

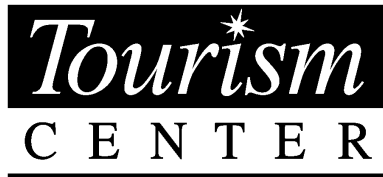
**Leech Lake Area Summer Visitor Profile:
A focus on interest in culture and nature based experiences**

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EXECUTIVE SUMMARY

According to the Travel Industry of America (TIA), a total of 24.5 million U.S. and international travelers visit Minnesota annually (Minnesota Department of Employment and Economic Development 2002). Most of those are pleasure travelers (87%) and, besides the metropolitan area, other state regions realize a rather equal share of the travel market. Thus it is critical to identify visitor's regional variation to maintain and enhance the market share, particularly given the economic importance of tourism to rural areas.

An attractive and emerging travel market are those engaged in nature-based or cultural and heritage based (Hargrove 2004; Hollinshead 1996; Luzar, Diagne, Gan, and Henning 1998; Nicholls, Vogt, and Jun 2004; TIA 2003). Based on national data, a total of 118.1 million U.S. adults participated in cultural or heritage tourism in 2002 (TIA 2003). Additionally, over three quarters (81%) of US adults took at least one trip greater than fifty miles that included at least one cultural activity or event. As an emerging market, available research is site specific and offers a limited understanding of the interest across a broader market (McIntosh 2004). Thus, the goal of this study was to profile an existing tourism market in a particular region, to assess their level of interest in cultural and nature based tourism opportunities. In particular, American Indian cultural tourism opportunities were of interest.

PURPOSE

The purpose of this project was to understand visitors to the Leech Lake area and their specific interests in culture and nature-based experiences. Specific objectives were to:

- 1) profile existing tourists in the Leech Lake area,
- 2) identify travel characteristics and expenditures in the Leech Lake area,
- 3) assess interest in nature-based and culture-based tourism among existing tourist base,
- 4) measure tourists previous engagement in culture-based tourism, and
- 5) provide insight into culture-based tourism development opportunities.

METHODS

An onsite questionnaire was administered Leech Lake area tourists in summer 2004. The methods for questionnaire administration are presented in the following sections: study setting, questionnaire, approach, response rate, and analysis.

Study Setting

The Minnesota Leech Lake Band of Ojibwe reservation boundary, located in North Central Minnesota, delimited the study area. Among these 602,889 acres, of which approximately 21,000 are tribally owned, a number of tourist attractions are housed and subsequently, tourism is a dominant economic contributor in the area (Crowley 2003). Historically, the destination area that includes over 200 lakes and the Chippewa National Forest has attracted visitors interested in fishing, boating, hiking, camping, and biking. Several communities provide services, shopping, entertainment, and accommodations for the tourist base.

Questionnaire

The University of Minnesota Tourism Center, in conjunction with the Minnesota American Indian Chamber of Commerce, Leech Lake Band of Ojibwe, and Explore Minnesota Tourism, developed a one-page questionnaire for on-site administration. The questionnaire focused on 1) travel characteristics in the Leech Lake area, 2) travel motivations, 3) interest in several cultural and nature based activities, 4) cultural tourism participation, 5) information sources used to plan the trip, and 6) demographics.

Approach

A comprehensive list of potential survey sites was identified with the assistance of various chambers: Leech Lake Area Chamber of Commerce, Leech Lake Tourism Bureau, and Cass Lake Chamber of Commerce. However, access to casinos and the National Forest visitor was not possible. A data collection schedule was designed to reach a diverse cross section of tourists, thus survey sites, times, and days were varied. Data were collected on-site for 30 days, across four periods between Memorial Day and Labor Day, 2004. Potential participants who self-identified as a tourist, and were willing to participate were provided a questionnaire.

Response Rate

A total of 769 parties were contacted, of which 544 identified themselves as tourist parties (71%). Among those tourists, a total of 506 agreed to participate (93%) and one questionnaire per household was administered.

Analysis

The completed questionnaires were entered, cleaned and checked for singularity and multi-collinearity in SPSS version 12.0. Extreme outliers were winsorized to bring highly skewed variables into usable ranges. Descriptive analysis provided means, standard deviations, and frequencies to describe the sample and provide information on variables of interest. K-means cluster analysis identified groupings by interest in culture-based tourism experiences. Analysis of variance (ANOVA) tested differences among respondents according to travel characteristics and previous cultural/historic travel. Chi-square analysis identified differences among groups when appropriate.

RESULTS

Demographics: Leech Lake area visitor respondents were mature, Anglo and possessed high educational and income status. Respondents ranged in age from eighteen to 84, with a mean age of 46.6 years. Survey respondents were primarily female (62.3 %), Caucasian (97.0 %), highly educated (40.7 % college degree, 17.1 % advanced degree), and reported an annual income greater than \$75,000 (54.9 %). Most frequently, respondents indicated either their household composition consisted of a couple with children under eighteen (49.6 %) or a couple with grown children (32.3 %).

Primary destination and reason for travel: Over half (51.7 %) of respondents indicated Leech Lake as their primary trip destination and an additional ten percent respondents indicated the city of Walker, located on the shores of Leech Lake, as their primary destination. The second most frequently cited destination among respondents was Cass Lake, (19.0 %). Similar to statewide travel data (TIA TravelScope 2002), a majority (81.0 %) of respondents cited their primary reason for travel was pleasure or recreation. Over half of the recreational visitors indicated their primary recreation activity was fishing (59.2 %), followed by visiting friends and relatives (34.3 %).

Important experience attributes: Respondents rated the importance of several experience attribute statements. The most highly rated attributes (where 5 equals very important) were “to do something with the family” ($\underline{M}=4.5$), “to get away from the usual demands of life” ($\underline{M}=4.4$), “to enjoy the scenery” ($\underline{M}=4.3$), and “to experience natural quiet” ($\underline{M}=4.1$). Attributes rated the least important were “to learn more about the local culture” ($\underline{M}=2.7$) and “to meet new people” ($\underline{M}=2.7$).

Travel Characteristics: Respondents indicated a long visitation history coupled with frequent visitation in the area. A great majority of respondents (87.3%) had previously visited the area and many of those had a long history of visiting the area: respondents, on average, had been visiting the Leech Lake area for 15.3 years. The average number of trips respondents had taken to the Leech Lake area in the previous year was 2.7. Over one third (35.2 %) had visited the area more than once in the previous year.

On average, respondents spent a total of 8.3 nights away from home. Of those nights, an average of 6.7 were spent in the Leech Lake area. A majority of respondents (74.8 %) spent between three and eight days in the Leech Lake area. Nearly ten percent (9.9 %) spent one or two days in the Leech Lake area.

Most frequently, respondents to this questionnaire stayed in resorts (63.7 %). The second most frequently cited accommodation type were motels or hotels, where slightly less than one in ten (9.1 %) respondents indicated so.

Respondents indicated relatively large travel party size, as shown by the average travel party ($\underline{M}=8.6$ people). Respondents' party size ranged from one to 48 people. However, over one third (41.9 %) indicated traveling with four or fewer people.

Average expenditures, in the previous 24-hour time period, were calculated based on respondents who reported expenditures in a particular category. Lodging was the top expenditure, where respondents reported spending an average of \$192.12. Among those who indicated expenditures at a casino, the average spent was \$65.30. Shopping was also a top expenditure category among respondents, where respondents indicated spending an average of \$61.01. Very few respondents indicated expenditures in the categories of guides/outfitting or cultural arts.

Information sources for trip planning: Of the twelve information sources provided, the most frequently noted source was the Internet (52.7 %). Other top sources of information included previous visit (40.9 %) and recommendations from friends or relatives (31.9 %).

Cultural tourism participation: Similar to TIA findings (2003), a majority of respondents in the Leech Lake area had engaged in some type of historic or cultural travel in the preceding year. Over three quarters (78.7 %) of respondents indicated participation in at least one of the fifteen TIA historical/cultural activity categories. Nearly three quarters (73.3 %) of respondents engaged in culture-based activities or events, while slightly over half (54.7 %) engaged in historic related activities. Leech Lake area respondents attendance at art museums and antique establishments were among the highest cultural tourism activities cited of the 15 choices.

Nature-based tourism and cultural tourism interest: Among the nature-based tourist experiences queried, interest in fishing had the highest rating ($\bar{M}=4.0$). Respondents indicated moderate interest in wildlife viewing and nature photography ($\bar{M}=3.7$ and $\bar{M}=3.2$, respectively). Specific activities, such as fish hatchery tours, wild rice processing tours, and Winnie Ponds Fish and Wildlife Management self-guided tours garnered lower interest levels among respondents. On average, respondents were least interested in hunting ($\bar{M}=2.6$).

Interest in several existent or potential culture-based tourist experiences was queried. On average, respondents indicated low to moderate level of interest across all six experiences. The items that had the highest percentage of interested respondents were traditional Native American dance performances, tribal gift shops, and Native American cultural heritage history center.

Differences among respondents: Respondents were segmented to better understand their patterns and needs. The two segmentation methods used were engagement in cultural/historic travel and interest in culture-based tourism. When segmented by level of engagement in cultural/historic travel, significant differences in interest emerged, not surprisingly. Specifically, as the level of previous engagement in cultural or historic tourism increased, the level of interest in cultural-based tourism experiences increased.

When segmented by cluster analysis, four groups emerged: low, passive moderates, active moderates, and high interest. As their name suggests, interest level increased within the clusters and significantly differentiated them. Information and travel patterns were also differentiated within the clusters. Passive and high interest groups used local and state tourism information significantly more than the other groups. High interest groups had smaller travel parties and longer area visitation histories than the other groups.

DISCUSSION

Prior to any discussion, we acknowledge that successful tourism development depends on accurate community and tribal assessments of attitudes toward that development. While it remains important to understand the desires and interests of tourists, it is imperative to also determine what aspects of a culture (i.e. practices, traditions, and beliefs) can be shared,

transferred, or presented. This type of information can and should be obtained from the tribal members themselves.

Respondents: Leech Lake area visitor respondents were mature, Anglo and possessed high educational and income status. These visitors reflect the nature and culture based tourism market that, compared to other travelers, is older, more likely to be retired, more affluent, and more educated (TIA 2003).

In terms of stay and expenditures, Leech Lake area respondents indicated a longer stay (6.7 nights vs 3 nights, respectively; Minnesota Department of Employment and Economic Development 2002) than the typical Minnesota traveler. This is, in a large part, attributed to the proportion of respondents staying in resorts. Recent research on the resort market indicates that the baby boomers will remain the key component (Goodman 1994). However, this 'boomer' also has specific desires for novelty (National Travel Monitor 1998), family accommodations (Chon and Singh 1995), as well as flexible resort opportunities: educational, cultural, or sport experiences (Cato and Knustler 1988). Thus, the boomers are appealing base for cultural tourism development.

Information sources for trip planning: Following national and state trends, travel planning continues to be increasingly reliant on the Internet. Leech Lake area visitors are online and mirror the use of other travelers in their use of the Internet to plan and book travel. Subsequently, ensuring current and interesting web pages represent the area is critical. Further exploration of exactly what resources visitors are using on the Internet would be helpful for advertising as well as to clarify if, in fact, visitors are using information on the Internet provided by the local tourism organizations. In addition to the Internet, previous experiences and word of mouth via friends and families remain important information sources for trip planning.

Fortunately, the information sources most used by cultural travelers are the same as those used by the current Leech Lake visitor base: Internet (TIA 2003), word of mouth (TIA 2003; Prideaux and Kininmont 1999), and friends and family (Prideaux and Kininmont 1999). However, as both passive and interested cultural/historic travelers used local and state information sources more than the other cluster groups, accurate and interesting information at these venues is encouraged.

Engagement and interest in nature based tourism: While the majority of pleasure travelers were there to fish, another nature based activity of interest among them is wildlife viewing. Specific to wildlife viewing, Minnesota ranked second in participation behind Vermont in the 2000 national survey of wildlife related recreation (USFWS 2002). Beyond attention to the wildlife viewing experience itself, a combination of additional nature based activities and cultural/historic opportunities are likely to enhance experiences and extend wildlife viewing trips and vice versa. Therefore, marketing and partnering with local area attractions is suggested.

Given the majority of current recreational visitors are there to fish, further consideration of a fish hatchery tour seems logical. Inclusion of both historical and cultural elements within the tour can emphasize the educational aspect of the tour and subsequently, may qualify for grant monies for development.

Engagement and interest in culture based tourism: Like the traveling U.S. population, Leech Lake area visitors have a range of experiences in recent cultural/historic event participation while traveling. When asked to consider interest for such opportunities in the Leech Lake area, summer 2004 tourists were largely unsure of their interest. Similar to past research (Moscardo and Pearce 1999), four levels of interest in cultural tourism emerged. Initial product and program development should focus in on the twenty percent of respondents who expressed interest in cultural-based tourism opportunities.

Based on respondent interest and previous cultural travel engagement, developing attractions and/or programs based in American Indian art and related product seems prudent. Most cultural travelers participate in more than one cultural activity, attraction, or destination during their trip (Zeppel 2002) and therefore, it is important to have a package of opportunities to consider. Interactive educational opportunities with observation available are an obvious draw. Further, the broad interest in gift shops among all respondents to this questionnaire, coupled with their spending on gifts, suggests that a gift shop should definitely be apart of whatever offering emerges. Given the extensive use history among respondents, learning more about their attachment to the Leech Lake area may assist with program and product development. Framing some of the programming and tourism products using a common place that both the tribe and visitors care about may prove a useful marketing strategy as well as a way to ease the stress of cultural tourism on the tribe.

