

**Study of Current Area Visitors:
Otter Tail Country 2007**

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EXECUTIVE SUMMARY

In Minnesota between 2005 and 2006, 41 million visitors spent \$11.786 billion (Davidson-Peterson, 2006). Of course, regional differences likely exist among these visitors and exploring this variation can inform tourism planning and development and subsequently enhance visitor experiences and destination revenue. The University of Minnesota Tourism Center and Explore Minnesota Tourism began partnering in 2000 to identify community and regional level travel data. This project continues those efforts with a focus on Otter Tail Country. Otter Tail Country is located in West Central Minnesota and includes communities of Fergus Falls, Pelican Rapids, and Perham.

Methods

An on-site questionnaire was administered to systematically selected and self-identified visitors at a variety of businesses serving visitors in Otter Tail Country. Sampling occurred at predetermined sites, randomly assigned, throughout a twelve-month period from July 2006-July 2007. A total of 487 people identified themselves as visitors and 432 questionnaires were completed. One questionnaire was unusable and an 88.5% effective response rate was obtained. Completed questionnaires were entered, cleaned and checked in SPSS version 12.0.

Results

Demographics

Respondents were typically baby boomers with high-income status. Respondents reported an average age of 48.0 years (range 19 to 91 years). The most frequently cited income was between \$75,000 and \$99,999 (25.0%). Respondents' household composition was predominately couples with grown children (35.0%) or couples with children younger than 18 years of age (31.9%).

Primary Destination and Reason for Travel

More than three quarter of respondents indicated Otter Tail Country was their primary destination (76.1%). Among the communities listed as potential destinations, the most frequently cited were Fergus Falls (45.3%), Pelican Rapids (16.8%), Ottertail City (9.4%), and Perham (9.4%). Almost half (41.8%) indicated their primary reason for travel was for pleasure or recreation.

Visitation History, Information Sources and Trip Planning

A majority of respondents were repeat visitors (87.6%). Information sources rated most important for trip planning were previous visit, recommendation from friend or relative, and the Internet. Visitors typically planned their trip and sought accommodations between six and seven weeks prior to the trip.

Important Destination Features

Among more than forty destination features provided, the most important features in choosing a place to visit were the natural environment, fall colors, and scenic drives. In Otter Tail Country, the features most frequently experienced were small town feel (49.2%), scenic drives (43.2%),

and shopping (41.5%). Visitors were satisfied with the majority of destination features they experienced.

Travel Characteristics

Respondents averaged three people per travel party ($\bar{M}=3.3$) and were in Otter Tail Country an average of three nights ($\bar{M}=3.3$). Almost a third of respondents indicated an overnight stay in a hotel (30.9%). On average, in the previous 24-hour time period, respondents individually spent the most on lodging ($\bar{M}=\$61.80$). Shopping accounted for the second highest expenditure category, with an average of \$35.88.

Intentions to Return to Region

A majority of respondents indicated they will probably or definitely return within the next year (87.4%) or next five years (89.9%).

Visitor Profiles

To delineate and describe visitors, factor analysis of destination feature importance items was conducted. This analysis, which found statistical commonality among the destination features, created three factors which were named: nature/cultural, active recreation, and motors and sports. Nature/cultural and motors and sports were more important to repeat than first time visitors. Common among the three factors was the importance of newspapers or magazine ads for destination awareness. Different was the Internet, more strongly correlated with active recreation, and friends and relatives, more strongly correlated with nature/cultural.

Discussion

Visitors in the 2006-2007 time frame to Otter Tail Country are comparable to regional visitors (Davidson-Peterson, 2006) in that they are boomers who travel in party sizes of three people for about three nights. Also like regional visitors, respondents were interested in a variety of experiences.

Otter Tail Country attracts a range of visitors who are generally satisfied with their experiences, as evidenced by their satisfaction level, repeat visitation, and intention to return. Such a satisfied base is noteworthy as travelers use recommendations from friends and families so frequently when they travel. The high percent of repeat visitors can also challenge a destination to ensure the product and experiences retain their attractiveness and not stagnate. Novelty within the experience may be particularly important with the baby boomer market.

Opportunities to extend the tourism benefits include capitalizing on outdoor recreation experiences deemed important by respondents, extending trip length, targeted marketing, and increased spring marketing. Consideration to expanding conference opportunities in the area may be worthwhile.

To address the important attributes in a destination as well as possibly extend trip lengths, additional attention to nature based opportunities appears in order. Visitors indicated nature based opportunities were important to destination choices. Among the top ten most important features, seven were nature based. Five of which, less than a third of visitors experienced or

participated in during their trip. Reasons for this could include a lack of awareness or a lack of time. As such, increasing awareness of the variety of experiences and enticing visitors to extend their current stay or return to participate in them may be of value. Any such efforts to increase awareness should obviously pay attention to the travel information sources used for trip awareness and planning, as well as those communication mediums for the markets of interest (nature/culture, active, and/or motor & sports).

Another possible venue to lengthen visitor stays is the creation or enhanced awareness of packages. Certainly tying in the current experiences of small town feel and scenic drives with important, but unrealized experiences such as visits to parks and lake-based recreation is feasible. Ideas such as nature meanders (comparable to the Meander Art Crawl), scavenger hunts within the region or targeted spring wildlife opportunities may meet visitor needs and provide revenue in the shoulder seasons. Further, targeting both family and couple getaway opportunities would be advantageous to address the current travel groups.

To maximize visitor spending, ensuring effective marketing of local restaurants and recreational opportunities is suggested. For instance, only an approximate one-quarter of respondents reported expenditures in the recreation category, which included attractions, entertainment, and casinos. Given the importance of recreational experiences to visitors and the number of opportunities in the area, an opportunity to increase expenditures exists.

Otter Tail Country possesses many attractive features that are also important to visitors. Capitalizing on these features by increasing awareness and opportunities to experience them can lead to increased economic impacts and heightened visitor experiences.

TABLE OF CONTENTS

Executive summary.....	ii
Table of Contents.....	v
Introduction.....	1
Methods.....	1
Study Setting.....	1
Questionnaire.....	1
Approach.....	1
Response Rate.....	2
Analysis.....	2
Results.....	2
Respondents.....	2
Primary Destination and Reason for Travel.....	3
Visitation History and Trip Planning.....	3
Important Destination Features.....	3
Travel Characteristics.....	4
Intentions to Return to Region.....	4
Visitor Profiles.....	4
Discussion.....	5
References.....	7
Appendices.....	8
A. Survey Instrument.....	9
B. Survey Intercept Sites.....	12

C. Front End Questionnaire14

D. Tables and Figures15

INTRODUCTION

In Minnesota, 41 million visitors spent \$11.786 billion (Davidson-Peterson, 2006a). Regional differences likely exist in these visitors and exploring this variation informs tourism planning and development. Statewide data is typically segmented into the four regions of Explore Minnesota Tourism: North Central/West, Northeast, Metro, and Southern. While regional tourism data is available (e.g. Davidson-Peterson, 2006b), local level data is not as readily available but still desirable to inform tourism development, marketing and planning. Therefore, the purpose of this study was to identify the consumer profile in a local area: the Otter Tail Country.

