

**The Economic Impact of
Expenditures By Travelers
On Minnesota's Northcentral/West Region
and The Profile of Travelers**

June 2005 – May 2006

Prepared for:

Explore Minnesota Tourism
State of Minnesota



UNIVERSITY OF MINNESOTA



and

Minnesota Heartland Tourism Association

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1.0 Introduction

This is the first report of the Economic Impact of Traveler Expenditures on the Northcentral/West Region prepared by *Davidson-Peterson Associates*. This report covers traveler expenditures made in the Northcentral/West Region during the 12-month period from June 2005 through May 2006.

The purpose of this study is to measure the economic benefits the Northcentral/West Region residents and governments derive from the dollars spent by travelers in the region.

These economic benefits include:

- **Total expenditures** made by travelers;
- Number of **full-time equivalent jobs** supported by these expenditures;
- **Wages, salaries and proprietary income** earned by area residents as a result of these expenditures; and
- **State and local government revenues** generated by traveler expenditures.

The economic impact estimates in this report may be used to document the importance of tourism as a key segment of the Northcentral/West Region's economy; to underscore the need to continue to support the expenditure of time, effort and dollars to promote tourism growth; and to track the results of the Northcentral/West Region's tourism marketing efforts.

In addition, the traveler on-site interviews used in the economic impact analysis are presented as a traveler profile in the last section of this report.

Please refer to the Appendix for a description of the procedures used in executing this study and for definitions of the terms used.

2.0 Executive Summary

2.1 Introduction

Davidson-Peterson Associates was hired to conduct a year-long study which was a joint project with Explore Minnesota Tourism, the University of Minnesota Tourism Center^{*} and the Minnesota Arrowhead, Minnesota Heartland and Southern Minnesota Tourism Associations and the Metro Tourism Committee. Davidson-Peterson Associates was commissioned to conduct a “bottom up” analysis of traveler expenditures in Minnesota and their impact on the economy of the state during the period June 2005 through May 2006. The analysis is based on the following surveys:

- Telephone interviews were conducted with a random sample of accommodations managers in the Northcentral/West Region upon conclusion of each season. During the 12-month period a total of 2,375 interviews were completed statewide, 543 of which were completed in this region.
- Self-administered questionnaires were completed by 2,292 Minnesota travelers who were either staying overnight or had traveled at least 50 miles from home on a day trip. These questionnaires were completed during each of the four seasons and in each of the four regions. Please refer to Appendix A: Procedures (Section D.5) for more detailed information on the sampling approach by region.
- A total of 1,001 telephone interviews were conducted with a probability sample of Minnesota households equally divided among the four seasons.

Total estimated traveler expenditures by category of expense were provided to Dr. William Shaffer of Georgia Tech to develop an input-output model based on the Northcentral/West Region’s economy. The input-output model estimated the number of

^{*} The University of Minnesota Tourism Center is a collaboration of the College of Food, Agricultural and Natural Resource Sciences and the University of Minnesota Extension Service.

full-time equivalent jobs, wages/salaries/proprietary income, and state and local government revenues supported by traveler expenditures.

Additionally, Davidson-Peterson Associates used the self-administered questionnaires conducted among Minnesota travelers over the course of the 12-month period in the Northcentral/West Region to provide a traveler profile for that region. In total, 594 interviews were conducted in the Northcentral/West Region. Using the findings from the state economic impact study, the sample was balanced across *regions* and *seasons*. The Northcentral/West Region traveler profile results are based on a weighted sample of 481.

2.2 The Findings

In total, travelers in the Northcentral/West Region spent \$2.410 billion in the region. More than half of the region's traveler expenditures were spent by travelers staying overnight in hotels/motels/B&Bs. Almost half of total traveler expenditures were spent in the summer season.

The \$2.410 billion spent in the Northcentral/West Region from June 2005 through May 2006 supported 59,300 full-time-equivalent jobs, \$1.1 billion in resident income (wages, salaries and proprietary income), \$297.8 million in state government revenues and \$98.5 million in local government revenues.

The Northcentral/West Region received 8.6 million person-visits during the period June 2005 through May 2006. Some 1.1 million person-visits were by travelers on day trips and the balance were made by travelers staying overnight in the Northcentral/West Region (7.49 million). One third of all visits were by travelers staying in hotels/motels/B&Bs (31%) with nearly as many staying with friends and relatives (30%). Campgrounds (15%) and resorts (10%) accommodated the balance.

Some 270 hotels/motels/B&Bs with 10,500 rooms offered 3.78 million roomnights and sold 2.34 million to guests staying fewer than 30 nights during the period of June 2005 through May 2006. As noted, travelers staying in these rooms made the largest contribution to the traveler expenditures in the Northcentral/West Region.

A total of 565 resorts with 6,250 units made 1.43 million unitnights available and sold 0.86 million of them to guests staying fewer than 30 nights during the 12-month period.

A total of 348 campgrounds on both public and private lands with 11,802 sites made those sites available for 2.27 million site-nights and sold 1.03 million to guests staying fewer than 30 nights.

Those numbers led to occupancy rates of 62% for hotels/motels, 60% for resorts and 46% for campgrounds.

According to managers' estimates, two out of three guests who stayed in the Northcentral/West Region properties were Minnesota residents – 65% in hotels/motels/B&Bs, 66% in campgrounds and 76% stayed in resorts.

Managers estimated that hotel/motel/B&B guests came on average in parties of two and stayed two nights; resort guests came in parties of four and stayed four nights on average, and campers came in parties of three and stayed three nights on average.

The table on the following page summarizes the industry highlights for the period June 2005 through May 2006.

2.3 The Northcentral/West Region Lodging and Campground Industry Highlights

Table 2.3

The Northcentral/West Region Lodging and Campground Industry Highlights

June 2005 through May 2006

	<u>Hotels/Motels/ B&Bs</u>	<u>Resorts</u>	<u>Campgrounds</u>
Number of properties	270	565	348
Number of rooms/units/sites	10,510	6,250	11,802
Total available roomnights/unit-nights/sitenights (millions)	3.78	1.43	2.27
Total occupied roomnights/unit-nights/ sitenights (millions)	2.34	0.86	1.03
Average occupancy rate	62%	60%	46%
Average daily room rate	\$72.12	--	--
Average unit rate	--	\$143.59	--
Average site rate	--	--	\$23.38
MANAGEMENT'S ESTIMATES:			
Average party size	2.06	4.18	3.14
Average length of stay	1.90	4.28	2.77
Guest Origin			
<u>Out of State</u>	<u>35%</u>	<u>28%</u>	<u>34%</u>
U.S.	28%	28%	30%
Canada	7%	*	4%
Other foreign	*	*	*
Minnesota	65%	72%	66%
Trip Purpose¹			
Pleasure	54%	98%	--
Business	34%	2%	--
Meeting/convention	12%	1%	--

Note: Length of stay as noted throughout this document represents the average number of nights spent in a single property. It does not necessarily reflect the total number of nights spent in Minnesota. Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%

¹ These statistics not collected for campers

3.0 Estimates of Traveler Expenditures in Minnesota

3.1 Summary

Travelers to the Northcentral/West Region during the period of June 2005 through May 2006 spent **\$2.410 billion** in the region.

- More than one half of those dollars were spent by travelers staying at hotels/motels/B&Bs and resorts.
- Food, shopping and recreation account for three-quarters of all dollars spent by travelers.
- Almost half the dollars were spent during the summer.

3.2 Overall Expenditures

The Northcentral/West Region travelers spent an estimated total of **\$2.410 billion** in the period June 2005 through May 2006.

3.3 Estimated Traveler Expenditures By Accommodation Type

Almost one-third of the total estimated traveler expenditures, \$713.9 million (30%), were spent by travelers staying overnight in the Northcentral/West Region at hotels/motels/B&Bs.

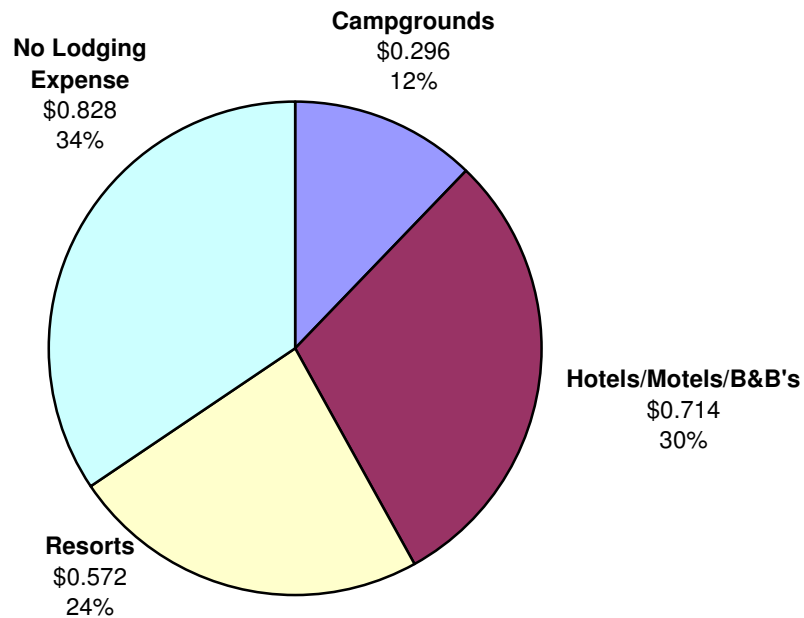
Those staying in resorts in the Northcentral/West Region spent \$571.88 million (24%), and those camping spent \$295.86 million (12%).

Travelers with no lodging expenses spent \$828.27 million, or 34% of the Northcentral/West Region's traveler expenditures.

- Travelers who stayed at the homes of family and/or friends spent \$765.61 million (32%) while visiting the Northcentral/West Region.
- Those visiting just for the day or passing through the Northcentral/West Region spent \$62.66 million (3%).

