

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

**June 2007 – May 2008**

*Prepared for:*

**Explore Minnesota Tourism**  
State of Minnesota



UNIVERSITY OF MINNESOTA



and

**Minnesota Heartland Tourism Association**

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## 1.0 Introduction

This is the second report of the Economic Impact of Traveler Expenditures on the Northcentral/West Region prepared by *Davidson-Peterson Associates*. The research approach employed is designed to capture economic impact data (i.e., economic impact of traveler expenditures on the state of Minnesota) and traveler profile data concurrently. This report covers traveler expenditures made in the Northcentral/West Region during the 12-month period from June 2007 through May 2008. A similar 12-month study was conducted for same period in 2005-2006.

The primary purpose of this study is to measure the economic benefits the Northcentral/West Region residents and governments derive from the dollars spent by travelers in the region across a 12-month time period.

These economic benefits include:

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

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

In addition, the traveler on-site interviews used in the economic impact analysis are presented as a traveler profile in Section 7.0 of this report. For the purposes of the traveler profile analysis, interview responses from the 2007-2008 study period have been combined with interview responses from the 2005-2006 study period.

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

## 2.0 Executive Summary

### 2.1 Introduction

Davidson-Peterson Associates was hired to conduct a year-long study which was a joint project with Explore Minnesota Tourism, the University of Minnesota Tourism Center\* and the Minnesota Arrowhead, Minnesota Heartland and Southern Minnesota Tourism associations and the Metro Tourism Committee. Davidson-Peterson Associates was commissioned to conduct a “bottom-up” analysis of traveler expenditures in Minnesota and their impact on the economy of the state during the period June 2007 through May 2008. (See Appendix A, Sections A through C for details on the “bottom-up” approach.)

The economic impact analysis for June 2007 through May 2008 is based on the following surveys:

- Telephone interviews were conducted with a random sample of accommodations managers in the Northcentral/West Region upon conclusion of each season. A total of 2,044 interviews were completed statewide, 441 of which were completed in this region.
- Self-administered questionnaires were completed by 2,023 Minnesota travelers statewide who were either staying overnight or had traveled at least 50 miles from home on a day trip. These questionnaires were completed during each of the four seasons and in each of the four regions. Please refer to Appendix A: Procedures (Section D.5) for more detailed information on the sampling approach by region.
- A total of 1,000 telephone interviews were conducted with a probability sample of Minnesota households equally divided among the four seasons.

Total estimated traveler expenditures by category of expense were provided to Dr. William Shaffer of Georgia Tech to develop an input-output model based on the Northcentral/West Region’s economy. The input-output model estimated the number of full-time equivalent jobs, wages/salaries/proprietary income, and state and local government revenues supported by traveler expenditures.

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

Additionally, Davidson-Peterson Associates used the self-administered questionnaires conducted among Minnesota travelers in the Northcentral/West Region to provide a traveler profile for that region. For the purposes of the traveler profile analysis, interview responses from the 2007-2008 study period have been combined with interview responses from the 2005-2006 study period. The combined data yield results that are more reliable and representative than the results for either of the two interview periods alone – the effect of roughly doubling the sample size and including traveler interviews at a broader selection of traveler sites.

In total, 1,026 interviews were conducted in the Northcentral/West Region during the two study periods **combined**. Using the findings from the state economic impact study, the sample was balanced across *regions* and *seasons*. The Northcentral/West Region traveler profile results are based on a weighted sample of 884. (See Appendix A, Section F for details on weighting procedures.)

## 2.2 The Findings

In total, travelers in the Northcentral/West Region spent \$2.220 billion in the region. Just over one-quarter of the region's traveler expenditures were spent by travelers staying overnight in hotels/motels/B&Bs. Almost half of total traveler expenditures were spent in the summer season.

The \$2.220 billion spent in the Northcentral/West Region from June 2007 through May 2008 supported 54,500 full-time-equivalent jobs, \$1.025 billion in resident income (wages, salaries and proprietary income), \$277.6 million in state government revenues and \$82.3 million in local government revenues.

The Northcentral/West Region received 7.8 million person-visits during the period June 2007 through May 2008. The majority of person-visits in the Northcentral/West region were by travelers staying overnight (6.8 million or 87%) while the remainder were made by travelers on day trips (1.0 million or 13%). One-third of all visits were by travelers staying in hotels/motels/B&Bs (30%) with a slightly higher proportion staying with friends and relatives (35%). Campgrounds (11%) and resorts (11%) accommodated the balance of overnight person-visits.

Some 237 hotels/motels/B&Bs with 9,317 rooms offered 3.42 million room-nights and sold 2.14 million to guests staying fewer than 30 nights during the period of June 2007 through May 2008.

A total of 532 resorts with 6,973 units made 1.75 million unit-nights available and sold 0.88 million unit-nights to guests staying fewer than 30 nights during the 12-month period.

A total of 319 campgrounds on both public and private lands with 10,539 sites made those sites available for 1.94 million site-nights and sold 0.67 million of those site-nights to guests staying fewer than 30 nights.

Those numbers led to occupancy rates of 63% for hotels/motels/B&Bs, 50% for resorts and 35% for campgrounds.

According to managers' estimates, two out of three guests who stayed in the Northcentral/West Region properties were Minnesota residents – 68% in hotels/motels/B&Bs, 69% in campgrounds, and 76% stayed in resorts.

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

The table on the following page summarizes the industry highlights for the period June 2007 through May 2008.

## 2.3 The Northcentral/West Region Lodging and Campground Industry Highlights

Table 2.3

### The Northcentral/West Region Lodging and Campground Industry Highlights

June 2007 – May 2008

	<u>Hotels/Motels/ B&amp;Bs</u>	<u>Resorts</u>	<u>Campgrounds</u>
Number of properties	237	532	319
Number of rooms/units/sites	9,317	6,973	10,539
Total available room-nights/unit-nights/site-nights (millions)	3.42	1.75	1.94
Total occupied room-nights/unit nights/ site-nights (millions)	2.14	0.88	0.67
Average occupancy rate	63%	50%	35%
Average daily room rate	\$68.55	--	--
Average unit rate	--	\$137.53	--
Average site rate	--	--	\$23.36
<b>MANAGEMENT'S ESTIMATES:</b>			
Average party size	1.87	3.56	2.98
Average length of stay	1.73	3.38	2.42
<b>Guest Origin</b>			
<u>Out of State</u>	<u>32%</u>	<u>24%</u>	<u>31%</u>
U.S.	22%	22%	26%
Canada	10%	2%	6%
Other foreign	1%	*	*
<b>Minnesota</b>	<b>68%</b>	<b>76%</b>	<b>69%</b>
<b>Trip Purpose<sup>1</sup></b>			
Pleasure	54%	77%	N/A
Business	34%	12%	N/A
Meeting/convention	12%	11%	N/A

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

\* Less than 0.5%

<sup>1</sup> These statistics not collected for campers

## 3.0 Estimates of Traveler Expenditures in Minnesota

### 3.1 Summary

Travelers to the Northcentral/West Region during the period of June 2007 through May 2008 spent **\$2.220 billion** in the region.

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

### 3.2 Overall Expenditures

The Northcentral/West Region travelers spent an estimated total of **\$2.2 billion** in the period June 2007 through May 2008.

### 3.3 Estimated Traveler Expenditures By Accommodation Type

More than one-quarter of the total estimated traveler expenditures, \$629.5 million (28%), were spent by travelers staying overnight in the Northcentral/West Region at hotels/motels/B&Bs.

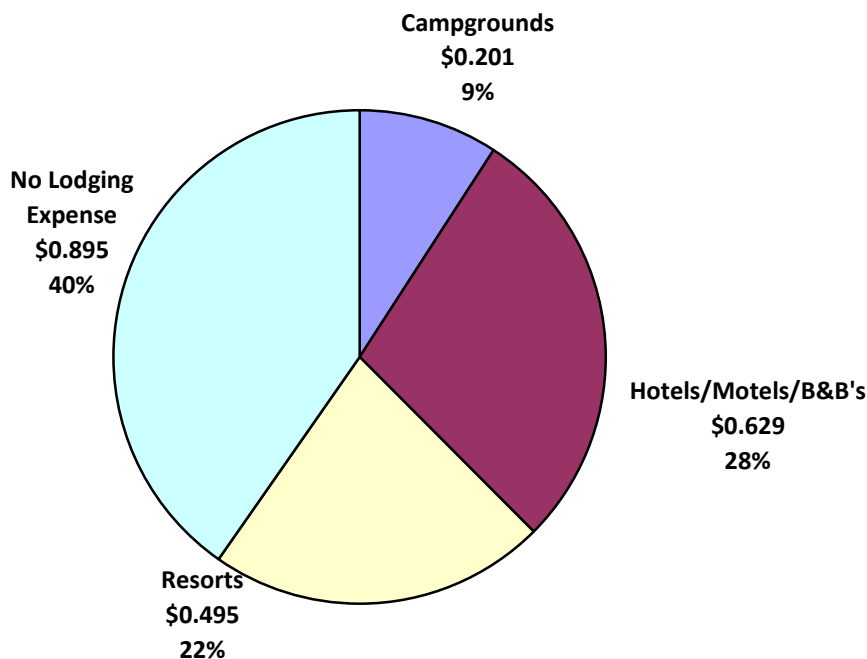
Those staying in resorts in the Northcentral/West Region spent \$495.3 million (22%), and those camping spent \$200.5 million (9%).

Travelers with no lodging expenses (i.e., those staying at homes of family/friends or daytrippers) spent \$894.8 million, or 40% of the Northcentral/West Region's traveler expenditures.

- Travelers who stayed at the homes of family and/or friends spent \$837.10 million (38%) while traveling in the Northcentral/West Region.
- Those visiting just for the day or passing through the Northcentral/West Region spent \$57.72 million (2%).

Figure 3.3

**Estimated Northcentral/West Region Traveler Expenditures**  
**By Accommodation Type**  
**June 2007 – May 2008**  
**(\$ Billions)**



**Total: \$2.220 Billion**

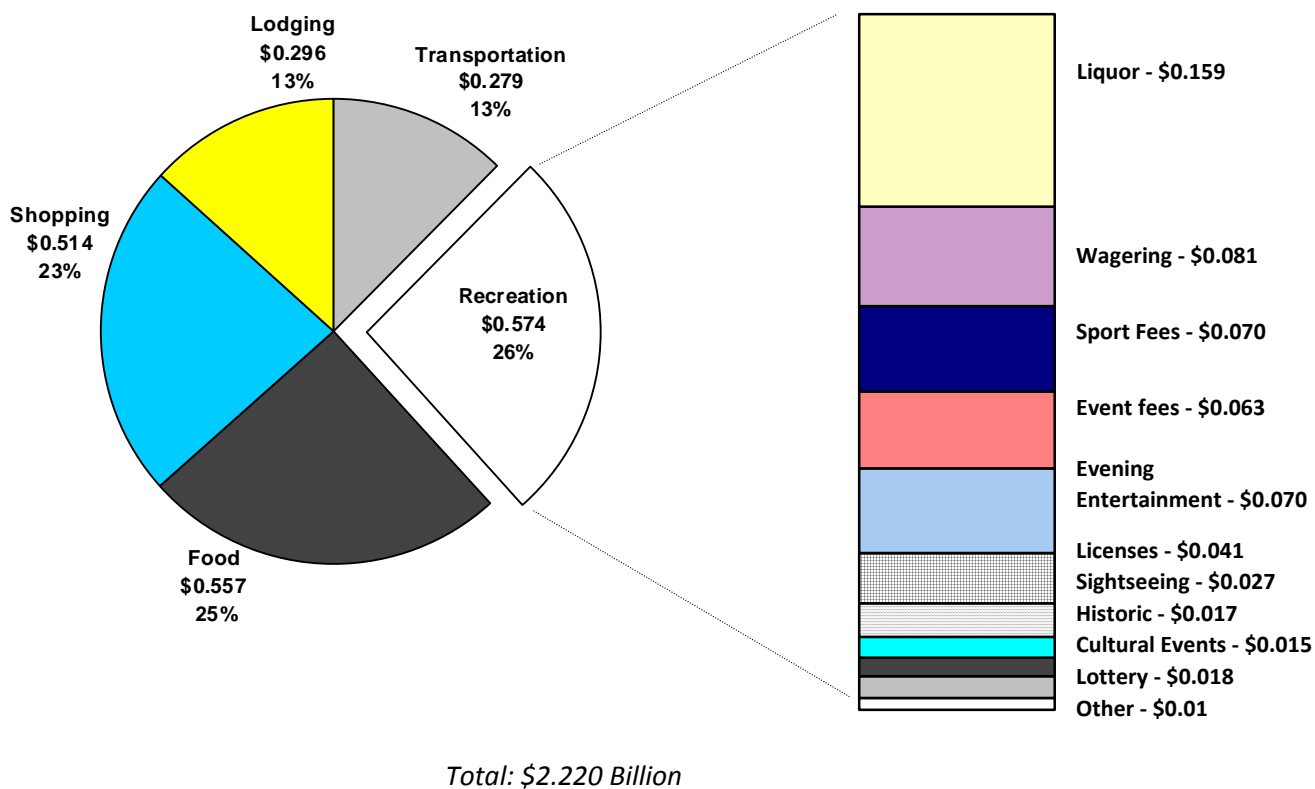
### 3.4 Estimated Traveler Expenditures By Category of Expenditure

Shopping, food and recreation each accounted for about one quarter (23%-26%) of traveler expenditures.