The University of Minnesota Tourism Center and Explore Minnesota Tourism began partnering in 2000 to identify community and regional level travel data. This project continues those efforts with a focus on Otter Tail Country. Visitor demographics, preferred destination features, travel information sources, travel characteristics, expenditures, and familiarity with area were of specific interest. The study methods and results are presented below, followed by a discussion.

METHODS

An on-site questionnaire was administered to visitors to Otter Tail Country between July 2006 and July 2007. The methods for the questionnaire administration are presented in the following sections: study setting, questionnaire, approach, response rate, and analysis.

Study Setting

The region is located in West Central Minnesota and boasts 1,000 lakes and streams. Otter Tail Country affords visitors water based recreation, scenic byways, cultural attractions, among other attractions. Working closely with area tourism organizations, a cluster of communities were identified that comprised the Otter Tail Country. Communities included in the project include Battle Lake, Dalton, Fergus Falls, Pelican Rapids, New York Mills, Ottertail City, and Perham.

Questionnaire

An on-site questionnaire was developed, based on previous studies conducted in other regions, and refined with the assistance of the community partners. Questionnaire sections included trip destination, important trip features, region familiarity, trip characteristics (length of stay, accommodation type, expenditures, and group size), information sources, and demographics (Appendix A). Given that several other studies used very similar questionnaires for the same purpose, a pre-test was not conducted.

Approach

A comprehensive list of Otter Tail Country businesses serving visitors was identified as survey sites in cooperation with community partners. Interview schedules were then designed to reach a

diverse cross section of current and potential visitors. Sampling occurred at predetermined sites, randomly assigned, throughout the twelve-month study period (July 2006-July 2007). Sites consisted of accommodations, attractions, festivals or special events, retail establishments, and restaurants (See Appendix B for a full list).

On site, a systematic intercept sampling approach was implemented where every third person was approached. Tourism Center field researchers then asked a few questions to ascertain whether potential respondents met the definition of visitor (self-identified, i.e. out of home community; Appendix C). If a potential respondent was identified as a visitor, they were asked to complete the on-site questionnaire.

Response Rate

A total of 1,191 parties were contacted throughout the course of the study period, of which more than one third (40.9%) identified as visitors. Among the 487 self-identified visitors, a total of 432 visitors were willing to participate in the study (88.7% compliance rate; Appendix D, Table 1). One questionnaire was unusable and 431 useable questionnaires were completed. Completed questionnaires had a relatively even distribution across the seasons, although summer had a slighter higher completion rate (37.6%; Appendix D, Table 2). Similarly, visitors were intercepted across a range of venues. The greatest percent of visitors were captured at accommodations (37.0%), while attractions accounted for the least (7.7%; Appendix D, Figure 1).

Analysis

Completed questionnaires were entered, cleaned and checked in SPSS version 12.0. Extreme outliers were winsorized to bring highly skewed variables into usable ranges. Descriptive analysis provided means, standard deviations, and frequencies to describe the sample and provide information on variables of interest.

RESULTS

Respondents

More than half (54.4%) of respondents were female and reported an average age of 48.0 years (Appendix D, Table 3). Almost half (48.1%) of respondent's reported an annual household income between \$50,000-99,999 (Appendix D, Figure 2). The remainder of respondent income was relatively evenly distributed across all income categories. More than one third (35.0%) of respondents indicated their household was comprised of a couple with grown children, while an additional third of respondent households were comprised of a couple with children less than 18 years (31.9%; Appendix D, Figure 3).

Respondents' predominately traveled fewer than 200 miles. A majority (50%) of respondents indicated their primary residence was between 0 and 100 miles from an Otter Tail Country centralized midpoint, specified as the Fergus Falls zipcode (Appendix D, Figure 4). Nearly one

third (32%) resided 101 to 200 miles away and a tenth (9%) resided 201-500 miles away. An additional tenth (9%) indicated they resided more than 500 miles from Fergus Falls.

Primary Destination and Reason for Travel

More than three quarter of respondents indicated Otter Tail Country was their primary destination (76.1%). Among the communities listed as potential destinations, the most frequently cited destinations were Fergus Falls (45.3%), Pelican Rapids (16.8%), Perham (9.4%), and Ottertail City (9.4%; Appendix D, Figure 5). Almost half (41.8%) indicated their primary reason for travel was for pleasure or recreation (Appendix D, Figure 6). The second most frequently cited reason for travel was business/convention/meeting (12.4%). The least cited reasons for travel were 'other' (3.8%) and education or learning (0.3%).

Visitation History and Trip Planning

A majority of respondents were repeat visitors (87.6%; Appendix D; Figure 7). Among new visitors, almost half stated their trip in Otter Tail Country was exactly what they expected (45.5%), while the other half specified the trip exceeded their expectations (52.3%). Among repeat visitors, respondents most frequent initial exposure to the area was either through visiting friends and relatives (28.9%), being born or raised in the area (18.8%), or vacation (17.0%; Appendix D; Figure 8). Repeat visitors averaged five trips to Otter Tail Country in the previous year (\underline{M} =5.4) and had been visiting the area for almost twenty years (\underline{M} =17.9).

Respondents typically planned their trip between six and seven weeks prior to travel (\underline{M} =44.7 days). Of those who made lodging reservations, advance reservations were typically made within a similar timeframe (\underline{M} =46.7 days).

With regard to creating an awareness of the area and planning for the trip, information sources rated most important were previous visit, recommendation from friend or relative, and the Internet (Appendix D, Table 4).

Important Destination Features

Among more than 40 destination features provided, the most important in choosing a place to visit were natural environment (\underline{M} =3.3), fall colors (\underline{M} =3.2), and scenic drives (\underline{M} =3.2; Appendix D, Table 5). The least important features were ATV trails (\underline{M} =1.7) and BMX racing (\underline{M} =1.5).

When asked if these features were experienced in Otter Tail Country, the most frequently cited were small town feel (49.2%), scenic drives (37.3%), and shopping (41.5%). The features respondents were the least likely to have experienced were BMX racing (1.8%) and cross-country skiing (0.9%).

Visitors were generally satisfied with their experiences in Otter Tail Country. Among the top ten most experienced features, each had a mean satisfaction rating above 3.3 (rated on a scale from 1

to 4, where 1=not at all satisfied and 4=very satisfied). Among all features listed, only four had satisfaction ratings below three: casino or gaming, snowmobiling, ATV trails and BMX racing.

