

TOURISM IN MINNESOTA:
AN ANALYSIS OF MINNESOTA'S POSITION
IN THE MIDWEST VACATION MARKET

FOR

THE MINNESOTA DEPARTMENT OF ECONOMIC DEVELOPMENT

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Completed by
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Preface

This report presents the findings of a study of Midwest Tourism behavior conducted by Thomas von Kuster & Associates under contract with the Minnesota Department of Economic Development. The viewpoints expressed in this report are those of the authors and may not reflect those of the Minnesota Department of Economic Development.

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SUMMARY

This report is the first major study of Midwestern Tourist behavior to be completed in ten years. The study was conducted for the Minnesota Department of Economic Development by Thomas von Kuster and Associates, Minneapolis, from November 1978 to July 1979.

Objectives

The overall objective of the study is to identify the general characteristics of the tourists who vacation in Minnesota and to identify new target market groups. The two purposes underlying these objectives are:

- Assessing Minnesota's competitive position as a vacation destination state; and
- Creating a tool useful for developing a marketing strategy to increase Minnesota's share of the regional tourism market.

Sources of Information

Three major sources of information have been used in conducting the research. First, relevant published studies were sought; this included conducting library searches and requesting pertinent tourism studies from Directors of Tourism and Economic Development in the fifty states. Second, a survey of over sixteen thousand Midwestern families was conducted; this survey involved asking a panel of Midwest families whether they took a vacation in 1978, where the vacation was, how long the vacation lasted, and what the purpose of the trip was. Third, a follow-up questionnaire was mailed to nine hundred families that took a vacation in Minnesota or one of the neighboring states; this survey instrument developed information on the decision process used in selecting vacation sites, the means of transportation, the activities pursued and in many other ways described the vacationers in unique but useful ways that lend themselves to effective marketing activity.

Major Findings

The Approach Provides an Extremely Valuable Set of Information

The research approach meets the objectives and purposes of the study. A unique data base describing Midwest tourists is now available to the State. It is already being used to develop upcoming advertising campaigns for the State and is very helpful in segmenting the tourist market and in describing vacation activities. The information developed will also provide a benchmark for evaluation of the success of any Minnesota vacation marketing strategy.

Contribution of Tourism to the State

The value of tourism to Minnesota's economy and those of other states is great. In fact, Minnesota may depend on tourism more than other Midwestern states. Further, a positive view of a state as a desirable vacation destination will contribute to and enhance the State's overall public and business image.

Number and Types of Families Vacationing

Seventy percent of all Midwestern families take vacations. The number of vacations tends to increase with a family's income, occupational and educational levels. In general, those families living in metropolitan areas also tend to vacation more frequently. This is important since eighty percent of all vacation trips are taken by forty-two percent of the families..

Minnesota's Position in the Midwest Vacation Market

Families in the North Central Region generate about fifteen million vacation trips per year to states in the region and take another fifteen million trips to states outside the region. Minnesota ranks fourth as a vacation destination state in the Midwest with just over thirteen percent of Midwest vacation trips. Michigan and Wisconsin are by far the most frequently mentioned destination states, each having about twenty-one percent of Midwest trips, and together account for over forty percent of Midwest vacation travel. Illinois is third with just over fourteen percent. The other states in the region, Indiana, Kansas, Nebraska, North Dakota, Ohio and South Dakota, divide the remaining thirty-one percent. This is somewhat surprising, since one might expect Wisconsin and Minnesota to be similar in character. It indicates there is room to expand Minnesota's share of Midwest vacations.

Changes in Travel Behavior Since the 1968 Study

The two most interesting changes in Midwest travel behavior since 1968 have been:

- Wisconsin has dramatically increased its market share of vacation trips taken to the three Lake states, Michigan, Minnesota and Wisconsin, from thirty-four percent to thirty-eight percent. Michigan has slipped from forty-three percent to thirty-nine percent. Minnesota has remained stable at twenty-three percent.
- Shorter trips are becoming more popular. Weekend (one to two days) trips to Minnesota, which were six percent of all trips in 1968, now account for sixteen percent of these trips. And trips of five days or less amounted to forty-seven percent of all vacations to Minnesota in 1968; now "5 days or less" vacations are sixty-four percent of trips to the State. These trends imply changes in vacation activity since 1968 that are important for the State's vacation marketing activity.

Purposes of Vacations in Minnesota and Other Midwestern States

Visiting family and friends is the most frequently mentioned purpose for vacations in Minnesota and the Midwest. Minnesota is above average in Metro-sightseeing. However, the State is surprisingly below average in non-Metro sightseeing as an activity. This is especially unusual when one finds that the leading activities are outdoor activities like fishing, being at the beach, swimming etc.

Vacation Promotion in the Midwest

Minnesota lags the other Lake states, Wisconsin and Michigan, in attracting visitors who attributed reasons for their trips to advertising, promotion and newspaper articles.

Characteristics of Minnesota Vacationers

Minnesota is below average in attracting families, young couples, professionals and first-time visitors. It is above average in attracting retirees, working older couples, small groups of travelers and repeat visitors.

Reasons Why People Do Not Come to Minnesota

The two major reasons why families do not travel to Minnesota are that they are unfamiliar with the State or that they are not interested in Minnesota generally. These can be overcome.

Recommendations

Advertising and Promotion

- More advertising and promotion of Minnesota vacations should be undertaken to overcome the lack of information about the State among Midwest vacationers. One area where efforts should be concentrated is in developing "free" publicity, i.e. newspaper and magazine articles about Minnesota. This is an effort where Minnesota lags behind other states in the Midwest. Thus, continuing the sponsorship of writers' trips to the state is encouraged, and these should be expanded. These articles could expand general interest and excitement about Minnesota as a destination state.
- Themes for advertising should seek to attract the first time visitor emphasizing not only currently popular activities in Minnesota, but also those activities and amenities known by Minnesotans but not frequently mentioned by vacationers to the state like golf, tennis, non-metro sightseeing, historic sites etc.
- Active vacations for younger vacationers should be promoted. The current group of older vacationers which has been coming to Minnesota for many years started as young vacationers and they must be replenished if Minnesota is to maintain its market position.

Market Segments to be Approached

- Minnesota should be able to attract a larger share of these groups of vacationers:
 - Young travelers
 - Families (more go to Wisconsin or Michigan)
 - Convention goers (more go to Wisconsin)

Facilities and activities would appear to be available to serve these groups, but Minnesota attracts these groups at a below average rate versus the other lake States.

- Travel agents would be a good market. Each agent works with many vacationers. More travel/tour packages could be made available since few travelers coming to Minnesota use them and, of 278 trips to Minnesota examined, none used a travel agent for planning. Travel agents also may provide the State with a link to the valuable first time visitor. Aiming at travel agents requires coordination with hotel/motel resort owners who provide vacation facilities and commissions. Some study by the State about how they may help link travel agents to Minnesota vacations will be necessary.

Timing of Vacations and Promotions

- Minnesota can extend its vacation seasons over the long term by judicious use of publicity and promotion. Decisions to come to Minnesota occur year round while travel is concentrated in the summer and fall months.

Thus, it may make sense to reinforce some seasonal travel by "cross seasonal" advertising, i.e. advertising not only winter activities in the winter but reminding vacationers of summer or spring vacation opportunities. This may better influence the planning that goes into vacations of 5 days or more which are 36% of all trips. These are important trips for which people plan ahead.

- The short spur of the moment trips usually are decided upon in the month they are taken. For this the State should use short "menu type" advertising in the papers and perhaps on radio stations within the state (and in nearby border communities), which lists events and places to go. Buying advertising space or time in bulk and reselling it to communities can be money saving and give the State consistency in quality and appeal. This is being done successfully and should be continued, but one should tie the advertising together graphically or thematically so the reader can see all these activities are in Minnesota, not some other state.

Minnesota Vacations and Differentiation From Those in Other States

- Vacation activities and facilities in the Lake States --- Minnesota, Wisconsin and Michigan -- and other Midwestern states as noted above are not dramatically different. To make Minnesota a unique and preferred destination can be done but it will require coordinated efforts among all the diverse elements of the tourist industry in the State. Cooperative advertising efforts mentioned above are a good beginning.
- Minnesota provides a wider range of vacation activities than most destination states; from a very sophisticated metropolitan area to remote wilderness, from elaborate resorts to simple campgrounds. Thus, the State can appeal to a wide variety of vacationers by offering many unique activities -- The Minnesota Orchestra, Guthrie Theater, county and state fairs, gourmet dining, or panfried fish by a North woods campfire. A blend of the exciting/unique and the ordinary/relaxing makes an ideal vacation. The State's advertising function must be like a cook book providing the recipes made up of specific Minnesota ingredients to create vacations to taste, i.e. the active vacationers need sailing, tennis at these locations...; sports enthusiasts will enjoy the Twins, Vikings, Gophers, Brainerd racing etc.; those interested in culture can find theater, museums, music etc.
- Minnesota's information services to potential vacationers have been very well received by critics. The State was one of five states to get excellent ratings for promptness of response and completeness of information. Even though in 1978, fewer people coming to Minnesota versus other states sought state information for their trips to the State, Minnesota should continue to provide excellent service to its customers. If promotional efforts expand, Minnesota's responsiveness will become more important especially for first time Minnesota vacationers.

Dealing With the Energy Shortages and Inflation

This year inflation and gasoline shortages are key concerns of vacation travelers. While not dealt with directly by this study many of the findings in this report are important to determining their impact on vacation travel.

Some conclusions and recommendations include:

- A higher proportion of Minnesota vacationers enter the state by recreational vehicle (RV) than other states. Facilities and activities depending upon this group will likely be hurt by the gasoline shortage, i.e. campgrounds dependent on RVs. Not much can be done to change this except to announce gasoline's availability which is being done.
- Minnesota vacations are not expensive. Minnesota is only one day's drive from several population centers. Further, scheduled air service to Minnesota is available. These aspects of cost and accessibility are favorable and should be emphasized for the remainder of the summer and into the fall. In addition, downhill skiing has become very expensive, while cross country skiing has remained reasonably priced. Opportunities this winter will occur to further expand the cross country (and perhaps snowmobile) vacations at State resorts.
- Major cities and downtown retailers will most likely not experience a drop in tourist trade because they are close to airports, hotels, rental cars and many gasoline stations. Thus, selling the State's major population centers and their activities for vacations ought to be a good strategy, especially since Minnesota's major cities already offer not only urban activities, but also many resort like amenities such as Lake Superior, the St. Croix and Mississippi Rivers and many nearby lakes.
- Remote areas of the State (accessible by car only) will require announcing of gasoline availability and local activities that will make travel to those areas desirable in spite of any difficulties.
- Resort areas may wish to cooperate and promote non gas using activities and modes of transportation -- sailing, canoeing, biking etc. As with fishing or tennis these will require instruction for novices. For example, Wisconsin and other states have developed and promoted bike trails using abandoned railroad right of ways in resort areas. This might be useful in Minnesota.
- People will continue to vacation during the gasoline shortages. Those states that maintain their market share in the short run will keep tourists informed and provide guarantees of help to stranded vacationers. Over the long term, if the gasoline shortages continue or if prices continue to rise dramatically those states offering 1. other means of access beyond automobiles, 2. innovative and desirable vacation activities not gasoline related, 3. cooperative and consistent marketing approaches, and 4. perceived value for each dollar spent on a vacation, will maintain their market shares.

METHOD OF APPROACH

This chapter contains two main sections. The first section reviews the secondary data collection phase of our information gathering procedure. The second section describes our primary research and data collection phase. Each discussion of these phases includes the following components:

- (1) The objectives of the data collection method.
- (2) The approach to the data collection method.
- (3) The source(s) of information.
- (4) A discussion of each method's effectiveness as a data collection method.

Secondary Data Collection

The first task in our data collection procedure was to collect pertinent tourism information from state, federal, local and private sources. The purpose of this task was to provide data on the state-of-the-art as regards tourism marketing generally, and the North Central states region in particular. This information was used to develop our primary data collection process (a survey questionnaire and experimental design) which in turn maximized the utility of the survey results.

This literature search phase of our data collection was not conducted to produce any direct conclusions about the current and potential tourist market in Minnesota. Rather, the secondary data was used to generate impressions about current and potential market conditions which we attempted to verify directly by additional primary data collection.

Objectives of Secondary Data Collection

The following objectives served as guidelines in our secondary source search:

- (1) To collect sufficient information on the tourism industry to accurately describe the industry's current marketing practices.

- (2) To review the tourism studies and develop a refined research methodology -- one that employs successful techniques and avoids those that are found to be inaccurate or unproductive.

Approach to Secondary Data Collection

The task of collecting tourism literature of a secondary data nature was completed in four phases:

- (1) Contact was made and information was secured when possible from all appropriate public and private sources.
- (2) Minnesota's, the North Central Region's and national tourism marketing activities over the past ten (10) years were reviewed.
- (3) The 1968 Minnesota Tourism Market Analysis was studied carefully.
- (4) These three phases were evaluated and synthesized into a detailed survey research design and analysis plan for use in the remainder of the study.

Sources of Secondary Data Information

The following sources were contacted for secondary data tourism literature. Information was secured from those sources highlighted with an asterick (*).

1. *State departments of tourism.
2. *State offices of the U.S. Department of Commerce.
3. *The U.S. Travel Data Center, Washington, D.C.
4. Federal Reserve Banks.
5. *Private research agencies and academic institutions.
6. *Private for-profit or non-profit corporations (such as airline industry, AAA, travel agencies etc.).

A complete bibliography of literature reviewed in this phase of the research project can be found in Appendix A.

Secondary Data as a Source of Information

Advantages. Any complete research project begins with a thorough scan of secondary sources. This scan is conducted to benefit from information already collected for related topics, and to avoid duplication of research efforts.

Specific advantages of secondary data as a source of information include:

- (1) Secondary data is more economical to obtain than primary data.
- (2) Secondary data is relatively easy to obtain.
- (3) Secondary data is more rapidly obtained than primary data.
- (4) The information may be so unique that it can only be obtained using this method of data collection. (For example, the Bureau of Census will gather information from the private sector of the tourism industry that would not be divulged to anyone else.)

- (5) The major utility of past research compiled in secondary sources (unless the methodologies employed are parallel) comes from the availability of "impressionistic" data which permits hypotheses to be formulated and trends to be verified.

Disadvantages. As is the case with any data collection method, secondary data as an information source has its drawbacks or limitations. These limitations include:

- (1) The accuracy or quality of information which is available from secondary sources is largely unknown.
- (2) Such studies almost never lend themselves to one another for analytical purposes. This is due to:
 - a. Variation in units of measurement. (For example, measures of income may be made using "per household" as the measurement criteria while others use "per family" or "per person", etc.)
 - b. Variation in construction of classes. (For example, one study may use age classes of less than 20, 20 - 30, more than 30 years, while another study measures age with classes of less than 25, 25 - 40, and more than 40 years.)
- (3) Although less significant in this report, it is also important to consider the timeliness or currency of information. Because part of our objective is to establish trends in Minnesota tourism marketing activities, this limitation is not as applicable.

Primary Data Collection

The second task in our data collection procedure was to identify the geographic location and demographic characteristics of persons pursuing "Minnesota Type" tourist activities in the region surrounding Minnesota. Two necessary requirements had to be met in our primary data collection. First, representative samples had to be drawn from each area within the region such that extrapolations about current and potential size of market, market share, etc. could be accurately made. NFO's geographic representation assured us of reaching this goal. Second, the specific descriptors chosen to measure the geographic, demographic and behavioral characteristics had to be appropriate. Information gathered in the secondary data phase helped us carefully select the best descriptors.

Objectives of Primary Data Collection

The primary data collection served to provide information on the entire regional tourism market, and Minnesota's place in it.

More specifically, the following objectives served as guidelines in our primary data collection:

- (1) To evaluate Minnesota's competitive position in the tourism industry.
- (2) To describe tourists (both those "captured" and "lost" from the perspective of Minnesota's tourist industry) in the region in terms useful for marketing decision making.
- (3) To develop a marketing strategy or plan which will:
 - a. Identify target groups of potential Minnesota tourists.
 - b. Suggest potential successful ways of reaching and appealing to these groups.

Approach to Primary Data Collection

The task of collecting primary data on vacationing and tourism in the North Central Region was completed in two mail survey phases or stages.

- (1) The first mail survey secured data on the extent to which the family or individual family members have taken or are planning vacations.
- (2) The second survey focused on those respondents who acknowledged taking "Minnesota type" vacations.

NFO: Source of Primary Data Collection

Sampling Method. National Family Opinion, Inc. (NFO) of Toledo, Ohio, provides an interview panel of families throughout the United States. These families are matched in principal demographic characteristics to all families in the United States. The national panel is subdivided into regional panels, corresponding to the principal census regions of the United States. The regional panel for the North Central Census Region,¹ which corresponds closely to the natural market area for Minnesota vacationers, contains 22,000 families. These families are sampled four times per year (January, April, July and October) by means of a Multicard, a standard-size punched card with space for three or four questions and answers. Clients of NFO provide questions that are reproduced on a Multicard, added to those

¹The North Central Census Region consists of twelve states: Ohio, Indiana, Illinois, Michigan, Wisconsin, Minnesota, Iowa, Missouri, North Dakota, South Dakota, Nebraska and Kansas.

from other clients, and mailed to panel members. The panelists fill out and return the Multicards, which are tabulated by NFO or its client.

One of the main reasons for using the NFO Multicard service is to learn more about the consumer behavior of a large, representative sample of American families. More detailed information can be obtained in addition to the answers provided on the Multicard, however. If a portion of the NFO panel families indicate some behavior in which the client is particularly interested (such as a vacation in Minnesota), followup questionnaires may be mailed to this group with a request for additional information.

Survey Instruments. The Multicard utilized in this survey obtained information on the responding family's four most recent vacations during the year December, 1977 through November, 1978. Specific information sought included the month and year of the vacation, the destination state(s), the number of nights away (a minimum of one night was set), and the main purpose of the vacation. A copy of the Multicard can be found in Appendix B.

The Multicard served two important functions: first general vacation behavior data was gathered and second the Multicard served as a screening device for a subsequent mail questionnaire. (See "Timing of Surveys", page 6 for screening criteria).

The followup questionnaire, which can also be found in Appendix B, gathered more specific data on vacations and tourism. This survey instrument developed information on the decision process used in selecting vacation sites, and described the vacationers in unique but useful ways that lend themselves to effective marketing activity.

In addition to data on recent/planned tourist activities, the following information will be available to categorize respondents:

1. Location: State, country, SMSA and ADI (television market designation)
2. Family size and composition.
3. Age: Head of household and spouse.
4. Education.
5. Occupation.
6. Income.
7. Type residence (and ownership).
8. Race.
9. Socio-economic class.

Information obtained will also include zip codes (which will not be utilized in the report) and some lifestyle information, which includes respondent ownership of a boat, motorcycle, snowmobile, motor home, tent camper, and travel trailer.

Timing of Surveys

The original plan for the timing of the Multicard and followup surveys consisted of: (1) a December mailing of the multicard survey, (2) a quick hand sort of respondents into followup and non-followup samples, and (3) a January mailing of the second and more complete survey questionnaire.

A new plan, based on the State's data requirements, was developed following the December mailing of the Multicard survey. The new plan called for and utilized a computerized sample selection method. The selection method consisted of four criteria the Multicard respondent had to meet before being selected as a member of the followup survey. The four criteria are:

- (1) The family trip(s) must have been for some other purpose than to visit family or friends.
- (2) The family trip(s) destination(s) must have included one of the following states: Iowa, Minnesota, North or South Dakota, Wisconsin, and for Illinois residents, a destination of Michigan. Also included as acceptable destinations were Manitoba and Ontario, Canada.
- (3) The family trip(s) must have lasted either (a) a weekend or three days, or (b) five days or more.
- (4) The family trip(s) must have fallen in the time span of December, 1977 -- November, 1978 for the multicard survey and January, 1978 -- December, 1979 for the followup questionnaire.

Although the followup questionnaire survey was delayed by three months because of the new selection method, the delay served to improve significantly the reliability of the followup survey's sampling process.

Sample Size

The multiscard was sent to 16,500 families in the NFO panel. The response rate was 84 percent, or a return of 13,807 completed and usable multiscards. Of these multiscards, 6,342 indicated that at least one family vacation's destination was one of the nine states/provinces necessary for the followup survey. (See Table 1 for Sample Sizes).

Of these 6,342 total families, the respondents were further classified by length of stay on the vacation. The two categories of importance for the followup survey were "three day only other than family visit" and "five days or more other than family visit". As the table indicates, 795 respondents qualified for the "three day" vacation and 1710 qualified for "five days or more".

These total samples were then randomly sampled and followup surveys were sent to 903 out of the 2,505 qualifying vacationers. This results in a 95 percent certainty of being within \pm 10 percent accuracy. Additional respondents were sampled in cases of special interest or when sample universes were very small. The followup questionnaire received a response rate of 75 percent.

Panel Surveys as a Source of Information

Advantages. Primary data collection during both the multiscard and followup surveys will be accomplished by NFO, using questions developed by Sippel, von Kuster. This organization, National Family Opinion, Inc., represents the finest large-scale panel survey service available today.

Specific advantages of such panel surveys include:

- (1) Panel surveys provide representativeness of the entire population. They provide the same actionable results as a probability sample (one in which measurement error can be calculated) without the prohibitive cost. NFO specifically provides "up to date geographic representation".
- (2) Panel surveys are conducted within a short completion time.
- (3) Panel surveys provide the ability to measure change over time. This will be particularly useful, because this tourism study will provide information and a framework for future tourism studies. In essence, a data base has been established.

TABLE 1
TABLE FOR SAMPLE SIZES*

STATE	TOTAL FAMILIES TAKING VACATION IN STATE	THREE DAY TRIP ONLY OTHER THAN FAMILY		FIVE DAYS OR MORE OTHER THAN FAMILY	
		TOTAL	SAMPLE	TOTAL	SAMPLE
IOWA	525	102	50	99	49
MINN.	1,113	179	92	422	100
N. DAK.	119	17	17	19	19
S. DAK.	287	39	39	118	53
WISC.	1,853	336	95	636	100
MAN.	10	0	0	4	4
ONT.	158	41	37	63	38
CANADA	405	48	32	241	69
MICH.	1,872	33	33	108	76
TOTAL	6,342	795	395	1,710	508

*Based on 95 percent certainty of being within ± 10 percent. Total sample size at this confidence level is 789. An additional 114 were added to sample sizes in amounts indicated below.

Minnesota (three day)	29
Minnesota (five day)	21
South Dakota (three day)	3
Wisconsin (three day)	20
Wisconsin (five day)	16
Michigan (five day)	25

- (4) High response rates are obtained through panel surveys. NFO guarantees an 80 percent response rate. Acceptable response rates for a non-panel mail survey are approximately 25 - 30 percent.

Two additional advantages which are true for all mail questionnaires include:

- (5) Mail surveys reduce the possibility of interviewer bias or misinterpretation of results.
- (6) Mail surveys increase the chance of well thought out answers, because the respondent answers at his/her leisure.

Disadvantages. Again, every form of data collection has limitations that must be considered. Mail surveys in general account for the first, while the second limitation follows directly from panel surveys.

- (1) Members of the panel who do not respond may differ significantly from those who do respond, and therefore they may distort the results. A statistical comparison of the demographic characteristics of the non-respondents and the respondents showed them to be similar. This minimizes further concern of bias, as it suggests that vacation behavior of the respondents is probably typical of the entire NFO panel.
- (2) The panel respondents may become "experts" in survey responding, and they may in turn become different from the population. NFO has carefully attempted to eliminate this potential by rotating families every two years. At least one half of the respondents have not served on active balanced panels in the last two years.

BACKGROUND

Prior to discussion of the current tourism study and the results obtained from the surveys, it is important to review what has been studied in the past. Previous tourism studies will provide information regarding what kinds of studies have been conducted, which institutions have sponsored the research, what information the studies sought and obtained, and what the trends are in tourism. With this knowledge, the current study can be more accurately assessed as to its validity in both measurement and content; and the established trends can be extended to include current data.

Tourism Research Summary

Tourism has been traditionally studied using one of five methods of data collection. These five kinds of tourism study which are used as a means of categorizing completed research are control point, on-site, household, business and historical studies. Although approached from these different methods of collecting data, the information sought has been fairly standardized. The main topics that most tourism research has covered are:

1. State of origin
2. Mode of transportation
3. Type of overnight accomodation
4. Size of the tourist party
5. Average length of stay
6. Total expenditures
7. Reason for visit

These seven are by no means exhaustive in terms of what has been studied in recent years, but the list does provide a convenient foundation from which to work.

Kinds of Tourism Research

Definitions of the aforementioned research methods are provided below.⁶ Examples of data collection using each method are also provided to clarify each technique.

Control Point. Using control point research, vacationers are questioned as they enter or leave a state by principle modes of transportation -- automobile, boat, bus, plane or train. Examples of data collection using this technique are personal interviews conducted at airport terminals or questionnaires distributed at highway rest stops to be returned upon the trip's completion.

On-site. The on-site collection method can be broken down into two main types. The first type collects data at the vacationer's place of lodging, such as campground, trailer camp, motel, hotel or resort. A weakness of this method is that vacationers who are lodging with friends or relatives are not sampled and results may not be generalizable. The second on-site type collects data at major assembly points within the state, such as natural or manmade attractions for sightseers, recreational facilities or important waterways for canoeists, hikers or fishermen. Again, data can be collected through personal interviews or other surveying instruments, the questionnaire being the most common.

Household. There are two main populations to be sampled using the household technique in tourism research. The first population would include those households thought to be representative of the population at large. An example of this group is the members of the National Recreation Survey, approximately 3900 individuals from throughout the United States who are interviewed in each of the four seasons. National or regional mail panels are another example of samples thought to be typical of the entire population.

The second population sample would include households or individuals who are familiar with some aspect of tourism or whose names appear on an available vacationer list. Examples of these groups are fishing or hunting license holders or families who have written in for available state tourist information.

Business. This method involves surveying businesses that are directly or indirectly involved in the tourist trade. This would include restaurants, lodging establishments, and rental agencies (cars or equipment). The primary function of the business method of data collection is to estimate gross tourist expenditures in a state or area. The typical procedure entails obtaining receipts and allocating them between tourist and non-tourist categories.

Historical Studies. The primary source of historical data is the Census of Business data, which again is used to estimate gross tourist expenditures in a state. This method suffers from the problem of timeliness.

This is true with most census data. Data collected in 1970 may have little practical application in 1979, for example. Also placed in this category are any other previously conducted tourism studies. These studies are especially helpful in trend projection, although the standardization of terms is necessary for the accuracy and validity of trends. For example, "length of stay" is currently measured in number of nights away from home. Some studies use number of days away from home. This can cause interpretation problems and must be limited as much as possible.

Tourism Study Summary

Tourism has become a multi-billion dollar industry in the United States. An ever increasing number of families are choosing to spend their leisure time and discretionary income on the pursuit of travel and tourism. To

capture larger portions of this traveling segment in our population, individual states have been studying their respective tourism industries. Results of these studies are intended to provide each state with a better understanding of its current offerings in the area of tourism, how well these offerings are being utilized, where strengths and weaknesses exist, and an idea of how to increase the effectiveness of the state's promotional efforts.

The Big Four

In 1966, Gallup International, Incorporation conducted a nationwide poll, creating the Gallup Domestic Vacation Travel Index.³² This index summarized attitudes toward vacationing in each of the fifty states and the public's image of the "ideal vacation." Within this study, respondents were asked to indicate the states that they "would like to visit or re-visit SOMEDAY on a vacation" (Gallup, Pg. 3) The four states that people wanted to visit or re-visit were California, Florida, Hawaii and New York, at 67, 59, 58 and 48 percent of the respondents, respectively. (Minnesota ranked twenty-second, with only 21 percent of the respondents indicating a desire to visit or re-visit Minnesota.)

The most logical place to begin a discussion of tourism study is with these four states who proportionately reap most of the benefits of travel and tourism in the United States. Presumably, because these four states rely so heavily on the tourism industry, a clear understanding of their respective portions of that industry would be of unquestionable importance to them. Indeed, many assume that studies conducted by these states would be the most professional and complete; in essence, landmark studies. Without entirely subscribing to this theory, a review of the studies sponsored by these states will be presented. These studies, along with others from the Midwestern states, will then be used as a reference point from which a

comparison of Minnesota's tourism studies can be made. The current study will also be analyzed using these studies as guidelines for appropriateness and consistency. Table 1 summarizes the studies by location and data collection method, including an indication of who sponsored the research (the government or a private agency) and who carried out or conducted the research (a private agency or a department within the state's University).

California. As indicated in Table 2, the study of California reviewed is a control point study. Data for this study was collected from persons leaving the state by airplane or automobile. The study was sponsored by the California State Office of Tourism and Visitor Services, and it was conducted by a private research agency. Table 2 also indicates that the seven major topics are not entirely covered in the analysis of tourism by California. The state of origin, the mode of transportation, the type of overnight accommodation, the site of the tourist party and the average length of stay are all examined, while total expenditures and reason or purpose of visit are not. Additional topics are discussed, however, and these include research into destinations within the state, such as recreational areas and activities, the number of times vacationers had been in the state before, and an attempt to estimate the financial impact the tourism industry has upon California. This report is by no means the only report that the California state has sponsored, but it is representative.

The seven main topics of interest in research of tourism are summarized in Travel Trends in the United States and Canada, and data for the four major tourist states and Minnesota are presented in Table 3. The primary mode of transportation to California is the automobile, yet air travel is a strong second mode. The majority of vacationers stay at hotels, motels, campgrounds or trailer parks; however, a sizeable portion (37%) stay at friends and relatives while vacationing in California. The most

TABLE 2

DATA COLLECTION METHOD AND TOPICS OF INFORMATION SOUGHT
BY LOCATION OF INTEREST AND AGENCY CONDUCTING RESEARCH

Data Collection Method	Location of Interest											
	California 67	Florida 68	Hawaii 75	New York 66	Illinois 34	Wisconsin 60-64	Iowa 37-43	Hawaii and South Carolina 48	Minnesota ¹	Minnesota 31	Minnesota 9-13, 22, 24	The Current Study
Control Point	By: P					By: G		By: U				
	For: G					For: G		For: U				
	No					Yes		No				
	+					+		+				
On-site				By: P		By: G	By: G					
				For: G		For: G	For: G					
				Yes		No	No					
				+			+					
Household						By: G		By: U	By: U	By: P		By: P
						For: G		For: U	For: G	For: G		For: G
						Yes		No	No	Yes		Yes
						+		+	+	+		+
Business		By: U			By: G	By: G					By: G	
		For: U?		above--	For: G	For: G					For: G	
		No			No	Yes					No	
		+		Same as above--	+	+					+	
Historical Studies								By: U	By: U			By: P
								For: U	For: U			For: G
								No	No			Yes
								+	+			+

Each cross-tabulation will indicate the agency conducting/sponsoring the research and whether or not the research covered the seven main topics of interest. Additional topics covered will be indicated with a (+) and discussed in the text.

