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TOURISM CENTER

Shooting Star Casino Event Attendee Study: Spring 2016

Authored by Rani A Bhattacharyya and Xinyi (Lisa) Qian, Ph.D.

Presented in partnership with the EDA Center at the University of Minnesota Crookston



The **EDACENTER**

at the University of Minnesota Crookston

Shooting Star Casino Event Attendee Study: Spring 2016

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EXECUTIVE SUMMARY

In 2015, the White Earth Economic Development Office received grant funding from the EDA Center at the University of Minnesota Crookston to conduct a project profiling event attendees at Shooting Star Casino in Mahanomen, Minnesota. The purpose of the project was to support the White Earth Economic Development Office and the city of Mahanomen in understanding the characteristics and activities of event attendees at Shooting Star Casino during off-season months. An intercept survey was distributed between February and April 2016. Below is a summary of the findings based on 335 eligible survey responses.

RESPONDENTS

Fifty-five percent of respondents were female, with 67.2% self-identifying as White. The average age of respondents was 49. The annual household income of about 37% of respondents was in the \$50,000 - \$99,999 range, followed by slightly more than 35% in the \$25,000-\$49,999 range.

Eighty percent of respondents resided in the state of Minnesota. Another 18% came from North Dakota. The top five counties respondents came from were Mahanomen (19.3%), Becker (14.2%), Clearwater (9.2%), Cass (North Dakota; 8.2%), and Otter Tail (7%).

2016 SPRING TRIP INFORMATION

Shooting Star Casino was the primary destination for 96% of respondents, and close to 60% took a day trip to Mahanomen. Of those who stayed overnight in Mahanomen, 63% stayed one night, 22% stayed two nights, and 13.4% stayed three to four nights. The average event attendee traveled in a group of three people, with close to half traveling with adults 51-69 years old and 35.8% traveling with adults 36-50 years old. The most frequently chosen lodging type for those staying overnight was the Casino hotel (70.7%), followed distantly by the home of a friend or relative (12.2%).

The average spending per day was \$134.60 per person, although the number varied widely from visitor to visitor. Specifically, the average per-person spending was \$67.70 on casino gaming, \$14.60 on lodging, \$13.20 on restaurants, and \$13.10 on event-related expenses. The average per-person spending was less than \$8 per day for each of the other five spending categories (transportation, shopping, miscellaneous, recreation, and groceries).

TRIP ACTIVITIES

The most frequently identified trip activities included dining out (67.8%), nightlife/evening entertainment (49.9%) and casino/gaming (41.5%). When asked about the likelihood of attending another show at Shooting Star Casino within the next 12 months, 66.6% indicated they were very likely to do so. Meanwhile, 66% of respondents did not visit downtown Mahanomen or any of the businesses along Highway 59. When asked what kinds of businesses would attract them to the downtown area, 26.3% identified full-service sit down restaurants. About 17% identified antique stores, 15.5% casual fast food restaurants, 14.6% arts and crafts stores, and 14% general merchandise stores.

INTRODUCTION

Consumer profile information is essential for tourism marketing and planning. In 2007, the University of Minnesota (U of M) Tourism Center conducted a visitor profile study in the Mahnomen/ Detroit Lakes area. The data needed to be updated, however, to reflect almost a decade of changes. The arts and entertainment sector of the economy continues to be the second largest employer in the region, following education and health services (US Census, 2013). The economic impact of the arts and entertainment sector makes it important to survey event attendees at Shooting Star Casino, a primary event venue in Mahnomen. Understanding event attendees' characteristics and activities can inform future planning and decision making concerning the arts and entertainment sector.

In 2015, the White Earth Economic Development Office (WEEDO) invited U of M Extension to a community meeting to discuss the potential of surveying event attendees at Shooting Star Casino. U of M Extension designed the project, which was approved by both the WEEDO and the city of Mahnomen. The project received funding from the EDA Center at U of M Crookston. This summary report presents the methods and findings of the event attendee survey conducted at Shooting Star Casino in the spring of 2016 (February through April).

METHODOLOGY

University of Minnesota Extension reached out to the contemporary math class (Math 105) at the White Earth Tribal and Community College to recruit and train on-site volunteer surveyors. A total of 14 students volunteered to conduct the intercept survey of Shooting Star Casino event attendees and were trained by U of M Extension on intercept survey administration. The survey took place in the spring of 2016, specifically between February 12, 2016 and April 22, 2016. While this was a relatively short survey period, it was designed to match the class schedule at White Earth Tribal and Community College with the community's interest in collecting off-season data.

STUDY SETTING

Mahnomen County, with a 2013 population of 5,532 residents, is located in Northwest Minnesota (U.S. Census Bureau, 2015). In addition to Shooting Star Casino, which is owned by the White Earth Nation, the city of Mahnomen is also home to the Mahnomen County Historical Society and Gizhiigin Arts Place incubator. The county overlaps boundaries with the Tamarac National Wildlife Refuge and many other natural assets. The eastern half of the county is also home to a number of private vacation homes and resorts. Its natural and physical assets make the area a tourism destination in Minnesota, attracting visitors from the upper Midwest and parts of Canada.

SAMPLING

After discussions with the White Earth Economic Development Office, city of Mahnomen, Shooting Star Casino, and the White Earth Tribal and Community College (WETCC), a survey schedule was developed based on the events at the casino and volunteer availability. These concerts/events covered a broad range of audiences and included the following artists: The Nitty Gritty Dirt Band, Blood Sweat and Tears with Bo Dice, The Nashville Celts, Ronnie Milsap, Skidrow, Jay Leno, Ricky Springfield, and Country Unplugged (Lorrie Morgan, Mark Chesnut, and Joe Diffie).

Questionnaires were collected at a total of eight events during nine days at Shooting Star Casino. All questionnaires were administered in person by volunteer surveyors trained by University of Minnesota Tourism Center.

QUESTIONNAIRE

An onsite questionnaire was developed based on past research and with the assistance of the White Earth Economic Development Office and city of Mahanomen. Questionnaire sections included trip duration, spending, activities, local business visitations, accommodations, group composition, and basic demographics (see Appendix).