Travel Characteristics

Respondents averaged three people per travel party (\underline{M} =3.3), with a range of one to 10. Fewer than one tenth of respondents indicated their travel party consisted of international visitors (6.3%). Overall, respondents were away from home an average of three nights (\underline{M} =2.8). Of those who spent the night in Otter Tail Country, the average nights stay was similar (\underline{M} =3.3).

Predominantly, respondents indicated an overnight stay in a hotel (30.9%), with an average stay of two nights (\underline{M} =1.8; Appendix D; Table 6). A home of a friend or relative accounted for the second most cited accommodation type (8.6%), with an average stay of four nights (\underline{M} =3.8). The least frequently specified accommodation types were 'other' (0.7%) and B & B (0.7%).

On average, in the previous 24-hour time period, respondents individually spent the most on lodging (\underline{M} =\$61.80; Appendix D, Table 7). Shopping accounted for the second highest expenditure category, with an average of \$35.88. Respondents reported moderate spending on restaurant food and beverages (\underline{M} =\$34.64), transportation (\underline{M} =\$31.66), groceries (\underline{M} =\$19.14), and recreation (\underline{M} =\$18.62). Respondents spent the least amount on 'other' (\underline{M} =\$4.08) and guides/outfitting..

Intentions to Return to Region

Overall, respondents indicated an intention to return to the area. Approximately two thirds of respondents indicated they will definitely return next year (61.8%) and an additional quarter will probably return (25.6%). Similarly, two thirds definitely intend to return within the next five years (65.9%) and two tenths (24.0%) will probably return.

Respondents were least interested in returning to the area in the winter (\underline{M} =2.9; rated on a scale from 1 to 4, where 1=not at all interested and 4=very interested) and most interested in returning during the spring (\underline{M} =3.7). Fall and summer were also seasons of interest for a return visit (\underline{M} =3.5 and 3.4, respectively).

Visitor Profiles

In an effort to further delineate and describe visitors, the 41 destination feature importance items were factor analyzed¹. Several items cross-loaded or failed to load and were dropped from the analysis. A total of 18 items remained and a three-factor structure emerged, labeled nature/cultural, active recreation, and motors and sports (\underline{M} =2.8, 2.3, and 2.2, respectively; Appendix D, Table 8). Combined these factors explained 59.6% of the variation. The destination features had reliability coefficients that ranged from .75 (active recreation) to .90

¹ Factor analysis is a statistical procedure that can be used to analyze interrelationships among a large number of variables and used to explain these variables in terms of their common underlying dimensions (factors). The procedure essentially condenses the information contained in a number of original variables, based on patterns in the data, into a smaller set of dimensions (factors), with a minimum loss of information.

(nature/cultural). Moreover, most of the factor loadings were above .60, indicating a relatively high correlation between the factors and their items.

A comparison of new visitors and previous visitors resulted in significant differences in means among two of the factors. Specifically, repeat visitors felt nature/cultural tourism and motor and sports opportunities were more important than first time visitors. New visitors rated the importance of the nature/cultural tourism factor lower than previous visitors (\bar{M} =2.9 and 2.6, respectively; $t = -2.0$, $p < .05$). Similarly, motors and sports importance was rated lower among new visitors than previous visitors (\bar{M} =2.2 and 1.7, respectively; $t = -3.1$, $p < .01$).

Several significant correlations emerged between the factors and the information sources used to create an awareness of the area (Appendix D, Table 9). All of the information sources ratings were significantly correlated with motors and sports opportunities, while fifteen were significantly correlated with active recreation. Fourteen information sources ratings were significantly correlated with nature/cultural tourism.

DISCUSSION

Visitors in the 2006-2007 time frame to Otter Tail Country are comparable to regional visitors (Davidson-Peterson, 2006) in that they are boomers who travel in party sizes of three people for about three nights. Also like regional visitors, respondents were interested in a variety of experiences.

Otter Tail Country attracts a range of visitors who are generally satisfied with their experiences, as evidenced by their satisfaction level, repeat visitation, and intention to return. Such a satisfied base is noteworthy as travelers use recommendations from friends and families so frequently when they travel. The high percent of repeat visitors can also challenge a destination to ensure the product and experiences retain their attractiveness and not stagnate. Novelty within the experience may be particularly important with the baby boomer market.

Opportunities to extend the tourism benefits include capitalizing on outdoor recreation experiences deemed important by respondents, extending trip length, targeted marketing, and increased spring marketing. Consideration to expanding conference opportunities in the area may be worthwhile.

A majority of respondents came to Otter Tail Country for pleasure. While visitors were generally satisfied with their experiences, a gap appears between important destination experiences and those experienced by the current travel base. Most notably, visitors indicated nature based opportunities were important to destination choices. Among the top ten most important features, seven were nature based. Five of which less than a third of visitors experienced or participated in during their trip. Although this study did not investigate reasons for lack of participation, one potential explanation is that they simply are unaware of the opportunities within the area. If so, additional marketing of the outdoor opportunities is essential. Another potential explanation is that visitors simply do not have the time to enjoy the natural features as they are caught up in other activities during their visit. If so, an opportunity exists to extend the stay or incorporate enhanced nature based opportunities in subsequent visits. Within

these nature-based opportunities, attention to differentiating the marketing information and mediums for nature/cultural and the active recreation interest should be implemented.

Two additional market increases exist: business travel and international travel (specifically, Canada). Given the infrastructure exists and there is about one-tenth of business travel in the area, potential exists to expand business/meeting travel. Ensuring that meeting planners are aware of the opportunities, that the distance is not insurmountable and that the opportunity to get away has benefits will be essential to capturing more of this business within the region. Similarly, fewer than ten percent of travelers included international guests. While the current administrative climate may be challenging, there is a substantial market north of the Minnesota border that deserves attention. The exchange rate and border crossing procedures will influence the realization of any international tourism share.

Like the majority of travelers in Minnesota and the United States, word of mouth and the Internet were important vehicles for exposure to the area and subsequent travel planning (e.g. Gartner & Salk, 2005; Gartner & Salk, 2004). Newspaper or magazine ads also lead to increasing awareness of the destination and related opportunities. As such, marketing should target Internet and print in the format of newspapers and magazines within the marketing area. With respect to the Internet, important considerations for website development and maintenance are attention to navigational ease, such as integrated linkages, as well as attention to individual sites that are dynamic and continually updated. Ensuring that visits are high quality and satisfactory will be important so that visitors can leave with positive impressions and spread the word about the area. Certainly ensuring local residents are familiar with all of the offerings, both new and existing, is also essential such that they can inform potential visitors of available opportunities. With respect to information sources used to create awareness of the area by the important destination feature factors, none of the information sources were consistently moderately or significantly related across the three factors (nature/cultural, active recreation, and motor and sports). Still, the relationships are important to consider. The strongest relationships between information sources and destination features were for motors and sports activities, followed by nature/cultural and active recreation. For motors and sports, newspapers or magazine ads were the most strongly related information sources, followed by article or documentary. For nature/cultural activities, previous visit, newspaper or magazine ad, and friends/relatives were most strongly related. For active recreation destination features, a newspaper or magazine ad, followed by the Internet and article or documentary were the most strongly related. These differences speak to mediums that can be used most effectively to capture various markets of interest.

