



**Labovitz School**  
OF BUSINESS AND ECONOMICS

Bureau of Business and Economic Research

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# North Shore Interpretive Centers' Economic Influence

April 2006

Sugarloaf Interpretive Center Association



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Supported by Minnesota Power

This project was funded in part by the Coastal Zone Management Act, by NOAA's Office of Ocean and Coastal Resource Management, in cooperation with Minnesota's Lake Superior Coastal Program

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# North Shore Interpretive Centers' Economic Influence

## 1) Summary

**Project Description:** The UMD Labovitz School was asked to measure the impact of the North Shore Interpretive Centers and related entities on the economy of a three county area of Minnesota's North Shore. Data was provided from the ShoreLink database and was grouped by industry sector. Measures of economic activity are shown. Secondary literature was reviewed for estimates of economic multipliers.

This report presents background fact sheets for tourism in Minnesota, the northeast region, and the three counties of the study area, Cook, Lake, and St. Louis. The report identifies the NAICS industry sectors represented by a short list from the ShoreLink data. Entities are aggregated into three-digit sector aggregations. This study shows the economic influence of the short list, and makes comparisons between the short list and the sector as a whole. Secondary sources are used to shed light on the influence of the identified sectors. Comparisons are presented between the participating entities and the sector at large. The impact of some identified economic multipliers is discussed. Finally considerations are presented for creating a true impact study for these industry sectors.

### **Fact Sheets:**

#### *Minnesota*

- Travel and Tourism in Minnesota generates \$9.2 billion in gross sales and state and local tax revenues of \$1.0 billion annually according to Travel Industry Association of America.
- From 1993 to 2003, employment in Leisure and Hospitality sectors in Minnesota increased by 33,300, and is projected to add more than 46,000 jobs between 2002 and 2012, a growth rate of 19%.

#### *Northeast Minnesota*

- According to the Office of Management and Budget Services at the Minnesota Department of Natural Resources, annual spending in the state parks located in the northeastern part of the state constitute \$68,590,000 of the total statewide spending of \$217,941,000. This is due mostly to the \$60,281,000 of visitor trip spending.
- The same source also reports the economic impact of the total annual spending associated with the Minnesota state park system including visitor, operations, and capital budget spending. In the northeast region, a total annual spending amount of approximately \$69 million generates a total output of \$74 million. The value added effect equals \$47 million. The total direct and indirect income generated is \$42 million and a total of 848 typical and induced jobs are created in the region.

- Northeast Minnesota has the highest percentage park-region's spending from tourists in the state equal to 89%. This region also has the highest percentage of park-region's park use from tourists, which is equal to 81%.
- According to the 2001 MN State Park Visitor Survey Summary, learning-related activities are a staple of the park visit, with 73 percent of all park visitors participating in one or more of these activities.
- Of the information and interpretation items, informational brochures/maps are judged by nearly half of visitors as "very important" to an enjoyable park visit.

*Cook, Lake, and St. Louis Counties:*

- Tourism related sectors employed 7880 people, paid \$287,296,012 in Total Wages and have a total of 202 establishments in the Educational Services Sector (NAICS 611).
- Tourism related sectors employed 1006 people, paid \$412,326,857 in Total Wages and have a total of 127 establishments in Performing Arts and Spectator Sports (NAICS 711) and Museums, Parks, Historical Sites Sector (NAICS 712).
- Tourism related sectors employed 1599 people, paid \$24,129,846 in Total Wages and have a total of 200 establishments in Membership Organizations and Association (NAICS 813).
- Fifty-seven % of the total establishments in Northeast Minnesota comprise the tourism related sectors of Lodging, Food and Drink, Entertainment and Recreation, Leisure and Hospitality Sectors.
- Tourism related sectors employed 64% of the total full time and part time jobs in Northeast Minnesota in Lodging, Food and Drink, Entertainment and Recreation, Leisure and Hospitality Sectors
- Tourism related sectors paid more than 67% of the total wages paid in Lodging, Food and Drink, Entertainment and Recreation, Leisure and Hospitality Sectors in Northeast Minnesota.

**Impact Measures:** There are two economic effects from the interpretive centers. The first effect is from the actual centers' operations: this includes employees and purchases or spending to operate the facilities. The 2003 IMPLAN model reveals that this multiplier is approximately 1.8. However, this multiplier is lowered to 1.4 when non-paid volunteers are taken into account in the study area; note that many of the interpretative centers are staffed with volunteers.

The second effect is the tourist effect of group members staying in the region and spending dollars on other attractions or activities. Tourists contribute to sales, profits, jobs, tax revenues, and income in an area. The activities of the interpretive centers can be considered part of the tourism impact as they generate economic impact by adding to expenditure in the lodging, restaurants, transportation, amusements, and retail trade sectors. The multiplier for this effect is about 1.5, which is consistent with other industry multipliers.

**ShoreLink details:** ShoreLink data provided a list of tourism related entities, which were coded for the purpose of tracking the economic activity by industry sectors. Note sector 712 represents a majority of firms.

<b>ShoreLink Firms by Sector</b>		
NAICS	Sector Definition data	Number of firms in
3221	Pulp, Paper, and Paperboard Mills	4
339	Miscellaneous Manufacturing	1
4872	Scenic and Sightseeing Transportation, Water	2
561	Administrative and Supports Services, Convention and Visitors Bureaus	1
6116	Educational Services. Fine Arts Schools. Educational Support Services. Technical and Trade Schools. All Other Miscellaneous Schools and Instruction Excluding Academic Schools and Colleges	3
<b>7121</b>	<b>Museums, Historical Sites, and Similar Institutions. Zoos and Botanical Gardens, Nature Parks.</b>	<b>17</b>
721	Accommodation	1
722	Food Services and Drinking Places	1
713	Fitness and Recreational Sports Centers. All Other Amusement and Recreation Industries	1

*Source: BBER; ShoreLink; Sugarloaf Interpretive Center Association; U.S. Census Bureau North American Industry Classification System (NAICS)*

**Conclusion:** Visitors to the interpretive centers of the State, Region, and North Shore counties have indicated that the learning-related activities offered by the short list of entities in this study are considered to be very important by most visitors and tourists.

The activity associated with the operation of the interpretive centers themselves includes the estimated economic multipliers of 1.4, meaning for every job or dollar generated directly by employment or output of the center, another 0.4 job or \$0.40 is created in the surrounding economy.

Also, among tourists staying in the region and spending dollars on attractions or ‘hospitality’ activities, a multiplier of 1.5 can be used, meaning that for every job or dollar directly associated with tourism spending in the region, another 0.5 job or \$0.50 is created in the economy as an indirect impact of these tourist expenditures.

## **2) Project Overview:**

The UMD Bureau of Business and Economic Research (BBER) was asked to study and estimate the economic impact of interpretation centers along Minnesota's North Shore. The economic model proposed was IMPLAN. The results are presented in a written report.

### **DELIVERABLES**

1. Estimate the employment, output and value added effects of interpretation centers along the North Shore.
2. A fact sheet and most recent figures from sources such as Explore Minnesota and Minnesota Office of Tourism illustrating relevant tourism data in Minnesota.
3. A final written report that will present the findings and analysis.

The BBER worked closely with the Sugarloaf Interpretive Center Association and the Minnesota Office of Tourism in determining key assumptions. Inputs required for this model included interpretive visitors to the North Shore per year, and average visitor spending per year. The Sugarloaf Interpretive Center Association determined which Centers would be included in the study and was asked to assist in obtaining visitor data for the Centers.

Study area included the North Shore of Lake Superior, a 154 mile stretch that includes the counties of St. Louis, Lake, and Cook.

