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MRI REPORT

ASSESSMENT OF THE TOURISM DEVELOPMENT COMPONENTS OF THE IRON RANGE INTERPRETATIVE PROGRAM

FINAL REPORT

MRI Project No. 4939-N

July 1980

For

IRON RANGE RESOURCES AND REHABILITATION BOARD

Highway 53 South

P.O. Box 678

Eveleth, Minnesota 55734

Consultant Report to IRRRB by Midwest
Research Institute/North Star Lab.-
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OF THE IRON RANGE INTERPRETATIVE PROGRAM

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Center for Economic Studies
MIDWEST RESEARCH INSTITUTE

F I N A L R E P O R T

4939-N

ASSESSMENT OF THE TOURISM DEVELOPMENT COMPONENTS
OF THE IRON RANGE INTERPRETATIVE PROGRAM

EXECUTIVE SUMMARY

Development and Current Status of the
Iron Range Interpretative Program

- The Iron Range Interpretative Program represents a public investment since 1970 of nearly \$7.9 million in the planning, development and/or construction of the Iron Range Interpretative Center complex and a network of 12 affiliated and 8 cooperating historical sites and facilities. Nearly \$6.0 million of this total went exclusively for the development and construction of the Iron Range Interpretative Center.
- While built to accommodate 225,000 tourists a year, the Interpretative Center in its third year of operations has shown declining attendance with annual totals in the range of 70,000 to 80,000 visitors (excluding visitors to the one week Ethnic Days festival).
- Of the nearly \$1 million spent on affiliated sites, more than a third has gone towards construction of the Vermilion Range Cultural Interpretative Center in Ely and a quarter for the construction and start-up of the Croft Mine Park in Crosby. Construction of two new observation stands replacing temporary stands at the Rouchleau Mine in Virginia and the Hull-Rust Mine in Hibbing account for an additional \$220,000 of the total. While all of these major sites are open or scheduled to open this year, it is unlikely that any of these new sites will stimulate any increased support for the main Interpretative Center. Because these facilities offer essentially parallel attractions, it is likely that the new sites may well have the effect of siphoning off potential visitors to the Center or at least reducing the likelihood that visitors will return to it with any frequency.

Market Size and Vacationer Characteristics

- Northeast Minnesota (including the Arrowhead and Heartland Tourism Regions) is the major destination for nearly half of the 6.7 million annual overnight vacationers to Minnesota. This means that about one million trips are taken by 670,000 Midwest families and households each year into this Northeast Region. Total overnight trip expenditures in 1979 totalled nearly \$250 million.
- Vacationers to Northeast Minnesota are, by and large, younger than other visitors to the state. They are also wealthier and travel in larger groups (typically more than three family or household members). The Northeast Region, to date, has been proportionately less successful than other regions of the state in attracting seniors and retired persons.
- More than half of the vacationing parties (55.6 percent) to the Northeast Region of the state are Minnesota residents. Other Midwestern states important to Northeast Minnesota tourism are: Illinois (11.2 percent), Wisconsin (7.5 percent) and Iowa (6.9 percent).
- Also significant is the finding that 43.8 percent of the vacationing parties to Northeast Minnesota in 1979 came from major urban centers with populations in excess of two million people. Given the states of residence, this would indicate that roughly a third of the vacationers to the Northeast Region were from the Twin Cities area and another five to ten percent were from the Chicago area. An estimated ten percent of vacationers to the Northeast were residents of the Duluth area. This information suggests a major opportunity to concentrate tourism promotion within these major urban markets.
- Most vacationers (70 percent) come to Northeast Minnesota, at least in part, to pursue summer outdoor activities. Eighty percent travel by car and most (60 percent) vacation for less than a week in the Region. Parties vacationing in Northeast Minnesota in 1979 spent an average of \$234 while on vacation.
- Camping, cabins and resorts account for over half of the lodging used by vacationers to the Northeast Region. The limited number of available Iron Range accommodations--particularly camping sites--works against IRRRB plans to develop tourism on the Range.
- Most vacation destination plans are based on previous vacation experience and the advice of friends and relatives. Only 20 percent of the vacationers to Northeast Minnesota base their destination plans on printed information, advertising or other information sources. This puts the IRRRB and the Iron Range at a major disadvantage compared with other established areas in developing a new base of tourism.

- Nearly two-thirds of the vacation trips to Northeast Minnesota take place in the prime summer months, June through August. Only 20 percent of the vacation trips to the Region occur during the fall months. By stretching the Iron Range tourist season into the fall, the IRRRB could conceivably attract a large new segment of the tourism market, i.e., working older couples, young working couples without children and retired people.

Factors Limiting Tourism Development on the Iron Range

- The IRRRB through its Iron Range Interpretative Program has overemphasized the potential for attracting motorists passing through the area bound for recreational areas such as Voyageurs National Park and the Boundary Waters Canoe Area.
 - * Because of shorter vacation trips (most less than one week), energy costs and lower speed limits, most vacationers have little time for side trips on their way to a destination spot.
 - * Most vacationers bound for the BWCA are not likely to be sufficiently attracted to the more passive, indoor attractions characteristic of the Iron Range Interpretative Program.
 - * No real economic benefits are derived from visitors to the Range unless they can be convinced to stay a day or two in the area and to spend money for food, lodging and other commercial needs.
- Limitations to the capacity and availability of Iron Range tourism support services is a major factor limiting growth of the core range area as a vacation destination spot. Campsites are badly needed particularly in the Hibbing-Virginia area. The support service problem is a classic "chicken and egg" situation. Without adequate support services, tourism cannot develop. Without development of a tourism base these support services may not be economically justifiable. The problem requires the attention and coordination of the IRRRB.
- Many of the individuals on the Range interviewed during the course of the study expressed skepticism about tourism development on the Range. They were concerned about the lack of lakes, and the lack of tourist accommodations. The lack of strong, vocal community support for tourism on the Iron Range may well be

the most difficult of all problems to overcome. The IRRRB should nurture a sense of community ownership in the tourism programs supported by IRRRB funds and expand the role of communities in planning and promoting tourism on the Range.

- Tourism promotion by Iron Range agencies and attractions has lacked the coordination and focus needed to establish the Range as a vacation destination area. The IRRRB has not taken a leadership role in pooling and coordinating these regional promotion efforts.

Strategies for Improving Iron Range Tourism Development

- To achieve the desired goal of establishing the Iron Range as a vacation destination area, the IRRRB should concentrate its tourism development activities within a 50 mile region incorporating the Hibbing, Virginia and Hoyt Lakes areas. The vacationer must perceive the Range as a discrete area with identifiable boundaries, not too large to require excessive driving or shifts in lodging and not too small to give the impression of having limited attractions and support amenities.
- The establishment of a regional tourism advisory committee is a necessary first step in cementing the concept of regional tourism development. The committee of 8 to 10 members should be given the responsibility of overseeing the planning and development of a regional tourism program and should be organized to help leverage community and private sector support, participation and investment.
- The IRRRB, building off last year's Ethnic Week program, should plan and support development of a major annual Iron Range festival or event running over five or six consecutive summer weekends. The event must have a regional flavor. It should be at a neutral location, not affiliated with any other community site or program but should be compatible with the other tourism attractions in the Hibbing, Virginia, Hoyt Lakes region.
- The IRRRB should establish a new emphasis on supporting private tourism and commercial development efforts within the Hibbing, Virginia, Hoyt Lakes area. It should investigate the use of such development tools as: 1) revolving development funds, 2) lease-purchase arrangements, 3) land banking, and 4) commercial reinvestment programs.
- Emphasis should be given to improving the efficiency and effectiveness of the Iron Range Interpretative Center program.

Attention should be given to minimizing operational costs, improving the productivity of facility floor space, and establishing a program of changing exhibits at the Center. The IRRRB should begin an on-going monitoring program to aid in planning and development at the Center and should avoid further facility development unless shown to be economically self-supporting.

- To hold down operating cost burdens associated with proposed Interpretative Program development, the IRRRB should establish a uniform set of funding criteria that will give emphasis to financing economically self-supporting projects. Proposed projects should be studied for feasibility, and revenue-cost estimates should be projected over a five-year period.
- Along with a coordinated program and facility development effort, the key to development of the Hibbing, Virginia, Hoyt Lakes region as a vacation destination will be an expanded tourism promotional campaign. Emphasis should be given to regional pooling, concentrated advertising during key vacation planning months, and increased promotion to the key Twin Cities, Chicago and Duluth markets. A detailed marketing plan should be developed to help increase overall promotional effectiveness.

Match of Proposed New Projects to Suggested Iron Range Tourism Development Strategies

- All Iron Range tourism development proposals should be weighed against a set of identified screening criteria prior to releasing IRRRB development resources or commissioning further project planning activity.
- On the basis of a set of six criteria drawn from the analysis of this study, a total of 11 proposed Iron Range tourism development projects were assessed.
 - * Projects judged favorable to Iron Range tourism development include establishment of a cooperative advertising program and a regional tourism advisory committee, development of a rotating program of exhibits at the Interpretative Center and new camping and trail programs at the Glen Mine site, and the institution of an annual region-wide summer festival.
 - * Projects that should be pursued with a critical eye on program feasibility and private sector investment include the proposed convention center and tramway at the Glen Mine complex, as well as the Oldtown-Finntown

Restoration in Virginia and the Giant's Ridge
Recreation/Camping program near biwabik.

