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TOURISM CENTER

Mille Lacs Area Visitor Profile: September 2014 – August 2015

Authored by Xinyi Qian, Ph.D.

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EXECUTIVE SUMMARY

In 2014, Mille Lacs County received funding for a profile of visitors to the Mille Lacs Lake area from fall 2014 through summer 2015. Below is a summary of findings for the year-round project (September 2014 through August 2015), based on 1530 survey responses.

RESPONDENTS

Fifty-eight percent of respondents were male, and approximately 28 percent were between the ages of 51 and 60. About 41 percent of respondents were baby boomers (born between 1946 and 1964), 33 percent were Generation X (born between 1965 and 1980), and close to 20 percent were millennials (born in or after 1981). The annual household income of more than 40 percent of respondents was in the range of $50,001-$100,000, followed by the $100,001-$150,000 range (24.3 percent). For each generation in every season, the most frequently identified income range was $50,001-$100,000. Additionally, about 28 percent of respondents had a bachelor's degree and another 25 percent had some college education. The majority of respondents were repeat visitors, as 63.6 percent made between one and ten visits to the Mille Lacs Lake area in the past 12 months, and 53 percent made between one and 20 visits in the past five years.

TRIP INFORMATION

The majority of respondents indicated the Mille Lacs Lake area was their primary destination (86 percent) and spent between one and three nights in the area (75.9 percent). There was no significant seasonal or generational difference in the number of nights spent in the Mille Lacs Lake area. The most frequently chosen lodging facility was one's own vacation home (22.3 percent), followed by hotel/motel (16.2 percent) and RV (15.5 percent). Nearly every respondent arrived in the Mille Lacs Lake area by car, van, or truck (94.7 percent). About 37 percent traveled in a group of two (37.4 percent). Approximately 36 percent traveled with family.

In terms of spending, the highest spending category was restaurant/bar, followed by lodging, transportation, and groceries. The average spending per person per day in the Mille Lacs Lake area was $94.68. Total spending per person per day is significantly higher in winter than in fall, spring, or summer. There was no significant generational difference in total spending per person per day.

TRIP ACTIVITIES, PURPOSE, AND PLANNING

The most frequently identified trip activity is dining out (73.4 percent), followed by fishing (53.8 percent), nightlife/evening entertainment (25.2 percent), and visiting friends/relatives (25 percent). Respondents most frequently indicated the primary reason for the trip was fishing (33.4 percent), followed by visiting family/friends (15.1 percent), and outdoor recreation other than fishing (13.9 percent).

More than half of respondents (54.3 percent) planned their trip less than two weeks in advance, and close to 18 percent (17.6 percent) planned their trip two to four weeks in advance. Friends and family were the most frequently used information source (48.2 percent), followed by area/destination website (20.1 percent).

IMPACT AND USE OF SOCIAL MEDIA

The majority of respondents (88.5 percent) did not change their original trip plans based on information found on social media. The two most frequently identified medium for sharing trip information were Facebook (54.8 percent) and text messages (37.4 percent).

INTRODUCTION

Consumer profile information is essential for tourism marketing and planning. In the Mille Lacs area, the most recent traveler information dated back to 2001 (Liu, 2001), and updated information about visitors' interests and experiences was needed. In 2014, Mille Lacs County received funding for a project to profile visitors to the Mille Lacs Lake area from fall 2014 to summer 2015. The county contracted with University of Minnesota Tourism Center to conduct the project. This summary report presents the methods and findings of the visitor profile project, which repeats several questions from the 2001 survey, but adds substantially to the understanding of visitors' activities, spending, travel group, travel planning, and information sharing behaviors.

METHODOLOGY

Trained staff administered on-site, in-person questionnaires to Mille Lacs Lake area visitors from September 1, 2014 to August 31, 2015, covering a 12-month period. Fall season includes September, October, and November 2014. Winter season includes December 2014, as well as January and February 2015. Spring includes March, April, and May 2015. Summer season includes June, July, and August 2015.

STUDY SETTING

Mille Lacs County, with a 2013 population of 25,833 residents, is located in Central Minnesota (U.S. Census Bureau, 2015). Boasting Mille Lacs Lake, Kathio and Father Hennepin State Parks, the Soo Line Trail-South, Wealthwood State Forest, and many other natural assets, the area is a major tourism destination in Minnesota.

SAMPLING

A convenience sample was designed to reach the breath of tourists visiting the Mille Lacs Lake area in different seasons. Based on discussion with Mille Lacs County and Mille Lacs Tourism Council, survey locations were distributed around the lake. Specifically, sample sites were located across eight communities: Garrison, Isle, Mille Lacs Band of Ojibwe, Onamia, Wahkon, Malmo, Cove, and Wealthwood. Data collection took place on Mondays, Fridays, Saturdays, and Sundays.

Sampling quotas for each community were constructed based upon 2013 lodging tax receipts. Mille Lacs County and Mille Lacs Tourism Council were consulted to provide specific sampling sites (e.g., attractions, lodging facilities, restaurants) and subsequently made contact with site management to ask for participation. Questionnaires were collected at a total of 31 sites and six events throughout the Mille Lacs Lake area (Appendix A). All questionnaires were administered in person by surveyors hired and trained by University of Minnesota Tourism Center.

APPROACHING AND SCREENING RESPONDENTS

Two screening questions assured each survey respondent was an adult tourist (Figure 1). For the purpose of this study, a tourist was anyone who traveled at least 50 miles from their primary residence to the area.

1. Do you live 50 miles or less to the Mille Lacs area? ❑ Yes (Thank/terminate) ❑ No (Continue)
2. Are you 18 years old or older? ❑ Yes (Continue) ❑ No (Ask if an adult is present; if no, terminate)

Fig. 1: Screening questions for potential respondents of the 2014 Mille Lacs Lake area visitor survey.

QUESTIONNAIRE

An onsite questionnaire was developed based on past research and with the assistance of Mille Lacs County and Mille Lacs Tourism Council. Questionnaire sections included trip motivation, spending, activities, accommodations, transportation, group composition, planning and information sources, and basic demographics.

RESPONSE RATE

Throughout the 12-month period of data collection, surveyors obtained a total of 1530 questionnaires from tourists.

More than 14 percent of questionnaires were collected in July, 12 percent in September, and close to 11 percent in May, June, and August (Figure 2). Nearly 40 percent were collected on Saturdays, 30 percent on Fridays, 26 percent on Sundays, and another 4 percent on Mondays (Figure 3). Close to 32 percent of questionnaires were collected in lodging facilities (including campgrounds) and 23 percent in restaurants (Figure 4). Ten percent were collected at gas stations and nine percent at outdoor recreational areas and bait shops each. Six percent were collected at festivals and five percent at public landing areas.

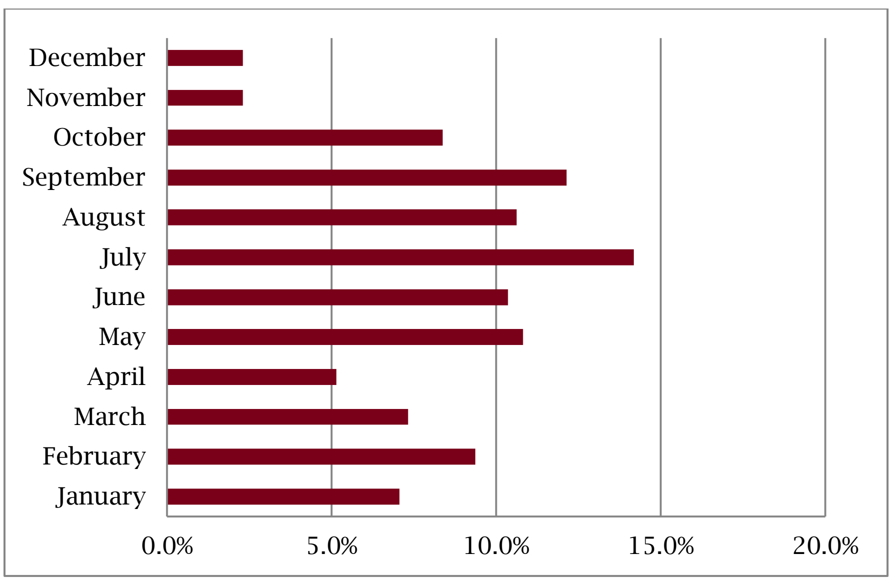

Fig. 2: Month respondents completed 2014 Mille Lacs Lake area visitor survey (n=1530).

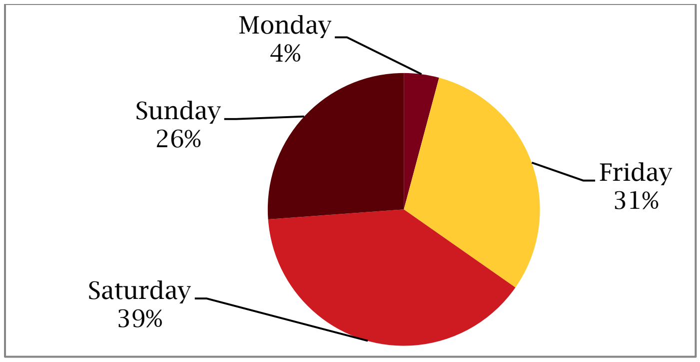

Fig. 3: Day of week respondents completed 2014 Mille Lacs Lake area visitor survey (n=1530).

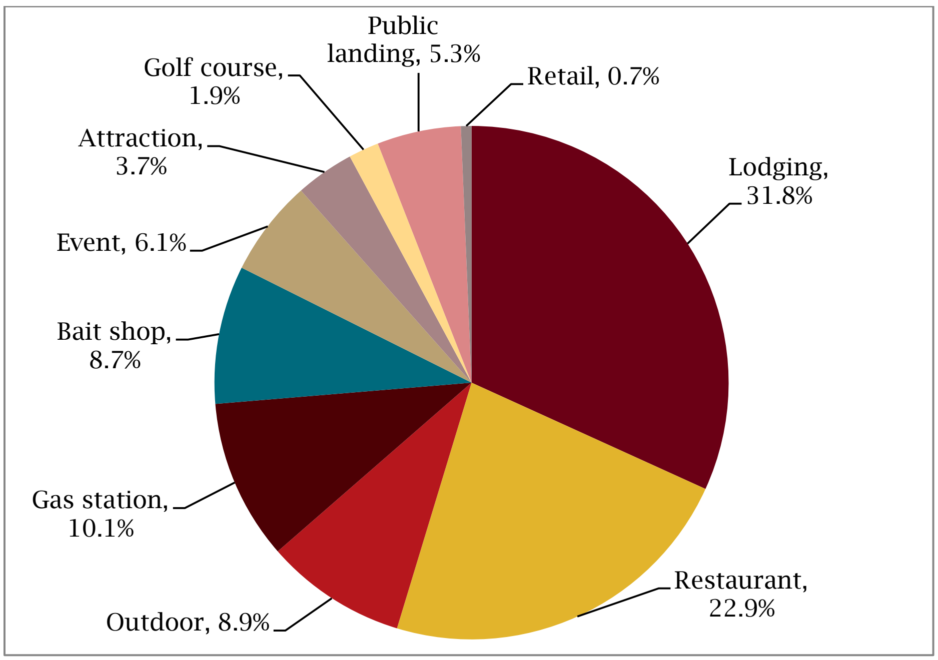

Fig. 4: Location where respondents completed 2014 Mille Lacs Lake area visitor survey (n=1530).

ANALYSIS

For each season, completed questionnaires were entered, cleaned, and checked in SPSS (version 23.0), a social science statistical analysis software. The four seasonal data files were merged into one file that includes data from all four seasons. Analysis provided frequencies, means[1], medians[2], and standard deviations[3] to describe the sample and provide information on variables of interest. Two-Factor Analysis of Variance (ANOVA) assessed whether there is generational or seasonal difference in the amount of per person per day spending and the number of nights spent in Mille Lacs. A customized trade area map was created based upon the zip codes of visitors' primary residence.

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[1] The mean of a data set is the average of all the data items.
[2] The median of a data set is the value in the middle when the data items are arranged from the smallest to the largest in value.
[3] The standard deviation of a data set is the positive square root of the variance. The variance is the average of the squared differences between each data item and the mean.

RESULTS

RESPONDENTS

Demographics

Fifty-eight percent of respondents were male (Figure 5). Respondents' average age was 48 years old (*M*=48.27, *Mdn*=49, *SD*=13.44)[4]. Approximately 28 percent of respondents were between the ages of 51 and 60, followed by the 41-50 (22.5 percent) and 31-40 (18.8 percent) age groups (Figure 6). Approximately 41 percent of respondents were baby boomers, and 33 percent were in Generation X (Figure 7). Close to 20 percent (18.4 percent) of respondents were millennials, and 7.9 percent were members of the greatest or the silent generation.

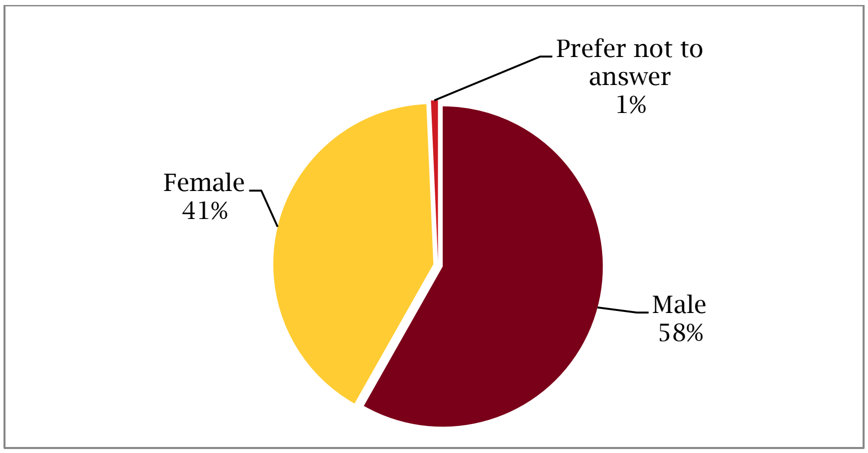

Fig 5: Gender of 2014 Mille Lacs Lake area visitor survey respondents (n=1422).