(P = Private firm, G = State government, U = State university.)

TABLE 3

SUMMARY OF MAIN TOPICS OF RESEARCH BY STATE^a

Main Topics of Research		State				
		California	Florida	Hawaii	Minnesota	New York
State of Origin		NA	NA	NA	NA	NA
Mode of Transportation	Air	36%	18%	98%	9%	12%
	Auto	64	80	0	85	79
	Bus	0	1	0	4	5
	Rail	0	1	0	2	3
	<u>Ship</u>	<u>0</u>	<u>0</u>	<u>2</u>	<u>0</u>	<u>1</u>
	Total	100%	100%	100%	100%	100%
Type of Overnight Accommodation	Hotel/Motel	56% ^b	41%	85% ^c	48% ^d	36% ^e
	Campground/Trailer Park		6		20 ^f	16 ^g
	Friends/Relatives	37	20	12	30	42
	<u>Relatives</u>	<u>7</u>	<u>18</u>	<u>3</u>	<u>2</u>	<u>6</u>
	Total	100%	100%	100%	100%	100%
Size of Party		2.1 persons	2.9 persons	1.6 persons	3.4 persons	3.6 persons
Average Length of Stay		7 days	12.4 days	8 days	6.2 days	10.5 days
Total Expenditures (per person)		\$168 (per visit)	\$157 (per visit)	\$41 (per day)	\$65 (per visit)	NA
Reason for Visit		NA	NA	NA	NA	NA

a. Source Travel Trends in the United States and Canada, 1973

b,c. Includes hotels, motels, campgrounds and trailer parks.

d,e. Includes hotels, motels

frequent size of the party is two persons, staying an average length of seven days. Total expenditures per person per visit are approximately \$168. Information on state of origin and reason for visit were not available from this source.

Florida. Referring back to Table 2, the study about Florida's tourism industry being reviewed used the business method of data collection. The report combines the number of visitors in the state, the per capita income, the population, the costs of travel, the substitute vacations available and the current economic conditions to formulate a mathematical statement that attempts to predict the demand for tourism within Florida. There is no discussion of the seven major topics per se; the demand equation is the focus of the research. This study was conducted by two researchers in the Economics Department of Old Dominion University, presumably for their own purposes, (there is no mention of state or public sponsorship.) Again, this report is only one of many that has studied Florida's tourism industry.

Table 3 presents the data results of the seven main topics in Florida. Eighty percent of Florida's vacationers arrive via the automobile; air travel is a distant second in popularity. Hotels are the most frequently used overnight accommodations in Florida, friends and relatives are used only half as often as was found in California. The average size of the party was three persons, staying in Florida for almost two weeks (12.4 days). The cost of the vacation in Florida cost almost \$11 less than California's, at approximately \$157. State of origin and reason for visit again were not available; no figures were included for any of the states.

Hawaii. Table 3 indicates that 98% of all travellers or tourists use air travel as their mode of transportation to Hawaii; the remaining 2% being ship or water travel. This is obviously necessitated by the nature of

Hawaii's geographic location. The largest portion of tourists stay at hotels, motels, campgrounds or trailer camps. Only 12% stay at friends or relatives, this is almost half again or one-fourth of what California's lodging statistics indicate. The size of party in Hawaii is the smallest of the five states presented in Table 3, ranging from one to two persons almost equally. The average length of stay is eight days.

New York. The study summarized in Table 2 regarding New York's travel-tourist industry is actually a composite of two data collection techniques; both on-site and business research methods are utilized. The study was prepared by a private research association for the New York State Department of Commerce. Not only does the New York tourism study cover the main seven topics of interest, it also covers the additional topics of destination, when a vacation occurs, where the vacation occurs (urban, suburban or rural), the number of times the visitor has been in New York, whether the visitor would travel to New York again, and which recreational activities or areas were utilized on the vacation. All of these topics were discussed within the focus of creating a tourism plan for New York.

Table 3 again presents more specific data regarding travel in New York. The primary mode of transportation (79%) is the automobile, with air travel, bus, rail and ship having decreasingly less influence, respectively. The most often used overnight lodging is friends and relatives homes (42%), although hotels and motels are also frequently used (36%). New York's visiting parties are larger than any of the others, at somewhere between three and four persons per group. This could indicate families vacationing together and would coincide with more vacationers staying at friends or relatives, which would be more economical for the larger groups. The average length of stay is about a week and a half. No figures were available from this source on what the total expenditures per person are per visit.

The Midwest

Another important group of states to examine in the area of tourism research is that of the Midwestern states. Because these states are all located within the same geographic area, they must compete for the same vacationing segment of the market. Minnesota must be aware of what its competition is doing to maximize their market shares, or their portions of the tourist population. With this awareness, Minnesota can: (1) Use the research studies as guidelines for its own research; (2) Use the results to learn more about vacationing habits of the Upper Midwest; and (3) compare its tourism industry to that of other Midwestern states and determine its strengths and weaknesses.

The states that are included in the Midwest or North Central Census Region are Ohio, Michigan, Indiana, Illinois, Wisconsin, Iowa, Minnesota, North Dakota, South Dakota, Missouri, Nebraska and Kansas. Research studies of Illinois, Wisconsin, and Iowa will be presented to be used as additional reference points for comparison, along with the "Big Four".

Illinois. The state of Illinois is ranked as 27th according to the Gallup Domestic Vacation Travel Index measurement of which states people would like to visit or revisit someday. Only 19% of the respondents indicated that Illinois would be on their travel agenda. Yet, tourism is still important to Illinois, especially in the Chicago and surrounding metropolitan areas. The study summarized in Table 2 used the business method of data collection. The report was prepared by the Office of Tourism within the Department of Business and Economic Development.

The topics that are covered in this research study are mode of transportation, type of overnight accommodation, and total expenditures from the main seven, while state of origin, size of tourist party, average length of stay and reason for visit are not discussed. Additional topics that are

discussed, however, include where within the state people are vacationing, and what influenced the decision to vacation at that location. This analysis does not appear as complete as those of California and New York.

Wisconsin. Wisconsin is ranked 24th in Gallup's "Travel Index", 20% of the population wanted to visit or re-visit Wisconsin. Among the Mid-western states, however, Wisconsin is a popular vacation spot and it depends upon tourism economically. The Department of Resource Development in the State of Wisconsin put together a five-report series on tourism in Wisconsin. This report, summarized in Table 2², is part of a Wisconsin Development Series published in 1966. The report makes good use of the available research methods for data collection in the tourism industry.

The five part series examines several phases of tourism: "Wisconsin and the Vacationer",⁶⁰ "Commercial Enterprises Providing Tourist and Travel Accomodations",⁶¹ "The Economic Impact of Recreation",⁶² "The Outdoor Recreational Plan",⁶³ and "Private Seasonal Housing".⁶⁴ The data collected in the first report was obtained through use of the household method; persons who wrote in and requested tourism information were sent a questionnaire. The second report used the same method, questionnaires were sent to households that had purchased one of several licenses from the state (hunting, fishing, etc.) The third report actually analyzed the results of three surveys that represented a combination of the control point data collection method and the business method. Retail customers were questionned as they left the retail stores (a variation of control point) and business and lodging owners were surveyed (business). The last report used the household method, questionning second home owners.

The combination of the five reports provides Wisconsin with an indepth look at their tourism industry. The seven main topics are covered thoroughly

in the first and third reports. The remaining reports cover additional topics that include vacationer's perceptions of Wisconsin, an analysis of the effect tourism has on Wisconsin's employment, a review of where people are travelling within Wisconsin and what they see and do, and an analysis of the total demand for tourism in Wisconsin along with its ability to meet that demand (supply) is made. This analysis is the most complete look at any individual state's tourism industry that was reviewed for this report.

Iowa The state of Iowa ranks 47th in Gallup's "Travel Index" as a place that travellers would like to visit or re-visit. This would seem to indicate that tourism is not very important in Iowa, with only 11% of the respondents indicating that they have an interest in travelling to Iowa. However, this does not seem to be the case. The Iowa Development Commission, along with the Resource and Support Division and Travel Development Division, has prepared many reports on the economic impact of various tourist attractions.

The Iowa State Fair,³⁷ The Second Fort Atkinson Rendezvous,³⁸ The Mapleton Centennial,³⁹ The Cherokee Memorial Weekend Rodeo,⁴⁰ The Estherville Winter Snow Festival,⁴¹ The 1977 National Dairy Cattle Congress,⁴² and The Midwest Old Settlers and Threshers Reunion⁴³ are all examples of Iowa's impact studies. Each report is an on-site data collection study. Participants or visitors are given a questionnaire at the location of the event, and are requested to complete it and return the questionnaire by mail.

All of the studies discussed the total expenditures, and by nature of the reports, the reasons for visits were discussed as well. Each of them also examined what information tourists used that influenced their decision to attend the events. The majority of the reports also discussed state of origin, overnight accommodations and size of party. Only one examined length of stay, while none of the reports discussed mode of

transportation. The only additional information obtained was whether tourists had visited the attractions in previous years. These studies of economic impact are a quick means to analyze the individual attraction's successes and failures. For a state that does not rely heavily on tourism, Iowa seems to be very thorough in its study of the industries' impact on the state.

The Midwestern States, in conclusion, although not as dependent upon tourism for their economic well-being as the Big Four, are every bit as thorough in their research. Mechanically, the kinds of research data collection methods are consistent with those used by California, Florida, Hawaii and New York. Substantially, the reports themselves are of equal or superior quality both in terms of content and approach to the tourism industry.

Other studies of Importance

One of the reports examined in review of previous studies used an innovative approach in studying tourism: psychographics. "Developing Tourism Strategies Using Psychographics: Comparing Decisions for Hawaii and South Carolina"⁴⁸ was written by two professors at the respective state universities. Research methods used (summarized in Table 1) include control point, household and historical studies. Passengers on flights departing from Hawaii were given a questionnaire to complete and return. In South Carolina, individuals who wrote in for tourism information were also sent a questionnaire. Finally, prior to analysis of this information, previous studies were summarized.

The seven main topics of interest are not completely covered in this report; only state of origin and the site of the tourist party are discussed. However, "Socio-economic-demographic (SED), psychographic media

habits, and travel behavior of tourists visiting Hawaii and South Carolina are examined."⁴⁸ (Page 2). This will provide each state with clear insight into who their vacationers are and some of the reasons why they visit each state. This detailed information will allow the states to plan more accurately its tactical approach to tourism. Psychographics will more than likely become an important tool in the study of tourism.

This review of literature is by no means exhaustive. Indeed, only a small number of the many thousands of tourism studies have been reviewed. Further inquiries into the area of tourism research should be directed to the Bibliography on Tourism and Travel-Research Studies, Reports and Articles,⁷⁰ a fairly comprehensive summary of available tourism research publications.

Minnesota's Tourism Industry

There are many studies of tourism in Minnesota available for review. One of these, and most significant in light of the current tourism study, is Minnesota Tourism '68: A Market Analysis.¹ This report is a thorough market analysis of tourism in Minnesota; it was conducted by three faculty members at the University of Minnesota. This market analysis is conceptually sound in regard to the objectives of the present study as well as the methodology utilized to gather the necessary information. In assessing the changes that have occurred in the tourism/vacation market since that time, the '68 study will be extremely valuable.

The extensiveness of data collection techniques was broader in the 1968 study. To gather background information about the tourism industry, the '68 study both utilized and went beyond the secondary data search of the current study. Knowledgeable individuals and Minnesota tourists were also questioned regarding the '68 tourist market situation. In gathering primary

data, again the '68 study was broader in scope. This data collection stage consisted of three phases: (1) the NFO panel survey, (2) telephone interviews with Twin City residents, and (3) a mail survey of persons redeeming a coupon for information about Minnesota vacation kits.

In comparison, the '79 study utilizes only the secondary data search and the NFO panel survey. Information obtained in each study, however, or the scope of the respective reports, is very similar. The more varied use of data collection methods in the '69 study does not seem to have decreased the current report's validity or credibility, therefore.

Both studies assess (1) the differences in vacationer and nonvacationer demographic and other classification variables, (2) the movement of travelers within and between states, (3) the principal activities and characteristics of Minnesota vacationers as compared to others, (4) the awareness of Minnesota advertising, (5) the satisfaction or dissatisfaction with Minnesota's vacation facilities, accommodations, and activities available, (6) how families plan their vacation decisions - what influences are important, who makes the decision, when it was made, and previous experience with the state, (7) the familiarity with Minnesota as a vacation spot and as a vacation spot advertiser, and (8) why (or why not) vacationers chose (did not choose) Minnesota as a destination, and if they would consider it in the future.

The '69 study also utilized a 1958 study² as a reference point from which to draw conclusions and formulate hypotheses about tourism trends. Because of this, our report can extend its analysis back twenty years to the '58 study as well and increase the accuracy of hypotheses about tourism trends.

2. Sielaff, Richard O., M.A.A. Vacation - Travel Survey 1958, Department of Business Development, State of Minnesota, St. Paul, MN (1958).

A second representative study of the Minnesota tourism industry is The Vacation Habits of Households Requesting a Minnesota Vacation Kit.³¹

This study measures the effectiveness of an advertisement for Minnesota Vacation Kits, and also summarizes information about Minnesota tourists.

Some of the conclusions of the report include:

- (1) Minnesota vacations tended to last for 3.0 nights and cost \$55 for in-state vacationers, while out-of-state households spent 4.6 nights and \$144.
- (2) 70% of all vacation trips were taken in June, July or August.
- (3) Friends and relatives or campgrounds were the most frequent types of overnight accommodations.

This data was collected in 1972; when compared with the data summarized in Table 2, which was collected in 1966, trends can be observed. For example, the number of days in the vacation have decreased, while the amount spent per vacation has increased. (This information is not really generalizable in this fashion because the 1966 data measures in "days" and "per person", while the 1972 data measures in "nights" and "per party". Again, an attempt must be made in the future to standardize terms.)

Trends. Minnesota has also sponsored research through the Research Division of the Department of Economic Development for the last decade approximately.^{9-13, 23,24} From this research, data can be compared and established trends can be observed.

Table 4 summarizes a representative sample of indicators used to measure changes in the tourism and travel industry by year. Both the Duluth Hotel and Motel Tax Receipts and Car Rentals at International Airport have consistently increased year to year, although the increases themselves vary widely. Surprisingly, the indicators show strength during the 1973-1974 recession. The weakest area in general appears to be the sports attendance, although the data is incomplete from 1974 through 1977.

Minnesota tourism research is consistent with other Midwestern research. That is, it appears to be of very high quality in terms of content and approach to tourism study. The methods of data collection are also consistent with those previously presented.

TABLE 4

SUMMARY OF TRENDS IN TOURISM BY
TOURIST-TRAVEL INDICATORS

Tourist-Travel Indicators	YEAR						
	13 1971	12 1972	11 1973	10 1974	9 1975	23 1976	24 1977
Employment in Accommodations	c 1.1%-	d 5.6%+	4.9%+	5.8%+	1.1%-	8.4%+	1.8%+
Eating & Drinking Establishments			8.4%+	8.4%+	3.6%+	4.2%+	11.1%+
St. Paul Hotel-Motel Tax Receipts	4.0%-	2.4%-	6.5%+	6.0%+	2.1%-	a NA	NA
Duluth Hotel-Motel Tax Receipts	6.0%+	9.8%+	0.5%+	2.4%+	25.1%+	17%+	11%+
Car Rentals at International Airport	8.5% +	12.4%+	23.3%+	12.2%+	4.2%+	8.3%+	16.4%+
Aircraft Operations Arrivals & Departures	b 7.0%	6.4%+	10.4%+	5.5%-	31.9%+	8.2%+	6.3%+
Bloomington Tax and Admission Receipts	6.9%	8.9%+	6.9%+	10.5%+	NA	NA	NA
Mining Observation Post Attendance	3.9%+	6.6%-	NA	4.2%-	5.7%+	19.8%+	NA
North Stars Attendance	11%+	5.6%+	.05%+	NA	NA	NA	NA
Twins Attendance	25%-	9%-	20%+	NA	NA	NA	NA
Vikings Attendance	Capacity	Capacity	5.5%-	NA	NA	NA	NA

a
NA: Not Available

b
NW Airlines on strike for six months

The Current Study

The current study, in light of the review of other tourism studies, appears appropriate both in terms of the kind of data collection method being used and the topics of interest that are examined. Both the household method and historical studies are utilized to obtain information. Not only are all seven main topics covered within the study (something most reports do not do), but several additional topics are examined. The vacationer's destination, whether the vacation was part of a tour or charter, influences on the vacations destination decision, when the decision was made to travel, whether a return visit will ever be made to the destination state, and whether Minnesota could have been substituted for the destination state (assuming it was not Minnesota) were all studied in the current research report.

In conclusion, the current report will provide a thorough and extensive analysis of Minnesota's tourism industry in 1978-9. It also adds the innovative approach of examining why Minnesota is not a destination state; which will provide insight into Minnesota's promotional package for tourism, as well as pointing out weak areas in the state's tourism offerings.

MIDWESTERN VACATION MARKET

In this study a vacation is defined as a "trip taken mainly for recreational purposes where at least one member of the family is away from home at least overnight". It is important to note that this excludes such things as (1) a business trip or (2) a day-long picnic or fishing trip that does not involve an overnight stay. Vacation trips throughout the year are included, as is any vacation trip taken by at least one member of the family.

The multiscard sample provides most of the data used in this section. As noted in the Methodology section, the multiscard is a short questionnaire sent to a representative cross-section of 16,500 families in the Midwestern states. Nearly 14,000 families responded. A comparison of the socio-economic characteristics of the respondents and non-respondents revealed no statistically significant differences. (See Appendix C, Table 1). Thus, it is assumed the multiscard sample is representative of all families living in the Midwest. Each multiscard response represents about 1105 families (or 1466 households).¹

Proportion of Vacationers

As shown in Table 1, 70 percent of all Midwestern families have at least one or more members who take at least one vacation per year. Table 6 also shows that only five of the twelve states are within 3 percent of the 70 percent, so that although 70 percent is the average number of families that have vacationed, there is indeed some variation by state. Illinois (74.2 percent) and Michigan (73.5 percent) are higher than the average; South Dakota (62 percent) and Kansas (66 percent) are significantly lower. There also appears to be some variation within states for example in Illinois 74% of respondents take vacations, only 68% from Chicago did and in Minnesota

1. Based on current estimates for households of 20.24 million units and families, 15.258 million units.

REGIONAL TOURISM STUDY
STATE OF RESIDENCE
Q.1 DID YOU OR ANY MEMBER OF YOUR HOUSEHOLD TAKE A VACATION

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
TOTAL	975 100.0 7.1	13807 100.0 100.0	2527 100.0 18.3	1372 100.0 9.9	717 100.0 5.2	588 100.0 4.3	1990 100.0 14.4	1019 100.0 7.4	457 100.0 3.3	145 100.0 1.1	2657 100.0 19.2	179 100.0 1.3	1181 100.0 8.6
DID FAMILY VACATION													
YES	690 70.8 7.1	9671 70.0 100.0	1875 74.2 19.4	926 67.5 9.6	513 71.5 5.3	388 66.0 4.0	1463 73.5 15.1	675 66.2 7.0	318 69.6 3.3	106 73.1 1.1	1811 68.2 18.7	111 62.0 1.1	795 67.3 8.2
NO	285 29.2 6.9	4136 30.0 100.0	652 25.8 15.8	446 32.5 10.8	204 28.5 4.9	200 34.0 4.8	527 26.5 12.7	344 33.8 8.3	139 30.4 3.4	39 26.9 .9	846 31.8 20.5	68 38.0 1.6	386 32.7 9.3
TOTAL	690 100.0 7.1	9671 100.0 100.0	1875 100.0 19.4	926 100.0 9.6	513 100.0 5.3	388 100.0 4.0	1463 100.0 15.1	675 100.0 7.0	318 100.0 3.3	106 100.0 1.1	1811 100.0 18.7	111 100.0 1.1	795 100.0 8.2
HOW MANY TRIPS													
1	271 39.3 7.0	3877 40.1 100.0	705 37.6 18.2	391 42.2 10.1	214 41.7 5.5	152 39.2 3.9	580 39.6 15.0	278 41.2 7.2	147 46.2 3.8	40 37.7 1.0	737 40.7 19.0	50 45.0 1.3	312 39.2 8.0
2	189 27.4 6.7	2806 29.0 100.0	550 29.3 19.6	263 28.4 9.4	136 26.5 4.8	114 29.4 4.1	416 28.4 14.8	200 29.6 7.1	84 26.4 3.0	33 31.1 1.2	550 30.4 19.6	28 25.2 1.0	243 30.6 8.7
3	131 19.0 7.8	1687 17.4 100.0	333 17.8 19.7	162 17.5 9.6	95 18.5 5.6	70 18.0 4.1	268 18.3 15.9	96 14.2 5.7	49 15.4 2.9	15 14.2 .9	316 17.4 18.7	17 15.3 1.0	135 17.0 8.0
4 OR MORE	99 14.3 7.6	1301 13.5 100.0	287 15.3 22.1	110 11.9 8.5	68 13.3 5.2	52 13.4 4.0	199 13.6 15.3	101 15.0 7.8	38 11.9 2.9	18 17.0 1.4	208 11.5 16.0	16 14.4 1.2	105 13.2 8.1
TOTAL	690 100.0 7.1	9671 100.0 100.0	1875 100.0 19.4	926 100.0 9.6	513 100.0 5.3	388 100.0 4.0	1463 100.0 15.1	675 100.0 7.0	318 100.0 3.3	106 100.0 1.1	1811 100.0 18.7	111 100.0 1.1	795 100.0 8.2

NUMBER OF VACATIONS COMPARED TO STATE OF RESIDENCE

TABLE 6

BASE - TOTAL RETURNS

71 percent took vacations while 76 percent of Minneapolis/St. Paul respondents took vacations. The table, however, emphasizes an important fact that is often overlooked in today's prosperity; three of every ten families in the Midwest have had no member that has taken a trip that qualifies as a "vacation", as defined in this study, during the year.

Families Taking Several Vacations

Number of Vacations. Of special importance to operators of recreation facilities are the families that take several vacations a year. The summary below of data from Table 6, identifies the relative importance in terms of the number of vacations taken:

<u>Vacations Per Year</u>	<u>No. of Families</u>	<u>Percent of all Vacationers</u>	<u>Percent of all Families</u>
None	4,136	--	30
One	3,877	40	28
Two	2,806	29	20
Three	1,687	17	12
Four or More	<u>1,301</u>	<u>14</u>	<u>10</u>
Total	13,807	100	100

Thus, almost three of every ten families (28 percent) in the entire sample take only a single vacation during the year. A little more than four of every ten families takes two or more vacations.

These figures tend to hide the importance of the families taking more than one vacation, as shown below:

<u>Vacations Per Year</u>	<u>No. of Families</u>	<u>Total Vacations</u>	
		<u>Number</u>	<u>Percent</u>
One	3,877 X 1	3,877	20
Two	2,806 X 2	5,612	28
Three	1,687 X 3	5,061	26
Four or More	<u>1,301 X 4</u>	<u>5,204</u>	<u>26</u>
Total	9,671	19,754	100

The 5,794 families that take more than one vacation per year took a total of 15,877 vacations during the year. Thus, 42 percent of the families in the sample took 80 percent of all the vacations taken. This group represents the most important single segment of the vacation market in terms of days on vacation and probably in terms of dollars expended. The importance of this market is even understated slightly because the average number of vacations taken by the most frequent vacationers is not four (as shown in the tabulation) but somewhat greater than four.

Characteristics

It is possible to set down some of the characteristics of Midwestern families who are non-vacationers, who take a single vacation per year, and who take two or more vacations. Six of the more common characteristics of families that might be related to vacation behavior were studied. These, which are graphed in Figures 1 through 8 are: Family, income, occupation of the head of the family, family life cycle stage/age of head of household, education level of head of household, family size, and residence location.

See Appendix , Tables through for complete tables).

These figures which were developed from the multicard sample, suggest the following conclusions:

Income. As can be seen in Figure 1, family income is highly related to the number of vacations taken. In general, the greater the family income, the more likely the family is to vacation. Also, on the average, the greater the family income, the more vacations taken. Over half of the Midwestern families that vacation have incomes exceeding \$14,000, and they take about two thirds of the vacations.

Occupation. Figure 2, displays vacation frequency by the head of household's occupation. Professionals and managers or officials are the most likely to vacation; whereas those persons in the service, the labor

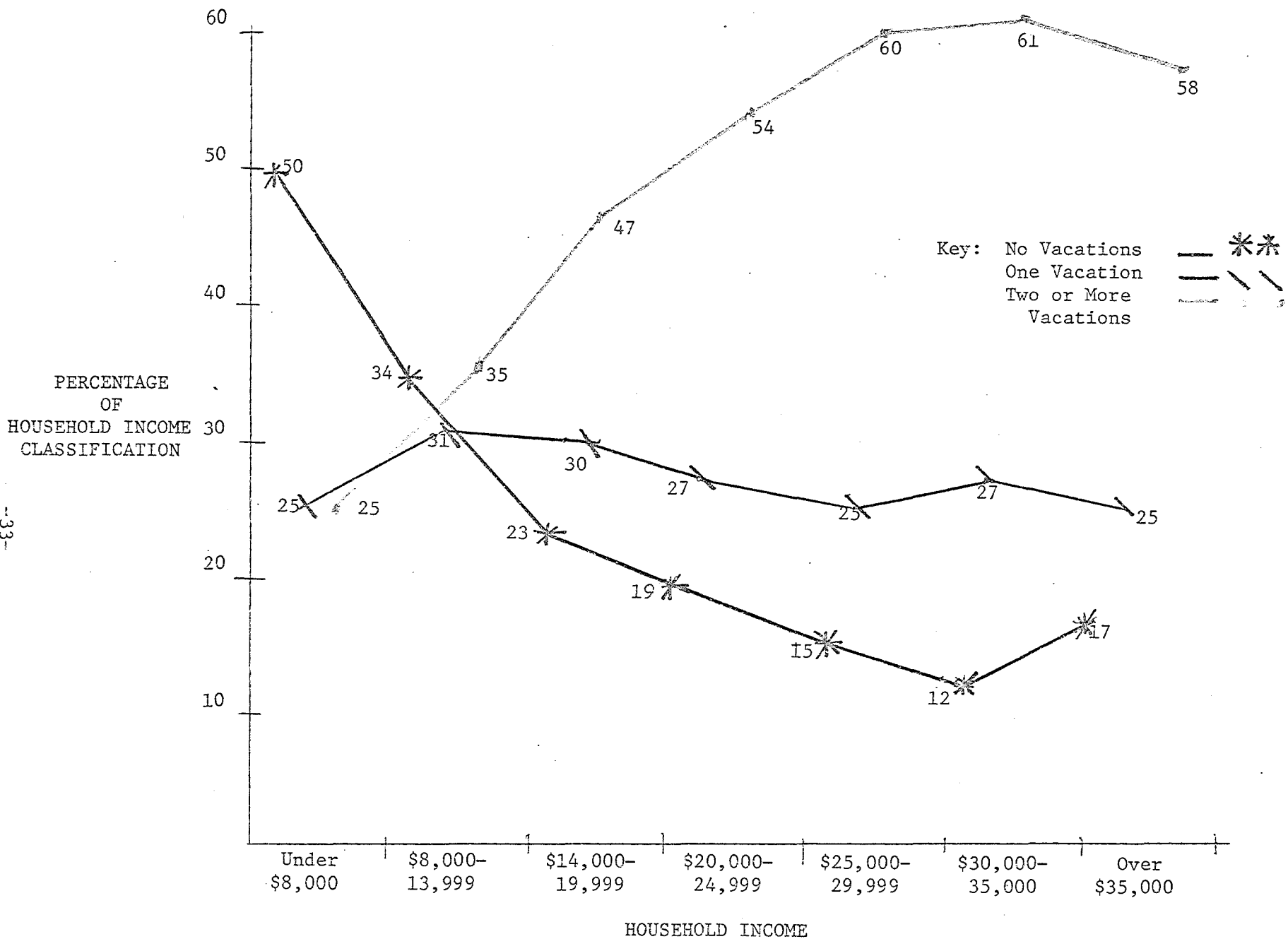
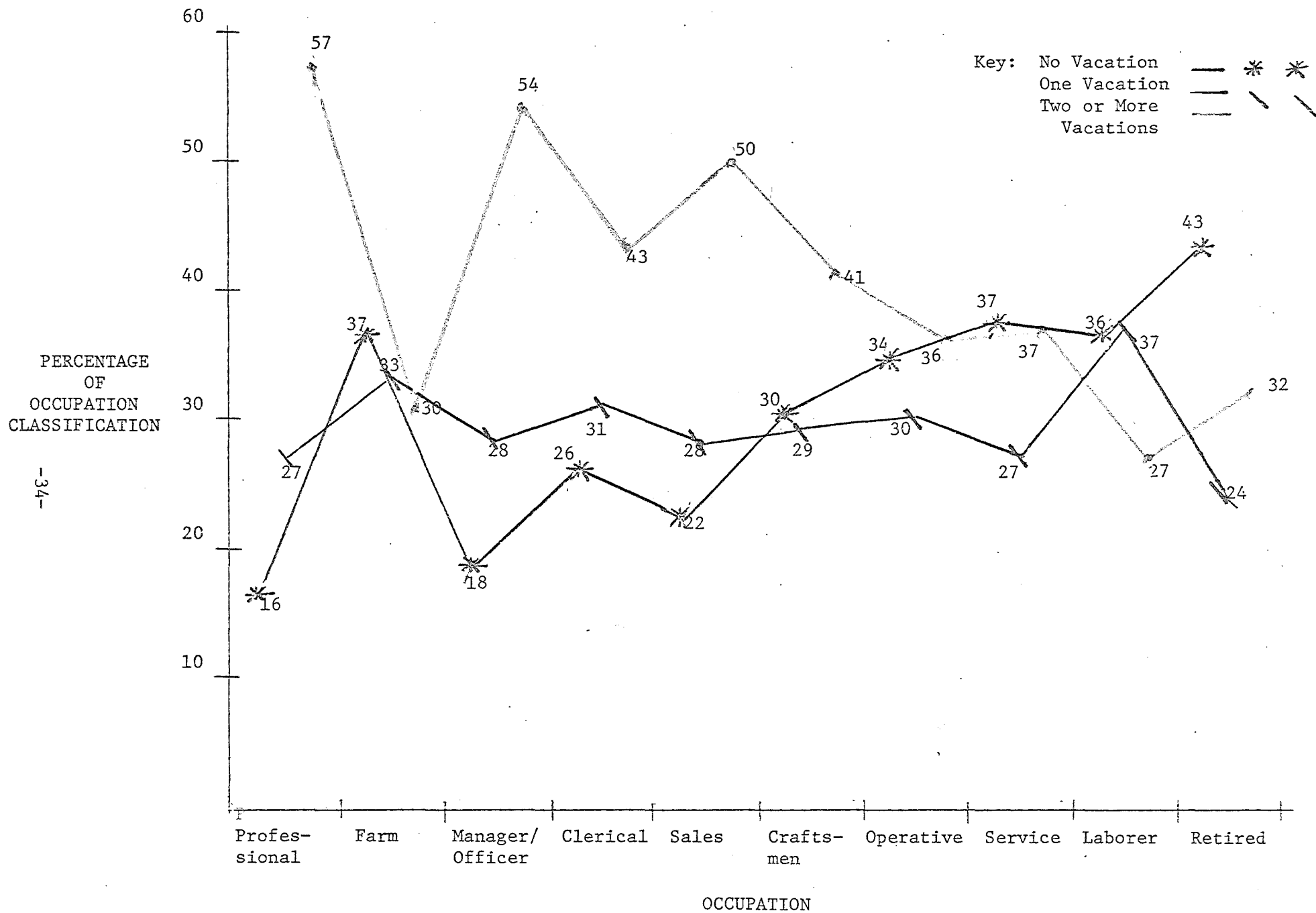


FIGURE 1.



force or particularly those who are retired are least likely to vacation. Again, those respondents who are most likely to vacation (i.e. professionals and managers/officers) are also most likely to take more than one vacation.