- * Two projects outside the Hibbing, Virginia, Hoyt Lakes Region should not be supported. These are the Hill-Annex Mine Interpretive Park in Calumet and the Pioneer Mine Restoration in Ely. In addition, no further investment should be made in the Bruce Headframe Restoration near Chisholm.
- * The Iron Range Country program should be de-emphasized as a tourism development program on the Range. Its strength is in supporting parallel mining and historical attractions across the breadth of the Iron Range Tail. This clearly runs contrary to the critical need to develop an identifiable vacation destination area on the Range.
- The development of a new tourism industry on the Range will require time, patience, resources, careful planning, local entrepreneurial risk taking, and community support and participation. If, in the end, the ingredients required for tourism development do not materialize in the Hibbing, Virginia, Hoyt Lakes Region, the IRRRB may find it more appropriate to invest staff time and resources in other economic development ventures or in other already developed tourism centers within the jurisdiction of the IRRRB

INTRODUCTION AND BACKGROUND

Background Situation

The Iron Range Resources and Rehabilitation Board (IRRRB) is a Minnesota state board responsible for strengthening and diversifying the economy of Minnesota's Iron Range Region. The IRRRB carries out this function through the allocation and investment of iron ore and taconite occupation and production tax revenues in a wide range of public works, research, reclamation and economic development projects.

Beginning in the early 1970's, the IRRRB has taken on an increasingly important role in a program intended to develop an economically viable tourism industry on the Range. This program, the Iron Range Interpretative Program, is a unique attempt to build a tourism base--where no base previously existed--by concentrating public monies in the preservation and promotion of the Region's rich natural, historic and cultural resources. To the present time more than \$7.8 million in public funds have been invested in the planning, design and/or construction of more than twenty historic and interpretative sites; principal among these is the Iron Range Interpretative Center complex in Chisholm, Minnesota.

With the main Interpretative Center and several other facilities and sites open to the public or scheduled to open in the near future, the IRRRB, in early 1979, determined the need to assess the effectiveness and potential of the Iron Range Interpretative Program in achieving the development of a new tourism industry on the Range. This led to the awarding of a competitive contract to Midwest Research Institute (MRI) to assess the feasibility of this tourism development program and to provide guidance in improving its performance.

Presentation of Study Findings

The primary emphasis of this study has been on the feasibility of the tourism components of the Iron Range Interpretative Program. At the same time it has been necessary to recognize that the Interpretative Program is not operating in a vacuum: that the success and productivity of the program is as much dependent on other tourism and related economic issues in the state and region as it is on the activities and programs of the IRRRB. For this reason, the report includes an analysis of tourism development from a state and regional perspective and then narrows to a discussion of the more directly pertinent Iron Range tourism program components.

The report contains MRI's findings and recommendations. It is organized into five major sections presenting information pertinent to assessing the:

- Growth and current impacts of the Iron Range Interpretative program,

- Characteristics of the tourism market in the state and region,
- Problems and issues facing the IRRRB in tourism development,
- Strategies for improving program performance, and
- Guidelines for future program development.

Information and Data Sources

The research effort was supported by information obtained from current published sources, from contacts and interviews with state and local experts in tourism and Iron Range development, and from a survey of vacationers to Minnesota conducted to generate data specifically for this study.

The most pertinent sources of information used in this study were the Interpretative Program records and materials provided by the IRRRB and the planning data of the Minnesota Department of Economic Development's Tourism Bureau. In addition, a significant amount of more general information was made available by the chambers of commerce of several Iron Range communities, the State Department of Natural Resources, and many other regional and local groups involved in Northeast Minnesota tourism and economic development. Because published information can tell only half the story, this base information was augmented by conversations with state tourism experts, IRRRB staff members, Iron Range development promoters, community leaders and managers of major lodging places on the Range.

A major element in this study effort has been the establishment of an accurate and refined tourism data base reflecting the characteristics, interests and travel behavior of the approximately 670,000 families and households in the 11 North Central Region states that vacationed in Minnesota in 1979. This data does not merely allow the examination of the characteristics and behavior of tourists to the state as a whole; it also provides detailed information on vacationers to Northeast Minnesota and even on visitors to specifically identified regional attractions and cities, such as the North Shore, Hibbing, and the Iron Range Interpretative Center. Because it contains information about travel behavior in both 1978 and 1979, the data base also provides important new information on the impact of energy and inflation on travel behavior in Minnesota and the Northeast Minnesota region.

The 700 families and households surveyed as part of this study were *actual* vacationers to Minnesota in 1979 as opposed to a sample of *potential* Minnesota vacationers. This is a critical distinction when examining, as we have, the success of an existing tourism program. The sample was based on a previous survey of some 16,500 Midwest families and households completed by a member of the MRI project team, Thomas von Kuster and Associates, Inc., for the State

Department of Economic Development in 1979. Because the survey was based on a carefully screened panel of Midwest families and households maintained by National Family Opinion, Inc., a national survey research firm, the validity of the sample, the response rate, and the accuracy of results are very high.

I. DEVELOPMENT AND CURRENT STATUS OF THE IRON RANGE INTERPRETATIVE PROGRAM

History of IRRRB Tourism Development Efforts

The key instrument available to the IRRRB for development of tourism has been the Iron Range Interpretative Program. The Program was organized by the Minnesota State Legislature in 1970 to develop and promote what was then called the "Iron Range Trail," a trail of mining and immigrant history crossing the state's three iron ranges--the Vermilion, the Mesabi and the Cuyuna--and much of northeastern Minnesota. The program was founded on the belief that a strong tourism industry could be developed on the Iron Range and that the establishment of this industry would be facilitated by a strong public effort to develop and promote the rich physical, historical, cultural and industrial heritage of the Range.

The first real public exposure to the program came in August 1977 with the opening of the Iron Range Interpretative Center at the Glen Mine site near Chisholm, Minnesota. Since then, three new additions--The Hall of Geology (opened in 1979), the Iron Range Research Center (opened in 1980), and the Ethnic Arts Center (expected to open in 1981)--have been built onto the main center. On the drawing board are several future development possibilities including a Conference and Convention Center, a Glen Mine Campsite and Trail program, and a Cable Car/Tram System spanning the Glen Mine open-pit area to a proposed recreational park. The location of the Interpretative Center complex in relation to the state's three iron ranges is shown in Figure 1.

Along with the development and expansion of the Glen Mine complex, the IRRRB has planned, funded or otherwise supported development of 12 other historic sites and interpretative facilities along the Iron Range Trail. Of the 12 program elements, only two are open to the public at this time. These are the Hill-Annex Interpretative Park in Calumet and the Croft Mine Park in Crosby. Three others expected to open this year are the Vermilion Range Cultural and Interpretative Center in Ely, the Rouchleau Mine Observation Area in Virginia, and the Hull-Rust Mine Observation Area in Hibbing. The other seven projects are stalled in their early planning stages. The names and locations of these 12 program sites are shown in Figure 2.

In addition to supporting historic and interpretative sites across the Range, the IRRRB has provided grants to a number of Iron Range attractions developed principally by other agencies and organizations. Eight of these programs are identified and located in Figure 3. At present all of these programs are operating with the exception of the Grace Living Art Center in Bovey and the Motorbus Transportation Center in Hibbing; these have not been funded beyond their initial planning stages.

The IRRRB has had operational jurisdiction over the Iron Range Interpretative Program since the early stages of planning and development of the Iron Range