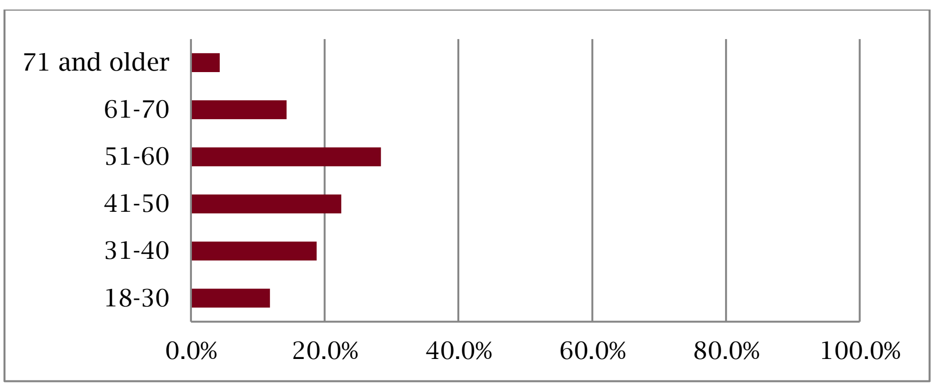

Fig. 6: Percentage of 2014 Mille Lacs Lake area visitor survey respondents in various age brackets (n=1452).

[4] M=Mean, Mdn=Median, SD=Standard Deviation.

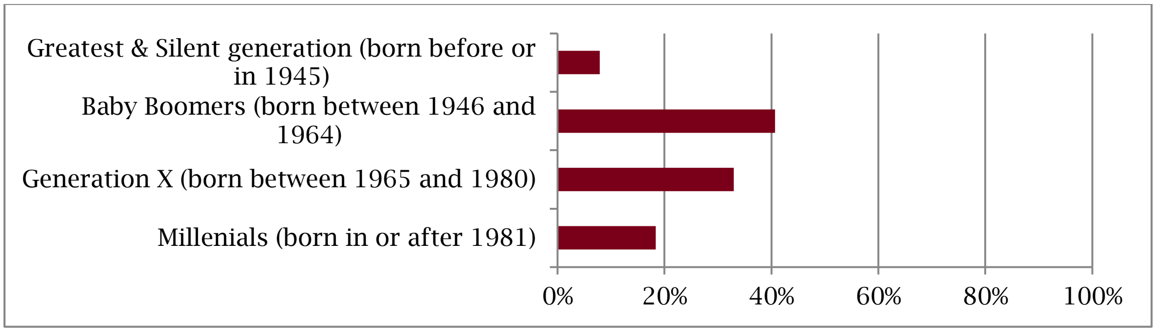

Fig. 7: Percentage of 2014 Mille Lacs Lake area visitor survey respondents in various generations (n=1497).

The household income of about 41 percent of respondents was in the $50,001-$100,000 range, followed by the $100,001-$150,000 range (24.3 percent; Figure 8). Close to 20 percent (18.4 percent) of respondents had a household income higher than $150,000, while 16.6 percent of respondents had a household income lower than $50,000. For each generation in every season, the most frequently identified income range was $50,001-$100,000 (Figure 9). The exception was millennials during the fall season—37.5 percent had an income less than $50,000, followed by 30 percent in the $50,001-$100,000 range. Additionally, for silent and greatest generations during winter and spring, there were as many in the $50,001-$100,000 range as those with an income of less than $50,000. Within the income range of $100,001-$150,000, the highest percentages of respondents were Gen X during fall and winter and baby boomers in spring and summer. Within the income range of more than $150,000, the highest percentages of respondents were Gen X in summer and spring and baby boomers during winter and summer.

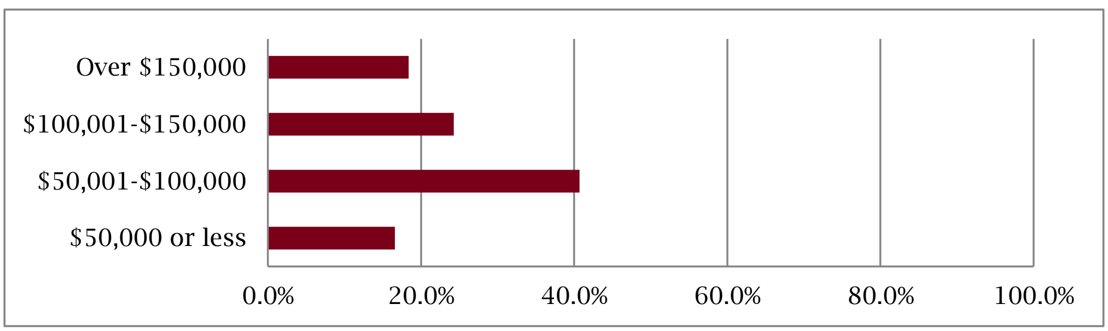

Fig. 8: Percentage of 2014 Mille Lacs Lake area visitor survey respondents in pre-tax income groups (n=1339).

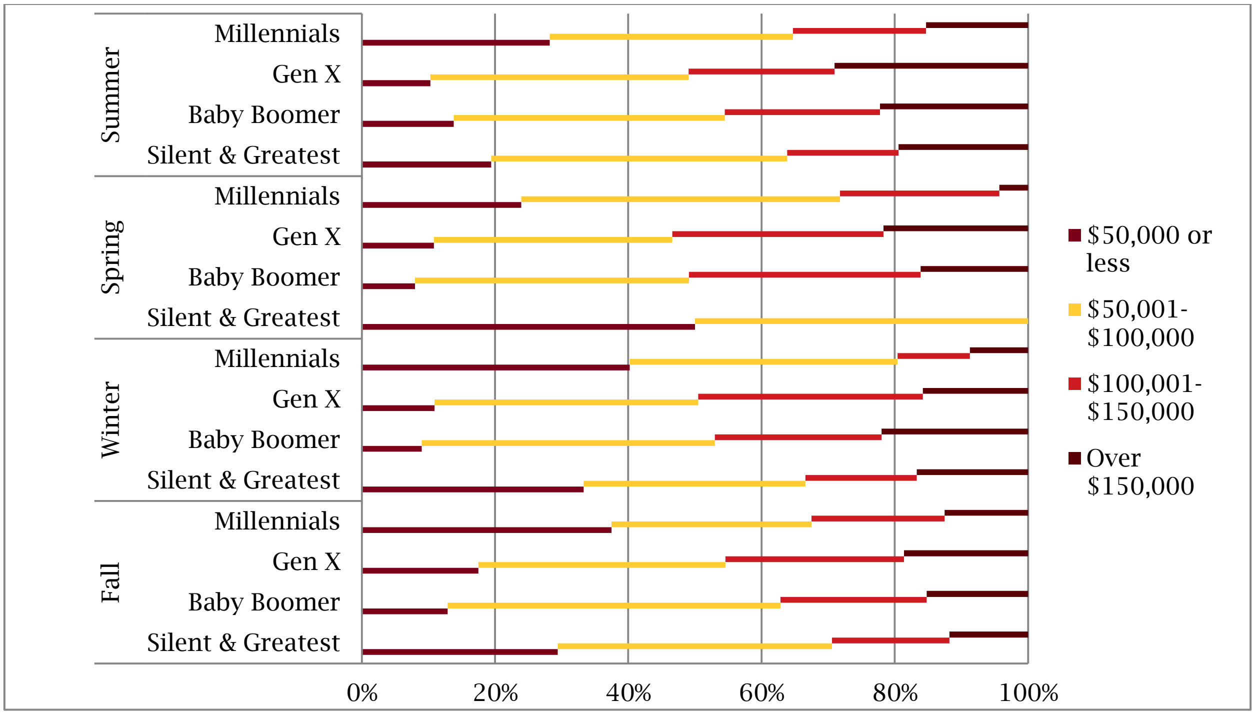

Fig. 9: Percentage of 2014 Mille Lacs Lake area visitor survey respondents in pre-tax income groups, by season and generation (n=1339).

In terms of education level, about 26 percent of respondents had a bachelor's degree, and another 25 percent had some college education (Figure 10). Approximately 19 percent were high school graduates, 15.4 percent had an associate's degree, and another 14.6 percent attended post-graduate or professional school.

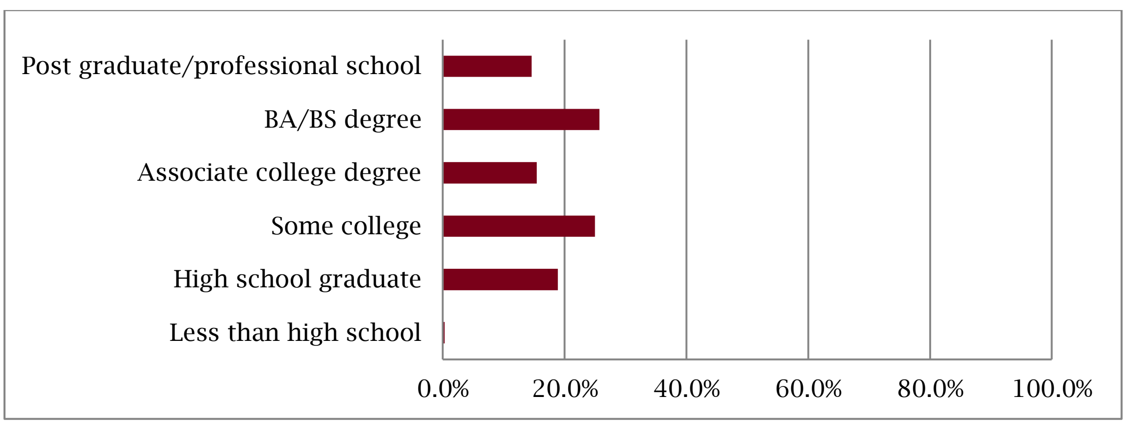

Fig. 10: Education level of respondents to 2014 Mille Lacs Lake area visitor survey (n=1452).

Primary residence

Approximately 92 percent of respondents resided in the state of Minnesota, as indicated by a centroid analysis of zip codes regarding respondents' primary residence (Figure 11). A little more than two percent of respondents came from Wisconsin (2.18 percent; Table 1), 1.12 percent from Iowa, and 0.7 percent from North Dakota. The Minneapolis-St. Paul Core Based Statistical Area (CBSA), which encompasses an 11-county area in Minnesota and Wisconsin, was home to 73.82 percent of respondents, followed by St. Cloud, MN (4.21 percent), Rochester, MN (1.75 percent), and Brainerd, MN (1.26 percent; Table 1).

Table 1: Primary place of residence of 2014 Mille Lacs area visitor survey respondents (n=1425).

Top 4 states		Top 4 Core Based Statistical Areas (CBSA)	
State	**Percent (%)**	**CBSA**	**Percent (%)**
Minnesota	92.21	Minneapolis-St. Paul-Bloomington, MN-WI	73.82
Wisconsin	2.18	St. Cloud, MN	4.21
Iowa	1.12	Rochester, MN	1.75
North Dakota	0.70	Brainerd, MN	1.26

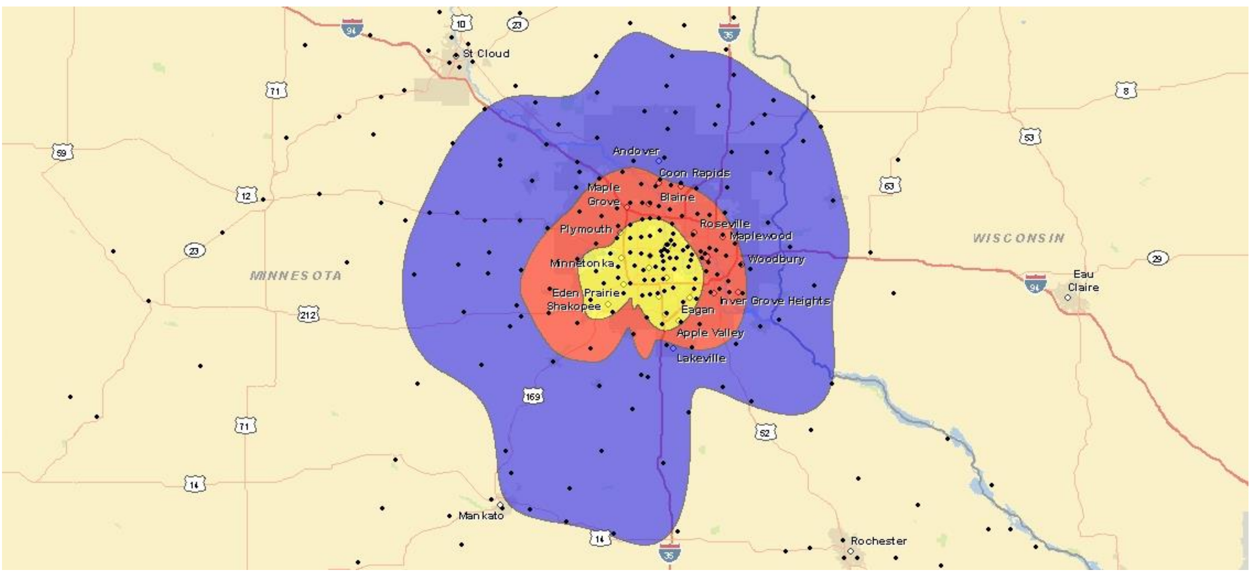

Fig. 11: Trade area of 2014 Mille Lacs Lake area visitor survey respondents (n=1425).

Past visitation

Respondents made a median of four visits to the Mille Lacs area in the past 12 months and a median of 15 visits in the past five years (Table 2). Specifically, 8.1 percent of respondents made no previous visit to the Mille Lacs Lake area in the past 12 months, 18.7 percent made one visit, and 12.4 percent made two visits (Figure 12). Sixteen percent made between three and five trips in the past 12 months, 16.5 percent made between six and ten visits, and 14.5 percent made between 11 and 20 visits. Close to 14 percent of respondents made more than 20 visits to the area in the past 12 months.