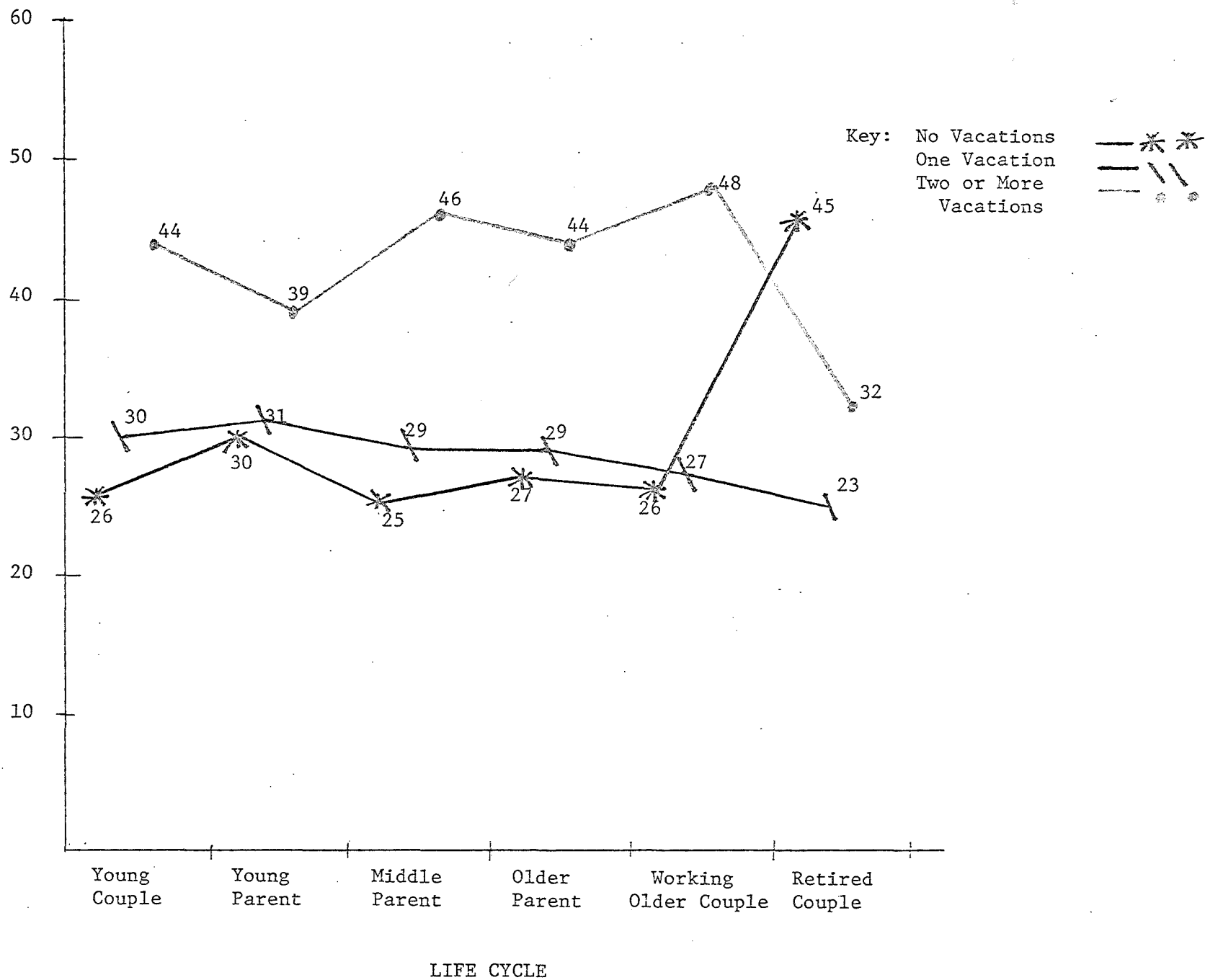
Life Cycle/Age. Figures 3 and 4 summarize vacation patterns by stage in the family life cycle and age of the head of household. Both figures indicate a consistent vacation behavior, with two or more vacations increasing with age or life cycle stage while one and no vacations decline slightly. The notable exception to this is the 65 and over or "Retired" group. Over 40 percent of this group does not vacation at all during the year, and only one third will take two or more vacations. (This group does however tend to take longer vacations than the average, 11.2 days versus 7.6 days).

Educational Level. The head of household's educational level, like income, is directly related to vacation travel. As the level of education increases, responses to "No Vacations" decreases, while "Two or more vacations" steadily increases. Indeed, over 60 percent of those respondents having completed some post grad work have taken two or more vacations during the last year. Compare this to almost 50 percent of the "not high school grad" group who have taken no trips.

Family Size. Family size, Figure 6, does not exhibit any correlation with vacation behavior. Each group has about 30 percent who do not vacation, 30 percent who take one vacation and approximately 40 percent who vacation two or more times a year.

Location/City of Residence. Figures 7 and 8 attempt to pinpoint exactly where the major departure locations can be found. Figure 7 demonstrates the fact that those families living in large metropolitan areas (2,000,000 and over) are the most likely to vacation. However, all metropolitan residents travel more frequently than those from areas having less than 50,000 population.

PERCENTAGE
OF
LIFE CYCLE
CLASSIFICATION



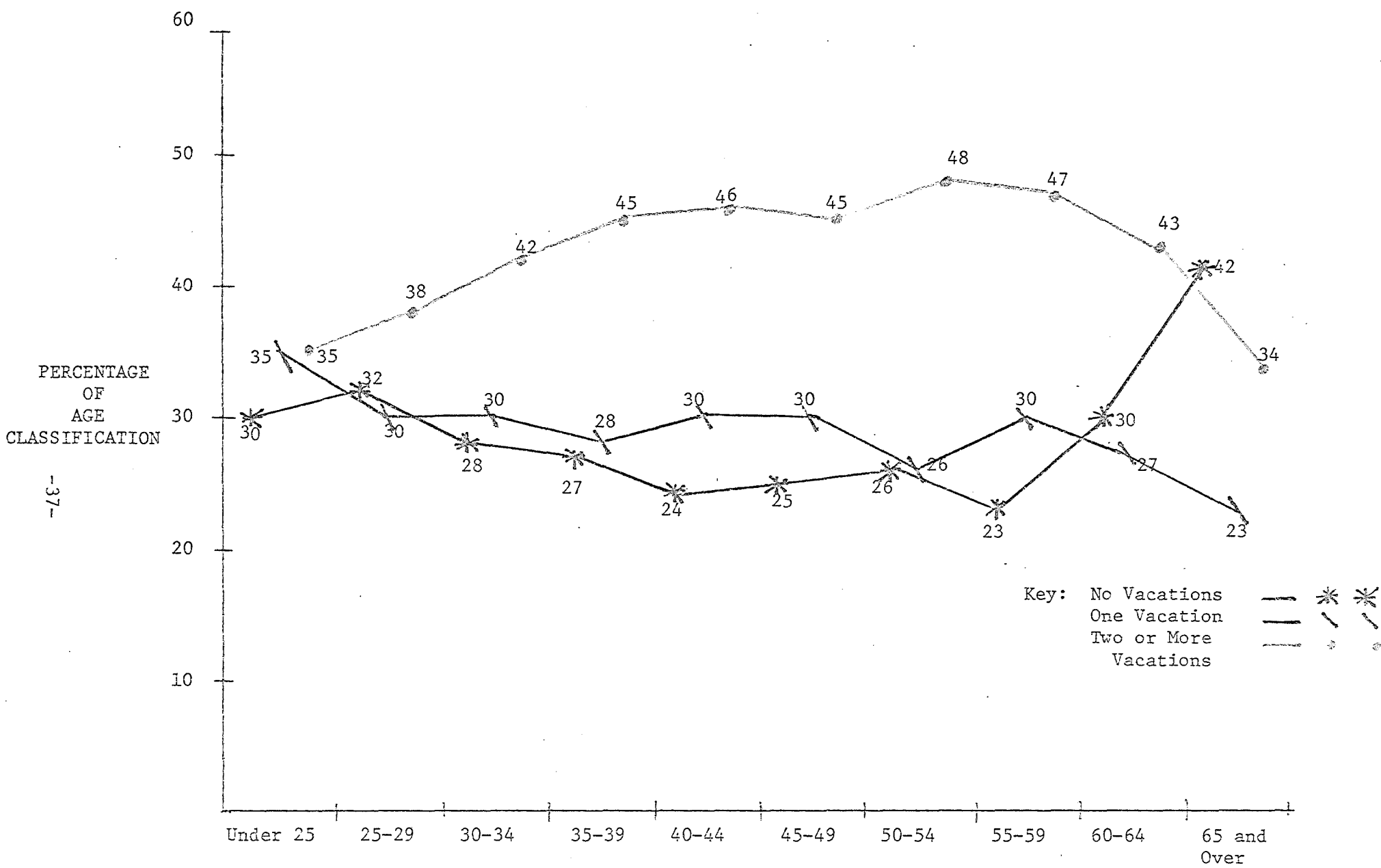
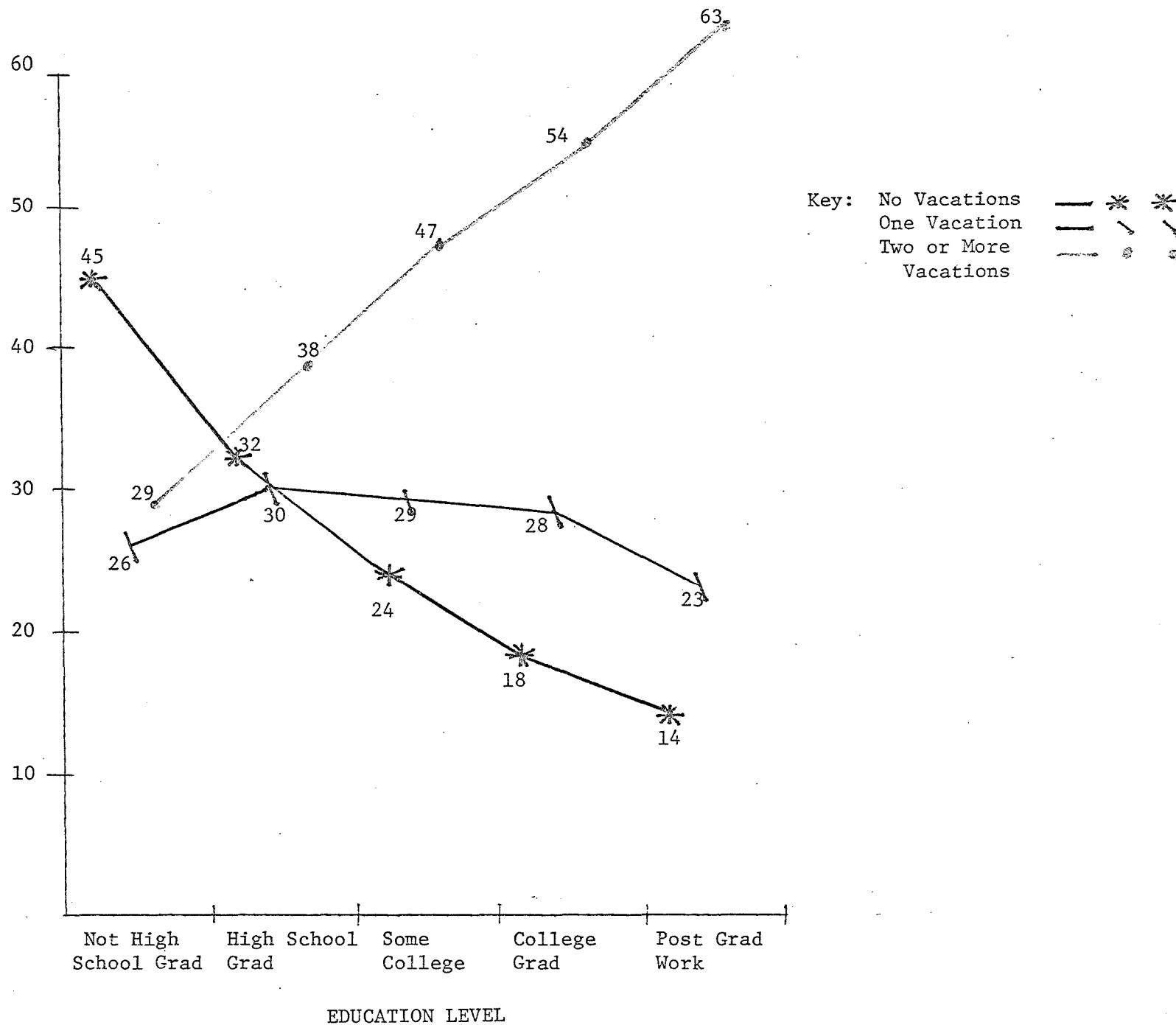


FIGURE 4.

AGE

PERCENTAGE
OF
EDUCATION LEVEL
CLASSIFICATION



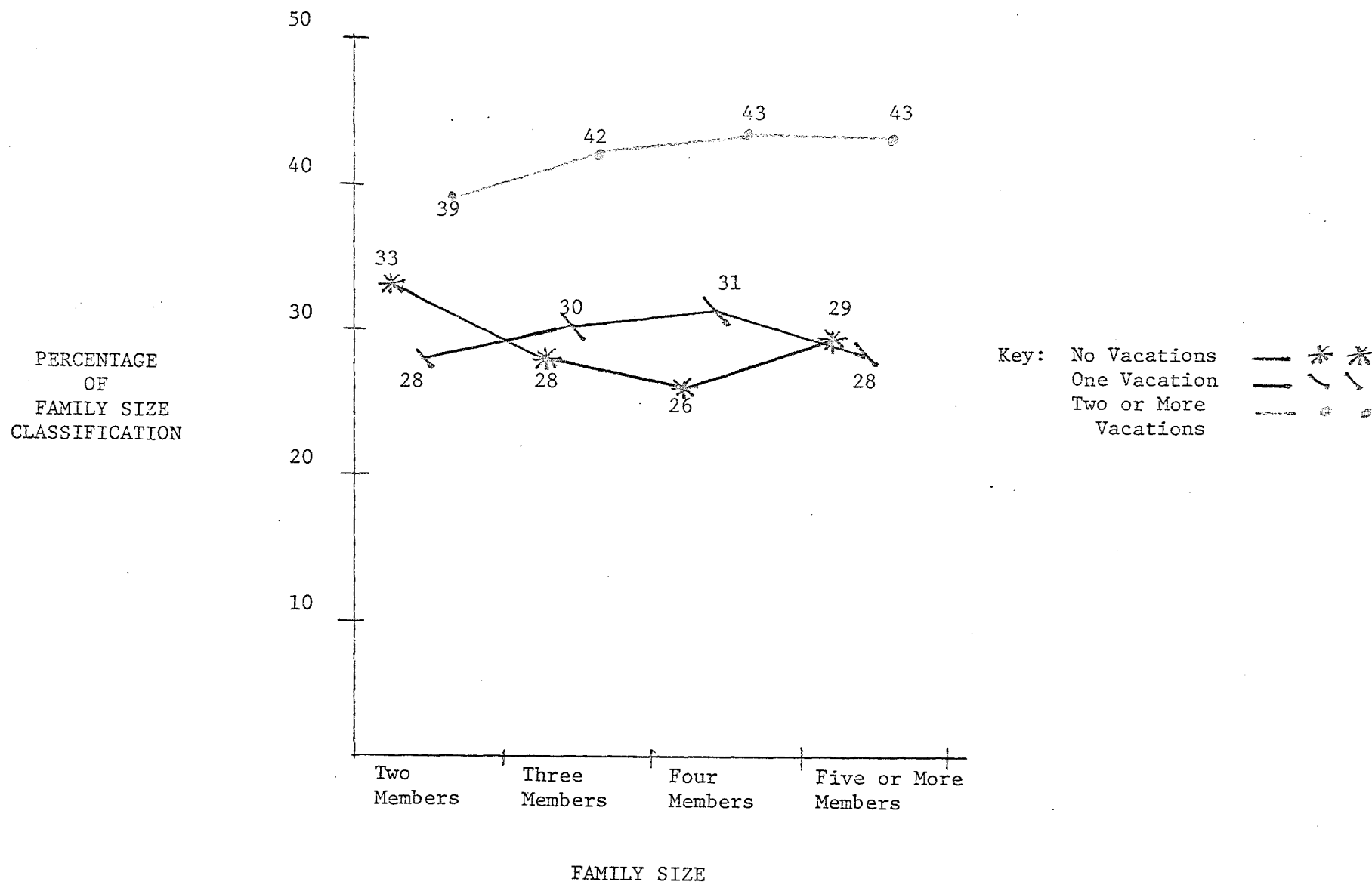
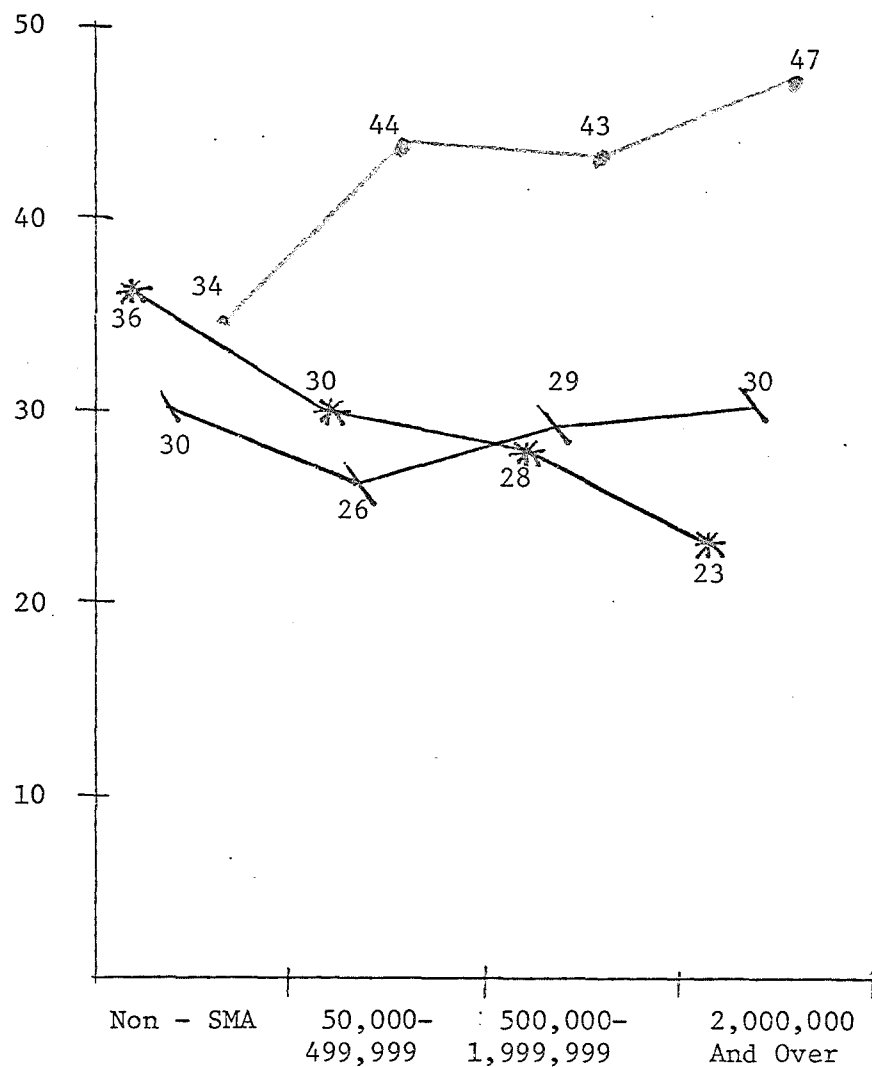


FIGURE 6.

PERCENTAGE
OF
LOCATION
CLASSIFICATION



Key: No Vacations
One Vacation
Two or More
Vacations



LOCATION

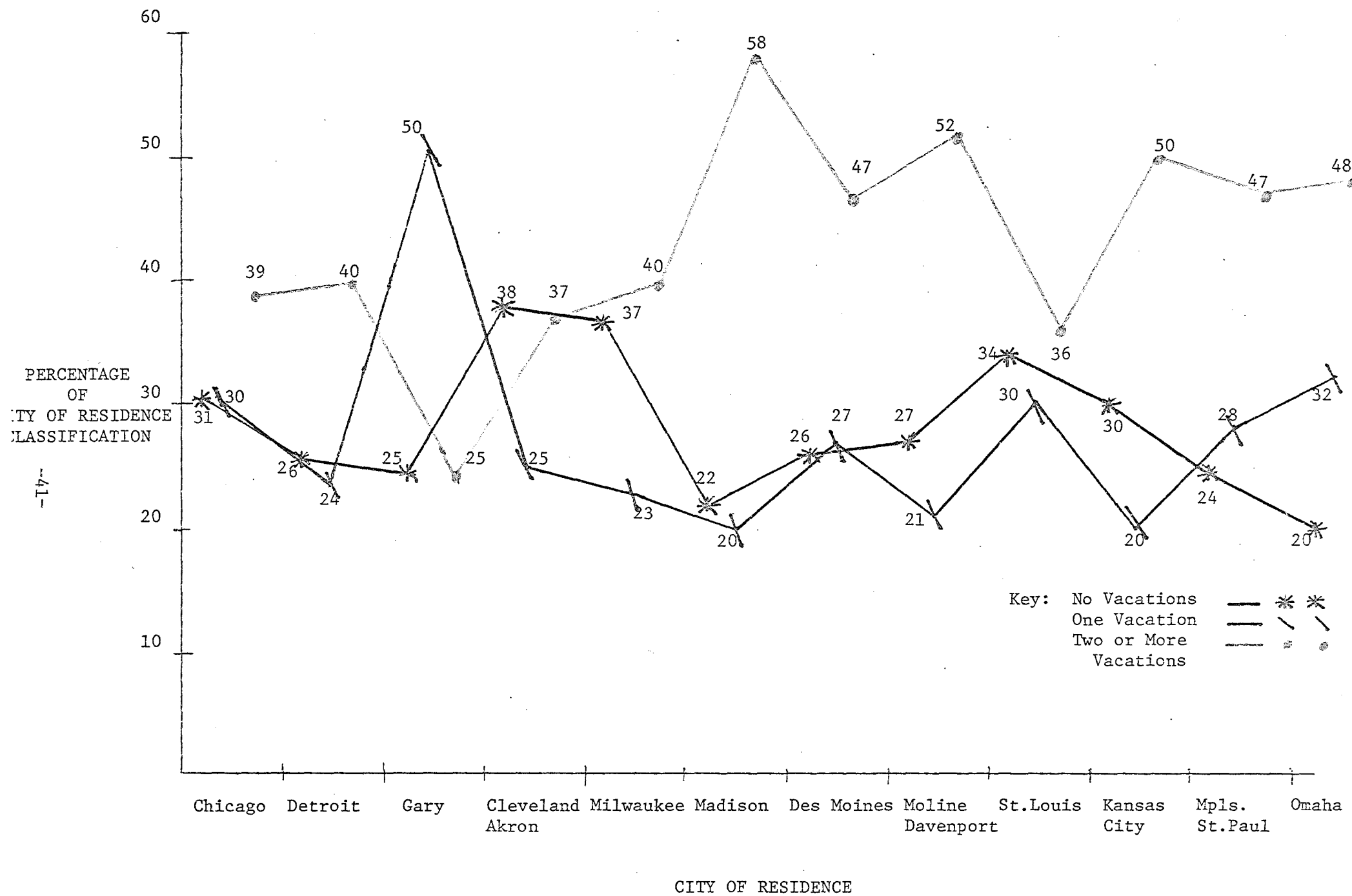


FIGURE 8.

Of the major metropolitan cities, Cleveland/Akron and Milwaukee are below the norm in vacations taken: almost 40 percent have taken no vacations during the year. Those persons residing in Milwaukee, Des Moines, Davenport/Moline, Kansas City, Minneapolis/St. Paul, and Omaha are the opposite, with almost 50 percent taking two or more vacations per year.

Summary. Income, Occupation and Education Level are the most highly correlated variables with vacation behavior. These three variables are frequently combined to form a social class rank. Some form of this ranking process may be useful in predicting vacation behavior.

Vacation Description

It is important to understand the "Vacationer" in terms of demographics, socio-economic status and even psychographics, as discussed in the previous section. It is equally important, however, to understand the vacation itself; that is, when people travel, how long they stay, where they go, and what they do on their vacations. Combining information about both the vacationer and his vacation, will provide a solid foundation for a successful marketing plan.

Month of Travel

State of Residence. The entire Midwest region travels most heavily during the summer months from June through October; and most heavily during July and August, which account for over one third of all vacations taken. North Dakotans travel most during June (15 percent), while Minnesotans travel most during July (18 percent). The non summer months account for between 3 percent and 7 percent of vacation travel. (See Table 7).

Length of Stay

Average Days Away. The average number of days spent away from home on vacation is about seven or eight days. This is true for all states of residence in the Midwest Region; although North Dakotans do spend almost ten days away.

Incremental Distribution. North Dakota and South Dakota are the two states that vary the most from the average on the distribution of days away. South Dakotans are the most likely to have a three day vacation. Twenty-seven percent travel for three days as opposed to seventeen percent for the other states. Accordingly, these same vacationers take fewer week long vacations or two week vacations. North Dakotans are the most likely to take three week or month long vacations; almost nine percent travel for this time period compared to four percent for the rest of the Midwest region. (See Table 8).