Lodging and transportation expenses represented the remaining quarter (13% each) of the total estimated traveler expenditures (\$296.41 million and \$279.46 million respectively).

Figure 3.4

**Estimated Northcentral/West Region Traveler Expenditures**  
**By Category of Expenditure**  
**June 2007 – May 2008**  
**(\$ Billions)**

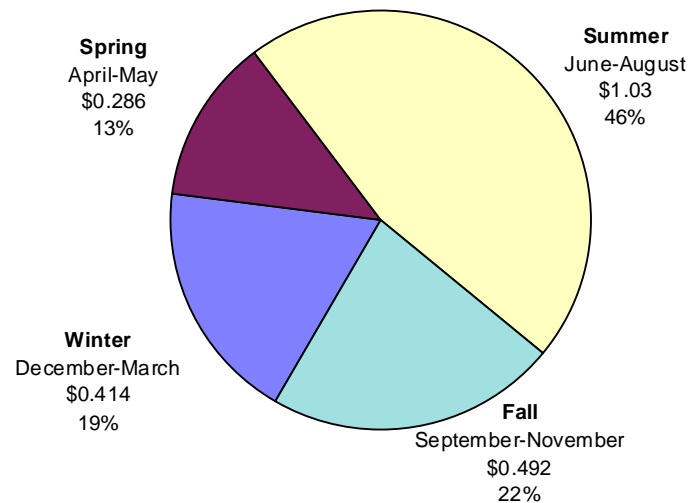


### 3.5 Estimated Traveler Expenditures By Season

Travelers spent \$1.028 billion, or 46% of all traveler expenditures in the summer season (June through August). They spent \$492.24 million, or 22% of all traveler expenditures, in the fall season (September through November) and \$413.59 million, or 19% of total traveler expenditures, in the winter season (December through March). Finally, travelers spent \$286.18 million, or 13% of all traveler expenditures in the spring season (April through May).

Figure 3.5

**Estimated Traveler Expenditures**  
**By Season**  
**June 2007 – May 2008**  
**(\$ Billions)**



**Total: \$2.220 Billion**

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

### 4.1 Summary

The estimated expenditures by travelers in the Northcentral/West Region during the period June 2007 through May 2008 supported 54,500 full-time equivalent jobs and provided residents with wages, salaries and proprietary income of \$1.025 billion. Traveler expenditures also generated \$277.6 million in state government revenues and \$82.3 million in local government revenues.

### 4.2 Direct and Total Impact: An Explanation

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

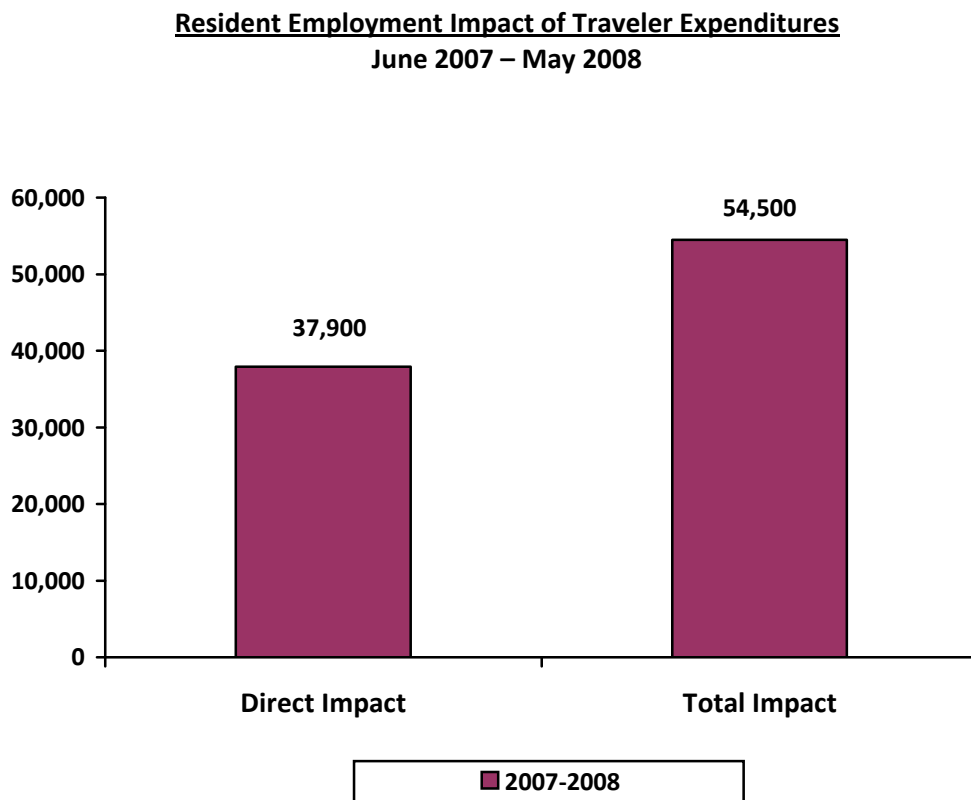
- **Direct** impacts are those economic benefits due directly to the traveler expenditures. For example, when traveler expenditures pay the salary and benefits for a hotel desk clerk, that amount would be considered in the direct impact for both jobs and wages.
- **Total** impacts include all of the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

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

### 4.3 Impact on Jobs for the Northcentral/West Region

During the period June 2007 through May 2008, traveler expenditures in the Northcentral/West Region supported 54,500 full-time equivalent jobs in **total**. About two-thirds of these jobs (70%) were **directly** supported by total estimated traveler expenditures in The Northcentral/West Region (37,900).

Figure 4.3

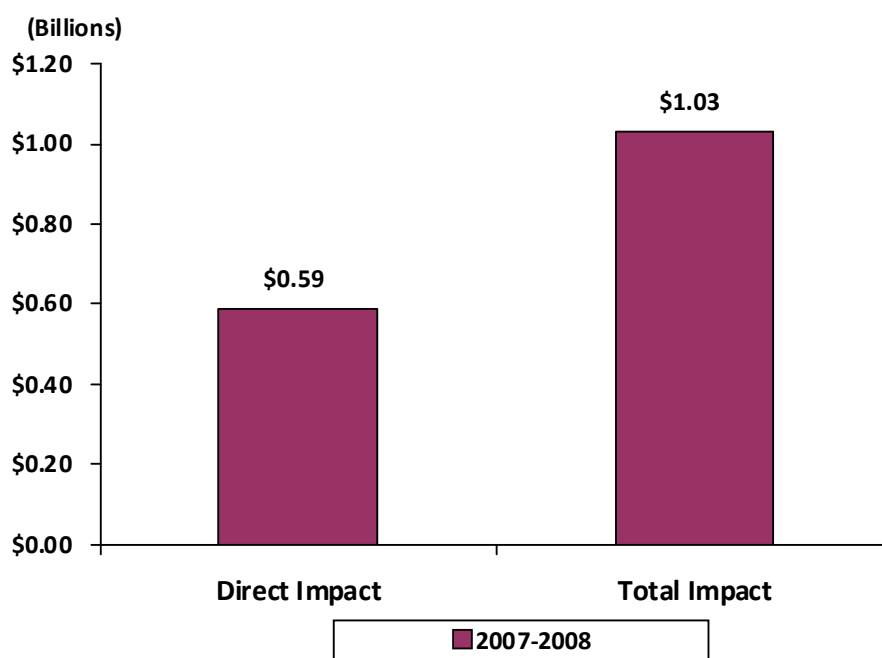


#### 4.4 Impact on Wages, Salaries and Proprietary Income for the Northcentral/West Region

Traveler expenditures in the Northcentral/West Region during the period June 2007 through May 2008 generated \$1.025 billion in resident wages and proprietary income in **total**. More than half of this resident income was **directly** generated by traveler expenditures (\$592.51 million or 57%).

Figure 4.4

##### Resident Income Impact of Estimated Traveler Expenditures June 2007 – May 2008



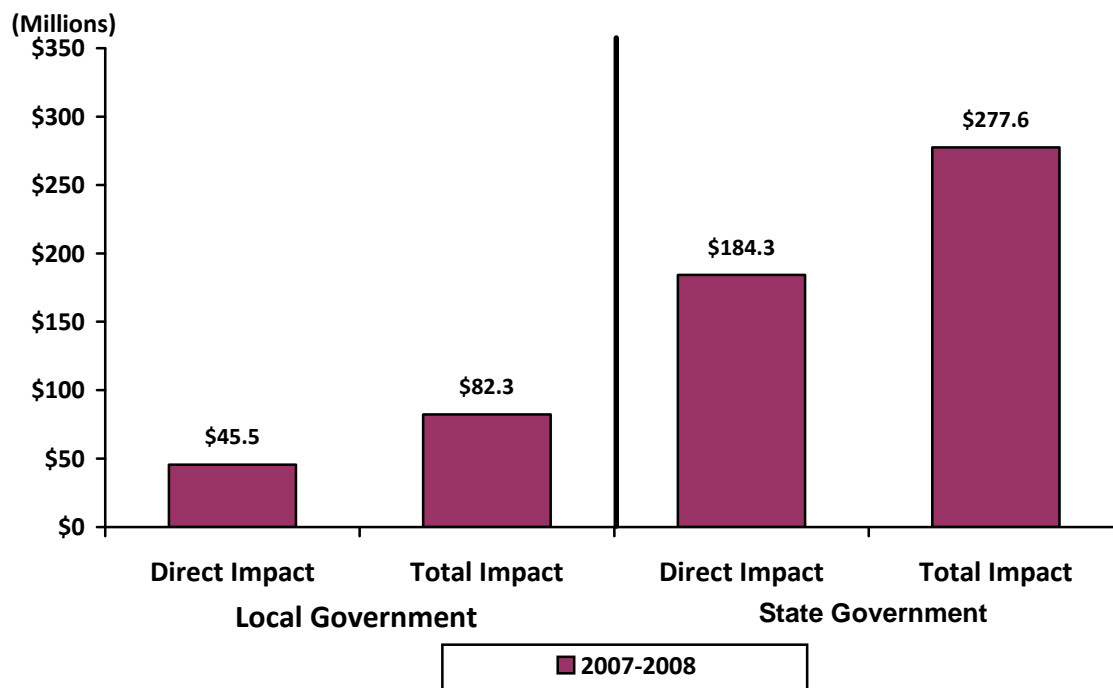
#### 4.5 Impact on State and Local Government Revenues

Traveler expenditures in the Northcentral/West Region led to the receipt of \$277.6 million in state government revenues and \$82.3 million in local government revenues in **total** during the period June 2007 through May 2008.

During the period June 2007 through May 2008, the state government collected \$184.3 million and local governments collected \$45.5 million that were **directly** attributable to traveler expenditures.

Figure 4.5

**Impact of Traveler Expenditures on  
State and Local Government Revenues**  
June 2007 – May 2008



## 5.0 The Northcentral/West Region Lodging and Campground Industry

### 5.1 Summary

For *hotels/motels/B&Bs*, about two-thirds of the available room-nights were sold at an average rate of \$69. Travelers typically traveled as parties of two and stayed two nights. Half the travelers were on pleasure trips and one-third on business trips with about two-thirds of the rooms booked by Minnesota residents and the remaining third by out-of-state travelers.

While average *resort* unit rates were higher (\$138/night), guests were traveling in parties of three or four and they stayed three nights on average. Half the resort units offered were rented. Three-quarters of resort guests were Minnesota residents.

*Campground* sites were rented at an average of \$23 per night with an occupancy rate of 35%. Campers traveled in parties of three and stayed two nights on average. Two out of three campers were Minnesota residents.