## Study Area

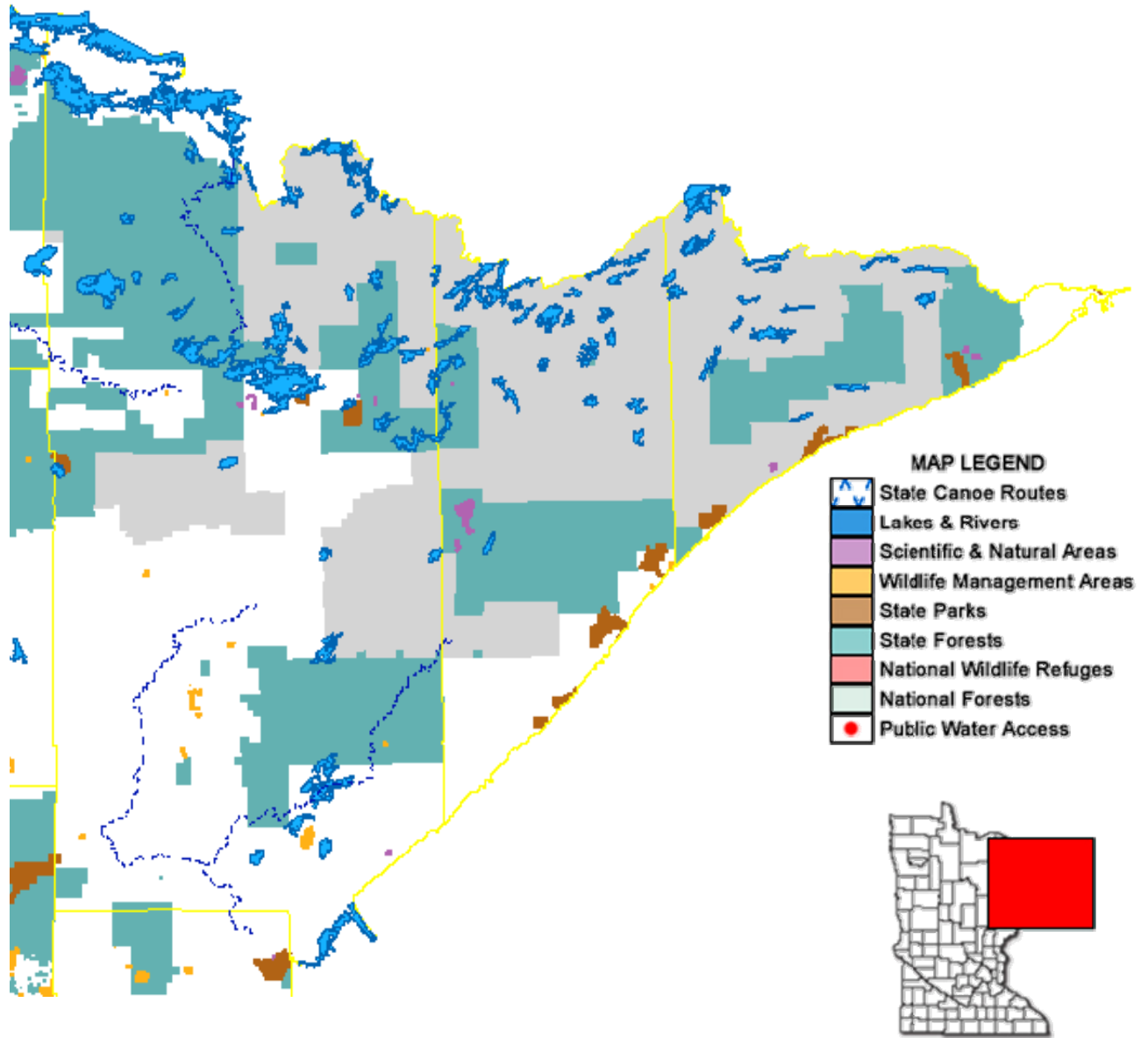


Figure 1: Cook, Lake and St. Louis Counties. Source: Minnesota Department of Natural Resources, Compass map; <http://www.dnr.state.mn.us/maps/compass.htm>.



## **Data Sources**

Explore Minnesota/Minnesota Department of Tourism

IMPLAN data and software, Minnesota IMPLAN Group, Inc.

Minnesota Department of Employment and Economic Development

Minnesota Department of Natural Resources

Minnesota Department of Revenue

Minnesota Sea Grant

Reference USA (Reference USA states that information is "compiled from hundreds annual reports, Chamber of Commerce and industry directories, business magazines and newspapers, telephone directories, SEC and government data, and many other sources." Reference USA claims to "call all of the 12 million businesses each year to validate and enhance the database.")

ShoreLink and Sugarloaf Interpretive Center Association (ShoreLink is a network of groups interpreting the cultural and natural resources of Minnesota's North Shore of Lake Superior.)

Travel Industry Association of America

University of Minnesota Tourism Center

### 3) Tourism Fact Sheets

BBER looked at secondary sources of information for facts about tourism in Minnesota, Northeast Minnesota, the three counties of the study area, and ShoreLink data. The focus of these fact sheets is to shed light on the activities of the interpretive centers. For a more comprehensive treatment of the overall tourism, hospitality, education and recreation sectors involved please see the references and www links provided at the end of this report.

The following look at tourism in the State of Minnesota includes recent data on Employment; Typical MN tourist Expenditures, and a tourism profile, including perceptions about the usefulness of interpretive centers.

#### Tourism in the State of Minnesota

##### Travel & Tourism in Minnesota generates:

Gross sales/ receipts	Annual Impact:	\$9.2 billion
	Per day	\$25 million
State and local tax revenue:	Annual Impact:	1.0 billion

*Source: Travel Industry Association of America, TravelScope; analysis of data completed with REMI model by the Minnesota Office of Tourism*

##### For every \$1 invested in Tourism Marketing in Minnesota

Taxes Generated	\$4.60
Wages Generated	\$20.40
Gross Sales Generated	\$53.00

*Source: Based on 2000 MN Office of Tourism Advertising Expenditures*

##### Employment in Leisure and Hospitality Sectors in Minnesota

Year	No. of Jobs
1993	199,700
1995	204,100
1997	208,600
1999	216,700
2001	226,800
2002	228,900
2003	233,000

*Source: U.S. Dept. of Labor, data based on NAICS codes.*

##### Top Activities for Travelers in Minnesota

Scenic Touring	46%
Visiting State/ National Parks	25%

Visiting historical sites

15%

Source:

Also note

1. The leisure and hospitality industry is projected to add more than 46,000 jobs between 2002 and 2012, a growth rate of 19%.
2. This projected growth in leisure and hospitality jobs (19%) is comparable to the job growth projected for the construction and information industries, and exceeds projections for manufacturing (6%), financial activities (12%) and trade, transportations and utilities (13%).
3. Growth in tourism would result in an increase in jobs, tax revenue and expenditures in communities across Minnesota.

Source: Minnesota Office of Tourism (Explore Minnesota)

### How important is this item to making your visit to the park enjoyable?

### How satisfied or dissatisfied are you with this item in the park?

	% responses "very important"		% satisfaction ratings for "very important"			
	%	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
<b>Natural landscape</b>						
Beauty of the park	81	73	24	2	1	0
A natural setting for the park	79	74	23	2	1	0
Lakes and rivers in the park	69	63	30	4	2	0
Staffing and maintenance						
Cleanliness of grounds and facilities	79	61	34	4	1	1
Well protected natural resources	73	60	34	5	2	0
Lack of disturbances by other users	61	45	44		2	1
Helpfulness of park staff	58	70	26	4	1	0
Security provided by park staff and other security personnel	48	54	34	12	1	0
<b>Recreation opportunities</b>						
Trails in the park	69	55	40	3	2	1
Water recreation opportunities (fishing, boating, swimming)	42	51	37	8	3	1
Good facilities in the picnic grounds	42	55	37	6	3	0
Safe places to swim	42	45	35	14	3	3
<b>Information and interpretation</b>						
Informational brochure/maps provided	47	56	35	6	2	1
Visitor center	38	70	24	5	1	0
Interpretive program	16	42	39	14	3	2
<b>Camping (camper responses only)</b>						
Quality of the campground	85	55	39	4	1	0
Good facilities in campground	76	53	38	7	2	1

Secluded campsites	53	43	35	12	7	2
Campground near lake or river	49	59	29	7	4	1

*Source: 2001 Minnesota State Park Visitor Survey Summary Report, Minnesota Department of Natural Resources, Office of Management and Budget Services*

Also note (from *Visitor Survey Summary*, as above):

- Learning-related activities are a staple of the park visit, with 73 percent of all park visitors participating in one or more of these activities.
- Of the information and interpretation items, informational brochures/maps are judged by nearly half of visitors as “very important” to an enjoyable park visit.

### **Statewide Effects of All Spending on Value Added (Visitor, Operations and Capital Budget)**

Economic Sector	Direct + Indirect %	Induced %	Total %
Agriculture, Forestry and Fishing	1	1	1
Mining	0	0	0
Construction	3	2	2
Manufacturing	5	4	5
Transportation, Communications and Utilities	4	7	5
Wholesale Trade	7	7	7
Retail Trade	27	20	25
Finance, Insurance and Real Estate Services	6	28	10
Government (payroll)	33	31	33
	16	0	13
<b>Total percent</b>	<b>100</b>	<b>100</b>	<b>100</b>
<i>Total amount</i>	<i>\$152.1 million</i>	<i>\$34.9 million</i>	<i>\$187.0 million</i>

*Source:: 2001 Minnesota State Park Visitor Survey Summary Report, Minnesota Department of Natural Resources, Office of Management and Budget Services*

### **Tourism in the Northeast Region of the State of Minnesota**

Economic Effects of Annual Spending Associated with the Minnesota State Park System:  
Park Visitor, Operations, and Capital Budget Spending  
(dollars in millions for 2001)

*Total economic effects of spending (direct, indirect and induced)*

Location of effects	Category	Spending Amount	Output (business sales)	Value Added	Total Income	"Typical" MN Jobs
STATEWIDE	Spending total	\$218	\$300	\$187	\$169	\$3,380
	-Visitor Spending	\$178	\$240	\$141	\$125	\$2,505
	<i>Local visitors (Minnesotans)</i>	\$144	\$193	\$113	\$100	2001
	<i>Tourists (non-Minnesotans)</i>	\$34	\$47	\$28	\$25	503
	- Operations Spending	\$37	\$56	\$43	\$42	833
	- Capital Spending	\$3	\$4	\$2	\$2	\$43
<b><u>REGIONS</u></b>						
NORTHWEST	Spending total	\$36	\$39	\$25	\$22	449
<b>NORTHEAST</b>	<b>Spending total</b>	<b>\$69</b>	<b>\$74</b>	<b>\$47</b>	<b>\$42</b>	<b>848</b>
CENTRAL	Spending total	\$27	\$31	\$20	\$18	362
SOUTHWEST	Spending total	\$28	\$29	\$17	\$16	312
SOUTHEAST	Spending total	\$19	\$20	\$13	\$12	234
METRO	Spending total	\$26	\$32	\$21	\$19	389

*Source: Contributions of the Minnesota State Park System to State and Regional Economies, Minnesota Department of Natural Resources, Office of Management and Budget Services*

**Annual Spending Associated with the Minnesota State Park System (in thousands)**

Location of spending	Total	Visitor trip spending*	Operations spending**	Capital budget spending***
STATEWIDE	\$217,941	\$177,759	\$37,190	\$2,992
Northwest	\$35,809	\$27,266	\$7,562	\$981
<b>Northeast</b>	<b>\$68,590</b>	<b>\$60,281</b>	<b>\$7,756</b>	<b>\$553</b>
Central	\$26,846	\$21,303	\$5,112	\$431
Southwest	\$27,617	\$22,790	\$4,504	\$322
Southeast	\$18,550	\$14,645	\$3,622	\$283

\* Excludes potential double counting with operations spending; excludes payments to government for entrance fees, registrations and licenses; the state park's portions of these are represented in the operations budget.

NOTE: Regional visitor spending amounts do not total to the statewide amount, because "at-home" trip-related spending is only included if the residence of the visitor and location of the park visited are in the same region.

\*\* Excludes pass-through amounts to local government; includes central office spending in the Metro Region; includes park-related maintenance spending through the budgets of other MN DNR units; includes intra- and inter-government transfers (e.g., indirect costs).