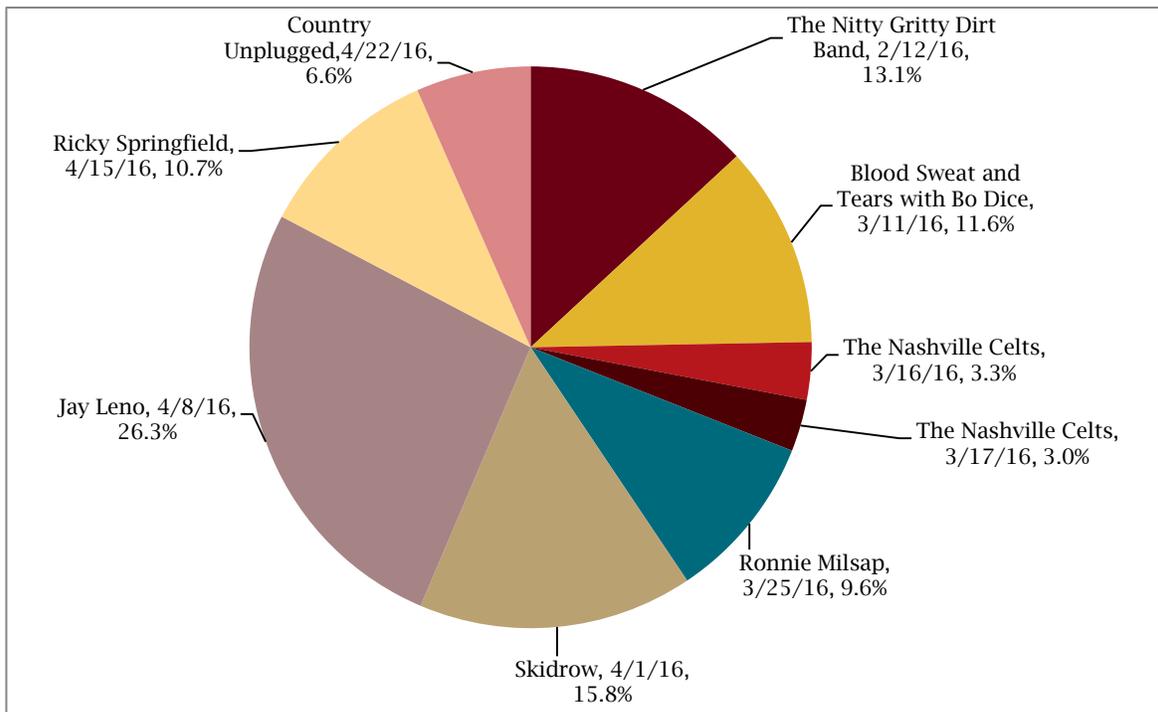
RESPONSE RATE

Throughout the three months of data collection, surveyors obtained a total of 335 questionnaires from event attendees and attempted to collect a similar number of surveys across all events. This was challenging, however, due to the setup at some events of pre-concert activities and variation in general popularity of the entertainers. More than 26% of responses were collected on April 8th (26.3%), 15.8% on April 1st, 13.1% on Feb 12th, 11.6% on March 11th, and 10.7% on April 15th (Figure 1). Each of the other four survey dates contributed between 3% and 9.6% of responses.

ANALYSIS

Completed questionnaires were entered in SPSS (version 23.0), a social science statistical analysis software program. Analysis provided frequencies, means, medians, and standard deviations (where applicable) to describe the sample and provide information on variables of interest. A customized trade area map was created based on the zip codes of visitors' primary residence.

Fig.1: Dates respondents completed the 2016 Shooting Star Casino event attendee survey (n=335)



RESULTS

RESPONDENTS

Demographics

Fifty-five percent of respondents were female (Figure 2). Close to 70% of respondents self-identified as White, and just over 32% self-identified as American Indian or Alaska Native (Figure 3).

Respondents' average age was close to 49 years old ($M=48.64$, $Mdn=49$, $SD=14.8$). Close to 22% of respondents were between the ages of 51 and 60, followed by a little more than 20% in the age range of 41-50 and 31-40 (Figure 4). Compared with White respondents, the proportion of American Indian respondents in the 18-30 and 31-40 age ranges was higher (Figure 5).

The household income of 37% of respondents was in the \$50,000-\$99,999 range, followed by 35.4% in the \$25,000-\$49,999 range (Figure 6). More than 13% of respondents had a household income less than \$25,000 (13.3%), while another 11.7% had a household income between \$100,000 and \$149,999. The proportion of American Indian respondents in the income range of \$25,000- \$49,999 and less than \$25,000 seemed to be greater than that of White respondents (Figure 7).

Fig 2: Gender of 2016 Shooting Star Casino event attendee survey respondents (n=331)

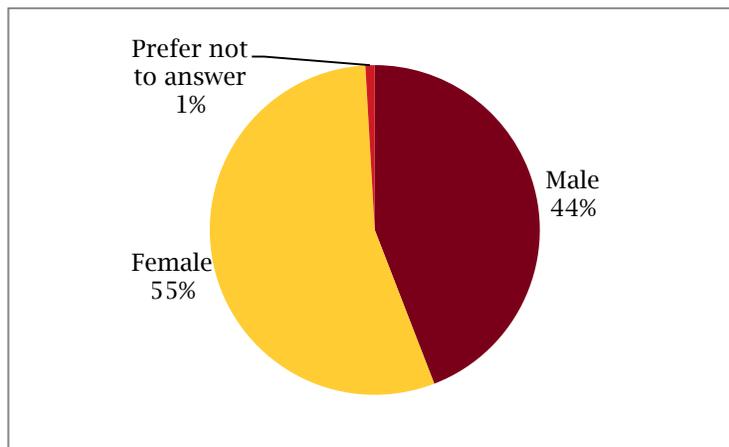


Fig. 3: Race of 2016 Shooting Star Casino event attendee survey respondents (n=335)

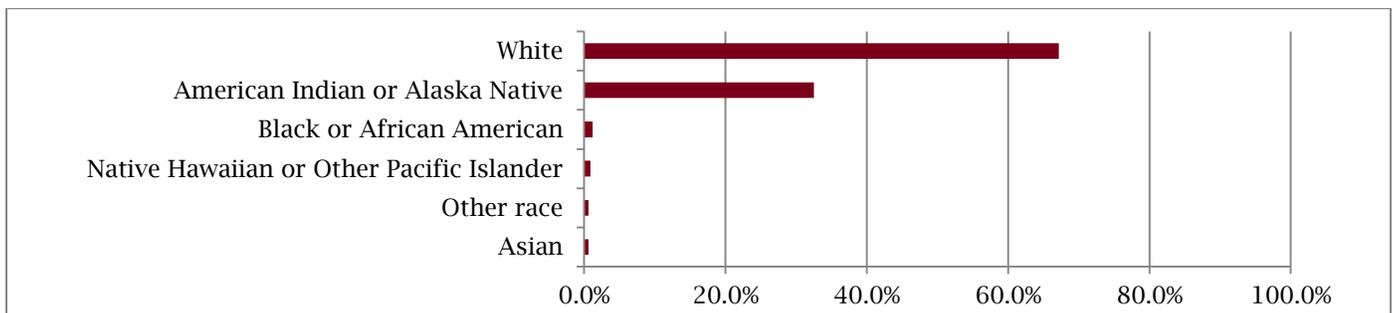


Fig. 4: Percentage of 2016 Shooting Star Casino event attendee survey respondents in various age brackets (n=277)