FUTURE RESEARCH

This project was the first attempt to investigate the level of interest in culture-based tourism, particularly American Indian tourism opportunities, in Minnesota. Given that it is a snapshot view of a particular tribal area within the state, additional information could enhance statewide cultural tourism efforts. Further, monitoring level of interest in various tourism experience opportunities is suggested.

Just as it is important to understand the current tourism market base, it is equally important to assess community and tribal support for tourism development. This could be achieved through in-depth interviews among key players in the community, or alternatively conduct a tourism impact assessment, using the tourism impact assessment scale developed by Lankford (1994).

The uncertainty of the current market about future culture tourism opportunities suggests product expectations and preferences are not yet set. By obtaining detailed knowledge of consumer expectations and preferences, the tribe can choose among the potential projects those that celebrate the culture, while protecting those that may impede on its sacredness.

As nature and cultural tourism opportunities are considered, identifying their important elements and how the tribe performs on providing those elements will be critical. Therefore, importance-performance analysis is suggested.

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INTRODUCTION

According to the Travel Industry of America (TIA), a total of 24.5 million U.S. and International travelers visit Minnesota annually (Minnesota Department of Employment and Economic Development 2002). Nearly nine out of ten (87 %) of those are pleasure travelers. While almost one half (44 %) travel to the metropolitan area, other regions throughout the state realized a rather equal share of the travel market. Thus it is critical to understand the regional variation to maintain and enhance the market share. Understanding the existing travel market is imperative to continue to captivate and enhance a tourist base, particularly given the economic importance of tourism to rural areas.

However, relatively little information about travelers within Minnesota regions is available. For example, according to TIA, the North Central/West region is the primary destination among 22 % of the state travel market. Often the only regionally specific information available is drawn from specific destinations within the region, such as Federal or State forests and parks (USDA FS 2002; MNDNR 2002). For instance, in the North Central region, the USFS estimates over 2.2 million people visit the Chippewa National Forest annually (USDA FS 2002). While this information is useful, it does not capture the breadth of characteristics, activities, experiences, and desires of area travelers.

An attractive and emerging travel market are those engaged in nature-based or cultural and heritage based (Hargrove 2004; Hollinshead 1996; Luzar, Diagne, Gan, and Henning 1998; Nicholls, Vogt, and Jun 2004; TIA 2003). Cultural or heritage based tourism is the fastest growing U.S. leisure travel segment (Nicholls, et al. 2004) and there was a 13% increase in historical and cultural tourism from 1996 to 2002 (TIA 2003). TIA defines a cultural/historic tourist as someone who engages in cultural, arts, historic or heritage based activities or events. TIA delineated these events into fifteen categories and used them in a major study among U.S. travelers (2003). Based on their data, they estimate that a total of 118.1 million U.S. adults participated in cultural or heritage tourism in 2002 and comprised of 216.8 million cultural or historic trips fifty or more miles one way (TIA 2003). Additionally, over three quarters (81 %) of US adults took at least one trip greater than fifty miles that included at least one cultural activity or event. The literature on cultural or heritage tourists reports that tourists tend to be middle aged or older and possess above average levels of education and income (TIA 2003; Prideaux and Kininmont 1999; Kerstetter, Confer, and Graefe 2001). Additionally, cultural or heritage tourists stay longer and spend more in the host destination (TIA 2003; Hargrove 2002).

Similarly, nature-based tourism is a rapidly growing market. While travel for natural attractions and experiences has a rich history, Travel Industry Association of America (2004): recently investigated this group and provided a new nomenclature: geotourists. One-third of all the traveling public is geotourists, those who are primarily concerned with preserving both the natural and human attributes of a site seeking a travel experience that is educational, focused on nature, culture, history and components of most heritage offerings. Within the geotourism sector there are three distinct groups: geo savvies, urban sophisticates, and good citizens. All three groups found a travel experience to be better if the site has preserved the natural, cultural, and historical aspects.

Available research focuses on tourists engaged in cultural tourism at particular attractions or sites and offers a limited understanding of the interest across a broader market (McIntosh 2004). Thus, the goal of this study was to profile an existing tourism market, in a particular region of the state, and assess their level of interest in cultural and nature based tourism opportunities.

STUDY PURPOSE

The purpose of this project was to understand visitors to the Leech Lake area and their specific interests in culture and nature-based experiences. Specific objectives were to:

- 1) profile existing tourists in the Leech Lake area,
- 2) identify travel characteristics and expenditures in the Leech Lake area,
- 3) assess interest in nature-based and culture-based tourism among the existing tourist base,
- 4) measure tourists previous engagement in culture-based tourism, and
- 5) provide insight into culture-based tourism development opportunities.

METHODS

An onsite questionnaire was administered to tourists in the Leech Lake area summer 2004. The methods for on-site questionnaire administration are presented in the following sections: study setting, questionnaire, approach, response rate, and analysis.

Study Setting

The Minnesota Leech Lake Band of Ojibwe reservation boundary, located in North Central Minnesota, was the study area. The Leech Lake reservation boundary encompasses 602,889 acres, of which approximately 21,000 are tribally owned. Current tribal infrastructure provides limited opportunities for tourists, but includes three casinos and a small gift shop that is adjacent to a tribally owned gas station. As access to casino visitors was not available, sampling expanded beyond tribally-owned tourist destinations.

Tourism is a dominant economic contributor to the area. The Leech Lake area possesses over 200 lakes, including Leech Lake, the third largest lake in Minnesota. Also within the region is the Chippewa National Forest, offering an array of recreational activities. There are also numerous paved biking trails, including the Paul Bunyan Trail and the Heartland Trail, offering over 75 miles of scenic rides. Several communities in the area provide services, shopping, entertainment, and accommodations.

Questionnaire

The University of Minnesota Tourism Center, in conjunction with the Minnesota American Indian Chamber of Commerce, the Leech Lake Band of Ojibwe, and Explore Minnesota Tourism, developed an on-site questionnaire. Questionnaire sections focused on 1) travel characteristics, 2) motivations for travel, 3) interest in several cultural and nature based activities,

4) cultural tourism participation, 5) information sources used to plan trip, and 6) demographics (Appendix A).

Travel characteristics

The questionnaire included several questions to ascertain visitors travel characteristics. First, respondents indicated their primary destination and primary reason for their trip among several response categories. Experience use history was determined through number of trips in the previous year, the number of years visiting the Leech Lake area, and the first year they visited the area. Additionally, several open-ended questions focused on their actual trip. Questions included the total number of nights away from home, total number of nights in the Leech Lake area, and group size. For excursionists, the number of hours in the Leech Lake area was queried, as was the inclusion of any international visitors in their travel group. For overnight visitors accommodation type was queried.

All visitors were asked to estimate their expenditures in the previous 24-hour time period. Personal expenditures in several categories was assessed: lodging, restaurant food/beverages, groceries, transportation, shopping, cultural arts, recreation/ attractions/entertainment, guides/outfitting, and casino gaming.

Motivations for travel

Eleven potential travel motivations were presented and respondents indicated how important each experience was on a five point scale, where one equaled very unimportant and five equaled very important. Statement examples include 'to do something with the family', 'to enjoy the scenery', 'to get away from the usual demands of life', and 'to learn about the cultural history of the area'.

Interest in cultural and nature based activities

In an effort to understand interest in cultural and nature-based activities, a list of thirteen existent or potential opportunities in these areas was presented. Respondents indicated their level of interest on a five point scale, where one equaled very uninterested and five equaled very interested. Culture-based examples included 'traditional Native American dance performances', 'tours put on by an American Indian tribe', and 'tribal gift shops'. Nature-based activities included broad categories, such as 'fishing' or 'wildlife viewing', as well as specific opportunities found in the Leech Lake area. Examples include 'Winnie Ponds Fish and Wildlife Management self-guided tour' and 'wild rice processing plant tours'.

Cultural tourism participation

To delineate participation in cultural tourism, respondents indicated if they had participated in any of fifteen cultural/historic activities and events while on vacation in the previous year (following TIA 2003). Categories included 'designated historic site', 'live theater performance', 'ethnic culture exhibit or center', and 'art museum or gallery'.

Information sources used to plan trip

Respondents indicated any and all information sources used to plan their trip. The twelve information sources included 'Internet', 'area tourism information (CVB, Chamber)', 'previous visit', and 'recommendation from friend/relative'.

Demographics

Finally, for descriptive purposes, basic demographic information questions were included. These ten questions included gender (male or female), age via year of birth, education level (eighth grade through advanced degree), ethnicity (Hispanic or not), race, annual household income (\$5,000 or less through \$125,000 or more), household composition (ranging from couple with children under 18 through single with no children), tribal affiliation (U.S. and Canada), and zip code.

Approach

A comprehensive list of potential survey sites was identified with the assistance of Leech Lake Area Chamber of Commerce, Leech Lake Tourism Bureau, and Cass Lake Chamber of Commerce. A data collection schedule was designed to reach a diverse cross section of tourists, thus survey sites, times, and days were varied to reach this broad aim. Data were collected on-site for 30 days, across four periods between Memorial Day and Labor Day, 2004. Potential participants who self-identified as a tourist and were willing to participate were provided a questionnaire.

Respondents were intercepted at various locales in the Leech Lake area. A majority of respondents (71.9 %) were intercepted at accommodations, which included resorts, hotels, and campgrounds or RV parks (Figure 1). An additional quarter of respondents were intercepted at restaurants and area attractions (14.2 and 10.3 %, respectively). Special events and retail establishments garnered the least amount of respondents. A full listing of intercept sites can be found in Appendix C.

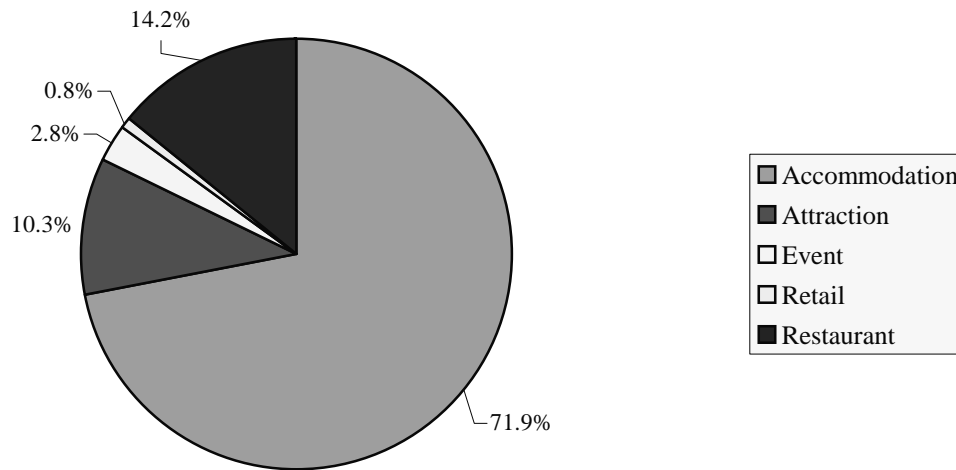


Figure 1. Respondent intercept locales for Leech Lake area visitor profile respondents, 2004 (n=506).

Response Rate

A total of 769 parties were contacted, of which 544 identified themselves as tourist parties (71 %). Among those tourists, a total of 506 agreed to participate (93 %) and one questionnaire per household was administered.

Table 1. Response rate among Leech Lake area visitor profile respondents, 2004.

| | N |
|-------------------------|------------|
| Total Parties Contacted | 769 |
| Residents | 225 |
| Respondents | 506 |
| Refusals | 36 |
| Unusable | 2 |

Analysis

The completed questionnaires were entered, cleaned and checked for singularity and multi-collinearity in SPSS version 12.0. Extreme outliers were windsorized to bring highly skewed variables into usable ranges. Descriptive analysis provided means, standard deviations, and frequencies to describe the sample and provide information on variables of interest. K-means cluster analysis identified groupings by interest in culture-based tourism experiences. Analysis of variance (ANOVA) tested differences among respondents according to travel characteristics and previous cultural/historic travel. Chi-square analysis identified differences among groups when appropriate.

RESULTS

Respondents

Demographic profile

Leech Lake area visitor respondents were mature, Anglo and possessed high educational and income status. Respondents ranged in age from eighteen to 84, with a mean age of 46.6 years (Table 2). Survey respondents were primarily female (62.3 %), Caucasian (97.0 %), highly educated (40.7 % college degree, 17.1 % advanced degree), and reported an annual income greater than \$75,000 (54.9 %). Most frequently, respondents indicated their household composition consisted of either a couple with children under eighteen (49.6 %) or a couple with grown children (32.3 %). Very few respondents indicated they were enrolled in a U.S. Federally recognized tribe (1.0 %) or a Canadian Treaty enrolled member (0.2 %).