Seven percent of respondents made no previous visit in the past five years, 28.9 percent made between one and five visits, and another 11.8 percent made between six and ten visits (Figure 13). More than 12 percent of respondents made between 11 and 20 visits to the area in the past five years, and another 7.7 percent made between 21 and 30 visits. Approximately ten percent made between 31 and 50 visits in the past five years, and close to 22 percent made more than 50 visits.

Table 2: Descriptive statistics of past visitation by respondents to 2014 Mille Lacs Lake area visitor survey.

	Mean	Median	Standard Deviation
Number of visits in past 12 months (n=1415)	9.58	4	12.11
Number of visits in past 5 years (n=1182)	36.45	15	51.29

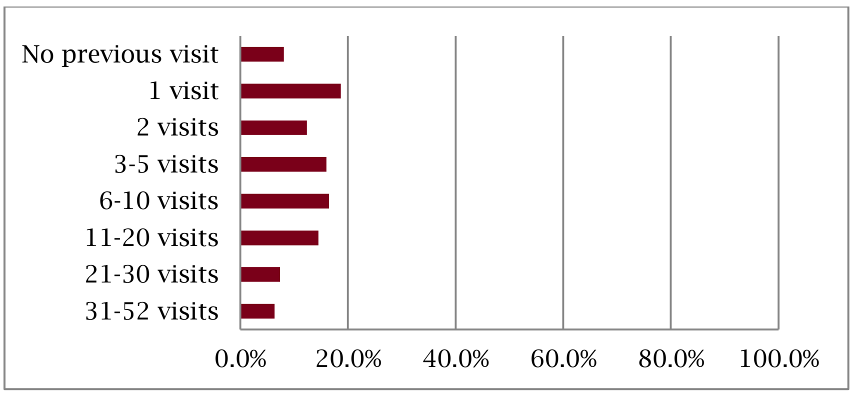

Fig. 12: Number of visits in past 12 months by respondents to 2014 Mille Lacs Lake area visitor survey (n=1415).

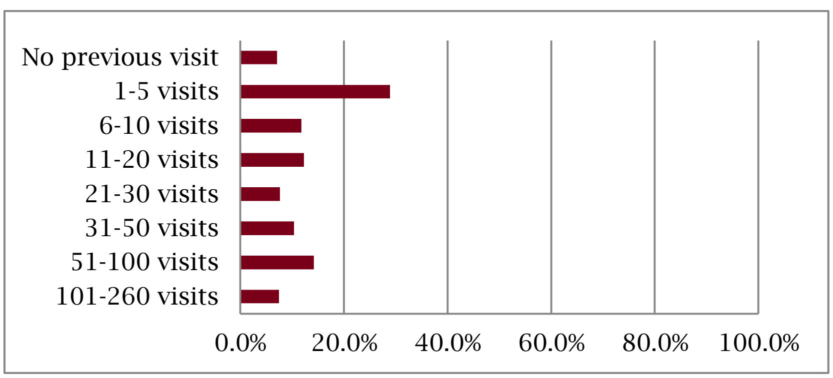

Fig. 13: Number of visits in past five years by respondents to 2014 Mille Lacs Lake area visitor survey (n=1182).

TRIP INFORMATION

Primary destination

The Mille Lacs Lake area was the primary destination for 85 percent of respondents (Figure 14). Among those whose final destination was not Mille Lacs, the Itasca area (19 percent) was the most frequently identified, followed by the Aitkin area (14.4 percent) and the Brainerd-Cuyuna area (12.6 percent; Appendix B). Cross Lake and the Twin Cities metro area were each identified by 6.3 percent of respondents. Respondents also named a large number of final destinations, but none was mentioned by more than four percent of respondents.

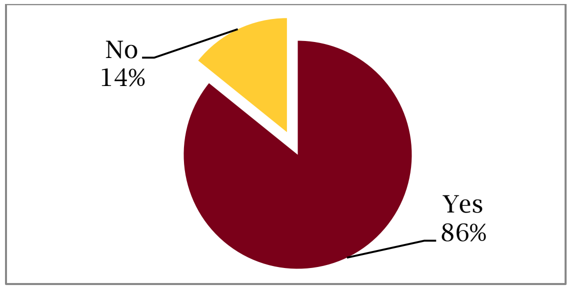

Fig. 14: Percentage of respondents indicating Mille Lacs Lake area was the primary destination (n=1486).

Trip duration

About 47 percent of respondents spent two nights on the entire trip, followed by 16.1 percent spending three nights and 15.4 percent spending one night (Figure 15). Meanwhile, close to ten percent took a day trip, while another 6.1 percent spent four or five nights on the entire trip. No more than 6 percent of respondents spent more than five nights on the entire trip.

A little more than 44 percent of respondents spent two nights in the Mille Lacs Lake area, followed by 16.1 percent spending one night and15.3 percent spending three nights in the area (Figure 16). There were also 14.6 percent of respondents who did not stay overnight in the Mille Lacs area. A little more than five percent of respondents spent four or five nights in the area, and 4.2 percent spent more than five nights in the area.

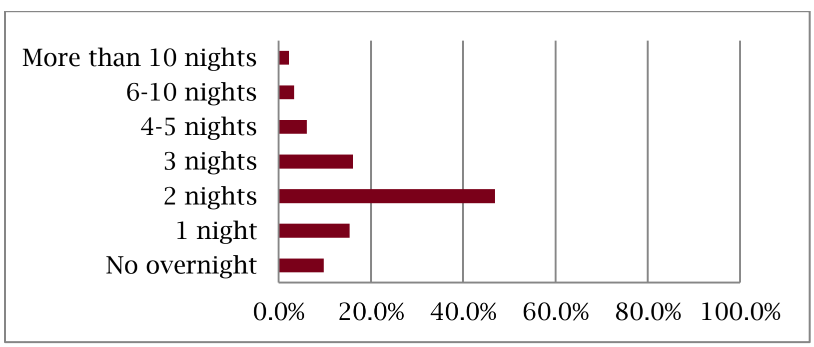

Fig. 15: Total number of nights spent on the trip by respondents to 2014 Mille Lacs Lake area visitor survey (n=1513).

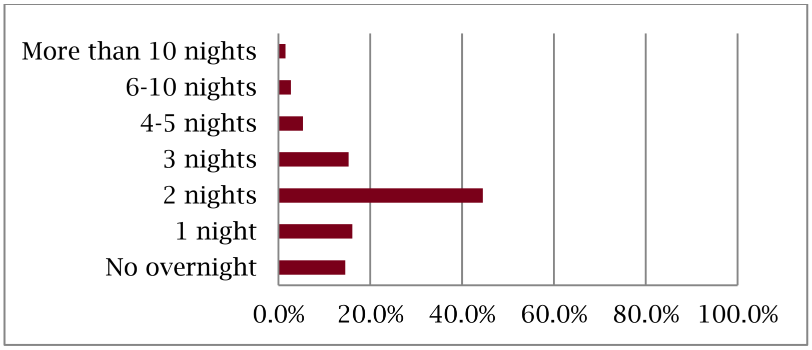

Fig. 16: Number of nights spent in Mille Lacs Lake Area by respondents to 2014 Mille Lacs Lake area visitor survey (n=1456).

Two-factor ANOVA analysis did not find any significant difference in the number of nights spent in Mille Lacs by season (F=0.40, p=0.75), by generation (F=1.20, p=0.31), or by season-generation interaction (F=0.39, p=0.94).

Silent and greatest generations spent about five days in Mille Lacs during fall and summer, and close to two days in winter and spring (Figure 17). Baby boomers spent about four days in the area in fall and spring, three days in summer, and close to two days in winter. Gen X spent about two days in the area across all four seasons. Millennials spent fewer than two days in the area in fall, and about two days in winter, spring, and summer.

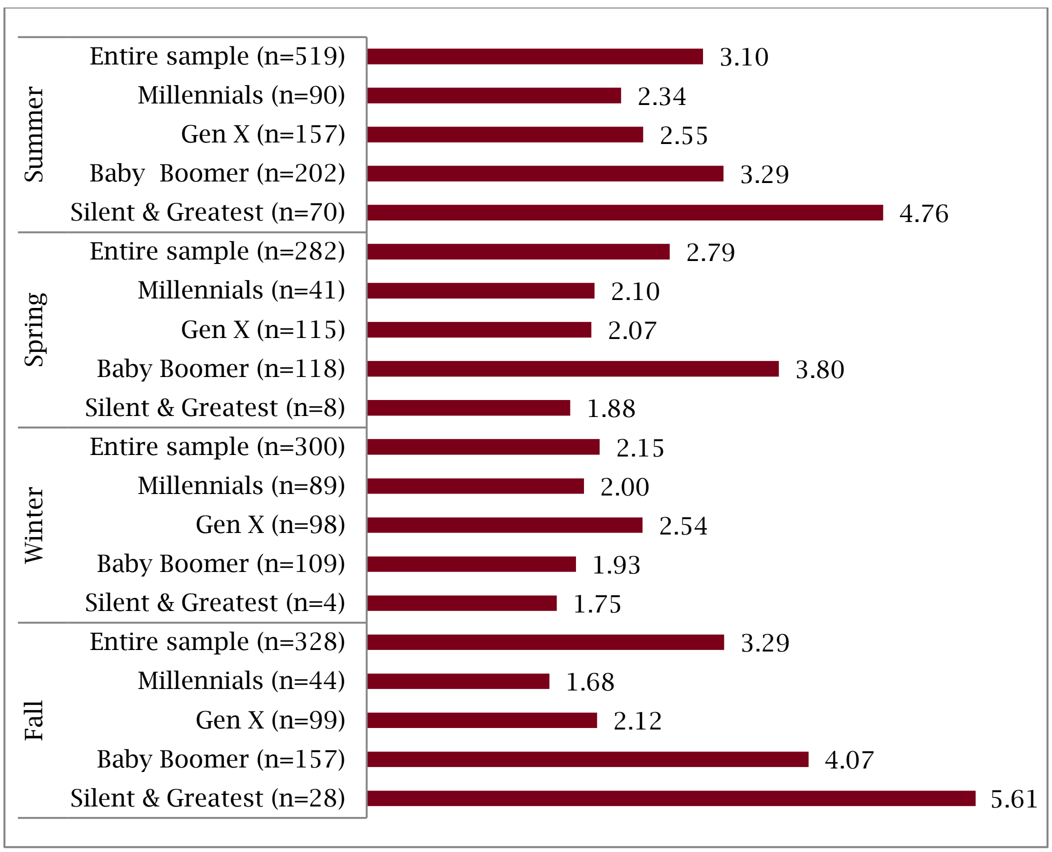

Fig. 17: Number of nights spent in Mille Lacs Lake area by respondents to 2014 Mille Lacs Lake area visitor survey, by season and generation (n=1456).

Lodging

About 22 percent of respondents stayed in their own vacation home, which was the most frequently chosen lodging type (Figure 18). Sixteen percent of respondents stayed in a hotel or motel, while 15.5 percent used an RV as a lodging facility. Close to 13 percent stayed in a resort or commercial cabin, and another 12.5 percent stayed in a fish house. Close to seven percent of respondents stayed in the vacation home of friend/relative, 6.1 percent staying in a tent, and another 5.6 percent stayed in the home of a friend/relative. Close to two percent of respondents stayed in a vacation rental by an owner, and only 0.4 percent stayed in bed and breakfasts.

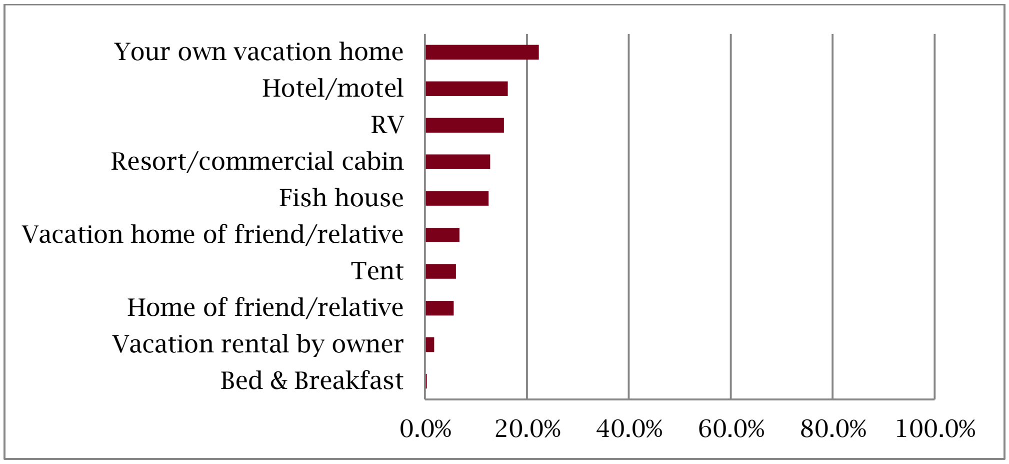

Fig. 18: Lodging type among overnight respondents to 2014 Mille Lacs Lake area visitor survey (n=1330).

Transportation

The majority of respondents arrived in the Mille Lacs Lake area by car, van, or truck (94.7 percent; Figure 19). Three percent arrived by RV/camper, and another 1.2 percent arrived by motorcycle.

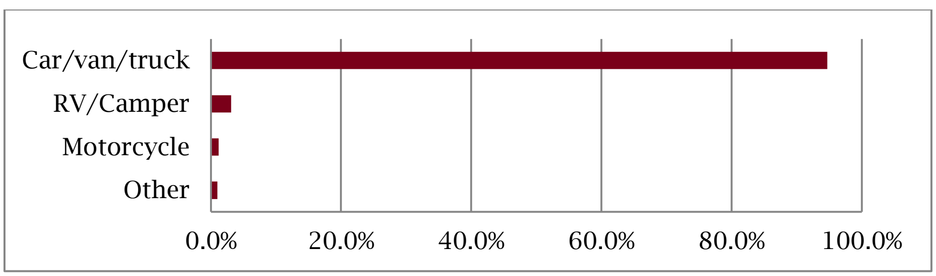

Fig. 19: Primary mode of transportation among respondents to 2014 Mille Lacs Lake area visitor survey (n=1487).