REGIONAL TOURISM STUDY
STATE OF RESIDENCE
Q.2 MONTH AND YEAR OF VACATION TRIPS

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
TOTAL	1438 100.0 7.3	19754 100.0 100.0	3952 100.0 20.0	1843 100.0 9.3	1043 100.0 5.3	798 100.0 4.0	3012 100.0 15.2	1370 100.0 6.9	614 100.0 3.1	223 100.0 1.1	3617 100.0 18.3	221 100.0 1.1	1623 100.0 8.2
WHEN DO TOURISTS VACATION													
JANUARY	55 3.8 9.3	591 3.0 100.0	128 3.2 21.7	54 2.9 9.1	45 4.3 7.6	22 2.8 3.7	80 2.7 13.5	35 2.6 5.9	18 2.9 3.0	16 7.2 2.7	73 2.0 12.4	8 3.6 1.4	57 3.5 9.6
FEBRUARY:	86 6.0 11.0	781 4.0 100.0	166 4.2 21.3	60 3.3 7.7	38 3.6 4.9	22 2.8 2.8	130 4.3 16.6	31 2.3 4.0	31 5.0 4.0	6 2.7 .8	126 3.5 16.1	14 6.3 1.8	71 4.4 9.1
MARCH	79 5.5 7.7	1031 5.2 100.0	192 4.9 18.6	94 5.1 9.1	54 5.2 5.2	38 4.8 3.7	185 6.1 17.9	51 3.7 4.9	29 4.7 2.8	6 2.7 .6	193 5.3 18.7	10 4.5 1.0	100 6.2 9.7
APRIL	47 3.3 4.8	978 5.0 100.0	221 5.6 22.6	104 5.6 10.6	40 3.8 4.1	30 3.8 3.1	170 5.6 17.4	64 4.7 6.5	18 2.9 1.8	6 2.7 .6	182 5.0 18.6	6 2.7 .6	90 5.5 9.2
MAY	83 5.8 6.2	1331 6.7 100.0	225 5.7 16.9	138 7.5 10.4	69 6.6 5.2	57 7.1 4.3	202 6.7 15.2	118 8.6 8.9	56 9.1 4.2	17 7.6 1.3	239 6.6 18.0	12 5.4 .9	115 7.1 8.6
JUNE	167 11.6 7.2	2321 11.7 100.0	461 11.7 19.9	234 12.7 10.1	121 11.6 5.2	109 13.7 4.7	293 9.7 12.6	177 12.9 7.6	61 9.9 2.6	34 15.2 1.5	447 12.4 19.3	39 17.6 1.7	178 11.0 7.7
JULY	263 18.3 8.0	3297 16.7 100.0	658 16.6 20.0	286 15.5 8.7	167 16.0 5.1	116 14.5 3.5	509 16.9 15.4	218 15.9 6.6	103 16.8 3.1	39 17.5 1.2	625 17.3 19.0	32 14.5 1.0	281 17.3 8.5
AUGUST	228 15.9 6.7	3407 17.2 100.0	679 17.2 19.9	290 15.7 8.5	224 21.5 6.6	125 15.7 3.7	542 18.0 15.9	248 18.1 7.5	119 19.4 3.5	29 13.0 .9	627 17.3 18.4	33 14.9 1.0	263 16.2 7.7
SEPTEMBER	145 10.1 7.8	1859 9.4 100.0	381 9.6 20.5	154 8.4 8.3	118 11.3 6.3	81 10.2 4.4	256 8.5 13.8	144 10.5 7.7	59 9.6 3.2	17 7.6 .9	353 9.8 19.0	12 5.4 .6	139 8.6 7.5
OCTOBER	126 8.8 6.8	1849 9.4 100.0	357 9.0 19.3	217 11.8 11.7	64 6.1 3.5	89 11.2 4.8	283 9.4 15.3	127 9.3 6.9	49 8.0 2.7	19 8.5 1.0	343 9.5 18.6	26 11.8 1.4	149 9.2 8.1
NOVEMBER	90 6.3 6.3	1431 7.2 100.0	310 7.8 21.7	129 7.0 9.0	61 5.8 4.3	59 7.4 4.1	226 7.5 15.8	96 7.0 6.7	41 6.7 2.9	15 6.7 1.0	264 7.3 18.4	18 8.1 1.3	122 7.5 8.5

BASE -- TOTAL TRIPS

MONTH OF VACATION COMPARED TO STATE OF RESIDENCE

TABLE 7

STATE OF RESIDENCE
Q.2 MONTH AND YEAR OF VACATION TRIPS

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
DECEMBER-77	60 4.2 7.9	756 3.8 100.0	154 3.9 20.4	69 3.7 9.1	39 3.7 5.2	38 4.8 5.0	113 3.8 14.9	51 3.7 6.7	24 3.9 3.2	16 7.2 2.1	130 3.6 17.2	10 4.5 1.3	52 3.2 6.9
NO ANSWER	9 7.6 7.4	122 6.6 100.0	20 5.5 16.4	14 8.8 11.5	3 2.3 2.5	12 1.5 9.8	23 8.8 18.9	10 7.7 8.2	6 1.0 4.9	3 1.3 2.5	15 4.4 12.3	1 5.5 8	6 4.4 4.9
TOTAL	1438 100.0 7.3	19754 100.0 100.0	3952 100.0 20.0	1843 100.0 9.3	1043 100.0 5.3	798 100.0 4.0	3012 100.0 15.2	1370 100.0 6.9	614 100.0 3.1	223 100.0 1.1	3617 100.0 18.3	221 100.0 1.1	1623 100.0 8.2

BASE - TOTAL TRIPS

TABLE 7 (continued)

REGIONAL TOURISM STUDY
STATE OF RESIDENCE
9.2 DAYS AWAY ON VACATION

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
LENGTH OF STAY													
AVERAGE	7.55	7.64	7.80	7.85	7.33	7.41	7.81	7.06	7.29	9.80	7.73	6.78	7.31
TOTAL DAYS OF VACATION	10755	149489	30451	14391	7572	5846	23276	9631	4401	2176	27699	1492	11799
TOTAL	1438 100.0 7.3	19754 100.0 100.0	3952 100.0 20.0	1843 100.0 9.3	1043 100.0 5.3	798 100.0 4.0	3012 100.0 15.2	1370 100.0 6.9	614 100.0 3.1	223 100.0 1.1	3617 100.0 18.3	221 100.0 1.1	1623 100.0 8.2
DAYS AWAY													
1	39 2.7 10.3	378 1.9 100.0	70 1.8 18.5	40 2.2 10.6	20 1.9 5.3	10 1.3 2.6	30 1.0 7.9	35 2.6 9.3	9 1.5 2.4	3 1.3 .8	89 2.5 23.5	3 1.4 .8	30 1.8 7.9
2	166 11.5 7.4	2236 11.3 100.0	392 9.9 17.5	246 13.3 11.0	114 10.9 5.1	84 10.5 3.8	301 10.0 13.5	160 11.7 7.2	64 10.4 2.9	21 9.4 .9	443 12.2 19.8	30 13.6 1.3	215 13.2 9.6
3	257 17.9 7.5	3409 17.3 100.0	642 16.2 18.8	299 16.2 8.8	191 18.3 5.6	149 18.7 4.4	544 18.1 16.0	250 18.2 7.3	102 16.6 5.0	36 16.1 1.1	593 16.4 17.4	60 27.1 1.8	286 17.6 8.4
4	206 14.3 8.6	2401 12.2 100.0	427 10.8 17.8	200 10.9 8.3	140 13.4 5.8	96 12.0 4.0	372 12.4 15.5	195 14.2 8.1	79 12.9 3.3	32 14.3 1.3	408 11.3 17.0	25 11.3 1.0	221 13.6 9.2
5	144 10.0 7.7	1878 9.5 100.0	385 9.7 20.5	154 8.4 8.2	97 9.3 5.2	80 10.0 4.3	311 10.3 16.6	120 8.8 6.4	64 10.4 3.4	24 10.8 1.3	333 9.2 17.7	23 10.4 1.2	143 8.8 7.6
6	53 3.7 6.0	880 4.5 100.0	177 4.5 20.1	85 4.6 9.7	60 5.8 6.8	42 5.3 4.8	138 4.6 15.7	64 4.7 7.3	32 5.2 3.6	11 4.9 1.3	144 4.0 16.4	6 2.7 .7	68 4.2 7.7
7	121 8.4 5.6	2159 10.9 100.0	485 12.3 22.5	221 12.0 10.2	109 10.5 5.0	78 9.8 3.6	324 10.8 15.0	147 10.7 6.8	64 10.4 3.0	23 10.3 1.1	406 11.2 18.8	17 7.7 .8	164 10.1 7.6
8	47 3.3 5.0	935 4.7 100.0	212 5.4 22.7	81 4.4 8.7	54 5.2 5.8	43 5.4 4.6	138 4.6 14.8	72 5.3 7.7	26 4.2 2.8	4 1.8 .4	167 4.6 17.9	11 5.0 1.2	80 4.9 8.6

BASE - TOTAL TRIPS

LENGTH OF VACATION COMPARED TO STATE OF RESIDENCE

TABLE 8

-46-

REGIONAL TOURISM STUDY
STATE OF RESIDENCE
Q.2 DAYS AWAY ON VACATION

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
9	35 2.4 7.8	447 2.3 100.0	85 2.2 19.0	49 2.7 11.0	15 1.4 3.4	19 2.4 4.3	69 2.3 15.4	39 2.8 8.7	12 2.0 2.7	3 1.3 .7	66 1.8 14.8	4 1.8 .9	51 3.1 11.4
10	81 5.6 5.7	1422 7.2 100.0	302 7.6 21.2	130 7.1 9.1	61 5.8 4.3	66 8.3 4.6	224 7.4 15.8	88 6.4 6.2	53 8.6 3.7	15 6.7 1.1	271 7.5 19.1	9 4.1 .6	122 7.5 8.6
11	9 6.6 6.5	138 7.7 100.0	26 7.7 18.8	16 9.9 11.6	8 5.8 5.8	2 1.3 1.4	22 7.7 15.9	9 6.7 6.5	3 2.5 2.2	4 1.8 2.9	28 8.8 20.3		11 7.0 8.0
12	29 2.0 9.5	306 1.5 100.0	71 1.8 23.2	30 1.6 9.8	18 1.7 5.9	10 1.3 3.3	41 1.4 13.4	21 1.5 6.9	11 1.8 3.6	6 2.7 2.0	48 1.3 15.7	3 1.4 1.0	18 1.1 5.9
13	11 1.8 10.3	107 5.5 100.0	19 5.5 17.8	16 9.9 15.0	3 2.3 2.8	4 3.7 3.7	14 5.5 13.1	6 4.4 5.6	3 2.8 2.8	2 1.9 1.9	21 6.6 19.6	2 1.9 1.9	6 5.6 5.6
14	100 7.0 8.7	1143 5.8 100.0	262 6.6 22.9	94 5.1 8.2	57 5.5 5.0	37 4.6 3.2	176 5.8 15.4	68 5.0 5.9	29 4.7 2.5	11 4.9 1.0	228 6.3 19.9	9 4.1 .8	72 4.4 6.3
15	19 1.3 6.6	287 1.5 100.0	65 1.6 22.6	23 1.2 8.0	6 2.1 2.1	11 1.4 3.6	51 1.7 17.8	14 1.0 4.9	16 2.6 5.6		62 1.7 21.6	2 1.9 .7	18 1.1 6.3
16	12 1.3 6.9	175 9.9 100.0	42 1.1 24.0	19 1.0 10.9	8 4.8 4.6	8 1.0 4.6	26 9.9 14.9	10 1.7 5.7	6 1.0 3.4		31 9.9 17.7	2 1.1 1.1	11 7.7 6.3
17	8 7.6 7.5	107 5.5 100.0	24 6.6 22.4	11 10.6 10.3	6 5.6 5.6	5 4.6 4.7	17 15.6 15.9	8 7.6 7.5	1 2.9 .9		19 5.5 17.8		8 7.5 7.5
18	5 3.3 6.4	78 4.4 100.0	16 4.4 20.5	7 9.4 9.0	4 5.4 5.1	2 2.3 2.6	14 15.5 17.9	5 6.4 6.4	5 6.4 6.4	1 1.3 1.3	12 15.3 15.4	2 2.6 2.6	5 6.4 6.4
19	1 1.1 4.0	25 1.1 100.0	3 1.1 12.0	3 1.2 12.0	1 4.0 4.0	1 4.0 4.0	2 8.0 8.0	3 12.0 12.0	2 8.0 8.0		5 20.0 20.0	2 8.0 8.0	2 8.0 8.0
20	5 3.3 5.6	90 5.5 100.0	18 5.5 20.0	6 6.3 6.7	6 6.6 6.7	5 5.6 5.6	19 21.6 21.1	2 2.2 2.2	2 2.3 2.2	4 1.3 4.4	15 16.4 16.7		8 8.9 8.9
21	19 1.3 6.6	288 1.5 100.0	51 1.3 17.7	29 1.6 10.1	24 2.3 8.3	11 1.4 3.8	40 1.3 13.9	12 9.9 4.2	8 1.3 2.8	3 1.3 1.0	64 1.8 22.2	1 1.3 .3	26 1.6 9.0

TABLE 8 (continued)

BASE - TOTAL TRIPS

REGIONAL TOURISM STUDY
STATE OF RESIDENCE
Q.2 DAYS AWAY ON VACATION

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
22 DAYS OR MORE	58 4.0 8.4	688 3.5 100.0	132 3.3 19.2	74 4.0 10.8	31 3.0 4.5	26 3.3 3.8	109 3.6 15.8	36 2.6 5.2	13 2.1 1.9	19 8.5 2.8	131 3.6 19.0	9 4.1 1.3	50 3.1 7.3
NO ANSWER	13 7.9 7.3	177 1.9 100.0	46 1.2 26.0	10 .5 5.6	10 1.0 5.6	9 1.1 5.1	30 1.0 16.9	6 .4 3.4	10 1.6 5.6	1 .4 .6	33 9.9 18.6	1 .5 .6	8 .5 4.5
TOTAL	1438 100.0 7.3	19754 100.0 100.0	3952 100.0 20.0	1843 100.0 9.3	1043 100.0 5.3	798 100.0 4.0	3012 100.0 15.2	1370 100.0 6.9	614 100.0 3.1	223 100.0 1.1	3617 100.0 18.3	221 100.0 1.1	1623 100.0 8.2

BASE -- TOTAL TRIPS

TABLE 8 (continued)

Vacation Destination States

Nationally. Midwest Region travellers (those from the Midwest) travel most frequently to California (4 percent) and Florida (8 percent), and of all destination states outside of the Midwest Region. Within the Midwest, Illinois (6 percent), Michigan (9 percent), Minnesota (6 percent), Missouri (5 percent), Ohio (5 percent) and Wisconsin (9 percent) are the most frequently travelled to states of the twelve states within the region.

Regionally. Looking only at travel within the Midwest, Michigan (21 percent) and Wisconsin (21 percent) are by far most frequently mentioned destination states. Together they account for over 40 percent of the travel within the Midwest. Kansas, Nebraska, North Dakota and South Dakota account for very small amounts of travel. Together, these four states account for only twelve percent of total travel within the region. Minnesota accounts for 13 percent of the market. (See Tables 9, 10).

Vacation Purpose

Visiting Family and Friends. An average of 50 percent of all vacation travel is for the purpose of visiting family and friends. This is particularly true for residents of Kansas, North and South Dakota, with over 60 percent of these vacations being for the purpose of a visit with family and friends.

Outdoor Activities. Another 50 percent vacation and spend time pursuing some kind of outdoor activity. Eighty percent of these are summer activities, while the remainder (20 percent) are winter activities.

Sightseeing. A favorite travel activity, sightseeing, accounts for 43 * percent of travel purposes. Non-metropolitan sightseeing is a bit more popular than metropolitan; however, both account for about half of the sightseeing, with any overlap concentrated in the non-metro category.

* These purposes will add up to more than 100 percent due to multiple responses.

REGIONAL TOURISM STUDY
STATE OF RESIDENCE
Q.2 STATES AND COUNTRIES VISITED

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
TOTAL	1438 100.0 7.3	19754 100.0 100.0	3952 100.0 20.0	1843 100.0 9.3	1043 100.0 5.3	798 100.0 4.0	3012 100.0 15.2	1370 100.0 6.9	614 100.0 3.1	223 100.0 1.1	3617 100.0 18.3	221 100.0 1.1	1623 100.0 8.2
STATES AND COUN- TRIES VISITED													
ALABAMA	1 1.2	86 100.0	18 20.9	15 17.4	2 2.3	3 3.5	8 9.3	9 10.5			26 30.2	1 1.2	3 3.5
ALASKA	6 20.0	30 100.0	4 13.3	3 10.0		1 3.3	6 20.0	1 3.3	3 10.0		5 16.7		1 3.3
ARIZONA	35 2.4 11.6	301 1.5 100.0	66 1.7 21.9	15 .8 5.0	25 2.4 8.3	23 2.9 7.6	38 1.3 12.6	18 1.3 6.0	14 2.3 4.7	6 2.7 2.0	39 1.1 13.0	2 .9 .7	20 1.2 6.6
ARKANSAS	3 1.0	310 1.6 100.0	97 2.5 31.3	19 1.0 6.1	25 2.4 8.1	41 5.1 13.2	22 7.7	60 4.4 19.4	12 2.0 3.9	1 .4 .3	18 5.8	3 1.4 1.0	9 2.9
CALIFORNIA	55 3.8 7.9	692 3.5 100.0	155 3.9 22.4	51 2.8 7.4	38 3.6 5.5	34 4.3 4.9	85 2.8 12.3	60 4.4 8.7	32 5.2 4.6	13 5.8 1.9	111 3.1 16.0	11 5.0 1.6	47 2.9 6.8
COLORADO	45 3.1 7.0	639 3.2 100.0	104 2.6 16.3	36 2.0 5.6	61 5.8 9.5	98 12.3 15.3	49 1.6 7.7	62 4.5 9.7	84 13.7 13.1	2 .9 .3	46 1.3 7.2	12 5.4 1.9	40 2.5 6.3
CONNECTICUT	2 .1 5.0	40 .2 100.0	13 3.3 32.5	6 .3 15.0		1 .1 2.5	4 1.1 10.0	1 .1 2.5			11 3 27.5		2 .1 5.0
DELAWARE		22 .1 100.0	3 1.6 13.6	8 2.4 36.4	2 .2 9.1		2 .1 9.1		1 .2 4.5	1 .4 4.5	4 1.1 18.2		1 .1 4.5
DISTRICT OF COLUMBIA	5 .3 3.0	167 .8 100.0	19 .5 11.4	22 1.2 13.2	6 .6 3.6	5 .6 3.0	24 1.8 14.4	15 1.1 9.0	4 .7 2.4	3 1.3 1.8	54 1.5 32.3	1 .5 .6	9 .6 5.4
FLORIDA	54 3.8 3.3	1652 8.4 100.0	362 9.2 21.9	256 13.9 15.5	33 3.2 2.0	19 2.4 1.2	299 9.9 18.1	56 4.1 3.4	7 1.1 .4	4 1.8 .2	468 12.9 28.3	5 2.3 .3	89 5.5 5.4
GEORGIA	8 .6 4.9	162 .8 100.0	27 .7 16.7	29 1.6 17.9	6 .6 3.7	3 .4 1.9	15 .5 9.3	11 .8 6.8	3 .5 1.9		54 1.5 33.3		6 .6 3.7

BASE - TOTAL TRIPS

DESTINATION STATE/COUNTRY COMPARED TO STATE OF RESIDENCE

TABLE 9

STATE OF RESIDENCE
Q.2 STATES AND COUNTRIES VISITED

			STATE OF RESIDENCE										
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
HAWAII	15 1.0 7.3	206 1.0 100.0	60 1.5 29.1	23 1.2 11.2	7 1.7 3.4	8 1.0 3.9	21 1.7 10.2	13 1.9 6.3	2 1.3 1.0	3 1.3 1.5	34 1.9 16.5	2 1.9 1.0	18 1.1 8.7
IDAHO	2 1.1 4.2	48 1.2 100.0	10 1.3 20.8	2 1.1 4.2	7 1.7 14.6	4 1.5 8.3	3 1.1 6.3	3 1.2 6.3	3 1.5 6.3	2 1.9 4.2	9 1.2 18.8		3 1.2 6.3
ILLINOIS	55 3.8 4.9	1114 5.6 100.0	380 9.6 34.1	110 6.0 9.9	71 6.8 6.4	14 1.8 1.3	132 4.4 11.8	98 7.2 8.8	14 2.3 1.3	7 3.1 1.6	93 2.6 8.3	5 2.3 2.4	135 8.3 12.1
INDIANA	12 1.8 1.7	714 3.6 100.0	159 4.0 22.3	225 12.2 31.5	14 1.3 2.0	11 1.4 1.5	70 2.3 9.8	20 1.5 2.8	3 1.5 1.4	1 1.4 1.1	176 4.9 24.6	3 1.4 1.4	20 1.2 2.8
IOWA	63 4.4 12.1	522 2.6 100.0	102 2.6 19.5	17 1.9 3.3	178 17.1 34.1	14 1.8 2.7	20 1.7 3.8	37 2.7 7.1	32 5.2 6.1	5 2.2 1.0	13 1.4 2.5	12 5.4 2.3	29 1.8 5.6
KANSAS	9 1.6 3.2	279 1.4 100.0	43 1.1 15.4	11 1.6 3.9	8 1.8 2.9	105 13.2 37.6	10 1.3 3.6	32 2.3 11.5	29 4.7 10.4	1 1.4 1.4	19 1.5 6.8	6 2.7 2.2	6 2.4 2.2
KENTUCKY	6 1.4 1.2	488 2.5 100.0	70 1.8 14.3	118 6.4 24.2	8 1.6 1.6	7 1.9 1.4	37 1.2 7.6	21 1.5 4.3	2 1.3 1.4		206 5.7 42.2		13 1.8 2.7
LOUISIANA	13 1.9 8.0	162 1.8 100.0	38 1.0 23.5	18 1.0 11.1	6 1.6 3.7	3 1.4 1.9	17 1.6 10.5	19 1.4 11.7	4 1.7 2.5	2 1.9 1.2	25 1.7 15.4	1 1.5 1.6	16 1.0 9.9
MAINE	3 1.2 4.7	64 1.3 100.0	10 1.3 15.6	7 1.4 10.9	2 1.2 3.1	1 1.1 1.6	15 1.5 23.4	1 1.1 1.6			20 1.6 31.3		5 1.3 7.8
MARYLAND	5 1.3 5.1	99 1.3 100.0	15 1.4 15.2	3 1.0 3.0	5 1.5 5.1	1 1.0 1.0	10 1.3 10.1	6 1.4 6.1	3 1.5 3.0	1 1.0 1.0	47 1.3 47.5		3 1.6 3.0
MASSACHUSETTS	2 1.1 1.6	124 1.6 100.0	26 1.7 21.0	8 1.4 6.5	2 1.2 1.6	8 1.0 6.5	18 1.6 14.5	8 1.6 6.5		1 1.4 1.8	40 1.1 32.3	1 1.5 1.8	10 1.6 8.1
MICHIGAN	29 2.0 1.6	1842 9.3 100.0	250 6.3 13.6	152 8.2 8.3	19 1.8 1.0	6 1.8 1.3	1006 33.4 54.6	28 2.0 1.5	6 1.0 1.3	2 1.9 1.1	252 7.0 13.7	1 1.5 1.1	91 5.6 4.9
MINNESOTA	459 31.9 41.6	1103 5.6 100.0	151 3.8 13.7	36 2.0 3.3	129 12.4 11.7	11 1.4 1.0	24 1.8 2.2	25 1.8 2.3	47 7.7 4.3	56 25.1 5.1	21 1.6 1.9	34 15.4 3.1	110 6.8 10.0

BASE - TOTAL TRIPS

TABLE 9 (continued)

REGIONAL TRISM STUDY
STATE OF RESIDENCE
Q.2 STATES AND COUNTRIES VISITED

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
MISSISSIPPI	2 2.7	73 100.0	24 32.9	4 5.5	6 8.2	2 2.7	9 12.3	12 16.4	2 2.7		8 11.0		4 5.5
MISSOURI	15 1.0 1.5	1026 5.2 100.0	208 5.3 20.3	59 3.2 5.8	98 9.4 9.6	125 15.7 12.2	25 2.8 2.4	374 27.3 36.5	63 10.3 6.1	3 1.3 .3	29 2.8 2.8	3 1.4 .3	24 1.5 2.3
MONTANA	25 1.7 24.5	102 5.5 100.0	7 6.2 6.9	8 7.4 7.8	2 2.2 2.0	6 5.8 5.9	7 6.2 6.9	9 8.7 8.8	3 2.5 2.9	11 4.9 10.8	12 11.3 11.8	6 2.7 5.9	6 5.4 5.9
NEBRASKA	13 .9 5.3	243 1.2 100.0	24 2.6 9.9	5 3.3 2.1	34 3.3 14.0	33 4.1 13.6	8 3.3 3.3	26 1.9 10.7	71 11.6 29.2	4 1.8 1.6	8 3.2 3.5	10 4.5 4.1	7 2.9 2.9
NEVADA	6 .4 1.5	413 2.1 100.0	56 1.4 13.6	36 2.0 8.7	6 1.6 1.5	8 1.0 1.9	73 2.4 17.7	10 2.7 2.4	4 1.7 1.0	1 .4 .2	202 5.6 48.9		11 2.7 2.7
NEW HAMPSHIRE	1 .1 2.9	35 2.2 100.0	10 2.3 28.6	2 1.1 5.7			8 3.3 22.9	2 1.1 5.7			11 3.3 31.4		1 2.1 2.9
NEW JERSEY	2 .1 1.8	110 .6 100.0	24 2.6 21.8	8 4.4 7.3		2 3.3 1.8	22 7.7 20.0	5 4.4 4.5	2 3.3 1.8		43 1.2 39.1		2 1.1 1.8
NEW MEXICO	1 .1 1.4	70 .4 100.0	17 2.4 24.3	3 2.2 4.3	1 1.1 1.4	14 1.8 20.0	3 4.1 4.3	7 5.5 10.0	5 8.8 7.1		11 3.3 15.7	1 .5 1.4	7 2.6 10.0
NEW YORK	18 1.3 4.8	373 1.9 100.0	63 1.6 16.9	34 1.8 9.1	9 2.9 2.4	3 4.4 .8	76 2.5 20.4	20 1.5 5.4	8 1.3 2.1		127 3.5 34.0	2 -.9 .5	13 3.8 3.5
NORTH CAROLINA	2 .1 1.0	191 1.0 100.0	28 2.7 14.7	21 1.1 11.0	6 3.6 3.1	5 2.6 2.6	26 9.9 13.6	7 5.5 3.7			88 2.4 46.1	1 .5 .5	7 3.6 3.7
NORTH DAKOTA	38 2.6 32.2	118 .6 100.0	1 .8 .8	3 2.5 2.5	4 3.4 3.4	1 .8 .8	5 4.2 4.2	6 5.1 5.1	5 4.8 4.2	41 18.4 34.7	3 2.1 2.5	8 3.6 6.8	3 2.2 2.5
OHIO	11 .8 1.1	1029 5.2 100.0	87 2.2 8.5	122 6.6 11.9	5 3.5 5	15 1.9 1.5	185 6.1 18.0	23 1.7 2.2	9 1.5 .9	2 -.9 -.2	539 14.9 52.4	3 1.4 .3	28 1.7 2.7
OKLAHOMA	7 .5 3.3	214 1.1 100.0	25 2.6 11.7	12 5.7 5.6	11 1.1 5.1	63 7.9 29.4	10 3.3 4.7	49 3.6 22.9	12 2.0 5.6	2 -.9 -.9	16 7.5 7.5	4 1.8 1.9	3 1.4 1.4

BASE - TOTAL TRIPS

TABLE 9 (continued)

STATE OF RESIDENCE
Q-2 STATES AND COUNTRIES VISITED

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
OREGON	10 7 14.1	71 4 100.0	12 3 16.9		8 8 11.3	2 3 2.8	8 3 11.3	4 3 5.6	11 8 15.5	4 8 5.6	3 1 4.2	1 5 1.4	8 5 11.3
PENNSYLVANIA	6 4 1.5	413 1 100.0	56 4 13.6	36 0 8.7	6 6 1.5	8 0 1.9	73 4 17.7	10 7 2.4	4 7 1.0	1 4 .2	202 6 48.9		11 7 2.7
RHODE ISLAND		11 1 100.0	1 1 9.1	1 1 9.1			5 2 45.5				3 1 27.3		1 1 9.1
SOUTH CAROLINA	1 1 .5	182 9 100.0	23 6 12.6	24 3 13.2	1 1 .5	3 6 1.6	16 5 8.8	8 6 4.4	1 2 .5		97 7 53.3	2 9 1.1	6 4 3.3
SOUTH DAKOTA	57 0 20.1	283 4 100.0	20 5 7.1	6 3 2.1	35 4 12.4	18 3 6.4	8 3 2.8	10 7 3.5	24 9 8.5	17 6 6.0	12 3 4.2	66 9 23.3	10 6 3.5
TENNESSEE	18 3 4.8	373 9 100.0	63 6 16.9	34 8 9.1	9 9 2.4	3 4 .8	76 5 20.4	20 5 5.4	8 3 2.1		127 5 34.0	2 9 .5	13 8 3.5
TEXAS	31 2 7.6	409 1 100.0	73 8 17.8	43 3 10.5	23 3 5.6	38 8 9.3	41 4 10.0	61 5 14.9	22 6 5.4	3 3 .7	50 4 12.2	3 4 .7	21 3 5.1
UTAH	4 3 8.7	46 2 100.0	9 2 19.6	1 1 2.2	2 3 4.3	6 8 13.0	5 3 10.9	6 4 13.0	3 5 6.5		6 2 13.0	1 5 2.2	3 2 6.5
VERMONT	1 1 3.6	28 1 100.0	4 1 14.3	3 2 10.7	1 1 3.6		8 3 28.6	1 1 3.6			9 2 32.1		1 1 3.6
VIRGINIA	3 2 1.2	257 3 100.0	35 9 13.6	32 7 12.5	4 4 1.6	4 6 1.6	38 5 14.8	15 1 5.8			117 2 45.5	1 5 .4	8 5 3.1
WASHINGTON	18 3 13.3	135 7 100.0	26 7 19.3	5 3 3.7	7 7 5.2	9 1 6.7	16 5 11.9	7 5 5.2	8 3 5.9	7 1 5.2	18 5 13.3	1 5 .7	13 8 9.6
WEST VIRGINIA		133 7 100.0	12 3 9.0	11 6 8.3	2 2 1.5	1 1 .8	18 6 13.5		1 8 .8		88 4 66.2		
WISCONSIN	180 5 9.8	1836 3 100.0	695 6 37.9	54 9 2.9	83 0 4.5	6 8 .3	110 7 6.0	29 1 1.6	9 5 .5	7 4 .4	42 2 2.3	6 7 .3	615 9 33.5

BASE - TOTAL TRIPS

TABLE 9 (continued)

REGIONAL TOURISM STUDY
STATE OF RESIDENCE
Q.2 STATES AND COUNTRIES VISITED

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
WYOMING	16 1.1 9.6	166 8 100.0	24 1.6 14.5	7 .4 4.2	10 1.0 6.0	12 1.5 7.2	15 .5 9.0	15 1.1 9.0	19 3.1 11.4	4 1.8 2.4	18 .5 10.8	4 1.8 2.4	22 1.4 13.3
CANADA-NET -----	45 3.1 7.3	614 3.1 100.0	83 2.1 13.5	39 2.1 6.4	19 1.8 3.1	11 1.4 1.8	204 6.8 33.2	8 .6 1.3	14 2.3 2.3	12 5.4 2.0	126 3.5 20.5	5 2.3 .8	48 3.0 7.8
BRITISH COLUMBIA	1 .1 6.7	15 1 100.0	2 .1 13.3			2 3 13.3	3 1 20.0	1 1 6.7	1 2 6.7		2 1 13.3		3 2 20.0
MANITOBA	4 3 40.0	10 1 100.0	1 1 10.0				2 1 20.0			3 3 30.0			
NOVA SCOTIA		19 1 100.0	4 1 21.1	5 3 26.3		1 1 5.3	2 1 10.5		2 3 10.5		5 1 26.3		
ONTARIO	4 3 2.6	154 8 100.0	11 3 7.1	5 3 3.2	1 1 .6	2 3 1.3	93 3.1 60.4	1 1 .6		1 4 .6	30 8 19.5		6 4 3.9
QUEBEC		9 100.0	2 1 22.2	2 1 22.2							4 1 44.4		1 1 11.1
SASKATCHEWAN	1 1 20.0	5 1 100.0	1 1 20.0							3 3 60.0			
ALBERTA	3 2 23.1	13 1 100.0	1 1 7.7	2 1 15.4		2 3 15.4	2 1 15.4			1 4 7.7	1 1 7.7		1 1 7.7
CANADA PROVINCE UNSPECIFIED	33 2.3 8.3	397 2.0 100.0	63 1.6 15.9	25 1.4 6.3	19 1.8 4.8	5 1.6 1.3	104 3.5 26.2	6 1.4 1.5	11 1.8 2.8	5 2.2 1.3	84 2.5 21.2	5 2.3 1.3	37 2.5 9.3

MEXICO	11 8 9.7	113 6 100.0	29 7 25.7	7 4 6.2	4 4 3.5	6 8 5.3	19 6 16.8	6 4 5.3	3 5 2.7	1 4 .9	16 4 14.2		11 7 9.7
ALL OTHERS	28 1.9 6.1	461 2.3 100.0	131 3.3 28.4	40 2.2 8.7	24 2.3 5.2	17 2.1 3.7	72 2.4 15.6	28 2.0 6.1	9 1.5 2.0	3 1.3 .7	70 1.9 15.2	1 .5 .2	38 2.3 8.2
NO ANSWER	12 8 8.1	149 8 100.0	18 5 12.1	20 1.1 13.4	7 7 4.7	5 6 3.4	38 1.3 25.5	7 5 4.7			28 8 18.8	2 9 1.3	12 7 8.1

BASE -- TOTAL TRIPS

TABLE 9 (continued)

STATE OF RESIDENCE
Q.2 STATES AND COUNTRIES VISITED

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
TOTAL	1438 100.0 7.3	19754 100.0 100.0	3952 100.0 20.0	1843 100.0 9.3	1043 100.0 5.3	798 100.0 4.0	3012 100.0 15.2	1370 100.0 6.9	614 100.0 3.1	223 100.0 1.1	3617 100.0 18.3	221 100.0 1.1	1623 100.0 8.2

TABLE 9 (continued)

