities will be realized in the urban areas, particularly in the Lower Fox areas of Brown and Outagamie Counties. The more rural areas will realize benefits primarily from spin-offs from the more developed areas. On their own, these areas have less drawing power, but would prosper from an enhanced image, destination marketing, and more visitors to the region as a whole.

This part of the report will review the potential development uses, the major development opportunity sites, an illustrative development site plan for an area outside Oshkosh, and the potential uses of the locks themselves. It focuses on the Lower Fox area.

7.1 The Potential Uses

There are a variety of uses which have potential along the waterfront. These are primarily:

- Recreation. Opportunities for hiking, nature appreciation, passive and active use, and increased access to the waterfront are a paramount opportunity.
- Boating. Marinas, boat launches and rental boats in the areas adjacent to pools are much needed in the area.
- Tour boats, ferries, cruises. There are few opportunities for people to take a trip on the river at this time.
- Restaurants. For the most part, restaurants either along or overlooking the water are sparse.

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- Campgrounds. There could profitably be sites for RV's and tents along there river.
 - Commercial recreation. Businesses could be developed to provide bikes, snowmobiles, horseback riding, cross-country skiing, and other participatory sports.
 - Housing. Although some housing overlooks the river, riverfront housing is just beginning to be developed, as at De Pere and Lincoln Mills.
 - Shopping. Some specialty, craft, antique and marketplace shopping would be desirable as has been demonstrated in many cities around the country.
 - Attractions. Visitor attractions, such as museums, interpretive centers, and historic displays would be valuable additions, and essential for heritage promotion.
 - Offices. The riverfront would be a desirable locations for some professional offices.
 - Hotels. Although most sites are not convenient to "downtowns", in selected locations, some lodging may be feasible.

Specific uses must depend upon the characteristics of individual sites and their relationship to other development in the general location. Sites which are currently isolated are more appropriate for less commercial uses.

Providing market justification for the development opportunities was not a part of this assignment. However, some overall observations about market are included here. First, the market for these uses will come from increased tourism, from new opportunities not now present in the area (like riverfront housing), and from demand for additional recreational and cultural experiences. The opportunities are both urban and rural.

As shown in the previous section of this report, the increase in tourism could generate 450 additional hotel, motel rooms and from 90,000-120,000 square feet of retail, restaurant, attraction and entertainment space.

Housing along the river is a new opportunity. From population projections, it can be estimated that between 23,500 and 25,000 additional housing units will be needed between 1990-2000 in the nine county area.

Certainly, a portion of these would be successful on the water. A modest five percent of the demand would create a market for about 1,200 units.

One of the most underserved markets in the area is for boating. Residents in the nine county area own 73,000 boats (excluding fleets) or one for every 9.6 people or every 3.5 households. There are very limited opportunities to use these boats in the area. There are few marinas and boat ramps. In the Lower Fox, residents own 9,500 sail or inboard motor boats which could use marinas. There are only about 1,500-1,600 slips in the area, or one for every six of these boats. If access were provided, there are several pool areas in the river, suitable for small craft operations.

The need for recreation is best noted in the latest Statewide Comprehensive Outdoor Recreation Plan (SCORP) for 1991-1996. It placed very high priority on protecting and developing river recreation, including the urban areas, and development of an expanded trail program.

7.2 Identification of Development Opportunity Sites

After reviewing the waterfront, a preliminary list of the most important sites has been completed. These sites have obvious potential. Some have the potential for immediate development and as such, should be given special priority. All would be enhanced by the heritage designation. One of these sites has been selected for concept planning, presented later in this section of the report. Opportunity sites include:

- **Vacant/Underutilized Riverfront Land in Downtown Green Bay** -- The City of Green Bay, through its Planning Department has prepared plans for a number of sites to encourage private reinvestment. This is a very positive effort and contributes to the overall enhancement of the Fox River Corridor.
- **Heritage Hill Riverfront Expansion** -- This area is part of the State park and represents an opportunity to provide public access to the river, primarily in a passive natural way, to further appreciation of the area's beauty, resources and history.