Table 2. Demographic characteristics among Leech Lake area visitor profile respondents, 2004.

| | Frequency | % |
|---|------------------|----------|
| Gender (n=499) | | |
| Male | 188 | 37.7 |
| Female | 311 | 62.3 |
| Age (n=490; M=46.6) | | |
| 18-25 years | 17 | 3.5 |
| 26-35 years | 68 | 13.8 |
| 36-45 years | 161 | 36.4 |
| 46-55 years | 135 | 27.6 |
| 56-65 years | 68 | 13.8 |
| 66-75 years | 32 | 6.6 |
| 76 or older | 9 | 1.8 |
| Ethnicity (n=396) | | |
| Hispanic | 4 | 1.0 |
| Non-hispanic | 392 | 99.0 |
| Race (n=493) | | |
| American Indian or Alaska Native | 7 | 1.4 |
| Asian | 1 | 0.2 |
| Black or African American | 3 | 0.6 |
| Native Hawaiian or other Pacific Islander | 1 | 0.2 |
| White | 478 | 97.0 |
| Other | 3 | 0.6 |
| Household composition (n=498) | | |
| Couple (children under 18) | 247 | 49.6 |
| Couple (grown children) | 161 | 32.3 |
| Couple (no children) | 35 | 7.0 |
| Single (children under 18) | 14 | 2.8 |
| Single (grown children) | 8 | 1.6 |
| Single (no children) | 12 | 2.4 |
| Other | 21 | 4.2 |
| Household income (n=448) | | |
| Less than \$5,000 | 4 | 0.9 |
| \$5,000-9,999 | 1 | 0.2 |
| \$10,000-14,999 | 0 | N/A |
| \$15,000-24,999 | 9 | 2.0 |
| \$25,000-34,999 | 13 | 2.9 |
| \$35,000-49,999 | 56 | 12.5 |
| \$50,000-74,999 | 119 | 26.6 |
| \$75,000-99,999 | 110 | 24.6 |
| \$100,000-124,999 | 57 | 12.7 |
| \$125,000 or more | 79 | 17.6 |
| Education level (n=496) | | |
| Eighth grade | 1 | 0.2 |
| High school/GED | 85 | 17.1 |
| Tech School | 50 | 10.1 |
| Some college | 73 | 14.7 |
| College degree | 202 | 40.7 |
| Advanced degree | 85 | 17.1 |

Visitor primary residence

Although visitors' originated from various areas throughout the country (Figure 2), Leech Lake is primarily a regional destination. Using Walker, Minnesota as a central destination point, over half (52%) of visitors to the Leech Lake traveled between 101-200 miles, one-way (Figure 3). An additional quarter (26%) of respondents traveled more than 300 miles, one-way. Clusters of respondents appear to have traveled from within the state (particularly the metropolitan region), as well as Iowa, Illinois, and North Dakota.

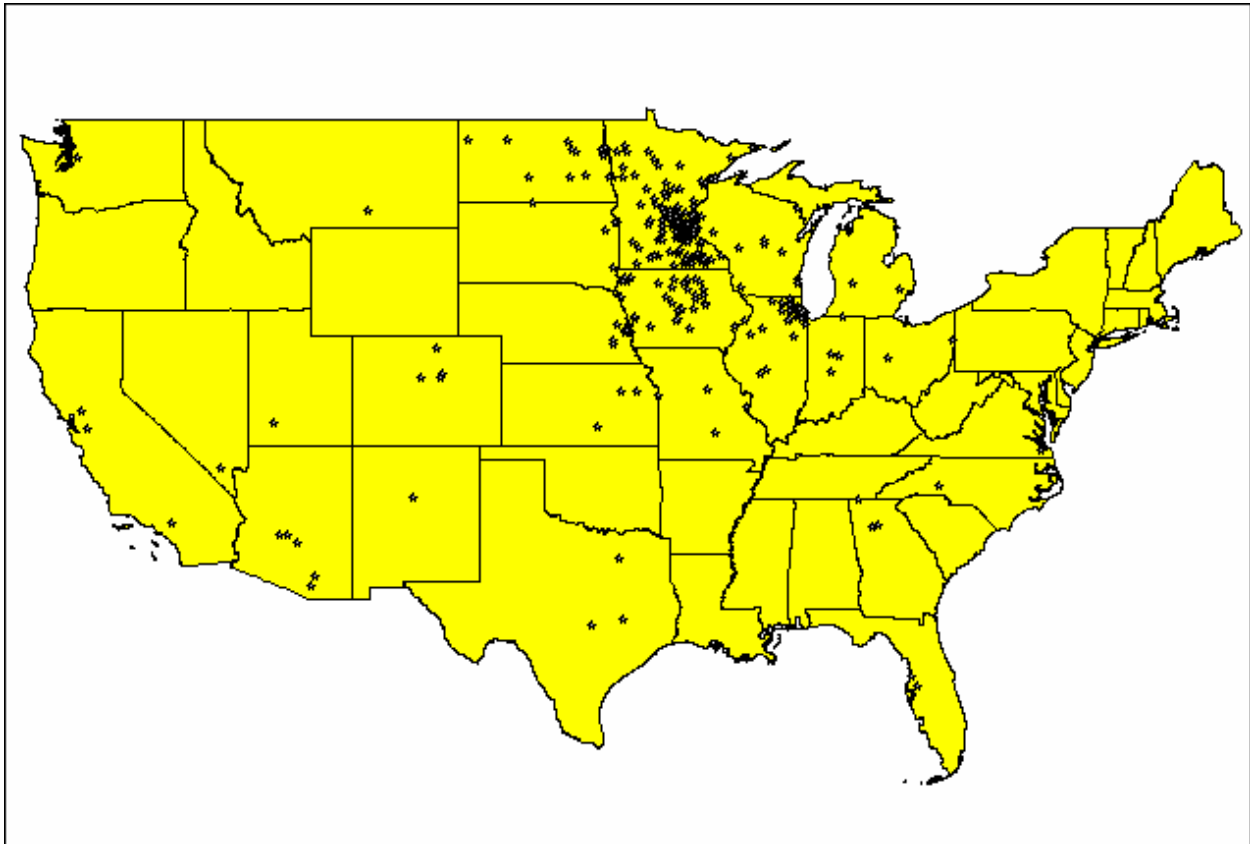


Figure 2. Primary residence of Leech Lake area visitor profile respondents, 2004.

Primary destination and reason for travel

Over one half (51.7%) of respondents indicated Leech Lake as their primary trip destination (Table 3). An additional 10.8 % of respondents indicated the city of Walker, located on the shores of Leech Lake, as their primary destination. The second most frequently cited destination among respondents was Cass Lake (19.0%). Further, more than a tenth (14.8%) cited other destinations such as other area lakes or towns, such as Hackensack.

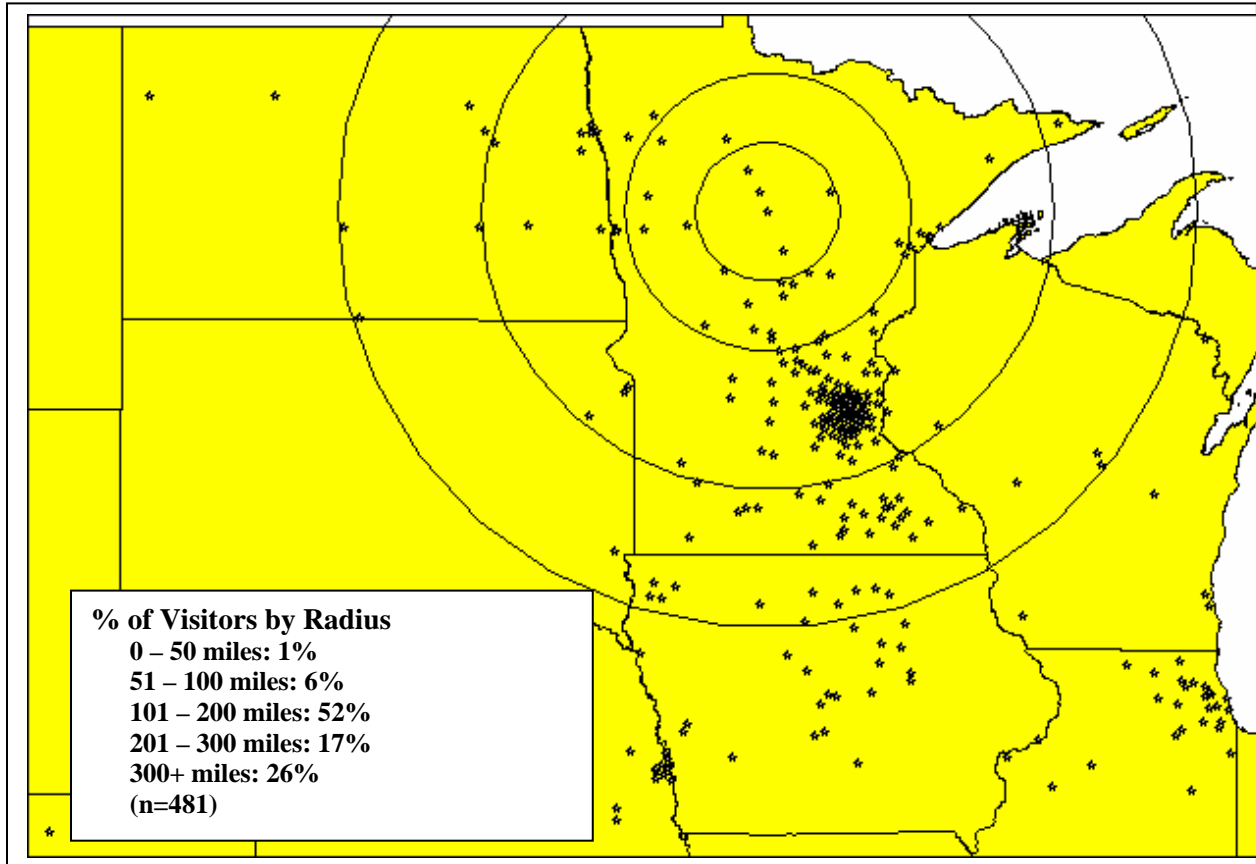


Figure 3. Regional perspective of primary residence among Leech Lake area visitor profile respondents, 2004.

Table 3. Primary destination of Leech Lake area visitor profile respondents, 2004.

| | Frequency | % |
|------------------|------------------|----------|
| Leech Lake | 259 | 51.7 |
| Cass Lake | 95 | 19.0 |
| Other | 74 | 14.8 |
| Walker | 54 | 10.8 |
| Lake Winnibigosh | 11 | 2.2 |
| Bemidji | 7 | 1.4 |
| Deer River | 1 | 0.2 |
| Total | 501 | 100.0 |

Similar to statewide travel data (TIA TravelScope 2002), pleasure or recreation was cited as the primary reason for travel among a majority of respondents (81.0%; Table 4). Of recreational tourists, more than half (59.2%) indicated their primary recreation activity was fishing, followed by visiting friends and relatives (34.3%). About ten percent cited visiting their second home as the primary reason for their trip. Very few respondents indicated business or just passing through as the primary reason for their trip.

Table 4. Primary reason for visitation among Leech Lake area visitor profile respondents, 2004.

| | Frequency | % |
|--------------------------------|------------------|----------|
| Pleasure or recreation | 409 | 81.0 |
| Own a vacation home | 48 | 9.5 |
| Other | 33 | 6.5 |
| Combined business and pleasure | 9 | 1.8 |
| Business | 3 | 0.6 |
| Just passing through | 3 | 0.6 |
| Total | 505 | 100.0 |

Important experience attributes

Four experience attributes were important to respondents: “to do something with the family” (\underline{M} =4.5), “to get away from the usual demands of life” (\underline{M} =4.4), “to enjoy the scenery” (\underline{M} =4.3), and “to experience natural quiet” (\underline{M} =4.1; Table 5). Moderate importance was found among nature-based attributes and included “to be close to nature” (\underline{M} =3.9), “to view wildlife” (\underline{M} =3.6), “to experience solitude” (\underline{M} =3.5), and “to learn about nature” (\underline{M} =3.6). Attributes least important were “to learn about the cultural history of the area” (\underline{M} =2.8), “to learn more about the local culture” (\underline{M} =2.7) and “to meet new people” (\underline{M} =2.7).

Table 5. Motivations for travel to the Leech Lake area among Leech Lake area visitor profile respondents, 2004.

| Experience | \underline{M}¹ | S.D. |
|---|---|-------------|
| To do something with the family (n=502) | 4.5 | 0.8 |
| To get away from the usual demands of life (n=500) | 4.4 | 0.8 |
| To enjoy the scenery (n=500) | 4.3 | 0.8 |
| To experience natural quiet (n=493) | 4.1 | 0.9 |
| To be close to nature (n=500) | 3.9 | 0.9 |
| To view wildlife (n=488) | 3.6 | 0.9 |
| To experience solitude (n=495) | 3.5 | 1.1 |
| To learn more about nature (n=496) | 3.0 | 0.9 |
| To learn about the cultural history of the area (n=497) | 2.8 | 0.9 |
| To learn more about the local culture (n=498) | 2.7 | 0.9 |
| To meet new people (n=487) | 2.7 | 1.0 |

¹Rated on a scale from 1 to 5, where 1=very unimportant and 5=very important

Travel Characteristics

Visitation history

Respondents indicated a long visitation history coupled with frequent visits. The average number of trips to the Leech Lake in the previous year among respondents was 2.7, although the

majority visited just once (Figure 4). A majority of respondents (87.3 %) had previously visited the area and many of those had a long history of visiting the area (an average of 15.3 years). However, over half of visitors (50.6%) indicated more recent exposure to the area, since 1990, as indicated by the year of their first visit (Table 6). Conversely, over one third (34.7%) had been visiting the area for over twenty years (Figure 5).