Similar to regional and state data, visitor trips were of short duration—three days (Davidson-Peterson, 2006b). Efforts to lengthen visitor's stay could include enhanced exposure of area offerings and festivals or special events, as well as enhancing or continuing packages. Certainly tying in the current experiences of small town feel and scenic drives with important, but unrealized experiences, such as visits to parks and lake-based recreation is feasible. Ideas such nature meanders (comparable to the Art Meander), scavenger hunts within the region or targeted spring wildlife opportunities may meet the needs of visitors and provide revenue in the shoulder seasons. Also of interest is the bifurcated markets of those with and those without children under 18 in their household. Thus, targeting both family experiences and couple getaway opportunities

is essential. In a similar vein, shoulder season marketing is also suggested, given visitors expressed heightened interest in spring and fall return visitation.

With regard to visitor spending, lodging accounted for the highest expenditure. Shopping was also a high expenditure category. To maximize visitor spending, marketing local restaurants and recreational opportunities is suggested. For instance, only an approximate one-quarter of respondents reported recreational expenditures, which included attractions, entertainment, and casinos. Given the importance of recreational experiences to visitors and the number of opportunities, there is significant opportunity to increase expenditures.

Otter Tail Country possesses many attractive features to draw visitors, many of which are important to visitors. To maximize tourism benefits, extended stays that highlight the experiences visitors seek in nature/cultural, motors and sports, and active recreation areas is encouraged. Specifically tailoring to these desired experiences could enhance market share, increase tourism potential, and enhanced economic impact.

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APPENDICES

APPENDIX A

Survey Instrument

**University of Minnesota Tourism Center
Otter Tail Country Visitor Profile Survey**

Is Otter Tail Country your primary destination for this trip? (Mark ONE) Yes No

If YES, which community is your primary destination? (Mark ONE)
 Battle Lake Dalton Fergus Falls New York Mills
 Ottertail City Pelican Rapids Perham Other _____

If NO, what is your final destination for this trip?

What is the primary reason that you made this trip to Otter Tail Country? (Mark ONE)

Business / convention / meeting Festival / special event: _____ Sporting event / tournament
 Combined business and pleasure Just passing through Visiting friends / relatives
 Education / learning Own a vacation home in the area Other _____
 Pleasure or recreation Personal: wedding, medical, reunion, etc.

	1. In general, how important is EACH feature in choosing a place to visit?					2. Did you experience this feature on THIS trip?		3. For each feature you experienced, how satisfied were you with this feature on your trip to Otter Tail Country?							
	Not at all important	1	2	3	4	Very important	No preference	Yes	No	Not at all satisfied	1	2	3	4	Very satisfied
American Indian heritage	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Antiques	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
ATV trails	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Auto racing	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Biking trails	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Bird / wildlife viewing	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
BMX racing	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Boating	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Camping	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Canoeing/kayaking	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Casino or gaming	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
County parks / forest	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Cross-country skiing	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Cultural sites or tours	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Entertainment / nightlife	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Fall colors	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Farmers market	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Festival or special event	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Flea market	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Fishing	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Golf courses	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Hiking trails	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Historical buildings/sites	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Hunting	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Local arts and crafts	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Lots of activities / attractions	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Museums	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Natural environment	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Performing arts	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Photography	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Scenic drives	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Shopping	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Sightseeing	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Small town feel	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Snowmobiling	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Specific accommodation	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Sporting tournaments	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
State / federal wildlife refuge	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
State parks	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Swimming	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>
Waterpark	1	2	3	4	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	<input type="checkbox"/>	<input type="checkbox"/>

For Official Use: Date _____ Season _____ Site type _____ Site name _____

APPENDIX B

Survey Intercept Sites

Accommodations

Four Seasons Resort, Rush Lake
AmericInn, Fergus Falls
Best Western, Fergus Falls
Comfort Inn, Fergus Falls
Elm Haven Resort, Rush Lake
Fisherman's Resort, Ottertail City
Golden Eagle KOA, Perham
Linden Shores Resort, Pelican Rapids
Sand Bay Resort, Battle Lake
Shady Grove Resort, Ottertail City
Super 8, Fergus Falls
Super 8, Perham
Swan Lake Resort, Fergus Falls
Three Seasons Resort, Pelican Rapids
Thumper Pond Resort, Ottertail City
Whistle Stop B & B, New York Mills
Xanadu Island Resort, Battle Lake

Attractions

Glendalough State Park, Battle Lake
Maplewood State Park, Pelican Rapids
Red Horse Ranch Arena, Fergus Falls
Spidahl's Skigaard, Fergus Falls

Events

Art in the Park, Pelican Rapids
Art Leap Gallery Crawl, Fergus Falls
Holiday Parade of Lights, Perham
John Jenson's Sporting Goods Collectibles Show, Perham
Key Ingredients, Smithsonian Exhibit, Fergus Falls
Lake Region Pioneer Threshermen Fest, Dalton
Looney Days, Vergas
Maple Syrup Days, Pelican Rapids
Minnow Races, Pelican Rapids
SummerFest, Fergus Falls
Phelp's Mill Festival, Maine
Turtle Races, Perham
West Otter Tail County Fair, Fergus Falls

Retail

Dalton Outdoors, Dalton
Kum N' Go, Fergus Falls
Victor Lundeens, Fergus Falls

Restaurant

Apple Bees, Fergus Falls
Dalton Café, Dalton
Eagles Café, New York Mills
Greystone Lodge Restaurant, Ottertail City
Jazzy Fox Bistro, Fergus Falls
Mabel Murphy's, Fergus Falls
Muddy Moose, Pelican Rapids
Riverside Café, Pelican Rapids
Station House Restaurant, Perham
Tee Time Restaurant, Ottertail City

Appendix C

Front End Questionnaire

Date: _____

Location: _____

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

Appendix D

Tables and Figures

Table 1. Response rate among visitors to Otter Tail Country, 2006-2007.

	Frequency	Percent (%)
Total Parties Contacted	1191	
Residents	704	59.1
Visitors	487	40.9
Refusals	55	
Acceptance	432	88.7
Unusable	1	
Total Visitor Questionnaires	431	88.5

Table 2. Completed responses by season among respondents to the Otter Tail Country Visitor Profile study, 2006-2007.