BASE - TOTAL TRIPS

REGIONAL TRIP STUDY
STATE OF RESIDENCE
Q.2 DESTINATION STATE

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
TOTAL	524 100.0 8.3	6287 100.0 100.0	1270 100.0 20.2	548 100.0 8.7	384 100.0 6.1	217 100.0 3.5	1049 100.0 16.7	415 100.0 6.6	196 100.0 3.1	84 100.0 1.3	904 100.0 14.4	83 100.0 1.3	613 100.0 9.8
MINNESOTA AND REGIONAL DESTINATIONS													
MINNESOTA	293 55.9 35.2	833 13.2 100.0	120 9.4 14.4	34 6.2 4.1	104 27.1 12.5	10 4.6 1.2	23 2.2 2.8	22 5.3 2.6	38 19.4 4.6	41 48.8 4.9	21 2.3 2.5	30 36.1 3.6	97 15.8 11.6
ALL OTHERS	348 66.4 5.9	5854 93.1 100.0	1219 96.0 20.8	530 96.7 9.1	332 86.5 5.7	213 98.2 3.6	1037 98.9 17.7	404 97.3 6.9	174 88.8 3.0	64 76.2 1.1	887 98.1 15.2	75 90.4 1.3	571 93.1 9.8
ILLINOIS	47 9.0 5.2	897 14.3 100.0	289 22.8 32.2	91 16.6 10.1	58 15.1 6.5	14 6.5 1.6	110 10.5 12.3	76 18.3 8.5	11 5.6 1.2	7 8.3 .8	76 8.4 8.5	5 6.0 .6	113 18.4 12.6
INDIANA	10 1.9 1.8	565 9.0 100.0	117 9.2 20.7	173 31.6 30.6	12 3.1 2.1	10 4.6 1.8	62 5.9 11.0	17 4.1 3.0	3 1.5 .5	1 1.2 .2	139 15.4 24.6	3 3.6 .5	18 2.9 3.2
IOWA	49 9.4 11.6	424 6.7 100.0	83 6.5 19.6	16 2.9 3.8	133 34.6 31.4	11 5.1 2.6	19 1.8 4.5	31 7.5 7.3	29 14.8 6.8	5 6.0 1.2	13 1.4 3.1	11 13.3 2.6	24 3.9 5.7
KANSAS	9 1.7 4.0	227 3.6 100.0	38 3.0 16.7	10 1.8 4.4	8 2.1 3.5	73 33.6 32.2	9 4.9 4.0	27 6.5 11.9	25 12.8 11.0	1 1.2 .4	16 1.8 7.0	5 6.0 2.2	6 1.0 2.6
MICHIGAN	27 5.2 2.0	1357 21.6 100.0	201 15.8 14.8	124 22.6 9.1	17 4.4 1.3	4 1.8 .3	651 62.1 48.0	25 6.0 1.8	6 3.1 .4	1 1.2 .1	224 24.8 16.5	1 1.2 .1	76 12.4 5.6
MISSOURI	15 2.9 1.9	798 12.7 100.0	179 14.1 22.4	50 9.1 6.3	83 21.6 10.4	96 44.2 12.0	22 2.1 2.8	241 58.1 30.2	54 27.6 6.8	3 3.6 .4	28 3.1 3.5	3 3.6 .4	24 3.9 3.0
NEBRASKA	13 2.5 6.8	192 3.1 100.0	21 1.7 10.9	5 .9 2.6	26 6.8 13.5	25 11.5 13.0	7 .7 3.6	19 4.6 9.9	50 25.5 26.0	4 4.8 2.1	7 .8 3.6	8 9.6 4.2	7 1.1 3.6
NORTH DAKOTA	34 6.5 35.8	95 1.5 100.0	1 .1 1.1	3 .5 3.2	4 1.0 4.2	1 .5 1.1	5 .5 5.3	5 1.2 5.3	3 1.5 3.2	26 31.0 27.4	3 .3 3.2	7 8.4 7.4	3 .5 3.2
OHIO	10 1.9 1.2	820 13.0 100.0	74 5.8 9.0	100 18.2 12.2	5 1.3 .6	13 6.0 1.6	160 15.3 19.5	19 4.6 2.3	6 3.1 .7	2 2.4 .2	405 44.8 49.4	3 3.6 .4	23 3.8 2.8

BASE - TOTAL HOUSEHOLDS TAKING TRIPS TO THAT REGION

REGIONAL DESTINATION STATE COMPARED TO REGIONAL STATE OF RESIDENCE

TABLE 10

STATE OF RESIDENCE
Q.2 DESTINATION STATE

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
SOUTH DAKOTA	49 9.4 20.4	240 3.8 100.0	19 1.5 7.9	6 1.1 2.5	29 7.6 12.1	12 5.5 5.0	8 3.8 3.3	10 2.4 4.2	23 11.7 9.6	15 17.9 6.3	12 1.3 5.0	47 56.6 19.6	10 1.6 4.2
WISCONSIN	129 24.6 9.6	1346 21.4 100.0	522 41.1 38.8	51 9.3 3.8	74 19.3 5.5	5 2.3 .4	88 8.4 6.5	26 6.3 1.9	7 3.6 .5	7 8.3 .5	39 4.3 2.9	5 6.0 .4	393 1.1 29.2
ALL CANADA	41 7.8 7.3	561 8.9 100.0	79 6.2 14.1	36 6.6 6.4	17 4.4 3.0	9 4.1 1.6	186 17.7 33.2	8 1.9 1.4	13 6.6 2.3	11 13.1 2.0	113 12.5 20.1	5 6.0 .9	43 7.0 7.7
ONTARIO	4 2.8 2.9	139 2.2 100.0	11 7.9 7.9	5 3.9 3.6	1 3 .7	1 5 .7	83 7.9 59.7	1 2 .7		1 1.2 .7	27 3.0 19.4		5 3.8 3.6
MANITOBA	4 8 40.0	10 2 100.0	1 1 10.0				2 2 20.0			3 3.6 30.0			
NOT SPECIFIED-CANADA	30 5.7 8.0	375 6.0 100.0	61 4.8 16.3	25 4.6 6.7	17 4.4 4.5	4 1.8 1.1	101 9.6 26.9	6 1.4 1.6	10 5.1 2.7	5 6.0 1.3	77 8.5 20.5	5 6.0 1.3	34 5.5 9.1
OTHER CANADA	4 7.8 7.8	51 8 100.0	9 7 17.6	7 1.3 13.7		4 1.8 7.8	6 11.8 11.8	1 2.0 2.0	3 5.9 5.9	3 3.6 5.9	9 1.0 17.6		5 9.8 9.8

TABLE 10 (continued)

BASE - TOTAL HOUSEHOLDS TAKING TRIPS TO THAT REGION

Other Activities. Exactly what is being done on a vacation can be described in more detail; these activities are classified into two groups: Minnesota type and Non-Minnesota type.

The Minnesota type activities that are most popular are camping and fishing in the outdoors and ball games, conventions, shopping and the theatre. These Minnesota type activities in total account for 17 percent of all vacations.

Non-Minnesota type activities account for 20 percent of all vacation activities. The most popular of this type are Amusement Parks, (like Disneyland or other "theme" parks; no mention was made of Valley Fair) and simply to "relax". Certainly Minnesota can provide the surroundings to relax. See Table 11.

Summary. June and July are the most heavily traveled months; a week is about the average length of stay, however, short weekend trips are very important. Michigan and Wisconsin are most frequently the destination state for a vacation, and most travelers visit family or friends, pursue a summer outdoor activity and/or sightsee.

Q.2 MAIN PURPOSE(S) OF THE VACATION(S)

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
TOTAL	1438 100.0 7.3	19754 100.0 100.0	3952 100.0 20.0	1843 100.0 9.3	1043 100.0 5.3	798 100.0 4.0	3012 100.0 15.2	1370 100.0 6.9	614 100.0 3.1	223 100.0 1.1	3617 100.0 18.3	221 100.0 1.1	1623 100.0 8.2
MAIN PURPOSE(S) OF THE VACATION(S)													
VISIT FAMILY/FRIENDS	764 53.1 7.5	10130 51.3 100.0	2003 50.7 19.8	928 50.4 9.2	578 55.4 5.7	482 60.4 4.8	1407 46.7 13.9	747 54.5 7.4	349 56.8 3.4	137 61.4 1.4	1764 48.8 17.4	141 63.8 1.4	830 51.1 8.2
OUTDOOR ACTIVITIES													
TOTAL	764 53.1 7.4	10354 52.4 100.0	2042 51.7 19.7	929 50.4 9.0	518 49.7 5.0	388 48.6 3.7	1684 55.9 16.3	690 50.4 6.7	312 50.8 3.0	114 51.1 1.1	1936 53.5 18.7	112 50.7 1.1	865 53.3 8.4
SUMMER	616 42.8 7.3	8464 42.8 100.0	1694 42.9 20.0	775 42.1 9.2	424 40.7 5.0	310 38.8 3.7	1326 44.0 15.7	577 42.1 6.8	259 42.2 3.1	89 39.9 1.1	1612 44.6 19.0	86 38.9 1.0	696 42.9 8.2
WINTER	152 10.6 7.9	1922 9.7 100.0	354 9.0 18.4	157 8.5 8.2	96 9.2 5.0	78 9.8 4.1	365 12.1 19.0	114 8.3 5.9	53 8.6 2.8	27 12.1 1.4	328 9.1 17.1	26 11.8 1.4	172 10.6 8.9
SIGHTSEEING													
TOTAL	611 42.5 7.2	8514 43.1 100.0	1652 41.8 19.4	779 42.3 9.1	478 45.8 5.6	335 42.0 3.9	1353 44.9 15.9	588 42.9 6.9	281 45.8 3.3	98 43.9 1.2	1592 44.0 18.7	84 38.0 1.0	663 40.9 7.8
METRO	307 21.3 7.4	4131 20.9 100.0	827 20.9 20.0	365 19.8 8.8	254 24.4 6.1	140 17.5 3.4	603 20.0 14.6	278 20.3 6.7	146 23.8 3.5	54 24.2 1.3	769 21.3 18.6	40 18.1 1.0	348 21.4 8.4
NON METRO	417 29.0 7.3	5729 29.0 100.0	1131 28.6 19.7	528 28.6 9.2	302 29.0 5.3	247 31.0 4.3	939 31.2 16.4	386 28.2 6.7	188 30.6 3.3	61 27.4 1.1	1054 29.1 18.4	56 25.3 1.0	420 25.9 7.3
OTHER TOTAL													
MN OUTDOOR ACTIVITIES	189 13.1 9.4	2009 10.2 100.0	362 9.2 18.0	183 9.9 9.1	114 10.9 5.7	62 7.8 3.1	344 11.4 17.1	163 11.9 8.1	56 9.1 2.8	18 8.1 .9	323 8.9 16.1	25 11.3 1.2	170 10.5 8.5
LIVE THERE FOR SUMMER		9 100.0	5 55.6	2 22.2			2 22.2						
BOATING	7 .5 6.4	109 .6 100.0	21 .5 19.3	8 .4 7.3	10 1.0 9.2	4 .5 3.7	17 .6 15.6	13 .9 11.9		1 .4 .9	23 .6 21.1		5 .3 4.6

BASE - TOTAL TRIPS

MAIN PURPOSE OF VACATION COMPARED TO STATE OF RESIDENCE

TABLE 11

REGIONAL TOURISM STUDY
STATE OF RESIDENCE
Q.2 MAIN PURPOSE(S) OF THE VACATION(S)

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
CANOEING	8 21.6 100.0	38 100.0	7 18.4	1 2.6	2 5.3	5 13.2	12 31.6	1 2.6	1 2.6		1 2.6		
CAMPING	66 4.6 9.1	727 3.7 100.0	110 2.8 15.1	64 3.5 8.8	44 4.2 6.1	11 1.4 1.5	138 4.6 19.0	50 3.6 6.9	17 2.8 2.3	10 4.5 1.4	143 4.0 19.7	9 4.1 1.2	65 4.0 8.9
FISHING	65 4.5 9.9	655 3.3 100.0	135 3.4 20.6	66 3.6 10.1	52 5.0 7.9	28 3.3 4.3	68 2.3 10.4	78 5.7 11.9	29 4.7 4.4	2 .9 .3	85 2.4 13.0	6 2.7 .9	41 2.3 6.3
GOLF	15 1.0 9.3	162 .8 100.0	30 .8 18.5	15 .3 9.3	5 .5 3.1	1 .1 .6	28 .9 17.3	13 .9 8.0	2 .3 1.2	4 1.8 2.5	40 1.1 24.7	2 .9 1.2	7 .4 4.3
HUNTING	21 1.5 10.6	199 1.0 100.0	26 .7 13.1	14 .8 7.0	4 .4 2.0	7 .9 3.5	46 1.5 23.1	10 .7 5.0	3 .5 1.5	2 .9 1.0	22 .6 11.1	6 .7 3.0	38 2.3 19.1
WATER SKIING	2 11.1	18 100.0			3 16.7	2 11.1	4 22.2	1 5.6		1 5.6	2 11.1		3 16.7
SNOW SKIING, DOWN- HILL													
SNOW SKIING, CROSS COUNTRY	3 75.0	4 100.0					1 25.0						
SNOW SKIING, UNSPECIFIED													
SKIING, UNSPECIFIED	7 8.0	87 100.0	20 23.0	5 5.7	4 4.6	8 1.0 9.2	16 18.4	10 11.5	4 4.6		3 3.4	1 1.1	9 10.3
HIKING	4 11.1	36 100.0	3 8.3	5 13.9	2 5.6		5 13.9	3 8.3	2 5.6		9 25.0	1 2.8	2 5.6
SNOWMOBILING	2 11.1	18 100.0	8 44.4	1 5.6			3 16.7				1 5.6	1 5.6	2 11.1
ROCK HUNTING	3 75.0	4 100.0							1 25.0				
FALL SCENERY/COLORS	8 9.2	87 100.0	19 21.8	12 13.8	5 5.7	2 2.3	18 20.7	3 3.4			13 14.9		7 8.0

BASE - TOTAL TRIPS

TABLE 11 (continued)

STATE OF RESIDENCE
Q.2 MAIN PURPOSE(S) OF THE VACATION(S)

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
MN URBAN ACTIV- ITIES	82 5-7 6-2	1323 6-7 100-0	249 6-3 18-8	136 7-4 10-3	81 7-8 6-1	47 5-9 3-6	196 6-5 14-8	88 6-4 6-7	54 8-8 4-1	14 6-3 1-1	251 6-9 19-0	26 11-8 2-0	99 6-1 7-5
BALL GAMES	6 1-4 3-2	188 1-0 100-0	23 1-6 12-2	24 1-3 12-8	20 1-9 10-6	11 1-4 5-9	20 1-7 10-6	16 1-2 8-5	13 2-1 6-9	1 1-4 -5	41 1-1 21-8	7 3-2 3-7	6 -4 3-2
CONVENTION/CON- FERENCE	18 1-3 8-2	219 1-1 100-0	41 1-0 18-7	26 1-4 11-9	18 1-7 8-2	8 1-0 3-7	33 1-1 15-1	14 1-0 6-4	6 1-0 2-7	3 1-3 1-4	31 1-9 14-2	3 1-4 1-4	18 1-1 8-2
SHOPPING	44 3-1 6-2	705 3-6 100-0	118 3-0 16-7	71 3-9 10-1	37 3-5 5-2	23 2-9 3-3	115 3-8 16-3	43 3-1 6-1	29 4-7 4-1	9 4-0 1-3	147 4-1 20-9	16 7-2 2-3	53 3-3 7-5
MUSEUM/ART GALLERIES	1 1-1 2-4	41 1-2 100-0	7 1-2 17-1	5 1-3 12-2	2 1-2 4-9	2 1-3 4-9	1 1-2 2-4	3 1-2 7-3	3 1-5 7-3	1 1-4 2-4	12 1-3 29-3	1 1-5 2-4	3 1-2 7-3
THEATRE/PLAYS	13 1-9 5-4	242 1-2 100-0	75 1-9 31-0	18 1-0 7-4	10 1-0 4-1	6 1-8 2-5	37 1-2 15-3	14 1-0 5-8	6 1-0 2-5	2 -9 -8	35 1-0 14-5	1 -5 -4	25 1-3 10-3
VOYAGER NATIONAL PARK	1 1-1 50-0	2 1-1 100-0			1 1-1 50-0								
MINNESOTA STATE ZOO		8 100-0	1 12-5	1 12-5			1 12-5					3 1-4 37-5	2 1-1 25-0
NON MN ACTIVITIES	289 20-1 7-3	3984 20-2 100-0	808 20-4 20-3	417 22-6 10-5	179 17-2 4-5	148 18-5 3-7	609 20-2 15-3	258 18-8 6-5	136 22-1 3-4	45 20-2 1-1	765 21-2 19-2	44 19-9 1-1	286 17-6 7-2
BOWLING	1 1-1 1-7	60 1-3 100-0	11 18-3	5 8-3	2 3-2		8 13-3	6 10-0	2 3-3		15 25-0	2 3-3	8 13-3
ALL OTHER SPORTS ACTIVITIES	31 2-2 8-6	362 1-8 100-0	71 1-8 19-6	46 2-5 12-7	19 1-8 5-2	13 1-6 3-6	33 1-1 9-1	31 2-3 8-6	7 1-1 1-9	9 4-0 2-5	74 2-0 20-4	5 2-3 1-4	23 1-4 6-4
AT THE BEACH/LAKE	18 1-3 9-9	181 1-9 100-0	18 9-5 9-9	14 7-8 7-7	7 3-9	1 -6	23 12-7	21 11-6	4 2-2	6 3-3	56 30-9		13 7-2
AMUSEMENT PARKS/ AREAS	9 2-6 2-9	307 1-6 100-0	65 1-6 21-2	47 2-6 15-3	10 1-0 3-3	9 1-1 2-9	70 22-3 22-8	21 1-5 6-8	8 1-3 2-6	1 -4 -3	57 1-6 18-6	1 -5 -3	9 2-6 2-9

BASE - TOTAL TRIPS

TABLE 11 (continued)

REGIONAL TOURISM STUDY
STATE OF RESIDENCE
Q.2 MAIN PURPOSE(S) OF THE VACATION(S)

	STATE OF RESIDENCE												
	MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
CRUISE/BOAT TRIP	9 2.6 9.6	94 5 100.0	27 7 28.7	9 5 9.6	3 3 3.2	4 5 4.3	12 4 12.8	3 2 3.2	4 7 4.3		17 5 18.1	1 5 1.1	5 3 5.3
HISTORIC SITES	4 3 4.5	89 5 100.0	14 4 15.7	9 5 10.1	3 3 3.4	3 4 3.4	16 5 18.0	6 4 6.7	2 3 2.2	1 4 1.1	27 7 30.3	1 5 1.1	3 2 3.4
SIGHTSEEING, GEN- ERALLY	30 2.1 6.3	477 4 100.0	69 7 14.5	52 8 10.9	22 1 4.6	22 8 4.6	89 0 18.7	31 3 6.5	22 6 4.6	2 9 .4	90 5 18.9	6 5 1.3	42 6 8.8
ALL OTHER SPECIFIC SIGHTSEEING AREAS/ PLACES	37 2.6 6.2	593 0 100.0	88 2 14.8	59 2 9.9	28 7 4.7	29 6 4.9	81 7 13.7	37 2 6.2	30 9 5.1	3 3 .5	137 8 23.1	6 7 1.0	58 6 9.8
FUN/PLEASURE/RELAX.	90 6.3 9.6	933 7 100.0	223 6 23.9	93 0 10.0	31 0 3.3	24 0 2.6	151 0 16.2	48 5 5.1	24 9 2.6	15 7 1.6	170 7 18.2	7 2 .8	57 5 6.1
HOLIDAY/SPECIAL OCCASION	14 1.0 6.8	205 0 100.0	46 2 22.4	21 1 10.2	13 2 6.3	11 4 5.4	34 1 16.6	15 1 7.3	5 8 2.4	5 2 2.4	26 7 12.7	1 5 .5	14 9 6.8
HEALTH REASONS	4 3 9.1	44 2 100.0	11 3 25.0	3 2 6.8	4 4 9.1		2 1 4.5	2 1 4.5	1 2 2.3	1 4 2.3	10 3 22.7	4 8 9.1	2 1 4.5
ALL OTHER HOBBIES	2 1 3.6	56 3 100.0	6 2 10.7	11 6 19.6	1 1 1.8	4 5 7.1	4 1 7.1	10 7 17.9			11 3 19.6	1 5 1.8	6 4 10.7
TRANSPORTING CHILD- REN	2 1 4.2	48 2 100.0	10 3 20.8	7 4 14.6	1 1 2.1	4 5 8.3	7 2 14.6	5 4 10.4		1 4 2.1	8 2 16.7	1 5 2.1	2 1 4.2
ALL OTHER ENTERTAIN- MENT	22 1.5 8.4	263 3 100.0	69 7 26.2	12 7 4.6	13 2 4.9	10 3 3.8	41 4 15.6	10 7 3.8	18 9 6.8	4 8 1.5	46 3 17.5		18 1 6.8
ALL BUSINESS RELATED	9 6 9.1	99 5 100.0	25 6 25.3	9 5 9.1	4 4 4.0	4 4 4.0	17 6 17.2	4 3 4.0	5 8 5.1		11 3 11.1	4 8 4.0	7 4 7.1
ALL OTHERS	20 1.4 4.7	423 1 100.0	100 5 23.6	49 7 11.6	24 3 5.7	24 0 5.7	56 9 13.2	27 0 6.4	15 4 3.5	4 8 .9	67 9 15.8	7 2 1.2	30 8 7.1
NO ANSWER	4 3 4.9	82 4 100.0	8 2 9.8	9 5 11.0	6 6 7.3	4 5 4.9	13 4 15.9	10 7 12.2	4 7 4.9		15 4 18.3	1 5 1.2	8 5 9.8

BASE - TOTAL TRIPS

TABLE 11 (continued)

STATE OF RESIDENCE
Q.2 MAIN PURPOSE(S) OF THE VACATION(S)

		STATE OF RESIDENCE												
		MIN- NESOTA	TOTAL	ILLI- NOIS	IN- DIANA	IOWA	KANSAS	MICH- IGAN	MIS- SOURI	NE- BRASKA	NORTH DAKOTA	OHIO	SOUTH DAKOTA	WIS- CONSIN
TOTAL		1438 100.0 7.3	19754 100.0 100.0	3952 100.0 20.0	1843 100.0 9.3	1043 100.0 5.3	798 100.0 4.0	3012 100.0 15.2	1370 100.0 6.9	614 100.0 3.1	223 100.0 1.1	3617 100.0 18.3	221 100.0 1.1	1623 100.0 8.2

BASE - TOTAL TRIPS

TABLE 11 (continued)

MINNESOTA VACATION MARKET

The Midwest supplies vacation sites for 10.5 million American families or 14.14 million households each year. This translates to 29.7 million separate trips, half of which, or 14.8 million, are taken in the twelve state Midwestern region. The impact of this tourist trade on Minnesota is particularly high, as indicated by a paper published in the Journal of Travel Research. Minnesota ranks thirteenth in the nation on a factor referred to as "Tourism Proportion". This factor is derived by dividing travel expenditures in a state by the Gross State Product. The following table shows the ranking of Minnesota and eleven Midwestern states by this factor.

Tourism Proportion Ranking

Minnesota	13
South Dakota	16
North Dakota	20
Nebraska	21
Wisconsin	24
Missouri	26
Michigan	32
Kansas	38
Iowa	39
Illinois	40
Ohio	44
Indiana	47

Minnesota's economy depends on tourist income to a greater extent than any of the other Midwestern states.¹

¹Laurence E. Royer, Stephen F. McCool, John D. Hunt, "The Relative Importance of Tourism to State Economics", Journal of Travel Research, Vol. XXI, No. 4 (Spring 1974), pp. 13-16.

Minnesota's Market Share of Midwestern Vacation Market

Total Trips.

Minnesota ranks fourth in total trips to the Midwest and Canada. Michigan and Wisconsin rank first and second, with 17.5 percent and 17.4 percent, respectively. Minnesota, which closely follows Illinois, accounts for 10.5 percent of Midwestern vacations. The table below, taken from NFO (Table 60), indicates the percentage of trips for each of the Midwestern states and Canada.

<u>State</u>	<u>Percent of Trips</u>
Michigan	17.5
Wisconsin	17.4
Illinois	10.6
Minnesota	10.5
Ohio	9.8
Missouri	9.7
Indiana	6.8
Canada	5.8
Iowa	5.0
South Dakota	2.7
Kansas	2.6
Nebraska	2.3
North Dakota	1.1

In the following section the Minnesota tourist is compared to other
Midwestern tourists. Answers are sought to five basic questions:

1. Who is the Minnesota vacationer?
2. Where do Minnesota tourists come from?
3. What month is the most popular for travel?
4. How long do Minnesota vacationers stay?
5. What are the principal reasons vacationers come to Minnesota?

Characteristics of the Minnesota Vacationer

To answer the question "who is the Minnesota vacationer", a profile can be established similar to that of the Midwestern vacationer. That is, the Minnesota vacationer will be described in terms of the six characteristics that might be related to vacation behavior: Family income, occupation of the head of family, family life cycle stage/age of head of household, education level of head of household, family size and residence location. Figures 9 through 16, developed from the multiscard sample, display the above characteristics for the Minnesota, Wisconsin and Michigan vacationers, as well as all others.

However, "Minnesota Vacationer" must first be defined. A Minnesota vacationer is a vacationer who travels to Minnesota. Therefore, the state of residence does not determine the label on the vacationer -- the destination state does. Similarly, a Wisconsin vacationer is one who travels to Wisconsin.

Income. Minnesota follows the general pattern of the Midwest states when looking at the income categories separately (See Figure 9). Over 50 percent of the trips taken to Minnesota are taken by families with incomes of between \$8,000 and \$20,000. In attracting high income travelers, i.e., travelers with family incomes of over \$30,000, Minnesota (capturing 25.6 percent of the market) ranks third behind Wisconsin (36.4 percent) and Michigan (30.8 percent). Referring back to income and its relationship to travel behavior, it is precisely these higher income brackets that are more likely to travel and to travel most frequently. Presumably, it is these vacationers who have more discretionary money to spend, and to spend it on vacation activities.

Occupation. Figure 10 displays the occupational categories of the Midwest's travellers. The major occupational categories of Minnesota vacationers are: professionals (17.6 percent), craftsmen (16.1 percent) and retired individuals (16.1 percent). There has been some change since 1968; then craftsmen ranked first while professionals ranked second and retired individuals ranked fifth

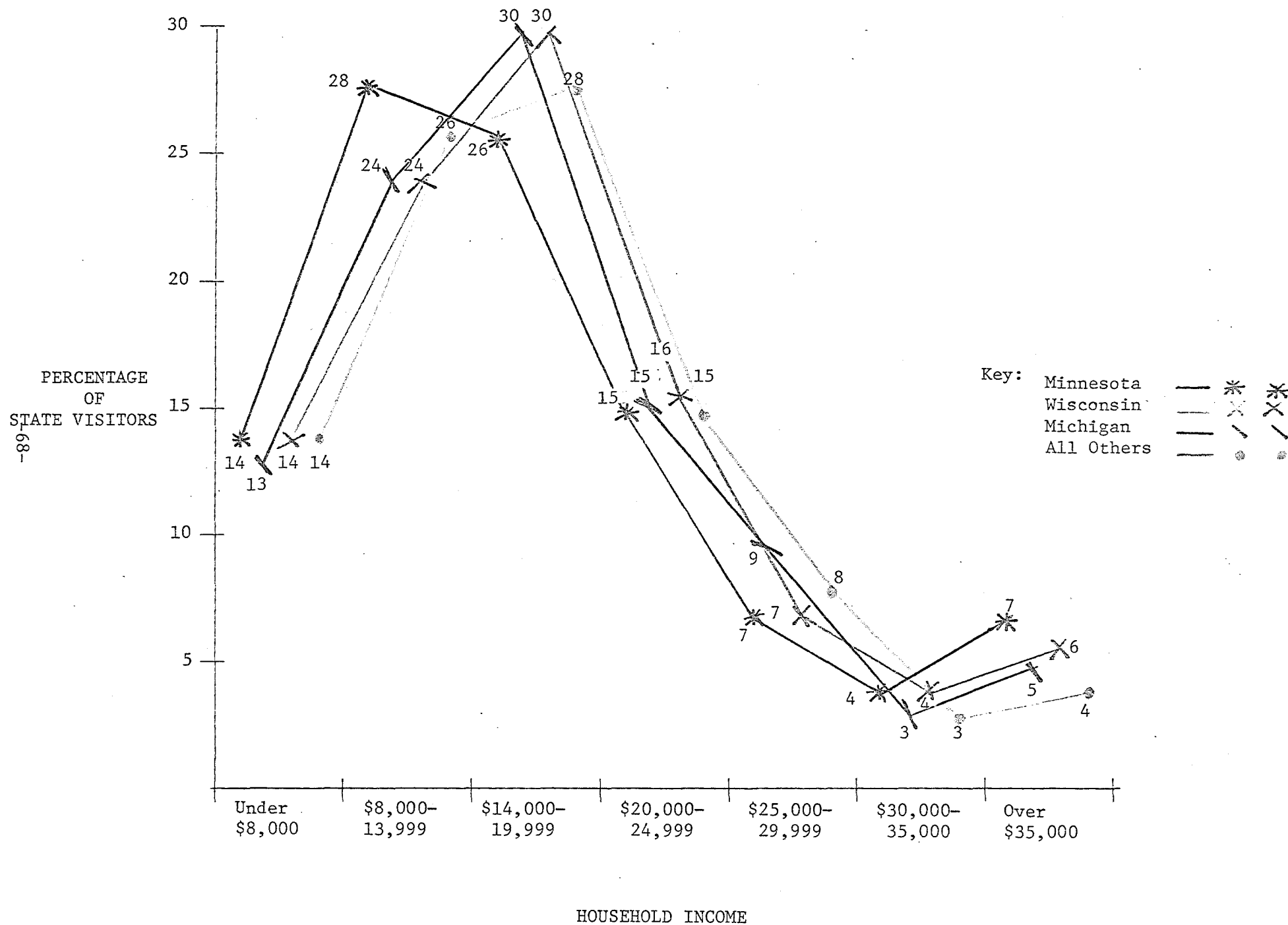


FIGURE 9.