Group composition and size

The average respondent traveled in a group of four people (*M*=3.93, *Mdn*=3, *SD*=4.43). About 37 percent traveled in a group of two people (37.4 percent; Figure 20). Sixteen percent traveled in a group of four people, and another 13.4 percent in a group of three people. Close to 12 percent of respondents traveled in a group of six to ten people, while 11 percent traveled alone.

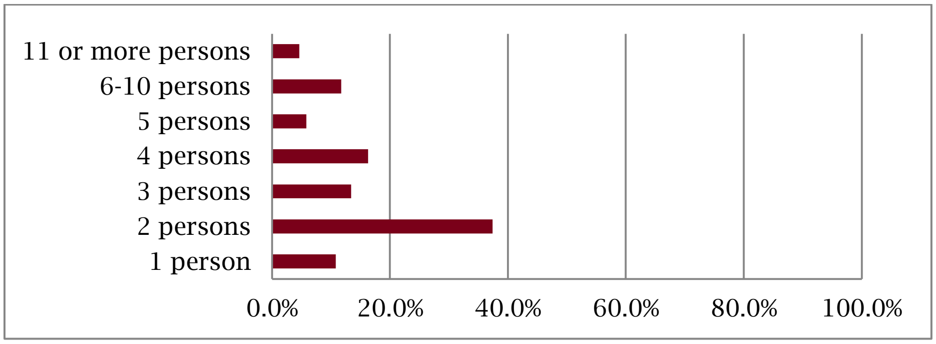

Fig. 20: Travel group size of respondents to 2014 Mille Lacs Lake area visitor survey (n=1523).

Approximately 36 percent of respondents traveled with family, 26 percent as a couple or with a partner, and 15.2 percent with friends (Figure 21). About 13 percent of respondents traveled with family and friends, while another eight percent traveled alone.

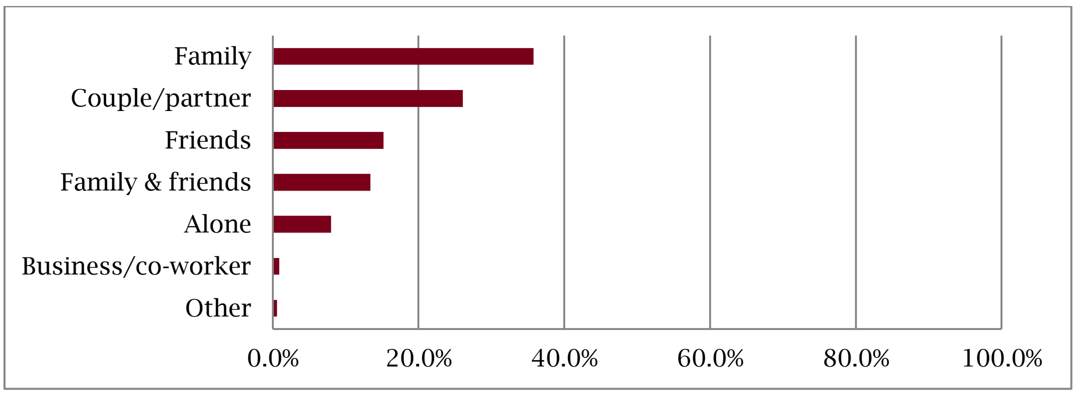

Fig. 21: Travel group composition of respondents to 2014 Mille Lacs Lake area visitor survey (n=1520).

Close to half (47.2 percent) of respondents traveled with adults in the 51-69 age range, and 44.4 percent traveled with adults in the 36-50 age range (Figure 22). Close to 28 percent of respondents (27.8 percent) traveled with children under 18 years old, while another 24.2 percent traveled with adults between the ages of 26 and 35. Close to 14 percent of respondents (13.8) traveled with adults in the 18-25 age range, and 8.6 percent traveled with adults older than 70.

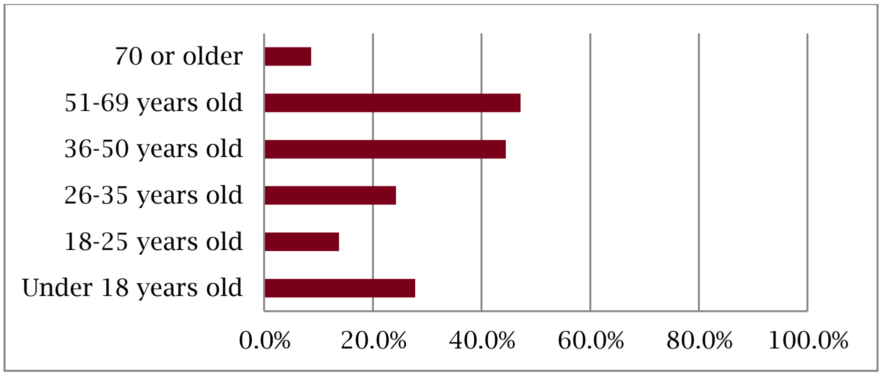

Fig. 22: Age groups included in 2014 Mille Lacs Lake area visitor survey respondents' travel party (n=1530).

Visitor spending

The average respondent spent the most on restaurants/bars, followed by lodging and transportation (Table 3). Specifically, the average respondent spent $22.49 at restaurants/bars (*M*=22.49, *Mdn*=15, *SD*=29.12), about $22 on lodging (*M*=21.97, *Mdn*=0, *SD*=59.25), $14 on transportation (*M*=14.01, *Mdn*=6.67, *SD*=21.02), and $11.81 on groceries (*M*=11.81, *Mdn*=0.00, *SD*=21.41) per day. There was no separate spending category for casino gaming. The average total personal spending within a 24-hour period is $94.68 (*M*=94.68, *Mdn*=63.75 *SD*=112.46).

Table 3: Descriptive statistics of spending per person per day in various categories by respondents to 2014 Mille Lacs Lake area visitor survey (n=1527).

	Mean ($)	Median ($)	Standard Deviation
Restaurant/bar	22.49	15.00	29.12
Lodging	21.97	0.00	59.25
Transportation	14.01	6.67	21.02
Groceries	11.81	0.00	21.41
Fishing-related equipment	6.73	0.00	40.16
Recreation	4.57	0.00	25.79
Shopping	4.52	0.00	18.71
Miscellaneous	4.47	0.00	19.41
Other fishing-related expense	2.22	0.00	11.74
Fishing-related guide service	1.88	0.00	11.33
Total	94.68	63.75	112.46

Total spending per person per day differed significantly across the seasons (F=2.93, p<0.05; Figure 23). Specifically, total spending per person per day is significantly higher in winter than in fall, spring, or summer. There was no significant generational difference in total spending per person per day (F=0.54, p=0.65), nor was there season-generation interaction effect (F=1.51, p=0.14).

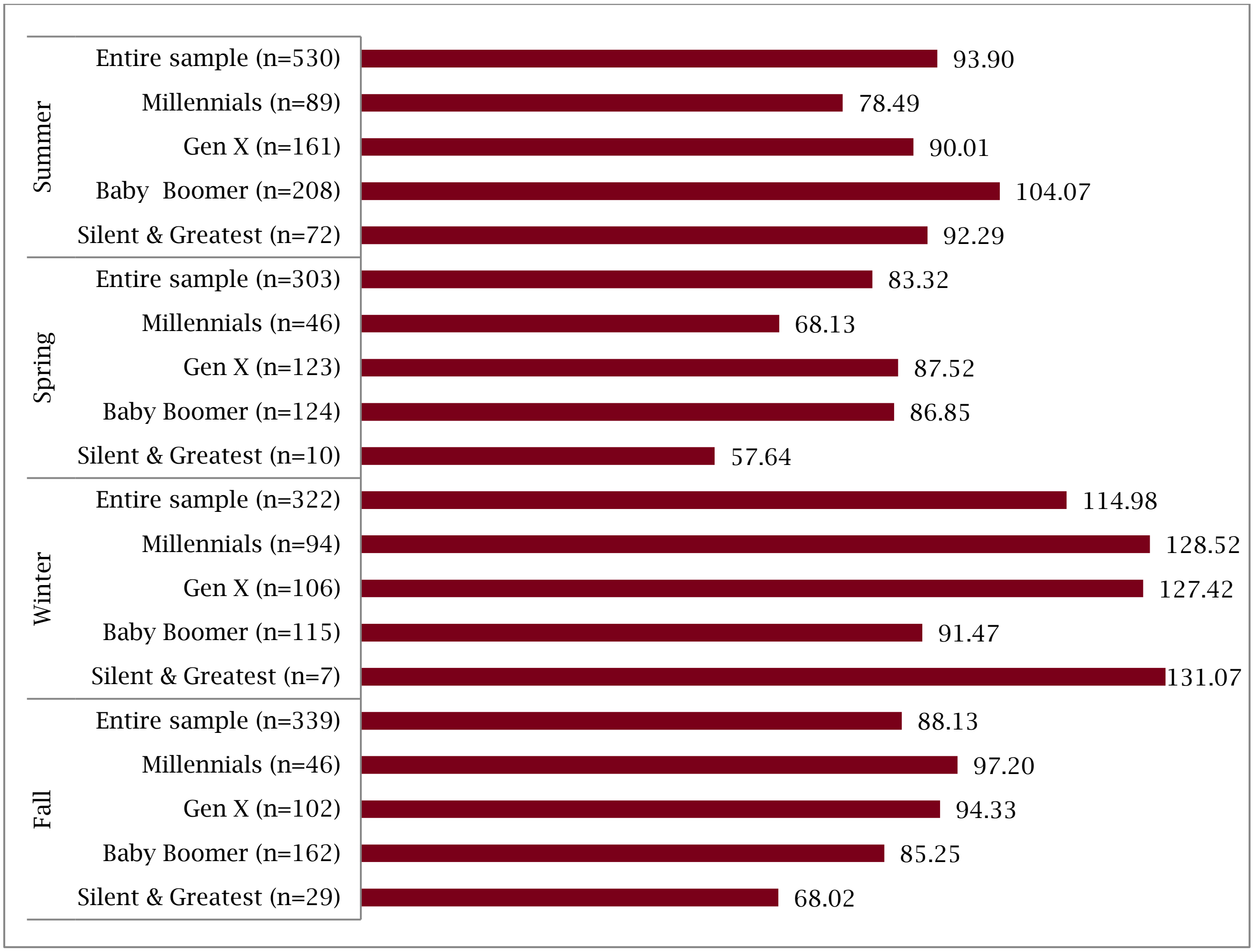

Fig. 23: Descriptive statistics of total spending per person, per day, by respondents to 2014 Mille Lacs Lake area visitor survey, by season and generation (n=1527).

TRIP ACTIVITIES

Respondents participated in a variety of activities during their trip to the Mille Lacs Lake area (Figure 24). Their most frequent activity was dining out (73.4 percent), followed by fishing (53.8 percent). One quarter of respondents reported nightlife/evening entertainment (25.2 percent) and visiting friends/relatives (25 percent). Twenty percent participated in sightseeing, and 17 percent visited state parks. Approximately 15 percent attended festivals/events (15.9 percent), drove on designated scenic byways (14.7 percent), and participated in boating/sailing (14.8 percent) and casino gaming (13.4 percent). It is worth remembering that boating/sailing is a three-season rather than year-round activity and that visiting state parks is mostly three-season. Other three-season activities are biking (8.4 percent) and golfing (6.1 percent). In terms of summer activities, 4.4 percent of respondents participated in canoeing/kayaking, but only 0.5 percent participated in sailboarding. When it comes to winter activities, 2.9 percent participated in snowmobiling, 0.8 percent in cross-country skiing, and 0.4 percent in snowshoeing.

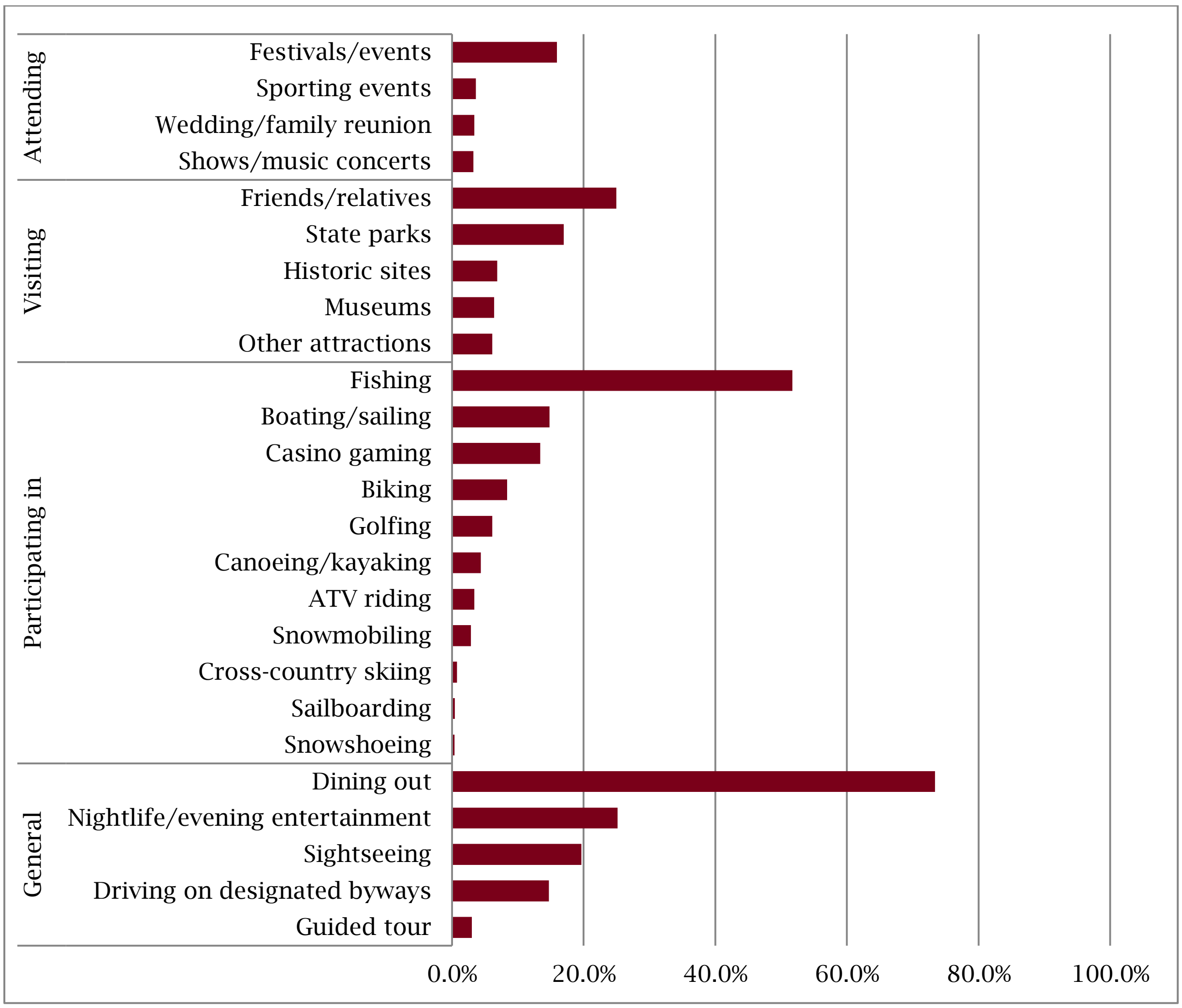

Fig. 24: Activities participated in among 2014 Mille Lacs Lake area visitor survey respondents (n=1530).