Figure 3.3

Estimated Northcentral/West Region Traveler Expenditures
By Accommodation Type
June 2005 – May 2006
(\$ Billions)



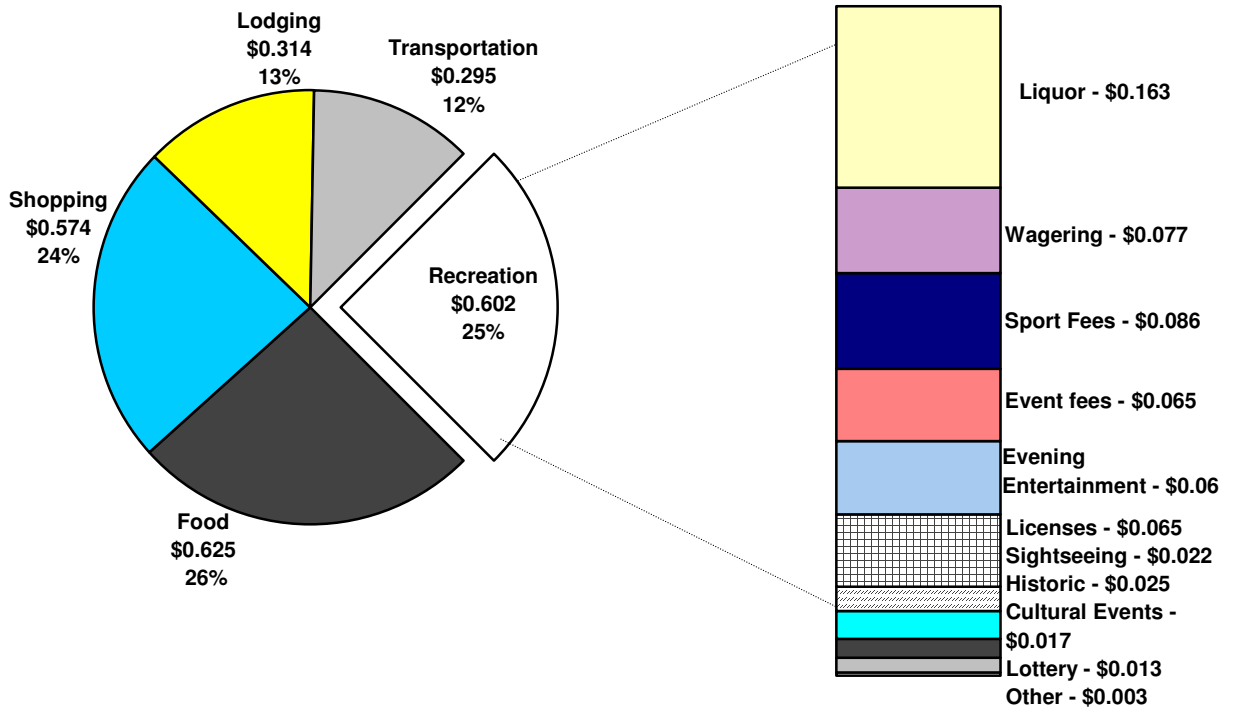
Total: \$2.410 Billion

3.4 Estimated Traveler Expenditures By Category of Expenditure

Shopping, food and recreation each accounted for about one quarter (24%-26%) of traveler expenditures.

Lodging expenses represented 13% of the total estimated traveler expenditures (\$314.06 million). Twelve percent of the Northcentral/West Region traveler expenditures (\$295.45 million) were spent on transportation.

Figure 3.4
Estimated Northcentral/West Region Traveler Expenditures
By Category of Expenditure
June 2005 – May 2006
(\$ Billions)



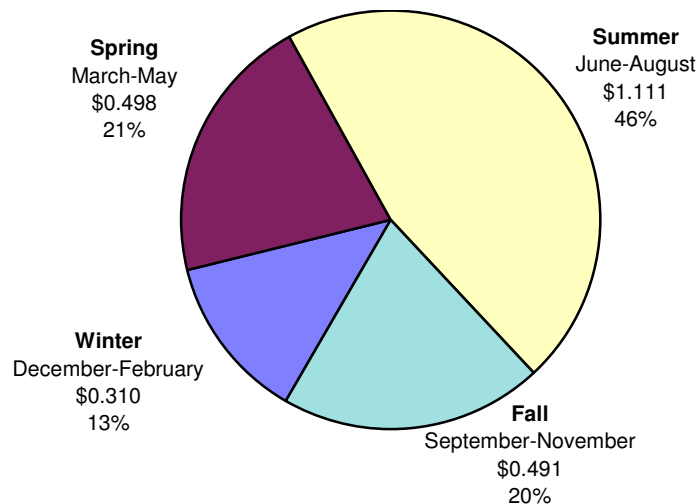
Total: \$2.410 Billion

3.5 Estimated Traveler Expenditures By Season

Travelers spent \$1.111 billion, or 46% of all traveler expenditures in the summer season (June through August). They spent \$490.79 million, or 20% of all traveler expenditures, in the fall season (September through November) and \$498.44 million, or 21% of all traveler expenditures in the spring season (March through May). Finally, travelers spent \$309.87 million, or 13% of total traveler expenditures, in the winter season (December through February).

Figure 3.5

Estimated Traveler Expenditures
By Season
June 2005 – May 2006
(\$ Billions)



Total: \$2.410 Billion

4.0 The Impact of Traveler Expenditures On The Northcentral/West Region

4.1 Summary

The estimated expenditures by travelers in the Northcentral/West Region during the period June 2005 through May 2006 supported 59,300 full-time equivalent jobs and provided residents with wages, salaries and proprietary income of \$1.1 billion. Traveler expenditures also generated \$297.8 million in state government revenues and \$98.5 million in local government revenues.

4.2 Direct and Total Impact: An Explanation

In the text and figures which follow to describe the impact of traveler expenditures on Minnesota, both direct and total impacts are mentioned.

- **Direct** impacts are those economic benefits due directly to the traveler expenditures. For example, when traveler expenditures pay the salary and benefits for a hotel desk clerk, that amount would be considered in the direct impact for both jobs and wages.
- **Total** impacts include all of the direct impacts, but also include the estimated indirect impacts. Indirect impacts are the additional jobs and wages supported during additional rounds of spending. For example, the front desk clerk pays income tax and property tax which are an indirect result of tourist expenditures. The front desk clerk also pays her utility bills, buys food for her family, shops for gifts, etc. Those dollars create the indirect impact of the initial traveler expenditures through many additional rounds of spending in the economy.

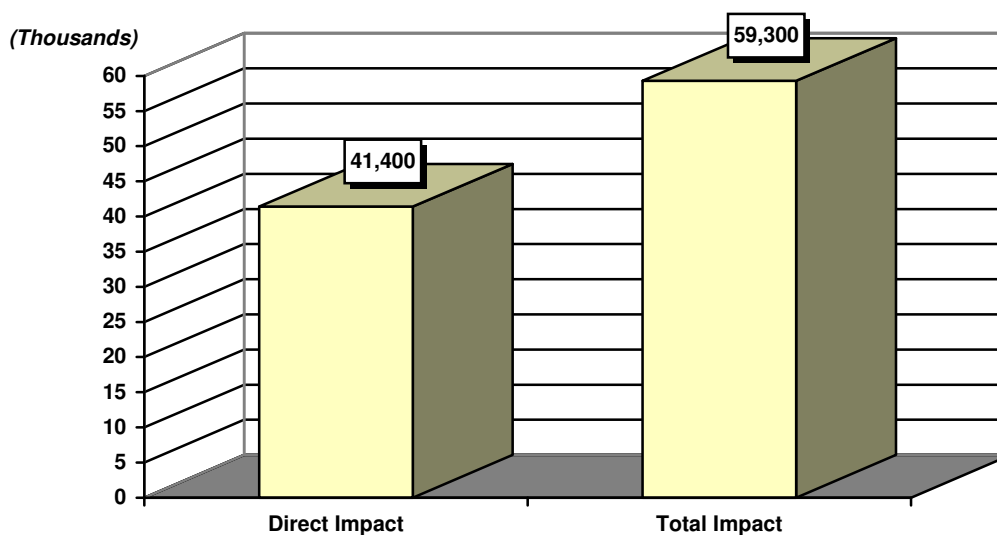
As noted, this report includes direct impacts and total impacts (the total of both direct and indirect impacts).

4.3 Impact on Jobs for the Northcentral/West Region

During the period June 2005 through May 2006, traveler expenditures in the Northcentral/West Region supported 59,300 full-time equivalent jobs in **total**. About two-thirds of these jobs (70%) were **directly** supported by total estimated traveler expenditures in The Northcentral/West Region (41,400).

Figure 4.3

Resident Employment Impact of Traveler Expenditures June 2005 through May 2006

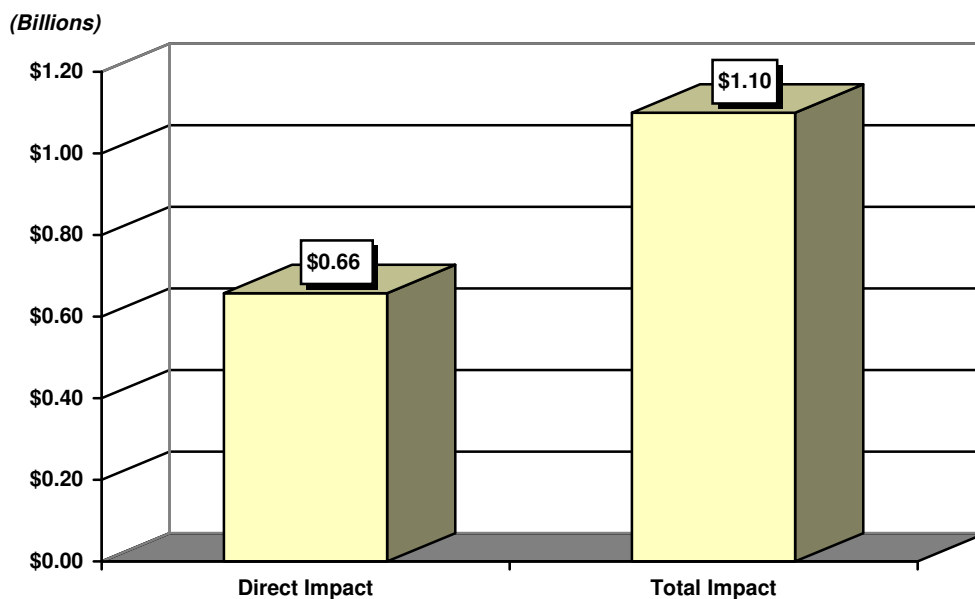


4.4 Impact on Wages, Salaries and Proprietary Income for the Northcentral/West Region

Traveler expenditures in the Northcentral/West Region during the period June 2005 through May 2006 generated \$1.1 billion in resident wages and proprietary income in **total**. Three-fifths of this resident income was **directly** generated by traveler expenditures (\$657.3 million or 60%).