## 5.2 Hotel/Motel/B&B Inventory

During June 2007 through May 2008, 237 properties with 9,317 rooms made 3.42 million room-nights available to the public and sold 2.14 million of those room-nights to travelers staying for fewer than 30 nights.

## 5.3 Hotel/Motel/B&B Room Rates and Occupancy

The overall average daily room rate at Northcentral/West Region hotels/motels/B&Bs was \$68.55 during June 2007 through May 2008.

Hotels/motels/B&Bs had an average occupancy rate of 63%.

Table 5.3

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

	<b>June 2007- May 2008 TOTAL</b>	<b>June- August 2007</b>	<b>September- November 2007</b>	<b>December 2007-March 2008</b>	<b>April- May 2008</b>
Average daily room rates*	\$68.55	73.40	\$68.60	\$64.72	\$70.82
Average occupancy*	63%	74%	64%	56%	56%
Total available room-nights (in millions)	3.42	0.87	0.86	1.13	0.57
Total occupied room-nights (in millions)	2.14	0.64	0.54	0.63	0.32

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

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

#### 5.4 Hotel/Motel/B&B Guest Party Size and Length of Stay

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

Table 5.4

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

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007-March <u>2008</u>	April- May <u>2008</u>
Average party size*	1.87	1.98	1.76	1.86	1.83
Average length of stay*	1.73	1.80	1.97	1.61	1.73

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

## 5.5 Hotel/Motel/B&B Guest Trip Purpose and Guest Origin

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

Managers reported that two in three of their guests were Minnesota residents (68%).

Table 5.5  
**Management's Estimate:**  
**Trip Purpose and Guest Origin by Season**  
***(Hotels/Motels/B&Bs)***

	<b>June 2007- May 2008 <u>TOTAL</u></b>	<b>June- August <u>2007</u></b>	<b>September- November <u>2007</u></b>	<b>December 2007-March <u>2008</u></b>	<b>April- May <u>2008</u></b>
<b>Trip Purpose</b>					
Pleasure	54%	51%	52%	57%	51%
Business	34%	37%	29%	31%	41%
Meetings/conventions	12%	11%	19%	12%	8%
<b>Guest Origin</b>					
<u>Out of state</u>	<u>32%</u>	<u>31%</u>	<u>38%</u>	<u>31%</u>	<u>29%</u>
U.S.	22%	21%	28%	21%	21%
Canada	10%	10%	10%	10%	7%
Other foreign	1%	1%	*	1%	1%
Minnesota	68%	69%	62%	69%	71%

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

\* Less than 0.5%

## 5.6 Resort Inventory

Some 532 resorts had 6,973 units available to the public. Resorts made 1.75 million unit-nights available over the 12-month period and sold 0.88 million unit-nights to guests who stayed fewer than 30 nights.

## 5.7 Resort Unit Rates and Occupancy

The average unit rate for a resort was \$137.53 during the period June 2007 through May 2008.

Occupancy rates for resorts averaged 50%.

Table 5.7

### Unit Rates and Occupancy by Season (Resorts)

	<b>June 2007- May 2008 TOTAL</b>	<b>June- August 2007</b>	<b>September- November 2007</b>	<b>December 2007-March 2008</b>	<b>April- May 2008</b>
Average unit rate*	\$137.53	\$169.26	\$126.70	\$135.32	\$104.52
Average occupancy*	50%	78%	30%	38%	35%
Total available unit-nights (in millions)	1.75	0.65	0.45	0.37	0.29
Total occupied unit-nights (in millions)	0.88	0.51	0.13	0.14	0.10

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

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

## 5.8 Resort Guest Party Size and Length of Stay

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

Table 5.8  
**Management's Estimate:**  
**Average Guest Party Size and Length of Stay By Season**  
*(Resorts)*

	<b>June 2007- May 2008 <u>TOTAL</u></b>	<b>June- August <u>2007</u></b>	<b>September- November <u>2007</u></b>	<b>December 2007-March <u>2008</u></b>	<b>April- May <u>2008</u></b>
Average travel party size	3.56	4.20	3.42	3.65	2.52
Average length of stay	3.38	5.46	3.04	2.23	2.42

## 5.9 Resort Guest Trip Purpose and Guest Origin

According to property managers' estimates, three-quarters of resort guests (77%) were traveling on a pleasure trip.

Managers reported that three guests in four were Minnesota residents (76%), while the remaining guests lived outside the state.

Table 5.9

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

	June 2007- May 2008 <u>TOTAL</u>	June- August <u>2007</u>	September- November <u>2007</u>	December 2007-March <u>2008</u>	April- May <u>2008</u>
<b>Trip Purpose</b>					
Pleasure	77%	91%	76%	81%	50%
Business	12%	9%	9%	17%	11%
Meetings/conventions	11%	*	15%	3%	39%
<b>Guest Origin</b>					
<u>Out of state</u>	<u>24%</u>	<u>34%</u>	<u>20%</u>	<u>22%</u>	<u>17%</u>
U.S.	22%	33%	18%	20%	13%
Canada	2%	1%	2%	1%	4%
Other foreign	*	*	*	*	--
Minnesota	76%	66%	80%	78%	83%

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

\* Less than 0.5%

### 5.10 Campground Inventory

The Northcentral/West Region campground providers offered 10,539 sites in 319 campgrounds to the public for use during the period June 2007 – May 2008. That yielded a total of 1.94 million site-nights available, with 0.67 million site-nights sold to guests staying fewer than 30 nights. Campgrounds on both public and private lands are included in the inventory.

### 5.11 Campground Site Rates and Occupancy

The average rate for a campground site was \$23.36.

The average occupancy rate for the Northcentral/West Region campgrounds was 35% over the 12-month period. Occupancy rates were highest in the summer (53%) and lowest in the winter (2%).

Table 5.11

**Site Rates and Occupancy by Season**  
***(Campgrounds)***

	<b>June 2007- May 2008 TOTAL</b>	<b>June- August 2007</b>	<b>September- November 2007</b>	<b>December 2007-March 2008</b>	<b>April- May 2008</b>
Average site rate*	\$23.36	\$23.03	\$25.21	N/A	\$22.90
Average occupancy*	35%	53%	24%	2%	12%
Total available site-nights (in millions)	1.94	0.98	0.45	0.18	0.34
Total occupied site-nights (in millions)	0.67	0.52	0.11	**	0.04

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

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

N/A: Campgrounds surveyed had sites available for short-term rental but no guests during the December 2007 through March 2008 time period, and therefore, had no figures to report. Projections were made for the balance of the campgrounds based on the averages from all campgrounds surveyed across the state in the winter season.

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

## 5.12 Campground Guest Party Size and Length of Stay

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

Table 5.12

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

	<b>June 2007- May 2008 TOTAL</b>	<b>June- August 2007</b>	<b>September- November 2007</b>	<b>December 2007-March 2008</b>	<b>April- May 2008</b>
Average travel party size	2.98	3.06	3.11	N/A	2.65
Average length of stay	2.42	2.58	2.46	N/A	1.92

N/A: Campgrounds surveyed had sites available for short-term rental but no guests during the December 2007 – March 2008 time period, and therefore, had no figures to report.

### 5.13 Campground Guest Origin

The Northcentral/West Region campground managers reported that just over two-thirds of Northcentral/West Region campers (69%) were Minnesota residents.

Table 5.13

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

	<b>June 2007- May 2008 TOTAL</b>	<b>June- August 2007</b>	<b>September- November 2007</b>	<b>December 2007-March 2008</b>	<b>April- May 2008</b>
<b>Guest Origin:</b>					
<u>Out of State</u>	<u>31%</u>	<u>37%</u>	<u>27%</u>	<u>N/A</u>	<u>21%</u>
U.S.	26%	30%	20%	N/A	20%
Canada	6%	6%	7%	N/A	2%
Other Foreign	*	*	--	N/A	--
Minnesota	69%	63%	73%	N/A	79%

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

\* Less than 0.5%

N/A: Campgrounds surveyed had sites available for short-term rental during the December 2007 – March 2008 time period but no guests during this time period, and therefore, had no figures to report.

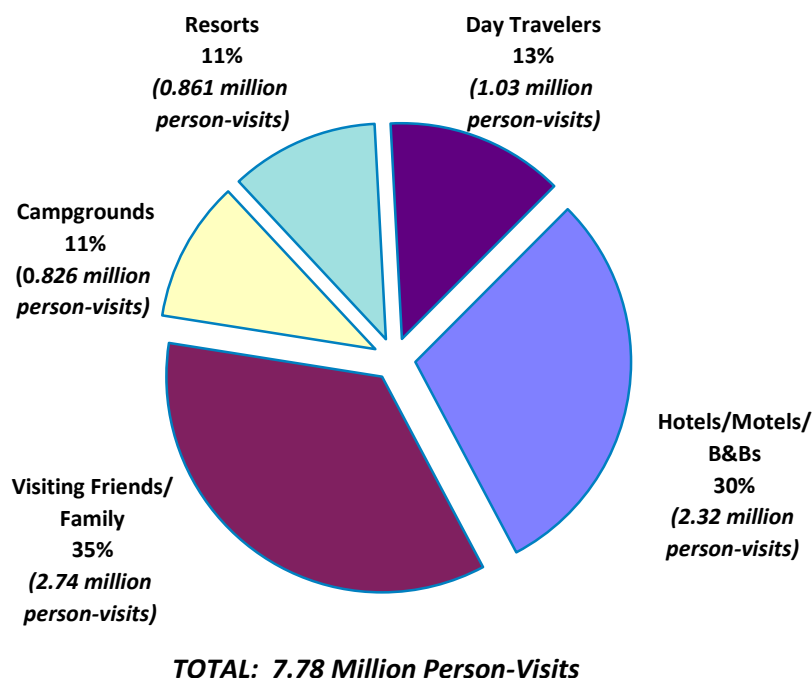
## 6.0 Travel Volume in the Northcentral/West Region

Person-visits in the Northcentral/West Region totaled 7.78 million during the period June 2007 through May 2008. A total of 6.75 million were overnight person visits – one person staying in one accommodation. In addition, day travelers in the Northcentral/West Region were estimated at 1.03 million.

Travelers staying with family and/or friends represented 35% of person-visits while travelers staying in hotel/motel/B&B guests represented 30%. Campers accounted for 11% of person-visits while travelers staying in resorts made up 11% of the person-visits in the Northcentral/West Region in June 2007 through May 2008. Thirteen percent of person-visits were attributed to day travelers.

Figure 6.0

### The Northcentral/West Region Person-Visits



**Note:** A **person-visit** is classified in this report as one person on a day trip or one person staying overnight in one accommodation for one or more nights. For example, a couple on a three-night weekend is counted as two person-visits. If a guest to Northcentral/West Minnesota travels to many locations in the region, staying overnight in many different accommodations, each overnight stay is considered a person-visit. Therefore, 7.78 million person-visits should not necessarily be interpreted as 7.78 million travelers.

## 7.0 The Profile of Travelers in the Northcentral/West Region

This section details the findings concerning the profile of Northcentral/West Region travelers overall and by each season during the period from June through May. For the purposes of the traveler profile analysis, interview responses from the 2007-2008 study period have been combined with interview responses from the 2005-2006 study period. The combined data yield results that are more reliable and representative than the results for either of the two interview periods alone – the effect of roughly doubling the sample size and including traveler interviews at a broader selection of traveler sites.

### 7.1 Demographic and Socioeconomic Profile

- The average age of Northcentral/West Region travelers was 43.1 years. Travelers in the fall and winter seasons tended to be younger (41.0 and 41.2 years respectively) than the summer season (44.9 years).
- The median household income was \$57,800. Summer and spring season travelers had higher median incomes (\$66,800 and \$69,300 respectively) than fall season travelers (\$40,100).
- Nine travelers in ten identified themselves as white (89%). Spring season travelers (96%) were more likely to categorize themselves as white than were travelers in other seasons.
- The vast majority of Northcentral/West travelers lived in the United States (97%) and half were residents of Minnesota (49%). Beyond Minnesota, the leading state of residence among Northcentral/West travelers was North Dakota (22%).

The proportion of in-state travelers was lower in the fall season (28%) than in other seasons (54%-62%). In contrast, fall season travelers were more likely to be North Dakota residents (48%) than were travelers in other seasons.

- One Northcentral/West region traveler in three (32%) lived in the Fargo-Valley City Designated Market Area (DMA)\* while another one in three (31%) lived in the Minneapolis-St. Paul DMA. The incidence of Northcentral/West travelers who reside in any other DMA was 3% or less.

\* Designated Market Area or DMA is a group of counties in the United States that are covered by a specific group of television stations. There are 210 DMAs in the United States.