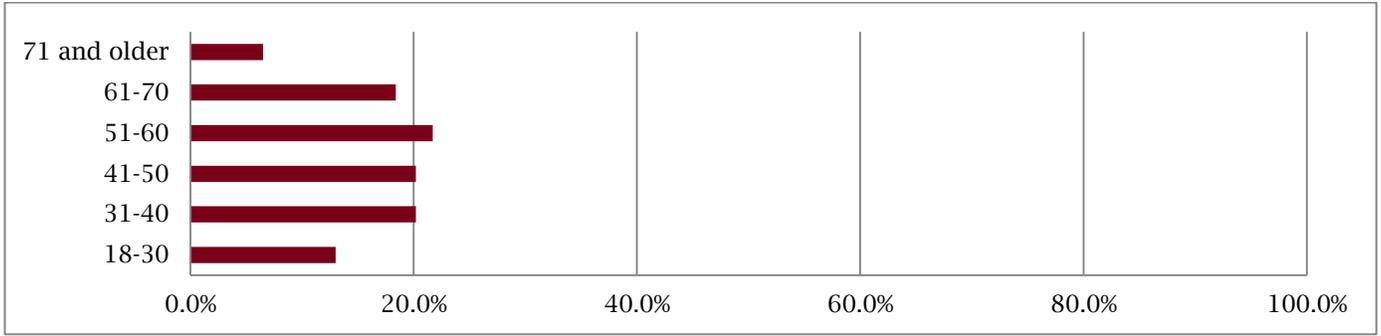


Fig 5: Age distribution of White and American Indian respondents to the 2016 Shooting Star Casino event attendee survey (n=277)

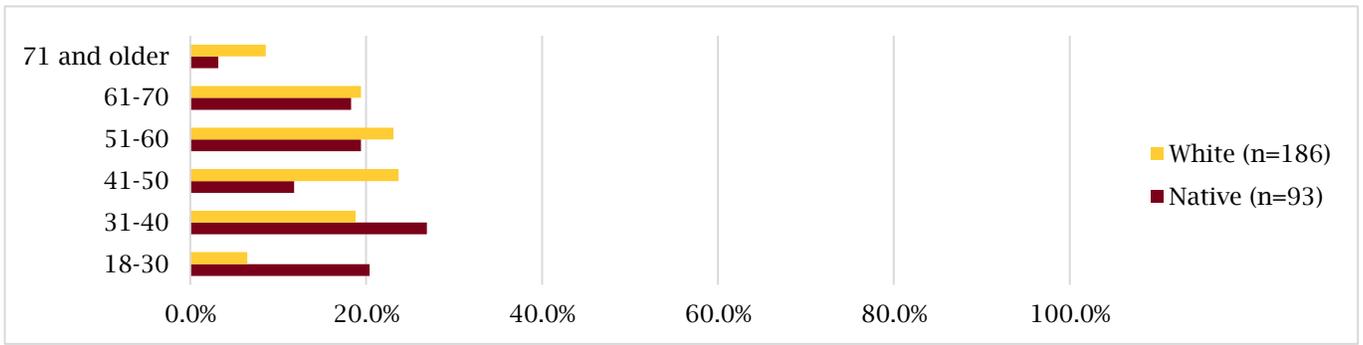


Fig. 6: Percentage of Shooting Star Casino event attendee survey respondents by income group (n=308)

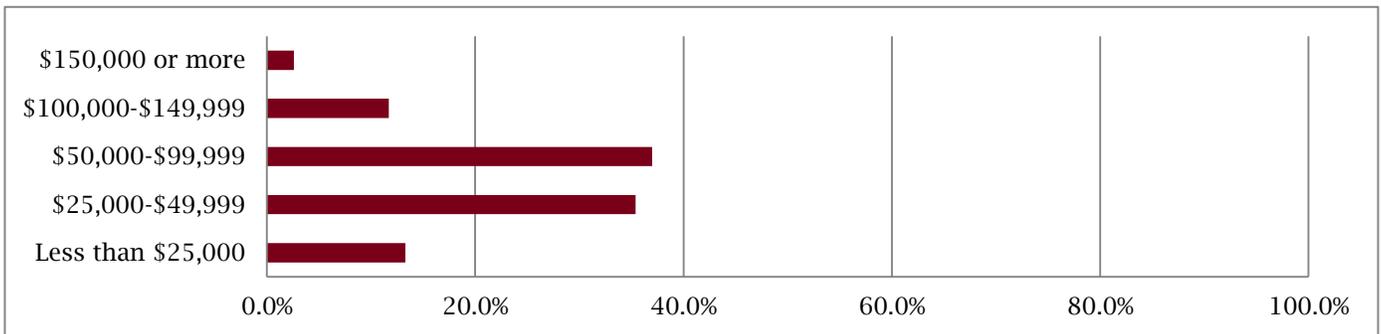
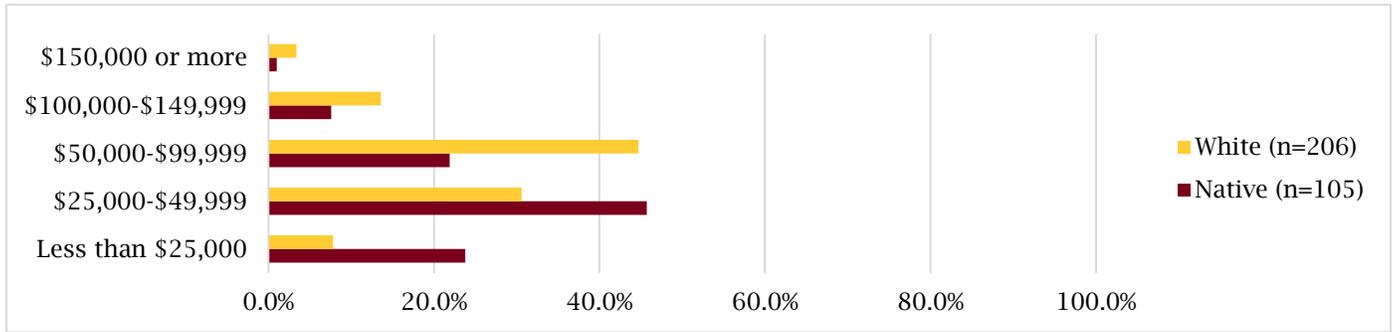


Fig 7: Percentage of White and American Indian respondents to the 2016 Shooting Star Casino event attendee survey by income (n=308)