Figure 4.4

Resident Income Impact of Estimated Traveler Expenditures June 2005 through May 2006



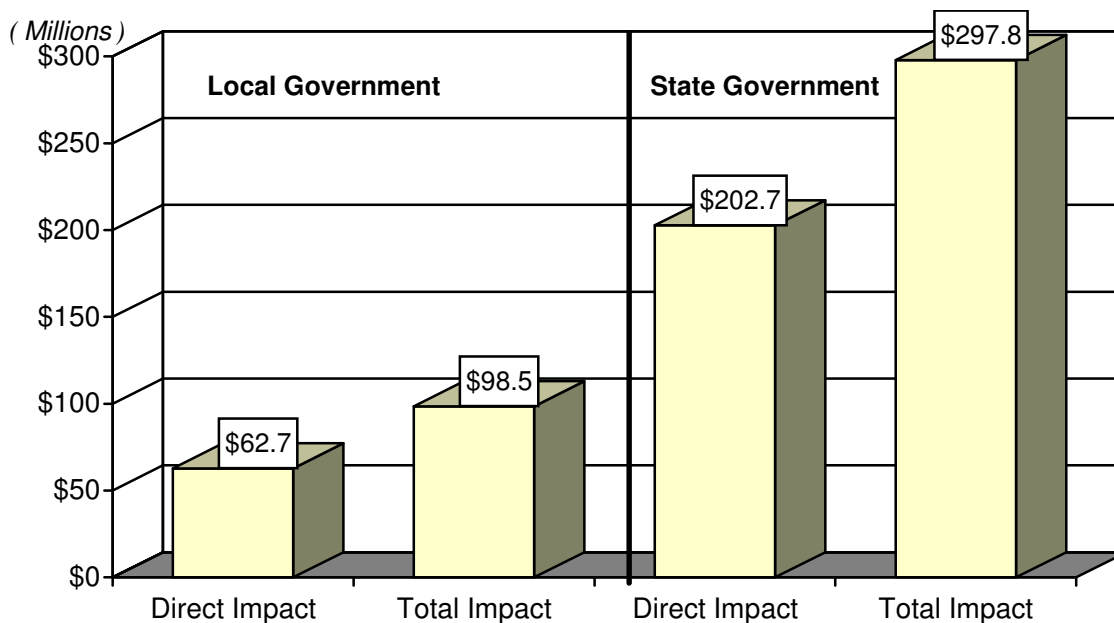
4.5 Impact on State and Local Government Revenues

Traveler expenditures in the Northcentral/West Region led to the receipt of \$297.8 million in state government revenues and \$98.5 million in local government revenues in **total** during the period June 2005 through May 2006.

During the period June 2005 through May 2006, the state government collected \$202.7 million and local governments collected \$62.7 million that were **directly** attributable to traveler expenditures.

Figure 4.5

Impact of Traveler Expenditures on State and Local Government Revenues June 2005 through May 2006



5.0 The Northcentral/West Region Lodging Industry

5.1 Summary

For *hotels/motels/B&Bs*, about two-thirds of the available roomnights were sold at an average rate of \$72. Travelers typically traveled as parties of two and stayed two nights. Half the travelers were on pleasure trips and one-third on business trips with about two-thirds of the rooms booked by Minnesota residents and the remaining third by out-of-state travelers.

While average *resort* unit rates were higher (\$144/night), the party size was likely to be four and they stayed four nights. More than half the resort units offered were rented. Three-quarters of resort guests were Minnesota residents.

Campground sites were rented at an average of \$23 per night with an occupancy rate of 46%. Campers traveled in parties of three on average and stayed an average of three nights. Two out of three campers were Minnesota residents.

5.2 Hotel/Motel/B&B Inventory

During June 2005 through May 2006, 270 properties with 10,510 rooms made 3.78 million roomnights available to the public and sold 2.34 million of those roomnights to travelers staying for fewer than 30 nights.

5.3 Room Rates and Occupancy

The overall average daily room rate at Northcentral/West Region hotels/motels/B&Bs was \$72.12 during June 2005 through May 2006.

Hotels/motels//B&Bs had an average occupancy rate of 62%.

Table 5.3

Room Rates and Occupancy by Season ***(Hotels/Motels/ B&Bs)***

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Average daily room rates*	\$72.12	\$84.45	\$63.60	\$66.89	\$67.41
Average occupancy*	62%	74%	63%	57%	53%
Total available roomnights (in millions)	3.78	0.97	0.94	0.92	0.95
Total occupied roomnights (in millions)	2.34	0.71	0.60	0.52	0.51

*The bases for these statistics are weighted by the number of rooms that are open in each quarter. Yearly averages are weighted by quarter.

Note: Average occupancy is calculated by taking total occupied roomnights as a percentage of total available roomnights, excluding from both figures any rooms rented for 30 nights or more.

5.4 Guest Party Size and Length of Stay

Hotel/motel/B&B property managers reported that their guests typically traveled in parties of two and stayed an average of two nights.

Table 5.4

**Management's Estimate:
Average Guest Party Size and Length of Stay by Season
(Hotels/Motels/B&Bs)**

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Average party size*	2.06	2.18	1.96	2.07	1.94
Average length of stay*	1.90	2.24	1.52	1.82	1.71

*The bases for these statistics are weighted by the number of rooms that are open in each quarter. Yearly averages are weighted by quarter.

5.5 Guest Party Trip Purpose and Guest Origin

Hotel/motel/B&B property managers reported that almost one out of two of their guests were traveling either for business (34%) or to attend meetings and conventions (12%). The remaining guests were traveling for pleasure (54%).

Managers reported that two in three of their guests were Minnesota residents (65%).

Table 5.5

**Management's Estimate:
Trip Purpose and Guest Origin by Season
(Hotels/Motels/B&Bs)**

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Trip Purpose					
Pleasure	54%	62%	54%	45%	55%
Business	34%	32%	26%	37%	35%
Meetings/conventions	12%	6%	20%	18%	10%
Guest Origin					
<u>Out of state</u>	<u>35%</u>	<u>44%</u>	<u>33%</u>	<u>31%</u>	<u>29%</u>
U.S.	28%	37%	22%	24%	22%
Canada	7%	6%	11%	7%	6%
Other foreign	*	1%	--	*	1%
Minnesota	65%	56%	67%	69%	71%

Note: Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%

5.6 Resort Inventory

Some 565 resorts had 6,250 units available to the public. Resorts made 1.43 million unitnights available over the 12-month period and sold 860 million unitnights to guests who stayed fewer than 30 nights.

5.7 Unit Rates and Occupancy

The average unit rate for a resort was \$143.59 during the period June 2005 through May 2006.

Occupancy rates for resorts averaged 60%.

Table 5.7

Unit Rates and Occupancy by Season (Resorts)

	<u>June 2005- May 2006 TOTAL</u>	<u>June- August 2005</u>	<u>September- November 2005</u>	<u>December 2005- February 2006</u>	<u>March- May 2006</u>
Average daily unit rates*	\$143.59	\$137.96	\$137.61	\$153.15	\$162.26
Average occupancy*	60%	81%	47%	40%	48%
Total available unitnights (in millions)	1.43	0.58	0.36	0.19	0.29
Total occupied unitnights (in millions)	0.86	0.47	0.17	0.08	0.14

*The bases for these statistics are weighted by the number of units that are open in each quarter. Yearly averages are weighted by quarter.

Note: Average occupancy is calculated by taking total occupied unitnights as a percentage of total available unitnights, excluding from both figures any units rented for 30 nights or more.

5.8 Guest Party Size and Length of Stay

Property managers of the Northcentral/West Region resorts reported that guests at their locations usually traveled in groups of four and stayed four nights on average.

Table 5.8

**Management's Estimate:
Average Guest Party Size and Length of Stay By Season
(Resorts)**

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Average travel party size	4.18	4.65	2.95	4.69	4.51
Average length of stay	4.28	5.97	3.47	2.08	3.34

5.9 Purpose of Trip and Guest Origin

According to property managers' estimates, virtually all resort guests (98%) were traveling on a pleasure trip.

Managers reported that three guests in four were Minnesota residents (72%), while the remaining guests lived outside the state.

Table 5.9
**Management's Estimate:
 Trip Purpose and Guest Origin by Season
 (Resorts)**

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Purpose of guests' trip:					
Pleasure	98%	99%	100%	96%	97%
Business	2	1	*	4%	3%
Meetings/conventions	1%	*	--	--	--
Guest Origin:					
<u>Out of State</u>	<u>28%</u>	<u>41%</u>	<u>15%</u>	<u>14%</u>	<u>28%</u>
U.S.	28%	40%	15%	14%	27%
Canada	*	*	--	*	1%
Other Foreign	*	*	--	--	*
Minnesota	72%	60%	85%	86%	72%

Note: Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%

5.10 Campground Inventory

The Northcentral/West Region campground providers offered 11,802 sites in 348 campgrounds to the public for use during the period June 2005 – May 2006. That yielded a total of 2.27 million sitenights available, with 1.03 million sitenights sold to guests staying fewer than 30 nights. Campgrounds on both public and private lands are included in the inventory.

5.11 Site Rates and Occupancy

The average rate for a campground site was \$23.38.

The average occupancy rates for the Northcentral/West Region campgrounds was 46%.

Table 5.11
Site Rates and Occupancy by Season
(Campgrounds)

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Average site rate*	\$23.38	\$23.27	\$23.60	N/A	\$23.65
Average occupancy*	46%	69%	31%	1%	31%
Total available sitenights (in millions)	2.27	1.04	0.54	0.21	0.48
Total occupied sitenights (in millions)	1.03	0.72	0.17	**	0.15

*The bases for these statistics are weighted by the number of sites that are open in each quarter. Yearly averages are weighted by quarter.

**Less than 0.01 million (10,000).

N/A: Campgrounds surveyed had sites available for short-term rental but no guests during the December 2005 – February 2006 time period, and therefore, had no figures to report. Projections were made for the balance of the campgrounds based on the averages from all campgrounds surveyed across the state in the winter season.

Note: Average occupancy is calculated by taking total occupied sitenights as a percentage of total available sitenights, excluding from both figures any sites rented for 30 nights or more.

5.12 Guest Party Size and Length of Stay

The Northcentral/West Region campers typically traveled in parties of three and spent an average of three nights while visiting, according to campground managers.

Table 5.12

**Management's Estimate:
Average Guest Party Size and Length of Stay by Season
(Campgrounds)**

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Average travel party size	3.14	3.30	2.40	N/A	2.82
Average length of stay	2.77	2.90	2.43	N/A	2.47

N/A: Campgrounds surveyed had sites available for short-term rental but no guests during the December 2005 – February 2006 time period, and therefore, had no figures to report.

5.13 Guest Origin

The Northcentral/West Region campground managers reported that two in three Northcentral/West Region campers (66%) were Minnesota residents.

Table 5.13
**Management's Estimate:
Guest Origin by Season
 (Campgrounds)**

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Guest Origin:					
<u>Out of State</u>	<u>34%</u>	<u>36%</u>	<u>39%</u>	<u>N/A</u>	<u>20%</u>
U.S.	30%	31%	37%	N/A	18%
Canada	4%	4%	2%	N/A	2%
Other Foreign	*	1%	--	N/A	--
Minnesota	66%	64%	61%	N/A	80%

Note: Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%

N/A: Campgrounds surveyed had sites available for short-term rental during the December 2005 – February 2006 time period but no guests during this time period, and therefore, had no figures to report.