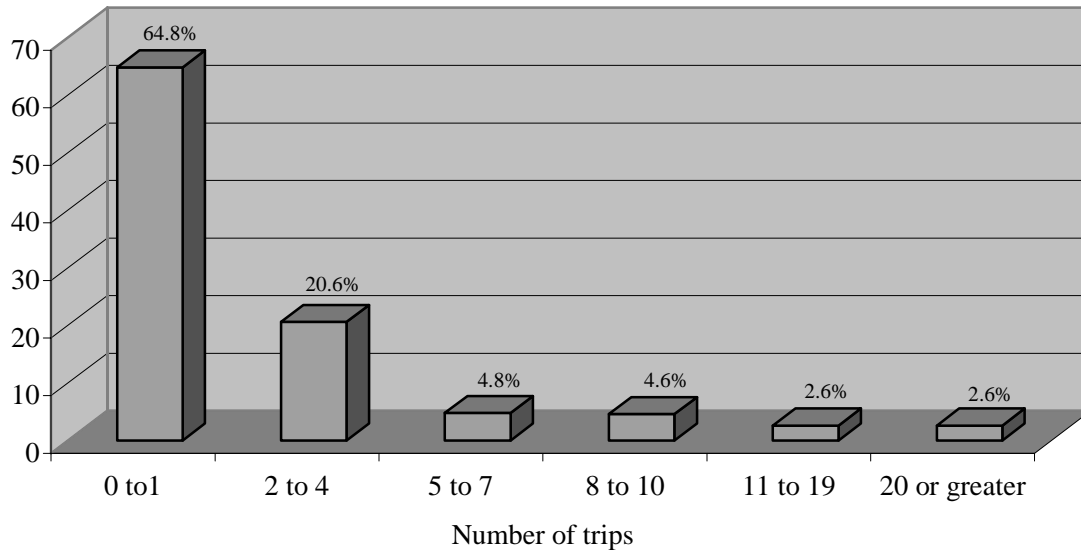


Figure 4. Number of trips to the Leech Lake area in the previous year among Leech Lake area visitor profile respondents, 2004.

Table 6. First year of visitation among Leech Lake area visitor profile respondents, 2004.

| | Frequency | % |
|-----------------|------------------|----------|
| Prior to 1950 | 9 | 1.8 |
| 1950-1959 | 21 | 4.9 |
| 1960-1969 | 50 | 11.5 |
| 1970-1979 | 56 | 13.0 |
| 1980-1989 | 75 | 17.3 |
| 1990-1999 | 111 | 25.6 |
| 2000 to present | 112 | 25.9 |
| Total | 433 | 100.0 |

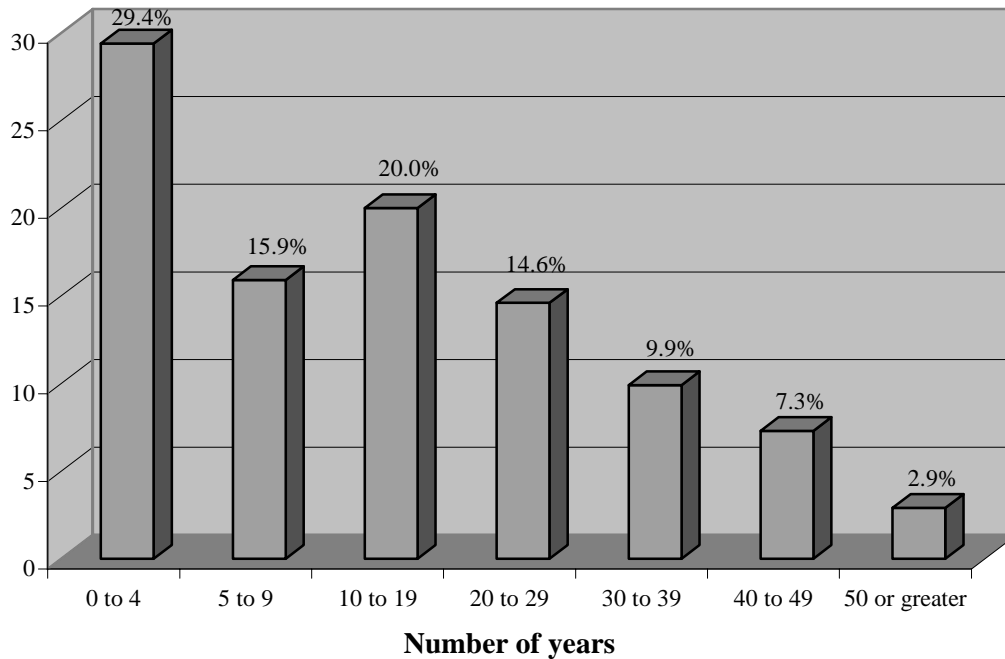


Figure 5. Visitation history among Leech Lake area visitor profile respondents, 2004.

Length of stay and group size

Respondents' length of stay was delineated by both total number of nights away from home and the total number of nights in the Leech Lake area. On average, respondents spent a total of 8.3 nights away from home and, of those, an average of 6.7 were spent in the Leech Lake area. However, the median for both total nights away from home and number of nights in the Leech Lake area was seven. A majority of respondents (74.8%) spent between three and eight days in the Leech Lake area (Table 7). Fewer than ten percent spent one or two days in the Leech Lake area and fewer than five percent spent more than fifteen days. Likewise, very few respondents indicated they did not spend the night (3.7%). However, of those who indicated a day trip to the area, the average number of hours spent in the Leech Lake area was 5.4, with a range of two to eighteen.

Table 7. Nights away from home among Leech Lake area visitor profile respondents, 2004.

| Number of days | Total nights in Leech Lake area | | Total nights away from home | |
|----------------|---------------------------------|-------|-----------------------------|-------|
| | Frequency | % | Frequency | % |
| None | 18 | 3.7 | 7 | 1.4 |
| 1-2 | 49 | 9.9 | 39 | 7.9 |
| 3-4 | 74 | 15.1 | 70 | 14.1 |
| 5-6 | 80 | 16.2 | 76 | 15.3 |
| 7-8 | 214 | 43.5 | 209 | 42.1 |
| 9-14 | 37 | 7.5 | 65 | 13.2 |
| 15 or greater | 20 | 4.1 | 30 | 6.0 |
| Total | 492 | 100.0 | 496 | 100.0 |

Respondents indicated relatively large travel party size, as shown by the average travel party ($M=8.6$ people). Respondents' party size ranged from one to 48 people. However, over one third (41.9%) indicated traveling with four or fewer people (Table 8). Further, very few respondents (1.8%) indicated any international visitors were a part of their travel party.

Table 8. Travel party size among Leech Lake area visitor profile respondents, 2004.

| ($M=8.6$; Median=5.0) | Frequency | % |
|-------------------------|------------------|----------|
| 1-2 | 86 | 17.2 |
| 3-4 | 123 | 24.7 |
| 5-9 | 155 | 31.0 |
| 10-14 | 40 | 8.1 |
| 15-19 | 36 | 7.2 |
| 20-24 | 24 | 4.8 |
| 25-29 | 12 | 2.4 |
| 30 or greater | 23 | 4.6 |
| Total | 499 | 100.0 |

Type of accommodation

A majority of respondents to this questionnaire stayed in resorts (63.7%: Table 9). The second most frequently cited accommodation type was motels or hotels (9.1%). While vacation homes are in the area, few respondents indicated either staying in their own vacation home or the vacation home of a friend or relative (8.3 and 5.0%, respectively). The least frequently cited accommodation types were campgrounds, RV parks, and casino hotels. This could be, in part, due to sampling as we did not have access to the National Forest or casinos.

Table 9. Type of accommodation utilized among Leech Lake area visitor profile respondents, 2004.

| | Frequency | % |
|-------------------------------------|------------------|----------|
| Resort | 316 | 63.7 |
| Motel/hotel | 45 | 9.1 |
| Own vacation home | 41 | 8.3 |
| Vacation home of friend or relative | 25 | 5.0 |
| Cabin rental | 20 | 4.0 |
| Home of friend or relative | 14 | 2.8 |
| RV park | 11 | 2.2 |
| Other | 10 | 2.0 |
| Public/private campground | 10 | 2.0 |
| Casino hotel | 4 | 0.8 |
| Total | 496 | 100.0 |

Travel expenditures

Respondents specified the amount of money they personally spent in the previous 24-hour time period. Average expenditures were calculated based on respondents who reported expenditures in a particular category. Lodging was the top expenditure, in which respondents reported spending an average of \$192.12 (Table 10). Among those who indicated expenditures at a

casino, the average spent was \$65.30. Shopping was also a top expenditure category among respondents, where respondents indicated spending an average of \$61.01. Those who spent on recreation, attractions, or entertainment reported spending an average of \$54.09. Sixty-one percent purchased groceries, with an average expenditure of \$53.03. An average of \$50.85 was spent at restaurants and \$35.78 on transportation. Very few respondents indicated expenditures in the categories of guides/outfitting or cultural arts and similarly, had the lowest reported expenditures (\$28.67 and \$16.38, respectively).

Table 10. Average travel expenditures, by category, among Leech Lake area visitor profile respondents in the previous 24 hours, 2004.

| | M (In U.S. \$) | S.D. (In U.S. \$) |
|--|--------------------------|-----------------------------|
| Lodging (n=268) | 192.12 | 214.02 |
| Casino (n=47) | 65.30 | 62.60 |
| Shopping (souvenirs, gifts, film, etc.) (n=199) | 61.01 | 56.29 |
| Recreation / attractions / entertainment (n=93) | 54.09 | 43.39 |
| Groceries (n=308) | 53.03 | 44.81 |
| Restaurant food / beverages (n=295) | 50.85 | 40.88 |
| Other (n=21) | 42.33 | 33.04 |
| Transportation (gas, parking, repairs, etc.) (n=236) | 35.78 | 26.42 |
| Guides / outfitting (n=9) | 28.67 | 17.15 |
| Cultural arts (n=8) | 16.38 | 23.45 |

Information sources for trip planning

Respondents most frequently used the Internet for trip information planning (52.7%; Table 11). Other top sources of information included previous visits (40.9%) and recommendations from friends or relatives (31.9%). Most of the remaining information sources were utilized by less than a tenth of respondents

Table 11. Information sources used for trip planning among Leech Lake area visitor profile respondents, 2004.

| Information sources (n=364) | Frequency | % |
|---|------------------|----------|
| Internet | 192 | 52.7 |
| Previous visit | 149 | 40.9 |
| Recommendation from friend/relative | 115 | 31.9 |
| Area tourism information (CVB, Chamber) | 52 | 14.3 |
| Other | 32 | 8.8 |
| State tourism information | 28 | 7.7 |
| Visitor/welcome center | 19 | 5.2 |
| Newspaper/magazine ads | 17 | 4.7 |
| Sports show | 9 | 2.5 |
| Automobile club | 8 | 2.2 |
| Article/documentary/news | 7 | 1.9 |
| Travel agency | 1 | 0.3 |

Nature-based tourism interest

Among the nature-based tourist experiences queried, interest in fishing was rated the highest (\underline{M} =4.0; Table 12). Respondents indicated moderate interest in wildlife viewing and nature photography (\underline{M} =3.7 and 3.2, respectively). Specific activities, such as fish hatchery tours, wild rice processing tours, and Winnie Ponds Fish and Wildlife Management self-guided tours garnered lower interest levels among respondents. On average, respondents were least interested in hunting (\underline{M} =2.6).

Table 12. Interest in nature-based tourist experiences among Leech Lake area visitor profile respondents, 2004.

| Opportunities | \underline{M}¹ | S.D. |
|---|---|-------------|
| Fishing (n=502) | 4.0 | 1.1 |
| Wildlife viewing (n=499) | 3.7 | 1.0 |
| Nature photography (n=500) | 3.2 | 1.0 |
| Fish hatchery tours (n=500) | 2.8 | 1.0 |
| Wild rice processing plant tours (n=491) | 2.7 | 1.0 |
| Winnie Ponds Fish and Wildlife Mgmt. Self-guided tour (n=490) | 2.7 | 1.0 |
| Hunting (n=496) | 2.6 | 1.3 |

¹Rated on a scale from 1 to 5, where 1=extremely uninterested and 5=extremely interested

Historic/cultural tourism participation

Similar to TIA findings (2003), a majority of respondents in the Leech Lake area had engaged in travel that included some type of historic or cultural experience in the last twelve months. Specifically, almost three quarters (73.3%) of respondents engaged in culture-based activities or events, while slightly over one half (54.7%) engaged in historic related activities (Table 13).

Leech Lake area visitors share both similarities and differences with the national TIA sample of travelers. One area of similarity was in festival and fair attendance (41.0%). However, Leech Lake area respondents' reported more attendance at art museums or antique establishments. In contrast, Leech Lake area visitors reported less participation in ethnic culture exhibits and performing arts (16%) and performing arts (33.6%).

Table 13. Historic and/or cultural activity participation while traveling in the previous year among Leech Lake area visitor profile respondents, 2004.

| | Frequency | % | TIA sample % |
|---|------------------|-------------|---------------------|
| Overall cultural activity/event | 371 | 73.3 | 75 |
| Art museum/Antique establishment (net) | 292 | 57.7 | 47 |
| Antique shop, show or auction | | | |
| Art museum or gallery | | | |
| Festival/Fair (net) | 223 | 41.0 | 41 |
| Heritage, ethnic or folk festival or fair | | | |
| Other fair or festival | | | |
| Performing arts (net) | 170 | 33.6 | 48 |
| Live theater performance (musical/play) | | | |
| Dance performance | | | |
| Classical music concert or opera | | | |
| Live musical concert | | | |
| Ethnic area/Ethnic culture exhibit (net) | 84 | 16.6 | 33 |
| Ethnic area or community | | | |
| Ethnic culture exhibit or center | | | |
| Overall historic activity/event | 277 | 54.7 | 58 |
| Historic military site | | | |
| Historic memorial or cemetery | | | |
| History museum | | | |
| Designated historic site | | | |
| Historic community or town | | | |

Totals more than 100% as respondents indicated all events or experiences in the last year.