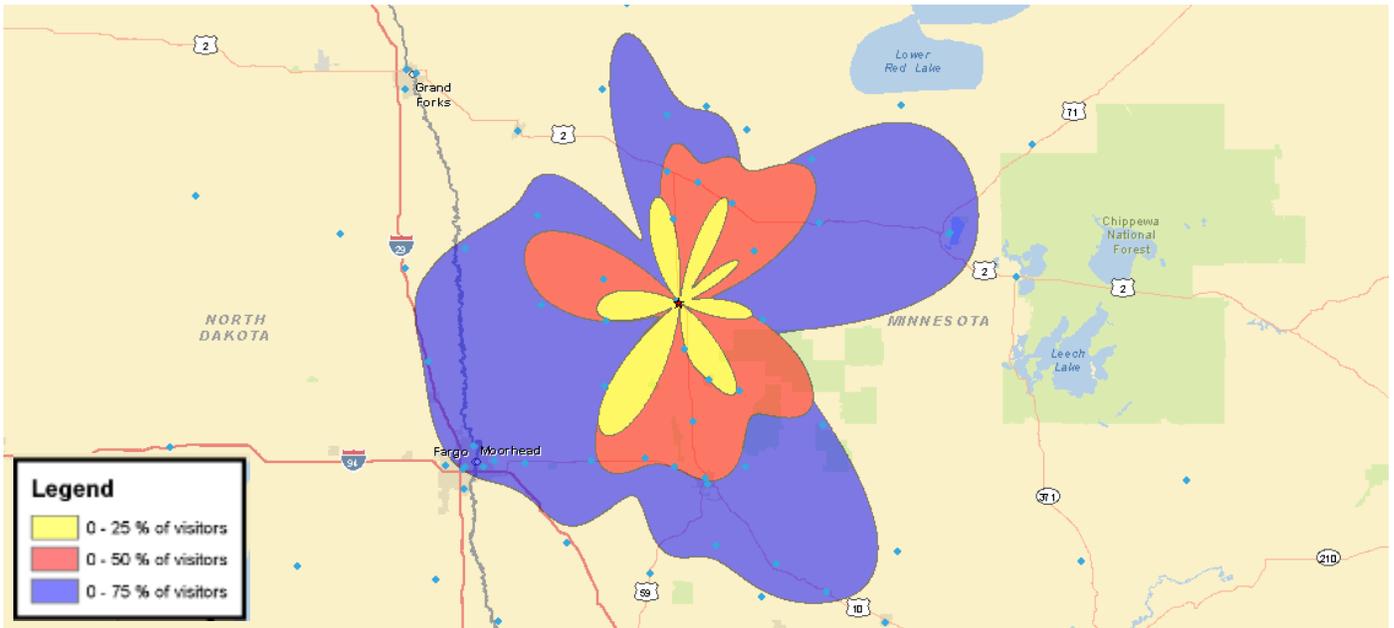
Primary residence

Eighty percent of respondents resided in the state of Minnesota, as indicated by a centroid analysis of the primary residence zip codes of respondents (Figure 8). Another 18% of respondents came from North Dakota (Table 1). Nearly 20% of respondents came from Mahnommen County (19.3%), followed by 14.2% from Becker County, 9.2% from Clearwater County, 8% from Cass County, North Dakota, and 7.0% from Otter Tail County (Table 1). The Fargo, ND-MN Core Based Statistical Area (CBSA) was home to 13.6% of respondents (Table 1). Close to 10% came from Grand Forks CBSA (9.2%), 7.0% from Fergus Falls CBSA, and 5.1% from Bemidji CBSA.

Table 1: Primary place of residence of 2016 Shooting Star Casino event attendee survey respondents (n=335)

Top 2 states		Top 5 counties		Top 4 Core Based Statistical Areas (CBSA)	
State	Percent (%)	County	Percent (%)	CBSA	Percent (%)
Minnesota	80.4	Mahnomen	19.3	Fargo, ND-MN	13.6
North Dakota	18.0	Becker	14.2	Grand Forks, ND-MN	9.2
		Clearwater	9.2	Fergus Falls, MN	7.0
		Cass, ND	8.2	Bemidji, MN	5.1
		Otter Tail	7.0		

Fig. 8: Trade area of 2016 White Earth visitor profile survey respondents (n=335)

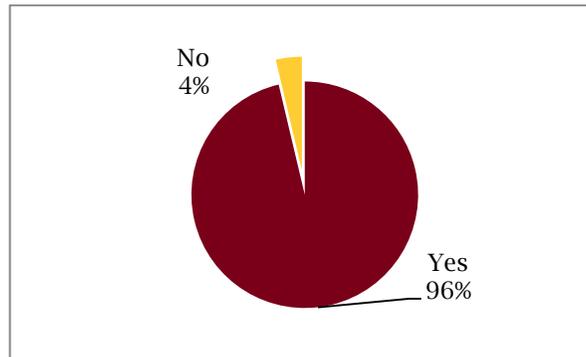


2016 SPRING TRIP INFORMATION

Primary destination

Shooting Star Casino was the primary destination for 96% of respondents (Figure 9).

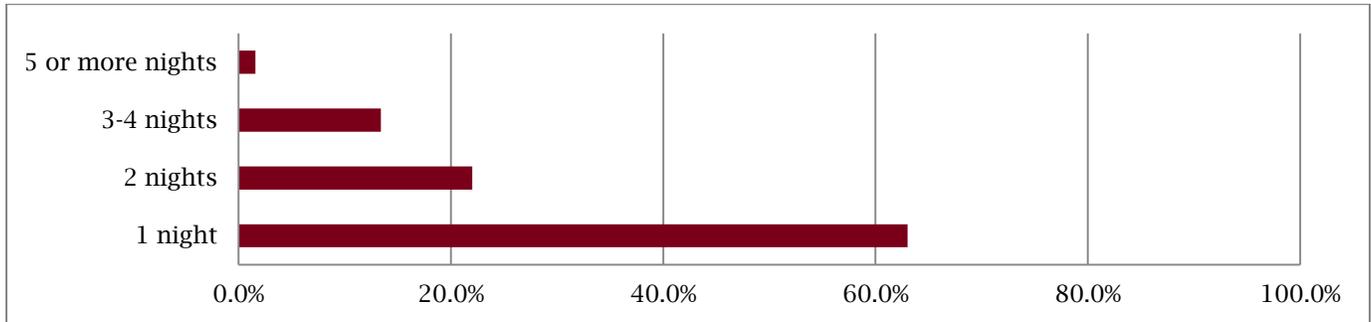
Fig. 9: Percentage of respondents indicating Shooting Star Casino was the primary destination (n=301)



Trip duration

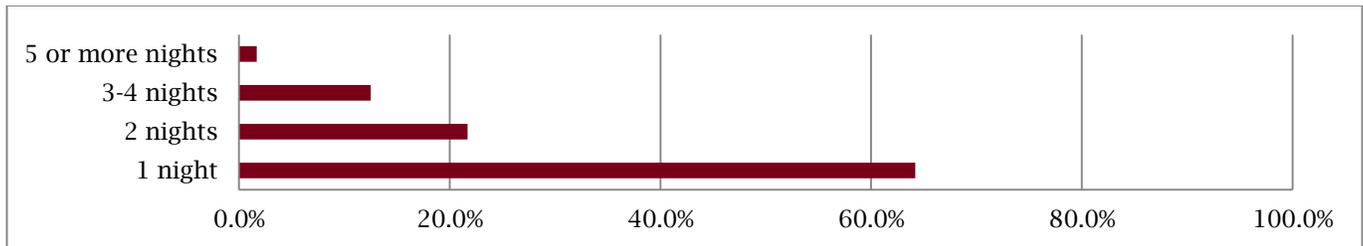
Fifty-nine percent of respondents took a day trip to Mahnomen. The other 41% stayed overnight. Of those who stayed overnight, 63% stayed one night, 22% stayed two nights, and 13.4% stayed three to four nights (Figure 11). On average, overnight respondents spent 1.65 nights during the trip ($M=1.65$, $Mdn=1$, $SD=1.19$).