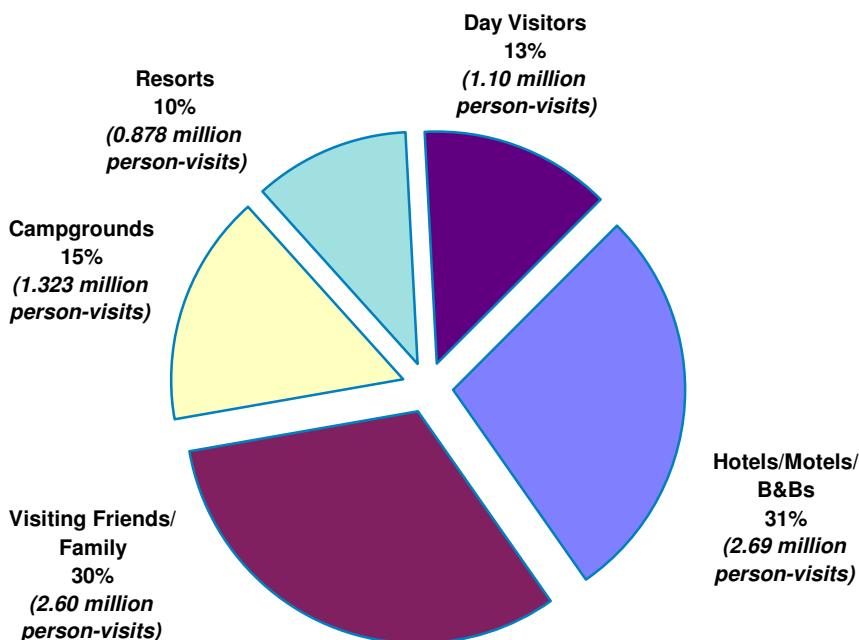
6.0 Travel Volume in the Northcentral/West Region

Person-visits in the Northcentral/West Region totaled 8.598 million during the period June 2005 through May 2006. A total of 7.49 million were overnight person visits – one person staying in one accommodation. In addition, day travelers in the Northcentral/West Region were estimated at 1.10 million.

Hotel/motel/B&B guests represented 31% of person-visits while travelers staying with family and/or friends represented 30%. Campers accounted for 15% of person-visits while travelers staying in resorts made up 10% of the person-visits in the Northcentral/West Region in June 2005 through May 2006.

Figure 6.0

The Northcentral/West Region Person-Visits



TOTAL: 8.598 Million Person-Visits

Note: A **person-visit** is classified in this report as one person on a day trip or one person staying overnight in one accommodation for one or more nights. For example, a couple on a three-night weekend is counted as two person-visits. If a guest to Northcentral/West Minnesota travels to many locations in the region, staying overnight in many different accommodations, each overnight stay is considered a person-visit. Therefore, 8.598 million person-visits should not necessarily be interpreted as 8.598 million travelers.

7.0 The Profile of Travelers in the Northcentral/West Region

This section details the findings concerning the profile of Northcentral/West Region travelers overall and by each season during the period June 2005 – May 2006.

7.1 Demographic and Socioeconomic Profile

- The average age of Northcentral/West Region travelers was 43.2 years. Travelers in the winter season tended to be older than those in the spring season (45.6 and 41.1 years).
- The median household income was \$58,900. Summer season travelers had a higher median income (\$68,100) than fall season travelers (\$45,700).
- Nine travelers in ten identified themselves as white (91%).
- The vast majority of Northcentral/West travelers lived in the United States (97%) and half were residents of Minnesota (48%). Travelers in the Northcentral/West Region resided in 30 different states. Beyond Minnesota, the leading state of residence was North Dakota (23%).

The proportion of in-state travelers was higher in the summer (57%), winter (61%), and spring (45%) seasons than in the fall (29%) season. In contrast, fall season travelers were more likely to be North Dakota residents (44%) than were travelers in other seasons.

Table 7.1

Demographic and Socioeconomic Profile

	June 2005- May 2006 TOTAL	June- August 2005	September- November 2005	December 2005- February 2006	March- May 2006
Base:	481	183	115	75	107
Age:					
18 to 24	11%	8%	11%	9%	19%
25 to 29	9	9	13	7	8
30 to 39	20	23	18	19	19
40 to 49	24	24	25	19	25
50 to 59	22	22	25	24	16
60 to 64	5	5	5	5	6
65 and older	7	6	4	12	7
No Answer	2	3	*	6	*
Average Age	43.2	43.8	42.6	45.6	41.1
Income:					
Less than \$25,000	14%	11%	21%	9%	14%
\$25,000 to \$34,999	13	10	20	15	12
\$35,000 to \$49,999	12	12	12	14	13
\$50,000 to \$74,999	24	20	28	22	27
\$75,000 to \$99,999	13	14	11	16	11
\$100,000 to \$124,999	11	12	5	14	13
\$125,000 to \$149,999	4	6	2	3	3
\$150,000 or more	5	9	1	3	3
No Answer	5	7	1	4	5
Estimated Median Income	\$58,900	\$68,100	\$45,700	\$61,800	\$57,800
Gender:					
Male	54%	56%	53%	56%	49%
Female	44	40	47	43	51
No Answer	2	4	*	2	*
Racial/Ethnic Background:					
American Indian	2%	2	2	3	1
Asian	1	1	*	1	1
Black	2	3	3	*	2
Hispanic	2	3	3	3	*
White	91	90	88	93	94
Other	*	*	*	*	2
No Answer	2	3	4	1	*

* Less than 0.5%

Table 7.1 (continued)

Demographic and Socioeconomic Profile

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Base:	481	183	115	75	107
Residence:					
<u>United States</u>	<u>97%</u>	<u>97%</u>	<u>96%</u>	<u>98%</u>	<u>99%</u>
Minnesota	48	57	29	61	45
Wisconsin	1	3	*	*	2
North Dakota	23	11	44	14	26
Iowa	2	3	1	2	1
South Dakota	2	1	2	4	1
Illinois	1	1	2	*	1
California	*	1	*	*	*
Texas	1	2	1	*	*
Other state	10	13	10	5	7
State not specified	12	8	11	14	18
Canada	1	1	1	1	1
Another Country	*	1	*	*	*
No Answer	1	1	3	1	*

* Less than 0.5%

Note: States with responses less than 2% among the total sample have been aggregated into the "Other state" category.

7.2 Travel Party and Trip Profile

Travel Party

- Three travelers in four were on a vacation or short pleasure trip (76%), while one in five was traveling for personal reasons, e.g., wedding, funeral, medical, etc. (19%).

Travelers in the winter season were less likely to be traveling for a vacation or short pleasure trip (58%) than were travelers in summer (80%), fall (80%), and spring (77%). However, winter travelers were more likely to be traveling for business or work (20%).

- The average travel party size was 2.9 people. Travelers in the summer season were more likely to have larger travel parties (3.2 people) than travelers in the fall and winter seasons (2.7 people each).
- The average number of nights travelers intended to stay overnight was 3.2 nights. The length of stay was longest in the summer (4.1 nights) and shortest in the winter (1.9 nights).
- Two-thirds of Northcentral/West travelers had no children younger than 18 in their travel party (68%). Fall (75%) and winter (74%) season travelers were more likely to be traveling without children than were summer (65%) and spring travelers (61%).
- The vast majority of Northcentral/West travelers had taken a trip in Minnesota in the last five years (93%), with an estimated median of 6.7 trips among these travelers. Trip frequency was highest among winter and summer travelers (estimated median trips of 8.4 and 7.2 respectively) and lowest among fall travelers (estimated median trips of 4.8).

Trip Profile

- Nearly two-thirds (64%) of travelers in the Northcentral/West Region stayed in *paid* accommodations on their trip, primarily hotels/motels/historic inns (42%). One traveler in five stayed in *unpaid* accommodations (22%).

When compared with travelers in other seasons, winter travelers were more likely to stay in a hotel/motel/historic inn (68%) and less likely to stay in any unpaid accommodation (10%). In contrast, summer season travelers were less likely than travelers in other seasons to stay in a hotel/motel/historic inn (28%) but more likely to stay at a resort (12%).

Only a minority of travelers said they were taking a day trip (14%) and did not stay in any type of overnight accommodations on their trip.

- Travelers participated in numerous activities during their trip. Dining out (58%), shopping (55%), visiting friends or relatives (39%), and sightseeing or driving for pleasure (32%) were among the most frequently mentioned trip activities.

General Activities

Dining out was a key activity for travelers in all seasons but more prevalent among winter travelers (70%) than among summer (52%) and spring (57%) travelers. Sightseeing or driving for pleasure (17%) and casino gaming (3%) were less common activities among winter travelers than among travelers in other seasons. Fall travelers were more likely to participate in casino gaming (44%) and viewing fall colors (20%). A higher proportion of fall (29%) and spring (23%) travelers participated in nightlife or evening entertainment as compared with summer (11%) and winter (12%) travelers.

Visiting People or Places

Two-thirds of Northcentral/West travelers were visiting people or places during their trip (65%). Two travelers in five indicated they were visiting friends or relatives (39%) while one in four said they were visiting state or national parks (28%). Fall travelers were more likely to visit friends and relatives (50%) than were those in other seasons. Spring travelers most frequently mentioned visiting state or national parks (53%).

Active Recreation

Two-thirds of Northcentral/West travelers participated in “active” recreation (65%). The array of activities was diverse, with fishing (24%) and lake/river swimming (22%) topping the list.

Partaking in active recreation was most prevalent among summer travelers (77%). The most frequently cited activities included: fishing (43%), lake/river swimming (37%), motor boating/water skiing (25%), hiking (21%), golfing (19%), biking (17%), and wildlife viewing/bird watching (15%).

The top activities among travelers in other seasons were:

- Fall – pool swimming (23%)
- Winter – downhill skiing/snowboarding (24%)
- Spring – hiking (23%) and lake/river swimming (20%)

Shopping

Just over half of Northcentral/West Region travelers did some type of shopping on their trip (55%), mostly for gifts and souvenirs (33%).

Fall season travelers more frequently mentioned shopping for gifts and souvenirs (46%) and shopping at The Mall of America (15%) than did summer, winter, or

spring travelers. Winter travelers (25%) were more likely than summer (9%) or spring (13%) travelers to shop for arts, crafts, or antiques.

Attending Events

Less than one-third of travelers (29%) indicated they had attended an “event” while on their trip in the Northcentral/West Region. The incidence of attending an event was higher among spring and fall travelers (44% and 33% respectively) than among summer and winter travelers (23% and 18% respectively).

A higher proportion of spring travelers attended amateur sporting events (25%) and theater performances (8%) than did travelers in any other season. Attending popular music concerts or shows was more prevalent among fall and spring travelers (11% and 10%). Fairs and festivals were less popular among winter travelers (1%) when compared with travelers in the warmer seasons.