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- **40-acre Site Adjacent to U.S. Paper in De Pere** -- This large site, fronting on the river, across from De Pere, has good potential for development. If combined with the adjacent fairgrounds site that is rumored to be on the market, it creates a major property that might be suitable for a carefully planned industrial/office/research park.
 - **Riverview Site in Little Chute** -- The old nine acre sanitarium site is strategically located next to a potential park site and the river. It is already being considered for housing development and is a clear demonstration of the value of good sites adjacent to the river.
 - **Peabody Park Site in Appleton** -- This publicly-owned property has potential for improvement as a riverfront park. Its location, diagonally across the Fox River from the Newberry Street site, provides an attractive backdrop for more intensive mixed-use development on that site.
 - **Newberry Street/Lock #4/Telulah Park Site in Appleton** -- This site represents an opportunity to expand public access and recreation to the riverfront. It also can support private development, primarily for residents, once the employment at the site no longer remains. Of the lock sites in Appleton, this has the easiest access.
 - **Atlas and Vulcan Sites on the Upper Flats in Appleton** -- Upstream from the Newberry Street site and on the opposite shore of the river are the Atlas and Vulcan sites with their historic buildings and excellent views of the river. These sites, though limited in size, have potential for adaptive reuse of the historic buildings for residential and public attraction uses.
 - **Institute of Paper Chemistry Site in Appleton** -- While not directly on the river, this important site and its campus-like setting and attractive buildings are a major opportunity. An educational or research-based tenant for this property would be a major enhancement to the City of Appleton and to the area.
 - **"Bluff Site" in Appleton** -- This rather difficult site is located in the area where the Valley Bank and Michiel's Restaurant and their parking are located. This is one of the few areas where, through creative planning and development, downtown Appleton could be brought more directly to the river.

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- **Vacant/Underutilized Riverfront Sites in Downtown Oshkosh** -- Like Green Bay, the City of Oshkosh has initiated a substantial amount of planning for its downtown riverfront area. A riverfront walk and several important development opportunity sites are currently being planned. This type of development reinforces Oshkosh as an anchor city.
 - **Site West of Oshkosh along U.S. Route 41 at Routes 110** -- This is a priority site for which more detailed conceptual planning and design is illustrated. The idea here is to utilize this strategic location for a new region (and state) serving visitor and nature center, with a waterfront wetlands, and trails; access to a major trail; and commercial development, i.e., gas station, hotel, restaurant, retail, camping and a recreation rental complex.
 - **Portage** -- Although the focus here is on the Lower Fox, the development now being studied in Portage would be an enhancement to the heritage theme. Revitalizing the downtown, with canal restoration, can provide an important link to the more rural areas and an important visitor destination within the system.

7.3 Site Concept Plan: Oshkosh

A site near Oshkosh was selected by staff of the East Central Wisconsin Regional Planning Commission for illustration of the development potential and opportunity within the Fox River Corridor. The site is oriented to use by both tourists and residents in the region. As specified by ECWRPC, the site was planned without regard to current ownership and building, but with realistic utilization of the land with respect to use, market, location, site characteristics and design standards.

This site is just west of the City of Oshkosh at the interchange of U.S. Route 41 and State 110. It is a large site, adjacent to Lake Butte des Morts and largely undeveloped. A new interchange is being designed for the site, and State 110, north of the new interchange will become U.S. 45 and be upgraded to four lanes, divided. The route up 41 and 45 will provide major access from Milwaukee and Chicago to northern recreational areas, and represents an opportunity to attract visitors going north. It also is easily accessible to local residents.

The site has some storage and warehouses, some housing adjacent to the lake, extensive wetlands (Allen Marsh), some ownership by the University of Wisconsin and little opportunity for boating access because of the wetlands. It includes the trailhead for an abandoned railroad right-of-way that is used

for hiking, biking, horseback riding and snowmobiling (but no ATV's). A trail link into Oshkosh is being planned.