Among the respondents who engaged in historic or cultural travel, the most frequent activities included visits to antique shops or art museums (Figure 6). Approximately half of respondents indicated they had visited a designated historic site or attended a fair or festival in the preceding year (50.3 and 49.5%, respectively). More than a third of respondents visited a historic community or town (42.7%) or history museum (35.7%). Less than a quarter of respondents indicated attendance at live theater performances, historic memorials or cemeteries, heritage, ethnic or folk festival or fairs, historic military sites, or ethnic area or communities.

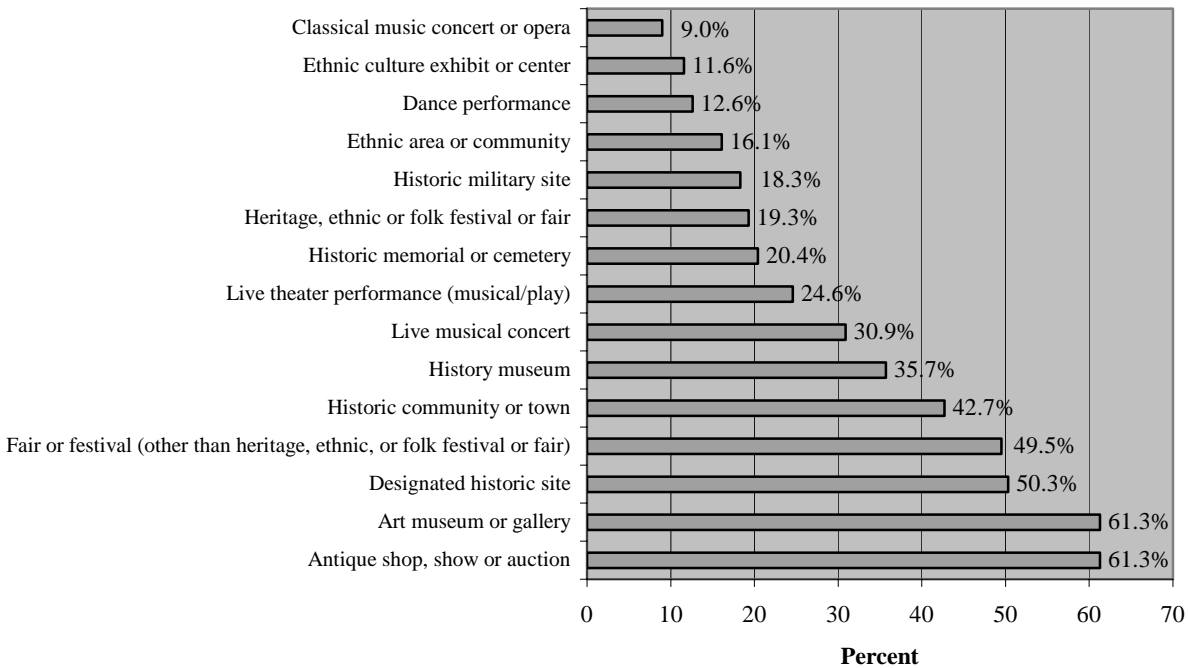


Figure 6. Participation in cultural tourism activities, while on vacation in the previous year, among Leech Lake area visitor profile respondents, 2004 (n=398).

Historic/Cultural tourism interest

On average, respondents indicated low to moderate interest across all six potential experiences (Table 14). However, a percentage of respondents were interested or very interested in the opportunities. To explore respondent heterogeneity, respondents were segmented by their interest, previous participation, and commonalities.

Broad interest level: When respondents were divided into three levels of interest (uninterested, unsure, and interested), most were unsure about each experience opportunity and the lowest percent were interested or very interested in them (Figure 7). The potential experiences that had the highest percent of interested respondents were traditional Native American dance performances, tribal gift shops, and Native American cultural heritage history center.

Table 14. Interest in culture-based tourist experiences among Leech Lake area visitor profile respondents, 2004.

| Opportunities | M¹ | S.D. |
|--|----------------------|-------------|
| Native American cultural heritage history center (n=500) | 2.9 | 1.0 |
| Tribal gift shops (cultural art) (n=494) | 2.9 | 1.0 |
| Traditional Native American dance performances (n=499) | 2.9 | 1.0 |
| Cultural arts demonstrations (i.e. birch bark baskets, etc.) (n=501) | 2.8 | 1.0 |
| Tours put on by an American Indian Tribe (n=496) | 2.8 | 1.0 |
| Traditional Native American story telling (n=487) | 2.8 | 1.0 |

¹Rated on a scale from 1 to 5, where 1=extremely uninterested and 5=extremely interested

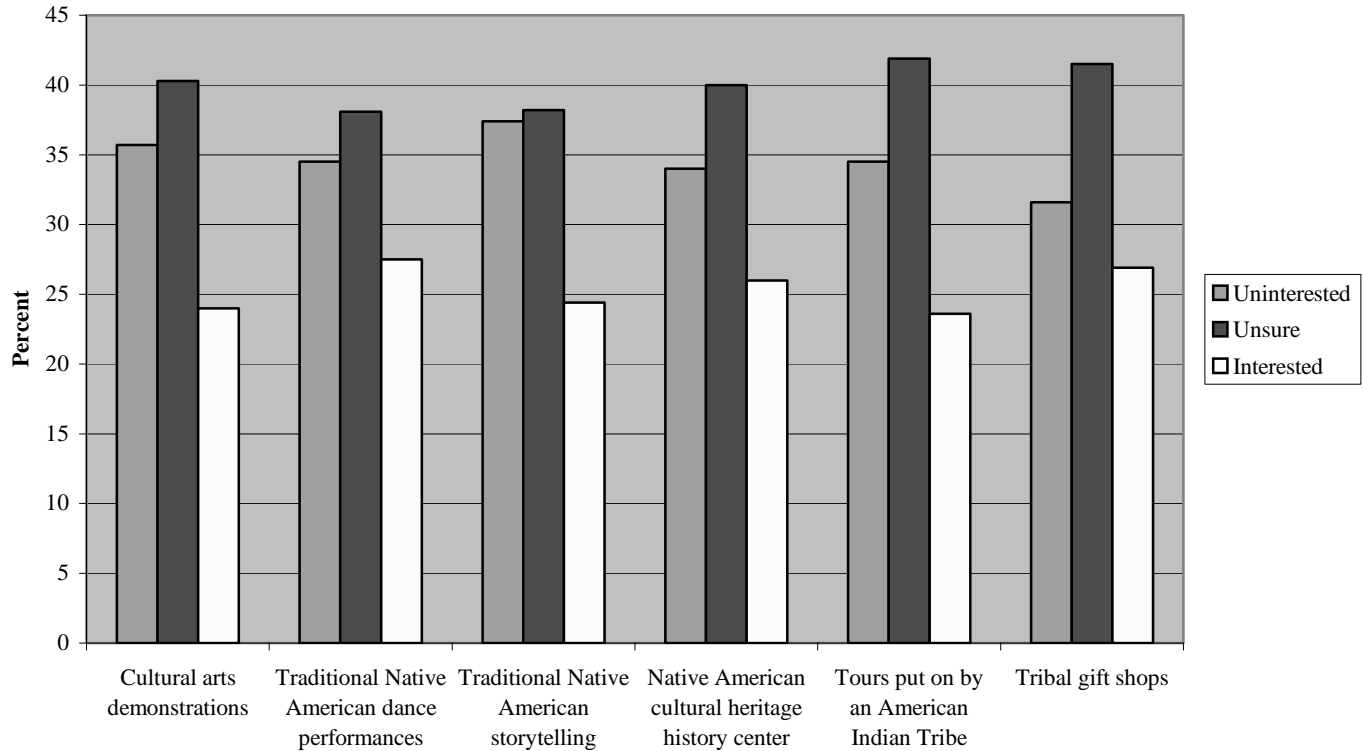


Figure 7. Interest levels in culture-based tourist experiences among Leech Lake area visitor profile respondents, 2004.

Previous travel engagement: A composite score of involvement in TIA’s fifteen cultural/historic tourism activities was calculated (range 0 -15). Respondents were then divided by score and compared. Significant differences emerged among interest levels across all six cultural tourism experiences (Table 15). Overall, as previous engagement in cultural or historic tourism increased so did level of interest in cultural based tourism experiences.

Cluster analysis-visitor commonalities: To further explore interest in culture-based tourist experiences, cluster analysis was performed. Cluster analysis facilitates the ability to subdivide the sample into homogenous groups based on selected variables of interest. Using the six culture-based tourism experiences, a series of K-means cluster analyses were performed, ranging from three to five clusters. Ultimately, a four-cluster solution was deemed the most appropriate due to the number of cases in each grouping. The four cluster interest groupings were labeled low, passive moderates, active moderates, and high. Statistical procedures were conducted to assess differences among the groups with respect to demographics. Chi-squared analysis indicated a greater percentage of females comprised the active moderates and the high interest groups (chi-square=10.28; $p < .05$). A greater percentage of those who were in the high interest group had completed an advanced degree (chi-square=37.66; $p < .01$). Tukey post hoc tests indicated significant differences in age ($p < .01$), where the low interest group average age was

younger ($M=44.2$ years) than the passive moderates and the high interest groups ($M=49.8$ and 48.5 years, respectively).

Table 15. Comparing interest in culture-based tourist experiences by cultural tourism involvement among Leech Lake area visitor profile respondents, 2004.

| | None (n=107) | One (n=85) | Two or Three (n=107) | Four or Five (n=90) | Six or More (n=110) | F-value |
|--|----------------------|----------------------|----------------------------|---------------------------|---------------------------|-----------------------|
| | <u>M</u> | <u>M</u> | <u>M</u> | <u>M</u> | <u>M</u> | |
| Tribal gift shops (cultural art) | 2.4 ^{a,b,c} | 2.7 ^{d,e} | 3.0 ^{a,f} | 3.1 ^{b,d} | 3.3 ^{c,e,f} | 17.210 ^{***} |
| Native American cultural heritage history center | 2.3 ^{a,b,c} | 2.4 ^{d,e,f} | 2.9 ^{a,d,g} | 3.1 ^{b,e,h} | 3.5 ^{c,f,g,h} | 32.570 ^{***} |
| Tours put on by an American Indian Tribe | 2.3 ^{a,b,c} | 2.4 ^{d,e,f} | 2.9 ^{a,d,g} | 3.0 ^{b,e,h} | 3.4 ^{c,f,g,h} | 28.789 ^{***} |
| Traditional Native American dance performances | 2.3 ^{a,b,c} | 2.4 ^{d,e,f} | 3.0 ^{a,d,g} | 3.0 ^{b,e,h} | 3.5 ^{c,f,g,h} | 28.947 ^{***} |
| Traditional Native American story telling | 2.3 ^{a,b,c} | 2.4 ^{d,e,f} | 2.9 ^{a,d,g} | 2.9 ^{b,e,h} | 3.5 ^{c,f,g,h} | 28.050 ^{***} |
| Cultural arts demonstrations (i.e. birch bark baskets, etc.) | 2.2 ^{a,b,c} | 2.5 ^{d,e,f} | 2.9 ^{a,d,g} | 3.0 ^{b,e} | 3.3 ^{c,f,g} | 24.804 ^{***} |

^{***} Significant differences at the $p<.001$ level.

Ms with same superscript are significantly different at the $p<.05$ level

Among those in the low cluster, very little interest was exhibited in any of six culture-based experiences (Table 16). Respondents who indicated moderate interest separated into two clusters: passive and active. Passive moderates were more interested in observing culture and, compared to the active moderates, exhibited slightly lower interest in five of the six experience items. Among the active moderates, cultural heritage history center ($M=3.1$) and tribal gift shops ($M=3.1$) were of greatest interest. While respondents in the high cluster indicated a greater overall interest in culture-based tourist experiences, the top three experiences were dance performances ($M=4.1$), story telling ($M=4.1$), and cultural heritage history center ($M=4.0$). They were least interested in tribal gift shops and cultural arts demonstrations.

Travel characteristics were compared among the clusters. Significant differences emerged in two travel characteristics: group size and visitation history (Table 17). Those in the high interest groups indicated smaller travel parties and a longer visitation history in the area.

Table 16. Comparing interest in culture-based tourist experiences among Leech Lake area visitor profile respondents, 2004.

| | Low (n=158) | Passive Moderates (n=46) | Active Moderates (n=165) | High (n=98) | F-value* |
|--|------------------------|---|---|------------------------|-----------------|
| | <u>M</u> | <u>M</u> | <u>M</u> | <u>M</u> | |
| Tribal gift shops (cultural art) | 2.0 | 2.9 | 3.2 | 3.8 | 163.90 |
| Cultural arts demonstrations (i.e. birch bark baskets, etc.) | 1.9 | 3.8 | 2.8 | 3.8 | 299.73 |
| Native American cultural heritage history center | 1.8 | 2.9 | 3.2 | 4.0 | 439.75 |
| Tours put on by an American Indian Tribe | 1.8 | 3.0 | 3.1 | 3.9 | 355.74 |
| Traditional Native American dance performances | 1.8 | 3.0 | 3.1 | 4.1 | 462.59 |
| Traditional Native American story telling | 1.7 | 2.7 | 3.1 | 4.1 | 588.52 |

*F-test values are used purely for descriptive purposes, as clusters have been chosen to maximize differences among cases in the different clusters.