Table 7.2

Travel Party and Trip Profile

	June 2005- May 2006 TOTAL	June- August 2005	September- November 2005	December 2005- February 2006	March- May 2006
Base:	481	183	115	75	107
Trip Purpose (multi-response):					
Vacation or short pleasure trip	76%	80%	80%	58%	77%
Personal (e.g., wedding, funeral, medical, etc.)	19	18	16	26	18
Convention or conference	2	1	4	4	1
Business or work	7	3	5	20	7
No Answer	1	2	*	*	*
Travel Party Size:					
1 person	11%	10%	8%	18%	12%
2 people	36	31	46	38	34
3 to 4 people	35	33	40	31	37
5 or more people	17	26	6	14	18
Average Travel Party Size	2.9	3.2	2.7	2.7	3.0
Total Trip Length of Stay:					
Daytripper	14%	15%	15%	16%	10%
1 night	17	9	10	33	26
2 nights	27	25	27	38	20
3 to 6 nights	34	31	47	12	38
7 or more nights	9	20	1	1	6
Average Nights (Excluding Daytrippers)	3.2	4.1	2.9	1.9	2.8
Children in Travel Party					
One or more children under 18 years old	32%	35%	25%	26%	39%
No children	68	65	75	74	61
Ages of Children in Travel Party					
<i>Younger than 6 years old</i>					
None	87%	85%	92%	90%	83%
One or more	13	15	8	10	17
<i>6 to 11 years old</i>					
None	85%	79%	92%	90%	85%
One or more	15	21	8	10	15
<i>12 to 17 years old</i>					
None	83%	82%	87%	84%	80%
One or more	17	18	13	16	20

* Less than 0.5%

Table 7.2 (continued)

Travel Party and Trip Profile

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Base:	481	183	115	75	107
Minnesota Trips in Last 5 Years					
None	5%	9%	1%	3%	5%
1 trip	7	7	7	5	11
2 to 4 trips	28	21	45	22	26
5 to 10 trips	26	27	27	26	23
More than 10 trips	32	34	20	43	35
No Answer	1	2	*	1	1
Estimated Median Trips	6.8	7.2	4.8	8.4	6.8
Lodging:					
<u>Paid Accommodations</u>	<u>64%</u>	<u>61%</u>	<u>58%</u>	<u>74%</u>	<u>68%</u>
Hotel/Motel/Historic Inn	42	28	48	68	41
In a tent at a campground	7	7	6	*	12
Resort	6	12	3	2	2
In an RV at a campground	6	11	*	*	8
Vacation home/condo/cabin/houseboat you rented	2	3	*	1	3
Bed & Breakfast	1	1	1	3	2
<u>Unpaid Accommodations</u>	<u>22%</u>	<u>24%</u>	<u>27%</u>	<u>10%</u>	<u>23%</u>
Home of family or friends	15	15	22	9	13
Vacation home/condo/cabin/houseboat of family or friend	4	4	6	*	7
At your vacation home/condo/cabin/ Houseboat	1	3	*	1	*
At a campground with no fee	1	2	*	*	3
<u>Day tripper</u>	<u>14%</u>	<u>15%</u>	<u>15%</u>	<u>16%</u>	<u>10%</u>

* Less than 0.5%

Table 7.2 (continued)

Travel Party and Trip Profile

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Base:	481	183	115	75	107
Activities:					
<u>General (checked one or more below)</u>	<u>80%</u>	<u>73%</u>	<u>94%</u>	<u>80%</u>	<u>78%</u>
Dining out	58	52	62	70	57
Sightseeing or driving for pleasure	32	34	34	17	35
Casino gaming	20	18	44	3	12
Nightlife or evening entertainment	18	11	29	12	23
Driving on designated scenic byways	14	14	14	10	16
Taking in city sites	12	12	9	9	17
Viewing fall colors	7	6	20	*	*
<u>Visiting (checked one or more below)</u>	<u>65%</u>	<u>67%</u>	<u>70%</u>	<u>50%</u>	<u>70%</u>
Friends or relatives	39	33	50	36	39
State or national parks	28	26	23	4	53
Historic sites	13	15	11	10	15
Other museums	9	8	8	14	8
Amusement parks or carnivals	8	10	13	*	4
Art museums	6	3	11	9	6
Outdoor water parks	3	3	9	*	*
Indian areas	4	3	4	3	6
Indoor water parks	2	1	3	2	2
Other attraction	1	2	*	1	*
<u>Participating In (checked one or more below)</u>	<u>65%</u>	<u>77%</u>	<u>59%</u>	<u>50%</u>	<u>61%</u>
Fishing	24	43	15	*	17
Lake/river swimming	22	37	12	*	20
Hiking	17	21	14	2	23
Pool swimming	16	11	23	18	18
Motor boating/water skiing	13	25	7	*	7
Biking	12	17	6	*	18
Wildlife viewing or bird watching	11	15	10	8	11
Golfing	11	19	8	*	9
Canoeing	8	9	6	*	15
Jet skiing	8	12	8	*	6
Downhill skiing or snowboarding	4	*	*	24	1
Off-road ATV driving	4	6	3	*	2
Hunting	2	4	1	1	*
Ice Fishing	1	*	*	7	1
Snowmobiling	1	*	*	6	1
Cross-country skiing	1	*	*	6	2
Other activity	2	3	1	*	1

* Less than 0.5%

Table 7.2 (continued)

Travel Party and Trip Profile

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Base:	481	183	115	75	107
<u>Shopping (checked one or more below)</u>	<u>55%</u>	<u>47%</u>	<u>69%</u>	<u>52%</u>	<u>55%</u>
For gifts or souvenirs	33	32	46	27	27
General or mall shopping	19	15	20	21	23
Arts, crafts, or antiques	14	9	17	25	13
Outlet shopping	11	8	17	10	8
At the Mall of America	7	7	15	1	5
<u>Attending (checked one or more below)</u>	<u>29%</u>	<u>23%</u>	<u>33%</u>	<u>18%</u>	<u>44%</u>
Amateur sporting events	11	6	7	10	25
Fairs or festivals	9	10	13	1	9
Popular music concerts or shows	6	2	11	2	10
Professional sporting events	4	8	3	*	2
Theater performances	3	1	2	2	8
Classical music concerts	2	*	2	2	4
Other events	1	*	3	2	1
No Answer	*	1	*	1	*

*Less than 0.5%

Appendix A: Procedures

Technical Appendix: The Research Procedures

Introduction

The basic procedure employed in this project is the T-MAP-I economic impact model. *Davidson-Peterson Associates* first employed this procedure in 1985 for the State of Georgia. Since then, it has been used to estimate traveler expenditures in states and local areas throughout the United States.

A. What is Economic Impact?

Economic impact begins when a traveler to an area spends any amount of money on any product or service in that area. The **direct** recipients of traveler expenditures use these dollars to earn income, pay wages, and pay taxes, thus, creating a **direct impact** on the local economy. But, the benefits to the local economy extend beyond the direct impact of these dollars. Traveler expenditures create a chain effect. When businesses and their employees spend *their* income in the state, they create an **indirect impact** by supporting additional jobs, wages, salaries, proprietary income and tax revenues. The sum of the **direct** and **indirect impact** equals the total economic impact of traveler expenditures.

B. What is a Traveler?

For purposes of this study, a traveler is anyone who stays overnight one to 29 nights or who is on a day trip in an area that is at least 50 miles from their primary residence. Travelers may be motivated to travel by pleasure, personal, or business reasons or some combination of reasons. If they remain in the area for more than 30 days, they cease being a traveler. If they are staying in accommodations contracted for more than a 30-day period (construction workers or truck drivers, for example), they are not classified as travelers and the rooms they occupy are not included in those occupied by travelers.

This report and the T-MAP-I procedure are based on the premise that economic impact begins with the expenditure of dollars by travelers (bottom-up measurement) rather than receipts of selected businesses (top-down measurement) – a more traditional tool of economic analysis.

Davidson-Peterson Associates does **not** use the traditional top-down or industry receipts-based. In this study:

- Sales tax data or industry receipts are not employed;
- Measurements begin with **every dollar** travelers spend;
- North American Industry Classification System (NAICS) codes are **not** used; and
- **Travelers** define where they spend money.

C. Additional Explanations

- Top-down or industry receipts-based measures assume that an industry is composed of a set of businesses that are clearly designated by customary NAICS codes. For most industries this works well. However, when applied to tourism, this method tends to underestimate the economic impact, in part because businesses are not able to separate traveler expenditures from resident expenditures.
- Tourism is not a typical industry, and cannot be represented in its entirety by a few NAICS-classified businesses. Tourism is the movement of people into an area for a brief period of time. Its economic impact begins with the sum of every dollar travelers spend on lodging, retail purchases, gas, food, entertainment or any other goods or services people buy.
- When travelers spend dollars, they spend them in many of the same “traditional industries” as local residents. While these businesses (such as retail stores, restaurants and gas stations) are identified by NAICS codes, there is simply no way to separate the purchases of travelers from those of local residents. The bottom-up procedure employed by *Davidson-Peterson Associates* is based on all traveler expenditures in all industries.

This procedure for assessing economic impact provides accurate estimates of current numbers as well as measurements of change from year to year. Methods and numbers are constantly being reviewed to generate the most accurate measures of change possible.

D. The Basic Research Steps for the Northcentral/West Region Effort

What follows is a brief description of the procedures for estimating economic impact as they were completed in June 2005 through May 2006.

1. Inventory Update

Early in the study design, Davidson-Peterson Associates received a copy of the inventory of lodging properties maintained by Explore Minnesota Tourism.

2. Sampling

For each quarter, open properties in each of three categories (hotels/motels/B&Bs, resorts, and campgrounds) were arrayed by size and cumulative totals calculated. A random number was used to select the first property and a skip pattern developed to identify 400 properties for interviewing chosen with size taken into account. Since the quarters were sampled independently some large properties were selected more than once but all open properties had a chance of being selected each quarter.

3. Seasonal Surveys of Paid Lodging Business Activity

Every property included in the regional survey sample was contacted and asked to complete a survey questionnaire by phone. Those who did not participate by phone were asked to complete the survey via mail or fax. Additional properties in counties participating in special economic impact studies are added to the state sample. A total of 543 quarterly surveys were conducted:

<u>Seasonal</u>	<u># Interviewed</u>
June – August	184
September – November	104
December – February	128
March – May	127

4. Resident– (VFR) Survey

To determine the incidence of visiting friends and relatives (VFR) in the state, telephone interviews were conducted with a random sample of Minnesota households. Data from these surveys was projected to the total state household population.

A total of 1,001 VFR surveys were completed in during the June 2005 through May 2006 period. The proportion of visitor days per household was applied to the total households in the Northcentral/West Region.