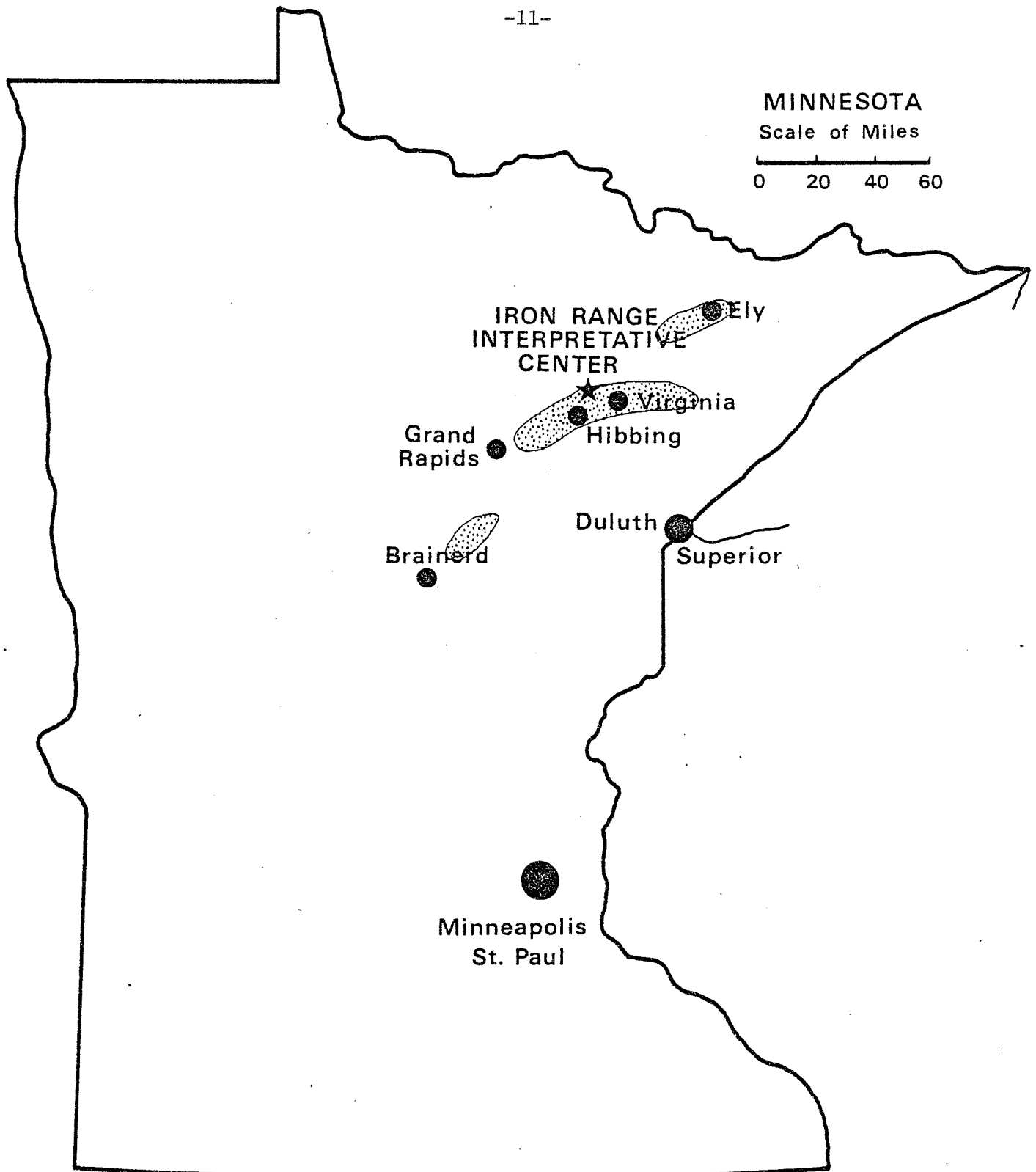


Figure 1. Location of the Iron Range Interpretative Center

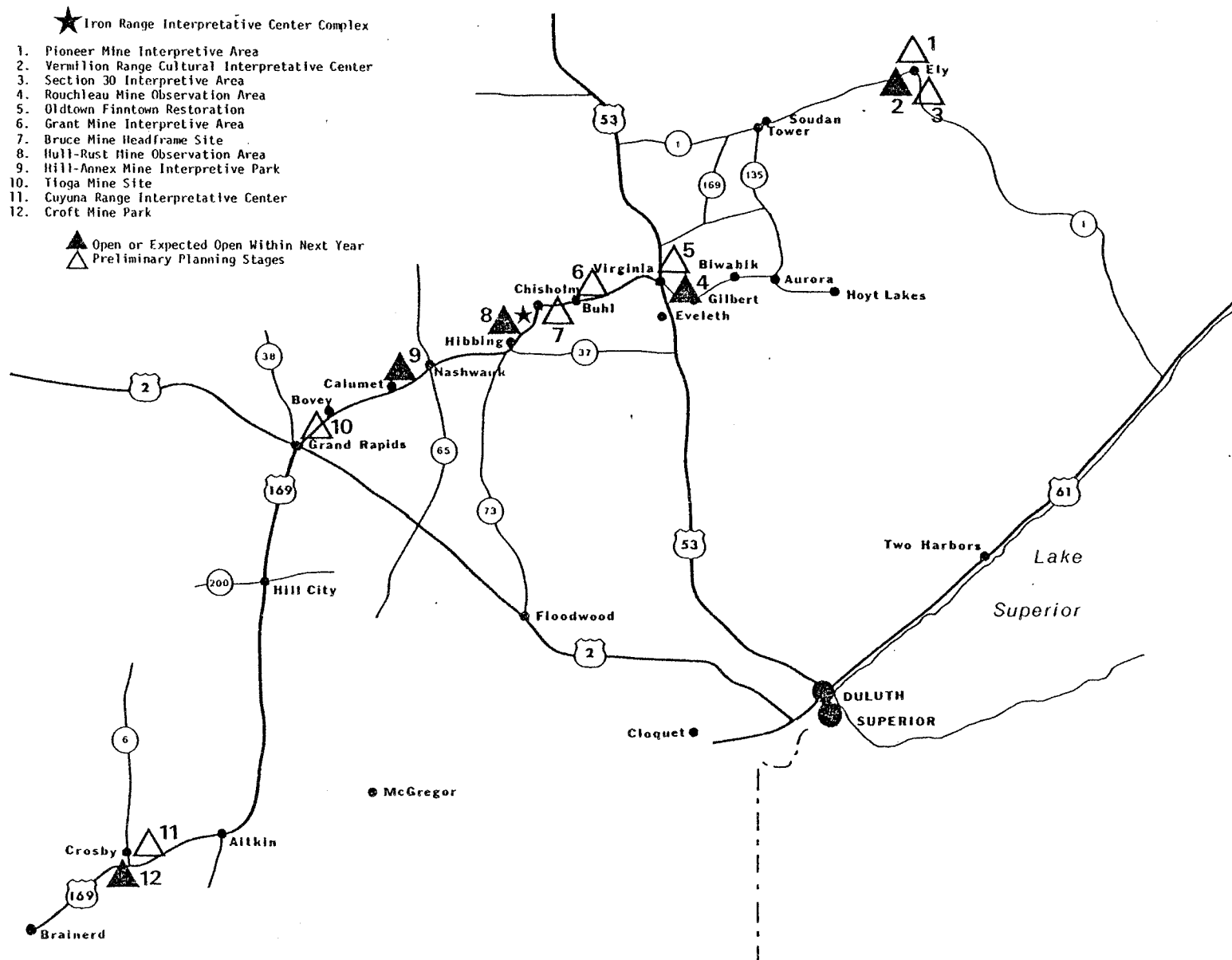


Figure 2. Location of 12 Primary IRIP Affiliated Sites

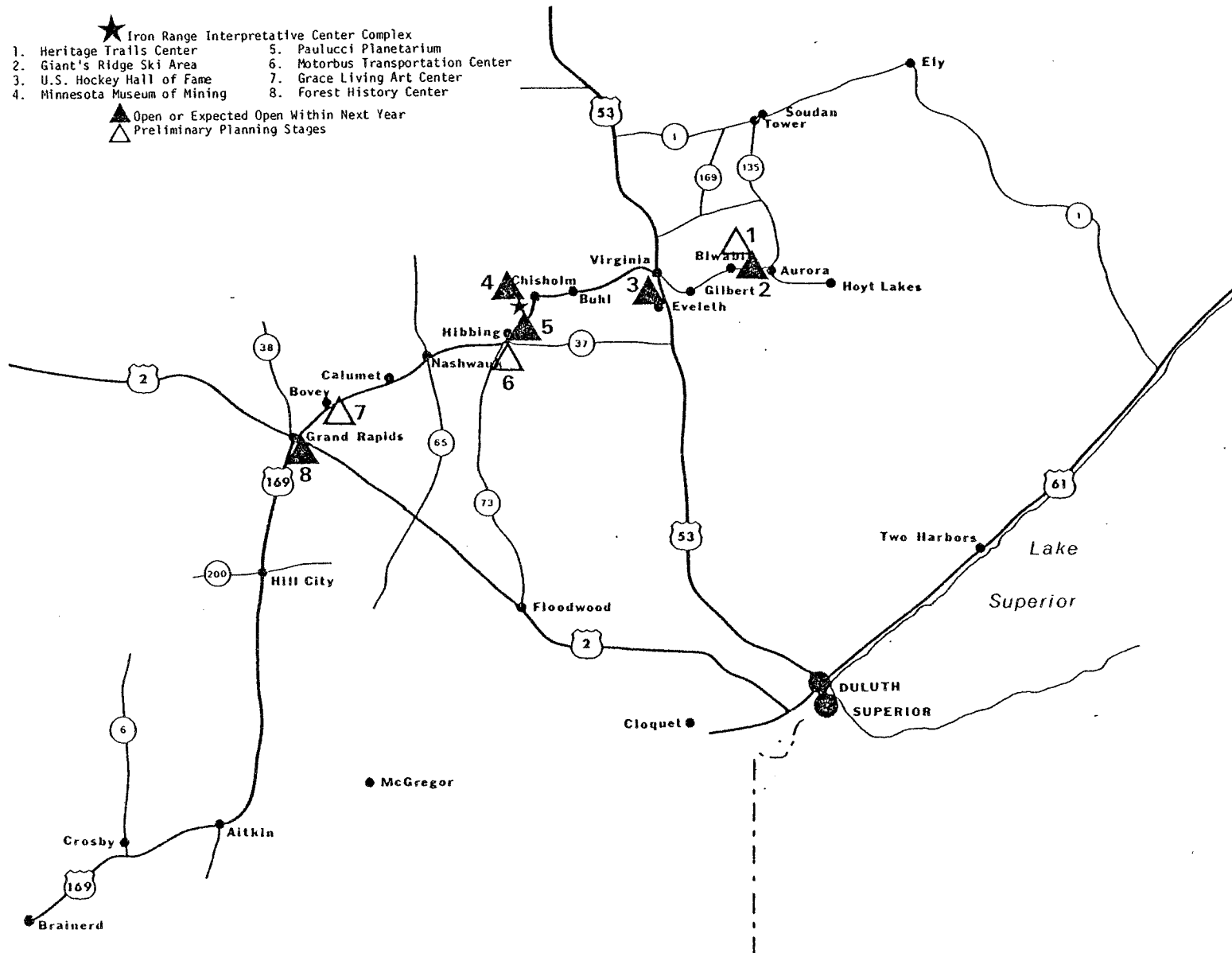


Figure 3. Location of Eight IRIP Cooperating Projects

Interpretative Center. The full program was solidified under the IRRRB in 1978 with the formal transfer of the Iron Range Trail program from the Minnesota Department of Natural Resources (DNR). The Trail program has since been renamed the Iron Range Country program and builds upon the historic preservation, promotion and coordination functions of the Interpretative Program.