Table 17. Comparison of travel characteristics by culture-based tourist experience interest levels among Leech Lake area visitor profile respondents, 2004.

| | Low (n=158) | Passive Moderates (n=46) | Active Moderates (n=165) | High (n=98) | F-value |
|---------------------------------|------------------------|---|---|------------------------|--------------------|
| | <u>M</u> | <u>M</u> | <u>M</u> | <u>M</u> | |
| Party size | 10.0 ^a | 9.7 | 7.8 | 6.6 ^a | 4.10 ^{**} |
| Total nights away from home | 7.9 | 8.8 | 8.2 | 9.2 | 0.36 |
| Total nights in Leech Lake area | 6.9 | 7.0 | 6.8 | 6.5 | 0.10 |
| Years visiting Leech Lake area | 13.6 ^a | 14.4 | 14.5 | 19.1 ^a | 3.03 [*] |
| Trips in previous year | 2.8 | 2.8 | 2.8 | 2.8 | 0.00 |

*Significant differences at p<.05 level; **Significant differences at p<.01 level

Ms with same superscript are significantly different at the p<.05 level

Chi-square analysis assessed differences in the percentage of each group who used various trip planning information sources. Among all groups, the top three sources included previous visit, Internet, and recommendations from friends and relatives (Table 18). Passive moderates and high interest respondents used local and state tourism information centers significantly more than the other groups.

Table 18. Comparison of information sources used by culture-based tourist experience interest among Leech Lake area visitor profile respondents, 2004.

| | Low (n=158) | Passive Moderates (n=46) | Active Moderates (n=165) | High (n=98) | Chi- Square |
|---|----------------|--------------------------------|--------------------------------|----------------|----------------|
| | % | % | % | % | |
| Previous visit | 32.9 | 26.1 | 26.1 | 32.7 | 2.52 |
| Internet | 31.0 | 43.5 | 43.6 | 40.8 | 6.25 |
| Recommendation from friend/relative | 20.3 | 21.7 | 21.8 | 26.5 | 1.43 |
| Other | 7.0 | 2.2 | 7.3 | 6.1 | 1.67 |
| Area tourism information (CVB, Chamber) | 6.3 | 21.7 | 8.5 | 12.2 | 10.51* |
| Sports show | 1.9 | 4.3 | 1.2 | 2.0 | 1.88 |
| Newspaper/magazine ads | 1.3 | 2.2 | 3.6 | 6.1 | 4.85 |
| State tourism information | 1.3 | 8.7 | 4.8 | 11.2 | 12.98** |
| Automobile club | 0.6 | 0.0 | 1.8 | 3.1 | 3.24 |
| Visitor/welcome center | 0.6 | 4.3 | 2.4 | 10.2 | 16.87** |
| Article/documentary/news | 0.0 | 2.2 | 1.9 | 2.0 | 3.16 |
| Travel agency | 0.0 | 0.0 | 0.6 | 0.0 | 1.83 |

*Significant differences at p<.05 level; ** Significant differences at p<.01 level

DISCUSSION

The purpose of this project was to understand visitors to the Leech Lake area and their specific interests in culture and nature-based experiences. Specific objectives were to:

- 1) profile existing tourists in the Leech Lake area,
- 2) identify travel characteristics and expenditures in the Leech Lake area,
- 3) assess interest in nature-based and culture-based tourism among existing tourist base,
- 4) measure tourists previous engagement in culture-based tourism, and
- 5) provide insight into culture-based tourism development opportunities.

Prior to any discussion, we acknowledge that successful tourism development depends on accurate community and tribal assessments of attitudes toward that development. A case study conducted among the Yavapi-Apache Nation suggests internal decision making is essential: “culture must be reinforced by initiating development actions that encompass the cultural subsystem: kinship, religion, the internal political system, education and local economies...planning within the culture, then, provides, for a wide variety of creative possibilities with regard to tourism that may be neglected without tribal control over its own resources” (Piner and Paradis 2004, p. 95). Methods to engage in this discussion include in-depth interviews among key community players, focus groups, and/or a tourism impact assessment, using the tourism impact assessment scale developed by Lankford (1994).

Certainly any form of tourism development has opportunities and challenges. Cultural and historic tourism, in particular, can provide both economic and cultural benefits to communities. Among the opportunities are the idea to learn about, share and preserve culture as well as revitalize local traditions and sense of place (Besculides, Lee, and McCormick 2002; Nicholls et

al. 2004). However, along with these come the challenge of providing authentic experiences that do not commodify the culture. While it remains important to understand the desires and interests of tourists, it is imperative to also determine what aspects of a culture (i.e. practices, traditions, and beliefs) can be shared, transferred, or presented. This type of information can and should be obtained from the tribal members themselves.

Information on the tourists, however, is essential as such development opportunities are considered. Discussion of the results from the onsite questionnaire administered onsite summer 2004 in the Leech Lake area is presented in three sections with recommendations embedded within each section: respondents and their characteristics, information used to plan the trip, engagement and interest in nature based tourism, as well as engagement and interest in culture based tourism.

Respondents and their characteristics

Leech Lake area visitor respondents were mature, Anglo and possessed high educational and income status. These visitors reflect the nature and culture based tourism market that, compared to other travelers, is older, more likely to be retired, more affluent, and more educated (TIA 2003). The majority of area visitors represent a couple, with or without children, seeking to enhance social bonds as well as escape the daily routine within a natural setting through a recreation travel experience that included fishing. Thus, they reflect the dual motivations of travelers seeking both personal and intrapersonal rewards.

The angling market is not unique to Leech Lake, however their resources are arguably among the biggest and best in the state. Therefore, fishing will remain a stable market for the area as long as angling thrives. However, nationally, angling has been declining in participation. The USFWS (2002) reports that from 1991 to 2001, freshwater fishing participation declined by 8%.

In terms of stay, Leech Lake area respondents indicated a longer stay (6.7 nights vs. 3 nights, respectively; Minnesota Department of Employment and Economic Development 2002) than the typical Minnesota traveler. This is, in a large part, attributed to the proportion of respondents staying in resorts. Typically, a resort unit is rented by the week. As travel trends suggest shorter and more frequent vacations, monitoring visitor length of stay and its impacts on the Leech Lake market is of interest. Recent research on the resort market indicates that the baby boomers will remain the key component (Goodman 1994). However, this 'boomer' also has specific desires for novelty (National Travel Monitor 1998), family accommodations (Chon and Singh 1995), as well as flexible resort opportunities: educational, cultural, or sport experiences (Cato and Knustler 1988). Thus, the boomers are appealing base for cultural tourism development.

Compared to previous visitor profile studies in other surrounding areas, Leech Lake area visitors tended to have longer stays and larger travel parties. Studies conducted by University of Minnesota Tourism Center report the average travel party both in Itasca county and Brainerd were four (Erkkila 2002; Love, et. al 2001), whereas Leech Lake area visitors travel party averaged over twice that (\bar{M} =8.6). Similarly, Leech Lake area visitors reported longer stays compared to both Brainerd and Itasca county visitors (6.7 nights, 5 nights, and 4.8 respectively).

One potential market for cultural based tourism in this area is international visitors, as one-third of all international tourists go to a historic/cultural site or event (TIA 2003). Given the proximity to Canada as well as the draw of American Indian culture, international tourists may be an potential market once additional products and programs are developed.

Information sources for trip planning

Following national and state trends, travel planning continues to be increasingly reliant on the Internet. Leech Lake area visitors are online and mirror the use of other travelers in their use of the Internet to plan and book travel. Through 1998-2001, a 395 percent increase in online travel planning emerged (TIA 2001) although the number stabilized at about 64 million in 2003 (TIA 2004). Respondents in this sample used the Internet at about two times the frequency compared to U.S. overseas travelers (52 percent compared to 36) and DTED survey respondents (20.3 percent, 2001). Minnesota tourism professionals recognize the Internet as both a current and future important issue for the tourism industry (Schneider 2001). Subsequently, ensuring current and interesting web pages represent the area is critical. Further exploration of exactly what resources visitors are using on the Internet would be helpful for advertising as well as to clarify if, in fact, visitors are using information on the Internet provided by the local tourism organizations.

In addition to the Internet, previous experiences and word of mouth via friends and families remain important information sources for trip planning. Subsequently, ensuring positive onsite experiences remains critical for that ever-present informal information sharing among friends and family. Given the perceived time deficit among U.S. travelers, the quality of vacation experiences becomes imminently important.

Use of information differed by level of interest in culture-based tourism. As both passive and interested cultural/historic travelers used local and state information sources more than the others, accurate and interesting information at these venues is encouraged. Participating and partnering with the numerous Leech Lake area community and regional tourism organizations can improve resource utilization, product awareness, and product development

Engagement and interest in nature based tourism

While the majority of pleasure travelers were there to fish, another nature based activity of interest among them is wildlife viewing. Data from the 2001 U.S Fish and Wildlife Service Wildlife Recreation Survey identify more than 82 million U.S. residents (16 years and older) fished, hunted, or watched wildlife in 2001. Wildlife viewing accounted for 66 million participants in the U.S. population, about one in three (31%), and a five percent increase in participant numbers since 1995. Wildlife watchers spent \$38 billion on trips, equipment, and other items in 2001, a sixteen percent increase from 1995.

Specific to wildlife viewing, Minnesota ranked second in participation behind Vermont in the 2000 national survey of wildlife related recreation (USFWS 2002). Minnesota's wildlife viewing participation rate increased 53 percent from 1996-2001 and spending rose 36 percent in the same time frame to \$523.5 million. Similar to the Leech Lake visitor, Minnesota wildlife

viewers are mature, Anglo, and possess above average educational and income status (Schneider and Salk, 2002). Of these, respondents indicated they were willing to travel 632.2 miles, on average, to view wildlife and the north central resident took 5 trips to view wildlife within the region in the last year. Beyond attention to the wildlife viewing experience itself, a combination of additional nature based activities and cultural/historic opportunities are likely to enhance experiences and extend wildlife viewing trips and vice versa. Therefore, marketing and partnering with local area attractions is suggested. In the local area, key attractions to consider partnering with include Pine Point Research Natural area within the Chippewa National Forest and Deep Portage Conservation Area (Henderson et al. 1997). Such product development could provide additional offerings to current visitors as well as attract a new market.

Given the majority of current recreational visitors are there to fish, further consideration of a fish hatchery tour seems logical. Such an attraction may be particularly well attended during shoulder and off seasons, as well as for those days where fishing is impossible due to the weather. Inclusion of both historical and cultural elements within the tour can emphasize the educational aspect of the tour and subsequently, may qualify for grant monies for development.

Engagement and interest in culture based tourism

Like the traveling U.S. population, Leech Lake area visitors have a range of experiences in recent cultural/historic event participation while traveling. When asked to consider interest for such opportunities in the Leech Lake area, summer 2004 tourists were largely unsure of their interest. Although nature-based tourism opportunities abound, as of 2004, few culture-based opportunities exist in the Leech Lake area, particularly those geared to tourists interested in American Indian culture. Thus, without tangible products and examples, such uncertainty among the current base seems understandable.

Similar to past research (Moscardo and Pearce 1999), four levels of interest in cultural tourism emerged. The previous work that explored cultural tourism in Australia found cultural tourists differed in the types of experiences they sought which our results indirectly support. Specifically, the most interested group wanted to learn, participate, and have direct contact with native people. The passive cultural learning group had high interest levels in cultural tourism, but not in direct contact with the culture. The ethnic products and activities group indicated low interest in both direct contact and cultural learning, but more interest in food, crafts, and participation in traditional activities. Respondents with the least interest may likely have been part of a group trip of which they were obligated to attend. Given the Leech Lake profile was an initial effort to identify and segment culture based tourists, further research can detail the primary interests among the segments.

Initial product and program development should focus in on the twenty percent of respondents who expressed interest in cultural-based tourism opportunities. Qualitative research with focus groups of existing travelers, and potential travelers, could clearly delineate the key elements of the primary interest areas. However, without that information and based on respondent interest and previous cultural travel engagement, developing attractions and/or programs based in American Indian art and related products seems prudent. Estimates suggest that U.S. and foreign born tourists spend as much as \$1 billion on Native American arts and crafts annually

(Miller 2004). The broad interest in gift shops among all respondents to this questionnaire, coupled with their spending on gifts, suggests that a gift shop should definitely be apart of whatever offering emerges. One suggestion might be to expand the existing shop or create a new one, such that there is room for demonstrations and a small exhibit.

Most cultural travelers participate in more than one cultural activity, attraction, or destination during their trip (Zeppel 2002) and therefore, it is important to have a package of opportunities to consider. Among tourists to a First Nations attraction, visitors indicated their desires to learn history, meet tribal people, and observe traditional craft activities (Zeppel 2002). Subsequently, interactive educational opportunities with observations are an obvious draw. Programmatically, the existing travel market in the Leech Lake area places heavy emphasis on time spent with family, therefore any tourism developments should be family friendly and incorporate multiple program opportunities, discounted family packages, and a variety of educational programs for various cognitive levels

Given the extensive use history among respondents, learning more about their attachment to the Leech Lake area may assist with program and product development. Research indicates a positive relationship between experience and place attachment, the emotional and functional bonds to a place (Williams Patterson, Roggenbuck, and Watson, 1992). If visitors are attached to a place, it may be that they desire specific information about its origin, evolution, and meaning to others. Framing some of the programming and tourism products using a common place that both the tribe and visitors care about may prove a useful marketing strategy as well as a way to ease the stress of cultural tourism on the tribe.