Table 7.1  
**Demographic and Socioeconomic Profile**

*2005-2006 and 2007-2008 Combined*

	June-May Total	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
<b>Base:</b>	<b>884</b>	<b>346</b>	<b>204</b>	<b>195</b>	<b>139</b>
<b>Age:</b>					
18 to 24	10%	7%	14%	14%	7%
25 to 29	11	8	13	13	11
30 to 39	21	22	20	22	21
40 to 49	23	26	22	16	28
50 to 59	20	21	23	17	18
60 to 64	5	5	3	6	8
65 and older	8	10	4	9	8
No Answer	1	2	1	3	*
<b>Average Age</b>	<b>43.1</b>	<b>44.9</b>	<b>41.0</b>	<b>41.5</b>	<b>44.2</b>
<b>Income:</b>					
Less than \$25,000	14%	7%	27%	19%	5%
\$25,000 to \$34,999	13	10	18	14	9
\$35,000 to \$49,999	14	15	14	15	15
\$50,000 to \$74,999	22	21	28	18	24
\$75,000 to \$99,999	13	14	8	16	16
\$100,000 to \$124,999	9	11	3	8	14
\$125,000 to \$149,999	4	5	1	3	3
\$150,000 or more	6	9	1	6	8
No Answer	5	7	1	5	6
<b>Estimated Median Income</b>	<b>\$57,800</b>	<b>\$66,800</b>	<b>\$40,100</b>	<b>\$54,300</b>	<b>\$69,300</b>
<b>Gender:</b>					
Male	49%	47%	48%	47%	58%
Female	47	48	49	49	41
No Answer	3	5	3	4	1
<b>Racial/Ethnic Background:</b>					
White	89%	91%	84%	89%	96%
American Indian	3	3	3	4	2
Black	3	3	5	1	2
Hispanic	2	2	4	2	-
Asian	1	1	-	2	1
Other	1	*	2	2	1
No Answer	2	2	3	*	*

\* Less than 0.5%

**Table 7.1 (cont'd)**  
**Demographic and Socioeconomic Profile**

*2005-2006 and 2007-2008 Combined*

	<b>June-May</b>	<b>June- August</b>	<b>September- November</b>	<b>December- March</b>	<b>April- May</b>
	<u><b>Total</b></u>	<u><b>(Summer)</b></u>	<u><b>(Fall)</b></u>	<u><b>(Winter)</b></u>	<u><b>(Spring)</b></u>
<b>Base:</b>	<b>884</b>	<b>346</b>	<b>204</b>	<b>195</b>	<b>139</b>
<b>Residence:</b>					
<u>United States</u>	<u>97%</u>	<u>95%</u>	<u>98%</u>	<u>99%</u>	<u>99%</u>
Minnesota	49	54	27	54	62
North Dakota	22	8	48	25	10
Iowa	3	6	1	1	1
Illinois	2	2	4	*	1
South Dakota	2	1	2	3	1
Other state	11	16	7	7	8
State not specified	9	7	9	9	16
Canada	2	4	1	*	1
Another Country	*	1	*	*	*
No Answer	1	1	2	*	*
<b>Residence by DMA:</b>					
Fargo-Valley City	32%	14%	65%	39%	20%
Minneapolis-Saint Paul	31	38	5	37	44
Duluth-Superior	3	5	2	1	6
Minot-Bismarck-Dickinson (Williston)	2	2	3	2	1
Sioux Falls (Mitchell)	2	1	1	3	1
Rochester-Mason City-Austin	2	3	*	1	2
Other DMAs	16	25	12	7	9

\* Less than 0.5%

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

## 7.2 Travel Party and Trip Profile

### Travel Party

- Three travelers in four were on a vacation or short pleasure trip (76%), while one in five was traveling for personal reasons, e.g., wedding, funeral, medical, etc. (18%).

Travelers in the winter season were less likely to be traveling for a vacation or short pleasure trip (59%) than were travelers in summer (85%), spring (80%), and fall (74%). However, winter travelers were more likely to be traveling for business/work (16%).

- The average travel party size was 3.0 people. Travelers in the summer season were more likely to have larger travel parties (3.3 people) than travelers in the fall and winter seasons (2.9 and 2.6 respectively).
- The average number of nights travelers intended to stay overnight was 3.5 nights. The length of stay was longest in the summer (4.6 nights) and shortest in the winter (2.4 nights).
- Nearly two-thirds of Northcentral/West travelers had no children younger than 18 in their travel party (62%). Fall (69%) and winter (71%) season travelers were more likely to be traveling without children than were summer (56%) and spring travelers (55%).
- The vast majority of Northcentral/West travelers had taken a trip in Minnesota in the last five years (95%), with an estimated median of 6.4 trips among these travelers. Trip frequency was lowest among fall season travelers (estimated median trips of 4.6) compared with travelers in summer (6.4 estimated median), winter (8.0 estimated median), and spring (8.0 estimated median).

## Trip Profile

- Over two-thirds (70%) of travelers in the Northcentral/West Region stayed in *paid* accommodations on their trip, primarily hotels/motels/historic inns (44%). One traveler in five stayed in *unpaid* accommodations (22%).

When compared with travelers in other seasons, summer travelers were less likely to stay in a hotel/motel/historic inn (28%) than were fall (56%), winter (56%), and spring (40%) travelers. In contrast, summer season travelers were more likely to stay at a resort (23%) than travelers in other seasons. Fall season travelers were more likely to stay at the home of family or friends (24%) than were summer (10%) and spring (13%) travelers.

Only a minority of travelers said they were taking a day trip (8%) and did not stay in any type of overnight accommodations on their trip.

- Travelers participated in numerous activities during their trip. Dining out (64%), shopping (56%), visiting friends or relatives (39%), and sightseeing or driving for pleasure (28%) were among the most frequently mentioned trip activities.

## General Activities

Dining out was a key activity for travelers in all seasons but more prevalent among winter travelers (77%) than among summer (60%) and spring (56%) travelers. Sightseeing or driving for pleasure (19%) and casino gaming (10%) were less common activities among winter travelers than among travelers in other seasons. Fall travelers were more likely to participate in casino gaming (43%) and viewing fall colors (20%). A higher proportion of fall (32%) and winter (30%) travelers participated in nightlife or evening entertainment as compared with spring (17%) and summer (11%) travelers.

## Shopping

Just over half of Northcentral/West Region travelers did some type of shopping on their trip (56%), mostly for gifts and souvenirs (33%).

Fall season travelers more frequently mentioned shopping (73%) than did summer, winter, or spring travelers (51% summer, 57% winter, and 41% spring). In particular, fall season travelers were more likely to have shopped at outlets (24%) or the Mall of America (18%) than travelers in other seasons. Summer and fall season travelers were more likely to shop for gifts or souvenirs (36% and 43%) than

were winter and spring travelers (25% and 23%). Fall and winter travelers (20% and 21%) were more likely to shop for arts, crafts, or antiques than were summer (13%) and spring (7%) travelers.

### **Visiting People or Places**

Two travelers in five indicated they were visiting friends or relatives (39%) while one in five said they were visiting state or national parks (21%).

Fall travelers were more likely to visit friends and relatives (57%), art museums (16%), and Indian areas (11%) than were those in other seasons. The incidence of visiting state or national parks was higher among fall season travelers (41%) than among travelers in other seasons. Summer and fall season travelers more often mentioned visiting amusement parks or carnivals (18% and 20%) than did winter (3%) and spring (2%) travelers.

### **Active Recreation**

Over two-thirds of Northcentral/West travelers participated in “active” recreation (71%). The array of activities was diverse, with fishing (28%) and pool swimming (23%) topping the list.

Partaking in active recreation was most prevalent among summer travelers (84%). The most frequently cited activities included: fishing (49%), lake/river swimming (39%), motor boating/water skiing (32%), pool swimming (22%), golfing (21%), biking, hiking and wildlife viewing/bird watching (all 17%).

The top active recreation pursuits among travelers in other seasons were:

- Fall and winter – pool swimming (28% and 23% respectively)
- Spring – fishing (34%), pool swimming (21%), golfing (19%), hiking (17%), lake/river swimming (16%), and biking (14%).
- Fall – pool swimming (28%) and fishing (15%).
- Winter – pool swimming (23%), downhill skiing or snowboarding (11%), and ice fishing (9%).

### **Attending Events**

Less than one-third of travelers (29%) indicated they had attended an “event” while on their trip in the Northcentral/West Region.

A higher proportion of spring travelers attended amateur sporting events (20%) than did travelers in any other season. Attending popular music concerts or shows was more prevalent among fall and winter travelers (9% and 5% respectively). Attending fairs and festivals was more prevalent among summer travelers (10%) than it was among winter (5%) and spring (4%) travelers.

**Table 7.2**  
**Travel Party and Trip Profile**

*2005-2006 and 2007-2008 Combined*

	June-May <u>Total</u> Base: 884	June- August ( <u>Summer</u> ) 346	September- November ( <u>Fall</u> ) 204	December- March ( <u>Winter</u> ) 195	April- May ( <u>Spring</u> ) 139
<b>Trip Purpose (multi-response):</b>					
Vacation or short pleasure trip	76%	85%	74%	59%	80%
Personal (e.g., wedding, funeral, medical, etc.)	18	12	21	27	14
Business or work	6	3	5	16	2
Convention or conference	3	2	4	4	6
No Answer	1	1	*	*	*
<b>Travel Party Size:</b>					
1 person	12%	8%	9%	25%	8%
2 people	32	28	39	32	33
3 to 4 people	36	37	40	28	38
5 or more people	19	25	12	14	21
<b>Average Travel Party Size</b>	<b>3.0</b>	<b>3.3</b>	<b>2.9</b>	<b>2.6</b>	<b>3.1</b>
<b>Total Trip Length of Stay:</b>					
Daytripper	8%	8%	9%	7%	8%
1 night	16	10	10	28	21
2 nights	27	18	29	38	29
3 to 6 nights	35	34	46	22	37
7 or more nights	14	30	6	4	5
<b>Average Nights (Excluding Daytrippers)</b>	<b>3.5</b>	<b>4.6</b>	<b>3.2</b>	<b>2.4</b>	<b>2.7</b>
<b>Children in Travel Party</b>					
One or more children under 18	38%	44%	31%	29%	45%
No children	62	56	69	71	55
<b>Ages of Children in Travel Party</b>					
<i>Younger than 6 years old</i>					
None	83%	81%	86%	84%	80%
One or more	17	19	14	16	20
<i>6 to 11 years old</i>					
None	80%	73%	89%	85%	79%
One or more	20	27	11	15	21
<i>12 to 17 years old</i>					
None	83%	81%	84%	88%	79%
One or more	17	19	16	12	21

\* Less than 0.5%

**Table 7.2 (cont'd)**  
**Travel Party and Trip Profile**

*2005-2006 and 2007-2008 Combined*

	June-May <u>Total</u>	June- August <u>(Summer)</u>	September- November <u>(Fall)</u>	December- March <u>(Winter)</u>	April- May <u>Total</u>
<b>Base:</b>	<b>884</b>	<b>346</b>	<b>204</b>	<b>195</b>	<b>139</b>
<b>Minnesota Trips in Last 5 Years</b>					
None	4%	6%	2%	4%	4%
1 trip	7	7	9	4	7
2 to 4 trips	31	29	44	27	24
5 to 10 trips	27	31	25	24	24
More than 10 trips	30	27	20	40	39
No Answer	1	1	1	1	1
<b>Estimated Median Trips</b>	<b>6.4</b>	<b>6.4</b>	<b>4.6</b>	<b>8.0</b>	<b>8.0</b>
<b>Lodging:</b>					
<u>Paid Accommodations</u>	<u>70%</u>	<u>74%</u>	<u>63%</u>	<u>72%</u>	<u>69%</u>
Hotel/Motel/Historic Inn	44	28	56	62	40
Resort	11	23	2	7	4
Bed & Breakfast	1	*	1	2	*
Vacation home/condo/cabin/ houseboat you rented	2	3	1	1	3
In a tent at a campground	5	5	3	*	12
In an RV at a campground	7	14	*	*	11
<u>Unpaid Accommodations</u>	<u>22%</u>	<u>18%</u>	<u>28%</u>	<u>21%</u>	<u>22%</u>
Home of family or friends	15	10	24	16	13
Vacation home/condo/cabin/ houseboat of family or friends	4	4	4	4	6
At your vacation home/ condo/ cabin/ houseboat	2	3	*	1	1
At a campground with no fee	1	1	*	*	2
<u>Day tripper</u>	<u>8%</u>	<u>8%</u>	<u>9%</u>	<u>7%</u>	<u>8%</u>