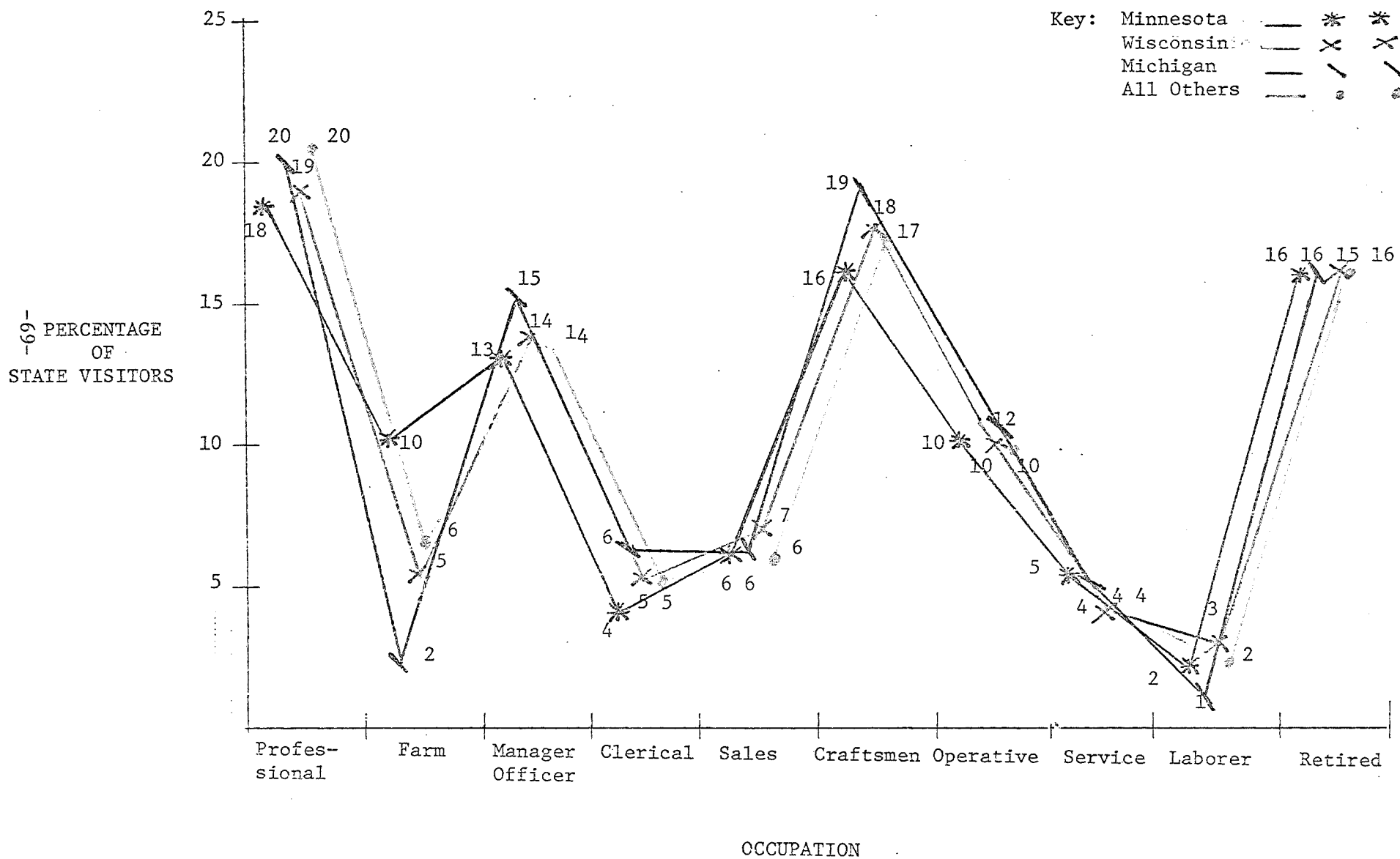


FIGURE 10.

after managers/officers and operatives. Both professionals and retirees are gaining in importance to Minnesota. It is the professionals who are most likely to vacation and travel more often, while retirees are least likely to travel. However, this group (retired individuals) does stay away about three and a half days longer than the average length of stay, and are therefore a viable occupation segment for consideration.

Minnesota is capturing a larger share of the farmer and service categories than average, with 10.1 percent and 5.0 percent respectively (compared to an average of 6.1 and 4.0 percent). The farmer travels about comparable to other categories, while the service occupation members travel with less frequency. So, although Minnesota captures a proportionately large segment of this category -- they do not travel as often or with as large a degree of frequency -- and therefore, the group's importance in terms of attracting more to travel in Minnesota is questionable to the State.

Unfortunately, Minnesota is not enticing its share of professionals, managers/officers or clericals to vacation in the state. Professionals are Minnesota's most important group, but the size of this group is not as large as it could be. The average is 19.9 percent, whereas Minnesota captures only 17.6 percent. Managers/Officials generally account for about 13.6 percent, but in Minnesota total 12.6 percent. Clericals are only 5.3 percent of the market, and Minnesota attracts an even smaller 4.3 percent.

Wisconsin is capturing a proportionately larger share of salesmen, craftsmen and laborers; Michigan attracts a larger share of managers/officers, craftsmen and operatives. Salesmen and laborers are not frequent travellers, whereas managers/officers and operatives are more numerous (13.6 and 10.4 percent of the market, respectively). Again, craftsmen are a significant segment of the market with a 16.6 percent share.

Life cycle/Age. Figures 11 and 12 summarize the vacationer by stage in the family life cycle and age of the head of household. Minnesota travellers are fairly evenly spread over the age groups from 25 years and over. The "under 25" group represents a very small percentage of the vacation population because of the small number of families in that age group.

Minnesota is above average in the age groups of 25 - 29, 55 - 59, and 65 and over. The 55 - 59 age group travels frequently, with 47 percent of this group taking two or more vacations per year. The 25 - 29 age group is less important, while the 65 and over travels least of all age groups. Almost 42 percent of this group take no vacations.

Minnesota is lower than average in the under 25, 30 - 34, and 45 - 49 age groups. Both the 30 - 34 and 45- 49 age groups are important, with at least 42 percent taking two or more vacations, respectively.

Wisconsin is above average in the under 25, 35 - 39, 45 - 54 and 60 - 64 age group; while Michigan is above average in the under 25, 25 - 29, 30 - 34 and 35 - 39 age groups. Those that are very important because of their frequency of travel are those groups between 30 and 64 -- each group within this range of ages has at least 40 percent who take two or more vacations.

Life cycle stage was highly correlated to vacation behavior, with more vacations being taken as stage in life cycle increases. This is very good for Minnesota, which attracts a larger than proportionate share of working older couples. Minnesota has 22.8 percent as compared to the average of 19.6 percent. Minnesota is under average in the Young Parent category, yet these respondents are the least likely to vacation. Therefore, this below average group is not a critical problem area for Minnesota.

Wisconsin is above average in the older parent category, a group that travels about average when compared to the other life cycle categories. Michigan is above average in every category but working older couple and retired couple. This gives

PERCENTAGE
OF
STATE VISITORS

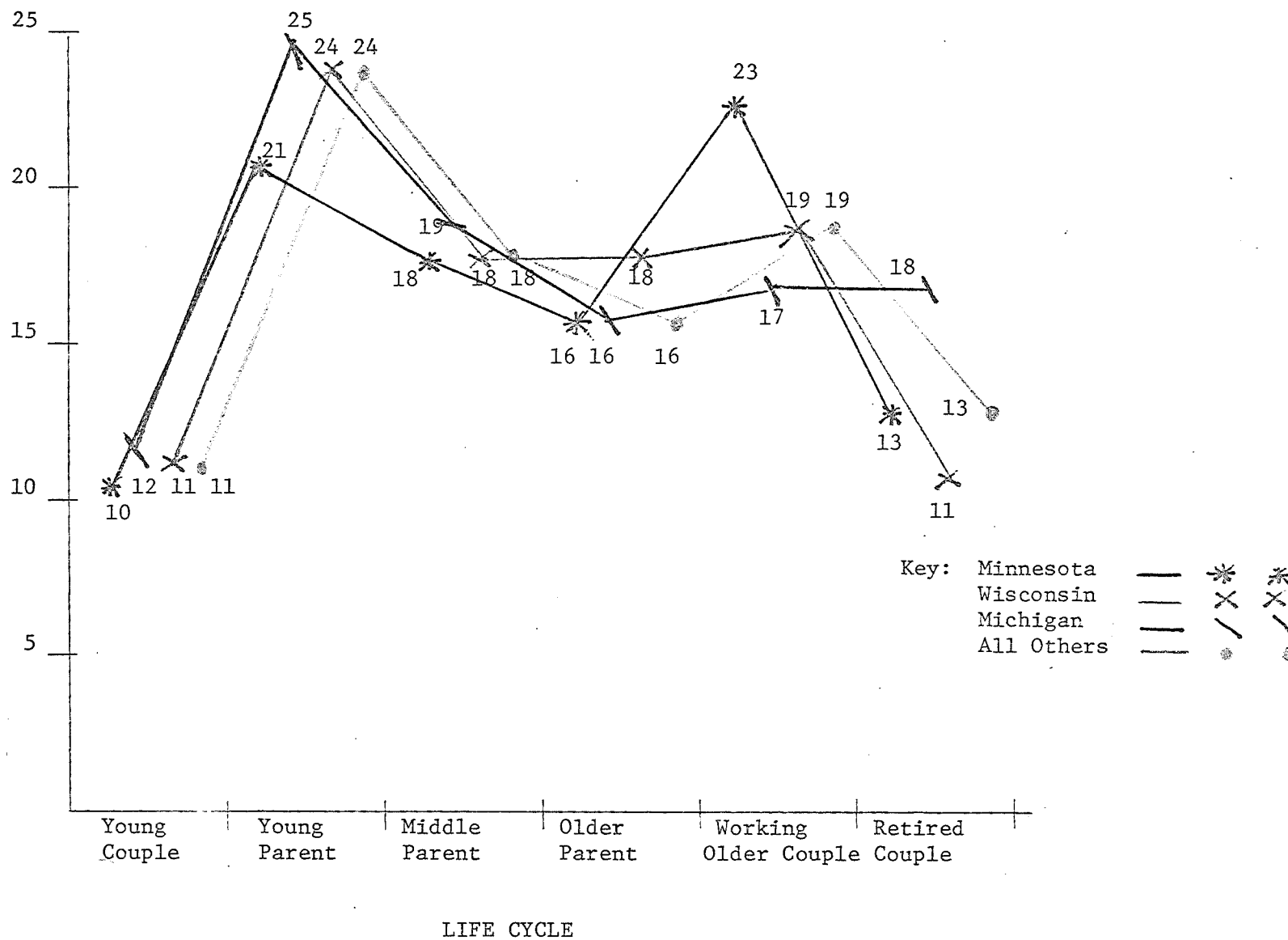


FIGURE 11.

PERCENTAGE
OF
STATE VISITORS

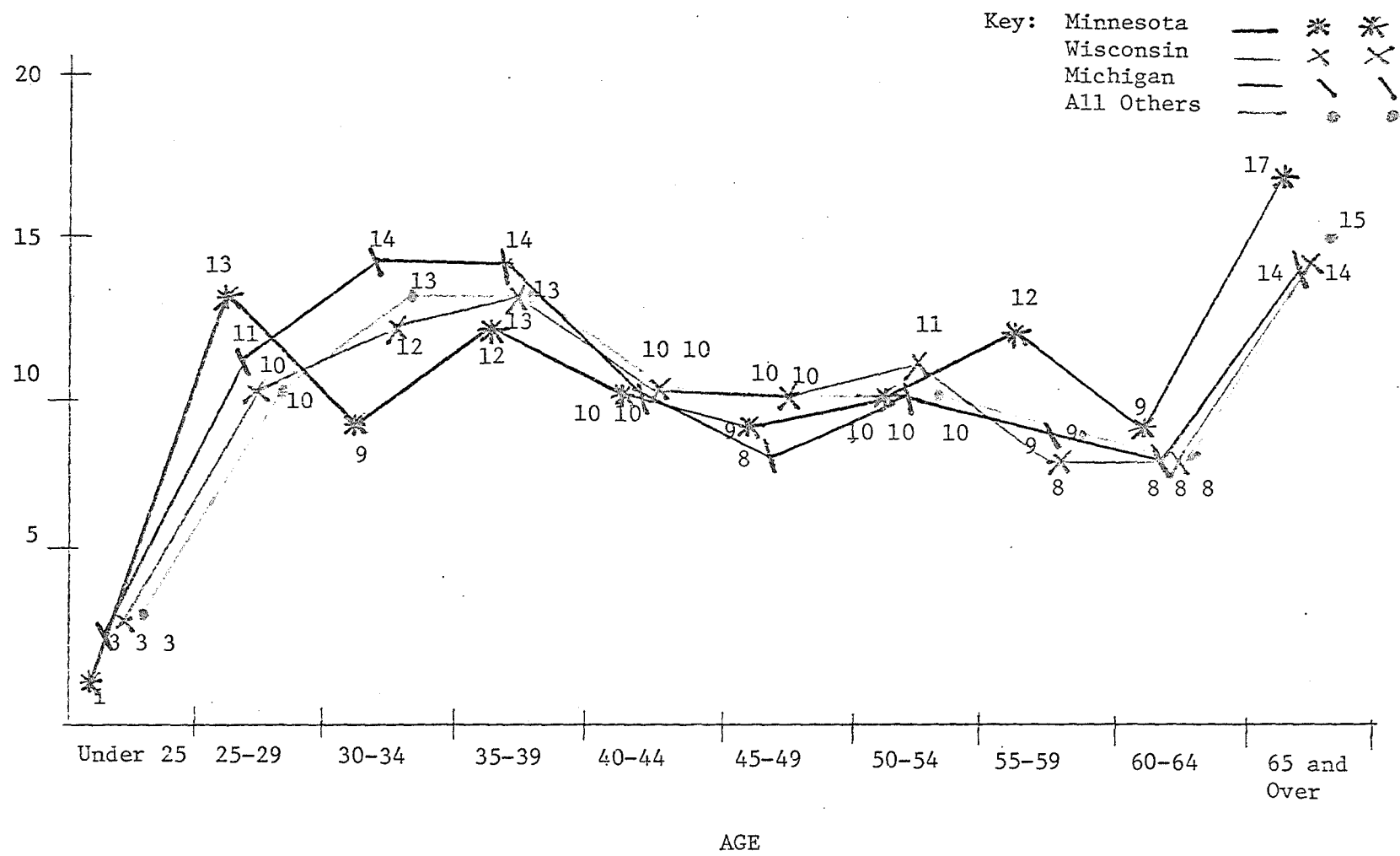


FIGURE 12.

Michigan a strong market share of families that travel frequently.

Educational Level. Minnesota attracts its share of each educational level, as shown in Figure 13. The exception to this is in the "Not high school grad" category, in which Minnesota attracts 19 percent, compared to the average share of 16.8 percent. This group, however, takes the fewest vacations per family and the smallest number of vacations of the five "education level" segments and, therefore expansion of the market share in this group may not be possible or important to Minnesota to any great degree.

Wisconsin also attracts a larger than proportionate share of "Not high school grads", in addition to high school grads and members in the some college category. These latter two are of increasing importance in numbers of trips. Michigan has an even more ideal situation, in that it attracts both vacationers in the some college and college and grad groups. Again, educational level is positively related to vacation behavior -- the higher the education level, the more the travel. Michigan is attracting the best groups, because they travel more often.

Family Size. Minnesota attracts a larger than proportionate share of two member families, displayed in Figure 14. It is slightly below the norm in the three member and five or more members. Neither Michigan or Wisconsin deviate much from the average market shares. As discussed in the Midwest Market section, family size does not correlate at all with vacation behavior. Therefore, although Minnesota does attract more than its share of two member families, these people do not vary significantly in their travel behavior.

Location/City of Residence. Minnesota entices a much larger share of rural residents than the average share. Figure 15 shows that Minnesota has 42 percent from rural areas, while the average is 33 percent. Minnesota is also above average in the share of 2,000,000 and over category, 33.8 compared to 30.1 percent average. In terms of benefits to Minnesota, these two larger than average groups cancel each other out. The 2,000,000 and over group are the most likely to travel, but the

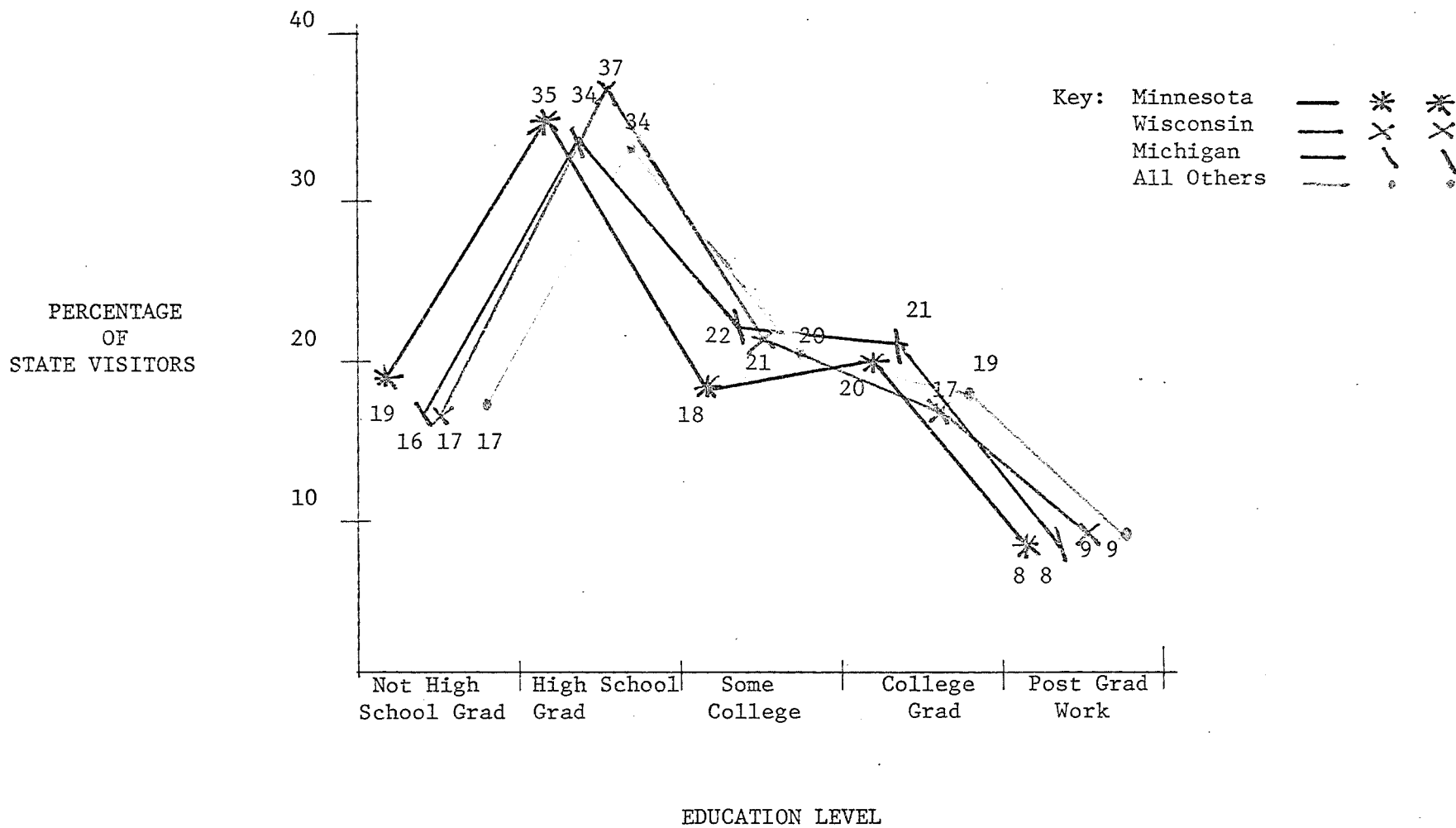


FIGURE 13.

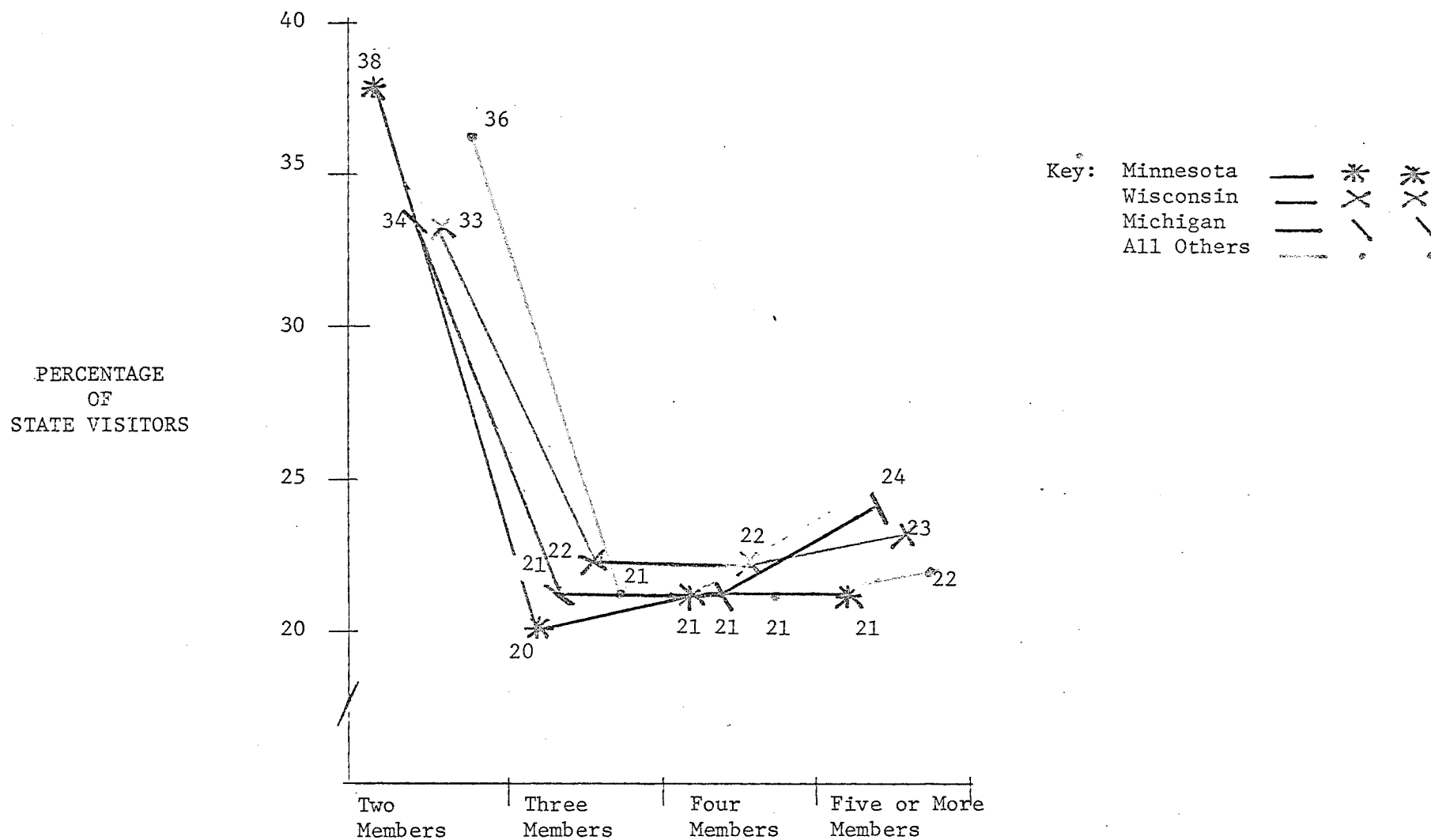


FIGURE 14.

FAMILY SIZE

PERCENTAGE
OF
STATE VISITORS

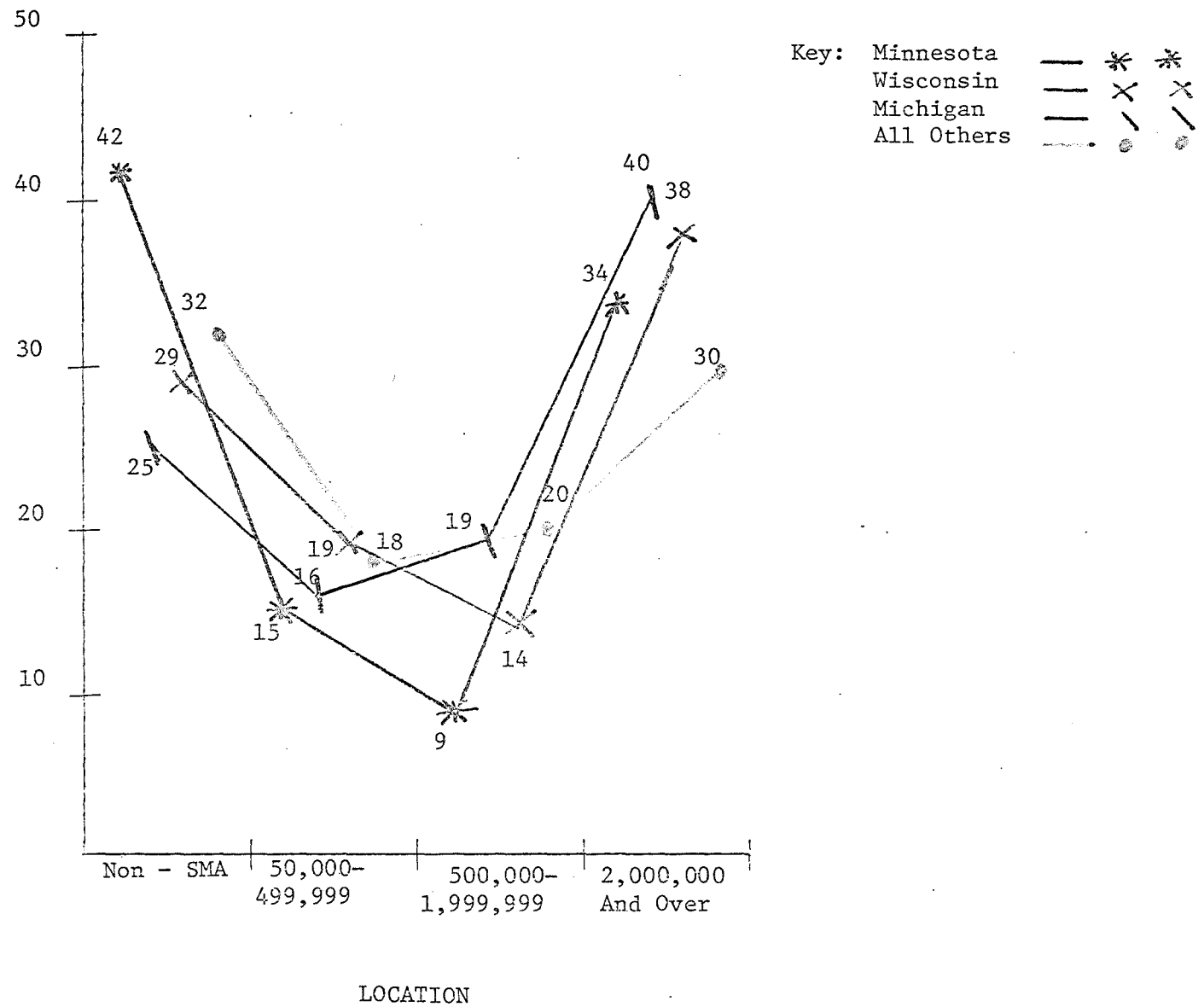
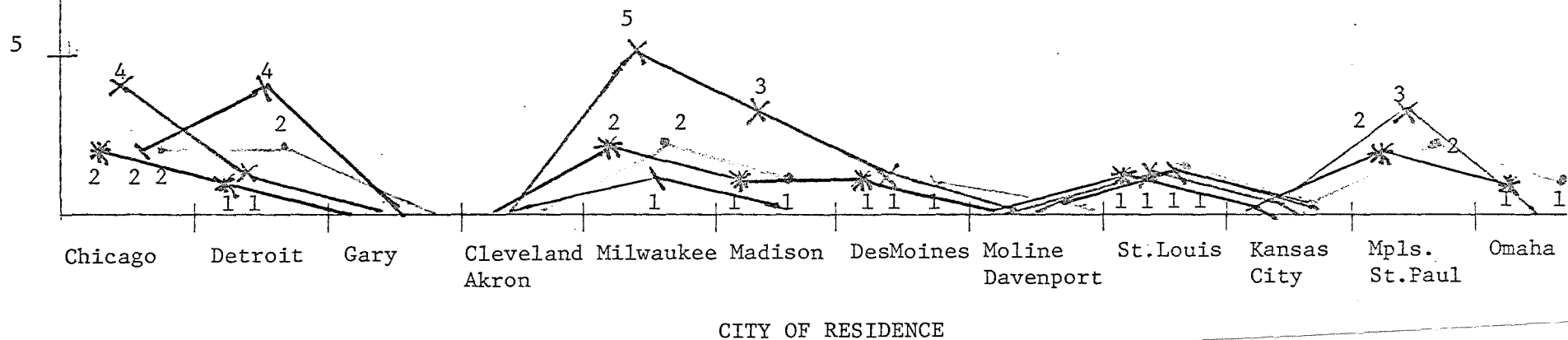


FIGURE 15.

PERCENTAGE
OF
STATE VISITORS

Key: Minnesota *
Wisconsin x
Michigan /
All Others .



rural group is the least likely to travel. Minnesota is lower in the remaining two groups, quite significantly in the 500,000 - 1,999,999 group. Minnesota has a market share of 8.6 percent compared to the average of 18.7 percent. This group is second in number of vacations and could be important to Minnesota.

Cities of 2,000,000 and over account for 30.1 percent of all vacationers. Minnesota attracts a large share, at 33.8 percent. Michigan and Wisconsin particularly receive a larger share of vacationers from cities of this size, with almost half of their tourists coming from large cities.

Wisconsin gets its vacationers from Chicago, Milwaukee, Madison and Minneapolis/St. Paul. Michigan attracts those from Detroit primarily, with Milwaukee being also a bit above average.

Summary. Who is the Minnesota vacationer can now be answered. The Minnesota vacationer as compared to other Midwestern vacationers is higher than average in the following segments:

- (1) Income - Above \$30,000
- (2) Occupation - Farmer, Service
- (3) Life Cycle/Age - Working Older Couples, 25-29, 55-59, over 65
- (4) Educational Level - Not high school grad
- (5) Family size - Two members
- (6) Location of Residence - Non SMA, 2,000,000 and over

However, the Minnesota vacationer is lower than average when compared to other Midwest vacationers in the following categories:

- (1) Income - \$25,000 - 29,999
- (2) Occupation - Professional, Manager/Officer, Clerical
- (3) Life cycle/Age - Young Parent
- (4) Educational Level - Some college, Post grad
- (5) Family Size - Three members, Five or more members
- (6) Location of Residence - 50,000 - 1,999,999

Areas for improvement are Professionals, Post grads and the residents of cities with populations of 500,000 to 1,999,999. These categories are important because Minnesota is not getting its share of these groups and yet they are very valuable because they are most likely to vacation and to vacation frequently.

Vacation Description

Again, although the Minnesota vacationer has been described and understood, the task has only been half completed. Now answers must be found to the remaining questions:

- Where do Minnesota tourists come from?
- What month is the most popular for travel?
- How long do they stay?
- What are the principle reasons these vacationers come to Minnesota?

Combining the more specific information about both the Minnesota vacationer and his vacation will provide a detailed basis for Minnesota to use in improving market segmentation, advertising and promotion.