5. Traveler Expenditure Survey/Modeling

To represent the proportion of traveler expenditures spent on specific types of goods and services, travelers were surveyed on-site while in Minnesota. The traveler expenditure ratios obtained from the on-site interviews were applied to derive the total expenditures by category.

A total of 2,292 Traveler Expenditure surveys were completed during the period June 2005 through May 2006 at a variety of sites across Minnesota. Sites were chosen by selecting a county and zip code for each region based on the array of properties by size. Essentially the counties where a sizable volume of overnight accommodations exist to serve travelers had a greater chance to be selected. Within the selected zip codes, an array of sites were chosen to maximize the ability to find a variety of tourists on site.

Roughly equal proportions of interviews were completed in each of the four Explore Minnesota Tourism regions. Of the 2,292 questionnaires, a small number were excluded from the economic impact sample due to their failure to complete all five questions necessary to include their responses in the model. The combined total of 2,274 was used to calculate the expenditure ratios for the state and for each of the four regions. However, the 594 surveys conducted in the Northcentral/West Region were the basis for the traveler profile study in this region.

6. Economic Impact Data Calculations

Room, unit and campsite rates and occupancy were used to estimate the total expenditures at each type of accommodation. The traveler expenditure ratios were applied to this figure to derive the total traveler expenditures by those staying in each type of accommodation, in each region, and in each season.

7. Input/Output (I/O) Modeling

A special inter-industry model constructed for Minnesota utilizes the total tourism expenditures to determine estimates of employment, income, and government revenue impacts of expenditures on the state both direct and total. Models were also developed for each of the four tourism regions. Please note that the regional impacts will not add to the state totals. Revenue leaked from one region to another is excluded from the region totals but included in the state total.

E. Additional Procedures for the Northcentral/West Region Traveler Profile Study

To reflect seasonal and regional visitation patterns more accurately, Davidson-Peterson Associates balanced the sample of travelers from the Traveler Expenditure Survey according to the person-visit estimates from the economic impact portion of the research study. With this modest weighting, the annual traveler profile study results are based on a sample of travelers in Minnesota which is balanced so as to be directly proportional to the estimated number of travelers by region and season.

The table on the following page shows the distribution across season and region for the following:

- The estimated proportion of person-visits in each season by region;
- The number of interviews completed in each season by region;
- The weights applied to the interviews to balance the sample to the desired number of interviews in each season by region; and
- The number of interviews in the balanced sample so that the proportion matches the person-visits proportion in each season by region.

**Sample Balancing by
Estimated Proportion of Person-Visits**

	Proportion of Person- Visits	Actual Completes	Weights Applied	Balanced Completes
<u>Summer 2005</u>	<u>38.0%</u>	<u>869</u>		<u>872</u>
Metro	16.3%	248	1.508	374
Northcentral/West	8.0%	233	0.786	183
Southern	7.6%	199	0.878	175
Northeast	6.1%	189	0.742	140
<u>Fall 2005</u>	<u>23.6%</u>	<u>449</u>		<u>541</u>
Metro	10.6%	113	2.158	244
Northcentral/West	5.0%	102	1.130	115
Southern	4.2%	121	0.798	97
Northeast	3.8%	113	0.759	86
<u>Winter 2005-2006</u>	<u>16.3%</u>	<u>472</u>		<u>374</u>
Metro	7.9%	137	1.324	181
Northcentral/West	3.3%	117	0.643	75
Southern	3.0%	111	0.613	68
Northeast	2.1%	107	0.456	49
<u>Spring 2006</u>	<u>22.0%</u>	<u>502</u>		<u>505</u>
Metro	9.9%	136	1.674	228
Northcentral/West	4.7%	142	0.755	107
Southern	3.8%	109	0.811	88
Northeast	3.6%	115	0.710	82
<u>Total</u>	<u>100.0%</u>	<u>2,292</u>		<u>2,292</u>
Metro	44.8%	634		1027
Northcentral/West	21.0%	594		481
Southern	18.7%	540		428
Northeast	15.5%	524		356

A sample of 594 is considered accurate to plus or minus 4.0 percentage points at the 95% confidence level. The following tables show the confidence levels at 95% for each season:

Confidence Intervals by Season

Season	Actual Sample Size	Confidence Intervals
Summer 2005	233	± 6.4
Fall 2005	102	± 9.7
Winter 2005-2006	117	± 9.1
Spring 2006	142	± 8.2
Total	594	± 4.0

Appendix B: Supporting Tables

Table B-1

**Estimated Traveler Expenditures
By Category of Expenditure and
Accommodation Used
June 2005 through May 2006
(\$ Millions)**

***** Paid Accommodations ***** * No Lodging Expense *

	Hotels/ Motels/ B&Bs	Resorts	Camp- grounds	Visiting Friends/ Relatives	Day Tripper	Total
Food	\$150.92	\$167.90	\$53.08	\$236.94	\$16.20	\$625.03
<u>Shopping</u>	<u>\$169.27</u>	<u>\$93.39</u>	<u>\$85.56</u>	<u>\$209.42</u>	<u>\$16.25</u>	<u>\$573.89</u>
General	100.66	50.44	53.28	151.25	7.15	362.78
Traveler	68.61	42.95	32.28	58.17	9.10	211.11
<u>Recreation</u>	<u>\$158.49</u>	<u>\$124.38</u>	<u>\$86.24</u>	<u>\$208.71</u>	<u>\$23.67</u>	<u>\$601.48</u>
Liquor	30.77	43.98	18.02	68.71	1.82	163.29
Historic	5.78	3.26	8.20	7.40	0.83	25.46
Sightseeing	11.21	1.94	5.24	3.04	0.87	22.30
Event fees	24.13	3.20	16.48	17.58	3.52	64.90
Sport fees	19.92	23.39	8.82	29.71	4.40	86.24
Cultural event fees	3.57	0.00	0.33	12.16	0.47	16.52
Evening entertainment	15.35	6.75	11.89	30.89	0.80	65.68
Licenses	6.21	29.97	9.41	18.75	0.49	64.83
Sweepstakes	2.57	4.86	0.92	3.58	0.70	12.63
Wagering	38.55	6.92	6.15	15.28	9.74	76.65
Other	0.43	0.11	0.80	1.62	0.03	2.98
Lodging	\$166.98	\$123.53	\$23.55	--	--	\$314.06
Ground Transportation	\$68.25	\$62.68	\$47.43	\$110.55	\$6.54	\$295.45
Total	\$713.90	\$571.88	\$295.86	\$765.61	\$62.66	\$2,409.91

Note: Columns of figures may not add to totals shown due to rounding.

Table B-2

**Estimated Traveler Expenditures
By Season
June 2005 through May 2006
(\$ Millions)**

	<u>June-August 2005</u>	<u>September- November 2005</u>	<u>December 2005-February 2006</u>	<u>March-May 2006</u>	<u>Total</u>
Food	\$285.53	\$127.21	\$79.67	\$132.62	\$625.03
<u>Shopping</u>	<u>\$264.02</u>	<u>\$117.53</u>	<u>\$74.02</u>	<u>\$118.32</u>	<u>\$573.89</u>
General	165.89	74.36	46.56	75.97	362.78
Traveler	98.12	43.17	27.46	42.36	211.11
<u>Recreation</u>	<u>280.03</u>	<u>121.81</u>	<u>74.67</u>	<u>124.98</u>	<u>\$601.48</u>
Liquor	76.11	32.84	19.51	34.83	163.29
Historic	12.93	4.94	2.53	5.06	25.46
Sightseeing	10.36	4.59	3.06	4.28	22.30
Event fees	30.73	13.16	8.07	12.94	64.90
Sport fees	39.99	17.56	10.91	17.77	86.24
Cultural event fees	6.77	3.41	2.20	4.14	16.52
Evening entertainment	30.52	13.37	8.01	13.78	65.68
Licenses	32.55	12.41	6.34	13.53	64.83
Sweepstakes	5.94	2.53	1.54	2.62	12.63
Wagering	32.68	16.39	12.14	15.44	76.65
Other	1.45	0.61	0.34	0.58	2.98
Lodging	\$141.83	\$65.07	\$46.69	\$60.47	\$314.06
Transportation	\$139.39	\$59.18	\$34.82	\$62.05	\$295.45
Total	\$1,110.80	\$490.79	\$309.87	\$498.44	\$2,409.91

Note: Columns of figures may not add to totals shown due to rounding.

Seasonal Analysis

	<u>June- August 2005</u>	<u>September- November 2005</u>	<u>December 2005 – February 2006</u>	<u>March – May 2006</u>
Share of seasonal expenditures	46%	20%	13%	21%
Share of days in year	25%	25%	25%	25%
Ratio	1.83	0.82	0.52	0.82

Table B-3

**Estimated Impact of Traveler Expenditures
on the Economy of The Northcentral/West Region
June 2005 through May 2006**

	<u>Direct Impact</u>	<u>Total Impact</u>
Employment (full-time job equivalents)	41,400	59,300
Resident Income (wages, salaries, and proprietary income)	\$657,300,000	\$1,100,100,000
Government Revenues:		
State government revenues	\$202,700,000	\$297,800,000
Local government revenues	\$62,700,000	\$98,500,000

STATISTICAL DIFFERENCES

The Profile of Northcentral/West Region Travelers

When appropriate, significant differences at the 95% confidence level are noted in the findings. Tests of significance are statistical methods for measuring the likelihood that observed relationships in a sample are the result of real differences between the groups and not sampling error. Thus, when we state that two numbers are statistically different at the 95% confidence level, we are saying that if we were to sample the universe 100 times, at least 95 times out of 100 the samples observed would be different. In contrast, fewer than five times out of 100 there would not be any difference between the observed numbers.

The following is an example of how these tables can be interpreted and used. The proportion of respondents residing in Minnesota during the summer (57%), winter (61%), and spring (45%) seasons was significantly higher than the proportion of respondents residing in Minnesota during the fall (29%).

Table B-4

Demographic and Socioeconomic Profile
Statistical Differences by Season

	June 2005– May 2006 TOTAL	June- August 2005	September- November 2005	December 2005- February 2006	March-May 2006
Base:	481	183	115	75	107
		a	b	c	d
Age:					
18 to 24	11%	8%	11%	9%	19%ac
65 and older	7	6	4	12b	7
Average Age	43.2	43.8	42.6	45.6d	41.1
Income:					
Less than \$25,000	14%	11%	21%ac	9%	14%
\$25,000 to \$34,999	13	10	20a	15	12
\$100,000 to \$124,999	11	12b	5	14b	13b
\$150,000 or more	5	9bcd	1	3	3
Refused/NA	5	7b	1	4	5
Estimated Median Income	\$58,900	\$68,100b	\$45,700	\$61,800	\$57,800
Gender:					
Female	44	40	47	43	51a
Residence:					
Minnesota	48	57bd	29	61bd	45b
North Dakota	23	11	44acd	14	26ac
Other State	10	13cd	10	5	7

* States with responses less than 2% among the total sample have been aggregated into the "Other state" category.