\*\*\* Includes new construction, facility rehabilitation, and engineering/architectural services (both contracted and in-house services).

*Source: Contributions of the Minnesota State Park System to State and Regional Economies, Minnesota Department of Natural Resources, Office of Management and Budget Services*

## MN State Park Annual Trip-Related Spending and Use from Tourists\*

(excludes payments to MN State Parks and any other government agency)

Park Region	Percent of park-region's spending from tourists	Percent of park-region's park use from tourists
Northwest (1)	77	67
<b>Northeast (2)</b>	<b>89</b>	<b>81</b>
Central (3)	74	69
Southwest (4)	48	37
Southeast (5)	50	42
Metro (6)	21	13
Statewide	19	16

\* Tourists live outside the region of the park they visited. Only non-Minnesotans are tourists at the statewide scale.

Source: *Contributions of the Minnesota State Park System to State and Regional Economies*, Minnesota Department of Natural Resources, Office of Management and Budget Services

## Tourism in the three counties of the study area: Cook, Lake, and St. Louis

The economic impact of the North Shore's interpretive centers, as identified by firms listed on the Shore Link database, for the counties included in this study, are related to the performance of the relevant industry sectors as a whole. The Minnesota Department of Employment and Economic Development reports the following employment, wage, and establishment count for the study area for the related NAICS sectors, as follows:

### Cook, Lake and St. Louis County Employment, Wages, Establishments for Interpretive Center Related NAICS 611, 711 and 813 for Year 2004

Source: MN DEED QCEW 2004

County	NAICS	NAICS title	# Establishments	Average Employment	Total Wages	Average Wkly Wage
Cook	611	Educational Services	8	115	\$3,997,690	\$669
Lake	611	Educational Services	na	na	na	na
St. Louis	611	Educational Services	194	7765	\$283,298,322	\$702
			202	7880	\$287,296,012	
Cook	711	Performing Arts and Spectator Sports	na	na	na	na
Lake	711	Performing Arts and Spectator Sports	na	na	na	na
St. Louis	711	Performing Arts and Spectator Sports	18	181	\$1,618,199	\$172
St. Louis	712	Museums, Parks and Historical Sites	15	106	\$1,769,277	\$322
St. Louis	713	Amusement, Gambling & Recreation	94	719	\$8,939,381	\$239

		Ind				
			127	1006	\$12,326,857	
Cook	813	Membership Organizations & Associations	8	33	\$303,457	\$175
Lake Saint Louis	813	Membership Organizations & Associations	10	71	\$458,571	\$124
			182	1495	\$23,367,818	\$301
			200	1599	\$24,129,846	

In 2004, for the study area of Lake, Cook and St. Louis Counties, employment and wages totals for all counties in the selected industries are as follows:

NAICS	Title	Employment	Wages
611	Educational Services	7,880	\$287,296,012
711	Amusement, Gambling & Recreation Ind	1,006	\$12,326,857
813	Membership Organizations & Associations	1,599	\$24,129,846

Further county level information on the 2004 contribution of the tourism-related leisure and hospitality industry sectors to the economy of the County, the Region and the State are shown in the following table from the Minnesota Department of Employment and Economic Development. NAICS codes for these industries include: 721, 722, and 71.

Private Sector Jobs and Wages for Minnesota's Leisure and Hospitality Industry, 2004																
Leisure and Hospitality Industry Sectors Leisure and Hospitality Total and Total for All Industries for Minnesota, Northeast Region, Cook, Lake, and St. Louis Counties																
Area	Establishments					Employment (Full- and Part-Time Jobs)					Wages					Tourism Region
	Lodg	FdDrnk	EntRec	L & H*	Total	Lodging	FoodDrnk	EntRec	L & H*	Total	Lodging	Food Serv/Drink	Arts Ent Rec	Leisure & Hosp*	Total	
Minnesota Total	1,465	9,409	2,519	13,393	149,625	26,937	172,779	35,817	235,533	2,229,697	\$450,291,514	\$2,060,023,635	\$861,190,267	\$3,371,505,416	\$90,481,921,066	
Northeast Region	302	841	248	1,388	10,110	3,712	11,224	1,668	17,764	126,717	\$47,939,219	\$109,193,388	\$19,960,611	\$188,516,822	\$3,918,314,168	NE
Cook County	45	16	7	68	237	610	N	N	993	1,830	\$10,291,861	N	N	\$14,942,739	\$37,822,811	NE
Lake County	32	33	12	76	300	271	432	60	763	3,201	\$3,406,839	\$4,212,562	\$1,001,298	\$8,620,699	\$93,778,294	NE
St. Louis County	127	448	127	702	5,274	1,904	7,169	1,001	10,075	76,609	\$24,396,392	\$70,337,441	\$12,328,669	\$107,062,502	\$2,482,750,831	NE
* Leisure and Hospitality Industry; N - Data withheld to avoid disclosing information about individual businesses																
Notes: 1) Minnesota total does not equal the sum of counties or the sum of regions, due to withheld data at the county level																
2) Data provided for regions represent sums of county data																
3) Abbreviations: Lodg = Accommodations (NAICS 721); FoodDr = Food Services and Drinking Places (NAICS 722); EntRec = Arts, Entertainment, and Recreation (NAICS 71); L & H = Leisure and Hospitality (consisting of NAICS 721, 722 and 71); Total = Total for all industries																
4) To access reports of similar data for various time periods, refer to: <a href="http://www.deed.state.mn.us/mini/tools/qcew.htm">http://www.deed.state.mn.us/mini/tools/qcew.htm</a> for user-friendly data tools for reports of unrefined estimates from the Quarterly Census of Employment and Wages (QCEW); and <a href="http://www.bls.gov/qcew">http://www.bls.gov/qcew</a> for the most current QCEW data, but with less user-friendly data tools and table formats																
Source: Minnesota Department of Employment and Economic Development, using a proprietary data tool 1/12/06 to report data obtained from the U.S. Dept. of Labor, Bureau of Labor Statistics																



As well as jobs and wages, tourism related hospitality sectors contribute Minnesota sales tax to the economy of the State. County level information on the 2004 contribution of these taxes include the following, from NAICS code industries 700, 710, 711, 712, 713, 720, 721, 722.

Annual Minnesota Sales Tax Statistics for Minnesota's Leisure and Hospitality Industry, 2004												
Leisure and Hospitality Total and Total for All Industries for Minnesota, Northeast Region, Cook, Lake, and St. Louis Counties												
Area	Establishments		Gross Sales (\$)		Taxable Sales (\$)		Sales Tax (\$)			Total Tax (\$)		Tourism
	L & H*	Total	L & H*	Total	L & H*	Total	L & H*	Total	L&H % of Total	L & H*	Total	Region
Minnesota Total	16,029	152,679	9,969,370,561	241,337,353,469	8,860,919,908	60,309,541,847	602,326,058	3,985,151,015	15.1%	612,031,309	4,256,004,631	
Northeast Region	1,887	11,736	675,378,556	10,758,395,923	627,849,590	3,596,232,142	42,970,218	237,941,020	18.1%	43,187,452	254,834,007	NE
Cook County	115	377	43,920,240	134,851,932	40,829,292	82,506,261	2,709,783	5,478,758	49.5%	2,719,776	5,581,666	NE
Lake County	94	401	24,754,331	231,347,052	23,469,944	67,901,470	1,564,008	4,528,927	34.5%	1,566,017	6,420,633	NE
St. Louis County	898	5,604	368,533,729	6,390,071,000	343,750,111	2,191,945,128	23,551,822	144,849,792	16.3%	23,679,271	155,227,075	NE
Unspecified location, or masked from county data	14,142	140,943	9,293,992,005	230,578,957,546	8,233,070,318	56,713,309,705	559,355,840	3,747,209,995	14.9%	568,843,857	4,001,170,624	
* Leisure and Hospitality Industry												
Notes: 1) Minnesota total does not equal the sum of counties or the sum of regions, due to withheld data at the county level. In addition, the Minnesota total includes data for establishments located outside of Minnesota and/or having no available Minnesota address												
2) Data provided for regions represent sums of county data												
3) Wherever possible, data included in these reports is consistent with other Minnesota sales tax statistics available online at <a href="http://www.taxes.state.mn.us/taxes/legal_policy/research_reports/content/sales_use_reports.shtml">http://www.taxes.state.mn.us/taxes/legal_policy/research_reports/content/sales_use_reports.shtml</a>												
4) Leisure and Hospitality (L & H) Total is the sum of three-digit NAICS codes 700 through 722: 700=Other Leisure and Hospitality (masked from other industries); 710=Other Arts, Entertainment, and Recreation (masked from 711, 712, and/or 713); 711 Performing Arts, Spectator Sports; 712=Museums, Historical Sites, Zoos, etc.; 713=Amusement, Gambling, And Recreation; 720=Other Accommodation and Food Services (masked from 721 and/or 722); 721=Accommodations; 722=Food Services and Drinking Places												
5) To avoid disclosure for individual businesses, data is not reported (i.e., is masked) for any industry classification with less than four establishments. When this occurs for industries 711, 712, 713, 721 or 722, the masked data is first assigned to industries 710 or 720 in attempts to reach the reporting threshold of at least four establishments, then to industry 700. Industry codes 700, 710 and 720 were utilized to allow more precise reporting for the Leisure and Hospitality industry for counties and tourism regions. Data appearing under industries 700, 710 or 720 for counties or tourism regions have been re-assigned to their respective industries for the Minnesota Total												