	Frequency	Percent (%)
Summer	162	37.6
Fall	108	25.1
Winter	94	21.8
Spring	67	15.5
Total	431	100.0

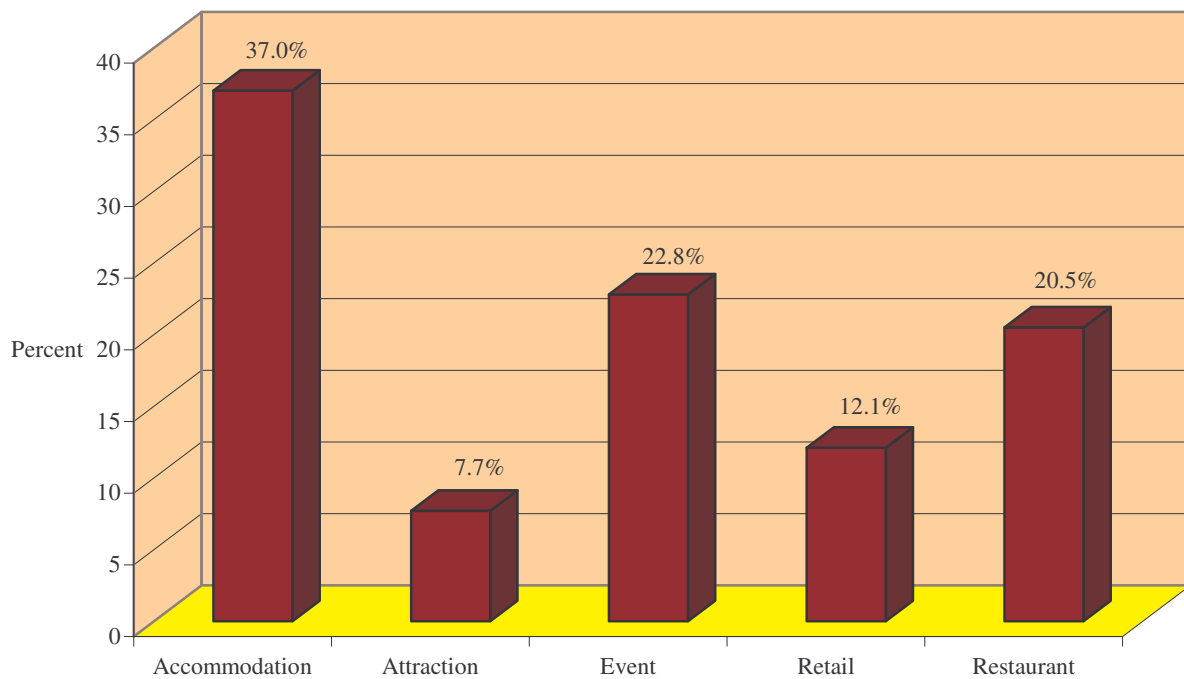


Figure 1. Location of respondent contact sites, in percent, for the Otter Tail Country Visitor Profile study, 2006-2007 (n=431).

Table 3. Demographic characteristics among respondents to the Otter Tail Country Visitor Profile study, 2006-2007.

	Frequency	Percent (%)
Gender		
Male	191	45.6
Female	228	54.4
Total	419	100.0
Age (M=48.0; S.D.=15.1)		
18-30	63	15.1
31-40	73	17.6
41-50	97	23.3
51-60	98	23.6
61-70	57	13.7
71 or older	28	6.7
Total	416	100.0

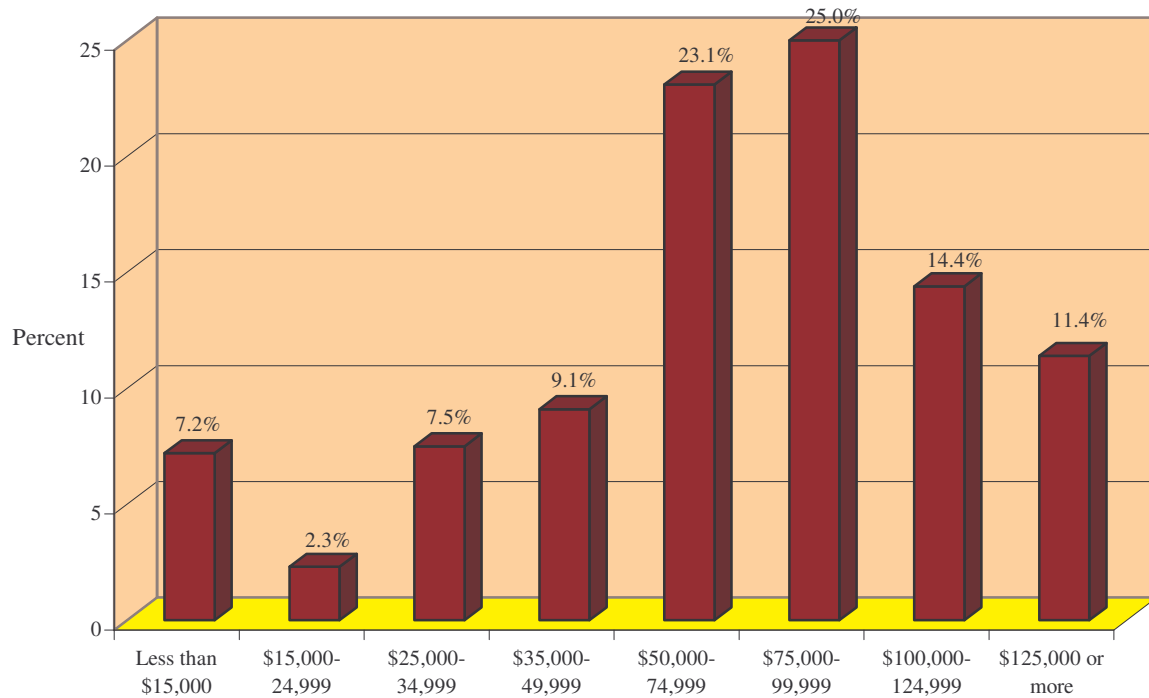


Figure 2. Annual household income among respondents to the Otter Tail Country Visitor Profile study, 2006-07 (n=264).

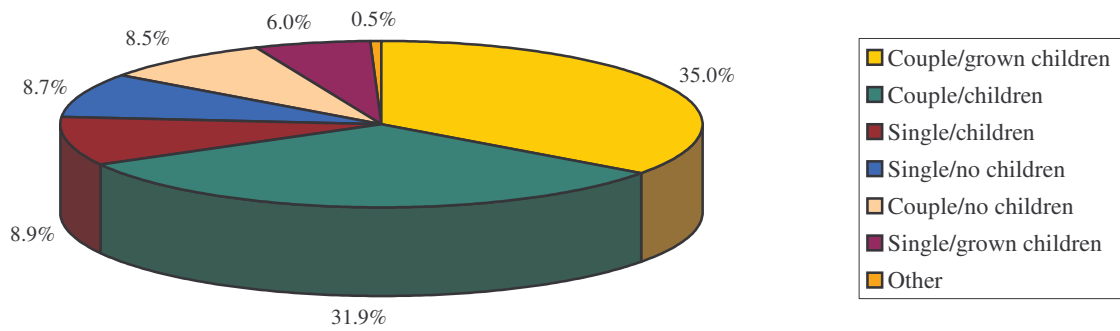


Figure 3. Household composition among respondents to the Otter Tail Country Visitor Profile study, 2006-07 (n=414).