Fig. 10: Total number of nights spent on the trip by respondents to the 2016 Shooting Star Casino event attendee survey (n=127)



Among respondents who stayed overnight in Mahnomen, 64.2% stayed one night, 21.7% stayed two nights, and 14.2% stayed three or more nights (Figure 12). On average, respondents who spent overnight in Mahnomen stayed 1.62 nights ($M=1.62$, $Mdn=1$, $SD=1.17$).

Fig. 11: Number of nights spent in Mahnomen by respondents to the 2016 Shooting Star Casino event attendee survey (n=120)



Group composition and size

The average concert attendee traveled in a group of three people ($M=2.96$, $Mdn=3$, $SD=4.05$). Specifically, 53.7% of respondents traveled in groups of two, 11.7% in groups of three, 13.7% in groups of four, and 12.4% alone (Figure 13).

Close to half of respondents (46%) traveled with adults 51-69 years old, and 35.8% traveled with adults 36-50 years old. About 20% traveled with adults 26-35 years old (Figure 14). Only 2.4% traveled with those under 18 years old.

Fig. 12: Travel group size of respondents to the 2016 Shooting Star Casino event attendee survey (n=315)

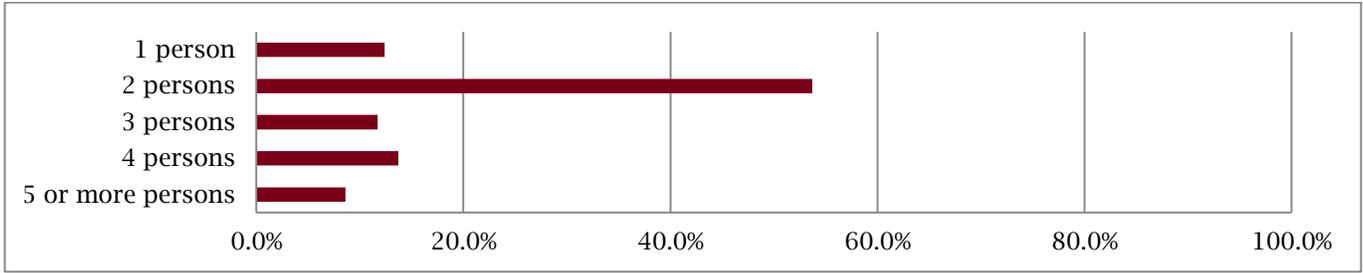
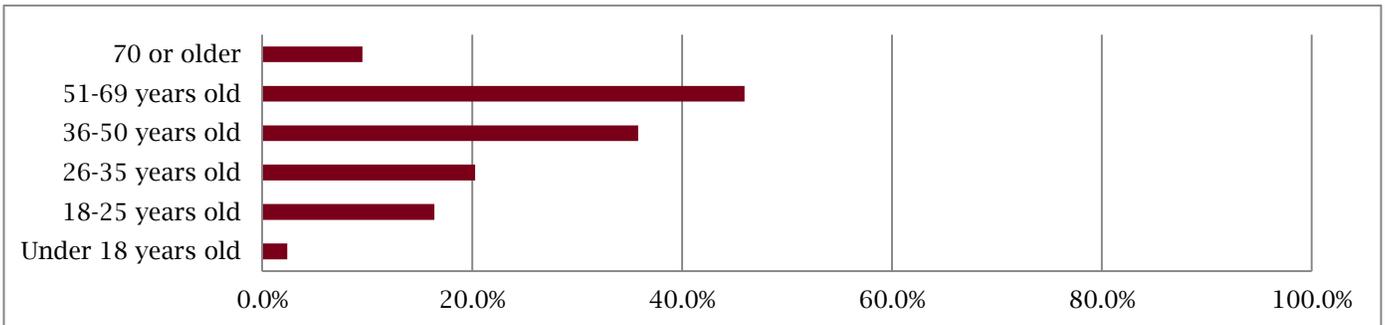


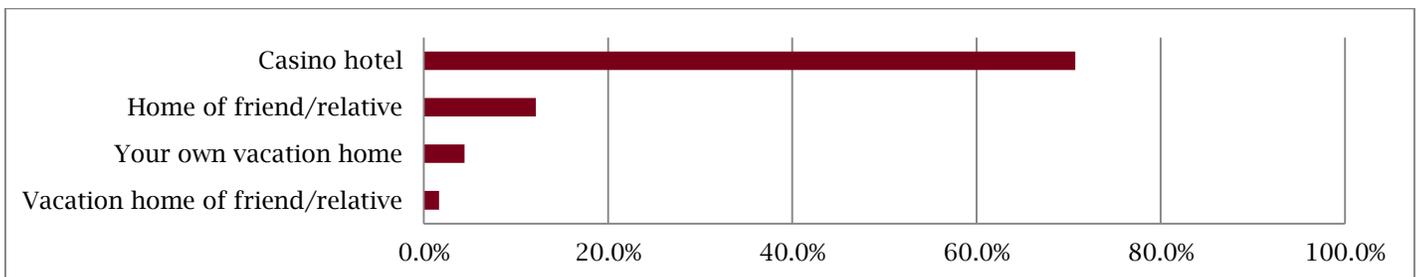
Fig. 13: Age groups in the travel party of respondents to the 2016 Shooting Star Casino event attendee survey



Lodging

The most frequently chosen lodging facility for those staying overnight was the Shooting Star Casino hotel (70.7%), followed distantly by the home of a friend or relative (12.2%; Figure 15). Fewer than 5% stayed in their vacation home (4.4%) or the vacation home of a friend/relative (1.7%).