## ShoreLink data, related facts

Estimated Employment, Sales, Industry Sector, and Location for Short-List Interpretive Centers in NE MN						
<i>Source: Reference USA</i>						
RefUSA NAME	CITY	ST	EMP SIZE	SALES	NAICS	NAICS DESCRIPTION
Lutsen Resort & Sea Villas	Lutsen	MN	100 to 249	\$2.5 to \$5 Million	72221105	Limited-Service Restaurants
Superior National Lutsen-Golf	Lutsen	MN	20 to 49	\$1 to \$2.5 Million	71391002	Golf Courses & Country Clubs
Lake Superior Maritime Visitor	Duluth	MN	5 to 9	Less Than \$500,000	71212001	Historical Sites
Caribou Highlands Lodge Lutsen	Lutsen	MN	50 to 99	\$2.5 to \$5 Million	72111002	Hotels & Motels, Except Casino Hotels
Finland Historical	Two Harbors	MN	50 to 99	\$5 to \$10 Million	72119909	All Other Traveler Accommodation
Grand Superior Lodge	Two Harbors	MN	50 to 99	\$5 to \$10 Million	72119909	All Other Traveler Accommodation
Grampa Woo Excursions	Beaver Bay	MN	5 to 9	\$500,000 to \$1 Million	48721003	Scenic & Sightseeing Transportation, Water
Superior National Forest Info	Ely	MN	1 to 4	Less Than \$500,000	11531004	Support Activities For Forestry
Stora Enso	Duluth	MN	250 to 499	\$100 to \$500 Million	32212103	Paper, Except Newsprint, Mills
Stora Enso Duluth Paper Mill	Duluth	MN	250 to 499	\$50 to \$100 Million	33999936	All Other Misc Mfg
Stora Enso North America	Duluth	MN	50 to 99	\$20 to \$50 Million	32212103	Paper, Except Newsprint, Mills
Stora Enso North America	Grand Rapids	MN	10 to 19	\$5 to \$10 Million	32211001	Pulp Mills
Vista Fleet	Duluth	MN	50 to 99	\$2.5 to \$5 Million	48721003	Scenic & Sightseeing Transportation, Water
Bay Area Historical Society	Silver Bay	MN	1 to 4	Less Than \$500,000	56159101	Convention & Visitors Bureaus
Bay Area Information Ctr	Beaver Bay	MN	1 to 4	Less Than \$500,000	56159101	Convention & Visitors Bureaus
Cook County Historical Society	Grand Marais	MN	1 to 4		92112007	Legislative Bodies
Cross River Heritage Center-Schroeder Area Historical Society						
Glensheen-Historic Congdon	Duluth	MN	10 to 19	\$1 to \$2.5 Million	71212001	Historical Sites
Gooseberry Falls State Park	Two Harbors	MN	20 to 49	\$2.5 to \$5 Million	71219004	Nature Parks & Other Similar Institutions
Grand Marais Art Colony	Grand Marais	MN	1 to 4		71211004	Museums
Grand Portage Community Ctr	Grand Portage	MN	10 to 19		81331915	Other Social Advocacy Organizations
GRAND Portage Forestry	Grand Portage	MN	1 to 4		92119004	Other General Government Support
Grand Portage Marina	Grand Portage	MN	5 to 9	\$500,000 to \$1 Million	71393007	Marinas
Grand Portage Museum	Grand Portage	MN	1 to 4		71211001	Museums
Grand Portage State Park	Grand Portage	MN	1 to 4	Less Than \$500,000	71219004	Nature Parks & Other Similar Institutions
Great Lakes Aquarium	Duluth	MN	20 to 49	\$2.5 to \$5 Million	56159101	Convention & Visitors Bureaus
Hawk Ridge Bird Observatory						
Hedstrom Lumber Co	Two Harbors	MN	5 to 9	\$1 to \$2.5 Million	11331003	Logging
Hedstrom Lumber Co Inc	Grand Marais	MN	50 to 99	\$10 to \$20 Million	32111302	Sawmills
Heritage Division, Superior National Forest						
Lake County Historical Society	Two Harbors	MN	10 to 19		71211001	Museums
Lake Superior Railroad Museum	Duluth	MN	20 to 49		71211001	Museums
North House Folk School	Grand Marais	MN	5 to 9		61169935	Misc Schools & Instruction
North Shore Commercial Fishing Museum-Tofte Historical Society						
Split Rock Lighthouse	Two Harbors	MN	20 to 49		92112008	Legislative Bodies
Split Rock Lighthouse State	Two Harbors	MN	5 to 9	\$500,000 to \$1 Million	71219004	Nature Parks & Other Similar Institutions
St Louis County Heritage-Arts	Duluth	MN	10 to 19		71211001	Museums
Sugarloaf Interpretive Ctr	Duluth	MN	5 to 9		81341021	Civil & Social Organizations
Sugarloaf Interpretive Ctr	Schroeder	MN	1 to 4		81341021	Civil & Social Organizations
Wolf Ridge Environmental Ctr	Finland	MN	50 to 99		61111010	Elementary & Secondary Schools

### Description of aggregated ShoreLink data

The following list shows a list of sectors aggregated from the ShoreLink detailed data for impact consideration. The secondary impact analyses we tracked attempted to follow NAICS sectors 3221, 339, 4872, 561, 6116, 7121, 721, 722, and 713.

Aggregated NAICS from ShoreLink		
NAICS	Definitions	# firms
3221	Pulp, Paper, and Paperboard Mills	4
339	Miscellaneous Manufacturing	1
4872	Scenic and Sightseeing Transportation, Water	2
561	Administrative and Supports Services, Convention and Visitors Bureaus	1
6116	Educational Services. Fine Arts Schools. Educational Support Services. Technical and Trade Schools. All Other Miscellaneous Schools and Instruction Excluding Academic Schools and Colleges	3
7121	Museums, Historical Sites, and Similar Institutions. Zoos and Botanical Gardens, Nature Parks.	17
721	Accommodation	1
722	Food Services and Drinking Places	1
713	Fitness and Recreational Sports Centers. All Other Amusement and Recreation Industries	1

To better describe the general position in the economy of these specific entities, the database records were groups in aggregated clusters, depending on their NACIS and IMPLAN definitions. Although our input data does not allow us to quantify the impact from these sectors, a description of the activities of a firm involved may illustrate the significance of the sector's involvement in the economy of interpretive centers.

### Interpretive center activity provided by NAICS sectors represented by the short-list Shore Link data:

#### NAICS 3221: Pulp, Paper, and Paperboard Mills and 339 Miscellaneous Manufacturing.

Of the large impact that wood products manufacturing and miscellaneous manufacturing contribute to the economy of the Northeast Minnesota region, including the three counties of the study area, a small part of the contribution might be said to be accountable to the attraction of educational tours and tourist attractions provided.

**Example:** Stora Enso offers public tours of Supercalendered Papers at its Duluth Paper Mill (summer months). The Duluth Paper Mill provides free, guided tours on Mondays, Tuesdays and Fridays, at 9 a.m., 10:30 a.m., 1 p.m. and 3 p.m., throughout the summer. Nearly a thousand visitors tour this mill each year. Guests first view a video and then

walk through the paper mill where they will see the mill's paper machine, supercalenders and winders. The tour takes 45 minutes to an hour. The tour is offered to those who are age 10 and up.

[http://www.storaenso.com/CDAvgn/main/0,,1\\_-6418-14010-,00.html](http://www.storaenso.com/CDAvgn/main/0,,1_-6418-14010-,00.html)

“Each year, thousands of visitors who’ve never been inside a paper mill take a tour at Stora Enso. What do they find? Although some think of papermaking as a ‘smokestack industry,’ when you visit, you’ll find a clean, high-tech manufacturing operation that meets strict environmental standards set by state and federal agencies. Tour visitors see how paper touches their lives and what a complex and interesting process it is! In fact, Stora Enso – along with Harley-Davidson, Louisville Slugger, Anheuser-Busch, and Celestial Seasonings – each has an award-winning factory tour program recognized by the Guest Relations Association. In 2004, the group selected Stora Enso’s Wisconsin Rapids Mill tour for its “Best Experience Facility” award.”

**NAICS 4872: Scenic and Sightseeing Transportation, Water and 561 Administrative and Supports Services, Convention and Visitors Bureaus**

<http://www.grampawoo.com/lake.html>

**Example:** Grampa Woo’s Daily Scenic Cruises. Jump aboard the Grampa Woo on a two hour cruise along Lake Superior’s beautiful North Shore. Take in the scenery of lush green birch forests, crystal clear waters and rugged rock cliffs as the Captain delivers a fascinating interpretation of the Northlands history, wildlife and plant life.

Cruise activities include:

Lake Superior Daily Scenic Cruises -June 24th through Labor Day, Sept. 3<sup>rd</sup>; 2 hour daily cruises depart at noon, lunch available on board. \$4.00 Ticket Cost: Adults \$25 Children \$10 (3 to 12 yrs old); Saturday, Monday, Wednesday - Beaver Bay to Split Rock Lighthouse; Sunday, Tuesday - Beaver Bay to Palisade Head; Thursday, Friday - Two Harbors at Edna G. Dock to Encampment Island (tickets available on board or at Train Depot Museum)

Evening Scenic Cruises -June 20, July 11 & August 8 6:30 - 8:30 pm; Four Course Dinner Cruise -June 24th through Sept. 2nd

3 1/2 hour cruise at 5:00 pm Wednesdays & Saturdays from Beaver Bay, Mile Post 52 Ticket Cost: \$69 per person Reservations Required

4th of July Fireworks Cruise -July 4<sup>th</sup>; the 2006 4th of July fireworks cruise departs from Beaver Bay at 8:00 PM. The cruise includes a buffet dinner. Ticket Cost: \$65 per person Reservations Required, no children under 12

**NAICS 6116: Educational Services, Fine Arts Schools, Educational Support Services, Technical and Trade Schools, All Other Miscellaneous Schools and Instruction Excluding Academic Schools and Colleges.**

**Example.** The Boulder Lake Management Area (BLMA) is a "window" for various audiences to view full-scale, integrated natural resource management occurring in the BLMA using such things as interpretive trails, public programs and formal environmental education activities. The BLMA was conceived in 1988, was formally established in 1991, and contains 8,250 acres of land and water, eighteen miles north of Duluth, Minnesota Directory Map.

The area is cooperatively managed for natural resources by the BLMA "partners": Minnesota Power (a broadly diversified company headquartered in Duluth), the St. Louis County Land Department, and the Minnesota Department of Natural Resources (MDNR). The BLMA encompasses the 3,500 acre Boulder Lake Reservoir, a water-storage reservoir which supports hydroelectric power generation under Federal Energy Regulatory Commission (FERC) License No. 2360.