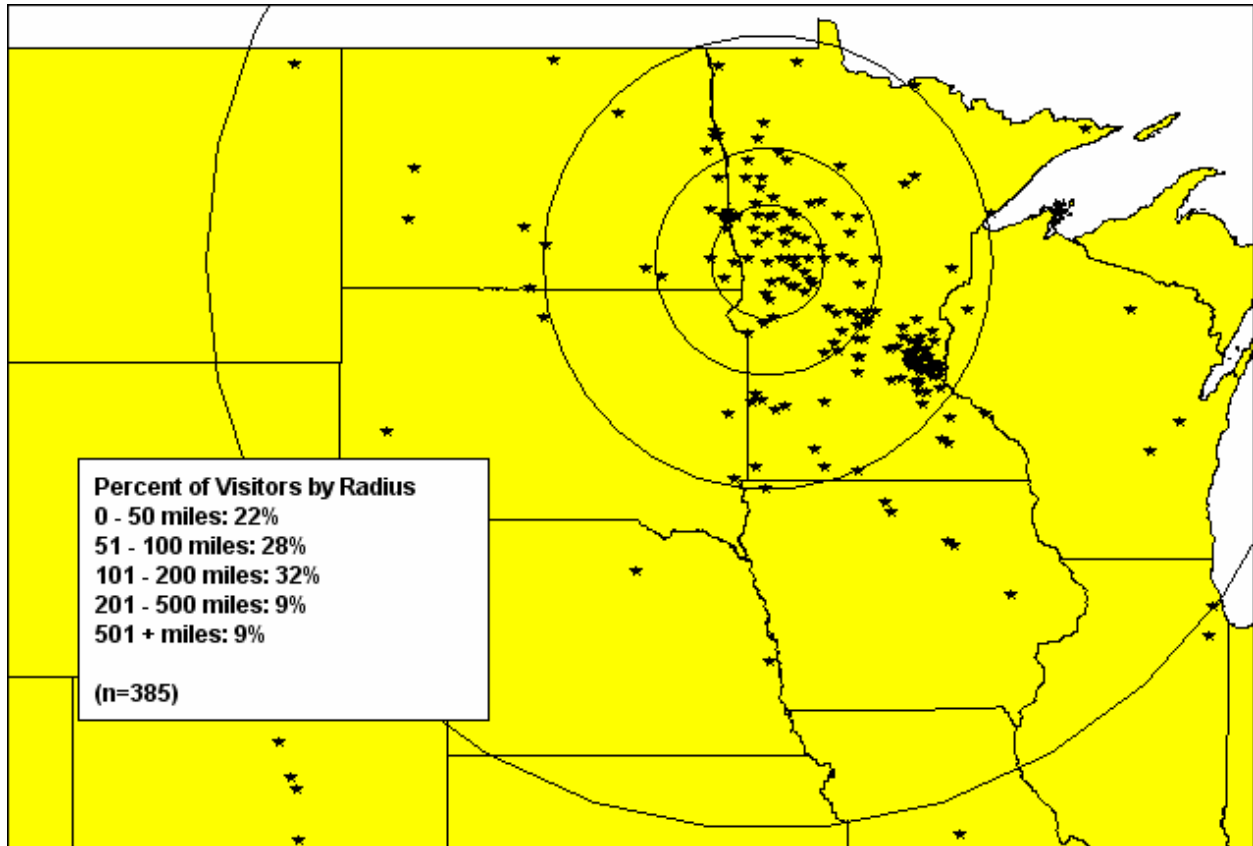


Figure 4. Radius map of respondent's primary residence among respondents to the Otter Tail Country Visitor Profile study, 2006-2007.

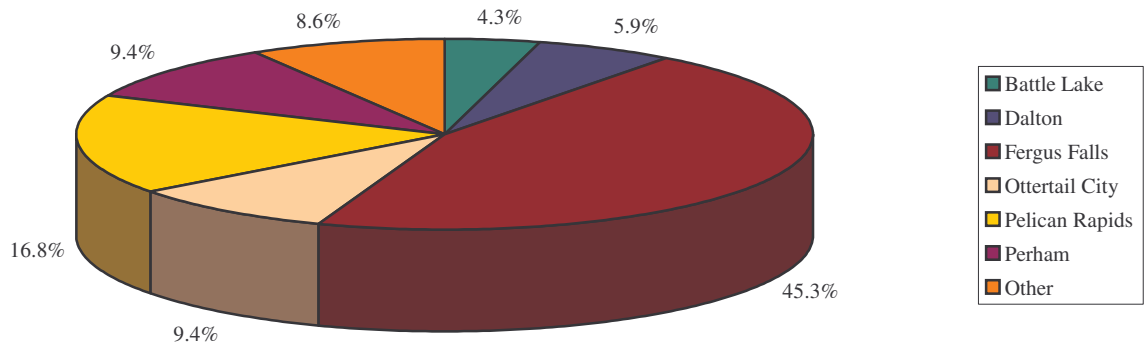


Figure 5. Primary destination in Otter Tail Country among respondents to the Otter Tail Country Visitor Profile study, 2006-2007 (n=256).