Note: Shaded percents/numbers are significantly different at the 95% confidence level than the percents/numbers in columns indicated by shaded letters.

Table B-5

Travel Party and Trip Profile
Statistical Differences by Season

	June 2005– May 2006 TOTAL	June- August 2005	September- November 2005	December 2005- February 2006	March-May 2006
Base:	481	183 a	115 b	75 c	107 d
Trip Purpose (multi-response):					
Vacation or short pleasure trip	76%	80% ^c	80% ^c	58%	77% ^c
Business or work	7	3	5	20 ^{abd}	7
Travel Party Size:					
1 person	11%	10%	8%	18% ^{ab}	12%
2 people	36	31	46 ^a	38	34
5 or more people	17%	26 ^{bcd}	6	14 ^b	18 ^b
Average (mean)	2.9	3.2^{bc}	2.7	2.7	3.0
Total Trip Length of Stay:					
1 night	17	9	10	33 ^{ab}	26 ^{ab}
2 nights	27	25	27	38 ^{ad}	20
3 to 6 nights	34	31 ^c	47 ^{ac}	12	38 ^c
7 or more nights	9	20 ^{bcd}	1	1	6 ^{bc}
Average Nights (Excluding Daytrippers)	3.2	4.1^{bcd}	2.9^c	1.9	2.8^c
Children in Travel Party					
One or more children under 18 years old	32%	35% ^b	25%	26%	39% ^{bc}
No children	68	65	75 ^{ad}	74 ^d	61
Ages of Children in Travel Party					
<i>Younger than 6 years old</i>					
None	87%	85%	92% ^d	90%	83%
One or more	13	15	8	10	17 ^b
<i>6-11 Years Old</i>					
None	85%	79%	92% ^a	90% ^a	85%
One or more	15	21 ^{bc}	8	10	15

Note: Shaded percents/numbers are significantly different at the 95% confidence level than the percents/numbers in columns indicated by shaded letters.

Table B-5 (continued)

Travel Party and Trip Profile
Statistical Differences by Season

	June 2005– May 2006 <u>TOTAL</u>	June- August 2005 <u>2005</u>	September- November 2005 <u>2005</u>	December 2005- February 2006 <u>2006</u>	March-May 2006 <u>2006</u>
Base:	481	183	115	75	107
		a	b	c	d
Minnesota Trips in Last 5 Years					
None	5%	9%bc	1%	3%	5%
2 to 4 trips	28	21	45acd	22	26
More than 10 trips	32	34b	20	43b	35b
Estimated Median Trips	6.7	7.2b	4.8	8.4b	6.8
Lodging:					
<u>Paid Accommodations</u>	64%	61%	58%	74%ab	68%
Hotel/Motel/Historic Inn	42	28	48a	68abd	41a
At a resort (cabin/other indoor unit)	6	12bcd	3	2	2
<u>Unpaid Accommodations</u>	22%	24%c	27%c	10%	23%c
Home of family or friends	15	15	22c	9	13
Activities:					
<u>General (checked one or more below)</u>	80%	73%	94%acd	80%	78%
Dining out	58	52	62	70ad	57
Sightseeing or driving for pleasure	32	34c	34c	17	35c
Casino gaming	20	18c	44acd	3	12c
Nightlife or evening entertainment	18	11	29ac	12	23ac
Viewing fall colors	9	6	20a	*	*
<u>Visiting (checked one or more below)</u>	65%	67%c	70%c	50%	70%c
Friends or relatives	39	33	50ac	36	39
State or national parks	28	26c	23c	4	53abc
Amusement parks or carnivals	8	10d	13d	*	4
Art museums	6	3	11a	9a	6

*Less than 0.5%.

Note: Shaded percents/numbers are significantly different at the 95% confidence level than the percents/numbers in columns indicated by shaded letters.

Table B-5 (continued)
**Travel Party and Trip Profile
 Statistical Differences by Season**

	June 2005– May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March-May <u>2006</u>
Base:	481	183	115	75	107
		a	b	c	d
<u>Participating In (checked one or more below)</u>	65%	77%bcd	59%	50%	61%
Fishing	24	43bd	15	*	17
Lake/river swimming	22	37bd	12	*	20
Hiking	17	21c	14c	2	23c
Pool swimming	16	11	23a	18	18
Motor boating/water skiing	13	25bd	7	*	7
Biking	12	17b	6	*	18b
Wildlife viewing/bird watching	11	15c	10	8	11
Golfing	11	19bd	8	*	9
Canoeing	8	9	6	*	15b
Downhill skiing or snowboarding	4	*	*	24d	1
Off-road ATV driving	4	6d	3	*	2
Hunting	2	4c	1	1	*
Ice Fishing	1	*	*	7d	1
<u>Shopping (checked one or more below)</u>	55%	47%	69%acd	52%	55%
For gifts or souvenirs	33	32	46acd	27	27
Arts, crafts, or antiques	14	9	17	25ad	13
Outlet shopping	11	8	17a	10	8
At the Mall of America	7	7c	15acd	1	5c
<u>Attending (checked one or more below)</u>	29%	23%	33%c	18%	44%ac
Amateur sporting events	11	6	7	10	25abc
Fairs or festivals	9	10c	13c	1	9c
Popular music concerts or shows	6	2	11ac	2	10ac
Professional Sporting Events	4	8bd	3	*	2
Theater performances	3	1	2	2	8abc

*Less than 0.5%.

Note: Shaded percents/numbers are significantly different at the 95% confidence level than the percents/numbers in columns indicated by shaded letters.

Appendix C: Minnesota Tourism Regions

MINNESOTA TOURISM REGIONS



COUNTIES WITHIN MINNESOTA'S TOURISM REGIONS

<u>Twin Cities Metro</u>	<u>Northeast</u>	<u>Northcentral/West</u>	<u>Southern</u>
Anoka	Aitkin	Becker	Big Stone
Carver	Carlton	Beltrami	Blue Earth
Chisago	Cook	Benton	Brown
Dakota	Isanti	Cass	Chippewa
Hennepin	Itasca	Clay	Cottonwood
Ramsey	Kanabec	Clearwater	Dodge
Scott	Koochiching	Crow Wing	Faribault
Washington	Lake	Douglas	Fillmore
Wright	Pine	Grant	Freeborn
	St. Louis	Hubbard	Goodhue
		Kittson	Houston
		Lake of Woods	Jackson
		Mahnomen	Kandiyohi
		Marshall	Lac qui Parle
		Mille Lacs	Le Sueur
		Morrison	Lincoln
		Norman	Lyon
		Otter Tail	McLeod
		Pennington	Martin
		Polk	Meeker
		Pope	Mower
		Red Lake	Murray
		Roseau	Nicollet
		Sherburne	Nobles
		Stearns	Olmsted
		Stevens	Pipestone
		Todd	Redwood
		Wadena	Renville
		Wilkin	Rice
			Rock
			Sibley
			Steele
			Swift
			Traverse
			Wabasha
			Waseca
			Watonwan
			Winona
			Yellow Medicine

Appendix D: Survey Instruments

Minnesota 2005/2006 Lodging Managers Survey – Quarter 3

Date: _____ Date: _____ Date: _____ Date: _____ Date: _____ Date: _____
 Time: _____ Time: _____ Time: _____ Time: _____ Time: _____ Time: _____
 Status: _____ Status: _____ Status: _____ Status: _____ Status: _____ Status: _____
 Intvr: _____ Intvr: _____ Intvr: _____ Intvr: _____ Intvr: _____ Intvr: _____

Interviewer: Verify basic information with the person who answers the phone.

Phone Number: «phone» Alternate: «altphone» Contact Name: «manager» Title: «title» Property Name: «name» Fax Number: «fax» Physical Address: «add1» «add2» «city», MN «zip» Mailing Address: «madd1» «madd2» «mcity», «mstate» «mzip» Rooms: «size» («ptype»)	All information correct <input type="checkbox"/>
--	--

Interviewer: Ask to speak with «manager». If not available after multiple attempts, interview an alternate executive and record name/title below.

Contact Name: _____ Title: _____

1. Is your property open only to members of special groups (club members, boy/girl scouts, church groups, etc.)? Yes -- Terminate No -- Continue
2. Is your property available only for permanent or semi-permanent rentals (bookings of more than thirty days at a time)? Yes -- Terminate No -- Continue
3. Is your property open all year? Yes -- Go to Q4 No -- Go to Q3A

3A. *If No* – When does your property open for the season? _____ «season_open»

When does your property close for the season? _____ «season_close»

For each month open -- How many nights is your property open for that month?

Jan	«jan»		Feb	«feb»		Mar	«mar»		Apr	«apr»		May	«may»		Jun	«jun»	
Jul	«jul»		Aug	«aug»		Sep	«sep»		Oct	«oct»		Nov	«nov»		Dec	«dec»	

No nights for **June through August** -- Terminate for this quarter.

4. For the purpose of this study, please think of long term rentals as 30 nights or more. Of the rooms you have for rent, were any committed to long-term rentals, or were any otherwise not available for rental for the period **June 1, 2005 to August 31, 2005**?

Yes -- Go to Q4A No -- Go to Q5

4A. *If Yes* -- As I read each month, please tell me how many of your total rooms were available to transient guests staying for less than 30 nights.

Jun		Jul		Aug	
------------	--	------------	--	------------	--

5. What was your **average percent occupancy rate** for each of the following months?

Jun	%
Jul	%
Aug	%

(If not able to provide occupancy by month

OR

Seasonal Average	%
-------------------------	---

Don't know/ unavailable -- Go to Q6

						Status: «status»
DBNO: «dbno»	Type: «type»	County: «county»	Q1: «qr1»	Q2: «qr2»	Q3: «qr3»	Q4: «qr4»

Minnesota 2005/2006 Lodging Managers Survey – Quarter 3

6. What was your **average daily unit rate** for each of the following months?

Interviewer: If the lodging manager is unable to provide the average daily rates please use the space provided in the column "other details" to record specific unit rate information for each month. (For example, number of rooms at each of several different rates, weekend vs. weekday rates, etc.)

	ADR	Other Details
Jun	\$	
Jul	\$	
Aug	\$	

Only use if the manager is not able to provide ADR by month.

Seasonal ADR	
--------------	--

Office Use Only: Estimated ADR: June _____	July _____	August _____
Estimated Seasonal ADR: _____		

For the next few questions, please think only of guests who are staying for less than 30 nights.