The site is very visible from the southern approach, and with proper signage can intercept travelers as they go north on 41 or use the interchange. The site is a good location to provide an interpretive experience, a nature center, access to recreation associated with the trail, and could introduce visitors (both tourists and residents) to the nature and ecology of the marsh and to the heritage of the Fox River, including the canals and locks. The interchange is a valuable commercial location for travel-related services.

The plan provides access to a nature/heritage center and recreational areas while accommodating commercial uses. The service areas are provided, but screened to protect the visual access to the center.

The concept plan includes:

- A nature, heritage center with interpretive exhibits, visitor information, and extensive trails and boardwalks through the wetlands
- A camping area for tents and backpackers
- Trailhead parking
- A commercial recreation center for rental of bikes, snowmobiles, skis and horses
- An RV park

The travel-related retail area includes:

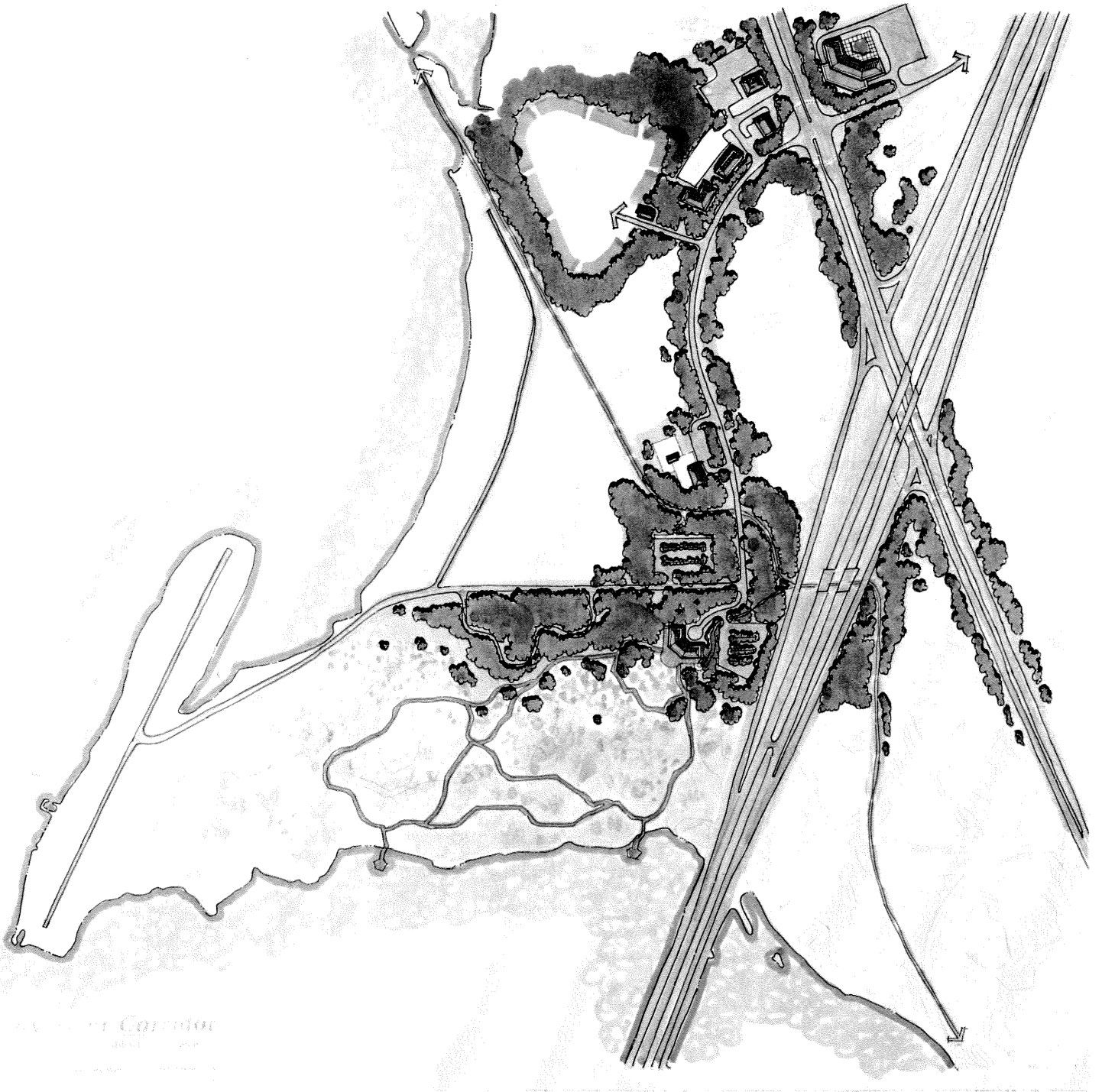
- A motel
- A restaurant
- Gas station
- Service retail, shops, convenience goods