Fig. 14: Lodging type among overnight respondents to the 2016 Shooting Star Casino event attendee survey (n=181)



Visitor spending

The average respondent spent the most on casino gaming, followed by lodging, restaurants, and event-related expenditures (Table 2). Specifically, the average respondent spent approximately \$68 on casino gaming ($M=67.74$, $Mdn=25$, $SD=130.36$), close to \$15 on lodging ($M=14.62$, $Mdn=0$, $SD=38.06$), \$13 on restaurants ($M=13.16$, $Mdn=0$, $SD=25.09$), and another \$13 on event-related expenditures ($M=13.02$, $Mdn=0$, $SD=28.34$) per day. The average total personal spending within a 24-hour period was close to \$135 ($M=134.64$, $Mdn=70$, $SD=267.94$).

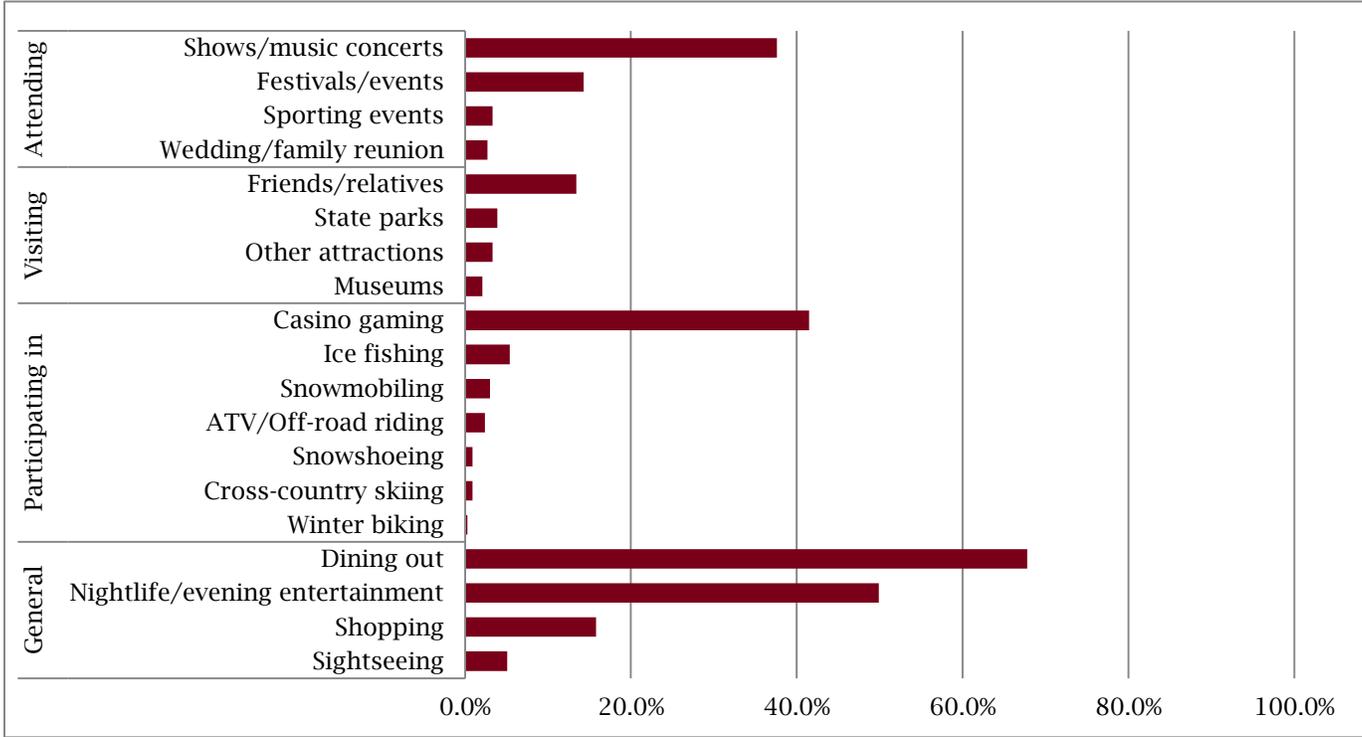
Table 2: Descriptive statistics of spending per person per day in various categories by respondents to the 2016 Shooting Star Casino event attendee survey (n=328)

	Mean (\$)	Median (\$)	Standard Deviation
Casino Gaming	67.74	25.00	130.36
Lodging	14.62	0.00	38.06
Restaurant	13.16	0.00	25.09
Event Related	13.12	0.00	28.34
Transportation	7.92	0.00	20.93
Shopping	6.04	0.00	62.59
Miscellaneous	6.02	0.00	61.20
Recreation	3.03	0.00	17.18
Groceries	2.99	0.00	13.74
Total	134.64	70.00	267.94

TRIP ACTIVITIES

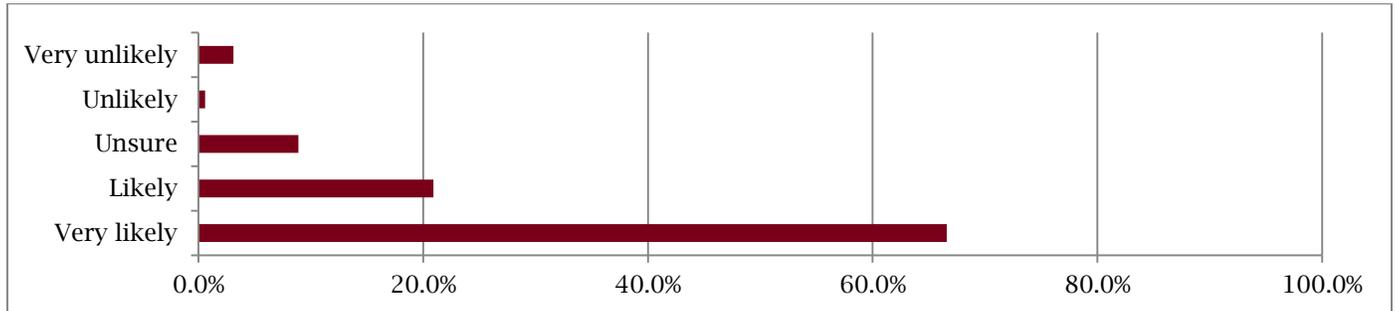
The most frequently identified trip activities included dining out (67.8%), nightlife/evening entertainment (49.9%), casino/gaming (41.5%), and shows/music concerts (37.6%; Figure 16). About 15% of respondents reported shopping as a trip activity, 14.3% attended festivals and events, and 13.4% visited friends and relatives. For comparison, Explore Minnesota Tourism recently found that the average traveler in Minnesota spent 23.5% of total spending on food, 2% on lodging, and 17% on retail (Explore Minnesota Tourism, 2016).