\* Less than 0.5%

**Table 7.2 (cont'd)**  
**Travel Party and Trip Profile**

*2005-2006 and 2007-2008 Combined*

	June-May <u>Total</u>	June- August <u>(Summer)</u>	September- November <u>(Fall)</u>	December- March <u>(Winter)</u>	June-May <u>Total</u>
<b>Base:</b>	<b>884</b>	<b>346</b>	<b>204</b>	<b>195</b>	<b>139</b>

**Activities:**

<u>General (checked one or more)</u>	<u>83%</u>	<u>79%</u>	<u>92%</u>	<u>89%</u>	<u>73%</u>
Dining out	64	60	66	77	56
Sightseeing/driving for pleasure	28	32	30	19	25
Casino gaming	23	22	43	10	12
Nightlife/evening entertainment	21	11	32	30	17
Driving on designated scenic byways	13	16	10	10	12
Taking in city sites	12	15	10	12	9
Viewing fall colors	6	4	20	*	*
<u>Shopping (checked one or more)</u>	<u>56%</u>	<u>51%</u>	<u>73%</u>	<u>57%</u>	<u>41%</u>
For gifts or souvenirs	33	36	43	25	23
General or mall shopping	24	19	33	25	20
Arts, crafts, antiques	15	13	20	21	7
Outlet shopping	12	7	24	9	7
At the Mall of America	7	6	18	3	1
<u>Visiting (checked one or more)</u>	<u>66%</u>	<u>69%</u>	<u>73%</u>	<u>56%</u>	<u>64%</u>
Friends or relatives	39	32	57	40	32
State or national parks	21	19	22	6	41
Amusement parks or carnivals	13	18	20	3	2
Historic sites	12	13	15	7	11
Indoor water parks	8	5	13	6	10
Other museums	8	6	13	8	3
Art museums	7	3	16	6	2
Indian areas	5	3	11	3	3
Outdoor water parks	4	3	14	*	*
Other attraction					

\* Less than 0.5%

**Table 7.2 (cont'd)**  
**Travel Party and Trip Profile**

*2005-2006 and 2007-2008 Combined*

	June-May <u>Total</u>	June- August <u>(Summer)</u>	September- November <u>(Fall)</u>	December- March <u>(Winter)</u>	April- May <u>(Spring)</u>
<b>Base:</b>	<b>884</b>	<b>346</b>	<b>204</b>	<b>195</b>	<b>139</b>
<u>Participating In (checked one or more)</u>	<u>71%</u>	<u>84%</u>	<u>63%</u>	<u>53%</u>	<u>76%</u>
Fishing	28	49	15	*	34
Pool swimming	23	22	28	23	21
Lake/river swimming	20	39	9	*	16
Motor boating/water skiing	16	32	6	*	10
Golfing	14	21	11	*	19
Hiking	13	17	10	6	17
Biking	11	17	7	3	14
Wildlife viewing or bird watching	11	17	8	5	9
Canoeing	7	11	5	*	11
Jet skiing	6	9	7	*	6
Off-road ATV driving	4	4	4	1	5
Downhill skiing or snowboarding	2	*	1	11	*
Hunting	2	3	4	1	1
Ice Fishing	2	*	*	9	*
Snowmobiling	2	*	1	7	*
Cross-country skiing	1	*	*	4	1
Other activity	7	9	4	8	61
<u>Attending (checked one or more)</u>	<u>29%</u>	<u>26%</u>	<u>34%</u>	<u>26%</u>	<u>34%</u>
Fairs or festivals	8	10	9	5	4
Amateur sporting events	9	6	5	9	20
Professional sporting events	4	7	2	*	1
Popular music concerts or shows	4	1	9	5	4
Theater performances	2	1	1	5	1
Classical music concerts	1	1	1	2	2
Other events	8	6	13	9	6
No Answer	*	*	*	1	*

\*Less than 0.5%

### 7.3 Travel Planning Sources

Among 2007-2008 Northcentral/West Region travelers, the most frequently cited information sources used in trip planning were friends/relatives/co-workers (60%) and the Internet (33%). Few travelers said they used each of the other sources of trip planning information (11% or less).

Travelers in the fall were more likely to have used friends/relatives/co-workers (75%) as their information source as compared with travelers in the summer and spring seasons (57% and 41% respectively). Travelers in the fall season were less likely to use the Internet (21%) than those in the summer (40%) and spring (36%).

**Table 7.3:**  
**Travel Planning Sources**

	June 2007 – May 2008	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
Base:	403	163	89**	94**	57**
Friends/relatives/co-workers	60%	57%	75%	62%	41%
Internet	33	40	21	31	36
Brochure/travel guide	11	14	13	8	5
Newspaper/magazine	3	4	*	2	4
TV/radio	3	3	4	1	4
Visitor/welcome center	3	4	4	2	3
Local tourism bureau	2	4	1	2	1
State Travel Office	2	1	1	2	2
Airline/travel agency	1	*	1	1	1
Other	14	15	7	14	24

\*Less than 0.5%

\*\*Small sample size.

**Note:** This question not included in the 2005-2006 study.

**Appendix A:  
Procedures**

## Technical Appendix: The Research Procedures

### **Introduction**

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

### **A. What is Economic Impact?**

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

### **B. What is a Traveler?**

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

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

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

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

### C. Additional Explanations

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

This procedure for assessing economic impact provides accurate estimates of current year figures. Methods and numbers are constantly being reviewed to improve the estimating procedures.

#### D. The Basic Research Steps for the 2007-2008 Northcentral/West

What follows is a brief description of the procedures for estimating economic impact as they were completed in 2007-2008.

##### 1. Lodging Inventory Update

At the beginning of the 2007-2008 study, Davidson-Peterson Associates received a copy of the inventory of lodging properties maintained by Explore Minnesota Tourism. This list was compared to the ending inventory from the 2005-2006 study. Any additions or deletions gathered from this comparison were incorporated into the starting inventory for the 2007-2008 study. In addition, the seasonal surveys of lodging business activity (see #2 below) allowed for further clarifications and refinements.

New properties in the updated inventory are systematically sampled so as to have representation in the overall sampling plan for each season.

##### 2. Sampling

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

##### 3. Seasonal Survey of Paid Lodging Business Activity

Every property included in the state survey sample was contacted and asked to complete an interview by phone. Those who did not participate by phone were asked to complete the questionnaire via email, fax, or mail. Additional properties in counties participating in special economic impact studies are added to the state sample.

A total of 576 contacts with lodging properties in the Northcentral/West Region were made during the course of the year resulting in 441 completed surveys as follows:

**Number of Interviews by Season (Northcentral/West Region)**

Season	Interview Period	# Contacted	# Completed
Summer	June - August	151	116
Fall	September - November	141	96
Winter	December - March	143	115
Spring	April - May	141	114

#### 4. Resident (VFR) Survey

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

A total of 1,000 VFR interviews were completed during the 2007-2008 period, with an equal proportion of interviews conducted each season.

#### 5. Traveler Expenditure Survey/Modeling

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

A total of 2,023 Traveler Expenditure surveys were completed during the period June 2007 through May 2008 at a variety of sites across Minnesota. Sites were chosen by selecting a county and zip code for each region based on the array of properties by size. Essentially, the counties where a sizable volume of overnight accommodations exist to serve travelers had a greater chance to be selected. Within the selected zip codes, an array of sites were chosen to maximize the ability to find a variety of tourists on site. The table below shows the total number of completed interviews by season.

**Number of Interviews by Season (Statewide)**

Season	Interview Period	# Completed
Summer	June – August	795
Fall	September – November	364
Winter	December – March	480
Spring	April – May	384

Roughly equal proportions of interviews were completed in each of the four Explore Minnesota Tourism regions. Of the 2,023 questionnaires, a small number were excluded from the economic impact sample due to their failure to complete all five questions necessary to include their responses in the model. The combined total of interviews from the 2005-2006 and the 2007-2008 study periods were used to calculate the expenditure ratios by spending category, which were then applied to the state and each of its four regions.

#### 6. Economic Impact Data Calculations

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

## 7. Input/Output (I/O) Modeling

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

### E. Limitations on Comparisons of Results between Study Periods (2005-2006 vs. 2007-2008)

Comparisons of economic impact results between the 2007-2008 study and the 2005-2006 study are limited due to the following:

#### 1. Traveler Expenditure and Visitation Volume Estimates

The traveler expenditure and visitation volume estimates were arrived at using the data collected from the three surveys described in Section D. The basic procedures employed in calculating these volumetric estimates were the same for the two study periods.

However, during the course of the 2007-2008 period, additional data and/or new information was collected in the Seasonal Survey of Paid Lodging Business Activity that was not available when the prior study's traveler expenditure estimates were made, including:

- Changes in the lodging inventory that were unidentifiable during the prior study (such as property expansion, closed properties, increased number of rooms, etc.);
- Properties that did not participate in the previous study but have participated in the current study; or
- Properties that participated in the previous study but were able to provide more complete or more accurate information in the current study.

Reconciling these differences and revising the expenditure estimates for the 2005-2006 study was not included in the scope of the current research program. As a result, there is some degree of incongruity between the traveler expenditure and visitation volume estimates in 2007-2008 and 2005-2006.

#### 2. Input-Output Modeling

The input-out model has been revised since the 2005-2006 study period. The model revisions encompass:

- Updates in the U.S. government data sources used to construct the model, e.g., County Business Patterns, Regional Economic Information System, State and Local Government Finance data; and
- Revisions to the modeling procedures (i.e., interactions of the impact adjustments) within the input-output model to refine and improve estimates generated.

Therefore, the model used to generate the 2007-2008 direct and total economic impact estimates is not equivalent to that used to generate the 2005-2006 estimates and comparisons of results should not be made.

### 3. Lodging Inventory Classification

In the 2007-2008 study, Explore Minnesota Tourism undertook a review of indoor lodging properties in our lodging database with regard to their property type classification, i.e., hotels/motels/B&Bs, resorts, and campgrounds. This resulted in approximately 70 properties that were re-classified from the “hotels/motels/B&Bs” category to the “resorts” category. Therefore, the data presented **by accommodation type** in this report is not comparable to what was reported in the 2005-2006 annual report.

### 4. Seasonal Definitions

The definitions for the winter and spring seasons, i.e., the months included in each season, differ from the 2005-2006 study to the 2007-2008 study. In the 2007-2008 study, winter included December, January, February, and March (4 months) and spring included April and May (2 months). In the 2005-2006 study, winter included December, January, and February (3 months) and spring included March, April, and May (3 months). Therefore, the data presented **by season** in this report is not comparable to what was reported in the 2005-2006 annual report.

A summary of the key estimates from the 2005-2006 economic impact study is included in Appendix B, Table B-5 for reference only.

### F. Additional Procedures for the Traveler Profile Study

Davidson-Peterson Associates used a stratified cluster sampling technique in an effort to represent all types of travelers across the four Minnesota regions. The technique allowed us to select systematically the geographic locations (i.e., zip codes) within each region that would form the sampling frame. Minimum quotas were established in total and by region to ensure that an adequate number of interviews were completed for the season.

To provide more robust sample sizes and include interviews at a broader selection of traveler sites, survey responses from the 2007-2008 study have been combined with those from the 2005-2006 study. The table below shows the total number of completed interviews among travelers **statewide** by year and season.

**Number of Minnesota Traveler Interviews**

Season	Interview Period	2007-2008	2005-2006	Total Interviews
Summer	June – August	795	869	1,664
Fall	September – November	364	449	813
Winter	December – March	480	580	1,060
Spring	April – May	384	394	778
<b>Total</b>	<b>June - May</b>	<b>2,023</b>	<b>2,292</b>	<b>4,315</b>

In total, 1,026 usable questionnaires were collected from travelers in the **Northcentral/West Region** of Minnesota and returned to Davidson-Peterson Associates. Some 432 were conducted from June 2007 through May 2008 and 594 from June 2005 through May 2006.