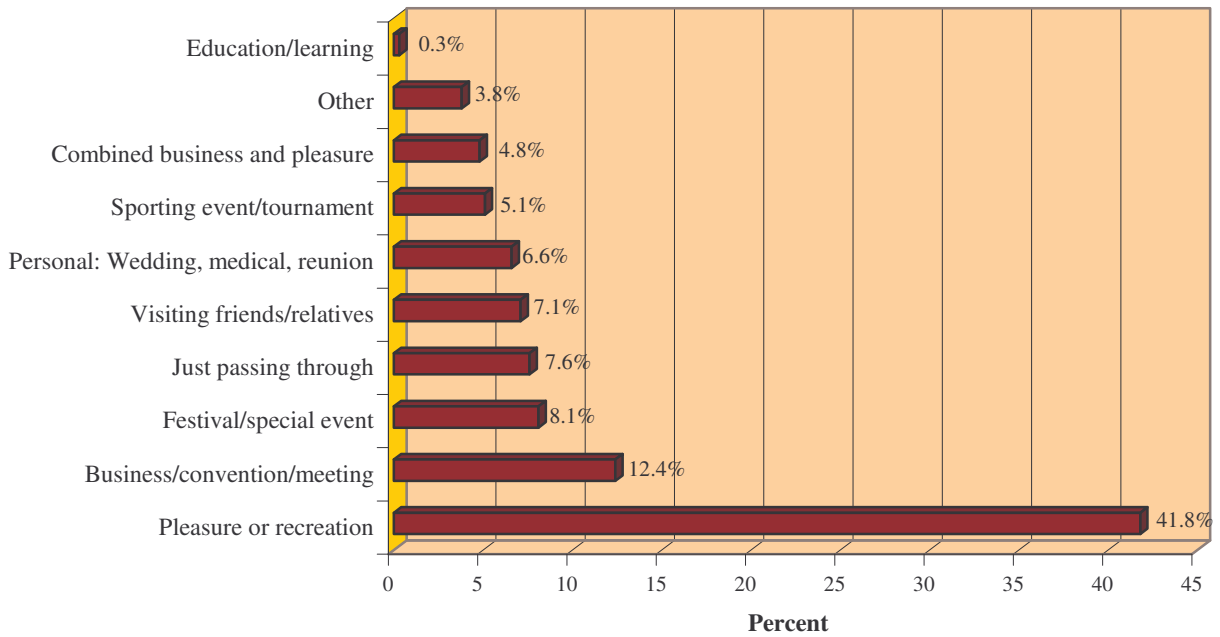


Figure 6. Primary reason for visiting Otter Tail Country among respondents to the Otter Tail Country Visitor Profile study, 2006-2007 (n=395).

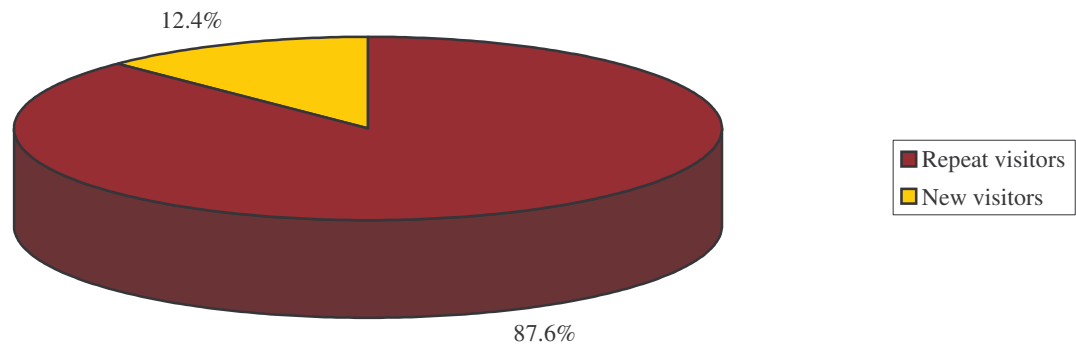


Figure 7. Otter Tail Country visitation history among respondents to the Otter Tail Country Visitor Profile study, 2006-2007 (n=388).

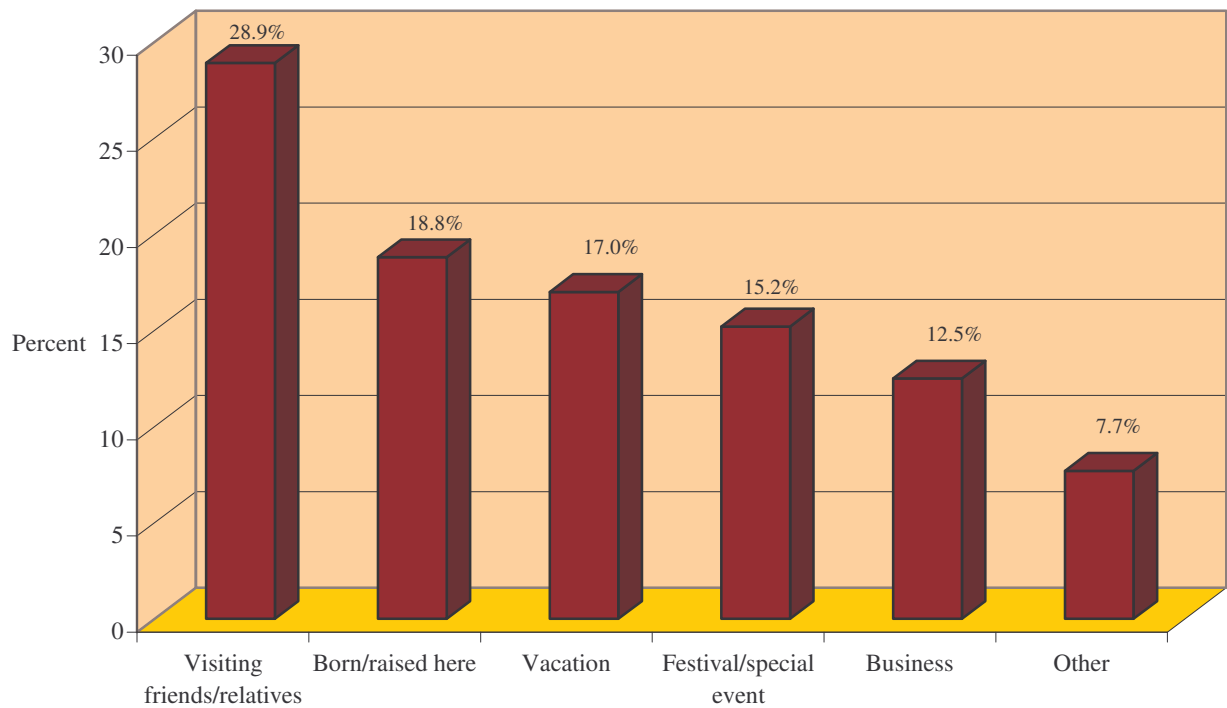


Figure 8. Respondent's first introduction to Otter Tail Country among respondents to the Otter Tail Country Visitor Profile study, 2006-2007 (n=336).

Table 4. Information sources among respondents to the Otter Tail Country Visitor Profile study, 2006-2007.

	Create awareness		Plan trip	
	<u>M</u> ¹	S.D.	<u>M</u> ¹	S.D.
Previous visit	2.8	1.4	2.8	1.4
Friend/relative recommendation	2.7	1.4	2.5	1.4
Internet	2.5	1.4	2.3	1.4
Newspaper/magazine ad	2.1	1.3	1.9	1.3
Area tourism information (Chamber/CVB)	2.0	1.2	1.5	1.0
State tourism information	1.9	1.0	1.6	1.0
Article/documentary	1.8	1.2	1.5	1.0
Visitor/welcome center	1.8	1.2	1.4	0.9
Direct mail	1.7	1.1	1.4	0.9
Radio/TV ads	1.7	1.1	1.4	0.9
Billboard	1.6	1.0	1.2	0.7
Automobile club	1.5	1.0	1.3	0.8
Business recommendation	1.5	1.0	1.5	1.0
Employer recommendation	1.5	1.1	1.4	0.9
Other	1.5	1.1	1.5	1.0
Sport show	1.5	1.0	1.3	0.8
Travel agency	1.5	0.9	1.3	0.7

¹ Rated on a scale from 1 to 4, where 1=not at all important and 4=very important

Table 5. Importance and satisfaction of trip destination features among respondents to the Otter Tail Country Visitor Profile study, 2006-2007.