The BLMA is open to the public without discrimination. Formal environmental education programming, natural resource research and teacher training was begun in 1994 through a cooperative effort among the BLMA partners and the Natural Resources Research Institute (NRRI) and the Department of Education, both of the University of Minnesota-Duluth.

In 1997 MP and the MDNR executed a Memorandum of Understanding for their common interests in providing a cooperative platform for environmental education upon their respective lands within the BLMA. Minnesota Power, Minnesota DNR, St. Louis County Land Department, and Natural Resources Research Institute provide funding for the Environmental Education Program.

**BLMA Setting.** The BLMA contains 4,750 acres of forested land surrounding the 3,500 acre Boulder Lake Reservoir.

Boulder Lake Reservoir is a water storage reservoir used in association with electric power generating dams on the St. Louis River. The reservoir was developed in 1919 by Minnesota Power's parent company, the Great Northern Power Company. The reservoir dam is located on Otter Creek, and raises the water level to merge the natural lakes of Otter Lake, Boulder Lake and Little Boulder Lake as one reservoir.

Formal environmental education focuses on the middle-school to college, post-graduate level students. This focus fills a necessary role in the upper-midwest region, since area

environmental education providers tend to focus on the kindergarten to sixth grade level students.

Public recreation opportunities within the BLMA includes 21 kilometers of hiking/cross-country skiing trails, primitive campsites camping, fishing for walleye, northern pike, and crappie, canoeing, hunting and snowmobiling.

The BLMA daily staff includes: BLMA Project Manager, an employee of Minnesota Power on behalf of the BLMA Partners, whose role is to oversee the entire BLMA program operations, including oversight of legal agreements and contracts, program focus and content, funding, public relations, and public recreation. BLMA Site Manager, BLMA's resident expert ski trail groomer, grounds manager, and facility operator, an MP employee and is stationed out of the Island Lake Reservoir Hideaway Recreation Area Field Office. Graduate Research Assistant who directs the environmental education efforts, which currently includes programs for both students, professionals and the public, as well as conducting research activities within the BLMA.

**Also see this 6116 sector example:** Wolf Ridge Environmental Center. “Fortunately, the (Wolf Ridge) project's ambitions coincided with the Blandin Foundation's \$7.1 million commitment to environmental education in rural Minnesota. Wolf Ridge was one of five Environmental Learning Centers in the State to receive funding. In addition to financial reward, the grant offered an opportunity for the design participants from each project to exchange ideas about sustainable strategies. Construction Cost: \$1.8 million (including design). See

<http://www.develop.csbr.umn.edu/msdg2/MSDG/case/wolfridge/wolfridge.html>

“Second, Wolf Ridge will seek to secure its financial future. We have always been fortunate that strong participation in programs has provided the basic financial support for much of our annual operations. However, Wolf Ridge has very little reserve for emergencies, facilities maintenance, youth and family scholarships, new program initiatives, or staff development and compensation. While we have been able to make ends meet each year, we have not been able to build the short-term reserves or long-term financial strength necessary for an educational institution to survive and even thrive during times of economic downturn.

In addition to strengthening programs, WOLF RIDGE 2010 calls for a concerted effort by the Board and staff to increase Wolf Ridge’s non-program income. This will be accomplished through efforts that support annual operations and operational reserves including new membership initiatives, an annual fund drive, corporate benefactors, and grants supporting operations. It will also be accomplished through development of a standing endowment to provide continuing financial security into the future. Matching

grants from foundations, major gifts of cash, stock, or land, and numerous vehicles of planned giving, including charitable lead trusts, remainder trusts or life insurance, will be important means for growing the Wolf Ridge endowment.” See <http://www.wolf-ridge.org/>

### **NAICS 7121: Museums, Historical Sites, and Similar Institutions, Zoos and Botanical Gardens, Nature Parks.**

**Example:** See for comparison “The Ecocenter as Tourist Attraction: Ely and the International Wolf Center” at <http://www.eduweb.com/schaller/IWC4.html> and note the following measures: The IMPLAN impact study results show an impact multiplier of 2.2 for sector 7121, and average visitor group expenditure to the local economy of \$185. The results of this study are based on a stratified random sample of 862 tourists surveyed in the Ely area during five periods from May 1995 to February 1996. Of the total sample, 445 respondents were visitors to the International Wolf Center, and 417 were Ely tourists who were not visiting the Wolf Center on this vacation.

Data from the survey was used to estimate the economic impact of the IWC. IMPLAN was used to estimate the ripple effects which follow an economic "shock" to the regional economy (in this case, St. Louis and Lake counties), such as have resulted from the opening of the IWC. Estimated economic impacts take three forms: direct effects (e.g., tourists stop for dinner at a downtown restaurant); indirect effects (the restaurant must buy more walleye from local fishermen); and induced effects (a waitress at the restaurant uses her tips to buy mukluks from a local shop).

Note that IMPLAN uses a sectoral model of the economy which does not have a clear category for the IWC. The Wolf Center, then, was placed in a rather broad economic sector which includes museums and zoos as well as other non-profit organizations such as political associations. This sector's diverse nature makes it difficult to be certain how accurately its assumptions about regional sales and purchases reflect those of the IWC itself.

Tourism is clearly a dominant economic and social activity in the Ely area, though competing estimates of the number of tourists to visit Ely annually make it difficult even to approximate its economic impact. The Ely Chamber of Commerce estimates 250,000 visitors a year, while estimates derived from this study range around 160,000.1 (This latter figure, however, does not include cabin owners who spend more than one month per year in the area.) If, as the survey indicates, tourists spends an average of \$110 during their stay, total tourist expenditures range between \$18 million and \$27 million. The IMPLAN input-output model indicates a multiplier of about 2.2 for tourism-related activities. For St. Louis and Lake counties, then, a crude estimate of total regional effects

generated by tourism might range from \$40 to \$60 million.

Furthermore, these tourists do have a notable economic impact. With average group expenditures of \$185, in 1995 they spent an estimated \$655,000 in the Ely area. Another \$70,000 was spent by the 20% of IWC visitors who extended their vacation, usually by only a few hours but in some cases overnight, in order to visit the Wolf Center. Total tourist expenditures which are directly attributable to the presence of the IWC in Ely amount to about \$725,000. While this is only a small fraction of the estimated \$24 million spent by all Ely tourists, the additional effects of these dollars as they ripple through the economy are sizeable. Additional tourist expenditures in restaurants, retail shops and lodging establishments have generated as many as 21 new jobs in the region, primarily in tourist-oriented businesses. Furthermore, the ripple effects of this increased tourism affect other sectors of the regional economy, creating as many as 16 more jobs. The increase in total industrial output in the region amounts to approximately \$1.2 million, indicating a multiplier effect of 2.2 times the initial tourist expenditures.<sup>2</sup>

The IWC's economic impact is not limited to increased tourism expenditures, however. The Wolf Center itself plays a role in the regional economy by hiring employees, purchasing maintenance and heating supplies, and buying goods from local businesses for sale in the gift shop. Total economic impacts from the IWC's operations is about \$1.5 million dollars (twice the IWC's operating budget), and (including jobs at the IWC itself) as many as 29 new jobs. All in all, about \$3 million in annual economic activity and as many as 66 new jobs are associated with the International Wolf Center (Table 1). While most of the new economic activity is concentrated in tourism-related businesses, new jobs are also created in other sectors such as trade and services. All these figures, of course, are estimates, and their accuracy is limited by the assumptions of the IMPLAN model itself and those taken in this analysis.

### **NAICS 721: Accommodation and 722 Food Services and Drinking Places**

**Example:** Resort accommodations such as Caribou Highlands lodging (through the Caribou Highlands Activities Department) are using the interpretive center approach to increase their attraction to tourists and lodge activities currently include programming such as wildlife observation, guided hiking trails, games with northwoods trivia, guided hunts for rocks and minerals. The accommodation and food services and drinking places sector accounts for a large percent of tourism impact in general. For instance, approximately nine percent of the jobs in Minnesota's economy in 2003 were in the leisure and hospitality industry.

### **NAICS 713: Fitness and Recreational Sports Centers. All Other Amusement and Recreation Industries**



**Example:** Superior National Golf uses the location and knowledge about the area to promote its product, for instance on the web-site, the virtual tour suggests golfers can “stand back and enjoy the beauty and take several pictures. It doesn’t get any more beautiful than this.” The site also uses references to the location near Lake Superior, and wind, elevation and other natural features related to the location to promote the course to prospective golfers. The web-site refers visitors to area resources such as the Lutsen / Tofte Tourism Association, Gunflint Trail Association, and Grand Marais Chamber of Commerce to learn more about the area as an attraction for visitors.

### **NAICS 813: Civic, Professional and Similar Organizations.**

**Example:** Programs at Sugarloaf Cove. See <http://www.sugarloafica.org/>. Sugarloaf Interpretive Center Association is offering an increasingly wide variety of programs both at Sugarloaf Cove and around the region. Second Saturday programs bring free interpretive programs to Sugarloaf Cove 12 months a year. North Shore Naturalist Workshops let you study natural history with an expert for a day or a weekend. And school programs link local students with their natural environment. Spring & Summer 2006 Program Calendar includes the following activities:

Sugarloaf "Second Saturday" Program, BIRCH GOODS FROM THE WOODS  
Saturday, MARCH 11, 2006, 10am-12pm. Learn about the many valuable uses of our birch trees. FREE. No registration required.

Sugarloaf "Second Saturday" Program, NORTH SHORE LICHENS with Joe Waleski  
Saturday, April 8, 2006, 10am-12pm

Sugarloaf "Second Saturday" Program, NORTH SHORE WATERFALLS  
Saturday, May 13, 2006, 10am-12pm

Join the Wallingas, authors of a new book on North Shore Waterfalls, in a scenic review of these North Shore gems. FREE. No registration required. Meet at Sugarloaf Cove.