7. On average, how many nights did a typical guest stay in your property between **June 1, 2005 and August 31, 2005**?

Average # of nights	
----------------------------	--

8. What was the average number of guests staying in one room during the **June 1, 2005 to August 31, 2005** time period?

Average Party Size	
---------------------------	--

9. During the period **June 1, 2005 to August 31, 2005**, what percentage of your room-nights were rented to guests traveling for...

Pleasure/Personal:	%
Business:	%
Meetings/conventions:	%

10. Between **June 1, 2005 and August 31, 2005**, what percentage of your guests were from...

Minnesota	%
Other US locations	%
Canada	%
Other international locations	%

Comments:	
------------------	--

DBNO: «dbno»	Type: «type»	County: «county»	Q1: «qt r1»	Q2: «q tr2 »	Q3: «qt r3»	Q4: «q tr 4»	Status: «status»
--------------	--------------	------------------	----------------	--------------------	----------------	--------------------	------------------

INTERVIEWER USE ONLY

TIME BEGAN USING THIS FORM _____

TIME COMPLETED _____

A. Are you a year-round, seasonal, or short-term/weekend resident of either this town or city or the immediate surrounding area?

Yes – Term:

01 02 03 04 05 06 07 08 09 10
11 12 13 14 15 16 17 18 19 20

No – Continue

B. Are you visiting this area for the day or have you/will you spend at least one night here?

Day visitor – Continue

Overnight – Give questionnaire to respondent

C. Have you traveled at least 50 miles from your primary residence to be here?

Yes – Give questionnaire to respondent

No – Term:

1 2 3 4 5 6 7 8 9



Dear Traveler:

Your visit to our area is very important to us. Please take a few moments to answer the following questions and return this questionnaire to the person who gave it to you.

Thank you very much. Your responses are very important.

1. What is your reason or reasons for visiting this area? (Please check all that apply)

(6)

1 [] Vacation/short pleasure trip

3 [] Convention/conference

2 [] Personal (wedding, funeral, medical, etc.)

4 [] Business/work

2. While on this trip, which of the following activities will members of your travel party participate in? (Please check all that apply)

(7-12)

General:

- 1 [] Casino gaming
2 [] Dining out
3 [] Driving on designated scenic byways
4 [] Nightlife/evening entertainment
5 [] Sightseeing/driving for pleasure
6 [] Taking in city sites
7 [] Viewing fall colors

Participating In:

- 1 [] Biking
2 [] Canoeing
3 [] Golfing
4 [] Fishing
5 [] Hiking
6 [] Motor boating/water skiing
7 [] Off-road ATV driving
8 [] Pool swimming
9 [] Lake/river swimming
1 [] Jet skiing
2 [] Wildlife viewing/bird watching
3 [] Hunting
4 [] Cross-country skiing
5 [] Downhill skiing/snowboarding
6 [] Ice fishing
7 [] Snowmobiling
8 [] Other activity

Visiting:

- 1 [] Amusement parks/carnivals
2 [] Art museums
3 [] Other museums
4 [] Friends or relatives
5 [] Historic sites
6 [] Indian areas
7 [] Indoor water parks
8 [] Outdoor water parks
9 [] State/national parks
0 [] Other attraction

Attending:

- 1 [] Classical music concerts
2 [] Fairs or festivals
3 [] Popular music concerts/shows
4 [] Professional sporting events
5 [] Amateur sporting events
6 [] Theater performances
7 [] Other events

Shopping:

- 1 [] For gifts or souvenirs
2 [] Outlet shopping
3 [] Arts, crafts, antiques
4 [] At the Mall of America
5 [] General/mall shopping

3. How many nights in total do you intend to stay in either this town or city or the immediate surrounding area on this trip?

of nights _____

(13-14)

4. How many nights have you already spent in this area on this trip?

of nights _____

(15-16)

5. Are you staying overnight (either last night or tonight)...

(17)

In paid accommodations:

- 1 At a hotel/motel/historic inn
- 2 At a Bed and Breakfast
- 3 At a vacation home/condo/cabin/houseboat you rented
- 4 At a resort (cabin/other indoor unit)
- 5 In an RV at a campground
- 6 In a tent at a campground

In accommodations with no charge:

- 7 At the home of family or friend
- 8 At vacation home/condo/cabin/houseboat of a family or friend
- 9 At your vacation home/condo/cabin/houseboat
- 0 At a campground with no fee

6. **Not** including this trip, how many times in the last 5 years have you taken a pleasure trip in Minnesota? (18)

- 0 1 2 to 4 5 to 10 More than 10

7. Including yourself, how many people are in your immediate travel party? (Please do **not** include your entire group if traveling on an escorted group tour, on business, or attending a convention/conference.) # _____ (19-20)

8. How many of those people are...

- Younger than 6 years old # _____ (21-22) 6 – 11 years old # _____ (23-24)
 12 – 17 years old # _____ (25-26) Adults # _____ (27-28)

9. Please tell us the amount **you and your immediate travel party** spent during **the past 24 hours in this area** in each of the following categories listed below. A few examples for each category are provided. If you have just arrived in this area, please estimate your expenses for the next 24 hours.

Spending Category	Amount Spent	
Lodging and Camping Accommodations (Fee FOR ONE NIGHT) <i>If you have not paid yet, estimate one night's cost.</i>	\$ _____ .00	(29-32)
Food and Beverages (meals, snacks, groceries, beer/wine/liquor "by the drink")	\$ _____ .00	(33-36)
Liquor Purchases (beer/wine/liquor "by the bottle")	\$ _____ .00	(37-40)
Sport Fees (outfitters, guides, gear rentals, greens fees, lift tickets)	\$ _____ .00	(41-44)
Events Admissions (sporting events, popular concerts, festivals)	\$ _____ .00	(45-48)
Cultural Performance Admissions (tickets for theater, opera, classical concerts, dance)	\$ _____ .00	(49-52)
Other Evening Entertainment (movies, clubs, lounges, etc.)	\$ _____ .00	(53-56)
Historic/Cultural Site Admissions (historic homes, sites, museums, exhibitions)	\$ _____ .00	(57-60)
Other Sightseeing/Attractions (tours, admissions)	\$ _____ .00	(61-64)
Shopping - Tourist (gifts, souvenirs, antiques, arts and crafts)	\$ _____ .00	(65-68)
Shopping - General (clothing, personal or household items)	\$ _____ .00	(69-72)

Ground Transportation (gasoline, parking, local bus, taxi, car rentals)	\$ _____ .00	(73-76)
Lottery Tickets (scratch-off tickets, Powerball, etc.)	\$ _____ .00	(77-80)
Gaming (gambling and legal betting activity)	\$ _____ .00	(6-9)
Licenses/Registrations/Permits (fishing, hunting, ATV, snowmobile, trail pass)	\$ _____ .00	(10-13)
All other, please explain: _____	\$ _____ .00	(14-17)

Now, a few questions for classification purposes only:

10. What is your age, please? # _____ (18-19)

11. What is your total annual household income before taxes? (20)

- | | | |
|---------------------------|-----------------------------|-----------------------------|
| 1 [] Less than \$25,000 | 4 [] \$50,000 – \$74,999 | 7 [] \$125,000 – \$149,999 |
| 2 [] \$25,000 – \$34,999 | 5 [] \$75,000 – \$99,999 | 8 [] \$150,000 or more |
| 3 [] \$35,000 – \$49,999 | 6 [] \$100,000 – \$124,999 | |

12. Are you: 1 [] Male 2 [] Female (21)

13. Are you: *(Please check all that apply)* (22)

1 [] American Indian 2 [] Asian 3 [] Black 4 [] Hispanic 5 [] White 6 [] Other _____

14. Are you currently a resident of: (23)

- | | | |
|-----------------------|--------------------------------|---------|
| 1 [] United States | → Current home Zip Code: _____ | (24-28) |
| 2 [] Canada | | |
| 3 [] Another country | → Please specify: _____ | |

For validation purposes only, we will randomly contact participants to verify their answers. Results will not identify you with your answers and all answers will be reported in total. Your personal information will never be sold or used for marketing. Please provide us with the following information for validation only:

Name: _____ Phone Number: () _____ Email Address: _____

THANK YOU FOR YOUR HELP!

201 Lafayette Center
Kennebunk, ME 04043

Date: _____
Time Begun: _____

Quarterly Resident Survey -- Minnesota Tourism Study

Employee ID:

Speak to Head of Household:

Hello, I'm _____ from *Davidson-Peterson Associates*, a marketing research firm specializing in Travel & Tourism. We are talking to people in your area to learn more about vacation trips associated with visiting friends and family for Explore Minnesota and the State of Minnesota.

May I speak with the male or female head of household?

(IF TRANSFERRED TO ANOTHER ADULT, REPEAT INTRODUCTION. IF CONTINUING WITH THE SAME INDIVIDUAL WHO ANSWERED THE TELEPHONE, CONTINUE BELOW.)

May I ask you a few quick questions? This is not a sales call and your individual responses will remain strictly confidential. It should take only 3 or 4 minutes of your time.

First, is this your primary residence, meaning you spend a majority of your time living at this address?

- Yes (CONTINUE SURVEY)
- No (TERMINATE)

Are you eighteen years or older?

- Yes (CONTINUE SURVEY)
- No (TERMINATE)

1. Now, by visiting friends and relatives, we mean those people whose visit is considered non-routine -- please do not include routine visits by the same people, such as college students home for vacation. We're interested in those people who are on a vacation or non-routine trip.

Over the 3 month period of September, 2005 through November, 2005, on how many occasions did you have friends or relatives stay overnight in your home for at least one night on non-routine visits?

Number of occasions: _____

None - 00

Skip to Q.5

For Each Occasion:

2. Think about the **last** time you had friends or relatives visit. In what month was that? **(Record Below)**

3. How many people stayed with you on that occasion? **(Record Below)**

4. And, how many nights did they stay with you? **(Record Below)**

Repeat For Each Occasion (Transition: And, how about the time before that?)

Start With Last/Most Recent Occasion:

Q.2 - Month	Q.3 - # of People	Q.4 - # of Nights
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

If more than 14 occasions, enter the average # of people and nights for the remaining occasions, otherwise, skip to question 5.

Average # of people: _____ Average # of nights: _____

If more than 14 occasions, enter the average # of people and nights for the remaining occasions, otherwise, skip to question 12.

Average # of **Family**: _____ Average # of **Guests**: _____

Average # of Nights: _____ Average # of Nights: _____

13. In total, including yourself, how many people live in your household?
of people: _____

14. What is the ZIP code of your home address? _____

15. In which county is your home located? _____

Respondent Name: _____

Record Gender: Male []-1 Female []-2

Phone number: _____

Thanks for taking the time to complete this survey. Your information is greatly appreciated. For verification purposes, you might be contacted in the future to go over the information you provided today. Once again, thanks.