State of Residence

Table 12 exhibits the sources of vacationers within the Midwest region for the three lake states: Minnesota, Wisconsin and Michigan.

Minnesota. Minnesota vacationers come from all the states in the Midwest area. Illinois (151), Iowa (129), and Wisconsin (110) send the largest number of vacationers to Minnesota; and, of course, Minnesota itself is the largest source of Minnesota vacationers. This has proportionately not changed much since 1968. Illinois, Indiana, North Dakota and Wisconsin are larger sources than previously; while Kansas, Michigan, Missouri and South Dakota are sending fewer numbers proportionately. However, in total, Minnesota still retains the 23 percent of the Lake States market it did in 1968.

Wisconsin. Wisconsin also draws vacationers from all of the Midwestern states. Minnesota (180), Illinois (695), and Michigan (110) are the largest sources for Wisconsin vacations. Wisconsin, however, is similar to Minnesota in that it is a large source at 615. During the last ten years, Wisconsin has experienced a 4 percent increase in share of the Lake States Market, from 34 to 38 percent

TABLE 12

COMPARISON OF STATE OF RESIDENCE OF FAMILIES
VACATIONING IN MINNESOTA, WISCONSIN, AND MICHIGAN
1978 VERSUS 1968

STATE OF RESIDENCE	DESTINATION FOR VACATION					
	MINNESOTA		WISCONSIN		MICHIGAN	
	1978	1968	1978	1968	1978	1968
MINNESOTA	459	178	180	55	29	13
ILLINOIS	151	55	695	207	250	119
INDIANA	36	12	54	20	152	56
IOWA	129	48	83	26	19	5
KANSAS	11	10	6	2	6	2
MICHIGAN	24	14	110	24	1,006	485
MISSOURI	25	12	29	6	28	6
NEBRASKA	47	20	9	3	6	2
NORTH DAKOTA	56	20	7	3	2	1
OHIO	21	8	42	17	252	95
SOUTH DAKOTA	34	16	6	1	1	--
WISCONSIN	110	37	615	275	91	37
TOTAL	1,103	430	1,836	639	1,842	821
Number of Families*	1,213,300	860,000	2,019,600	1,278,700	2,026,200	1,642,000
Percentage of Lake State Vacationers	23%	23%	38%	34%	39%	43%

* 1968 Multiplier = 2,000 families
1978 Multiplier = 1,100 families

Michigan. Michigan, on the other hand, has experienced a 4 percent decline in market share. It still remains the "leader", however, that lead has shrunk from 43 to 39 percent, only 1 percent greater than Wisconsin. Big sources of vacationers are Illinois (119), Indiana (152), and Ohio (252). By a very large margin, Michigan is the largest source of vacationers with 1006.

Seasonal Travel Patterns in the Midwest, Minnesota and competing states

Travel to Minnesota reflects the average in seasonal travel patterns in all other Midwestern states. The most popular season for travel is the Summer, as indicated by data on 1978 vacations. The second most popular season in which trips were made to Minnesota, or to any state in the region, is during the Fall.

Table 13 indicates how Minnesota's seasonal distribution compares to those of competing states and to the regional, or average distribution. Minnesota's distribution is almost identical to those of Wisconsin and Michigan, indicating above-average travel to Lake states during the Summer months. Fifty-five percent of all Minnesota vacations occurred in the Summer, compared to the average of 52 percent for all other regional states. Another 27 percent of all visits to Minnesota were made during the Fall, slightly below the average of 28 percent. Minnesota and the other Lake states, however, fell below the average in attracting visitors during the Spring months, while figures were average during the Winter months. Perhaps Minnesota's promotional efforts should be directed towards attracting winter sports enthusiasts while stressing prompt snow removal efforts that are made in this state. Hopefully, this would increase Minnesota's share of Winter vacations, a season in which Michigan is currently attracting more vacationers.

Of Minnesota's neighboring states, Iowa's distribution of vacations is most similar to the average for the Spring and Fall seasons. This is probably due to the fact that it is the southernmost of Minnesota's competing states and offers a longer season of warm weather. Support for this is demonstrated by Nebraska figures, where 21 percent of all visits to that state occurred in the Spring. This figure was significantly higher than the 11 percent reported for Minnesota.

TABLE 13.

SEASONAL TRAVEL PATTERNS

STATE	FALL QUARTER (SEPT-NOV)	WINTER QUARTER (DEC-FEB)	SPRING QUARTER (MAR-MAY)	SUMMER QUARTER (JUNE-AUG)	TOTAL
MINNESOTA	27%	6%	11%	55%	100
WISCONSIN	27	6	12	55	100
MICHIGAN	27	7	12	55	100
IOWA	28	8	15	49	100
SOUTH DAKOTA	22	7	9	62	100
NORTH DAKOTA	31	5	8	55	100
*AVERAGE	28	6	13	52	100

*Represents the average for all Midwestern states excluding Minnesota

South Dakota's seasonal traffic is somewhat different from Minnesota's other competitive states'. Sixty-two percent of all vacations to that state occur during the Summer months. However, that state's Fall tourist business fell below the average for the region in 1978.

Monthly Travel Patterns in the Midwest, Minnesota, and the Lake States

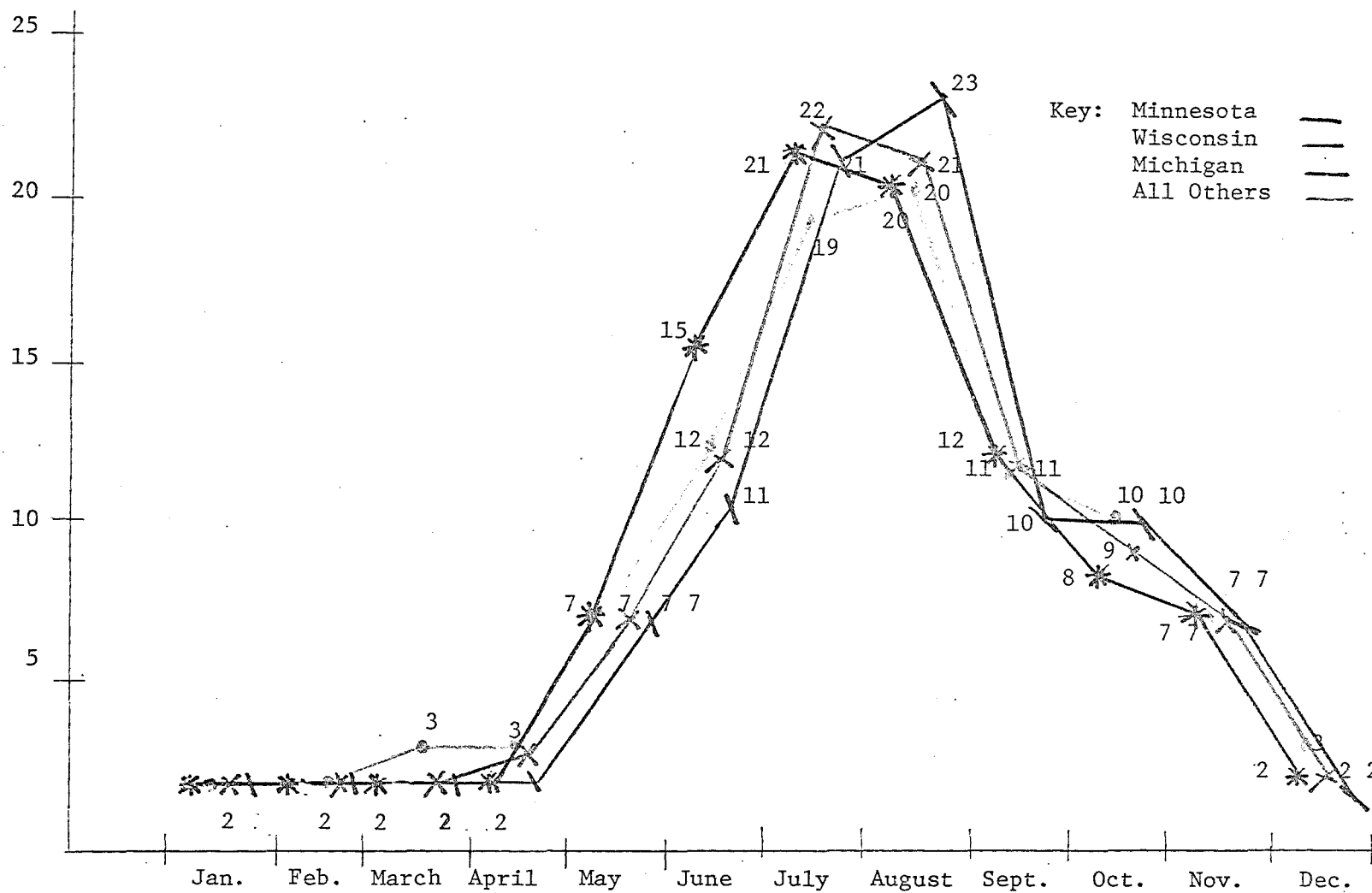
The most popular month for travel in 1978 was August. This was based on an average for all regional states excluding Minnesota. In Minnesota, however, and in all of its neighboring states but Iowa, July attracted most vacationers. August and June were ranked second and third, respectively. Iowa differed from those states in that most travel occurred during the late Summer and continued into the Fall. In Iowa, August was the preferred month for travel, while July, September and October were all ranked above June.

Figure 17 shows the distribution of monthly travel within each of the Lake states, as well as for total states.

Minnesota. Visits to Minnesota during the months of June (15%), July (21%) and September (12%) were above average. Those figures were consistent with the 1968 figures which showed about 35 to 40 percent of vacations by Minnesotans and other Midwesterners started in July or August, about one-sixth began in June, and another one-tenth started in September. Although trips to Minnesota were below the average for all other regional states during the months of April and October, neither Wisconsin nor Michigan reported above average figures for those months. In fact, of the competing states, only North Dakota reported an above average figure for either of those months, and it was for the month of October.

Wisconsin. Visits to Wisconsin during the months of July (22%), August (21%) and September (11%) were above average. Although June was not an above average month in Wisconsin, as it was in Minnesota, visits to Wisconsin were above average for the month of August.

PERCENTAGE
OF
STATE VACATIONS



MONTH OF TRAVEL

FIGURE 12

Michigan. July was the only month where visits to both Minnesota and Michigan (21%) were above average. August (23%) was another above-average month for Michigan. However, while June and September were good months for travel within the state of Minnesota, Michigan figures were below average; and Michigan fell behind Wisconsin in attracting its market share of Midwest tourists.

Whether or not Minnesota's promotional efforts drop off during August, there seems to be no reason why the state cannot continue to attract an above average number of visits during the month of August as do the other Lake states.

How Long Are Minnesota Vacations Compared to Those in Other States

To determine how Minnesota compared to the other regional states in terms of "vacation length", vacations have been grouped for convenient comparison. Any trip lasting from one to four days was considered a "weekend" visit, while any trip lasting between five and nine days was designated as a "week-long" vacation. "Two-week" trips were those running between ten and fourteen days, and the remainder were labeled vacations of "over two weeks". Table 14 shows how Minnesota compared to the entire Midwest region and the other states in terms of "vacation length" for 1978.

Brief trips were the most popular among Midwest tourists in 1978, with 60 percent of all vacations being "weekenders". Another 28 percent of Midwest trips were week-long vacations. Weekend visits to Minnesota accounted for only 52 percent of this state's total vacations, while one-third were of a week's duration.

South Dakota and the other Lake states reflected a pattern similar to Minnesota's and reported an above average number of week-long vacations but a below average number of brief, weekend trips. Perhaps visitors to these states must travel too great a distance to make weekend trips feasible. For instance, for out-of-state travelers, a trip to Northern Minnesota may require more time than a trip to Iowa. Another possible explanation is that tourists may wish to spend more days on a lake vacation than had they made the trip solely for the purpose of visiting family or friends. In Iowa and North Dakota about 70 percent of all trips were made to visit family and friends, and more travelers came shorter

TABLE 14.

LENGTH OF VACATIONS

STATE	WEEKEND (1-4 days)	WEEK (5-9 days)	TWO-WEEK (10-14 days)	OVER TWO WEEKS (15+ days)	TOTAL
MINNESOTA	52%	33%	11%	3%	100%
NORTH DAKOTA	66	22	8	4	100
SOUTH DAKOTA	48	36	12	3	100
IOWA	70	23	4	4	100
MICHIGAN	52	34	10	3	100
WISCONSIN	57	32	8	2	100
MIDWEST REGION	60	28	8	3	100

distances, i.e., from within the states or from states contiguous to their borders. These reasons may explain why North Dakota and Iowa reported that 66 and 70 percent of all visits to these respective states were weekend trips.

As indicated by Table 15, there has been a substantial increase in the number of weekend visits made to Minnesota since 1968. A ten-year trend of length of vacations in Minnesota is reflected by this table. The rise in weekend trips might be explained by the fact that various Mondays throughout the year have now been proclaimed legal holidays. This means that in 1978 more three-day weekends were available for travel than in 1968. Although the number of visits lasting nine to fourteen days has decreased in Minnesota since 1968, vacations lasting two weeks or longer in the state were still above the Midwest average in 1978.

TABLE 15.

LENGTH OF STAY ON MINNESOTA VACATION	DESCRIPTION OF LENGTH OF STAY	% OF ALL VACATIONS	
		1978	1968
1 to 2 days	"week-end"	16	6
3 to 5 days	"less than a week"	48	41
6 to 8 days	"about a week"	19	25
9 to 11 days	"about 10 days"	7	12
12 to 14 days	"about 2 weeks"	6	12
15 or more days	"more than 2 weeks"	4	4
Total		100	100

Major Purposes of Vacations in the Midwest, Minnesota, and the Lake States

"To visit family and friends" was listed as a major purpose for taking 50 percent of all vacations in the Midwest. Another 47 percent of all Midwest trips were taken for the purpose of participating in Summer Outdoor Activities. Minnesota attracted vacationers for those same reasons. In fact, Minnesota figures were above average; the average was based on vacations in all regional states excluding Minnesota. Fifty-three percent of the trips to Minnesota were for the purpose of enjoying Summer Outdoor Activities, and another 52 percent were spent visiting family and friends. Other activities for which Minnesota ranked above average included Metro Sightseeing (15%) and Winter Outdoor Activities (8%). It is surprising, given the state's reputation for beautiful scenery, that only 21 percent of Minnesota vacations were for the purpose of Non-Metro Sightseeing, a reason listed for 25 percent of all other Midwestern vacations.

In each of Minnesota's neighboring states but Wisconsin, "to visit family and friends" was given as a reason for over 50 percent of the trips to the state. In fact, 72 percent of all North Dakota vacations and 69 percent of all travels to Iowa were for the purpose of visiting family and friends. However, Wisconsin was the only neighboring state that reported, as did Minnesota, an above average number of visits for the purpose of participating in Summer Outdoor Activities (55%). Compared to Minnesota and its neighboring states, South Dakota was far above average in attracting visitors for the purpose of Non-Metro Sightseeing (36%).

The reasons listed for visiting each of the states of Michigan and Wisconsin were similar. "Summer Outdoor Activities" was listed as a purpose for approximately 54 percent of each of those states' vacations, while another 10 percent of the trips to each state were to participate

in Winter Outdoor Activities. Those percentages were slightly above Minnesota's. While Minnesota was below average in attracting travelers for the purpose of Non-Metro Sightseeing, both Michigan (31%) and Wisconsin (27%) reported above average figures. Another distinction between Minnesota and the other two Lake states was that Michigan and Wisconsin were below average in reporting trips designed for the purpose of visiting family and friends. These, and other differences and similarities between the Lake states and the entire region, are reflected in Figure 18.

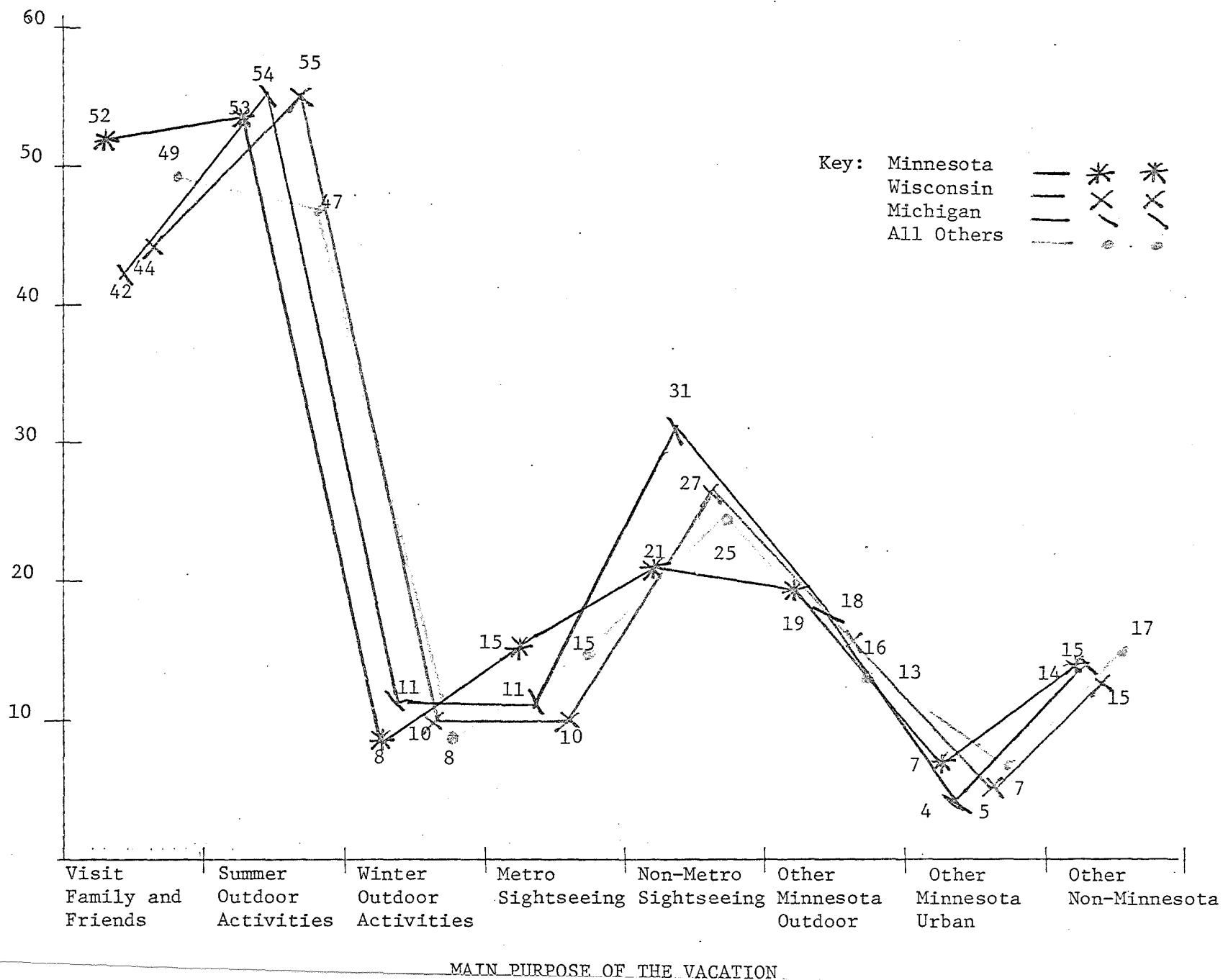
Vacation Activities in Minnesota versus Competing States

Minnesota is preferred to all other regional states by those vacationing for the following purposes: Fishing, Health reasons, Being at the Beach/Lake. Nineteen percent of all fishing trips were spent in Minnesota, while 15 percent and 13 percent were spent in Wisconsin and Michigan, respectively. Minnesota was substantially higher than all other regional states in appealing to those who vacationed for health reasons. This state accounted for 16 percent of those visits, followed by Wisconsin which represented only 5 percent of the total. Of all vacations at the Beach/Lake, 11 percent were spent in Minnesota. Again, the Lake states followed closely, with Michigan representing 9 percent of the total and Wisconsin accounting for 7 percent of all vacations spent at the Beach/Lake. However, this is a significant category in which Minnesota leads the other Lake states.

Although other regional states were preferred to Minnesota for the following vacation reasons, Minnesota still ranked above all of its immediate competitors in attracting visitors for these purposes: Shopping, Ball Games, Museums/Art Galleries, Theatre/Plays. Only Illinois was preferred to Minnesota as a site for shopping. Minnesota attracted 7.2 percent of the

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OF
STATE VISITORS

-46-



total, while Wisconsin and Michigan followed closely, accounting for 7.1 percent and 6.8 percent, respectively. Minnesota represented 5 percent of the trips by those attending ball games, while Iowa accounted for the next most of these visits, 4 percent. However, Illinois, Indiana, Missouri and Ohio are the most popular states for ball game enthusiasts. Minnesota and Michigan each accounted for 5 percent of the regional vacations by Museum/Art Gallery visitors and ranked below Illinois, Missouri and Ohio. Of those who took vacations for the purpose of attending theatre or plays, Minnesota and Wisconsin each represented 4 percent of the regional total. Illinois and Missouri were the most popular destinations for this type of vacation.

Minnesota was behind both Wisconsin and Michigan in attracting visitors who vacationed for the following activities: Golf, Boating, Camping, Water Skiing, Snowmobiling, Fall Scenery, General Sightseeing, Fun/Pleasure/Relaxation. For all these activities, Minnesota has the necessary facilities and natural resources to insure those who vacation a pleasant stay in this state. Apparently promotional efforts are not presently being directed toward those activities. However, it may be wise to begin stressing those features of Minnesota, in hopes of expanding the State's share of these vacations.

Michigan accounted for 17 percent of all boating vacations, while Wisconsin and Minnesota respectively represented 12 percent and 6 percent of those trips. Michigan also led the Lake states in attracting visitors who enjoy the fall scenery (17%). Although Wisconsin followed closely with 16 percent of those trips, Minnesota represented only 10 percent. Michigan was also preferred for General Sightseeing and represented 8 percent of those vacations. Minnesota accounted for 3 percent of the trips designed for that purpose. Ten percent of all golf trips were to Wisconsin, while

3 percent were spent in Minnesota. Wisconsin also attracted waterskiers, as 28 percent of vacations taken for that purpose were spent in that state, compared to Minnesota's 11 percent and Michigan's 22 percent. While 44 percent of those desiring to snowmobile vacationed in Wisconsin, Minnesota attracted only 17 percent of the total. And finally, 10 percent of all vacations designed for fun/pleasure/relaxation were spent in Wisconsin, while only 5 percent occurred in Minnesota.

Michigan was the leader among the three Lake states in attracting canoeing enthusiasts and represented 29 percent of those vacations. Minnesota was preferred to Wisconsin as a canoeing vacation site and accounted for 26 percent of the total trips.

Wisconsin led both Michigan and Minnesota as the selected site for holding conventions and/or conferences. Thirteen percent were held in Wisconsin, while each of the other two states accounted for only 6 percent.

REGIONAL TOURISM FOLLOWUP STUDY

The followup study of the multiscard survey was conducted to gather more detailed information that will be utilized in an indepth Minnesota tourism market analysis. As discussed in the Methodology section respondents to the multiscard sample were screened for two main characteristics to be included in the followup study. The traveller must have taken either a three day "weekend" trip of a "five or more days" trip. The vacationer must also have vacationed in Minnesota or one of the following states, all of which directly compete with Minnesota: Iowa, North Dakota, South Dakota, Wisconsin, Michigan or Canada and either of its provinces -- Manitoba or Ontario.

Nine hundred followup questionnaires were sent out. (A copy of the questionnaire can be found in Appendix B). Of the 900, 677 vacationers successfully completed and returned the questionnaire, for a response rate of 75%.

Characteristics of the Followup Sample

The respondents to the followup survey differ somewhat from those of the multiscard survey. The factor that accounts for this variance is the screening selection criteria discussed above. Most importantly, the researchers concentrated on trips taken to Minnesota and competing states, not all Midwestern travel.

The differences between the multiscard and followup survey samples appear in the following five major characteristics of the respondents:

- A larger number of the followup respondents (36.9 percent) were from the West North Central part of the midwest region than in the multiscard sample (29.6 percent). This difference is the result of emphasis being placed on this area in the followup analysis.
- Because there are fewer cities with populations of 500,000 to 2,000,000 in the West North Central region, more respondents in the followup survey come from Non SMSA areas, cities with fewer than 500,000 residents, and cities with over 2,000,000 people.

- More older people were surveyed in the followup study, which matches the finding from the multicard survey that Minnesota attracts an older tourist.
- The followup survey respondents have higher incomes than the multicard sample.
- Family sizes appear to be smaller among followup respondents, although not significantly different from the multicard survey.

Followup Sample's Vacation Behavior

The followup study sample can also be described very specifically in terms of their vacation behavior. This section will answer these questions about the group:

- Who went on the vacation?
- Where were nights spent on the vacation?
- How were destination states selected?
- What transportation was used to reach the destination state?
- How much was spent on the vacation?
- What activities were pursued?
- Will there ever be a return visit to the destination state?

Who Went on the Vacation?

Family Members. Of this sample, most vacations were taken by husbands and wives rather than by larger families. Wives were present on 89 percent of the trips, while husbands went along on 85 percent of the vacations. However, in only 44 percent of the total trips were children included. Other relatives were present on 17 percent of the trips, while friends accompanied families on 10 percent of the vacations.

Vacation Party Size. Consistent with the fact that more trips were taken by husbands and wives than by larger families is the finding that most trips (49%) were made by one or two individuals. The next largest segment of vacationers consisted of three and four member groups; they accounted for 32 percent of all trips. Only 18 percent of the vacations were taken by parties of five or more.

Where Were Nights Spent on the Vacation?

Number of Nights Spent in the Destination State. A large number of brief trips were reported by the 900 families, with two to three nights being the most popular length of stay in any destination state. Fifty-three percent of all trips lasted four nights or less. Another 20 percent of the trips were those in which tourists spent seven to ten nights in the destination state. In only 5 percent of the reported trips did stays within the destination state last two weeks or longer.

Nights Spent in States Other Than Destination. Most trips made by the 900 families (75%) were ones in which the destination was reached within a day. Families who spent one to two nights in states other than the destination state accounted for 14 percent of all trips; while in only 6 percent of the vacations, tourists stopped for three to four nights enroute to their destination.

Type of Lodging Stayed in During Vacation.

The most popular spot to spend a night was at the home of a friend or relative. In 41 percent of all vacations at least one night was spent in another's private residence. In one-third of the vacations, a night was spent in a motel, while hotels were resting places for those who accounted for only 9 percent of all trips. The next most frequented spot was a lodge or a resort, attracting those who represented 12 percent of all vacations. In 11 percent of the vacations, tourists stayed for at least a night in a campsite with a trailer or recreational vehicle.

Compared to the Multicard Sample

As reported by the 900 families, the multi-card sample's most popular length of stay in a destination state was for two to three nights. However, a larger percentage of trips by the multi-card sample lasted four nights or less (60%) than was represented by the 900 families (53%). Another 17 percent of the trips

were those in which tourists spent seven to ten nights in their destination states. A larger percentage of stays of two weeks or longer were reported by the 900 families, 5 percent, versus the multi-card sample's 3 percent.

How Were Destination States Selected?

Tour Groups. A very small percentage of all vacations taken by this sample were with a commercial tour group (4%).

Sources of Information About the Destination State.

Most trips made by the 900 families were ones in which the family had visited the state previously (62%) or had learned about the state from a friend or relative (32%). Information about a state was gained by writing away for it in only 10 percent of the cases, while only 9 percent of the trips were based on knowledge gained from advertising means. In only 1 percent of the trips was information acquired from a travel agency. As evidenced later in the Minnesota versus regional states comparison, it varies from whom tourists received information by state.

How Long Before the Trip is the Destination Selected?

From the study it appears that decisions to vacation during the winter months are more concentrated than decisions to take summer vacations. For example, decisions to travel during the Winter and Spring months, January through May, were made in eight or nine of the twelve months. Perhaps those who travel during the Winter months take time to enjoy the summer weather and avoid any winter vacation decision-making, since no decisions to vacation during February or March were reached in May, June or July. However, those vacationing from June through December seem to make their decisions in ten out of twelve months of the year. It is interesting to note that decisions to vacation in June were made in all twelve months.

Results show that those vacationing in January, February and March require more planning time than do Summer tourists. However, most decisions to travel during June and September were made the month prior to the trip.

A one to three month lead time was required for most Summer trips. Of those traveling in August, 62 percent of the decisions to do so were made in June, July and August, while 57 percent of the June and July trips were decided upon during each respective month and the two months prior to those.

Most decisions to travel, however, are made the same month as the trip is taken. The only exceptions were the months of February, June and September in which a greater number of decisions were made during the month prior to the trip than during the vacation month.

Experience With Destination State.

Forty-five percent of all vacations were by people who had visited the destination state more than five times previously. On the average, a state attracted many first-time visitors who accounted for 20 percent of the trips. Eighteen percent of the trips were taken by those who had been to the state one or two times before, while less than 4 percent had visited three, four or five times previously. This indicates that two-thirds of the trips were made by people who had visited the state numerous times before or who were newcomers to that state, and the regular visitors accounted for twice as many trips as did the first-time visitors.

Compared to the Multicard Sample.

The only common area within this section which can be compared to the multi-card sample is the distribution of travel by seasons. A somewhat larger percentage (52%) of annual trips by the multi-card sample occurred during the Summer, as compared to the 46 percent reported for the 900 families. The multi-card sample reported a similar number of trips occurring during the Fall (28%) as

did the other sample. However, while 13 percent of the trips by the sample of 900 were taken during the Winter, the multi-card sample reported only 6 percent. Spring travel was similar for both samples.

What Transportation Was Used to Reach the Destination State?

Eighty-three percent of all trips were made by those who traveled in private vehicles, either by car (77%) or by recreational vehicles (6%). Trips by airplane accounted for 13 percent of the total. The small percentage of trips made by bus, 4 percent, supports the finding that few traveled as part of a commercial tour group.

How Much Was Spent on the Vacation?

The majority of trips taken by the 900 families were inexpensive ones. In fact, 70 percent of all the vacations cost less than five hundred dollars, with 46 percent costing the tourists less than two hundred and one dollars. As the cost of the trip increased, fewer vacations were taken. For example, in only 1 percent of all trips did the tourists spend over two thousand dollars.

What Activities Were Pursued?

On 36 percent of the vacations, the people relaxed and did nothing. In general, more tourists participated in Sightseeing/Cultural Activities than Outdoor/Athletic Activities.

Among the Sightseeing/Cultural activities, "shopping" was listed by those accounting for 40 percent of all vacations. Another 35 percent of the vacations were spent visiting historic sites. Visiting national/state parks (27%) and museums (22%) were the next most popular activities within this category.

Among Outdoor/Athletic activities, swimming ranked number one, with tourists swimming on 27 percent of the trips. Twenty-three percent of the vacations included fishing and/or hiking as an activity, while boating was reported on 21 percent of the trips.