The program with associated values is summarized in Table 18, and the site plan presented in Exhibit #2.

Table 15.
Development Program

Oshkosh Opportunity Site

Use	Size	Value
Nature/Heritage Center	11,000 sf	\$1.3 million
Recreation Rental	5,000 sf	\$600,000
RV Park	40 pads	\$800,000
Motel	100 rooms	\$4.0-\$5.0 million
Restaurant	4,000 sf	\$600,000
Gas Station		\$1.0 million
Service Retail	13,500 sf	\$1.6 million
Park, trails, boardwalk, road, landscaping, tent grounds		\$1.8 million



Oshkosh Opportunity Site
Site Plan

7.4 The Locks and Corps Property

The Corps properties, including the locks represent valuable property. Within the Lower Fox, from Menasha to Green Bay, there are 17 locks with associated canals and land. In addition, there are nine dams, and four harbors of refuge in Lake Winnebago.

Much of the riverfront is in private ownership. The locks are often strategically located and could provide valuable access to the waterfront. At this time, the locks are fenced off and do not provide public use, opportunities for boating access, or recreation. If the locks are transferred to the Fox River community or State, they can be used productively.

From surveys shown on the Corps maps of the locks, there are 137.4 acres of land associated with the seventeen locks, including the locks and canals. There are four canals: in Menasha, Appleton, Little Chute and Kaukauna. At this time, only Little Chute has used the lock property effectively, by using it for recreation.

In the past, there must have been development interest in the locks, because several of the Corps parcels show platted residential lots.

Although there may have been limited through navigation, when the entire system was open, there is still significant boating opportunity. Between some of the locks, there are substantial river pools for use by small boats. If the locks do open, either partially or completely, large boats can go from one pool to another, or occasionally to Lake Winnebago or Green Bay. Smaller boats can be trailered from one pool to another.

Table 16 presents a summary survey of the property and locks, describing the site, boating use, and potential development opportunities. They are an asset which the community should not lose.

In many cases, the lock property represents the major public opportunity for enjoying the river. This enjoyment is not primarily for boating, but for sight-seeing, hiking, river walks, dining, shopping, picnicking, and various other leisure activities. There are few facilities open to the public along the river and few services available.

The Fox River Corridor is a great community resource. The potential for its development is significant, and the benefits to the economic, cultural, recreational and heritage life of the area substantial. Preserving the locks and the heritage of the Fox River is a major opportunity for the community.

**Table 16.
Lock and Property Description**

Lock	Property Description	Boating Use	Potential Uses
Menasha			
Lock	2.8 acres		
	Occupied lock house residential neighborhood good access	Open lock to Lake Winnebago 5.1 miles to Appleton	Small park, boating, dock restaurant, housing
Appleton			
Lock 1	23.9 acres (total)	All locks closed	
	Canal entrance 7.3 acres abandoned lock house borders steep slope poor access	5.1 miles to Menasha	Park, recreation, community center Boat dock
Lock 2	10.26 acres		
Lock 3	0.6 mile canal old lock house borders steep slope - south borders industrial flats - north limited access canal end	Canal only	Public access recreation trail
Lock 4	6.26 acres adjacent to development site access	3.4 miles to Cedars	Combination with adjacent land: park, boating, marina, commercial, housing