The Iron Range Country program is intended to be the vehicle for drawing together the various historic, cultural and interpretative sites across the Range. One of the most recent developments associated with this program was the publication, in December 1979, of a tour guide to the sites and activities of the "Iron Range Country." A major highway signage program is also expected to get under way sometime soon.

In terms of broad-based tourism promotion, the Interpretative Program has chosen to focus its efforts on intercepting pass-through traffic going to and from the Voyageurs National Park and Boundary Waters Canoe Area (BWCA). A total of 100 kiosks have been placed at key locations on the Range and a new information center has been constructed and is operating at the Anchor Lakes area south of Eveleth. With the exception of the published tour guide, all promotion to this point has been built around individual sites and programs, such as the Iron Range Interpretative Center, rather than a broader, coordinated tourism program dealing with all sites and programs on the Range.

The Current Situation

While the Iron Range Interpretative Program has been in existence for ten years it has been functional in the tourism development sense only since August 1977, the opening date of the Iron Range Interpretative Center. The complete program is not fully operational since most of the historic and interpretative sites are yet to be opened to the public and the Iron Range Country program is still in the developmental stage. Based upon what has occurred to this point, however, it is possible to gain some sense of how well the program is operating and what kinds of development patterns may be expected in the future.

Iron Range Interpretative Center. The Glen Mine complex is, without doubt, the centerpiece of the Interpretative Program. Its development and construction reflect a commitment in excess of \$5.9 million in IRRRB, state and federal monies. The component costs of the various center projects are shown in Table 1. Of the total, over half (\$3.1 million) was spent in development of the main Iron Range Interpretative Center. The IRRRB has been the principal funding agency, committing \$3.9 million to the development and construction effort.

The Center was built on a scale deemed necessary to accommodate up to 225,000 visitors per year or a daily load of up to 1,000 visitors during peak summer months. The Center offers high quality exhibits, programs and informational resources touching on all aspects of the Range's physical, industrial, cultural and historical heritage.

Table 1. IRRRB and Other Public Funds Invested in Development and Construction of the Glen Mine Complex¹
(as of 6-17-80)

<u>Preliminary Costs & Working Drawings for the</u> <u>Iron Range Interpretative Center (1971-74)</u>		\$ 106,344
<u>Iron Range Interpretative Center (1975-79)</u>		3,124,350
* Exhibit Design	\$ 232,029	
* Preliminary Planning	103,180	
* Construction	2,789,141 ²	
<u>Hall of Geology (1977-79)</u>		460,007
* Exhibit Design	\$ 25,000	
* Preliminary Planning	44,699	
* Construction	390,308 ³	
<u>Ethnic Arts Center (1978-80)</u>		917,419
* Interior Design	\$ 55,751	
* Planning	2,000	
* Construction	859,668 ⁴	
<u>Iron Range Research Center (1977-79)</u>		1,096,876
* Architect	\$ 9,295	
* Collection Contract	5,000	
* Furnishings	100,000	
* Construction	982,581	
<u>Proposed Expansion (1978-79)</u>		245,685
* Tramway-Preliminary Design	\$ 70,000	
* Convention Center-Preliminary Design	175,685	
GRAND TOTAL - Glen Mine Complex		\$5,950,681
(IRRRB Funded Total - \$3,882,328)		

¹Does not include operating costs nor time commitments of IRRRB staff.

²Includes in construction cost total:

\$500,000 Minnesota State Appropriation

500,000 U.S. Department of Commerce, Economic Development Administration (EDA)

150,000 Upper Great Lakes Regional Commission (UGLRC)

and in exhibit construction:

\$ 8,000 American Revolutionary Bicentennial Commission

165,066 Friends of the Interpretative Center

202,751 National Endowment for the Humanities

³Includes in construction cost total, funding of \$142,566 from UGLRC.

⁴Includes in construction cost total, funding of \$400,000 from UGLRC.

SOURCE: Department of Iron Range Resources and Rehabilitation, memo dated 6-18-1980.

Table 2 presents a monthly record of attendance at the Center since its August 19, 1977, opening. During 1978, the Center's first full year, attendance totalled 78,538 visitors. This figure paralleled forecasts of initial first year attendance. During 1979, attendance jumped to 101,460 visitors, nearly half of whom were participants at an "Ethnic Week" festival held at the Center in August. By adjusting for the attendance impact of the ethnic festival, it is likely that the annual attendance figure would have dropped to a level below that of 1978, probably in the neighborhood of 70,000 visitors.

Rather than showing signs of attendance growth during the first months of 1980, the recorded trend has been downward. During the months January through May 1980, attendance totalled 13,000 visitors, a drop of 17.4 percent from the same months in 1979 and a 32.6 percent drop from 1978. While the Center is expected to benefit again from this year's expanded Ethnic Week celebration, it is becoming clear that the Center, as it is currently being operated and promoted, is not capable of achieving the attendance levels that it was designed to accommodate.

Affiliated and Cooperating Projects. More than \$1.9 million in IRRRB funds have been invested to date in the twelve affiliated and eight cooperating projects planned, developed or otherwise supported by the Iron Range Interpretative Program. The component costs for each of these twenty projects are shown in Tables 3 and 4. Of the nearly \$1 million spent on affiliated sites, more than a third (\$350,700) has gone towards construction of the Vermilion Range Cultural Interpretative Center in Ely, and a quarter (\$247,381) has been invested in the construction and start-up of the Croft Mine Park in Crosby. Construction of the two permanent observation stands at the Rouchleau Mine and the Hull-Rust Mine account for \$110,000 each. All of these major sites are expected to be open by the end of this year. To date, the disposition of IRRRB funds has been relatively equal among the three iron ranges.

The nearly \$1 million in cooperating program grants has been used almost entirely within the core Mesabi Range Area, including \$419,000 to the Paulucci Planetarium in Hibbing and \$253,900 to the Giant's Ridge Ski Area near Biwabik. Unlike the affiliated sites, these projects show a broader program emphasis and a more pronounced emphasis on tourism.

In the formulation of the Iron Range Interpretative Program, these affiliated and cooperating projects were conceived as instruments for intercepting pass-through traffic bound for the lake areas of the state and funneling them into the core area of the Range and the Iron Range Interpretative Center. Each project would offer a slightly different perspective on mining and history. Once drawn to one site, tourists would proceed to other, complementary sites as they learned about the Iron Range story. This is also the basis of the new travel guide promoting "Iron Range Country."

While most of the planned sites have yet to open to the public, it is the consultant's judgment, and the judgment of most of those interviewed, that

Table 2. Monthly Attendance Totals for the Iron Range Interpretative Center (with Percent Change from Previous Year)

	<u>1977</u>	<u>1978</u>		<u>1979</u>		<u>1980</u>	
	<u>Number</u>	<u>Number</u>	<u>Percent Change</u>	<u>Number</u>	<u>Percent Change</u>	<u>Number</u>	<u>Percent Change</u>
January	--	1,493	--	1,507	+ 1	1,294	-14.1
February	--	1,441	--	1,599	+ 11	1,515	- 5.3
March	--	2,991	--	2,225	- 25.6	2,341	+ 5.2
April	--	3,828	--	3,273	- 14.5	2,460	-24.8
May	--	9,534	--	7,131	- 25.2	5,390	-24.4
June	--	9,723	--	8,382	- 16		
July	--	18,253	--	15,927	- 12.7		
August	8,968	17,412	+95	46,440	+167		
September	6,563	6,431	- 2	7,363	+ 14.5		
October	3,456	4,864	+40	4,080	- 16.1		
November	1,585	1,602	+ 1	1,935	+ 20.7		
December	<u>1,124</u>	<u>966</u>	-14	<u>1,598</u>	+ 65.4		
TOTAL	21,696	78,538		101,460			

SOURCE: Iron Range Interpretative Center attendance records.