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

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

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

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

*June 2007 through May 2008*

	Proportion of Person-Visits	Actual Completes	Weights Applied	Balanced Completes
<u>June – August 2007</u>	<u>37.2%</u>	<u>795</u>		<u>751</u>
Metro	15.5%	216	1.449	313
Northcentral/West	8.1%	167	0.976	163
Southern	7.5%	229	0.660	151
Northeast	6.1%	183	0.676	124
 <u>September - November 2007</u>	 <u>24.2%</u>	 <u>364</u>		 <u>490</u>
Metro	11.5%	102	2.290	234
Northcentral/West	4.4%	67	1.323	89
Southern	4.7%	113	0.846	96
Northeast	3.6%	82	0.883	72
 <u>December 2007 - March 2008</u>	 <u>24.0%</u>	 <u>480</u>		 <u>486</u>
Metro	11.8%	137	1.747	239
Northcentral/West	4.7%	98	0.962	94
Southern	4.7%	122	0.780	95
Northeast	2.8%	123	0.464	57
 <u>April - May 2008</u>	 <u>14.6%</u>	 <u>384</u>		 <u>296</u>
Metro	6.9%	103	1.354	139
Northcentral/West	2.8%	100	0.574	57
Southern	2.7%	94	0.571	54
Northeast	2.3%	87	0.522	45
 <u>Total</u>	 <u>100.0%</u>	 <u>2,023</u>		 <u>2,023</u>
Metro	45.7%	558		925
Northcentral/West	19.9%	432		403
Southern	19.6%	558		396
Northeast	14.8%	475		299

**Appendix B:  
Economic Impact - Supporting Tables**

Table B-1

**Estimated Traveler Expenditures  
By Category of Expenditure and  
Accommodation Used  
June 2007 through May 2008  
(\$ Millions)**

	Paid Accommodations			No Lodging Expense		TOTAL
	Hotels/ Motels/ B&Bs	Resorts	Camp- grounds	Visiting Friends/ Relatives	Day Tripper	
Food	\$138.99	\$124.33	\$38.52	\$239.95	\$14.79	\$556.58
<u>Shopping</u>	<u>\$152.40</u>	<u>\$73.61</u>	<u>\$61.92</u>	<u>\$209.89</u>	<u>\$15.72</u>	<u>\$513.54</u>
General	85.74	28.88	34.39	143.31	8.12	300.43
Traveler	66.66	44.73	27.53	66.58	7.60	213.11
<u>Recreation</u>	<u>\$129.93</u>	<u>\$100.11</u>	<u>\$50.01</u>	<u>\$273.51</u>	<u>\$20.62</u>	<u>\$574.18</u>
Liquor	23.35	37.45	14.46	82.00	1.70	158.97
Historic	4.85	1.49	2.89	7.16	0.66	17.04
Sightseeing	11.71	4.16	2.05	9.22	0.73	27.87
Event fees	18.82	3.57	7.38	29.70	3.71	63.17
Sport fees	14.98	17.63	4.37	30.29	3.43	70.71
Cultural event fees	2.58	1.04	0.08	10.89	0.76	15.35
Evening entertainment	14.54	6.69	3.77	44.30	0.67	69.96
Licenses	4.66	14.66	4.85	16.72	0.54	41.43
Sweepstakes	2.90	2.13	0.62	11.72	0.51	17.88
Wagering	31.22	10.45	8.80	23.70	7.80	81.98
Other	0.31	0.84	0.74	7.81	0.11	9.82
Lodging	147.55	133.49	15.36	0.00	0.00	296.41
Ground Transportation	60.62	63.80	34.71	113.74	6.59	279.46
<b>Total</b>	<b>\$629.49</b>	<b>\$495.34</b>	<b>\$200.51</b>	<b>\$837.10</b>	<b>\$57.72</b>	<b>\$2,220.16</b>

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

Table B-2

**Estimated Traveler Expenditures  
By Season  
June 2007 through May 2008  
(\$ Millions)**

	June- August 2007	September- November 2007	December 2007- March 2008	April- May 2008	TOTAL
Food	\$255.23	\$124.25	\$103.95	\$73.15	\$556.58
<u>Shopping</u>	<u>\$231.08</u>	<u>\$118.27</u>	<u>\$97.59</u>	<u>\$66.60</u>	<u>\$513.54</u>
General	131.30	70.97	57.75	40.41	300.43
Traveler	99.79	47.29	39.84	26.19	213.11
<u>Recreation</u>	<u>\$262.30</u>	<u>\$130.01</u>	<u>\$104.64</u>	<u>\$77.23</u>	<u>\$574.18</u>
Liquor	76.28	34.82	26.91	20.95	158.97
Historic	7.80	3.94	3.07	2.23	17.04
Sightseeing	11.80	6.51	5.86	3.69	27.87
Event fees	27.22	15.07	12.18	8.70	63.17
Sport fees	32.86	15.65	13.13	9.07	70.71
Cultural event fees	6.18	3.79	3.09	2.28	15.35
Evening entertainment	29.73	16.73	13.35	10.15	69.96
Licenses	21.90	8.26	6.10	5.17	41.43
Sweepstakes	7.96	4.08	3.04	2.79	17.88
Wagering	35.90	18.97	16.54	10.58	81.98
Other	4.65	2.19	1.36	1.62	9.82
Lodging	\$144.60	\$58.79	\$59.15	\$33.87	\$296.41
Ground Transportation	\$134.94	\$60.94	\$48.25	\$35.33	\$279.46
<b>Total</b>	<b>\$1,028.15</b>	<b>\$492.24</b>	<b>\$413.59</b>	<b>\$286.18</b>	<b>\$2,220.16</b>

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

**Seasonal Analysis**

	June- August 2007	September- November 2007	December 2007- March 2008	April -May 2008
Share of seasonal expenditures	46%	22%	19%	13%
Share of days in year	25%	25%	33%	17%
Ratio	1.84	0.89	0.55	0.77

Table B-3

**Estimated Traveler Expenditures:  
Average per Person per Day**

**June 2005 through May 2006 and  
June 2007 through May 2008 Combined**

	Average Expenditures per Person per Day
<b>Total - All Travelers</b>	<b>\$109.00</b>
<b>Travelers with Paid Accommodations</b>	
Hotels/Motels/B&Bs	\$125.00
Resorts	\$106.00
Campgrounds	\$79.00
<b>Travelers with No Lodging Expenses</b>	
Visiting Friends/Relatives (or other unpaid lodging)	\$113.00
Day Trippers	\$85.00

Note: Estimated average expenditures per person per day are calculated from data collected among travelers surveyed on-site while on their Minnesota trip. Interview responses from the 2007-2008 study have been combined with those from the 2005-2006 study to generate these averages.

Table B-4

**Estimated Impact of Traveler Expenditures  
on the Economy of the Northcentral/West Region  
June 2007 through May 2008**

	June 2007-May 2008	
	Direct Impact	Total Impact
<b>Employment</b> (full-time job equivalents)	37,900	54,500
<b>Resident Income</b> (wages, salaries, and proprietary income)	\$592,500,000	\$1,025,600,000
<b>Government Revenues:</b>		
State government revenues	\$184,300,000	\$277,600,000
Local government revenues	\$45,500,000	\$82,300,000

Table B-5

**Previous Study:  
Summary of Economic Impact Estimates  
June 2005 through May 2006**

**FOR REFERENCE ONLY\***

June 2005-May 2006	
<b>Estimated Traveler Expenditures (\$ in Millions)</b>	
<b>Total</b>	<b>\$2,409.91</b>
<b>Travelers with Paid Accommodations</b>	
Hotels/Motels/B&Bs	\$713.90
Resorts	\$571.88
Campgrounds	\$295.86
<b>Travelers with No Lodging Expenses</b>	
Visiting Friends/Relatives	\$765.61
Day Trippers	\$62.66
 <b>Estimated Travel Volume: Person-Visits (in Millions)</b>	
<b>Total</b>	<b>8.60</b>
<b>Travelers with Paid Accommodations</b>	
Hotels/Motels/B&Bs	2.69
Resorts	0.88
Campgrounds	1.32
<b>Travelers with No Lodging Expenses</b>	
Visiting Friends/Relatives	2.60
Day Trippers	1.10

\* See Appendix A, Section E for details regarding limitations on comparisons of results between study periods (2005-2006 vs. 2007-2008).

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

**Note:** A person-visit is classified in this report as one person on a day trip or one person staying overnight in one accommodation for one or more nights. For example, a couple on a three-night weekend is counted as two person-visits. If a guest to Minnesota travels to many locations in Minnesota, staying overnight in many different accommodations, each overnight stay is considered a person-visit. Therefore, 18.34 million person-visits should not necessarily be interpreted as 18.34 million travelers.

Table B-5 (cont'd)

**Previous Study:  
Summary of Economic Impact Estimates  
June 2005 through May 2006**

**FOR REFERENCE ONLY\***

	June 2005-May 2006	
	Direct Impact	Total Impact
<b>Employment</b> (full-time job equivalents)	41,400	59,300
<b>Resident Income</b> (wages, salaries, and proprietary income)	\$657,300,000	\$1,100,100,000
<b>Government Revenues:</b>		
State government revenues	\$202,700,000	\$297,800,000
Local government revenues	\$62,700,000	\$98,500,000

\* See Appendix A, Section E for details regarding limitations on comparisons of results between study periods (2005-2006 vs. 2007-2008).

**Appendix C:  
Traveler Profile -  
Tables of Significant Differences**

## STATISTICAL DIFFERENCES

### The Profile of Northcentral/West Region Travelers

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

The following is an example of how these tables can be interpreted and used. The proportion of respondents residing in Minnesota during the summer (54%), winter (54%), and spring (62%) seasons was significantly higher than the proportion of respondents residing in Minnesota during the fall (27%).

Table C-1  
**Demographic and Socioeconomic Profile**  
**Statistical Differences by Season**

*2005-2006 and 2007-2008 Combined*

	June-May Total Base: 884	June- August (Summer) 346	September - November (Fall) 204	December- March (Winter) 195	April- May (Spring) 139
	a	b	c	d	e
<b>Average Age</b>	43.1	44.9 cd	41.0	41.2	44.2 c
<b>Estimated Median Income</b>	\$57,800	\$66,800 b	\$40,100	\$54,300	\$69,300 b
<b>Gender:</b>					
Male	49%	47%	48%	47%	58% bd
No Answer	3	5 e	3	4	1
<b>Racial/Ethnic Background:</b>					
Black	3	3	5 d	1	2
White	89	91 c	84	89	96 bcd
No Answer	2	2 de	3	*	*
<b>Residence:</b>					
<u>United States</u>	<u>97%</u>	<u>95%</u>	<u>98%</u>	<u>99% b</u>	<u>99% b</u>
Minnesota	49	54 c	27	54 c	62 c
North Dakota	22	8	48 bde	25 be	10
Iowa	3	6 cde	1	1	1
South Dakota	2	1	2	3 e	1
Other state	11	16 cde	7	7	8
State not specified	9	7	9	9	16 bcd
Canada	2	4 cde	1	*	1
<b>Residence by DMA:</b>					
Fargo-Valley City	32%	14%	65% bde	39% be	20%
Minneapolis-Saint Paul	31	38 c	5	37 c	44 c
Duluth-Superior	3	5 cd	2	1	6 cd
Other DMAs	16	25 cde	12	7	9
No Answer	12	12	11	10	17 d

\* Less than 0.5%

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

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

Table C-2  
**Travel Party and Trip Profile**  
**Statistical Differences by Season**

*2005-2006 and 2007-2008 Combined*

Base:	June-May Total 884	June- August (Summer) 346	September - November (Fall) 204	December- March (Winter) 195	April- May (Spring) 139
	a	b	c	d	e
<b>Trip Purpose (multi-response):</b>					
Vacation or short pleasure trip	76%	85% cd	74% d	59%	80% d
Personal (e.g., wedding, funeral, medical, etc.)	18	12	21 b	27 be	14
Business or work	6	3	5	16 bce	2
Convention or conference	3	2	4	4	6 b
<b>Average Travel Party Size</b>	<b>3.0</b>	<b>3.3 cd</b>	<b>2.9 d</b>	<b>2.6</b>	<b>3.1 d</b>
<b>Average Length of Stay in Nights (Excluding Daytrippers)</b>	<b>3.5</b>	<b>4.6 cde</b>	<b>3.2 d</b>	<b>2.4</b>	<b>2.7</b>
<b>Children in Travel Party</b>					
One or more children under 18	38%	44% cd	31%	29%	45% cd
No children	62	56	69 be	71 be	55
<b>Ages of Children in Travel Party</b>					
<i>6 to 11 years old</i>					
None	80%	73%	89% be	85% b	79%
One or more	20	27 cd	11	15	21 c
<i>12 to 17 years old</i>					
None	83%	81%	84%	88% be	79%
One or more	17	19 d	16	12	21 d

\* Less than 0.5%

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

Table C-2 (cont'd)  
**Travel Party and Trip Profile**  
**Statistical Differences by Season**