According to Table 4, there seems to be some nominal (not statistically significant) differences in activity participation across seasons and generations. The most frequently participated in activity across all seasons and generations was dining out, with the highest participation rate in winter for all generations. Meanwhile, millennials had the lowest participation in dining out in spring and summer. Fishing was most frequently participated in by baby boomers, Gen X, and millennials in winter, as well as by millennials in summer. The silent and greatest generations had a low participation rate in fishing across all seasons. Meanwhile, the silent and greatest generations frequently identified visiting friends and family as an activity in spring and fall, while a low percentage of millennials visited friends and family in fall and winter. Gen X and millennials were most likely to participate in nightlife/evening entertainment in winter and spring, but less likely to do so in summer. All generations were most likely to participate in sightseeing in the fall. The silent and greatest generations were most likely to visit state parks in fall, while Gen X and millennials were most likely to do so in summer. The silent and greatest generations were most likely to participate in casino gaming in fall and spring, but not in winter. Gen X was the least likely to participate in casino gaming across all seasons. The silent and greatest generations were most likely to drive on scenic byways in summer and fall, followed by boomers in the fall, millennials in the spring, and Gen X in the winter. All generations were most likely to attend festivals/events in the summer, while high percentages of boomers and millennials also did in winter. Boating/sailing had the highest participation rate across all generations in the summer.

Table 4: Ten most frequently participated in activities among 2014 Mille Lacs Lake area visitor survey respondents, by season and generation (n=1530).

		Dining out	Fishing	Visiting friends / relatives	Nightlife/evening entertainment	Sightseeing	Visiting state parks	Casino gaming	Driving on Scenic Byways	Festival / event	Boating / sailing
Fall	Silent & Greatest	65.5%	37.9%	37.9%	17.2%	37.9%	34.5%	27.6%	20.7%	6.9%	13.8%
	Baby Boomer	74.1%	37.0%	22.2%	21.0%	30.9%	22.8%	11.1%	19.1%	6.8%	18.5%
	Gen X	78.4%	45.1%	32.4%	26.5%	26.5%	16.7%	10.8%	15.7%	9.8%	17.6%
	Millennials	65.2%	39.1%	15.2%	19.6%	28.3%	13.0%	15.2%	13.0%	6.5%	19.6%
Winter	Silent & Greatest	71.4%	28.6%	0.0%	14.3%	14.3%	14.3%	0.0%	14.3%	14.3%	0.0%
	Baby Boomer	81.7%	62.6%	22.6%	26.1%	7.0%	6.1%	10.4%	11.3%	20.0%	0.0%
	Gen X	84.9%	72.6%	20.8%	35.8%	7.5%	3.8%	7.5%	17.0%	17.9%	0.0%
	Millennials	89.4%	74.5%	12.8%	46.8%	6.4%	2.1%	19.1%	10.6%	23.4%	0.0%
Spring	Silent & Greatest	70.0%	30.0%	60.0%	10.0%	20.0%	0.0%	30.0%	10.0%	0.0%	0.0%
	Baby Boomer	69.4%	40.3%	22.6%	18.5%	21.0%	13.7%	21.0%	13.7%	8.9%	0.0%
	Gen X	72.4%	42.3%	27.6%	31.7%	16.3%	14.6%	12.2%	7.3%	13.8%	0.0%
	Millennials	58.7%	52.2%	26.1%	28.3%	23.9%	19.6%	15.2%	17.4%	15.2%	0.0%
Summer	Silent & Greatest	72.2%	38.9%	27.8%	23.6%	25.0%	20.8%	20.8%	22.2%	20.8%	20.8%
	Baby Boomer	79.3%	50.5%	29.3%	21.6%	17.8%	15.9%	14.9%	16.3%	23.1%	34.6%
	Gen X	60.7%	54.6%	27.6%	19.6%	22.1%	30.7%	7.4%	15.3%	20.2%	28.8%
	Millennials	56.7%	72.2%	23.3%	22.2%	25.6%	34.4%	11.1%	8.9%	20.0%	35.6%

When asked about their favorite activities in the Mille Lacs area, 44.2 percent of respondents identified fishing, distantly followed by boating (10.5 percent; Appendix C). Eight percent of respondents identified casino/gambling and dining out as their favorite activities. About seven percent identified camping and the lake/lake area (6.7 percent) as their favorite activities. Approximately five percent identified shopping (5.3 percent), sightseeing (4.9 percent), golfing (4.7

percent) and state parks (4.7 percent) as their favorite activities. About four percent identified swimming (4.5 percent), bar/nightlife (4.2 percent), and ATV/four-wheeling (3.9 percent).

Respondents also identified a variety of tourism activities or attractions they would like to have in the Mille Lacs area but are currently not available. The most frequently mentioned was better fishing management/increasing fish slot (19.3 percent; Appendix D). Close to six percent of respondents mentioned better/more shopping (5.8 percent), *better* dining options (5.6 percent), and walleye fishing (5.6 percent). Approximately five percent of respondents mentioned *more* dining options (5.2 percent). Close to four percent mentioned better fishing, golf or mini golf (3.8 percent), water park/splash pad/pool (3.8 percent), and family fun/children activities (3.6 percent).

TRIP PURPOSE AND PLANNING

Primary reason for making trip

Respondents most frequently indicated the primary reason for their trip was fishing (33.4 percent), followed by visiting family/friends (15.1 percent), and outdoor recreation other than fishing (13.9 percent; Figure 25). Eight percent of respondents identified cabin/second home as the primary reason for their trip, and another six percent identified festival/event. Five percent of respondents passed through Mille Lacs. No other reason was identified by more than four percent of respondents.

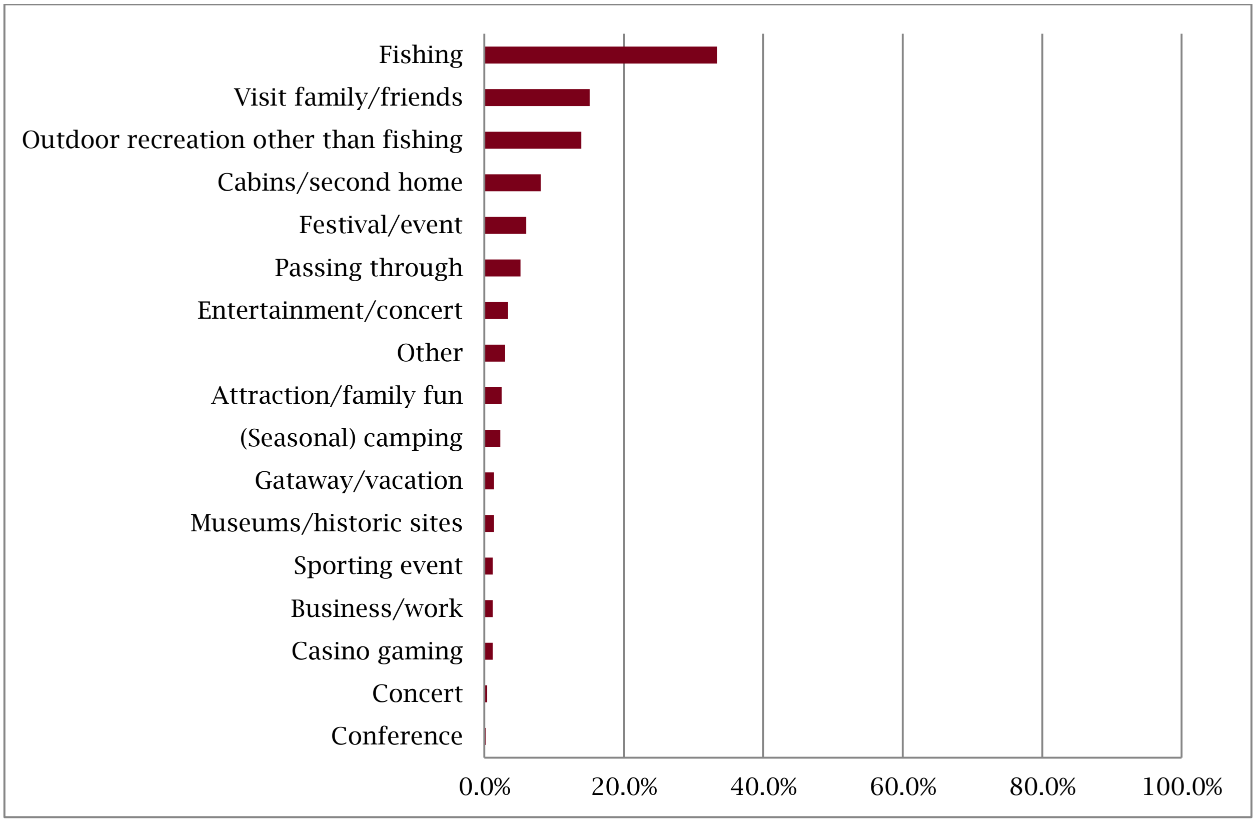

Fig. 25: Primary reason for making the trip among respondents to Mille Lacs Lake area visitor survey (n=1377).

According to Table 5, there seems to be nominal (not statistically significant) differences in the primary reason to make the trip across seasons and generations. Fishing is the most frequently identified primary reason to visit the Mille Lacs area (Table 5). Specifically, all generations were most likely to identify ice fishing as the primary reason to visit in the winter. Additionally, the highest percentage of millennials identified fishing as the primary reason to visit in spring and summer. All generations were most likely to identify visiting family and friends as the primary reason to visit in summer than in any other seasons. The same reason was also frequently identified by baby boomers in spring and the silent and greatest generations in fall. All generations were most likely to identify outdoor recreation, other than fishing, as the primary reason to visit in the fall, while high percentages of Gen X and millennials also identified the same reason for visiting in the summer. High percentages of silent and greatest generations identified festivals or events as the primary reason to visit in the winter and summer, as did millennials in the fall.

Table 5: Top five primary reasons for making the trip among respondents to Mille Lacs Lake area visitor survey, by season and generation (n=1377).

		Fishing	Visit family/friends	Outdoor recreation other than fishing	Cabin / second home	Festival/event
Fall	Silent & Greatest	21.4%	17.9%	21.4%	3.6%	3.6%
	Baby Boomer	26.9%	13.5%	23.7%	9.0%	1.9%
	Gen X	37.4%	12.1%	23.2%	2.0%	4.0%
	Millennials	33.3%	4.4%	22.2%	2.2%	11.1%
Winter	Silent & Greatest	28.6%	0.0%	0.0%	14.3%	14.3%
	Baby Boomer	51.9%	10.6%	2.9%	10.6%	3.8%
	Gen X	68.1%	6.4%	2.1%	2.1%	2.1%
	Millennials	70.5%	4.5%	3.4%	0.0%	6.8%
Spring	Silent & Greatest	10.0%	10.0%	10.0%	0.0%	10.0%
	Baby Boomer	17.1%	19.8%	7.2%	23.4%	4.5%
	Gen X	23.4%	15.9%	8.4%	6.5%	9.3%
	Millennials	37.5%	12.5%	5.0%	2.5%	5.0%
Summer	Silent & Greatest	21.7%	23.3%	16.7%	11.7%	11.7%
	Baby Boomer	25.0%	22.8%	15.0%	12.8%	7.2%
	Gen X	20.1%	19.4%	23.6%	6.9%	6.9%
	Millennials	28.0%	20.0%	20.0%	5.3%	9.3%

When asked where they would go if they could not go to the Mille Lacs area for their primary activity, 11 percent identified the Itasca area, followed by “another” area/park/campground/lake/festival (8.4 percent) and the Brainerd-Cuyuna area (8 percent; Appendix E). Approximately six percent identified the Duluth-Two Harbors area (6.1 percent), the Twin Cities area (5.7 percent), and Lake of the Woods (5.6 percent). A little more than 4 percent identified somewhere in Wisconsin (4.5 percent), Northern Minnesota/North Shore (4.5 percent), and Red Lake (4.4 percent).

Trip planning timeframe and information sources

More than half of respondents (54.3 percent) planned their trip less than two weeks in advance (Figure 26). Close to 18 percent (17.6 percent) planned their trip two to four weeks in advance, and another 10.9 percent planned their trip five to eight weeks in advance. Seven percent planned their trips nine to 13 weeks in advance, and ten percent planned their trip more than 13 weeks in advance.