Lock	Property Description	Boating Use	Potential Uses
Cedars			
Lock	3.4 acres (estimate) old lock house adjacent to open area trailer park access	Lock closed 3.4 miles to Appleton	Boating recreation possible housing adjacent
Little Chute	42.5 acres contiguous 1.2 mile canal recreational uses good housing borders canal	All locks closed	
Guard Lock	Canal entrance abandoned lock house access to Island Park good access	Canal small pool to Cedars	Recreation
Lock 2	Property includes Doyle Park Island Park	Canal small pool south of Island Park	Recreation
Upper Combined Locks Lower Combined Locks	Occupied lock house adjacent to development site recreation land available good access end of canal	1.4 miles to Kaukauna	Recreation boating, marina, adjacent to good housing site

Lock	Property Description	Boating Use	Potential Uses
Kaukauna	47.5 acres contiguous 3.0 acres dam 1.2 mile canal total north waterfront	All locks closed	
Guard Lock	Canal entrance	1.4 miles to Combined Locks	Public waterfront access potential commercial
Lock 1	Old lock house steep hill on north Thilmany Mill on south poor access	Canal only	Access to adjacent land limited
Lock 2 Lock 3	Corps. Fox River office office, maintenance buildings Thilmany Mill on south access	Canal only	Management or heritage center interpretive, visitor center
Lock 4	Across from Grignon Mansion access	Canal only	Park, recreation
Lock 5	End of canal adjacent to Quarry site access	3.6 miles to Rapid Croche	Recreation, boating, marina, adjacent housing potential

Lock	Property Description	Boating Use	Potential Uses
Wright's Town			
Rapid Croche	8.1 acres rural old lock house access	Lock closed lamprey barrier 3.6 miles to Kaukauna 6.1 miles to Little Kaukauna	Recreation boating access
Little Rapids			
Little Kaukauna	3.3 acres rural old lock house access	Open lock 6.1 miles to Rapid Croche 6.0 miles to De Pere	Small park recreation boating access
De Pere			
Lock	2.8 acres at Voyager Park occupied lock house good access	Open lock 6.0 miles to Little Kaukauna access to Green Bay	Recreation restaurant retail interpretive Site visitor's center

8.0 Strategies for Developing the Fox River Corridor

This study is not a plan for the Fox River Corridor, but an examination of the economic development opportunities that are feasible there, related to the river, a heritage designation, tourism and utilization of the locks. Several opportunities are presented representing feasible development for the corridor. The achievement of that development will not be automatic, but will require regional coordination strategies and implementation. Necessary strategies are outlined here, including completing the current federal actions necessary, establishing an organizational framework, setting some important first actions and identifying funding sources.

8.1 Federal Activities

The future of the Fox River Corridor is dependent, in part, on some federal actions. These should be completed as soon as possible in order to set the stage for the corridor's development.

First, the designation of the Fox River Heritage Corridor should be completed expeditiously. It has been passed by the U.S. Senate, and should be approved by the House of Representatives as soon as possible. This will provide the image, recognition and validity of the heritage effort and the management framework to establish the resource policies and programs for preservation and interpretation.

Second, the negotiations for acquisition of the Corps locks and property should be completed, and the State, in cooperation with local government, should assume responsibility for their maintenance and operation. This will provide State and local control of the properties and remove the threat that they may be permanently sealed and filled.

8.2 *Organizational Framework*

There are three kinds of organizational functions that are required for successful development of the Fox River Corridor. These are:

- Management and ownership of the locks and adjacent property.
- Regional coordination of planning and economic development.
- Tourism development and marketing.

The management and ownership of the locks and property has been assigned to the Fox-Winnebago Regional Management Commission which was established by the State legislature. It is a thirteen person Commission authorized to manage, operate, and restore the system for the State. It has members appointed by the Governor and each of five counties: Brown, Calumet, Fond du Lac, Outagamie and Winnebago. The staffing and local funding of the Commission have not been determined. The State is providing half of the necessary funds.