*2005-2006 and 2007-2008 Combined*

	June-May Total	June- August (Summer)	September - November (Fall)	December- March (Winter)	April- May (Spring)
Base:	884	346	204	195	139
	a	b	c	d	e
<b>Minnesota Trips in Last 5 Years</b>					
None	4%	6% c	2%	4%	4%
2 to 4 trips	31	29	44 bde	27	24
More than 10 trips	30	27	20	40 bc	39 bc
<b>Estimated Median Trips</b>	<b>6.4</b>	<b>6.4 c</b>	<b>4.6</b>	<b>8.0 c</b>	<b>8.0 c</b>
<b>Lodging:</b>					
<u>Paid Accommodations</u>	<u>70%</u>	<u>74% c</u>	<u>63%</u>	<u>72%</u>	<u>69%</u>
Hotel/Motel/Historic Inn	44	28	56 be	62 be	40 b
Resort	11	23 cde	2	7 c	4
In a tent at a campground	5	5	3	*	12 bc
<u>Unpaid Accommodations</u>	<u>22%</u>	<u>18%</u>	<u>28% b</u>	<u>21%</u>	<u>22%</u>
Home of family or friends	15	10	24 be	16 b	13
At your vacation home/ condo/ cabin/ houseboat	2	3 d	*	1	1

\* Less than 0.5%

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

Table C-2 (cont'd)  
**Travel Party and Trip Profile**  
**Statistical Differences by Season**

**2005-2006 and 2007-2008 Combined**

	June-May Total 884	June- August (Summer) 346	September - November (Fall) 204	December- March (Winter) 195	April- May (Spring) 139
	a	b	c	d	e
<b>Activities:</b>					
<u>General (checked one or more)</u>	83%	79%	92% be	89% be	73%
Dining out	64	60	66 e	77 bce	56
Sightseeing/driving for pleasure	28	32 d	30 d	19	25
Casino gaming	23	22 de	43 bde	10	12
Nightlife/evening entertainment	21	11	32 be	30 be	17
Driving on designated scenic byways	13	16 d	10	10	12
Taking in city sites	12	15 e	10	12	9
Viewing fall colors	6	4	20 b	*	*
<u>Shopping (checked one or more)</u>	56%	51% e	73% bde	57% e	41%
For gifts or souvenirs	33	36 de	43 de	25	23
General or mall shopping	24	19	33be	25	20
Arts, crafts, antiques	15	13 e	20 be	21 be	7
Outlet shopping	12	7	24 bde	9	7
At the Mall of America	7	6 e	18 bde	3	1
<u>Visiting (checked one or more)</u>	66%	69% d	73% d	56%	64%
Friends or relatives	39	32	57 bde	40	32
State or national parks	21	19 d	22 d	6	41 bcd
Amusement parks or carnivals	13	18 de	20 de	3	2
Historic sites	12	13 d	15 d	7	11
Indoor water parks	8	5	13 bd	6	10 b
Other museums	8	6	13 be	8 e	3
Art museums	7	3	16 bde	6 e	2
Indian areas	5	3	11 bde	3	3
Outdoor water parks	4	3	14 b	*	*
Other attraction	6	6	10 de	3	4

\* Less than 0.5%

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

Table C-2 (cont'd)  
**Travel Party and Trip Profile**  
**Statistical Differences by Season**

*2005-2006 and 2007-2008 Combined*

	June-May Total 884	June- August (Summer) 346	September - November (Fall) 204	December- March (Winter) 195	April- May (Spring) 139
	a	b	c	d	e
<u>Participating In (checked one or more)</u>	<u>71%</u>	<u>84% cde</u>	<u>63% d</u>	<u>53%</u>	<u>76% cd</u>
Fishing	28	49 ce	15	*	34 c
Lake/river swimming	20	39 ce	9	*	16 c
Motor boating/water skiing	16	32 ce	6	*	10
Golfing	14	21 c	11	*	19c
Hiking	13	17 cd	10	6	17 d
Biking	11	17 cd	7	3	14 cd
Wildlife viewing or bird watching	11	17 cde	8	5	9
Canoeing	7	11 c	5	*	11 c
Off-road ATV driving	4	4 d	4	1	5 d
Downhill skiing or snowboarding	2	*	1	11 c	*
Snowmobiling	2	*	1	7 ce	*
Cross-country skiing	1	*	*	4 e	1
Other Activity	7	9 c	4	8	6
<u>Attending (checked one or more)</u>	<u>29%</u>	<u>26%</u>	<u>34%</u>	<u>26%</u>	<u>34%</u>
Amateur sporting events	9	6	5	9	20 bcd
Fairs or festivals	8	10 de	9	5	4
Popular music concerts or shows	4	1	9 b	5 b	4
Professional sporting events	4	7 cde	2	*	1
Theater performances	2	1	1	5 bce	1
Other events	8	6	13 be	9	6

\*Less than 0.5%.

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

Table C-3  
Travel Planning Sources

**2007-2008 Only**

	June 2007 – May 2008	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
Base:	403	163	89	94	57
	a	b	c	d	e
Friends/relatives/co-workers	60%	57% e	75% be	62% e	41%
Internet	33	40 c	21	31	36 c
Brochure/travel guide	11	14 e	13	8	5
Other	14	15	7	14	24 c

\*Less than 0.5%.

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

**Note:** This question not included in the 2005-2006 study.

**Appendix D:  
Traveler Profile -  
Tables of 2007-2008 Only Results**

**TABLES OF 2007-2008 ONLY RESULTS**

The Following section includes the Traveler Profile Study results from the data collected during June 2007 through May 2008.

Table D-1  
Travel Party and Trip Profile

*2007-2008 Only*

	June 2007- May 2008	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
<b>Base:</b>	<b>403</b>	<b>163</b>	<b>89**</b>	<b>94**</b>	<b>57**</b>
<b>Age:</b>					
18 to 24	9%	6%	18%	10%	2%
25 to 29	13	8	13	21	11
30 to 39	23	20	24	28	21
40 to 49	22	27	19	14	25
50 to 59	18	19	19	12	21
60 to 64	5	5	*	6	11
65 and older	9	14	4	6	9
No Answer	1	*	1	2	*
<b>Average Age</b>	<b>43.1</b>	<b>46.2</b>	<b>38.8</b>	<b>39.5</b>	<b>46.8</b>
<b>Income:</b>					
Less than \$25,000	14	2	36	22	2
\$25,000 to \$34,999	11	10	15	16	3
\$35,000 to \$49,999	16	20	16	9	17
\$50,000 to \$74,999	20	22	27	13	17
\$75,000 to \$99,999	14	15	4	18	20
\$100,000 to \$124,999	7	9	1	4	13
\$125,000 to \$149,999	3	5	*	3	3
\$150,000 or more	8	10	*	9	16
No Answer	5	8	*	4	9
<b>Estimated Median Income</b>	<b>\$56,400</b>	<b>\$65,000</b>	<b>\$34,600</b>	<b>\$51,000</b>	<b>\$81,800</b>
<b>Gender:</b>					
Male	44	37	42	48	57
Female	51	57	52	46	40
No Answer	5	5	6	6	3
<b>Racial/Ethnic Background:</b>					
White	88	92	78	86	96
American Indian	4	4	4	6	4
Black	3	2	7	2	*
Hispanic	2	*	4	2	*
Asian	1	1	*	2	*
Other	2	1	4	2	1
No Answer	1	2	1	*	1

\*Less than 0.5%

\*\*Small sample size

Table D-1 (cont'd)  
**Travel Party and Trip Profile**

**2007-2008 Only**

	<b>June 2007- May 2008</b>	<b>June- August (Summer)</b>	<b>September- November (Fall)</b>	<b>December- March (Winter)</b>	<b>April- May (Spring)</b>
<b>Base:</b>	<b>403</b>	<b>163</b>	<b>89**</b>	<b>94**</b>	<b>57**</b>
<b>Residence:</b>					
<u>United States</u>	<u>97%</u>	<u>92%</u>	<u>100%</u>	<u>100%</u>	<u>100%</u>
Minnesota	52	53	27	56	80
North Dakota	21	5	57	28	*
Iowa	5	10	1	*	2
Illinois	3	4	6	*	1
Other state	12	16	6	13	5
State not specified	4	5	1	3	10
Canada	3	7	*	*	1
Another Country	5	5	3	3	11
No Answer	*	1	*	*	*
<b>Residence by DMA:</b>					
Minneapolis-Saint Paul	37%	37%	4%	47%	68%
Fargo Valley City	28	6	76	38	*
Duluth-Superior	5	8	1	*	9
Rochester-Mason City-Austin	2	4	*	*	3
Sioux Falls (Mitchell)	2	1	1	3	1
Chicago	2	2	3	*	1
Other DMAs	17	30	10	9	6
No Answer	8	12	3	3	12

\*Less than 0.5%

\*\*Small sample size

Table D-2  
Travel Party and Trip Profile

*2007-2008 Only*

	June 2007- May 2008	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
<b>Base:</b>	<b>403</b>	<b>163</b>	<b>89**</b>	<b>94**</b>	<b>57**</b>
<b>Trip Purpose (multi-response):</b>					
Vacation or short pleasure trip	76%	91%	66%	58%	77%
Personal (e.g., wedding, funeral)	17	5	28	30	10
Business or work	5	2	6	10	3
Convention or conference	5	2	3	5	13
No Answer	*	1	*	*	*
<b>Travel Party Size:</b>					
1 person	13	6	10	30	11
2 people	28	25	30	27	33
3 to 4 people	37	42	40	29	32
5 or more people	21	25	19	14	24
<b>Average Travel Party Size</b>	<b>3.1</b>	<b>3.3</b>	<b>3.1</b>	<b>2.6</b>	<b>3.1</b>
<b>Total Trip Length of Stay:</b>					
Daytripper	2%	1%	1%	0%	6%
1 night	15	12	10	23	16
2 nights	27	10	31	44	41
3 to 6 nights	36	36	45	27	35
7 or more nights	21	41	12	6	2
<b>Average Nights (Excluding Daytrippers)</b>	<b>3.8</b>	<b>5.1</b>	<b>3.5</b>	<b>2.6</b>	<b>2.6</b>
<b>Children in Travel Party</b>					
One or more children under 18	45%	53%	40%	35%	42%
No children	55	47	60	65	58
<b>Ages of Children in Travel Party</b>					
<i>Younger than 6 years old</i>					
None	77%	77%	78%	78%	78%
One or more	23	23	22	22	22
<i>6 to 11 years old</i>					
None	74%	65%	85%	79%	76%
One or more	26	35	15	21	24
<i>12 to 17 years old</i>					
None	83%	79%	81%	89%	85%
One or more	17	21	19	11	15

\*Less than 0.5%

\*\* Small sample size

Table D-2 (cont'd)  
**Travel Party and Trip Profile**

**2007-2008 Only**

	<b>June 2007- May 2008</b>	<b>June- August (Summer)</b>	<b>September- November (Fall)</b>	<b>December- March (Winter)</b>	<b>April- May (Spring)</b>
<b>Base:</b>	<b>403</b>	<b>163</b>	<b>89**</b>	<b>94**</b>	<b>57**</b>
<b>Minnesota Trips in Last 5 Years</b>					
None	3%	2%	3%	3%	4%
1 trip	6	6	12	3	1
2 to 4 trips	35	38	43	34	17
5 to 10 trips	28	35	21	23	25
More than 10 trips	28	19	19	36	52
No Answer	1	*	1	1	1
<b>Estimated Median Trips</b>	<b>6.0</b>	<b>5.6</b>	<b>4.4</b>	<b>7.1</b>	<b>10.5</b>
<b>Lodging:</b>					
<u>Paid Accommodations</u>	<u>78%</u>	<u>87%</u>	<u>70%</u>	<u>69%</u>	<u>76%</u>
Hotel/Motel/Historic Inn	46	29	66	56	47
Resort	18	35	*	12	7
Bed & Breakfast	*	*	1	*	*
Vacation home/condo/cabin/ houseboat you rented	3	4	3	1	4
In a tent at a campground	2	3	*	*	7
In an RV at a campground	8	17	*	*	11
<u>Unpaid Accommodations</u>	<u>21%</u>	<u>11%</u>	<u>28%</u>	<u>31%</u>	<u>18%</u>
Home of family or friends	15	4	27	24	10
Vacation home/condo/cabin/ houseboat of family or friends	4	4	1	5	5
At your vacation home/condo/cabin/ houseboat	2	3	*	1	3
At a campground with no fee	*	1	*	*	*
<u>Day tripper</u>	<u>2%</u>	<u>1%</u>	<u>1%</u>	<u>*</u>	<u>6%</u>