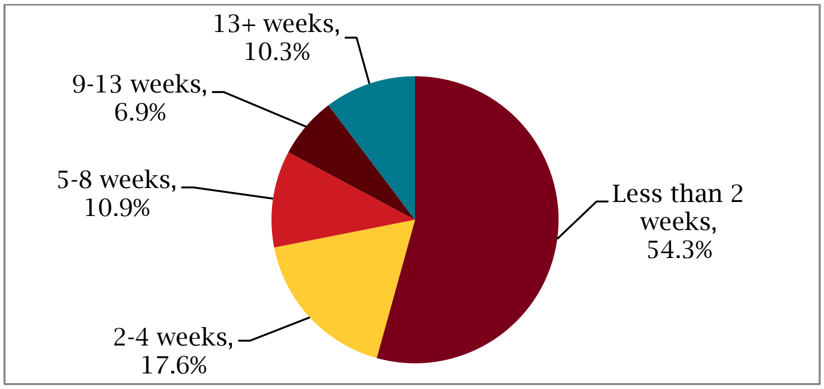

Fig. 26: Trip planning timeframe among respondents to Mille Lacs Lake area visitor survey (n=1426).

Overall, the trip planning timeframe was short. Across all generations in each season, the highest percentage of survey respondents planned their trip less than two weeks in advance (Figure 27). Close to a quarter of Gen X in winter and summer as well as Millennials in spring planned their trip two to four weeks in advance.

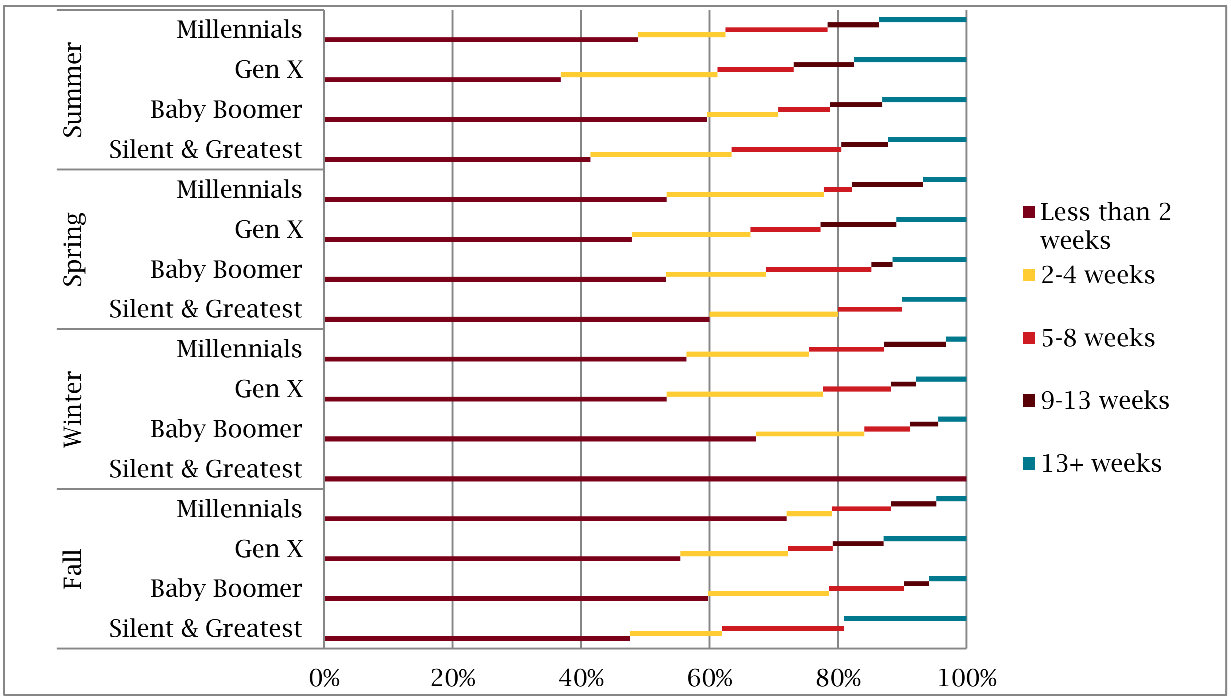

Fig. 27: Trip planning timeframe among respondents to Mille Lacs Lake area visitor survey, by season and generation (n=1426).

In terms of information sources used to plan for the trip, the most frequent were friends and family (48.2 percent), followed by area/destination website (20.1 percent; Figure 28). Seven percent of respondents identified past experience as an information source. Facebook, online travel reviews, and area/destination visitor guides were each identified as information sources by about four percent of respondents. No other information source was used by more than four percent of respondents.

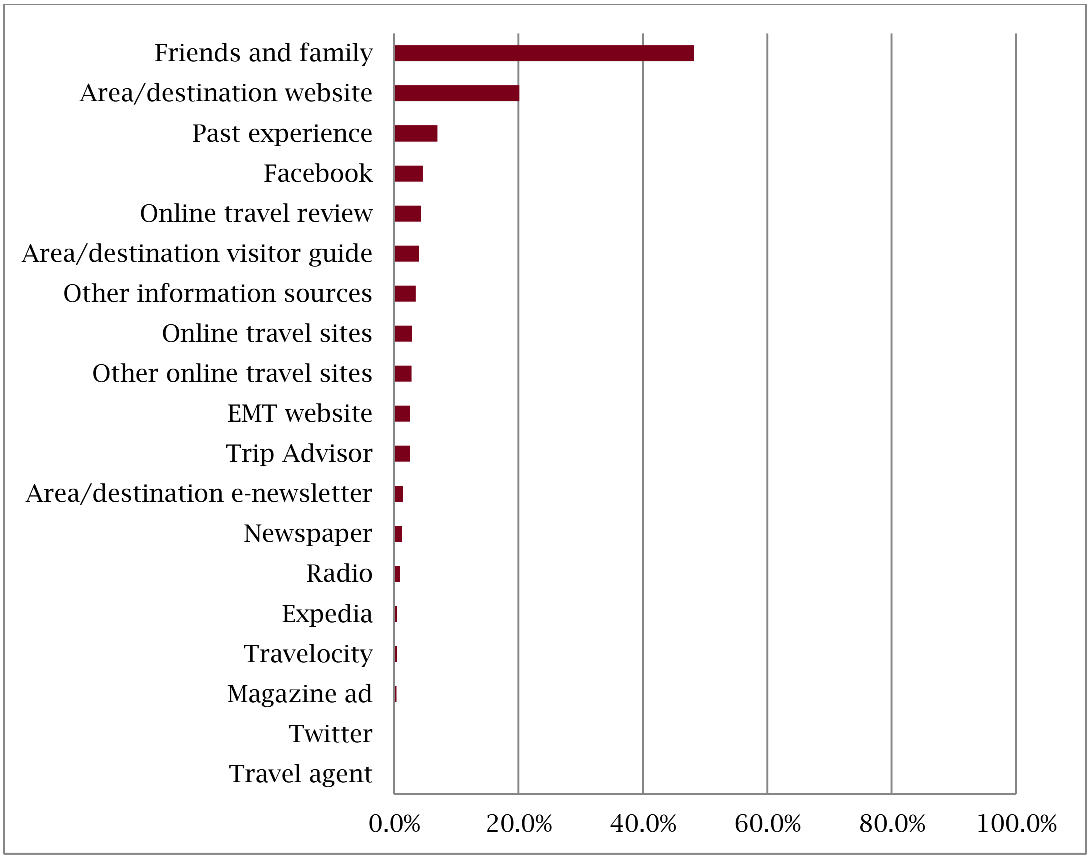

Fig. 28: Information sources used by respondents to Mille Lacs Lake area visitor survey (n=1530).

According to Table 6, there seems to be nominal (not statistically significant) differences in information sources used to plan the trip across seasons and generations. Across all generations in each season, friends and family was the most frequently used information source (Table 6). The second most frequently used information source was area/destination website, particularly among Gen X in spring, silent and greatest generations in winter, as well as millennials in fall and winter. For silent and greatest generations, baby boomers and Gen X in fall, winter, and summer, past experience was the third most frequently used information source. However, this was not the case for millennials in any season, nor was it the case for any generation in spring. Facebook was the fourth most frequently used information source, except for silent and greatest generations in winter and baby boomers and Gen X in summer. Some respondents also used other information sources, particularly among silent and greatest generations in winter and spring.

Table 6: Top five information sources used by respondents to Mille Lacs Lake area visitor survey, by season and generation (n=1530).

		Friends / family	Area / destination website	Past experience	Facebook	Other
Fall	Silent & Greatest	24.1%	17.2%	6.9%	3.4%	3.4%
	Baby Boomer	43.8%	16.0%	8.0%	5.6%	1.9%
	Gen X	48.0%	17.6%	9.8%	3.9%	3.9%
	Millennials	56.5%	28.3%	2.2%	4.3%	4.3%
Winter	Silent & Greatest	28.6%	28.6%	28.6%	14.3%	28.6%
	Baby Boomer	56.5%	13.0%	10.4%	4.3%	3.5%
	Gen X	50.9%	23.6%	10.4%	7.5%	0.9%
	Millennials	62.8%	29.8%	4.3%	9.6%	1.1%
Spring	Silent & Greatest	40.0%	10.0%	0.0%	20.0%	10.0%
	Baby Boomer	48.4%	12.9%	7.3%	8.1%	2.4%
	Gen X	43.9%	38.2%	2.4%	3.3%	1.6%
	Millennials	31.1%	13.3%	0.0%	2.2%	2.2%
Summer	Silent & Greatest	23.6%	15.3%	6.9%	1.4%	0.0%
	Baby Boomer	44.2%	13.9%	7.7%	2.9%	7.2%
	Gen X	50.9%	22.1%	9.2%	2.5%	5.5%
	Millennials	63.3%	22.2%	4.4%	3.3%	3.3%

Impact of social media in trip

The majority of respondents (88.5 percent) did not change their original plans based upon information found on social media (Figure 29). Ten percent of respondents indicated making minor changes to their original travel plans based on social media, while 1.8 percent made significant changes.

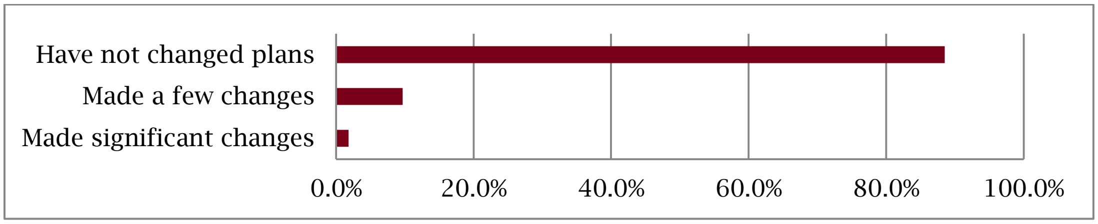

Fig. 29: Impact of social media on original travel plans among respondents to Mille Lacs Lake area visitor survey (n=1334).

Sharing information about the trip

Approximately 55 percent of respondents would share information about their trip on Facebook (Figure 30), followed by text messages (37.4 percent) and Instagram (7.1 percent). No other medium was identified by more than five percent of respondents as an information sharing medium.

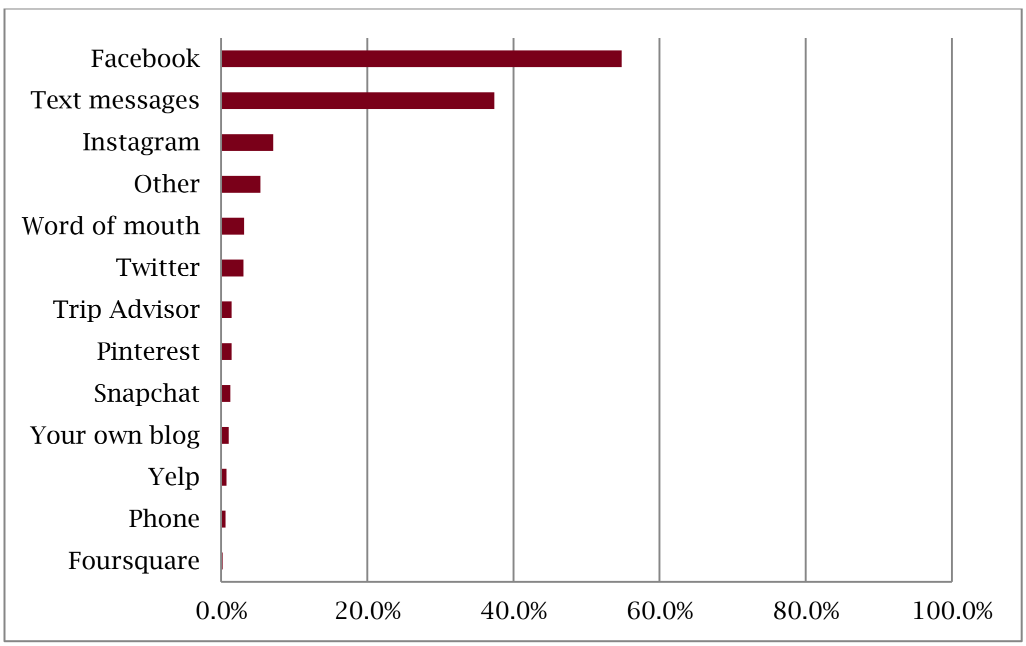

Fig. 30: Information sharing sources among 2014 Mille Lacs Lake area visitor survey (n=1530).

DISCUSSION

Focusing on the demographics, trip characteristics, behaviors, and spending of visitors to the Mille Lacs Lake area, this part of the report discusses implications of project findings. Comparisons with 2001 visitor survey findings are also offered where applicable.

Trip information

Overall, the Mille Lacs Lake area attracts visitors who are: (1) Minnesota residents (and mostly residing in the Minneapolis-St. Paul-Bloomington metropolitan area), (2) repeat visitors traveling to the area frequently, (3) taking short trips, and (4) more likely to use unpaid accommodations (including one's own vacation home) than stay at hotels/motels or resorts.