The coordination of planning and economic development has not been established. The Federal Commission established by the Congress will provide overall concept planning and guidance, but local governments will undertake specific developments and pursue economic investment. Local governments may work with State agencies, like DNR or DOD, on some projects. And agencies like DNR or the University could undertake special projects themselves. But some organization should have the specific assignment to maintain regional coordination of planning and ongoing communication among the local economic development efforts.

The ECWRPC has been doing an admirable job in supporting the effort for designation, staffing the many studies, and organizing the many activities and groups focused on the corridor and its development. However, it is not now mandated to perform a broader, permanent role of corridor economic development coordination and communication. Much of what it has done falls under its general purpose, but economic promotion of the corridor concept will require additional authority, communication and responsibility. The function is essential to the coordination and joint marketing of economic development in the entire corridor (which includes areas not part of the ECWRPC). The ECWRPC should be considered for this important assignment of providing regional corridor development coordination.

If maximum benefit from tourism is to be derived from the heritage designation, a regional tourism strategy will be needed. The corridor will need to develop, market and package a heritage attraction base with common themes, cooperative marketing, and destination image. A strong destination image is now lacking in the Fox River Corridor. At this time, there are five tourism bureaus: Green Bay CVB, Fox Cities CVB, Oshkosh CVB, Fond du Lac CVB and Green Lake County Visitors Bureau. Some umbrella organization should be established to provide coordination, communication and common marketing tools for the five existing groups. One of the CVB's could assume leadership in coordinating the heritage activities.

8.3 *Initial Actions*

In addition to pursuing heritage designation and finalization of the lock negotiations, there are some important actions that should be undertaken as soon as possible. One of the major hurdles to the corridor efforts has been the lack of enthusiasm by local governments. And the support from the general public has been reserved. Without local government and broad community backing, implementing the corridor concept and accomplishing much of the development will be difficult. The initial efforts should focus on building support and initiating tourism marketing. Recommended actions include:

1. Meeting with local county and municipal government to present the opportunities for developing the corridor and river.
2. Preparing a popular public document, such as a newspaper supplement, for broad distribution.
3. Establishing a coordinated tourism marketing framework to promote tourism throughout the corridor.
4. Expanding the hotel tax throughout the region to fund corridor tourism development and consider increasing the tax for financing efforts. (One-half percent tax on the hotel rooms would raise \$400,000 annually for promotion and/or lock management.)
5. Designing a heritage logo, signage style, and interpretive program for use within the corridor to create a unified image.

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6. Promoting a series of corridor events and activities throughout the region around heritage themes that can initiate the marketing program to tourists and residents.

8.4 *Funding Sources*

There are sources of funds and programs that can be used for developing a variety of different projects and activities.

Much of the development will be private and will depend upon the market. There are programs available that can assist and subsidize private development, if necessary. Wisconsin has the Tax Increment Financing District, and the Department of Development has myriad programs to provide assistance such as loan guarantees, interest subsidies, tax abatement, grants, and technical assistance.

The hotel room tax is, as yet, modest in the area. It can appropriately be used for tourism marketing and development (including lock management), by local governments and other organizations in support of the heritage program.

At the federal level, the Heritage Commission will have an appropriation of \$350,000 per year (for up to ten years) to finance planning and management of the corridor. There are still block grants for urban redevelopment activities, some Land and Water Conservation funds, and now funds available through ISTEA to support community projects.

The State has grant programs, such as the Urban Rivers Grant Program in DNR, and may undertake some recreational development itself in support of the corridor.

It is anticipated that most development will require only the approval and encouragement of local governments because it is economic development which adds to the tax base. Although the recreation will be publicly funded, primarily, recreation is usually popular among citizens.

The initial need is to sell the idea of the Fox River Corridor to the decision-makers in the region. Once it is initiated, it can only be highly successful.