Fig. 15: Activities participated in among the 2016 Shooting Star Casino event attendee survey respondents



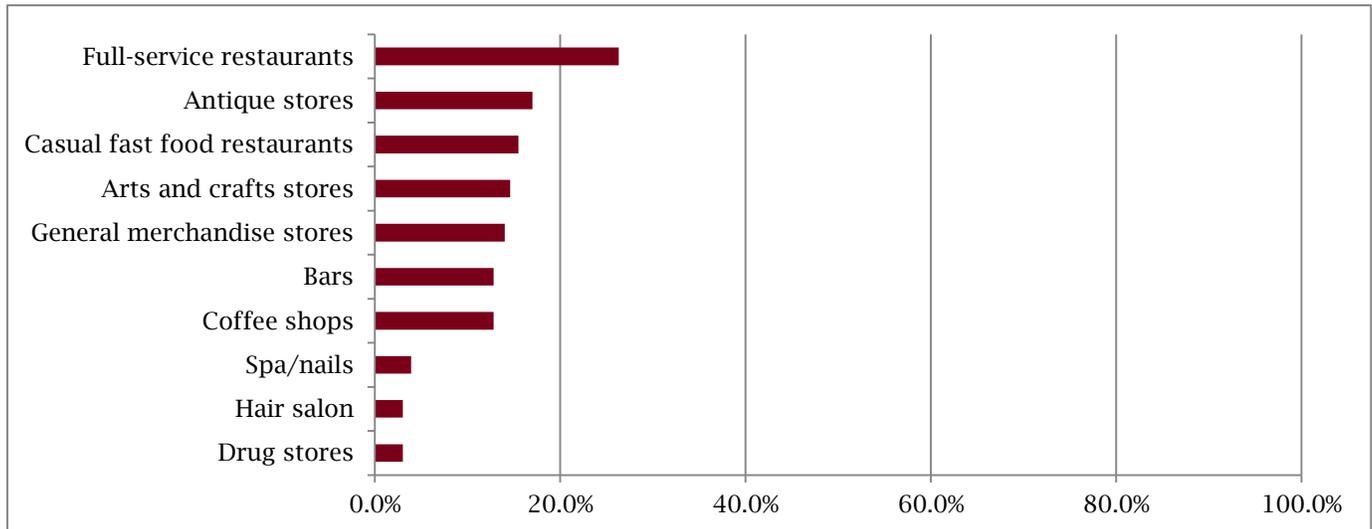
When asked about the likelihood of attending another show at Shooting Star Casino within the next 12 months, 66.6% indicated they were very likely to do so and another 20.9% indicated they were likely to do so (Figure 17).

Fig 16: Respondents' likelihood of attending another show at Shooting Star Casino in the next 12 months (n=326)



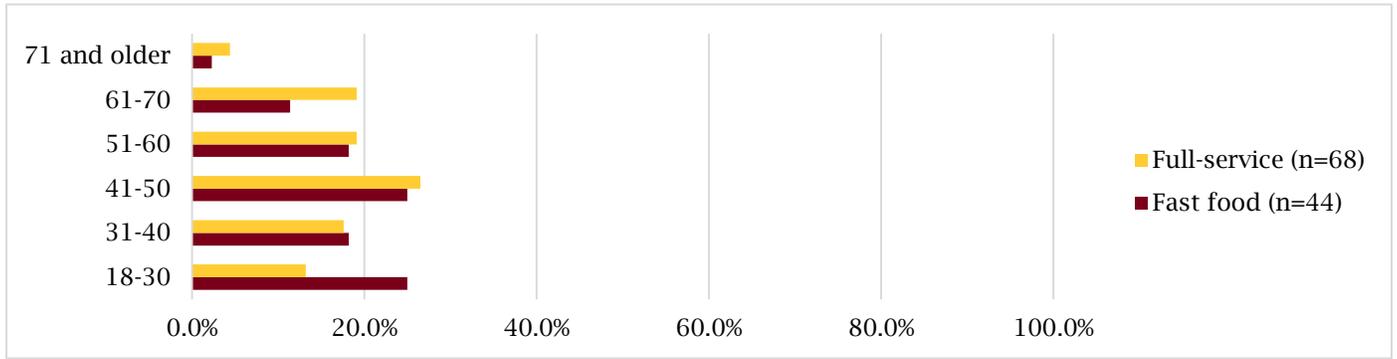
Sixty-six percent of respondents did not visit downtown Mahanomen or any business along the Highway 59 Corridor. When asked what kinds of businesses would attract them to the downtown area, 26.3% identified full-service sit-down restaurants (Figure 19), 17% identified antique stores, 15.5% identified casual fast food restaurants, 14.6% identified arts and crafts stores, and 14% identified general merchandise stores. Close to 13% also identified bars (12.8%) and coffee shops (12.8%).

Fig. 17: Types of businesses that would attract respondents to downtown Mahanomen (n=335)



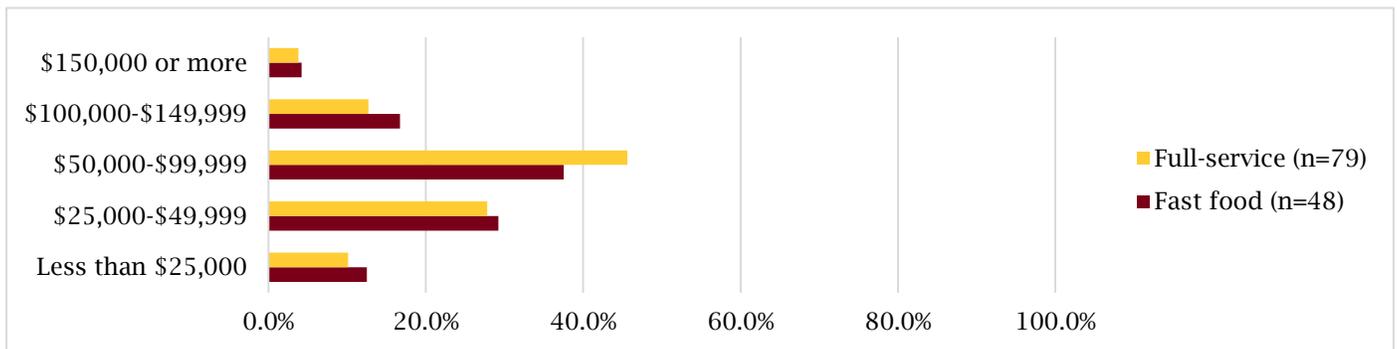
Respondents in the 18-30 age range preferred fast food (25%) over full-service restaurants (13.2%; Figure 20). The proportion of respondents in the 61-70 age range who preferred fast food restaurants was 11.4% while 19.1% preferred full-service restaurants. The proportion of respondents in the 31-40, 41-50, and 51-60 age ranges was comparable for full-service and fast food restaurants.

Fig 18: Age distribution of respondent food service preferences



Respondents' dining preferences also varied by income. The proportion of respondents in the \$50,000-\$99,999 income range was 45.6% for full-service restaurants versus 37.5% for fast food restaurants (Figure 21). The proportion of respondents in the \$100,000-\$149,999 income range was 12.7% for full-service restaurants versus 16.7% for fast food restaurants. The proportion of respondents in the less than \$25,000, \$25,000-\$49,999, and \$150,000 or more income ranges was comparable.