Fortunately, the information sources most used by cultural travelers are the same as those used by the current Leech Lake visitor base: Internet (TIA 2003), word of mouth (TIA 2003; Prideaux and Kininmont 1999), and friends and family (Prideaux and Kininmont 1999). Therefore, information developed to specifically reach cultural tourists will, by default, likely reach the current base. Regarding information about cultural opportunities, the 2004 opening of the National Museum on the American Indian may serve as an initial awareness raising and interest piquing both regionally and nationally.

Future research

This project was the first attempt to investigate interest in culture-based tourism opportunity, particularly focused on American Indians, in Minnesota by tribal groups. A focus on respondent profiles and limited resources constrained the amount and type of information attained in the questionnaire. Therefore, additional information would both enhance understanding of current findings as well as expand on the knowledge base for this constituency group.

Prior to suggesting future research ideas, however, the limitations of this data must be acknowledged. The primary limitations focus on the quantitative method and sample. Questionnaires are extremely useful to obtain information from a large number of people in a relatively short amount of time. However, due to their quantitative nature and space constraints, questionnaires limit the breadth and depth of information attained. Further, rather than examining actual behavior, it relies on recall and estimates of future participation. Also, the sample was limited to summer visitors in a variety of locations, but not the casinos or National

Forest. Specific future research opportunities relate to qualitative research for product development, product and program monitoring, as well as state and regional comparison.

The uncertainty of the current market about future culture tourism opportunities suggests product expectations and preferences are not yet set. Therefore, a unique opportunity arises to include the market in the initial phase of product development and, subsequently, craft products to largely meet expectations. With knowledge of consumer expectations and preferences, the tribe can choose among the potential projects those that celebrate the culture, while protecting those that may impede on its sacredness.

As nature and cultural tourism opportunities are considered, identifying their important elements and how the opportunities perform on those elements will be critical. Importance-Performance (I-P) analysis examines program attribute importance and either customer satisfaction of or agency performance on these same attributes (Martilla and James 1977). I-P analysis appeals to managers because of its ease of application, utility, and potential for immediate feedback. Typically three steps lead to an I-P analysis: 1) identify a list of attributes that may impact leisure experiences and which management can control, 2) visitors rate the attributes on importance to the experience and how well the organization performed on them, and 3) interpret the ratings in a two-dimensional grid that also provides a visual data representation (Figure 8). Then, the evaluating organization provides immediate attention to items in the upper left quadrant, maintains services to those in the upper right, and considers reducing resources to those in the lower right. Further, with a standard list of important attributes to cultural tourism, performance among sites and areas could be compared and resources allocated appropriately.

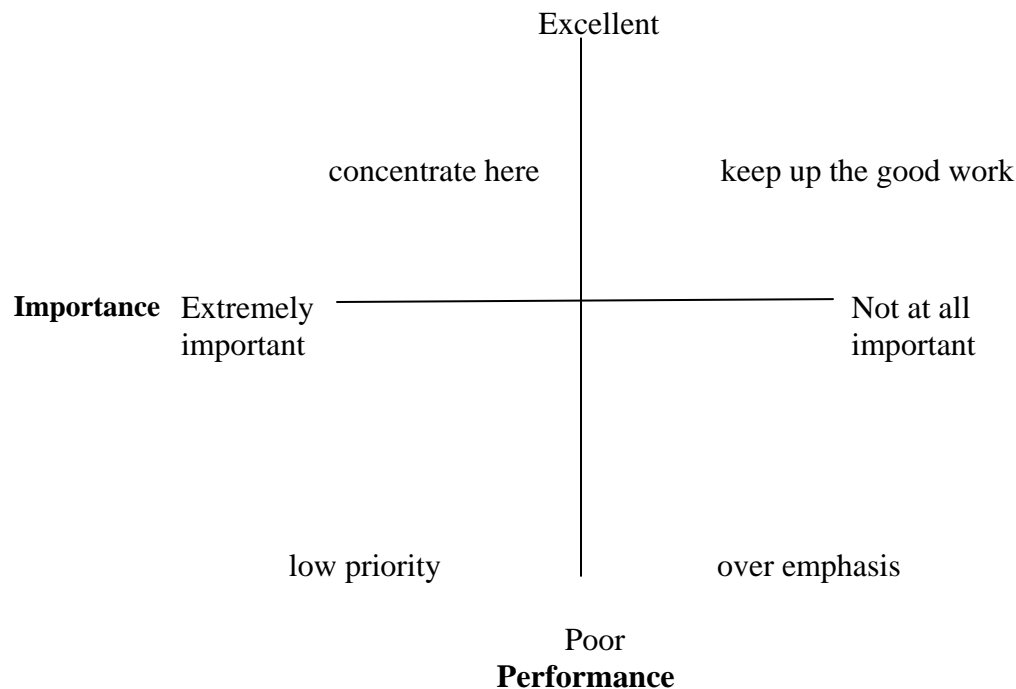


Figure 8. Importance-performance grid adapted from Martilla and James 1977.

As this project was the first known and published efforts to explore specific interests in American Indian cultural tourism among Minnesota tourists, future research could replicate the project in various regions. Further, exploring partnerships and information sources held by other entities is suggested such that all available information is used. For instance, Minnesota State Parks and/or the Minnesota Historical Society may have information on general interest in cultural and historic sites. Also, other tribal groups are actively pursuing cultural tourists via the arts (Mille Lacs, for example) and therefore, partnering and information sharing with them is suggested.

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APPENDIX A
Survey Instrument



University of Minnesota Tourism Center Leech Lake Area Visitor Profile Study

What is your primary destination for this trip? (Mark ONE)

- Leech Lake Cass Lake Lake Winnibigoshish Walker Bemidji Deer River Bena Other _____

What is the primary reason that you made this trip to the Leech Lake area? (Mark ONE)

- Business Pleasure or recreation Own a vacation home in the area
 Combined business and pleasure Fishing Other _____
 Just passing through Festival / special event: _____
 Visiting friends / relatives

Is this your first trip to the Leech Lake area? (Mark ONE) Yes No

- How many trips have you taken to the Leech Lake area in the last year?** _____ Trips _____ Don't recall
How many years have you been coming to the Leech Lake area? _____ Years _____ Don't recall
What was the first year you came to the Leech Lake area? 19 _____ _____ Don't recall

Below is a list of possible experiences that you may have had while visiting the Leech Lake area. Please look over the list of possible experiences **Indicate how important each experience was to you on your visit to the area.**

| Experience | Very unimportant | Unimportant | Neither/ Neutral | Important | Very important |
|---|------------------|-------------|------------------|-----------|----------------|
| To enjoy the scenery | 1 | 2 | 3 | 4 | 5 |
| To get away from the usual demands of life | 1 | 2 | 3 | 4 | 5 |
| To experience natural quiet | 1 | 2 | 3 | 4 | 5 |
| To be close to nature | 1 | 2 | 3 | 4 | 5 |
| To meet new people | 1 | 2 | 3 | 4 | 5 |
| To do something with the family | 1 | 2 | 3 | 4 | 5 |
| To view wildlife | 1 | 2 | 3 | 4 | 5 |
| To learn more about nature | 1 | 2 | 3 | 4 | 5 |
| To experience solitude | 1 | 2 | 3 | 4 | 5 |
| To learn more about the local culture | 1 | 2 | 3 | 4 | 5 |
| To learn about the cultural history of the area | 1 | 2 | 3 | 4 | 5 |

On vacation, how interested are you in the following opportunities?

| | Extremely uninterested | Uninterested | Neutral | Interested | Extremely interested |
|--|------------------------|--------------|---------|------------|----------------------|
| Cultural arts demonstrations (i.e. birch bark baskets, etc.) | 1 | 2 | 3 | 4 | 5 |
| Traditional Native American dance performances | 1 | 2 | 3 | 4 | 5 |
| Traditional Native American story telling | 1 | 2 | 3 | 4 | 5 |
| Native American cultural heritage history center | 1 | 2 | 3 | 4 | 5 |
| Tribal gift shops (cultural art) | 1 | 2 | 3 | 4 | 5 |
| Wild rice processing plant tours | 1 | 2 | 3 | 4 | 5 |
| Fish hatchery tours | 1 | 2 | 3 | 4 | 5 |
| Winnie Ponds Fish and Wildlife Mgmt. Self-guided tour | 1 | 2 | 3 | 4 | 5 |
| Fishing | 1 | 2 | 3 | 4 | 5 |
| Hunting | 1 | 2 | 3 | 4 | 5 |
| Wildlife viewing | 1 | 2 | 3 | 4 | 5 |
| Nature photography | 1 | 2 | 3 | 4 | 5 |

In the past year, while on vacation, have you visited or attended the following...(check all that apply)

- | | | |
|--|--|---|
| <input type="checkbox"/> Designated historic site | <input type="checkbox"/> Historic community or town | <input type="checkbox"/> History museum |
| <input type="checkbox"/> Historic military site | <input type="checkbox"/> Historic memorial or cemetery | <input type="checkbox"/> Art museum or gallery |
| <input type="checkbox"/> Antique shop, show or auction | <input type="checkbox"/> Ethnic area or community | <input type="checkbox"/> Ethnic culture exhibit or center |
| <input type="checkbox"/> Live theater performance | <input type="checkbox"/> Dance performance | <input type="checkbox"/> Classical music concert or opera |
| <input type="checkbox"/> Live musical concert | <input type="checkbox"/> Heritage, ethnic or folk festival or fair | <input type="checkbox"/> Other fair or festival |

How many people are in your travel party (including yourself)? _____ People

Are there any international visitors in your travel group? Yes No

How many total nights will you be away from home on this trip? _____ Nights

How many of these nights will be in the Leech Lake area? _____ Nights

If this is a day trip, how many hours will you be in the Leech Lake area? _____ Hours

What type of accommodation are you staying in?

- | | | |
|---|--|---|
| <input type="checkbox"/> Bed and Breakfast | <input type="checkbox"/> Hotel / motel | <input type="checkbox"/> Vacation home of friend / relative |
| <input type="checkbox"/> Cabin rental | <input type="checkbox"/> Public/private campground | <input type="checkbox"/> Your own vacation home |
| <input type="checkbox"/> Casino hotel | <input type="checkbox"/> Resort | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Home of friend or relative | <input type="checkbox"/> RV Park | |

Please estimate the amount of money YOU spent in Leech Lake area in the last 24 hours. If NONE, write "0."

- | | | | |
|--|----------|----------------------------|----------|
| Lodging | \$ _____ | Recreation / attractions / | |
| Restaurant food / beverages | \$ _____ | entertainment | \$ _____ |
| Groceries | \$ _____ | Guides / outfitting | \$ _____ |
| Transportation (gas, parking, repairs, etc.) | \$ _____ | Casino | \$ _____ |
| Shopping (souvenirs, gifts, film, etc.) | \$ _____ | Other: _____ | \$ _____ |
| Cultural arts | \$ _____ | | |

If you have NOT been in Leech Lake for 24 hours, indicate the number of hours included in spending estimate _____ Hours

While planning this trip did you use any of the following information sources? (check all that apply)

- | | | |
|--|---|--|
| <input type="checkbox"/> Area tourism information (CVB, Chamber) | <input type="checkbox"/> Article/documentary/news | <input type="checkbox"/> Automobile Club |
| <input type="checkbox"/> Internet | <input type="checkbox"/> Newspaper/magazine ads | <input type="checkbox"/> Previous visit |
| <input type="checkbox"/> Recommendation from friend/relative | <input type="checkbox"/> Sports show | <input type="checkbox"/> State tourism information |
| <input type="checkbox"/> Travel agency | <input type="checkbox"/> Visitor/Welcome center | <input type="checkbox"/> Other _____ |

A few questions about you

Which best describes your household? (mark one)

- | | | | |
|---|--|---|--------------------------------------|
| <input type="checkbox"/> Couple (children under 18) | <input type="checkbox"/> Couple (grown children) | <input type="checkbox"/> Couple (no children) | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Single (children under 18) | <input type="checkbox"/> Single (grown children) | <input type="checkbox"/> Single (no children) | |

What is the highest level of education you have completed?

- | | | |
|---------------------------------------|--|--|
| <input type="checkbox"/> Eighth grade | <input type="checkbox"/> High school/GED | <input type="checkbox"/> Tech School |
| <input type="checkbox"/> Some college | <input type="checkbox"/> College degree | <input type="checkbox"/> Advanced degree |

What is your annual household income (before taxes)?

- | | | | |
|--|--|--|--|
| <input type="checkbox"/> Less than \$5,000 | <input type="checkbox"/> \$5,000-9,999 | <input type="checkbox"/> \$10,000-14,999 | <input type="checkbox"/> \$15,000-24,999 |
| <input type="checkbox"/> \$25,000-34,999 | <input type="checkbox"/> \$35,000-49,999 | <input type="checkbox"/> \$50,000-74,999 | <input type="checkbox"/> \$75,000-99,999 |
| <input type="checkbox"/> \$100,000-124,999 | <input type="checkbox"/> \$125,000 or more | | |

What is your gender? Male Female

What is your ethnicity? Hispanic Non-hispanic

What is your race? (check all that apply)

American Indian or Alaska Native

Asian

Black or African American

Native Hawaiian or other Pacific Islander

White

Other (Explain:_____)

Are you enrolled in a Federally recognized tribe? Yes No

Are you a Treaty enrolled member (Canada)? Yes No

What year were you born? 19_____

What is your Zip Code_____

APPENDIX B

Front End Questionnaire

Date: _____ Location: _____

1. Do you live six or more months of the year in the area? Yes (thank/terminate) No (continue)
2. What is the main purpose of your trip? Business Pleasure Both
3. What is your zip code? _____
4. Gender Male Female
5. Would you complete this questionnaire for the University of Minnesota? Yes No

APPENDIX C Survey Intercept Sites

WALKER AREA

Accommodations

Adventure North Resort
Agency Bay Resort
AmericInn
Anderson's Cove Resort
Anderson's Spirit of the North Resort
Bayside Resort
Bailey's Resort
Big Rock Resort
Birchwood Resort
Brindley's Resort
Hiawatha Beach Resort
Huddle's Resort
Ivanhoe's Resort
Northland Lodge
Moore's Resort
Red Ring Lodge
Shores of Leech Lake Campground
Steamboat Bay Resort
Stony Point Resort

Trader's Bay Resort

Attractions

Cass County Museum
Coborn's Leech Lake Cruises
Forestedge Winery
Heritage Trail, Walker Rest Stop
Hwy 371 Public Boat Landing
Moondance Ranch and Adventure Park
Walker City Dock

Restaurants/Bars

Dairy Queen
Jimmy's Family Restaurant
Pepper's Bar and Grill
Village Square Coffee
Walker Bay Coffee Co.