Table 3. IRRRB Funding of 12 Key IRIP Affiliated Sites¹
(as of 6-17-80)

1.	<u>Pioneer Mine Interpretative Area</u> (1978-79)		\$ 15,248
	* Feasibility Study	\$ 3,000	
	* Grants to City of Ely	9,565	
	* Brochure	2,683	
2.	<u>Vermilion Range Cultural Interpretative Center</u> (1979-80)		350,700
	* Construction	\$350,700	
3.	<u>Section 30 Interpretive Area</u> (Under Private Ownership)		-0-
4.	<u>Rouchleau Mine Observation Area</u> (1978-80)		111,525
	* Brochure	\$ 2,683	
	* Construction	106,903	
	* Interior Display	1,939	
5.	<u>Oldtown - Finntown Restoration</u> (1979-80)		3,420
	*Kaleva Hall Restoration	\$ 3,420	
6.	<u>Grant Mine Interpretive Area</u> (\$80,000 Budget Reallocated to Other Projects)		-0-
7.	<u>Bruce Head Frame Site</u> (1978-80)		2,683
	* Brochure	\$ 2,683	
8.	<u>Hull-Rust Observation Area</u> (1978-80)		111,525
	* Brochure	\$ 2,683	
	* Construction	106,903	
	* Interior Display	1,939	
9.	<u>Hill-Annex Interpretive Park</u> (1978-80)		100,000
	* Working Budget	\$100,000	
10.	<u>Tioga Mine Site</u> (\$90,000 Budgeted for Physical Landscaping and Interpretative Site)		-0-
11.	<u>Cuyuna Range Interpretative Center</u> (1975-76)		10,000
	* Development Study	\$ 10,000	
12.	<u>Croft Mine Park</u> (1979-80)		247,381
	* Construction Costs	\$152,650	
	* Operating & Security Costs	94,731	
TOTAL IRRRB FUNDING			\$952,482

¹Does not include IRRRB staff time spent in support of these projects.

Table 4. IRRRB Grants to Eight IRIP Cooperating Projects
(as of 6-17-80)

1.	<u>Heritage Trails</u> (1974-75)		\$ 10,000
	* Develop and Improve Beach and Swimming Facilities	\$ 10,000	
2.	<u>Giants Ridge Ski Area</u> (1977-80)		253,900
	* Purchase Snow Making Equipment	\$ 50,000	
	* Snow Groomer	38,000	
	* Improvement and Debt	35,000	
	* Debt Retirement	10,900	
	* Develop Ski Area	120,000	
3.	<u>U.S. Hickey Hall of Fame</u> (1976-80)		94,952
	* Display Equipment	\$ 49,952	
	* Promotion	45,000	
4.	<u>Minnesota Museum of Mining</u> (1977-80)		13,375
	* Develop Promotional Material	\$ 2,500	
	* Blacktop Parking Lot	10,875	
5.	<u>Paulucci Planetarium</u> (1974-80)		419,230
	* Feasibility Study	\$ 4,230	
	* Construction	415,000	
6.	<u>Motorbus Transportation Center</u> (1975-76)		3,900
	* Preliminary Planning	\$ 3,900	
7.	<u>Grace Living Art Center</u> (1975-76)		2,400
	* Preliminary Planning	\$ 2,400	
8.	<u>Forest History Center</u> (1974-78)		175,637
	* Program Development and Staffing	\$ 45,492	
	* Construction	-130,145	
IRRRB GRANT TOTAL			\$973,394

SOURCE: Department of Iron Range Resources and Rehabilitation

these projects are too similar to the kind of program offered at the Interpretative Center. Rather than creating interest among visitors in seeing the main Interpretative Center, these sites may well have the effect of siphoning off potential visitors to the Center or at least reducing the frequency of vacationers returning to the Center

Limited information is available at this time to judge the economic feasibility of these affiliated and cooperating projects. Based on location, program management and level of community support, it is the consultant's judgment that the only project with a strong probability of succeeding independently of IRRRB support is the Vermilion Range Cultural and Interpretative Center located at the Vermilion Community College in Ely. Other projects, such as the Minnesota Museum of Mining and the U.S. Hockey Hall of Fame, have been open for a number of years but have yet to prove their independent financial viability.

Conclusions and Next Steps

The Iron Range Interpretative Program is ably suited to educating visitors in the history and heritage of the Range. There is good reason to believe that the unique historical and cultural resources of the Region offer a justifiable base on which to build an Iron Range tourism industry. The mistake made by the IRRRB--and by most others that have tried to tie history in with tourism--is in assuming that in promoting history, one promotes tourism.

In tourism development the emphasis must be on determining what is needed to attract tourists to the Iron Range and what will hold them there long enough for the area to gain some economic benefits from these visitors. To be successful in developing tourism, the IRRRB must accept the fact that the Range must compete head-on against the strong and established lake areas of northern Minnesota. ✓

In a later section of this report, a strategy is proposed for making the Iron Range a competitive tourism area. Before that point, however, it is important to establish what the Minnesota tourism market really is and what problems the Iron Range and the IRRRB must solve in establishing a new tourism development strategy.

II. ANALYSIS OF MARKET SIZE AND VACATIONER CHARACTERISTICS

This chapter presents the findings of a survey of vacationers to Minnesota in 1979. The data reflect the actual travel behavior of all Midwest vacationers to Minnesota that year and provide the base for determining the size and characteristics of the tourism market from which the IRRRB can most likely attract vacationers to the Range. A copy of the survey is provided in Appendix A.

The survey results are organized to show totals for the state and for the state's tourism regions. As shown in Figure 4, the Arrowhead and Heartland Regions of the state were combined in the survey to reflect the general parameters of the IRRRB Region. This IRRRB/Northeast Region is particularly important for this study since it is the vacationers to this region that are already predisposed towards northeast Minnesota attractions.

An Estimate of the Market Size

In 1979 an estimated 2.1 million overnight vacation trips were taken by variously sized parties (e.g., families and unattached individuals) in Minnesota. This is up from 2.0 million trips in 1978. Estimated expenditures on these vacations were \$436 million, making tourism one of the largest industries in Minnesota. The region in which the Iron Range is located captured the largest proportion of these vacations of any region in the state. An estimated 48 percent of all Minnesota vacations in 1979 were taken in the state's Northeast Region. The Metroland Region attracted 19 percent of all vacationers to Minnesota and the remaining 33 percent was shared by the other Minnesota tourism regions. In other words, the Northeast Region in 1979 hosted over one million vacationing parties who spent \$249 million on vacations to that region. Since the average vacationing party took about 1.5 vacations to the Northeast Region that year, the actual number of different parties vacationing in the Region was in the range of 670,000. With an average of 3.27 persons per party, the total number of vacationers to the Northeast Region in 1979 totalled about 3.2 to 3.3 million people.

Demographic Descriptions of Vacationers to Minnesota

There are some interesting comparisons between vacationers to Minnesota as a whole and to its various regions. As shown in Table 5, the Northeast Region attracts a very different segment of the tourism market than do the other regions of the state. Compared to these other regions, the Northeast attracts both younger and more wealthy vacationers. Over 59 percent of the vacationing parties to the Northeast Region have incomes in excess of \$19,000. This is explained by the fact that nearly half of the vacationers to the Region are in their peak income years, ages 30 to 50 years. The Northeast Region has been less successful than the other regions in attracting vacationers over 60 years of age. This may suggest an area of opportunity for the IRRRB in future tourism promotion.