	Importance (in general)		Experienced on this trip	Level of Satisfaction	
	<u>M</u> ¹	S.D.	Percent (%)	<u>M</u> ²	S.D.
Natural environment	3.3	1.0	37.3	3.6	0.6
Fall colors	3.2	1.1	19.0	3.6	0.7
Scenic drives	3.2	1.0	43.0	3.6	0.7
Camping	3.1	1.1	19.0	3.7	0.7
County parks / forest	3.1	1.1	16.3	3.5	0.7
Lots of activities / attractions	3.1	1.1	33.3	3.5	0.7
Sightseeing	3.1	1.0	35.6	3.5	0.7
State parks	3.1	1.1	14.5	3.6	0.7
Boating	3.0	1.2	20.0	3.8	0.5
Festival or special event	3.0	1.1	36.0	3.6	0.7
Small town feel	3.0	1.1	49.2	3.6	0.6
Fishing	2.9	1.2	17.6	3.6	0.8
Swimming	2.9	1.2	29.5	3.6	0.6
Entertainment / nightlife	2.8	1.2	28.6	3.3	0.9
Historical buildings/sites	2.8	1.2	12.2	3.5	0.7
Shopping	2.8	1.2	41.5	3.3	0.9
Bird / wildlife viewing	2.7	1.2	24.2	3.3	0.8
Cultural sites or tours	2.7	1.2	9.9	3.5	0.8
Hiking trails	2.7	1.2	8.9	3.3	0.8
Local arts and crafts	2.7	1.2	27.3	3.4	0.8
State / federal wildlife refuge	2.7	1.2	8.3	2.6	1.5
Farmers market	2.5	1.2	7.4	3.1	0.8
Biking trails	2.3	1.2	4.7	3.0	1.0
Flea market	2.4	1.2	8.0	3.0	0.9
Canoeing/kayaking	2.5	1.2	5.2	3.5	0.7
Museums	2.5	1.1	9.0	3.6	0.6
Performing arts	2.5	1.2	6.4	3.6	0.7
Photography	2.5	1.2	18.1	3.5	0.8
Specific accommodation	2.5	1.3	17.1	3.6	0.6
Golf courses	2.4	1.3	5.8	3.6	0.7
Hunting	2.3	1.3	5.3	3.4	0.7
Sporting tournaments	2.3	1.3	8.3	3.7	0.6
Waterpark	2.3	1.2	5.3	3.4	0.6
Antiques	2.2	1.2	16.8	3.4	0.8
Casino or gaming	2.0	1.2	3.8	2.8	1.4
Snowmobiling	1.9	1.2	4.4	2.8	1.1
Cross-country skiing	1.8	1.1	0.9	3.0	1.4
Auto racing	1.7	1.1	2.4	3.0	1.0
American Indian heritage	1.7	0.9	5.4	3.2	0.8
ATV trails	1.7	1.1	3.6	2.8	0.7
BMX racing	1.5	1.0	1.8	2.0	1.3

¹ Rated on a scale of 1 to 4 (1=not at all important, 4=very important)

² Rated on a scale of 1 to 4 (1=not at all satisfied, 4=very satisfied)

Table 6. Accommodation types and duration of stay among respondents to the Otter Tail Country Visitor Profile study, 2006-2007.

	Frequency	Percent ¹ (%)	Number of nights	
			<u>M</u>	<u>S.D.</u>
Hotel	133	30.9	1.8	0.9
Home of friend/relative	37	8.6	3.8	3.8
Vacation home of friend/relative	27	6.3	2.4	1.6
Campground	28	6.5	3.1	1.9
Cabin rental	24	5.9	8.1	3.2
Resort	17	3.9	5.2	2.4
Own vacation home	11	2.6	4.5	2.7
RV park	5	1.2	2.8	1.6
Other	3	0.7	2.3	0.6
B & B	3	0.7	1.7	0.6

¹ Based on the entire sample.

Table 7. Personal expenditures in Otter Tail Country communities among respondents to the Otter Tail Country Visitor Profile study, 2006-2007 (in US\$).

	<u>M</u>	<u>S.D.</u>	<u>Range</u>
Lodging (n=283)	61.80	71.15	0-250
Shopping (n=206)	35.88	53.30	0-200
Restaurant food and beverages (n=300)	34.64	35.19	0-150
Transportation (n=265)	31.66	26.29	0-100
Groceries (n=181)	19.14	31.61	0-100
Recreation (n=113)	18.62	32.01	0-100
Other (n=96)	4.08	12.75	0-50
Guides/outfitting (n=130)	0.28	1.61	0-10

Table 8. Factor loadings of important destination feature items among respondents to the Otter Tail Country Visitor Profile study, 2006-2007.

	Nature/ Cultural	Active Recreation	Motors & Sports
Sightseeing	.79		
Museums	.78		
Local arts and crafts	.77		
Scenic drives	.76		
Historical buildings/sites	.74		
Performing arts	.67		
Small town feel	.66		
Flea market	.62		
State / federal wildlife refuge	.60		
Biking trails		.79	
Cross-country skiing		.76	
Canoeing/kayaking		.71	
Autoracing			.81
BMX racing			.74
Hunting			.73
Snowmobiling			.71
Sporting tournaments			.71
Golf courses			.63
Scale Mean ¹	2.8	2.3	2.2
Alpha (α)	.90	.83	.75
Variance explained (%)	59.61		

¹ Measured on a scale of 1-4, where 1 =not at all important and 4=very important

Table 9. Correlations of destination features factors and information sources among respondents to Otter Tail Country Visitor Profile study, 2006-2007.

	Nature/ Cultural	Active Recreation	Motors & Sports
Area tourism information (Chamber/CVB)	.26**	.27**	.12*
Article/documentary	.36**	.32**	.33**
Automobile club	.18**	.20**	.13*
Billboard	.17**	.18**	.16**
Direct mail	.23**	.13*	.13**
Internet	.31**	.32**	.28**
Newspaper/magazine ad	.42**	.36**	.38**
Previous visit	.45**	.31**	.29**
Radio/TV ads	.25**	.27**	.19**
Business recommendation	.11	.15*	.22**
Friend/relative recommendation	.37**	.21**	.16**
Employer recommendation	.08	.11	.23**
Sport show	.12*	.11	.28**
State tourism information	.32**	.27**	.20**
Travel agency	.18**	.18**	.17**
Visitor/welcome center	.28**	.23**	.15*
Other	.17	.22*	.31**

**p<.01; *p<.05