The frequency of travel to the area by repeat visitors was much higher in 2014 than in 2001—a median of 15 trips in the past five years by 2014 respondents vs. a median of one trip in the past five years by 2001 respondents. At the same time, 2014 respondents spent fewer nights in the area than those in 2001. While 28.5 percent of 2001 respondents spent more than five nights in the area, only 4.2 percent of 2014 respondents did so. About 32 percent of 2001 respondents spent one or two nights in the area; in 2014, close to 61 percent of respondents did so. Therefore, while the total number of nights spent in the area in a five-year period may not have declined, the trend of taking shorter trips more frequently, rather than longer trips less frequently, is clear.

A higher percentage of respondents stayed at unpaid accommodations (from 19.8 percent in 2001 to 34.7 percent in 2014), including one's own vacation home. In fact, "your own vacation home" was the most frequently chosen lodging type in 2014, and eight percent of respondents identified cabins/second home as the primary reason to visit the area. Clearly, assessing and meeting the needs of vacation home owners may generate new economic opportunities in the future. Equally important to explore is where tourism opportunities lie with this group.

Meanwhile, there were dramatic decreases in the percentage of respondents staying at hotels/motels (from 44 percent in 2001 to 16.2 percent in 2014) and resorts or commercial cabins (from 31.5 percent in 2001 to 12.8 percent in 2014). At the same time, 12.5 percent of 2014 respondents stayed in fish houses, a lodging type not included in the 2001 survey. Listing "fish house" as a lodging type, separate from "resort / commercial cabin," may largely explain the decrease in the latter. There are two other possible reasons for the large decrease in visitors staying at hotels or motels: (1) a change in the type of visitors the area attracts, and (2) a decrease in supply of hotels/motels in the area.

When it comes to campgrounds, the percentage of respondents choosing this lodging type was similar to 2001 (22.4 percent then and 21.6 percent in 2014). It was also the second most frequently chosen lodging type in 2014. This finding suggests the importance of paying attention to campgrounds, in terms of maintenance and expansion opportunities.. Moreover, 38 percent of campground users were Gen X and 36 percent were baby boomers, indicating a need to balance and fulfill the needs of these two visitor segments. Overall, fewer than two percent of 2014 respondents stayed at a vacation rental by owners (VRBO), although the percentage was higher in summer than in winter or spring. For now, VRBO does not seem to play a large role in lodging, although tracking the percentage of visitors staying at VRBO might be desirable to monitoring whether there is any significant upward trend. Another trend worth tracking is the percentage of visitors using AirBnB—an online service that allows residents to rent rooms in their homes to visitors.

Visitor spending

Restaurant/bar was the highest spending category, which supports the finding that the most frequently participated in activity was dining out. Overall, the highest spending occurred in winter. Given that ice fishing is the dominant reason to visit Mille Lacs in winter, the finding indicates the economic value of ice fishing, as it affects other economic sectors as well. Spending was comparatively low in fall and spring—the two shoulder seasons. Visiting family and friends was a top reason to visit the area in these two seasons. Another main reason to visit was outdoor recreation other than fishing in fall and festivals/events in spring. Understanding and catering to visitors with these travel interests may help increase spending in the shoulder seasons.

Demographics

The gender composition of respondents was nearly identical in 2001 and 2014—about 58 percent male and a little more than 40 percent female. Meanwhile, respondents in 2014 had a higher family income than in 2001. In 2001, 7.1 percent of respondents had a family income of $100,000 or more (in 2001 dollars). In 2014, 29 percent had a family income higher than $125,000 (in 2014 dollars). Additionally, respondents in 2001 and 2014 were both well educated. A slightly higher percentage of respondents in 2014 had a bachelor's degree than in 2001 (25.7 percent vs. 24.6 percent, respectively) or had some college education (25 percent in 2014 vs. 23.7 percent in 2001). A smaller percentage of respondents in 2014 had less than a high school education in 2014 than in 2001 (0.3 percent vs. 1.9 percent, respectively) or were high school graduates (18.9 percent in 2014 vs. 20.8 percent in 2001).

Group size and composition

Travel party size was bigger in 2014 than in 2001, from a median of two to a median of three. There was also a large increase in the percentage of respondents traveling alone and those traveling in groups of more than five people. Additionally, there was a small increase in the percentage of those traveling in groups of three. There was a large decrease, however, in the percentage of respondents traveling in groups of two and a slight decrease in the percentage of those traveling in groups of four or five.

The increase in large travel groups is corroborated with the finding that the most prevalent travel group type in 2014 was family. Furthermore, 2014 respondents were much more likely to travel with children under 18 than those in 2001, indicating an opportunity for the destination to become more child friendly. Indeed, 3.8 percent of respondents suggested that the destination build a water park/splash pad/pool, and 3.6 percent suggested the destination offer more family-friendly activities. This is not a new phenomenon, as 2.1 percent of 2001 respondents recommended "activities for kids" as a change to the destination area. Therefore, developing activities and amenities that cater to families with children may be an opportunity to diversify tourism offerings in the area.

Trip activities

Respondents participated in a variety of activities while in Mille Lacs. Overall, one-third of respondents indicated fishing was as a primary reason to visit the area, and half of respondents participated in fishing. Clearly, fishing is an important draw to and activity in the area. In 2001, 15.8 percent of respondents called for better fishing regulations/removing slot limits, while 19.3 percent of respondents did so in 2014. This issue has been ongoing and seems to have become more significant. The fishing slot limit has been increasingly tight as the walleye population in the lake has been declining. State resource experts maintain that managing walleye populations takes time. Given this situation, with responsibility for fishery management beyond the direct control of tourism businesses, the destination may want to consider the risks of relying solely on its image as a walleye fishing destination. Doing so makes it vulnerable when the fishery resources are restricted. To increase its resilience and long-term success, the destination needs to diversify its offerings and reshape its image to attract visitors who look for other activities—those that Mille Lacs can offer but may have been overlooked.

Although fishing is the most popular activity in the area, it is not dominant. Visiting family/friends and outdoor recreation other than fishing are two other visitor segments that should not be overlooked and where opportunities for future growth lie. These opportunities include the following:

1. There are potentials to attract more Gen X and millennials to visit state parks in the shoulder seasons (fall and spring) as well as more baby boomers and oldest generations to state parks in the spring and summer. Nearly five percent of respondents (4.7 percent) identified visiting state parks as their favorite activity in the area, and 2.8 percent suggested bike trails as something they would like to have but are currently unavailable in the area. These findings indicate opportunities to better market access to state parks and the bike trails that the area does have.
2. Marketing the camping facilities and amenities in the area may help attract visitors who enjoy camping and being outdoors. As mentioned earlier on, camping has continued in popularity from 2001 to 2014. In 2014, seven percent of respondents identified camping as their favorite activity in the area.
3. Close to five percent of respondents identified golf/mini golf as their favorite activity in the area, while 3.8 percent suggested golf/mini golf as an activity they would like to have but is currently unavailable in the area. Clearly, the activity is available, but visitors may not be aware of the opportunity, presenting opportunities for better marketing.
4. Promoting lake activities other than fishing also present themselves as growth opportunities. For example, what could be done to appeal to boaters, given 10.5 percent of respondents identified boating as their favorite activity in the area? Gear and equipment rental for lake activities is another potential opportunity, particularly to attract younger generations (Gen X and millennials).
5. Beautiful lake/scenery was identified by 34.4 percent of 2001 respondents as to what they liked best about Mille Lacs Lake. In 2014, however, only 6.7 percent of respondents mentioned the lake or lake area, and 4.9 percent mentioned scenery/ sightseeing as their favorite activity in the area. There was also a sizable decrease in the percentage of respondents mentioning tranquility/relaxation as what they liked the best about the area (from 6.4 percent in 2001 to 2.5 percent in 2014). Clearly, there is an awareness gap in terms of the beauty and tranquility the lake area offers. With more people taking shorter and more frequent trips to the area, and with close to 74 percent of current visitors from the Twin Cities metro area, there is an opportunity to market the lake area as a (long) weekend getaway that offers scenic views and tranquility.
6. It is worth pointing out that the snowfall level in the winter of 2014-2015 was comparatively low, which likely led to lower than usual participation rates in snow activities. Snow activities should not be overlooked, however, particularly snowmobiling, snowshoeing, and cross country skiing.

Five more opportunities also emerged from project findings. First, dining out is the most frequently participated in activity, particularly in winter. Eight percent of 2014 respondents identified dining out as their favorite activity, and more than five percent suggested either more or better dining out options as activities they would like to have but are currently unavailable in the area. Apparently, the destination has a good base of dining options, but opportunities certainly exist to add new ones or to recreate existing ones to entice more visitors.

Second, nightlife/evening entertainment had a greater participation rate in winter and spring but lower participation in summer and fall among Gen X and millennials. The older generations had a comparatively stable participation rate in this activity. Potential exists to attract younger generations to participate in nightlife/evening entertainment more frequently in summer and fall.

Third, 5.3 percent of respondents identified shopping as their favorite activity in the area, while 5.8 percent suggested more or better shopping options as activities they would like to have but are currently unavailable in the area. These findings indicate current shopping options in the area serve visitors well, but improvement may be needed to continue attracting more visitors in the future. A retail gap analysis may help shed some light in this regard.

Fourth, festivals and events had a high participation rate from visitors in winter and summer. It may be worthwhile to review festival and event offerings in spring and fall, to find out how to attract more visitors to attend festivals and events in the shoulder seasons. Additionally, visitors were more likely to attend festivals/events as an activity than to identify it as the primary reason to visit the area. While festivals/events may not be the main draw that attracts visitors to the area, they increase visitor engagement once they *are* in the area.

Fifth, sightseeing had the highest participation rate in the fall. While participation rates were not low in spring and summer, there is room to grow the share of visitors who participate in sightseeing while in the area in warmer seasons.

Trip planning and sharing

More than half of respondents planned their trip less than two weeks in advance and 18 percent within a month. To take the most advantage of a limited marketing budget, the destination's marketing planning and execution needs to take into account visitors' short planning timeframe. In terms of information sources, friends and family is still the most frequently used. Twenty percent of respondents used an area/destination website, the second most frequently used information source. This finding indicates the importance of maintaining and continuously improving the destination's website.

Considering smartphones are prevalent and visitors are more spontaneous in activity participation while in the destination area, it is critical that tourism businesses are accurately located on digital maps (e.g., Google Map, Yelp). This helps visitors with smartphones to easily locate desirable activities and go directly to the activities' location.

When it comes to sharing information about their trip to Mille Lacs, more than half of respondents chose to use Facebook. Clearly, Facebook is an established social media platform through which respondents are willing to share about their travel. On the other hand, few respondents indicated they had turned to Facebook to gather information during trip planning. Encouraging businesses in the destination area to maintain their Facebook presence is a good way to better engage visitors and market themselves. Another suggestion is to encourage visitors to tag the businesses they have visited when sharing their trips on Facebook, thus increasing the number of "impressions" and link clicks on the business' Facebook page.

REFERENCES

Liu, H. C. (2001). *2001 Mille Lacs Lake Area Travel Survey*. St. Paul, MN: Minnesota Department of Trade and Economic Development.

APPENDIX A: List of survey locations

Survey locations
Appeldoorn's
Bayview restaurant
Castaway's
End of Winter Bash at Garrison
Farm Market Café
Father Hennepin public landing
Fiddlestix Golf Course
Fishermen's Wharf Resort
Father Hennepin State Park
Garrison Inn & Suite
Garrison Play Day
Garrison public landing
Isle Day
Johnsons Portside Bait
Junction gas
Kathio State Park
Kite crossing event in Garrison
Liberty Beach public landing
Lundeen's
Mac’s Twin Bay Resort
Malmo public landing
McQuoid's Inn
Mille Lacs Band's annual Pow Wow
Mille Lacs Indian Museum
Nitti's Hunters Point Resort
Pete's Retreat
South Isle Campground
Spirit Lake Inn
Spirit Lake Steakhouse
The Good Life at Liberty Beach
The Y Club
Trailside BP Bait & Tackle
Twin Pine Resort
Wahkon Day
Walleye Dundee's Resort
Wealthwood hunting access
Wealthwood public landing

APPENDIX B: List of respondents' final destinations

Final destination (n=174)	Count	%
Itasca area (incl. Grand Rapids, Marcell, Lake Winnie, Leech Lake, Cass Lake, Deer River, Bowstring)	33	19.0%
Aitkin area	25	14.4%
Brainerd / Breezy Point / Fifty Lakes / Crosby / Cuyuna / Deerwood	22	12.6%
Cross Lake	11	6.3%
Twin Cities (incl. Minneapolis, Inner Grove Heights, Ramsey, Sunset Lake, Long Lake)	11	6.3%
Remer/Longville	6	3.4%
Duluth-Two Harbors	5	2.9%
Bay Lake	4	2.3%
Hill City	3	1.7%
My cabin	3	1.7%
St. Cloud	3	1.7%
Emily/Outing	3	1.7%
Big Pine Lake	2	1.1%
Ely	2	1.1%
Finlayson/Pine Lake	2	1.1%
Home	2	1.1%
Leech Lake	2	1.1%
Sturgon Lake/Moose Lake	2	1.1%
Walker	2	1.1%
Alaska	1	0.6%
Alexandria	1	0.6%
Beaver Bay	1	0.6%
Becker	1	0.6%
Bemidji	1	0.6%
Boise, Idaho	1	0.6%
Camp Lake, WI	1	0.6%
Cancun, Mexico	1	0.6%
Chicago	1	0.6%
Fargo, ND	1	0.6%
Giese	1	0.6%
Glacial State Park	1	0.6%
Glen	1	0.6%
Hibbing	1	0.6%
Hinckley	1	0.6%
Knife Lake	1	0.6%
Lake Vermilion	1	0.6%