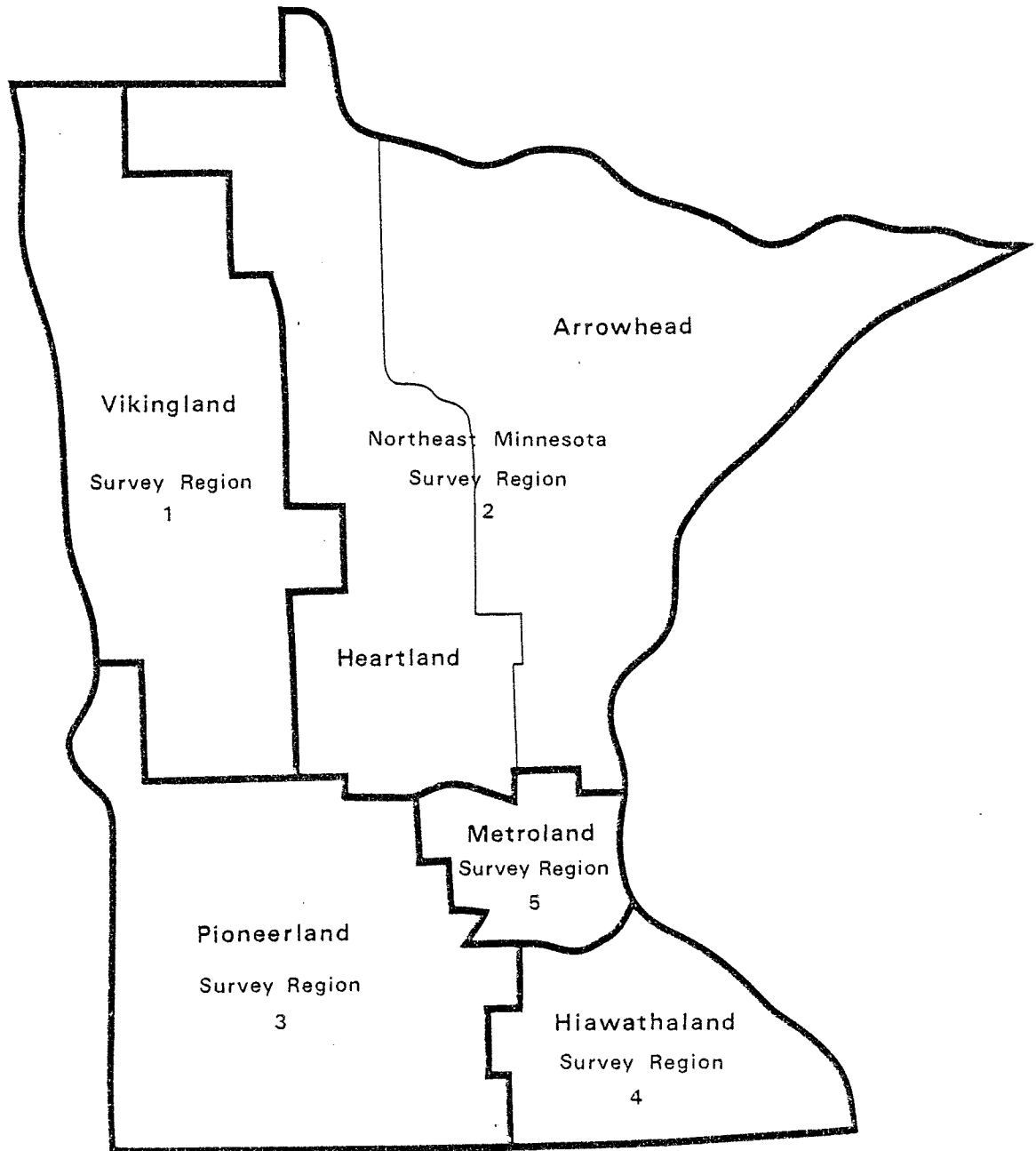


Figure 4. Minnesota Survey Regions Compared with State Tourism Regions

Table 5. Demographic Characteristics of Vacationers
in Minnesota in 1979 (percent*)

<u>Market Segment</u>	<u>Minnesota (338)</u>	<u>Northeast Region (160)</u>	<u>Other Regions in Minnesota (192)</u>
INCOME			
Under \$8,000	7.8	4.9	8.8
\$8,000 - \$13,999	16.9	14.9	20.3
\$14,000 - \$18,999	20.5	20.8	20.3
\$19,000 - \$34,999	45.2	49.5	42.8
Over \$35,000	9.6	9.9	7.8
	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
AGE			
Under 30 Years	12.2	15.6	12.2
30 - 39 Years	23.4	26.9	21.1
40 - 49 Years	20.0	21.9	19.1
50 - 59 Years	22.2	20.6	20.1
Over 60 Years	22.2	15.0	27.5
	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
OCCUPATION - Female			
Professional	13.3	15.0	14.6
Farming	.9	.6	1.0
Management	3.3	4.4	2.6
Clerical	19.5	18.1	19.3
Sales	2.7	3.7	1.6
Crafts	.9	1.9	1.0
Operative	1.8	1.2	2.1
Service	6.2	8.1	5.2
Retired/Student/Homemaker	51.4	47.0	52.6
	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
OCCUPATION - Male			
Professional	24.0	28.2	18.2
Farming	7.7	7.5	8.9
Management	14.5	13.1	16.7
Clerical	1.8	1.9	1.6
Sales	3.8	3.1	4.7
Crafts	13.9	16.2	12.0
Operative	9.5	11.2	8.3
Service	3.8	5.6	1.0
Labor	2.1	2.5	2.6
Retired/Student	18.9	10.6	26.0
	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>

*May not add to 100% due to rounding.

Table 5. Demographic Characteristics of Vacationers
in Minnesota in 1979 (percent*) (Continued)

<u>Market Segment</u>	<u>Minnesota (338)</u>	<u>Northeast Region (160)</u>	<u>Other Regions in Minnesota (192)</u>
EDUCATION - Female			
Less than 8 Years	.3	1.2	.5
8 - 11 Years	8.3	6.8	8.4
High School Graduate	45.5	45.7	43.9
Less than College Graduation	25.6	25.2	25.4
College Graduate	15.5	15.6	16.1
Post Graduate	4.8	5.5	5.7
	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
EDUCATION - Male			
Less than 8 Years	5.9	6.3	5.2
8 - 11 Years	16.9	14.4	20.3
High School Graduate	34.0	35.0	32.3
Less than College Graduation	16.9	16.2	16.2
College Graduate	11.8	8.8	14.6
Post Graduate	14.4	19.4	11.4
	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
FAMILY SIZE			
1 Person	1.2	--	1.6
2 People	39.3	32.5	43.2
3 People	19.5	22.5	16.7
4 People	22.8	28.8	23.4
5 People	17.2	16.2	15.1
	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>

*May not add to 100% due to rounding.

The occupational descriptors are less distinctive. Compared to the other areas of the state, the Northeast Region attracted a higher proportion of professionals, craftspersons and operatives. In terms of the largest category, retired persons/students/homemakers, the Northeast Region attracted a substantially smaller share, suggesting again the potential opportunity to attract new groups of senior citizens into the Iron Range Region.

The heads of households/families who vacationed in Northeast Minnesota also tend to be better educated. Thirty-five percent of the male vacationers to the Northeast were high school graduates and 8.8 percent were college graduates. The Region had a much larger share (19 percent) of vacationers with post-graduate education and a smaller share (14 percent) with 8 to 11 years of education than did the rest of the state.

In terms of family size, the Northeast Region attracted a large proportion of families with children or other household members (i.e., more than 2 members) who vacationed in that area than in any other region of the state. Two-thirds of the parties vacationing in the Northeast Region had at least three members. Forty-five percent had at least four members in their vacationing party.

For the IRRRB and its interest in promoting tourism on the Range, these demographic characteristics should be encouraging. The typical vacationing party, already coming to the Northeast Region, is very attractive--young, well-educated, upper income, and in family parties. The challenge is to offer attractive programs and facilities to these families while they are in the area on active summer vacations. Another challenge is to lengthen the season into the fall by offering programs appealing to older working and retired couples who travel more frequently in the fall (after Labor Day) but who are not currently going to the Northeast Region as often as to the remainder of the state. By lengthening the season, the Iron Range also benefits by making more productive use of existing lodging and program facilities. This effort to stretch the season would coincide with State Tourism Bureau strategies developed earlier this year.

Place of Residence of Vacationers to Minnesota

The state and places of residence of Midwest vacationers to Minnesota are indicated in Table 6. More than half (55.6 percent) of the vacationing parties in the Northeast Region in 1979 came from within the state. This is a substantially higher proportion than for any of the other regions of the state. The other states providing substantial numbers of tourists to Northeastern Minnesota include: Illinois (11.2 percent), Wisconsin (7.5 percent) and Iowa (6.9 percent).

Also of significance is the fact that a sizable share (43.8 percent) of the vacationing parties to Northeast Minnesota came from major urban centers with populations in excess of two million people. Given the states of

Table 6. State of Residence and Population Density of Area/City of Origin of Vacationers in Minnesota (Percent*)

<u>State of Residence</u>	<u>Minnesota (338)</u>	<u>Northeast Region (160)</u>	<u>Other Regions in Minnesota (192)</u>
Illinois	12.1	11.2	9.9
Indiana	4.1	6.3	1.0
Iowa	12.4	6.9	16.7
Kansas	.9	1.2	1.0
Michigan	2.7	1.9	3.1
MINNESOTA	42.3	55.6	37.5
Missouri	1.2	.6	1.6
Nebraska	3.8	2.5	4.7
North Dakota	7.7	5.0	9.4
Ohio	.9	.6	1.0
South Dakota	3.3	.6	5.2
Wisconsin	8.0	7.5	7.8
Other	<u>.2</u>	<u>--</u>	<u>1.0</u>
	100.0	100.0	100.0
 <u>Population Density</u>			
2,500 - 49,999	41.7	35.0	49.0
50,000 - 499,999	17.2	14.4	18.8
500,000 - 1,999,999	8.6	6.9	9.4
2,000,000 and Over	<u>32.5</u>	<u>43.8</u>	<u>22.9</u>
	100.0	100.0	100.0

*May not add to 100% due to rounding.

residence, this would indicate that roughly one-third of the vacationers to the Northeast came from the Twin Cities and another five to ten percent came from the Chicago area. An estimated ten percent of Northeast vacationers were residents of the Duluth area. This information suggests a major opportunity to concentrate tourism promotion within major advertising markets: the Twin Cities, Duluth and Chicago.

Main Purposes of the Vacation

Most vacationers have more than one purpose for taking a vacation trip. As shown in Table 7, more than 70 percent of the vacationers to Northeast Minnesota were pursuing summer activities. Also important, but to a lesser extent, were vacations to visit family and friends (37.5 percent) sightseeing (34.7 percent) and shopping (24.1 percent).