\*Less than 0.5%

\*\*Small sample size

Table D-2 (cont'd)  
**Travel Party and Trip Profile**

**2007-2008 Only**

	June 2007- May 2008	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
<b>Base:</b>	<b>403</b>	<b>163</b>	<b>89**</b>	<b>94**</b>	<b>57**</b>
<b>Activities:</b>					
<u>General (checked one or more)</u>	<u>87%</u>	<u>85%</u>	<u>90%</u>	<u>94%</u>	<u>75%</u>
Dining out	71	68	72	81	65
Casino gaming	26	28	42	15	13
Nightlife/evening entertainment	24	11	36	44	14
Sightseeing/driving for pleasure	23	30	24	17	10
Taking in city sites	13	19	12	8	6
Driving on designated scenic byways	12	19	6	7	7
Viewing fall colors	5	1	19	*	*
<u>Shopping (checked one or more)</u>	<u>57%</u>	<u>57%</u>	<u>78%</u>	<u>53%</u>	<u>35%</u>
For gifts or souvenirs	33	41	39	24	14
General or mall shopping	30	22	51	27	22
Arts, crafts, antiques	16	17	24	14	7
Outlet shopping	13	7	34	8	6
At the Mall of America	8	5	22	2	*
<u>Visiting (checked one or more)</u>	<u>67%</u>	<u>71%</u>	<u>78%</u>	<u>60%</u>	<u>52%</u>
Friends or relatives	40	31	66	42	25
Amusement parks or carnivals	18	27	30	2	2
Indoor water parks	14	9	25	10	21
State or national parks	12	12	22	4	10
Historic sites	10	11	21	4	3
Art museums	7	4	24	1	1
Other museums	6	4	19	2	*
Indian areas	6	3	19	2	*
Outdoor water parks	6	2	21	*	*
Other attraction	12	11	24	6	9

\*Less than 0.5%

\*\*Small sample size

Table D-2 (cont'd)  
**Travel Party and Trip Profile**

**2007-2008 Only**

	<b>June 2007- May 2008</b>	<b>June- August (Summer)</b>	<b>September- November (Fall)</b>	<b>December- March (Winter)</b>	<b>April- May (Spring)</b>
<b>Base:</b>	<b>403</b>	<b>163</b>	<b>89**</b>	<b>94**</b>	<b>57**</b>
<u>Participating In (checked one or more)</u>	<u>79%</u>	<u>92%</u>	<u>69%</u>	<u>56%</u>	<u>94%</u>
Fishing	34	56	16	*	52
Pool swimming	32	34	36	27	29
Motor boating/water skiing	19	41	4	*	10
Lake/river swimming	18	41	4	*	4
Golfing	16	23	15	*	28
Wildlife viewing or bird watching	11	20	6	3	4
Biking	10	18	7	*	8
Hiking	9	14	6	2	10
Canoeing	7	14	4	*	1
Off-road ATV driving	4	2	6	2	7
Jet skiing	4	6	6	*	3
Ice Fishing	3	*	*	13	*
Hunting	3	1	7	1	3
Snowmobiling	2	*	1	7	1
Downhill skiing/snowboarding	1	*	1	2	*
Cross-country skiing	*	*	*	1	*
Other activity	14	16	9	15	13
<u>Attending (checked one or more)</u>	<u>30%</u>	<u>30%</u>	<u>36%</u>	<u>28%</u>	<u>22%</u>
Fairs or festivals	6	11	3	3	1
Amateur sporting events	5	5	3	9	4
Professional sporting events	3	6	1	*	*
Popular music concerts or shows	3	1	6	1	4
Theater performances	1	1	*	2	*
Classical music concerts	1	1	*	*	1
Other events	16	12	27	16	13
No Answer	*	*	*	1	*

\*Less than 0.5%

\*\*Small sample size

Table D-3  
Travel Planning Sources

*2007-2008 Only*

	June 2007- May 2008	June- August (Summer)	September- November (Fall)	December- March (Winter)	April- May (Spring)
<b>Base:</b>	<b>403</b>	<b>163</b>	<b>89**</b>	<b>94**</b>	<b>57**</b>
Friends/relatives/co-workers	60%	57%	75%	62%	41%
Internet	33	40	21	31	36
Brochure/travel guide	11	14	13	8	5
Newspaper/magazine	3	4	*	2	4
TV/radio	3	3	4	1	4
Visitor/welcome center	3	4	4	2	3
Local tourism bureau	2	4	1	2	1
State Travel Office	2	1	1	2	2
Airline/travel agency	1	*	1	1	1
Other	14	15	7	14	24

\*Less than 0.5%

\*\*Small sample size

*Note: This question not included in the 2005-2006 study.*

**Appendix E:**  
**Minnesota Tourism Regions**

**MINNESOTA TOURISM REGIONS**

## COUNTIES WITHIN MINNESOTA'S TOURISM REGIONS

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

**Appendix F:  
Survey Instruments**



## Minnesota 2007/2008 Lodging Managers Survey – Wave 1 (June –August 2007)

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

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

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

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

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

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

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

7. On average, how many nights did a typical guest stay in your property between [June 1, 2007 and August 31, 2007](#)?

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

8. What was the average number of guests staying in one room during the [June 1, 2007 to August 31, 2007](#) time period?

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

9. During the period [June 1, 2007 to August 31, 2007](#), what percentage of your room-nights were rented to guests traveling for...

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

10. Between [June 1, 2007 and August 31, 2007](#), what percentage of your guests were from...

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

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

DBNO: «dbno»	Type: «type»	County: «county»	Q1: «qt r1»	Q2: «q tr2»	Q3: «qt r3»	Q4: «qt r4»	Status: «status»
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## Quarterly Resident Survey -- Minnesota Tourism Study

### Speak to Head of Household:

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

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

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

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

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

- Yes (CONTINUE SURVEY)  
 No (TERMINATE)

Are you eighteen years or older?

- Yes (CONTINUE SURVEY)  
 No (TERMINATE)

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

Over the 3 month period of June 2007 through August 2007, on how many occasions did you have friends or relatives stay overnight in your home for at least one night on non-routine visits?

Number of occasions: \_\_\_\_\_

None [ ]

**Skip to Q.5**

### For Each Occasion:

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

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

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

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

**Start With Last/Most Recent Occasion:**

	<b>Q.2 Month</b>	<b>Q3. # of People</b>	<b>Q4. # of Nights</b>
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			

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

Average # of people: \_\_\_\_\_ Average # of nights: \_\_\_\_\_

**Second Home Section**

5. Do you own a second home used for recreational purposes somewhere else in Minnesota?

Yes [ ] No [ ] **Skip to Q.13**

6. In which county is your **second** home located? \_\_\_\_\_

7. Over the 3 month period of June 2007 through August 2007, on how many occasions did you visit your second home for at least one night?

Number of occasions: \_\_\_\_\_ None [ ] **Skip to Q.13**

**For Each Occasion:**

8. Think about the **last** time you visited your second home. In what month was that? **(Record Below)**

9. Including yourself, how many people in your immediate family visited on that occasion? **(Record Below)**

10. And, how many nights did you stay? **(Record Below)**

11. How many people **other than your immediate family** stayed with you on that occasion? **(Record Below)**

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

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

**Start With Last/Most Recent Occasion:**

	Q.8 Month	Q.9 # of Family Members	Q.10 # of Nights	Q.11 # of Guests	Q.12 # of Nights
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					

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

Average # of **Family**: \_\_\_\_\_ Average # of **Guests**: \_\_\_\_\_

Average # of Nights: \_\_\_\_\_ Average # of Nights: \_\_\_\_\_

**13.** In total, including yourself, how many people live in your household?

**# of people:** \_\_\_\_\_

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

\_\_\_\_\_

**15.** In which county is your home located? \_\_\_\_\_

**Respondent Name:** \_\_\_\_\_

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

**Phone number:** \_\_\_\_\_

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



DPA Use Only

Dear Traveler:

Your visit to our area is very important to us. Please take a few moments to answer the following questions and return this questionnaire to the person who gave it to you. Your responses are very important. Please make your marks INSIDE the boxes or circles. Thank you very much.

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

- 1 Vacation/short pleasure trip
- 2 Personal (wedding, funeral, medical, etc.)
- 3 Convention/conference
- 4 Business/work

2. What source(s) of information did you use in planning your trip? (Please mark all that apply.)

- 1 Internet
- 2 Newspaper/magazine
- 3 State Travel Office
- 4 Brochure/travel guide
- 5 TV/radio
- 6 Airline/travel agency
- 7 Friends/relatives/co-workers
- 8 Local tourism bureau
- 9 Visitor/welcome center
- 10 Other (specify): \_\_\_\_\_

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

**General:**

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

**Attending:**

- 8 Classical music concerts
- 9 Fairs or festivals
- 10 Popular music concerts/shows
- 11 Professional sporting events
- 12 Amateur sporting events
- 13 Theater performances
- 14 Other events

**Participating in:**

- 15 Biking
- 16 Canoeing
- 17 Golfing
- 18 Fishing
- 19 Hiking
- 20 Motor boating/water skiing
- 21 Off-road ATV driving
- 22 Pool swimming
- 23 Lake/river swimming
- 24 Jet skiing
- 25 Wildlife viewing/bird watching
- 26 Hunting
- 27 Cross-country skiing
- 28 Downhill skiing/snowboarding
- 29 Ice fishing
- 30 Snowmobiling
- 31 Other activity

**Visiting:**

- 32 Amusement parks/carnivals
- 33 Art museums
- 34 Other museums
- 35 Friends or relatives
- 36 Historic sites
- 37 Indian areas
- 38 Indoor water parks
- 39 Outdoor water parks
- 40 State/national parks
- 41 Other attraction

**Shopping:**

- 42 For gifts or souvenirs
- 43 Outlet shopping
- 44 Arts, crafts, antiques
- 45 At the Mall of America
- 46 General/mall shopping

4. How many nights **in total** do you intend to stay in either this town or city or the immediate surrounding area on this trip? (Please write in the boxes provided.)

# of Nights in total: 

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5. How many nights have you already spent in this area on this trip? (Please write in the boxes provided.)

# of Nights already spent: 

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

**In paid accommodations:**

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

**In accommodations with no charge:**

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

7. **Not** including this trip, how many times in the **last 5 years** have you taken a pleasure trip in Minnesota?  
 None       1       2 to 4       5 to 10       More than 10

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

# in Immediate Travel Party:

9. How many of those people are...

Younger than 6 yrs old        6-11 yrs old        12-17 yrs old        Adults

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

Spending Category	Amount Spent
a. <b>Lodging and Camping Accommodations</b> (Fee <b>FOR ONE NIGHT</b> ) <i>If you have not paid yet, estimate one night's cost.</i> .....	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
b. <b>Food and Beverages</b> (meals, snacks, groceries, beer/wine/liquor "by the drink") .....	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
c. <b>Liquor Purchases</b> (beer/wine/liquor "by the bottle") .....	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
d. <b>Sport Fees</b> (outfitters, guides, gear rentals, greens fees, lift tickets) .....	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
e. <b>Events Admissions</b> (sporting events, popular concerts, festivals) .....	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
f. <b>Cultural Performance Admissions</b> (tickets for the theater, opera, classical concerts, dance) .....	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
g. <b>Other Evening Entertainment</b> (movies, clubs, lounges, etc.) .....	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
h. <b>Historic/Cultural Site Admissions</b> (historic homes, sites, museums, exhibitions) .....	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
i. <b>Other Sightseeing/Attractions</b> (tours, admissions) .....	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
j. <b>Shopping - Tourist</b> (gifts, souvenirs, antiques, arts and crafts) .....	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
k. <b>Shopping - General</b> (clothing, personal or household items) .....	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
l. <b>Ground Transportation</b> (gasoline, parking, local bus, taxi, car rentals) .....	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
m. <b>Lottery Tickets</b> (scratch-off tickets, Powerball, etc.) .....	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
n. <b>Gaming</b> (gambling and legal betting activity) .....	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
o. <b>Licenses/Registrations/Permits</b> (fishing, hunting, ATV, snowmobile, trail pass) .....	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
p. <b>All other, please explain:</b> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>

Now, a few questions for classification purposes only:

11. What is your age, please?

12. What is your total annual household income before taxes?

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

13. Are you:  <sub>1</sub> Male       <sub>2</sub> Female

14. Are you: *(Please mark all that apply.)*

- <sub>1</sub> American Indian       <sub>2</sub> Asian       <sub>3</sub> Black       <sub>4</sub> Hispanic       <sub>5</sub> White       <sub>6</sub> Other

15. Are you currently a resident of:

- <sub>1</sub> United States       <sub>2</sub> Canada       <sub>3</sub> Another country  
 Current Home Zip Code:

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

Name: \_\_\_\_\_ Phone Number: ( ) \_\_\_\_\_