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Lakeshore	1	0.6%
New Orleans, LA	1	0.6%
North Round Lake, Palisade	1	0.6%
North shore	1	0.6%
North West Coast	1	0.6%
Park Rapids	1	0.6%
Partridge Lake	1	0.6%
Pokegama	1	0.6%
Rainer	1	0.6%
Rainy Lake	1	0.6%
Ripple Lake	1	0.6%
Sandstone	1	0.6%
Sauk Center	1	0.6%
Wadena	1	0.6%

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APPENDIX C: List of respondents' favorite tourism activities in Mille Lacs

Favorite Activities in Mille Lacs area (on=1397)	Count	%
Fishing related		
Fishing	618	44.2%
Ice fishing	11	0.8%
Used to be fishing	7	0.5%
There's no fishing	1	0.1%
Water related		
Boating	146	10.5%
Lake/lake area	93	6.7%
Swimming	63	4.5%
Kiteboarding/Kiting/Kitesurfing	15	1.1%
Beach	14	1.0%
Kayaking	12	0.9%
Water activities (no specification)	10	0.7%
Jet skiing	6	0.4%
Canoeing	6	0.4%
Sailing	3	0.2%
Tubing	2	0.1%
Scuba diving	1	0.1%
Parasailing	1	0.1%
Sailboarding	1	0.1%
Water skiing	1	0.1%
Windsurfing	1	0.1%
Outdoor, non-water, non-snow		
Camp/camping/campgrounds	98	7.0%
Golf/Golfing	65	4.7%
State Parks (Father Hennepin, Kathio)	65	4.7%
ATV/Fourwheeling	55	3.9%
Hunting	51	3.7%
Hiking	48	3.4%
Biking	25	1.8%
Nature/outdoor/trails	19	1.4%
Bon/Camp/Pit fires	14	1.0%
Walking	12	0.9%
Motorcycling	8	0.6%
State Forest	5	0.4%
Mountain Biking	3	0.2%
Running	3	0.2%
Gardening	2	0.1%
Geocaching	2	0.1%
Bird watching	1	0.1%
Horseback riding	1	0.1%
Picnic	1	0.1%
Snow activities		
Snowmobiling	40	2.9%
Skiing (incl. cross-country)	6	0.4%

Snowshoeing	1	0.1%
All others		
Casino/gambling	113	8.1%
Dining/dining out/eating out/restaurant/good food	112	8.0%
Shopping (incl. variety stores, pawn shop, antique shopping, garage sales)	74	5.3%
Sightseeing/scenery/scenic	68	4.9%
Bar/bar hopping/drinking (beer)/nightlife	59	4.2%
Visit/spend time with family/friends	52	3.7%
Leisure/relax/tranquility	35	2.5%
Historic sites/Museums	33	2.4%
Resort	24	1.7%
Festivals/Fairs/Events (incl. Powwow)/Celebrations	21	1.5%
Cabin	19	1.4%
Concert/entertainment/music	13	0.9%
Meat raffle	10	0.7%
Water activities (no specification)	10	0.7%
small towns	8	0.6%
Shooting (incl. Boon's gun range)	6	0.4%
Bowling	3	0.2%
Driving around	3	0.2%
Farmers market	3	0.2%
Fireworks	3	0.2%
Friendly people	3	0.2%
Family fun/kids activities	2	0.1%
Movies/theater	2	0.1%
Second/summer home	2	0.1%
sightseeing-fall color	2	0.1%
Vets club	2	0.1%
Bingo	1	0.1%
R&R	1	0.1%
Train ride	1	0.1%
Water parks	1	0.1%
Winery	1	0.1%

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APPENDIX D: List of tourism activities or attractions that respondents would like to have but are currently unavailable in Mille Lacs

What tourism activities or attractions would you like to have in Mille Lacs are but currently are not available? (n=498)	Count	%
Fishing related		
Fishing-better management/increase fish slot	96	19.3%
"Walleye fishing"	28	5.6%
Fishing/better fishing	20	4.0%
Something other than fishing/gambling	3	0.6%
Fishing-ban netting	2	0.4%
Fishing-ice fishing	2	0.4%
Fishing-Catch and release only regulations	1	0.2%
Dining/food related		
Dining out-better	28	5.6%
Dining-more options	26	5.2%
Dining-lakeside/outdoor/patio seating	8	1.6%
Dining-high end	3	0.6%
Bakery	3	0.6%
Brewery	3	0.6%
Dinner cruise	2	0.4%
Ice cream shop/Dairy Queen	2	0.4%
Dining-pizza delivery	1	0.2%
Dining-food truck	1	0.2%
Chinese food	1	0.2%
Coffee shop	1	0.2%
Candy store	1	0.2%
Sunday liquor stores	1	0.2%
Water activities		
Lake activity rental-boat, jet ski, kayak	12	2.4%
Better marina facilities	3	0.6%
Boat racing	3	0.6%
Cruise ship tour on the Lake	3	0.6%
Boating/boat access-more	2	0.4%
Boating-flying paddle	2	0.4%
Parasailing	2	0.4%
Sailing	2	0.4%
Boat tour	1	0.2%
Scuba	1	0.2%
Dock in Garrison	1	0.2%
Dock in Wahkon	1	0.2%
Standup paddle boarding	1	0.2%
Tubing	1	0.2%
Water ski	1	0.2%
Snow activities		
Cross country skiing	3	0.6%
Ice Bar	1	0.2%
Ice racing	1	0.2%

Snowmobile rental	1	0.2%
Outdoor activities, non-water, non-snow		
Mini golf / golf	19	3.8%
More public beach/pool/swimming	10	2.0%
Go carts	7	1.4%
More parks	6	1.2%
Camground-bigger & need electricity	3	0.6%
Horseback riding	3	0.6%
Mountain biking	3	0.6%
Hunting-better & more land	2	0.4%
More spots for shore fishing	2	0.4%
Bike rentals	1	0.2%
Allow pop-up campers	1	0.2%
Frisbee golf	1	0.2%
Horseshoe pit	1	0.2%
More RV sites (non-seasonal)	1	0.2%
Tennis	1	0.2%
Facilities related		
Water park/splash pad/pool	19	3.8%
Movie theater	8	1.6%
Lodging-better options & cleaner	7	1.4%
Amusement/adventure Park	3	0.6%
Community center	2	0.4%
Exercise facilities	2	0.4%
More casinos	2	0.4%
Rest area	2	0.4%
Drive-in theaters	1	0.2%
Gas station	1	0.2%
Gym	1	0.2%
Parking-more near the Lake	1	0.2%
Race track	1	0.2%
Gun range	1	0.2%
Visitor center	1	0.2%
Zoo	1	0.2%
Shopping related		
Shopping-better & more opportunities	29	5.8%
Big box store (Target, Wal-Mart, etc.)	2	0.4%
Craft store	2	0.4%
Antiques	1	0.2%
Garage sale	1	0.2%
Harley dealership	1	0.2%
Trail related		
Trails-bike/mountain bike	14	2.8%
Trails-ATV	8	1.6%
Trails-hiking	6	1.2%
Trails (no specification)	1	0.2%
Trails-fourwheeling	1	0.2%
Event related		

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Concert/live music	9	1.8%
Event-biking	1	0.2%
Event-community	1	0.2%
Event-county fair	1	0.2%
Event-more	1	0.2%
Event-running	1	0.2%
All others		
Family attraction/fun; family/kid-friendly; children/kids activities	18	3.6%
Gentlemen's clubs/strip clubs	17	3.4%
More evening entertainment	9	1.8%
Cell phone coverage-better	5	1.0%
Spa/nail salon	4	0.8%
Farmers market	3	0.6%
Ziplining	3	0.6%
Winery/wine tour	2	0.4%
GLBT friendly	1	0.2%
More meat riffle	1	0.2%
Recycling program	1	0.2%
Shuttle to and from further distance	1	0.2%
Spearing	1	0.2%
Special for seniors	1	0.2%
Tire shop	1	0.2%
Transportation to casino	1	0.2%
Wifi access	1	0.2%

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APPENDIX E: List of alternative destinations respondents would go to

If you could not come to the Mille Lacs area for this primary activity, where would you go? (n=912)	Count	%
Activity based		
Anywhere that had biking and paddling	8	0.9%
Casino	2	0.2%
Fishing	2	0.2%
On a Cruise	1	0.1%
Close to home / home		
Home/stay home/family farm/nowhere	33	3.6%
Around/close to home	14	1.5%
Location based		
Another area/(state) park/campground/lake/ festival	77	8.4%
My own cabin	6	0.7%
Close to Lake Mille Lacs		
Aitkin area	8	0.9%
Garrison, MN	1	0.1%
Twin Cities area related		
Twin Cities area (incl. Anoka County, Coon Rapids, Lake Calhourn, Lake Minnetonka, Three River Park)	52	5.7%
100 mile radius of Twin Cities	2	0.2%
150 miles of St. Paul	1	0.1%
Elsewhere in the U.S.		
Alaska	2	0.2%
Arizona	1	0.1%
Colorado	1	0.1%
Florida	8	0.9%
Iowa (incl. Des Moines)	6	0.7%
Las Vegas	4	0.4%
Michigan/Upper Michigan	2	0.2%
Missouri	1	0.1%
Montana	1	0.1%
North Dakota (incl. Devils Lake)	4	0.4%
Oregon Coast	1	0.1%
South Dakota (incl. Sioux Falls)	4	0.4%
Texas	1	0.1%
west Yellowstone	1	0.1%
Wisconsin (incl. Balsam Lake, Deer Lake, Hayward, Moose Lake, Waupaca, West Salem, Wisconsin Dells)	41	4.5%
Wyoming	1	0.1%
South U.S.	1	0.1%
Anywhere in the US	1	0.1%

Other countries		
Canada	5	0.5%
Mexico	3	0.3%
Ireland	1	0.1%
Istanbul, Turkey	1	0.1%
Nicaragua	1	0.1%
Thailand	1	0.1%
I don't know/not sure	5	0.5%
Somewhere else in MN		
Northern Minnesota/North Shore (incl. Grand Marais)	41	4.5%
Somewhere else in Minnesota	5	0.5%
Southern MN	3	0.3%
Mississippi River	3	0.3%
Specific locations		
Itasca area (incl. Leech Lake, Chippewa National Forest, Lake Winnie, Cass lake, Deer River)	100	11.0%
Brainerd / Breezy Point / Crosby / Cuyuna / Deerwood / Gull Lake	73	8.0%
Duluth area-Two Harbors	56	6.1%
Lake of the Woods	51	5.6%
Red Lake	40	4.4%
Alexandria	20	2.2%
Walker	13	1.4%
Lake Vermilion	7	0.8%
Prior Lake area	7	0.8%
Detroit Lakes	6	0.7%
Big Sandy	5	0.5%
Clearwater	5	0.5%
Cross Lake	5	0.5%
Ely	5	0.5%
International Falls area	5	0.5%
Longville	5	0.5%
Park Rapids	5	0.5%
Red Wing	5	0.5%
St. Croix	5	0.5%
Hinckley	4	0.4%
Osakis	4	0.4%
Remer	4	0.4%
Rush City	4	0.4%
St. Cloud	4	0.4%
Bay Lake	3	0.3%
Bemidji	3	0.3%
Lake Superior	3	0.3%

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Owatonna	3	0.3%
Pequot Lake	3	0.3%
Wild River State Park	3	0.3%
Big Lake	2	0.2%
Big Stove Lake	2	0.2%
Crow Wing County	2	0.2%
Faribault	2	0.2%
Fergus Falls	2	0.2%
Lake Pepin	2	0.2%
Lanesboro	2	0.2%
McGregor	2	0.2%
Orr	2	0.2%
Ottertail county	2	0.2%
Pelican Rapids	2	0.2%
Pine City	2	0.2%
Platte lake	2	0.2%
Rainy lake	2	0.2%
Richmond (incl. El Rancho Manana)	2	0.2%
Rush Lake	2	0.2%
Sauk Center	2	0.2%
Sullivan lake	2	0.2%
Taylor Falls	2	0.2%
Wright County	2	0.2%
Ash River	1	0.1%
Barnum	1	0.1%
Battlelake	1	0.1%
Baudette	1	0.1%
Bear Head Lake	1	0.1%
Big Birch Lake	1	0.1%
Birch Lake/ Elk River	1	0.1%
Black Bear	1	0.1%
Black Duck, MN/Decorah, Iowa	1	0.1%
Boundary Waters	1	0.1%
Buffalo Lake	1	0.1%
Burtrum	1	0.1%
Carlton	1	0.1%
Cedar, Farm Island	1	0.1%
Chicago	1	0.1%
Chisago Lakes	1	0.1%
Clitherall	1	0.1%
Crane Lake	1	0.1%

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Davenport	1	0.1%
Eddies	1	0.1%
Glen	1	0.1%
Grand View	1	0.1%
Granite Falls	1	0.1%
Green Lake	1	0.1%
Ham Lake	1	0.1%
Hill City	1	0.1%
Kabetogama (Voyageurs National Park)	1	0.1%
Kimberly	1	0.1%
Lake Alex	1	0.1%
Lake City	1	0.1%
Lake Koronis	1	0.1%
Lake Osakis	1	0.1%
Lake Tahoe	1	0.1%
Lakeville	1	0.1%
Little Falls	1	0.1%
Mankato	1	0.1%
Morrison County	1	0.1%
Morton	1	0.1%
Mystic Lake	1	0.1%
Nevis	1	0.1%
New Ulm	1	0.1%
Ottertail lake	1	0.1%
Palisade	1	0.1%
Preston	1	0.1%
Rice county	1	0.1%
Rice Lake	1	0.1%
Round Lake	1	0.1%
Sand lake	1	0.1%
Sauk Lake	1	0.1%
Shakopee	1	0.1%
Silver Lake	1	0.1%
Squaw Lake	1	0.1%
Sugar Lake	1	0.1%
Superior	1	0.1%
Swatara	1	0.1%
Tanka	1	0.1%
Todd County	1	0.1%
White Bear Lake	1	0.1%
Zumbrota	1	0.1%

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