This information can be very important to the IRRRB. It means that parties coming to the Northeast Region are coming for leisure-time and outdoor activities and are likely to be influenced by appeals and information about interesting and participatory activities and events. Furthermore, the appeal of shopping appears strong enough to suggest that well-placed and managed concession areas (i.e., gift/craft shops, food services, etc.) could have strong tourist appeal at the IRRRB's interpretative facilities.

Vacation Patterns

Length of Stay at Destination. While vacations to the Northeast Region tend to be longer than in the other regions, the overall length of vacations in Minnesota has dropped significantly in just the past decade. (See the discussion in the next section.) The length of stay at destination sites in the Northeast Region is indicated in Table 8. Almost 60 percent of vacations to Northeast Minnesota are less than a week in length, with 26.4 percent just one to two days.

Mode of Transportation (Table 9). More than 80 percent of all vacation traveling to the Northeast Region was accomplished by automobile. Northeast Minnesota travelers used other modes of transportation slightly more often than the state average. While these percentages remain relatively low, nearly 20 percent used and RV or truck/van to reach the Northeast. These travelers are usually campers and require overnight facilities with suitable parking and electrical and water connections for their stays in any one spot.

Vacation Expenditures. Vacationers to Minnesota in 1979 spent an average of \$220 per travel party for their vacation. The average expenditure in the Northeast Region was somewhat higher, \$234 per party. Only 25 percent of the vacationing parties to the Northeast Region reported spending less than \$90 on their vacation.

Table 7. Regional Destination and Main Purpose of Vacation Trip
in Minnesota, Proportion of Purposes and Trips Taken
(percent*)

Destination in Minnesota	<u>Main Purposes of Vacation</u>											
	<u>Visit Family and Friends</u>		<u>Summer Activities</u>		<u>Winter Activities</u>		<u>Metro Sightseeing</u>		<u>Nonmetro Sightseeing</u>		<u>Shopping</u>	
	<u>Regional Share</u>	<u>Percent of Trips**</u>	<u>Regional Share</u>	<u>Percent of Trips**</u>	<u>Regional Share</u>	<u>Percent of Trips**</u>	<u>Regional Share</u>	<u>Percent of Trips**</u>	<u>Regional Share</u>	<u>Percent of Trips**</u>	<u>Regional Share</u>	<u>Percent of Trips**</u>
Northeast Region (216)	33.6	37.5	57.8	70.4	48.1	11.6	39.4	13.0	56.4	34.7	65.8	24.1
Northwest Region (49)	11.6	57.1	11.4	61.2	15.4	16.3	4.2	6.1	10.5	28.6	16.5	26.5
Southwest Region (45)	10.4	55.6	9.9	57.8	7.7	8.9	7.0	11.1	15.8	46.7	11.4	20.0
Southeast Region (58)	19.1	79.3	7.6	34.5	7.7	6.8	16.9	20.7	9.0	20.7	3.8	5.2
Twin Cities Greater Metro Area (85)	25.3	71.8	13.3	41.2	21.2	12.9	32.4	27.1	8.3	12.9	2.5	2.4
	100.0		100.0		100.0		100.0		100.0		100.0	
Not Sure (63)***												
(Total Trips in Regions 453)												

*Figures may not add to 100% due to rounding.

**Percentage of trips totals more than 100% because some vacationers took more than one trip.

***Category of Not Sure is not included in the total.

Table 8. Length of Stay at Vacation Destination
in Minnesota (percent*)

<u>Length of Stay</u>	<u>Minnesota (516)</u>	<u>Northeast Region (216)</u>	<u>Other Region in Minnesota (265)</u>
1 - 2 Nights	32.2	26.4	36.6
3 - 6 Nights	36.8	33.3	39.6
6 - 8 Nights	17.8	22.7	13.2
9 - 11 Nights	4.1	5.6	3.8
12 - 14 Nights	6.0	7.4	5.7
More than 14 Nights	<u>3.1</u>	<u>4.6</u>	<u>1.1</u>
	100.0	100.0	100.0

*Figures may not add to 100% due to rounding.

Table 9. Mode of Transportation for Vacations in
Minnesota by Type of Conveyance (percent*)

<u>Mode of Transportation</u>	<u>Minnesota (516)</u>	<u>Northeast Region (216)</u>	<u>Other Region in Minnesota (265)</u>
Air	2.1	1.9	1.5
Auto	82.4	80.1	86.4
Bus	2.3	3.2	1.5
Recreation Vehicle (RV)	6.4	7.9	4.5
Truck/Van	4.8	9.3	1.5
Other	<u>2.5</u>	<u>7.9</u>	<u>1.1</u>
	*	*	*

*Multiple responses were allowed and also some respondents did not answer;
totals do not equal 100%.

In summary, the survey findings indicate that most trips to Northeast Minnesota are relatively short (less than a week) and are taken by car. Consistent with the demographic data, vacationers to the Northeast tend to spend more money while on their vacations than in any of the other state regions. As the next section will show, however, there are new constraints of costs and time which could work against these advantages. Reduced energy supplies, increased costs and lower speed limits all work to reduce the vacationers' ability to travel long distances. At the same time, inflation has meant that more dollars pay for fewer vacation days and attractions than in the past.

Overnight Accommodations

As shown in Table 10, there are some significant differences in the choice of accommodations by vacationers in the various regions of the state. Only a quarter of the vacationing parties in the Northeast Region stayed in homes of friends and relatives. This figure was far less than the state average of 42 percent.

The proportions of vacationers who stayed in a campsite or in a resort/lodge in the Northeast Region are also much greater than for vacationers who chose these types of accommodations in the other regions of the state. The occupants of the resort/lodge or campsites represented 20.5 percent and 21.7 percent, respectively, of the total responses in the Northeast Region. The corresponding figures for the other regions were 9.9 percent and 11.6 percent.

The Iron Range and most of northern Minnesota is faced with a dilemma of not having enough places for summer visitors to stay. The problem is made more difficult by inflation and high interest rates which reduce the likelihood of new private investment in expanded lodging and campsite accommodations. Future promotional and program development efforts must recognize these constraints on tourism growth.

Sources of Information in Choosing Vacation Destination Areas

Overall, it appears that most vacation destination plans are based on previous vacation experience and the advice of friends and relatives. As indicated in Table 11, only about 20 percent of the vacationers to Northeast Minnesota based their decision on printed information, advertising or other sources. This further points up the advantage of long established tourism areas in the state (e.g., the Gull Lake area near Brainerd) where tourists have established regular patterns and return year after year. For the IRRRB, this may suggest the need to concentrate on new or young vacationers to Northeast Minnesota who have not as yet cemented their vacation patterns.

Table 10. Accommodations While Vacationing Minnesota (percent*)

<u>Places Stayed</u>	<u>Minnesota (569)</u>	<u>Northeast Region (244)</u>	<u>Other Regions in Minnesota (293)</u>
Home of Relatives or Friends	42.0	26.2	53.2
Motel or Hotel	21.3	20.5	21.5
Resort or Lodge	14.4	20.5	9.9
Campsite	15.1	21.7	11.6
Own Home, Cottage or Cabin	6.5	10.2	3.1
All Other	.7	.8	.7

*May not total 100% due to rounding.
Multiple responses were allowed.

Table 11. Minnesota Traveler's Sources of Information
About Vacation Destination (percent*)

<u>Source of Information</u>	<u>Minnesota (598)</u>	<u>Northeast Region (268)</u>	<u>Other Regions in Minnesota (288)</u>
Had Been There Before	62.0	60.0	62.5
Advice from Friends and Relatives	18.7	19.4	19.8
Wrote for Information	6.0	9.0	4.9
Advertising	3.3	3.0	4.2
AAA/Travel Agent/News Articles/ State Tourism Bureau	4.3	4.1	5.2
All Other	5.5	4.5	3.4
	100.0	100.0	100.0

*May not total 100% due to rounding.

Activities of Vacationers

Vacationers to Minnesota and the Northeast Region engaged in a wide variety of vacation activities. A list of 37 vacation activities was developed for the survey. They were grouped into four general categories: outdoor activities, sightseeing/cultural activities, sporting events, and relaxation. The distribution of responses in these four areas is indicated in Table 12. More than half of the vacationers to Northeast Minnesota engaged in outdoors activities while another 35 percent spent their time engaged in sightseeing and cultural activities. Only one percent reported being involved in sporting activities.

Irrespective of the region visited in Minnesota, fishing ranked first in participation among the 16 different outdoor activities listed. This was followed by boating, swimming, hiking and camping, in that order.

Among 15 different sightseeing/cultural activities, shopping was the most frequently mentioned activity. This was true for the state as a whole and for its separate regions. Shopping was followed, in all regions, by nature study and visiting national and state parks.

Season of Travel

As one would expect, summer months are the busiest for tourist travel for both Minnesota as a whole and for each of the regions. As shown in Table 13, about 54 percent of the Minnesota trips and about 64 percent of the Northeast Region trips were taken during the months of June, July and August. However, the Northeast Region attracts less than the average number of travel parties during the rest of the year. In contrast, although the summer months were busy also in the other regions, the summer vacationers there accounted for only 48 percent of the annual tourists; the fall season (26 percent) and the month of December (11 percent) were relatively busy for these regions. The Northeast's share for the fall season was 20 percent and 1.4 percent for the month of December.