Only a small number of people traveled to Sporting Events. Within this category, baseball was listed most often but represented only 2 percent of all vacations.

Will There Ever Be a Return Visit To the Destination State?

On the average, 67 percent of the trips were taken by people who said they would definitely return to the destination state, while 18 percent of the vacations were taken by those who felt they would probably return. Four percent reported that they would probably not visit the state again, while only 1 percent said they definitely would not return. Another 9 percent of the trips were made by those who were undecided as to whether they would revisit the state.

Minnesota's Vacation Behavior

These same questions can be asked a second time, with answers more specifically directed to Minnesota. How does Minnesota compare with the other competing states? Where are its strengths? What weaknesses are really marketing opportunities to be capitalized upon? The answers to these questions will help Minnesota improve its approach to the tourism market.*

Who Went On The Vacation?

Family Members. Minnesota reflected the average for the number of husbands and wives that vacationed in the state (85% and 89% respectively). However, more vacations to Wisconsin and Michigan included children than did trips to Minnesota. Children were along on only 41 percent of Minnesota vacations, compared to 54 percent for Wisconsin and 53 percent for Michigan. A substantial number of visits to South Dakota included children (67%) which was much higher than the 52 percent average. These trips were probably made for the purpose of visiting scenic and historic sites, such as the Badlands or Mt. Rushmore.

Vacation Party Size. Parties of one or two individuals accounted for 48 percent of all Minnesota vacations, while the average percentage of all trips for which this group accounts was 40 percent. This finding is consistent with the fact that a small percentage of tourists bring children into the state. Iowa attracted even a larger percentage of groups of one and two members (51%). The percentages of Minnesota vacations to which parties of three or more contributed were below average (33% versus the average of 38%). South Dakota (47%) and Wisconsin (41%) reported above average numbers of trips taken by groups of three and four, while Wisconsin (24%) and Michigan (23%) were above the regional average (22%) in attracting parties of five or more. This is consistent with the fact that more children are present on trips to Wisconsin and Michigan (than to Minnesota) and account for larger groups of tourists.

* Throughout this section, the average referred to is the average of the competing states, excluding Minnesota.

Where Were Nights Spent On the Vacation?

Number of Nights Spent in the Destination State. Minnesota and Wisconsin were popular short-trip states, as they reported that 50 percent of all trips to their respective states lasted three nights or less. Michigan and South Dakota each reported 40 percent, well below the average of 48 percent.

The percentage of trips lasting seven days or more were above the average of 23 percent in Minnesota, Wisconsin and Michigan, where all states reported 24 percent.

South Dakota and Manitoba/Ontario were substantially above average and reported that 38 percent and 39 percent of vacations to those respective areas lasted one week or longer. This is probably attributed to the fact that tourists traveled further to reach their destinations and spent more time in doing so.

Nights Spent in States Other Than Destination. Of all trips in which Minnesota was the destination state, 88 percent of the vacation nights were spent within the state. That means that only 12 percent of the vacation nights were spent elsewhere, compared to an average of 15 percent for all states. Wisconsin and Michigan each retained a higher percentage of their vacation nights, as 90 percent and 93 percent of vacation nights were spent in each of the respective states. Only 60 percent of the nights were spent in South Dakota by those who selected that state as their destination, meaning that 40 percent of those vacation nights were spent elsewhere. Nights away is a very important measure of tourist spending, because it is a proxy for dollars spent on a trip.

The average stop along the way for Minnesota-bound tourists is 2.6 days, slightly higher than Michigan and Wisconsin figures, but still below the regional average of 2.7 days. Those who stop en route to South Dakota and North Dakota spend an average of 3 and 3.6 days on the road.

Type of Lodging Stayed in During Vacation

In 39 percent of the trips to Minnesota at least one night was spent in the home of a friend or relative. This is slightly below the average of 40 percent. Motels got 24 percent of Minnesota trade, while hotels picked up only 4 percent. Michigan and Wisconsin figures were fairly consistent with these. The number of Minnesota trips in which at least one night was spent in a lodge or resort (19%) or at a campsite with a trailer or recreational vehicle (13%) were above average, (13% and 12%, respectively).

Wisconsin and Minnesota each respectively accounted for 26 percent and 23 percent of the trips spent in lodges or resorts, while Michigan contributed only 9 percent to that total. However, those staying at campsites with tents preferred Michigan to both Minnesota and Wisconsin, as 16 percent of those stops were in Michigan, 13 percent in Minnesota and 12 percent in Wisconsin. Minnesota did lead the other two states in the number of nights spent at a campsite with a trailer or recreational vehicle.

States as "Pass Throughs" for Other States.

The regional figure of 92% of total vacation nights being spent in the destination state indicates that no state is just a pass through state and that people proceed rather directly to their destination. Minnesota's percentage of 91.7% of total nights is consistent with the region.

How Were Destination States Selected?

Tour Groups. Less than 1 percent of Minnesota trips were taken with commercial tour groups. There seems to be no reason why Minnesota should be inaccessible for tour groups. The rest of the region attracts very few tour groups also (1%). However, it is significant that 9 percent of trips taken to states outside the region were part of commercial tours. This means that a fair percentage have at least shown interest in traveling with such a group.

Perhaps this is one area of Minnesota tourism which can be expanded. Chicago residents, for example, may make more trips to Minnesota if the economy and convenience of a tour were stressed. This might offset Chicagoans' visits to the state of Wisconsin which is probably due to that state's proximity. The larger metropolitan areas of Ohio and Michigan could be tapped this way as well, along with the residents of Kansas City and St. Louis.

Charter airplane tours could make weekend visits highly feasible. The North Shore of Lake Superior is one attractive area which is perhaps underexploited due to its remoteness. With fishing, hunting and skiing available for tourists, along with the economy of cross country skiing, tourists have four reasons to vacation there. In addition, it is easily accessible from the Duluth airport.

The commercial tour business is well-structured and tangible to approach. A vigorous promotional effort with travel agencies should be relatively simple and inexpensive to conduct. The key to success will be having the proper tourist facilities to ensure satisfaction by the tour members.

Sources of Information About the Destination State

Information for 67 percent of the trips to Minnesota was based upon previous visits and another 28 percent of the trips were influenced by information gathered from friends or relatives. These percentages are extremely close to those reflected by Wisconsin and Michigan and all other regional states. Only 6 percent of this state's vacations were the result of knowledge gained from writing away for information. Yet in a neighboring state it is significant that 20 percent of the trips to South Dakota were a result of information gathered in this manner. In addition, South Dakota was above average in the categories of advertising sources, news articles, AAA or other Motor Clubs. Thirteen percent of the vacations to South Dakota were based on information learned from advertising, a figure significantly higher than Minnesota's 6 percent. Besides the two above-mentioned categories

where Minnesota promotional activity appears to be weak, very few trips to Minnesota were based on information gained from News Articles or from the AAA or Other Motor Clubs. Perhaps attention should be focused on these areas to make more people aware of what Minnesota has to offer its vacationers.

Another weak area in the Midwest tourism business is the travel agency. No vacations to Minnesota were the result of information supplied by a travel agent while in states outside the region, 3% were the result of information obtained through a travel agent. Possibly this source could be made a more integral part of attracting tourists to Minnesota.

How Long Before the Trip is the Destination Selected?

Thirty-two percent of all decisions to visit Minnesota were made during the months of June, July and August. This is slightly below the average of 33 percent, a figure represented by the state of Michigan. Wisconsin, like Minnesota, is above average and reported a figure of 32 percent of all decisions to visit that state were made during the summer months. Since the majority of visits to those states are made during the Summer, the figures show that decisions are reached shortly before departing on the vacation. Another 9 percent of the decisions to visit Minnesota are made in each of the months of April and May. Decisions to visit Minnesota were made throughout the year. Fewer decisions were made in late Fall and Winter with most made in June and July (24%). Each month reported at least 3.6% decisions were made at that time.

Experience With Destination State

Of all trips made to Minnesota, 66 percent were made by people who had been to the state five or more times before, a figure well above the average for the other regional states (53%). Fifty-one percent and 58 percent of vacations to Michigan and Wisconsin, respectively, were made by people who had vacationed there at least five times before. South Dakota represented a small percentage of those frequent returnees (36%).

Minnesota is below average in attracting newcomers to the state. Only 7 percent of trips to this state were taken by people coming here for the first time. Wisconsin and Michigan showed figures somewhat higher than Minnesota's and reported 12 percent and 13 percent, respectively. Although not as many trips to South Dakota were made by return visitors, 27 percent of vacations to that state were made by newcomers, above the average of 16 percent.

The fact that Minnesota does not attract many newcomers is further evidence that Minnesota's promotional efforts are weak. However, visitors to Minnesota make numerous return visits to this state, and Minnesota boasts a higher percentage of people who visit five or more times than any other state in the region except for North Dakota. However, Minnesota is below average in attracting those that have vacationed here one to five times previously. This indicates that if tourists can be lured into Minnesota, the likelihood is that they will enjoy their visit to the state and will probably return for another vacation in Minnesota. Minnesota must turn its attention toward this segment and lure them into the state, while at the same time keeping its return visitors pleased with Minnesota's offerings.

What Transportation Was Used To Reach the Destination State?

Mode of Travel. Ninety-four percent of Minnesota trips were taken in some form of private vehicle, the two most popular being automobiles (83%) and recreational vehicles (11%). Those results are consistent with other states in the region, although Minnesota's recreational vehicle percentage exceeds the average of 7 percent. These figures may be greatly affected by the present gas shortage, since so much travel to and within Minnesota is by private vehicle.

Only Minnesota (4%) and South Dakota (5%) show above average airplane usage (the average is 3%).

Route of Travel. Forty-one percent of all Minnesota trips were made by residents of this state. The greatest number of nonresidents to vacation in Minnesota were Iowans (13%), followed by Wisconsin residents who accounted for 12 percent of Minnesota vacations. Thus, in 66 percent of the trips made to Minnesota, vacationers passed through no other states.

Illinois residents, who accounted for 11 percent of this state's vacations, would have passed through either Wisconsin or Iowa to reach their destination. Although together they made up only 9 percent of all Minnesota trips, 11 percent of trips by Indiana residents were to Minnesota and 20 percent of the trips by Nebraska residents were to this state. Tourists from Indiana had to pass through Illinois and either Wisconsin or Iowa, whereas the Nebraska resident traveled through either South Dakota or Iowa to reach Minnesota.

How Much Was Spent On the Vacation?

Fifty-seven percent of the vacations to Minnesota cost less than two-hundred and one dollars. That figure should be compared to the average of 58 percent. Like Minnesota, Michigan was slightly below average and reported 54 percent. Wisconsin, however, reported that 63 percent of all vacations to that state cost less than two-hundred and one dollars.

The least expensive states to travel in were Iowa, North Dakota and Wisconsin. These three states were above average in representing the number of vacations that cost less than 500 dollars. Minnesota reflected the average of 81 percent.

The most expensive states were South Dakota and Manitoba/Ontario, which can be attributed to the distance one must travel to reach those destinations, which results in more nights spent en route.

What Activities Were Pursued?

Minnesota was above average in attracting visitors who vacationed for the following reasons: Boating, Camping, Fishing, Hiking. Of these four categories, Minnesota was ahead of both Michigan and Wisconsin in accounting for those

vacations taken for the purpose of fishing. Michigan was preferred to Minnesota and Wisconsin for boating, camping, and hiking. The three Lake states were above average in all of these categories, except Wisconsin reported a below average figure for those vacations designed for camping.

Both Wisconsin and Michigan were above average in reporting the number of visits to those states by tourists who swim, while Minnesota reported a below average figure. Again, Minnesota lagged behind Michigan and Wisconsin in representing the number of vacations spent in this state by those who relaxed and did nothing.

While vacations designed for the purpose of visiting historic sites and museums were below average in each of the Lake states, South Dakota's figures were well above average in these categories. Both South Dakota and Michigan reported above average figures for those vacationing in National and State Parks, while Wisconsin and Minnesota were below average.

Although a smaller percentage of vacations were taken for the purposes of canoeing, waterskiing and visiting family and friends, Minnesota was still above average in attracting these tourists.

Will There Ever Be a Return Visit To the Destination State?

85% of those trips to Minnesota were by those who had been here before. The average is 50%, while Michigan and Wisconsin reported 29% and 38%, respectively. Consistent with those results is the fact that Minnesota is far below average in attracting new tourists. While the average is 44%, only 9% of trips to Minnesota were by newcomers. 70% of Michigan's trips and 53% of Wisconsin vacations were by new tourists. 66% of Minnesota vacations were by tourists who had been to this state more than five times prior to January 1, 1978.

Seventy-seven percent of the trips to Minnesota were by tourists who said they would definitely return, while the average was 67%. Satisfaction

was also evidenced by figures of 75% and 71% in Wisconsin and Michigan respectively

Those visiting Minnesota had more definite opinions as to whether they would return, probably due to the large number of return tourists. For example, only 3% were unsure, while 7% of Michigan's and 9% of Wisconsin's were unsure whether they would return to those states. The average was 9%.

The only reason listed for not returning to Minnesota was because family/friends no longer live there.

Reasons why Minnesota is an acceptable destination state:

30%	--	Scenic/beautiful
22%	--	Fishing
22%	--	Lakes
19%	--	Friends/Relatives

APPENDIX A

TOURISM BIBLIOGRAPHY

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School of Business Administration U of M
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Sources of Data: (Mkt. Analysis)
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 - b. Mail survey of national panel families (Nat'l. Farm Opinion)
 - c. Telephone and personal interviews of Twin Citians
 - d. Mail inquiries of individuals responding with coupons
Location: Minnesota

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Northstar Research and Development Institute
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Minneapolis, MN (Oct. 1966)

Sources of Data:
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Touche Ross and Co. New York, NY

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Location: New York

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American Automobile Association (March, 1977)
AAA, Falls Church, VA
Benson and Benson, Inc. Princeton, NJ

Sources of Data:
 - a. Nationwide survey of master members
Location: Nationwide

- (5) AAA Members' Opinion on Issues of Importance, Automobiles, Driving
and Travel Habits

Source of Data:
 - a. #4 Summary
Location: Nationwide

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William Rudelius, Allan Pennington, Ivan Ross
UM Graduate School of Business Administration
Minneapolis, MN (Fall, 1971)

Sources of Data:

Gives: Method of data collection (5 means)

Common data sought (7)

- a. MW Mail sample
- b. TC Interviews
- c. Coupon Mailers Survey
- d. Secondary sources

Location: Midwest

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Hal Giesecking The Travel Advisor
Bronxville, NY (1977)

Sources of Data:

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Location: National

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Research Division, MN Department of Economic Development
St. Paul, MN (Jan., 1977)

Sources of Data:

(Comparison of MN 1975 and 1976 winter seasons)

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Bureau of Economic Research, U of M. Duluth, etc. (TABLES)

Location: MN

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Minnesota Research Bulletin #04
Department of Economic Development 1976

Sources of Data:

- a. Secondary: MN Dept. of Revenue, Tax Research Div.
travel indicators
US Travel Data Center
Summary of trends by month, area, topic

Location: MN

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State of Minnesota, Department of Economic Development
St. Paul, MN (April, 1975)
- Sources of Data:
a. Secondary
- Location: MN
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Department of Economic Development
St. Paul, MN (1973)
- Sources of Data:
a. Secondary
- Location: MN
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Research Division, MN Department of Economic Development,
St. Paul, MN (1972)
- Sources of Data:
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- Location: MN
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- Location: MN
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Minnesota Research Bulletin #36
Department of Economic Development, St. Paul, MN (1976)
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Canadian Government, Office of Tourism
Traveldata Limited of Toronto, Toronto, Ontario (1977)

Sources of Data: (Mkt Analysis)

- A. Personal interview - Cross section of Canadians

Location: Does have Great Lakes Region

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Canadian Government, Office of Tourism
Traveldata Limited of Toronto, Toronto, Ontario (1976)

Sources of Data: (MKT Analysis)

- a. Questionnaire of Canadians
Used "Canadian Facts"

Location: Does have Great Lakes section

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Canadian Government, Office of Tourism
Marketing Research Office, Research and Planning Division (April, 1978)
Traveldata Limited of Toronto, Toronto, Ontario

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Location: Does have Great Lakes section

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Minnesota Research Bulletin #31
Department of Economic Development
St. Paul, MN (July, 1977)

Sources of Data:

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Location: MN

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Counties and Cities
MN Research Bulletin (MNRB) #38
Department of Economic Development (DED)

Sources of Data:

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Location: MN

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MNRB #30
DED

Source of Data:

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Location: MN

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Regions, Counties and Cities
MNRB #23
DED 1977

Sources of Data:

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Location: MN

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DED Research Division 1/78
St. Paul, MN

Sources of Data:

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Location: MN

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MNRB #43
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Sources of Data:

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Location: MN

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Location: MN

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Department of Economic Development, Tourism Division,
Midcontinent Surveys; Mpls., MN (Oct., 1972)

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Location: MN

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Gallup International, Inc. Princeton, NJ

Sources of Data:

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Location: Does have MN information

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Department of Commerce and Economic Development, Olympia, WA (1972)

Source of Data:

- a. Secondary

Location: Washington

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Office of Tourism, Illinois Department of Business and Economic
Development 1976

Source of Data:

a. Secondary

Location: Illinois

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Travel Development Division, Resource and Support Division
Iowa Development Commission
Des Moines, IA (1977)

Source of Data:

a. Survey of information center guests

Location: Iowa, some MN information

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1972 Census of Transportation
Table 33. Travel to and through Texas: Summer 1972
Table 56

Source of Data:

a. Secondary

Location: Texas

The following (37-44) were prepared by:

Resource and Support Division
Travel Development Division
Iowa Development Commission
Des Moines, IA

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August 17-27, 1978

Source of Data:

a. Survey

Location: Iowa

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September 23 and 24, 1978

Source of Data:

a. Survey

Location: Iowa

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Source of Data:

a. Survey

Location: Iowa

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May 28-30, 1977 upon Cherokee and the State of Iowa

Source of Data:

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Location: Iowa

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Source of Data:

a. Survey

Location: Iowa

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Source of Data:

a. Survey

Location: Iowa

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Source of Data:

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Location: Iowa

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Location: Iowa

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Source of Data: (MKT analysis)

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Location: Indiana

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Location: Finland/Foreign Travel

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Source of Data:

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Decisions for Hawaii and South Carolina
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University of South Carolina, Columbia, South Carolina

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Arch G. Woodside and David M. Reid
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Source of Data:

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Location: National

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M. E. Bond, Bill McDonald
Arizona Business (June/July, 1978)
Bureau of Business and Economic Research
College of Business Administration
Arizona State University

Source of Data:

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b. Projection on basis of model

Location: Arizona

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Bureau of Business and Economic Research
College of Business Administration
Arizona State University (July, 1976)
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Source of Data:

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Location: Arizona

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(Third Calendar Quarter, 1978)
Prepared for Arizona Office of Tourism
Prepared by: Bureau of Business and Economic Research
CBA, ASU, Tempe, Arizona Nov. 1978

Source of Data:

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Location: Arizona

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Division of Travel and Tourism
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Raleigh, North Carolina

Source of Data:

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Location: North Carolina

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Lewis and Leona Copeland
University of Tennessee Station (Jan., 1978), Knoxville, TN
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Source of Data:

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Location: Tennessee

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Travel Research Study #17 Polly W. Hein
Division of Services, College of Business Administration
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Source of Data:

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Location: Georgia

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CBA University of Georgia, Athens

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Source of Data:

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Location: Georgia

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Reno/Sparks, Nevada Vol. 5 No. 1

Source of Data:

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Location: Reno, Nevada

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Dept. of Resource Development
State of Wisconsin 1966

Sources of Data:

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Location: Wisconsin

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Accommodations"

(Same data as above)

Sources of Data:

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Sources of Data: Surveys

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Department of Commerce, State of New York
Wells, Rich, Greene, Inc.)
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Sources of Data:

Location: New York

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Source of Data: Survey of those leaving by plane or auto

Location: California
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Garey C. Durden and Jonathan Silberman
Economics Department
Old Dominion University, Norfolk, VA (Sept., 1974)

Source of Data: Math. Statement: # visitors, per capita, income,
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Location: Florida
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Business Research Division
University of Colorado
in cooperation with the Travel Research Association.

Source of Data: Secondary

Location: National
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Articles
Business Research Division
University of Colorado
in cooperation with the Travel Research Association

Source of Data: Secondary

Location: National
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Prepared for Better Homes and Gardens
Prepared by BASICO Behavior Science Corporation, Des Moines, IA

Source of Data: 600 in-depth interviews, adult, mem. of family,
\$10,000
Boston, Chicago, New York

(72) Gallup Domestic Vacation Travel Index 1966

Sources of Data: Interviews 1600 completed

Results:	(1)	Calif.	67	
	(2)	Florida	59	
	(3)	Hawaii	58	State most like to visit/revisit
	(4)	New York	48	
	(22)	MN	21	

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4th Quarter Report

United States Travel Data Center

Washington, DC

Sources of Data: Sample Size 2700 households

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Department of Business Development

Bozell and Jacobs, Inc.

Milwaukee, Wisc. (Oct., 1978)

Sources of Data:

Location: Wisconsin

APPENDIX B

EXAMPLE

In December, 1978, you and your spouse spent three days, two nights skiing in Wisconsin.

Last July, the family drove to Maine in New England for ten days, nine nights to visit relatives and see the historic sights on the way.

Last March, you both travelled to New York City to shop and enjoy the night life.

In January, 1978, you and your spouse flew to Florida for sunshine and a tennis camp for four days and nights.

Members of your family took more than four vacations during this period, please list those in which longest time was spent away from home.

SAMPLE VACATION SUMMARY CHART: JANUARY 1, 1978 to DECEMBER 31, 1978

Vacation	Month and Year	Main Destination State(s)	Total Number Nights Away	MAIN PURPOSE(S) OF VACATION					
				Visit Family Or Friends	Outdoor Activities		Sightseeing		OTHER Write in:
					Summer Season	Winter Season	Metro	Non-Metro	
1st Recent	<u>Dec. 78</u>	<u>Wisc.</u>	<u>2</u>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
2nd Recent	<u>July 78</u>	<u>Maine</u>	<u>9</u>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	_____
3rd Recent	<u>March 78</u>	<u>N. Y.</u>	<u>3</u>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>Shop/Play</u>
4th Recent	<u>Jan. 78</u>	<u>Florida</u>	<u>4</u>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<u>Tennis Camp</u>

YOUR FAMILY'S VACATION SUMMARY CHART: JANUARY 1, 1978 through DECEMBER 31, 1978

Vacation	Month and Year	Main Destination State(s)	Total Number Nights Away	MAIN PURPOSE(S) OF VACATION					
				Visit Family Or Friends	Outdoor Activities		Sightseeing		OTHER Write in:
					Summer Season	Winter Season	Metro	Non-Metro	
1st Recent	_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
2nd Recent	_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
3rd Recent	_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
4th Recent	_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____

What you've listed the vacations which you and other members of your family took between January 1, 1978 and December 31, 1978, I'd like you to give me (on the following three pages) detailed information about each of these vacations.

Some of the answers to some of these questions depend upon the attitudes or information of other members of your family, please talk with those other family members before answering. Your opinions may differ from yours. Thank you.

Each column on these two pages is headed by a number. These numbers refer to the vacations you listed as MOST RECENT, 2nd MOST RECENT, 3rd MOST RECENT and 4th MOST RECENT on the preceding page - in your VACATION SUMMARY CHART. Remember, if you took more than four vacations list the four in which the longest time was spent away.

Starting with Vacation #1 (your MOST RECENT), please go down the column for that vacation, and check the proper boxes to show the correct answers for your family. Answer all of the questions on BOTH pages for VACATION #1 - before coming back and describing VACATION #2 (your 2nd MOST RECENT). Continue in this way until you have described each vacation you listed in your VACATION SUMMARY CHART.

	1 MOST RECENT VACATION #1	2 2nd MOST RECENT VACATION #2	3 3rd MOST RECENT VACATION #3	4 4th MOST RECENT VACATION #4
1. Please write in the MONTH of each vacation taken in 1978 ..	_____	_____	_____	_____
2. a) Who went on this vacation? (CHECK AS MANY AS APPLY)				
Husband	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wife	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Children	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other relative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Friends	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (Write in):	_____	_____	_____	_____
b) What was the total number of people in your immediate party for this vacation? (i.e., those for whom you paid some or all expenses.)	# _____	# _____	# _____	# _____
3. a) How many nights were spent in the vacation <u>DESTINATION</u> state? Nights Spent (Write in):	# _____	# _____	# _____	# _____
b) How many nights were spent in states <u>other than</u> your main destination state(s)?	# _____	# _____	# _____	# _____
c) Please indicate (1) in what states these nights were spent; AND (2) how many nights were spent in each state?	State/# of Nights ____/____ ____/____ ____/____ ____/____ ____/____	State/# of Nights ____/____ ____/____ ____/____ ____/____ ____/____	State/# of Nights ____/____ ____/____ ____/____ ____/____ ____/____	State/# of Nights ____/____ ____/____ ____/____ ____/____ ____/____
4. Was this trip part of a commercially organized tour group? YES NO	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
5. In what types of places were one or more nights spent on each vacation? (CHECK ALL THAT APPLY)				
Home of friend or relative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Motel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hotel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lodge or resort	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campsite with tent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campsite with trailer or recreational vehicle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (Write in):	_____	_____	_____	_____

	1	2	3	4
	MOST RECENT	2nd MOST RECENT	3rd MOST RECENT	4th MOST RECENT
	VACATION #1	VACATION #2	VACATION #3	VACATION #4
6. Where was information about where to go or what to do obtained for this vacation? (CHECK ALL THAT APPLY)				
Had been there before	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advice from friend or relative ..	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wrote to request information ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advertising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
News Articles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AAA or other motor club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (Write in):				
7. In which month was the decision made on which state(s) to vacation in?				
8. How many times before this vacation had your family, or family members, vacationed in this MAIN DESTINATION STATE(S)?				
NONE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Once before	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Twice before	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 to 5 times before	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More than 5 times before	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. What mode(s) of transportation were used in making this vacation trip? (CHECK ALL THAT APPLY)				
Airplane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Automobile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recreational Vehicle ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (Write in):				
10. What was the total cost of each vacation? (Including lodging, meals, transportation, entertainment, souvenirs, and other expenses of the vacation.)	\$ _____	\$ _____	\$ _____	\$ _____
11. a) Do you think that your family (or whoever went on this vacation) will ever go back to this MAIN DESTINATION STATE for a vacation?				
Definitely YES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Probably YES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not Sure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Probably NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Definitely NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) If you answered "Definitely YES" or "Definitely NO" for this vacation, please briefly explain in the space below.				
VACATION #1 (MOST RECENT)				
VACATION #2 (2nd MOST RECENT)				
VACATION #3 (3rd MOST RECENT)				
VACATION #4 (4th MOST RECENT)				
12. a) What is the likelihood that the vacations you have described above could have been taken in MINNESOTA?				
	VERY LIKELY	SOMEWHAT LIKELY	DON'T KNOW	SOMEWHAT UNLIKELY
	VERY UNLIKELY			
VACATION #1 (MOST RECENT)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
VACATION #2 (2nd MOST RECENT)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
VACATION #3 (3rd MOST RECENT)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
VACATION #4 (4th MOST RECENT)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. b) If you answered "Very Likely" or "Very Unlikely" for any of these vacations, please briefly explain why or why not each of these vacations could have been taken in MINNESOTA.

VACATION #1 (MOST RECENT) _____
 VACATION #2 (2nd MOST RECENT) _____
 VACATION #3 (3rd MOST RECENT) _____
 VACATION #4 (4th MOST RECENT) _____

13. Other than during the vacation period from January 1, 1978 through December 31, 1978, have you or any members of your family ever vacationed in MINNESOTA?

☐ YES

☐ NO

14. a) Do you or members of your family consider MINNESOTA as an acceptable destination state for vacation travel?

☐ YES - Answer "b"

☐ NO - Answer "c"

b) If "YES", why is this the case? _____

c) If "NO", why not? _____

15. The final question is about your vacation activities. What did you do on each vacation? (CHECK ALL ACTIVITIES THAT APPLY)

	1 MOST RECENT VACATION #1	2 2nd MOST RECENT VACATION #2	3 3rd MOST RECENT VACATION #3	4 4th MOST RECENT VACATION #4
<u>OUTDOOR/ATHLETIC ACTIVITIES</u>				
Backpacking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Biking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Boating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Camping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canoeing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cross-Country Skiing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Downhill Skiing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fishing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Golfing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hiking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hunting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Snowmobiling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Swimming	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tennis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Water Skiing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (Write in): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>SIGHTSEEING/CULTURAL</u>				
Concerts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dance/Opera	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Festivals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fall Colors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Historic Sites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Movies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Museums	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National/State Parks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State Fairs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Theatre/Plays	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Zoos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (Write in): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>SPORTING EVENTS</u>				
Football Game	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Baseball Game	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Soccer Game	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hockey Game	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Basketball Game	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (Write in): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>RELAXED AND DID NOTHING</u>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

READ THIS SIDE FIRST

During the year from Dec. 1, 1977, through Nov. 30, 1978, did you or any member of your household take a vacation - that is a trip taken MAINLY for RECREATIONAL PURPOSES where you were away from home at least OVERNIGHT. Business trips don't count. I'm interested in only the state(s) that was your main destination, and the principal reason(s) why you went. EXAMPLE: A. Last January, you and your husband spent 3 days skiing in Wisconsin. B. In March, you both traveled to New York City to shop and enjoy the night life. C. Last July, the family drove to Pennsylvania for 10 days to visit relatives and see historic battlefields. (I HAVE COMPLETED THE FORM BELOW FOR YOU TO USE AS A GUIDE.)

MONTH AND YEAR	DESTI- NATION STATE	# DAYS AWAY	VISIT FAMILY/ FRIENDS	MAIN PURPOSE(S) OF VACATION				OTHER (WRITE IN)
				SUMMER SEASON	WINTER SEASON	METRO	NON- METRO	
^A 1/78	Wisc.	3	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
^B 3/78	N.Y.	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Shop/Play
^C 7/78	Penn.	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

CONTINUE →

1. During the year from Dec. 1, 1977, through Nov. 30, 1978, did you or any member of your household take a vacation? ☐ YES ☒ NO - RETURN CARD
2. If "YES", list as many vacation trips as possible following the directions from the other side of this card. (If there isn't enough space to list all vacations, list those where the most time was spent away from home.)

MONTH AND YEAR	DESTI- NATION STATE	# DAYS AWAY	VISIT FAMILY/ FRIENDS	MAIN PURPOSE(S) OF VACATION				OTHER (WRITE IN)
				SUMMER SEASON	WINTER SEASON	METRO	NON- METRO	
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

READ OTHER SIDE FIRST