Retail

Reed's Sporting Goods

CASS LAKE AREA

Accommodations

Angler's Beach Resort
Birch Villa Resort
Break on the Lake Resort
Cass Lake Lodge
Chippewa Paws Resort
Finn N' Feathers Resort
Morning Star Resort
Norway Beach Resort
Oak Haven Resort
Ojibway Resort
Phelp's/River Lake Resort

Shangri-La Resort
Sah-Kah-Tay Beach Resort
Sunset Cove Resort
Wishbone Resort

Attractions

Highway 2 Rest Area
Lyle's Logging Camp/Cass Lake Museum

Events

RibFest

BENA AREA

Accommodations

Becker's Resort
McArdle's Resort

Northland Lodge
Williams Narrow Resort
Pine Grove Resort

APPENDIX D

Survey Responses



University of Minnesota Tourism Center Leech Lake Area Visitor Profile Study

What is your primary destination for this trip? (Mark ONE) (n=501)

51.7% Leech Lake 19.0% Cass Lake 2.2% Lake Winnibigoshish 10.8% Walker 1.4% Bemidji 0.2% Deer River
0.0% Bena 14.8% Other

What is the primary reason that you made this trip to the Leech Lake area? (Mark ONE) (n=505)

| | | |
|-------------------------------------|------------------------------------|--------------------------------------|
| 0.6% Business | 81.0% Pleasure or recreation | 9.5% Own a vacation home in the area |
| 1.8% Combined business and pleasure | 59.2% Fishing | 6.5% Other _____ |
| 0.6% Just passing through | 6.6% Festival / special event:___ | |
| | 14.4% Visiting friends / relatives | |
| | (n=213) | |

Is this your first trip to the Leech Lake area? (Mark ONE) 12.7% Yes 87.3% No

How many trips have you taken to the Leech Lake area in the last year?

(n=460; M=2.7; S.D.=4.0) _____ Trips 1.0% Don't recall

How many years have you been coming to the Leech Lake area?

(n=453; M=15.3; S.D.=14.0) _____ Years 2.6% Don't recall

What was the first year you came to the Leech Lake area?

(n=453; M=1986; S.D.=15.7) 19 _____ 5.3% Don't recall

Below is a list of possible experiences that you may have had while visiting the Leech Lake area. Please look over the list of possible experiences **Indicate how important each experience was to you on your visit to the area.**

| Experience | Very unimportant | Unimportant | Neither/ Neutral | Important | Very important |
|---|------------------|-------------|------------------|-----------|----------------|
| To enjoy the scenery (n=500; <u>M</u> =4.3; S.D.=0.8) | 1 | 2 | 3 | 4 | 5 |
| To get away from the usual demands of life (n=500; <u>M</u> =4.4; S.D.=0.8) | 1 | 2 | 3 | 4 | 5 |
| To experience natural quiet (n=493; <u>M</u> =4.1; S.D.=0.9) | 1 | 2 | 3 | 4 | 5 |
| To be close to nature (n=500; <u>M</u> =3.9; S.D.=0.9) | 1 | 2 | 3 | 4 | 5 |
| To meet new people (n=487; <u>M</u> =2.7; S.D.=1.0) | 1 | 2 | 3 | 4 | 5 |
| To do something with the family (n=502; <u>M</u> =4.5; S.D.=0.8) | 1 | 2 | 3 | 4 | 5 |
| To view wildlife (n=488; <u>M</u> =3.6; S.D.=0.9) | 1 | 2 | 3 | 4 | 5 |
| To learn more about nature (n=496; <u>M</u> =3.0; S.D.=0.9) | 1 | 2 | 3 | 4 | 5 |
| To experience solitude (n=495; <u>M</u> =3.5; S.D.=1.1) | 1 | 2 | 3 | 4 | 5 |
| To learn more about the local culture (n=498; <u>M</u> =2.7; S.D.=0.9) | 1 | 2 | 3 | 4 | 5 |
| To learn about the cultural history of the area (n=498; <u>M</u> =2.8; S.D.=0.9) | 1 | 2 | 3 | 4 | 5 |

| On vacation, how interested are you in the following opportunities? | Extremely uninterested | Uninterested | Neutral | Interested | Extremely interested |
|---|------------------------|--------------|---------|------------|----------------------|
| Cultural arts demonstrations (i.e. birch bark baskets, etc.) (<i>n</i> =501; <i>M</i> =2.8; <i>S.D.</i> =1.0) | 1 | 2 | 3 | 4 | 5 |
| Traditional Native American dance performances (<i>n</i> =499; <i>M</i> =2.9; <i>S.D.</i> =1.0) | 1 | 2 | 3 | 4 | 5 |
| Traditional Native American story telling (<i>n</i> =487; <i>M</i> =2.8; <i>S.D.</i> =1.0) | 1 | 2 | 3 | 4 | 5 |
| Native American cultural heritage history center (<i>n</i> =496; <i>M</i> =2.9; <i>S.D.</i> =1.0) | 1 | 2 | 3 | 4 | 5 |
| Tours put on by an American Indian Tribe (<i>n</i> =496; <i>M</i> =2.8; <i>S.D.</i> =1.0) | 1 | 2 | 3 | 4 | 5 |
| Tribal gift shops (cultural art) (<i>n</i> =494; <i>M</i> =2.9; <i>S.D.</i> =1.0) | 1 | 2 | 3 | 4 | 5 |
| Wild rice processing plant tours (<i>n</i> =491; <i>M</i> =2.7; <i>S.D.</i> =1.0) | 1 | 2 | 3 | 4 | 5 |
| Fish hatchery tours (<i>n</i> =500; <i>M</i> =2.8; <i>S.D.</i> =1.0) | 1 | 2 | 3 | 4 | 5 |
| Winnie Ponds Fish & Wildlife Mgmt. self-guided tour (<i>n</i> =490; <i>M</i> =2.7; <i>S.D.</i> =1.0) | 1 | 2 | 3 | 4 | 5 |
| Fishing (<i>n</i> =502; <i>M</i> =4.1; <i>S.D.</i> =1.1) | 1 | 2 | 3 | 4 | 5 |
| Hunting (<i>n</i> =496; <i>M</i> =2.6; <i>S.D.</i> =1.3) | 1 | 2 | 3 | 4 | 5 |
| Wildlife viewing (<i>n</i> =499; <i>M</i> =3.7; <i>S.D.</i> =1.0) | 1 | 2 | 3 | 4 | 5 |
| Nature photography (<i>n</i> =500; <i>M</i> =3.2; <i>S.D.</i> =1.0) | 1 | 2 | 3 | 4 | 5 |

In the past year, while on vacation, have you visited or attended the following...(check all that apply) (*n*=398)

| | | |
|-------------------------------------|---|--|
| 50.3% Designated historic site | 42.7% Historic community or town | 35.7% History museum |
| 18.3% Historic military site | 20.4% Historic memorial or cemetery | 61.3% Art museum or gallery |
| 61.3% Antique shop, show or auction | 16.1% Ethnic area or community | 11.6% Ethnic culture exhibit or center |
| 24.6% Live theater performance | 12.6% Dance performance | 9.0% Classical music concert or opera |
| 30.9% Live musical concert | 16.1% Heritage, ethnic or folk festival or fair | 49.5% Other fair or festival |

How many people are in your travel party (including yourself)? _____ People (*n*=499; *M*=8.6; *S.D.*=8.4)

Are there any international visitors in your travel group? 1.8% Yes 98.2% No

How many total nights will you be away from home on this trip? _____ Nights (*n*=496; *M*=8.3; *Median*=7.0; *S.D.*=10.4)

How many of these nights will be in the Leech Lake area? _____ Nights (*n*=492; *M*=6.7; *Median*=7.0; *S.D.*=5.8)

If this is a day trip, how many hours will you be in the Leech Lake area? _____ Hours (*n*=32; *M*=5.4; *S.D.*=3.3)

What type of accommodation are you staying in? (*n*=496)

| | | |
|---------------------------------|--------------------------------|---|
| Bed & Breakfast | 9.1% Hotel / motel | 5.0% Vacation home of friend / relative |
| 4.0% Cabin rental | 2.0% Public/private campground | 8.3% Your own vacation home |
| 0.8% Casino hotel | 63.7% Resort | 2.0% Other _____ |
| 2.8% Home of friend or relative | 2.2% RV Park | |

Please estimate the amount of money YOU spent in Leech Lake area in the last 24 hours. If NONE, write "0."

| | | | |
|---|----------|---|----------|
| Lodging (n=268; $\underline{M}=\$192.12$; S.D.= $\$214.02$) | \$ _____ | Recreation / attractions / entertainment (n=93; $\underline{M}=\$54.09$; S.D.= $\$43.39$) | \$ _____ |
| Restaurant food / beverages (n=295; $\underline{M}=\$50.85$; S.D.= $\$40.88$) | \$ _____ | Guides / outfitting (n=9; $\underline{M}=\$28.67$; S.D.= $\$17.15$) | \$ _____ |
| Groceries (n=308; $\underline{M}=\$53.03$; S.D.= $\$44.81$) | \$ _____ | Casino (n=47; $\underline{M}=\$65.30$; S.D.= $\$62.60$) | \$ _____ |
| Transportation (gas, parking, repairs, etc.) (n=236; $\underline{M}=\$35.78$; S.D.= $\$26.42$) | \$ _____ | Other: _____ (n=21; $\underline{M}=\$42.33$; S.D.= $\$33.04$) | \$ _____ |
| Shopping (souvenirs, gifts, film, etc.) (n=199; $\underline{M}=\$61.01$; S.D.= $\$56.29$) | \$ _____ | | |
| Cultural arts (n=8; $\underline{M}=\$16.38$; S.D.= $\$23.45$) | \$ _____ | | |

If you have NOT been in Leech Lake for 24 hours, indicate the number of hours included in spending estimate _____ Hours
(n=26; $\underline{M}=8.2$; S.D.=6.9)

While planning this trip did you use any of the following information sources? (check all that apply) (n=396)

| | | |
|---|-------------------------------|--------------------------------|
| 14.3% Area tourism information (CVB, Chamber) | 1.9% Article/documentary/news | 2.2% Automobile Club |
| 52.7% Internet | 4.7% Newspaper/magazine ads | 31.9% Previous visit |
| 31.9% Recommendation from friend/relative | 2.5% Sports show | 7.7% State tourism information |
| 0.3% Travel agency | 5.2% Visitor/Welcome center | 8.8% Other _____ |

A few questions about you

Which best describes your household? (mark one) (n=498)

| | | | |
|----------------------------------|-------------------------------|---------------------------|------------------|
| 49.6% Couple (children under 18) | 32.3% Couple (grown children) | 7.0% Couple (no children) | 4.2% Other _____ |
| 2.8% Single (children under 18) | 1.6% Single (grown children) | 2.4% Single (no children) | |

What is the highest level of education you have completed? (n=496)

| | | |
|--------------------|-----------------------|-----------------------|
| 0.2% Eighth grade | 17.1% High school/GED | 10.1% Tech School |
| 14.7% Some college | 40.7% College degree | 17.1% Advanced degree |

What is your annual household income (before taxes)? (n=448)

| | | | |
|-------------------------|-------------------------|-----------------------|-----------------------|
| 0.9% Less than \$5,000 | 0.2% \$5,000-9,999 | 0.0% \$10,000-14,999 | 10.1% \$15,000-24,999 |
| 2.9% \$25,000-34,999 | 12.5% \$35,000-49,999 | 26.6% \$50,000-74,999 | 24.6% \$75,000-99,999 |
| 12.7% \$100,000-124,999 | 17.6% \$125,000 or more | | |

What is your gender? 37.7% Male 62.3% Female
(n=499)

What is your ethnicity? 1.0% Hispanic 99.0% Non-hispanic
(n=396)

What is your race? (check all that apply) (n=493)

| | | |
|--|-------------|--------------------------------|
| 1.4% American Indian or Alaska Native | 0.2% Asian | 0.6% Black or African American |
| 0.2% Native Hawaiian or other Pacific Islander | 97.0% White | 0.6% Other (Explain: _____) |

Are you enrolled in a Federally recognized tribe (U.S.)? 1.1% Yes 98.9% No (n=471)

Are you a Treaty enrolled member (Canada)? 0.2% Yes 99.8% No (n=456)

What year were you born? 19 _____
(Age: n=490; $\underline{M}=44.6$; S.D.=12.3)

What is your Zip Code _____