Sugarloaf Saturday Workshop, DIGITAL WILDFLOWER PHOTOGRAPHY with Craig Blacklock, Saturday, June 17, 2006, 8:00am-4:30pm

The North Shore in June is blooming with color. Learn from the renowned photographer how to capture the beauty of wildflowers with your digital camera. Session includes field work at Sugarloaf Cove and computer lab time. Any digital camera may be used, but digital SLR cameras are highly recommended. Tripods required. Hikes of under one mile. \$70 Sugarloaf members; \$80 non-members.

Sugarloaf Saturday Workshop, THE ECOLOGY OF COLOR with Chel Anderson  
Saturday, June 24, 2006, 9:00am-4:30pm

One of our most popular classes. The North Shore is home to a unique range of wildflowers and their habitats. Not just a wildflower identification class, this workshop goes in the way these beautiful species fit into the unique ecology of the Shore.  
\$50 Sugarloaf members; \$60 nonmembers

Sugarloaf Saturday Workshop, WHAT'S THIS ROCK? NORTH SHORE GEOLOGY  
with Jim Miller, Saturday, July 15, 2006, 9:00am-4:30pm

Ever wonder what all those great rocks on the beach are, or where they came from? Jim tells the whole story, through entertaining presentations and fascinating field trips. Sugarloaf Cove is an ideal base for this program, plus field trips will take you up and down the North Shore. Hikes of under one mile. \$100 Sugarloaf members; \$110 nonmembers

Sugarloaf Weekend Workshop, NORTH SHORE WATERFALLS with John Green  
Saturday & Sunday, July 22-23

Join the ultimate North Shore naturalist on an educational tour of these scenic gems. As a geology professor, John's research forms the foundation of what we know about North Shore geology. But he is also a terrific naturalist, who can tell you about the trees, flowers and birds of the Shore. Join John on informative hikes to at least six North shore waterfalls, from the famous to the out-of-the-way, and learn just about everything along the trail. Hikes of up to three miles. \$100 Sugarloaf members; \$110 nonmembers

#### 4) Impact Measures

Impact procedures

Secondary data

Tourism and related activities have a variety of economic impacts. Tourists contribute to sales, profits, jobs, tax revenues, and income in an area. The activities of the interpretive centers can be considered part of the tourism impact as they generate economic impact by adding to expenditure in the same sectors--lodging, restaurants, transportation, amusements, and retail trade. Through secondary effects, tourism affects most sectors of the economy.

The tourism research literature can suggest multipliers for calculating the impact of employment and output. For instance, following a link from the University of Minnesota Tourism Center, we note “The Nebraska Department of Economic Development uses a multiplier of 2.7 to estimate the effects of tourism expenditures throughout the state.” Also note the IMPLAN impact study by University of Minnesota researcher David T. Schaller of the Department of Geography, who estimates based on survey data and his study of the Ely, MN Wolf Center attraction that the IMPLAN impact model results show an output impact multiplier of 2.2 for sector 7121.

Using the multiplier of 2.2, a very general estimate of impact would be that for every dollar spent because of visitor expenditure due to interpretive center/tourism activity, another \$1.20 would be generated in the economy of the county from rounds of spending dependent on the visitor expenditure. For the interpretive centers, on the other hand, this multiplier would be considered high, given the amount of volunteer staffing at the centers.

By the same multiplier application, for every job created in interpretive center/tourism related activity, another 1.2 jobs would be created in the economy. For the industries being studied in this report and for the counties that describe the study area, the measure of the impact of this multiplier effect is dependent on knowing the number of jobs and the amount of output in each industry sector generated directly from the activity whose impact is being measured. The indirect and induced effects of these jobs and this spending can be modeled with this information. For this study these data were not available.

A benchmark model run by the BBER for the three county study area shows basic employment and multipliers for the total NAICS sector 7121 (IMPLAN sector 475) as:

Direct employment .....	16
Employment impact totals .....	26
Employment multiplier .....	1.66
Output multiplier.....	1.82

IMPLAN sector 475 is defined as Museums, Historical Sites, Zoos, and Parks  
NAICS sector 712 is defined as Museums, Historical Sites, and Similar Institutions

Bear in mind that there are two economic effects from the interpretive centers. The first effect is from the actual centers' operations: this includes employees and purchases or spending to operate the facilities. The 2003 IMPLAN model reveals that this multiplier is approximately 1.8. But this multiplier is lowered to 1.4 when non-paid volunteers are taken into account in the study area; note that many of the interpretative centers are staffed with volunteers.

The second effect is the tourist effect of group members staying in the region and spending dollars on other attractions or activities. This multiplier is about 1.5 which is consistent with other industry multipliers.

[Interesting to note: The Wolf Center Study had slightly higher impacts because they assumed less spending leaking from the local economy. The Wolf Center Study also noted that their survey indicated a significant percentage of survey responders were an important factor in making a decision to visit Ely.]

Using "expert judgment" to estimate multipliers for the most closely related NAICS sector activity, BBER considered the multipliers from the IMPLAN model for the three counties, the multipliers described in related research that included surveys and expenditure data modeling in Northeast Minnesota for related activities, and other factors from the secondary data to arrive at an estimated multiplier of 1.5. The rounds of spending associated with employment and output from the centers results in further economic impact. Where a firm in sector 721 directly supports a job in an interpretive center, another half job will be created in the economy, dependent on this activity. Where the economy shows a dollar spent directly related to interpretive center activity, another half dollar will be spent in related secondary activities.

## **Special Considerations**

As noted by Daniel Stynes (see University of Minnesota Tourism Center web-site link), "The income received from tourism by a destination region is largely off-set by corresponding losses in the origin regions, yielding only modest contributions to net social welfare and efficiency." Data from the Minnesota tourism fact sheet show, for instance, that most tourists are traveling within the State, and that the impact of their expenditures may move around the State with them but not change the level of impact for the State's economy. Counties of the North Shore may benefit, however, if visitors choose to travel north instead of west, for instance.

The data needed for a true impact statement include: How much do interpretive center visitors and tourists spend in the area? What portion of sales by local businesses is due to tourism and these visitors? How much income does tourism generate for households and businesses in the area? How many jobs in the area does tourism support? How much tax revenue is generated from tourism? A comprehensive impact assessment will also examine fiscal impacts, as well as social and environmental impacts.

## 5) ShoreLink data

North Shore Interpretive Centers from the ShoreLink database provide a somewhat representative list of entities involved in tourism related activities. As discussed above in this report the impact of tourism related NAICS coded industries and IMPLAN coded industries provides a link to the impact of all industries included in these sectors. In some cases the entities were known to be participating in certain sector definitions. For other entities this information was not available. Note below the attempt to code as many of these entities as possible for the purpose of tracking their relation to the economic activity of appropriate industry sector:

### Bay Area Historical Society

*NAICS 561591: Convention and Visitors Bureaus*

*IMPLAN 456: Travel arrangement and reservation services*

This U.S. industry comprises establishments primarily engaged in marketing and promoting communities and facilities to businesses and leisure travelers through a range of activities, such as assisting organizations in locating meeting and convention sites; providing travel information on area attractions, lodging accommodations, restaurants; providing maps; and organizing group tours of local historical, recreational, and cultural attractions.

### Beargrease Sled Dog Marathon

*NAICS 711219: Other Spectator Sports*

*IMPLAN 472: Spectator sports*

This U.S. industry comprises (1) independent athletes, such as professional or semiprofessional golfers, boxers, and race car drivers, primarily engaged in participating in live sporting or racing events before a paying audience; (2) owners of racing participants, such as cars, dogs, and horses, primarily engaged in entering them in racing events or other spectator events; and (3) establishments, such as sports trainers, primarily engaged in providing specialized services required to support participants in sports events or competitions.

### Birch Grove Foundation

*NAICS not found*

*IMPLAN not found*

### Boulder Lake Environmental Learning Center

*NAICS 611699: All Other Miscellaneous Schools and Instruction*

*IMPLAN 463: Other educational services*

This U.S. industry comprises establishments primarily engaged in offering instruction (except business, computer, management, technical, trade, fine arts, athletic, language instruction, tutoring, and

automobile driving instruction). Also excluded from this industry are academic schools, colleges, and universities.

Cascade River State Park

*NAICS 712190: Nature Parks and Other Similar Institutions*

*IMPLAN 475: Museums, historical sites, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

*NAICS 721211: RV (Recreational Vehicle) Parks and Campgrounds*

*IMPLAN 480: Other accommodations*

This U.S. industry comprises establishments primarily engaged in operating sites to accommodate campers and their equipment, including tents, tent trailers, travel trailers, and RVs (recreational vehicles). These establishments may provide access to facilities, such as washrooms, laundry rooms, recreation halls and playgrounds, stores, and snack bars.

Cook County Community Center

*NAICS 711310: Promoters of Performing Arts, Sports, and Similar Events with Facilities*

*IMPLAN 474: Promoters of performing arts and sports and agents for public figures*

This industry comprises establishments primarily engaged in (1) organizing, promoting, and/or managing live performing arts productions, sports events, and similar events, such as state fairs, county fairs, agricultural fairs, concerts, and festivals, held in facilities that they manage and operate and/or (2) managing and providing the staff to operate arenas, stadiums, theaters, or other related facilities for rent to other promoters.

Cook County Historical Society

*NAICS 712110: Museums*

*IMPLAN 475: Museums, historical sites, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of objects of historical, cultural, and/or educational value.

*NAICS 813319: Other Social Advocacy Organizations*

*IMPLAN 492: Grantmaking and giving and social advocacy organizations*

This U.S. industry comprises establishments primarily engaged in social advocacy (except human rights and environmental protection, conservation, and wildlife preservation). Establishments in this industry address issues, such as peace and international understanding; community action (excluding civic organizations); or advancing social causes, such as firearms safety, drunk driving prevention, drug abuse awareness. These organizations may solicit contributions and offer memberships to support these causes.