Fig 19: Restaurant preferences of respondents by income



DISCUSSION

Survey findings provide some understanding of event attendee preferences and behavior at Shooting Star Casino. They also provide suggestions for ways Mahnomen and the White Earth Nation can attract more visitors to the casino or other parts of the community.

Demographic Characteristics of Event Attendees

According to survey results, White respondents were older and wealthier, and American Indian respondents were younger with lower household income. While these patterns are consistent with census data, it is important to understand the interests and tastes of the younger generations as well. They are a potential market segment that both downtown Mahnomen and Shooting Star Casino can target now and in the future.

In this survey, about one-third of respondents were American Indian, but they comprise at least 40% of the population in Mahnomen County. There are several potential reasons for this underrepresentation. First, it is possible that the particular events surveyed primarily attracted White attendees. Second, recall that American Indian respondents were younger than White respondents. It is possible the particular entertainers performing at the surveyed events mainly attract an older audience, reflecting generational differences in entertainer preference. Third, as American Indian respondents tended to have a lower household income than White respondents, it is possible the cost of event tickets was prohibitive to lower-income American Indians. To reach out to potential event attendees from lower-income families, the casino could partner with art and performance-related organizations to sell less expensive tickets to events.

Analysis of respondent zip codes made it clear the casino draws regional residents from West Central Minnesota and Eastern North Dakota. The casino should consider targeting its promotional efforts to the counties and metropolitan areas where a large percentage of respondents live (e.g., Fargo, North Dakota).

Trip Duration and Preferred Activities

Dining out and nightlife/evening entertainment were the most frequent activities among respondents. Since visitors expressed a desire to have a full-service restaurant downtown, the city should consider the feasibility of opening one. Among respondents who suggested including a full-service restaurant, the largest age range was 41-50, followed closely by 51-60 and 61-70. It is also worth noting that event attendees in the 18-40 age range have a greater preference for casual dining/fast food restaurants than respondents who are older than 40 (Figure 18). Learning more about these market segments can strengthen economic linkages across sectors in the local economy and improve marketing and development decisions.

Offering two-to-three day vacation packages that include coupons to downtown businesses and events for overnight visitors staying is an option to consider. Doing so may increase visitors' length of stay and attract them to the downtown area. These packages could be promoted in the players club at the casino, using a points system to encourage gaming visitors to stay in the area and spend money at local businesses. Shooting Star Casino, in partnership with the White Earth Nation and city of Mahnomen, are critical players in this effort.

If encouraging casino event attendees to participate in more activities downtown is important, the city could work with White Earth Nation and the casino to promote dining and nightlife opportunities in the city, as well as shops and festivals. Traveling exhibits at the museum and art shows at Gizhiigin Arts Accelerator are also ideas worth considering. Since the majority of overnight visitors stayed at the casino hotel, placing marketing information in hotel rooms or advertising it on the in-room TV system would be an effective way to feature these opportunities and encourage visitors to explore activities in the area.

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APPENDIX

**University of Minnesota Tourism Center
WHITE EARTH CASINO EVENT ATTENDEE QUESTIONNAIRE**

Is Shooting Star Casino your primary destination for this trip? Yes No, final destination is _____

What is the **primary** reason that you made this trip to Mahnomen? (Check ONLY 1)

- Concert/show Casino gaming Sporting events Attraction/family fun
 Business/convention/meeting Outdoor recreation Visit family/friends Museum/historical sites

How many people (including you) are in your travel party on this trip? _____

How many, including yourself, in your group are (specify number in each age category):

- ____ Under 18 years old ____ 18 - 25 years old ____ 26 - 35 years old
 ____ 36 - 50 years old ____ 51 - 69 years old ____ 70 or older

How many total nights do you plan to spend away from home on this trip? ____nights day trip only

How many of these nights will be in the Mahnomen Area? ____nights day trip to area only

If you are staying in Mahnomen, how many nights are you staying in each the following types of accommodations?

- ____ Casino hotel ____ Home of friend/relative ____ Your own vacation home
 ____ Vacation home of friend/relative ____ Vacation rental by owner

Please estimate your travel group's **spending** in the Mahnomen Area for the **last 24 hours** of your stay.

- Lodging \$ _____ Transportation (includes gas) \$ _____ Shopping \$ _____
 Groceries \$ _____ Restaurants/Bars \$ _____ Recreation/attractions \$ _____
 Event related \$ _____ Casino gaming: \$ _____ Misc. \$ _____

How many people (including you) are included in your spending estimate? _____

How likely are you to attend another show in the Casino in the next 12 month? (Check ONLY 1)

- Very likely Likely Unsure Unlikely Very unlikely

While on this trip, which of the following activities have members of your travel party participated in or will participate in? (Check **all that apply**)

- | | | | |
|--|---|--|---|
| <i>General:</i> | <i>Participating in:</i> | <i>Visiting:</i> | <i>Attending:</i> |
| <input type="checkbox"/> Dining out | <input type="checkbox"/> Ice fishing | <input type="checkbox"/> Museums | <input type="checkbox"/> Festivals/events |
| <input type="checkbox"/> Sightseeing | <input type="checkbox"/> Cross-country skiing | <input type="checkbox"/> State parks | <input type="checkbox"/> Sporting events |
| <input type="checkbox"/> Shopping | <input type="checkbox"/> Snowmobiling | <input type="checkbox"/> Friends/relatives | <input type="checkbox"/> Shows/music concerts |
| <input type="checkbox"/> Nightlife/evening entertainment | <input type="checkbox"/> Snowshoeing | <input type="checkbox"/> other attractions | <input type="checkbox"/> Wedding/family reunion |
| | <input type="checkbox"/> Winter biking | | |
| | <input type="checkbox"/> Casino gaming | | |
| | <input type="checkbox"/> ATV/Off-road riding | | |

During this trip, have you visited or do you plan to visit downtown Mahnomen **OR** any business along Highway 59 Corridor? Yes No

If **NO**, what types of business would attract you to Downtown Mahnomen? (check **all that apply**)

- Full-service sit-down restaurants Antique stores Arts and crafts stores Coffee shops Bars
 Casual fast food restaurants Drug stores General merchandise stores Hair salon Spa/nails

Finally, a few questions about you.

What is your zip code? _____ In what year were you born? 19____

What is your gender? Female Male Prefer not to answer

What is your annual household income (before taxes)?

- Less Than \$25,000 \$25,000-49,999 \$50,000-\$99,999 \$100,000-149,999 \$150,000 or more

What is your race? (check all that apply)

- American Indian or Alaska Native Asian Black or African-American White
 Native Hawaiian or Other Pacific Islander Other (Explain: _____)

Thank you for your participation!

Date

Time