Cook County Soil and Water Conservation District

*NAICS 924110: Administration of Air and Water Resource and Solid Waste Management Programs*

*IMPLAN*

This industry comprises government establishments primarily engaged in one or more of the following: (1) the administration, regulation, and enforcement of air and water resource programs; (2) the administration and regulation of solid waste management programs; (3) the administration and regulation of water and air pollution control and prevention programs; (4) the administration and regulation of flood control programs; (5) the administration and regulation of drainage development and water resource consumption programs; (6) the administration and regulation of toxic waste removal and cleanup programs; and (7) coordination of these activities at intergovernmental levels.

Cook County Water Management Program

*NAICS 924110: Administration of Air and Water Resource and Solid Waste Management Programs*  
*IMPLAN*

This industry comprises government establishments primarily engaged in one or more of the following: (1) the administration, regulation, and enforcement of air and water resource programs; (2) the administration and regulation of solid waste management programs; (3) the administration and regulation of water and air pollution control and prevention programs; (4) the administration and regulation of flood control programs; (5) the administration and regulation of drainage development and water resource consumption programs; (6) the administration and regulation of toxic waste removal and cleanup programs; and (7) coordination of these activities at intergovernmental levels.

Cross River Heritage Center-Schroeder Area Historical Society

*NAICS 712110: Museums*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of objects of historical, cultural, and/or educational value.

Glensheen

*NAICS 712120: Historical Sites*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of sites, buildings, forts, or communities that describe events or persons of particular historical interest. Archeological sites, battlefields, historical ships, and pioneer villages are included in this industry.

*NAICS 712110: Museums*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of objects of historical, cultural, and/or educational value.

*NAICS 561591: Convention and Visitors Bureaus*

*IMPLAN 456: travel arrangement and reservation services*

This U.S. industry comprises establishments primarily engaged in marketing and promoting communities and facilities to businesses and leisure travelers through a range of activities, such as assisting organizations in locating meeting and convention sites; providing travel information on area attractions, lodging accommodations, restaurants; providing maps; and organizing group tours of local historical, recreational, and cultural attractions.

Gooseberry Falls State Park

*NAICS 712190: Nature Parks and Other Similar Institutions*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

*NAICS 721211: RV (Recreational Vehicle) Parks and Campgrounds*

*IMPLAN 480: Other accommodations*

This U.S. industry comprises establishments primarily engaged in operating sites to accommodate campers and their equipment, including tents, tent trailers, travel trailers, and RVs (recreational vehicles). These establishments may provide access to facilities, such as washrooms, laundry rooms, recreation halls and playgrounds, stores, and snack bars.

Grand Marais Art Colony

*NAICS 611610: Fine Arts Schools*

*IMPLAN 463: Other educational services*

This industry comprises establishments primarily engaged in offering instruction in the arts, including dance, art, drama, and music.

Grand Marais Fisherman's Picnic-Lions' Club

*NAICS not found*

*IMPLAN*

Grand Marais Playhouse

*NAICS 711110: Theater Companies and Dinner Theaters*

*IMPLAN 471: Performing arts companies*

This industry comprises (1) companies, groups, or theaters primarily engaged in producing the following live theatrical presentations: musicals; operas; plays; and comedy, improvisational, mime, and puppet shows and (2) establishments, commonly known as dinner theaters, engaged in producing live theatrical productions and in providing food and beverages for consumption on the premises. Theater groups or companies may or may not operate their own theater or other facility for staging their shows.

Grand Portage National Monument

*NAICS 712120: Historical Sites*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of sites, buildings, forts, or communities that describe events or persons of particular historical interest. Archeological sites, battlefields, historical ships, and pioneer villages are included in this industry.

Grand Portage State Park

*NAICS 712190: Nature Parks and Other Similar Institutions*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

Grand Superior Lodge Activities Dept

*NAICS: not found*

Great Lakes Aquarium

*NAICS 712130: Zoos and Botanical Gardens*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of live plant and animal life displays.

Great Lakes School of Log Building & Stonemasonry

*NAIC: 611519: Other Technical and Trade Schools*

*IMPLAN 463: Other educational services*

This U.S. industry comprises establishments primarily engaged in offering job or career vocational or technical courses (except cosmetology and barber training, aviation and flight training, and apprenticeship training). The curriculums offered by these schools are highly structured and specialized and lead to job-specific certification.



Gunflint Ranger District, Superior National Forest

*NAICS 115310: Support Activities for Forestry*

*IMPLAN 18: Agriculture and forestry support activities*

This industry comprises establishments primarily engaged in performing particular support activities related to timber production, wood technology, forestry economics and marketing, and forest protection. These establishments may provide support activities for forestry, such as estimating timber, forest firefighting, forest pest control, and consulting on wood attributes and reforestation.

Hartley Nature Center

*NAICS 712190: Nature Parks and Other Similar Institutions*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

Hawk Ridge Bird Observatory

*NAICS 712190: Nature Parks and Other Similar Institutions*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

Heritage Division, Superior National Forest

*NAICS 712190: Nature Parks and Other Similar Institutions*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

International Wolf Center

*NAICS 813312: Environment, Conservation and Wildlife Organizations*

*IMPLAN 492: Grantmaking and giving and social advocacy organizations*

This U.S. industry comprises establishments primarily engaged in promoting the preservation and protection of the environment and wildlife. Establishments in this industry address issues, such as clean air and water; global warming; conserving and developing natural resources, including land, plant, water, and energy resources; and protecting and preserving wildlife and endangered species. These organizations may solicit contributions and offer memberships to support these causes.

Izaak Walton League of Duluth, McCabe Chapter

*NAICS 813312: Environment, Conservation and Wildlife Organizations*

*IMPLAN 492: Grantmaking and giving and social advocacy organizations*

This U.S. industry comprises establishments primarily engaged in promoting the preservation and protection of the environment and wildlife. Establishments in this industry address issues, such as clean air and water; global warming; conserving and developing natural resources, including land, plant, water, and energy resources; and protecting and preserving wildlife and endangered species. These organizations may solicit contributions and offer memberships to support these causes.

Jay Cooke State Park

*NAICS 712190: Nature Parks and Other Similar Institutions*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

*NAICS 721211: RV (Recreational Vehicle) Parks and Campgrounds*

*IMPLAN 480: Other accommodations*

This U.S. industry comprises establishments primarily engaged in operating sites to accommodate campers and their equipment, including tents, tent trailers, travel trailers, and RVs (recreational vehicles). These establishments may provide access to facilities, such as washrooms, laundry rooms, recreation halls and playgrounds, stores, and snack bars.

Judge Magney State Park

*NAICS 712190: Nature Parks and Other Similar Institutions*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

*NAICS 721211: RV (Recreational Vehicle) Parks and Campgrounds*

*IMPLAN 480: Other accommodations*

This U.S. industry comprises establishments primarily engaged in operating sites to accommodate campers and their equipment, including tents, tent trailers, travel trailers, and RVs (recreational vehicles). These establishments may provide access to facilities, such as washrooms, laundry rooms, recreation halls and playgrounds, stores, and snack bars.

Lake County Historical Society

*NAICS 712110: Museums*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of objects of historical, cultural, and/or educational value.

*NAICS 813319: Other Social Advocacy Organizations*

*IMPLAN 492: Grantmaking and giving and social advocacy organizations*

This U.S. industry comprises establishments primarily engaged in social advocacy (except human rights and environmental protection, conservation, and wildlife preservation). Establishments in this industry address issues, such as peace and international understanding; community action (excluding civic organizations); or advancing social causes, such as firearms safety, drunk driving prevention, drug abuse awareness. These organizations may solicit contributions and offer memberships to support these causes.

Lake Superior Maritime Visitors' Center

*NAICS 712110: Museums*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of objects of historical, cultural, and/or educational value.

Lake Superior Railroad Museum & North Shore Scenic Railroad

*NAICS 712110: Museums*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of objects of historical, cultural, and/or educational value.

Lake Superior Zoo Ed Dept

*NAICS 712130: Zoos and Botanical Gardens*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of live plant and animal life displays.

Marshall W Alworth Planetarium

*NAICS: 712110 Museums*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of objects of historical, cultural, and/or educational value.

MN DNR French River Fish Hatchery

*NAICS 924120: Administration of Conservation Programs*

**IMPLAN**

This industry comprises government establishments primarily engaged in the administration, regulation, supervision and control of land use, including recreational areas; conservation and preservation of natural resources; erosion control; geological survey program administration; weather forecasting program administration; and the administration and protection of publicly and privately owned forest lands. Government establishments responsible for planning, management, regulation and conservation of game, fish, and wildlife populations, including wildlife management areas and field stations; and other administrative matters relating to the protection of fish, game, and wildlife are included in this industry.

*NAICS 712130: Zoos and Botanical Gardens*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of live plant and animal life displays.

MN Extension Service-Cook County

*NAICS 923130: Administration of Human Resource Programs (except Education, Public Health, and Veterans' Affairs Programs)*

**IMPLAN**

This industry comprises government establishments primarily engaged in the planning, administration, and coordination of programs for public assistance, social work, and welfare activities. The administration of Social Security, disability insurance, Medicare, unemployment insurance, and workers' compensation programs are included in this industry.

*NAICS 925120: Administration of Urban Planning and Community and Rural Development*

**IMPLAN**

This industry comprises government establishments primarily engaged in the administration and planning of the development of urban and rural areas. Included in this industry are government zoning boards and commissions.

*NAICS 611710: Educational Support Services*

*IMPLAN 463: Other educational services*

This industry comprises establishments primarily engaged in providing noninstructional services that support educational processes or systems.

MN Pollution Control Agency, Minnesota Lake Superior Beach Monitoring

National Weather Service

Natural Resources Research Institute

NE Minnesota Historical Center  
*NAICS: not found*

North American Butterfly Association, Northern Crescent Chapter

*NAICS 813319: Other Social Advocacy Organizations*

*IMPLAN 492: Grantmaking and giving and social advocacy organizations*

This U.S. industry comprises establishments primarily engaged in social advocacy (except human rights and environmental protection, conservation, and wildlife preservation). Establishments in this industry address issues, such as peace and international understanding; community action (excluding civic organizations); or advancing social causes, such as firearms safety, drunk driving prevention, drug abuse awareness. These organizations may solicit contributions and offer memberships to support these causes.

North House Folk School

*NAICS 611699: All Other Miscellaneous Schools and Instruction*

*IMPLAN 463: Other educational services*

This U.S. industry comprises establishments primarily engaged in offering instruction (except business, computer, management, technical, trade, fine arts, athletic, language instruction, tutoring, and automobile driving instruction). Also excluded from this industry are academic schools, colleges, and universities.

North Shore Commercial Fishing Museum-Tofte Historical Society

*NAICS 712120: Historical Sites*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of sites, buildings, forts, or communities that describe events or persons of particular historical interest. Archeological sites, battlefields, historical ships, and pioneer villages are included in this industry.

North Shore Management Board of Arrowhead Regional Development Council

*NAICS 813910: Business Associations*

*IMPLAN 493: Civic, social, professional and similar organizations*

This industry comprises establishments primarily engaged in promoting the business interests of their members. These establishments may conduct research on new products and services; develop market statistics; sponsor quality and certification standards; lobby public officials; or publish newsletters, books, or periodicals for distribution to their members.

*NAICS 813410: Civic and Social Organizations*

*IMPLAN 493: Civic, social, professional and similar organizations*

This industry comprises establishments primarily engaged in promoting the civic and social interests of their members. Establishments in this industry may operate bars and restaurants for their members.

*NAICS 813990: Other Similar Organizations (except Business, Professional, Labor, and Political Organizations)*

*IMPLAN 493: Civic, social, professional and similar organizations*

This industry comprises establishments (except religious organizations, social advocacy organizations, civic and social organizations, business associations, professional organizations, labor unions, and political organizations) primarily engaged in promoting the interest of their members.

*NAICS 813319: Other Social Advocacy Organizations*

*IMPLAN 492: Grantmaking and giving and social advocacy organizations*

This U.S. industry comprises establishments primarily engaged in social advocacy (except human rights and environmental protection, conservation, and wildlife preservation). Establishments in this industry address issues, such as peace and international understanding; community action (excluding civic organizations); or advancing social causes, such as firearms safety, drunk driving prevention, drug abuse awareness. These organizations may solicit contributions and offer memberships to support these causes.

*NAICS 813219: Other Grantmaking and Giving Services*

*IMPLAN 492: Grantmaking and giving and social advocacy organizations*

This U.S. industry comprises establishments (except voluntary health organizations) primarily engaged in raising funds for a wide range of social welfare activities, such as educational, scientific, cultural, and health.

#### North Shore Music Association

*NAICS 711320: Promoters of Performing Arts, Sports, and Similar Events without Facilities*

*IMPLAN 474: Promoters of performing arts and sports and agents for public figures*

This industry comprises promoters primarily engaged in organizing, promoting, and/or managing live performing arts productions, sports events, and similar events, such as state fairs, county fairs, agricultural fairs, concerts, and festivals, in facilities that are managed and operated by others. Theatrical (except motion picture) booking agencies are included in this industry.

*NAICS 711190: Other Performing Arts Companies*

*IMPLAN 471: Performing arts companies*

This industry comprises companies or groups (except theater companies, dance companies, musical groups, and artists) primarily engaged in producing live theatrical presentations.

*NAICS 813410: Civic and Social Organizations*

*IMPLAN 493: Civic, social, professional and similar organizations*

This industry comprises establishments primarily engaged in promoting the civic and social interests of their members. Establishments in this industry may operate bars and restaurants for their members.

#### Split Rock Lighthouse Historic Site

*NAICS 712120: Historical Sites*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of sites, buildings, forts, or communities that describe events or persons of particular historical interest. Archeological sites, battlefields, historical ships, and pioneer villages are included in this industry.

#### Split Rock Lighthouse State Park

*NAICS 712190: Nature Parks and Other Similar Institutions*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

*NAICS 721211: RV (Recreational Vehicle) Parks and Campgrounds*

*IMPLAN 480: Other accommodations*

This U.S. industry comprises establishments primarily engaged in operating sites to accommodate campers and their equipment, including tents, tent trailers, travel trailers, and RVs (recreational vehicles). These establishments may provide access to facilities, such as washrooms, laundry rooms, recreation halls and playgrounds, stores, and snack bars.

#### St Louis County Heritage & Arts Center

*NAICS 712110: Museums*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of objects of historical, cultural, and/or educational value.

*NAICS 712120: Historical Sites*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of sites, buildings, forts, or communities that describe events or persons of particular historical interest. Archeological sites, battlefields, historical ships, and pioneer villages are included in this industry.

St Louis County Historical Society

*NAICS 712110: Museums*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of objects of historical, cultural, and/or educational value.

*NAICS 712120: Historical Sites*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of sites, buildings, forts, or communities that describe events or persons of particular historical interest. Archeological sites, battlefields, historical ships, and pioneer villages are included in this industry.

St Louis River-River Watch

*NAICS 611710: Educational Support Services*

*IMPLAN 463: Other educational services*

This industry comprises establishments primarily engaged in providing noninstructional services that support educational processes or systems.

Stora Enso Paper Mill Tours

*NAICS 713990: All Other Amusement and Recreation Industries*

*IMPLAN 478: Other amusement, gambling, and recreation industries*

This industry comprises establishments (except amusement parks and arcades; gambling industries; golf courses and country clubs; skiing facilities; marinas; fitness and recreational sports centers; and bowling centers) primarily engaged in providing recreational and amusement services.

Sugarloaf Interpretive Center Association

*NAICS 712110: Museums*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of objects of historical, cultural, and/or educational value.

*NAICS 712120: Historical Sites*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of sites, buildings, forts, or communities that describe events or persons of particular historical interest. Archeological sites, battlefields, historical ships, and pioneer villages are included in this industry.

*NAICS 712190: Nature Parks and Other Similar Institutions*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

Superior National Forest Resort Naturalist Program

*NAICS 712190: Nature Parks and Other Similar Institutions*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

Superior National Forest, HQ

*NAICS 712190: Nature Parks and Other Similar Institutions*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

Temperance River State Park

*NAICS 712190: Nature Parks and Other Similar Institutions*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

*NAICS 924120: Administration of Conservation Programs*

*IMPLAN*

This industry comprises government establishments primarily engaged in the administration, regulation, supervision and control of land use, including recreational areas; conservation and preservation of natural resources; erosion control; geological survey program administration; weather forecasting program administration; and the administration and protection of publicly and privately owned forest lands. Government establishments responsible for planning, management, regulation and conservation of game, fish, and wildlife populations, including wildlife management areas and field stations; and other administrative matters relating to the protection of fish, game, and wildlife are included in this industry.

Tettegouche State Park

*NAICS 712190: Nature Parks and Other Similar Institutions*

*IMPLAN 475: Museums, historical site, zoos, and parks*

This industry comprises establishments primarily engaged in the preservation and exhibition of natural areas or settings.

*NAICS 721211: RV (Recreational Vehicle) Parks and Campgrounds*

*IMPLAN 480: Other accommodations*

This U.S. industry comprises establishments primarily engaged in operating sites to accommodate campers and their equipment, including tents, tent trailers, travel trailers, and RVs (recreational vehicles). These establishments may provide access to facilities, such as washrooms, laundry rooms, recreation halls and playgrounds, stores, and snack bars.

UMD Recreational Sports Outdoor Program

*NAICS 713940: Fitness and Recreational Sports Centers*

*IMPLAN 476: Fitness and recreational sports centers*

This industry comprises establishments primarily engaged in operating fitness and recreational sports facilities featuring exercise and other active physical fitness conditioning or recreational sports activities, such as swimming, skating, or racquet sports.

US EPA MidContinent Ecology Division

*NAICS 924120: Administration of Conservation Programs*

## IMPLAN

This industry comprises government establishments primarily engaged in the administration, regulation, supervision and control of land use, including recreational areas; conservation and preservation of natural resources; erosion control; geological survey program administration; weather forecasting program administration; and the administration and protection of publicly and privately owned forest lands. Government establishments responsible for planning, management, regulation and conservation of game, fish, and wildlife populations, including wildlife management areas and field stations; and other administrative matters relating to the protection of fish, game, and wildlife are included in this industry.

### Western Lake Superior Sanitary District

*NAICS 713990: All Other Amusement and Recreation Industries*

*IMPLAN 478: Other amusement, gambling, and recreation industries*

This industry comprises establishments (except amusement parks and arcades; gambling industries; golf courses and country clubs; skiing facilities; marinas; fitness and recreational sports centers; and bowling centers) primarily engaged in providing recreational and amusement services.

*NAICS 924110: Administration of Air and Water Resource and Solid Waste Management Programs*

## IMPLAN

This industry comprises government establishments primarily engaged in one or more of the following: (1) the administration, regulation, and enforcement of air and water resource programs; (2) the administration and regulation of solid waste management programs; (3) the administration and regulation of water and air pollution control and prevention programs; (4) the administration and regulation of flood control programs; (5) the administration and regulation of drainage development and water resource consumption programs; (6) the administration and regulation of toxic waste removal and cleanup programs; and (7) coordination of these activities at intergovernmental levels.

### Wolf Ridge Environmental Learning Center

*NAICS 611710: Educational Support Services*

*IMPLAN 463: Other educational services*

This industry comprises establishments primarily engaged in providing noninstructional services that support educational processes or systems.

*NAICS 813312: Environment, Conservation and Wildlife Organizations*

*IMPLAN 492: Grantmaking and giving and social advocacy organizations*

This U.S. industry comprises establishments primarily engaged in promoting the preservation and protection of the environment and wildlife. Establishments in this industry address issues, such as clean air and water; global warming; conserving and developing natural resources, including land, plant, water, and energy resources; and protecting and preserving wildlife and endangered species. These organizations may solicit contributions and offer memberships to support these causes.

### WTIP Community Radio

*NAICS 515112: Radio Stations*

*IMPLAN 420: Radio and television broadcasting*

This U.S. industry comprises establishments primarily engaged in broadcasting aural programs by radio to the public. Programming may originate in their own studio, from an affiliated network, or from external sources.



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