The vacation market in the Northeast Region appears to be very much concentrated during the summer months and may face overcrowded conditions during those months. Therefore, an opportunity exists for the IRRRB to extend the travel seasons in the area through use of new programs/facilities that will appeal to working older couples, retired couples and younger working couples without children.

Table 12. Major Categories of Activity of Vacationers in
in Minnesota (percent**)

<u>Category of Activity</u>	<u>Minnesota (2144)</u>	<u>Northeast Region (984)</u>	<u>Other Regions in Minnesota (1024)</u>
Outdoor Activities	43.3	50.1	34.8
Sightseeing/Cultural Activities	39.3	35.4	45.3
Sporting Activities	2.0	1.1	2.9
Relaxation	<u>15.4</u>	<u>13.4</u>	<u>17.0</u>
	100.0	100.0	100.0

*Questions were asked about various activities in each category; a summary
for each category is presented here. Multiple responses were allowed.
**Figures may not add to 100% due to rounding.

Table 13. Month of Travel for Trips Taken by
Vacationers in Minnesota (percent*)

<u>Month Trips Were Taken</u>	<u>Minnesota (516)</u>	<u>Northeast Region (216)</u>	<u>Other Regions in Minnesota (265)</u>
January	1.6	.9	2.6
February	1.7	2.3	1.5
March	2.1	1.4	2.6
April	2.3	2.8	1.1
May	7.9	6.9	8.3
June	15.1	17.6	12.8
July	22.5	27.8	17.4
August	16.3	18.5	17.0
September	11.4	9.3	12.5
October	6.2	6.5	6.4
November	6.0	4.6	7.2
December	<u>6.8</u>	<u>1.4</u>	<u>10.6</u>
	100.0	100.0	100.0

*Totals may not add to 100% due to rounding.

III. FACTORS LIMITING TOURISM DEVELOPMENT ON THE IRON RANGE

The description of the Iron Range Interpretative Program in Section I and the assessment of tourism in the Northeast Region of Minnesota in Section II raise a number of questions about the current assumptions supporting the IRRRB's tourism development. Despite being located in the center of the state's major tourism region--a region attracting an estimated 3.3 million vacationers a year--the Iron Range Interpretative Program has shown no appreciable growth in support and attendance and has had no observed commercial or economic impact on the Iron Range Region. In this section, the analysis will focus on the perceived weaknesses of the Interpretative Program and on other more general constraints to tourism development on the Iron Range.

Overemphasis on Attracting Pass-Through Traffic

The Iron Range Interpretative Program was envisioned from its start as a program to capitalize on the large amount of traffic that passes through Virginia and Hibbing on the way to the Boundary Waters Canoe Area (BWCA), the Voyageurs National Park and other state and national forests to the north and east of the core Iron Range area. Early descriptions of the program suggested that the key to promoting the Iron Range to tourists was to interest them in the "Iron Range Story."* The Iron Range Trail program was seen as a relatively painless way to teach the history of the Range to the pass-through motorists on the way to other destinations in the Northeast Region.

The Iron Range Interpretative Center was conceived as a major regional tourism attraction capable of sidetracking these pass-through motorists long enough to interest them in spending some time visiting other interpretative sites on the Range. The other affiliated sites, located in cities like Ely and Crosby, were intended to entice vacationers at these locations back into the Range and into the Interpretative Center.

The concept of appealing to pass-through vacationers requires that several conditions be met. *First*, it requires that pass-through vacationers have sufficient time to make side trips or stop overs. While this may have been the pattern of travel in 1970 when the program was conceived, it is becoming much less the case today. As shown in Table 14, most vacationers spend less than one week on vacations to Northeast Minnesota and a significant proportion of today's vacations are just a day or two in length. Clearly, these "weekend" vacations offer little opportunity for side trips no matter how enticing the attraction.

*See the introductory sections of "Iron Range Interpretative Program--A Report to the Legislature Prepared for: The Minnesota Department of Economic Development" by Aguar, Jyring, Whiteman, Moser, Inc., April 1971.

Table 14. Changes in Lengths of Stay for Vacations to Minnesota 1978 and 1968 (Percent)

<u>Length of Stay on Minnesota Vacation</u>	<u>Description of Length of Stay</u>	<u>Percent of All Vacations</u>	
		<u>1978</u>	<u>1968</u>
1 - 2 Days	"Week End"	16%	6%
3 - 5 Days	"Less than a Week"	48	41
6 - 8 Days	"About a Week"	19	25
9 - 11 Days	"About 10 Days"	7	12
12 - 14 Days	"About 2 Weeks"	6	12
15 or More Days	"More than 2 Weeks"	<u>4</u>	<u>4</u>
		100%	100%

The *second* requirement is that these pass-through motorists must perceive the attractions of the Range as appealing and complementary to their main vacation interests. In this regard, most vacationers bound for the BWCA or Voyageurs National Park are probably not sufficiently attracted to the more passive, indoor attractions of the Iron Range Interpretative Program.

Further illumination on this point can be seen in the experiences of other historical parks and attractions. As reported in the *Wall Street Journal* (June 27, 1980), there has been a nationwide decline in attendance at historical attractions. The 15 major historical restoration sites along the Eastern Seaboard have experienced collectively a decline in attendance of 5.4 percent during the first four months of 1980, with annual attendance down 17 percent since 1976. This is a reversal of a long-term growth trend lasting to 1978. No facilities appear immune; even Williamsburg, Virginia, is experiencing severe attendance problems.

Many explanations for these trends are possible, but basically it appears that the attractions no longer are as interesting to vacationers as they were during the Bi-Centennial period. The trend may change, but at present it is clearly downward. In the survey for this study, historical sites, tours and cultural events do not rank high as factors attracting people to vacation spots in 1980.

The *third* requirement for successfully attracting pass-through motorists to the Range is that these vacationers have information on Range attractions at the time when vacation plans are being made. As Table 15 indicates, about one-half of the vacationers to Minnesota plan more than 90 percent of their vacation activities ahead of time. To the extent that parties are not informed before their departure about things to see on the way, they are less likely to make unplanned, impulse stops at pass-through sites. While the Iron Range Interpretative Program has done a good job of making this information available inside the Range, there has been little effort made to reach those potential visitors in their homes at the time when vacation plans are being made.

Table 15. Proportion of Activities Planned in Advance
of Vacation Trips in Minnesota

<u>Proportion of Activities Planned on Each Trip</u>	<u>Percent of All Trips For All Respondents</u>
Nearly All, Over 90%	49.2%
About 70%	11.9
About Half, About 50%	7.0
About 30%	4.5
Hardly Any, Less than 10%	27.4
	<u>100.0%</u>

The advantage of building a tourism program on pass-through traffic, in theory, is that it permits the area to enjoy the economic benefits of tourism without having to build the infrastructure of public and private attractions and support services necessary to attract vacationers directly to the area as a destination spot. The experience of the Iron Range Interpretative Program, however, suggests that no real economic benefits are derived from visitors to the Range unless they can be convinced to stay a day or two in the area and to spend money for food, lodging and other service needs.

Gaps in Support Service Availability

While public attention has been given to the economic consequences of tourism on Iron Range economic development, there has been too little attention given to the economic development *requirements* of tourism.

As a practical matter, the capacity of the Iron Range to attract and hold tourists is as much a factor of lodging, restaurants and commercial services as it is of tourist attractions or activities. This suggests that the development of these support services must parallel or even precede the development of new tourist attractions.

Lodging capacity during the summer tourist months has become a major problem throughout Northern Minnesota. Because of the relatively short Minnesota tourist season, hotels, motels and camping sites have been unable to meet peak season vacationer demands satisfactorily. In the Virginia/Hibbing area the problem is made more difficult by the high business traffic associated with the eight taconite operations in the area. According to the managers of the two major motels on this part of the Range (the Eveleth Holiday Inn and the Hibbing Kahler Motor Inn), area motels have been forced during the summer tourist season to turn away most of the weekday tourist traffic. Being turned away, this traffic must seek out other local accommodations or more likely move on to International Falls, Duluth, Grant Rapids, or Ely.

Another aspect of the same issue is that many vacationers set their travel itinerary based on the locations of camping sites or unique lodging accommodations. In these cases, the lodging is the primary tourist attraction. At the present time, the core Range area is without a major campsite or resort area. The closest State Park campground area is McCarthy Beach located 20 miles northwest of Hibbing.* Both Hibbing and Virginia have announced plans to develop a limited number of "temporary campsite pads." Much larger and more permanent facilities are needed to make the Iron Range more appealing to Minnesota campers.

The Hibbing area, in particular, is experiencing a significant growth in commercial establishments. In the past two years, two major shopping malls have been opened, offering an expanded range of retail goods and services. There is also speculation that as many as five or six new restaurants may be built in the Hibbing area. At the same time, however, the city has rejected plans for a new Holiday Inn motel that would have located within the city. Without judging the merits of this proposal, it is important that economic development plans be laid against the tourist development needs of the Region.

The support service problem is a classic "chicken and egg" situation. Without adequate support services, tourism cannot develop. Without development of a tourism base these support services may not be economically justifiable. The problem requires the attention and coordination of a regional agency such as the IRRRB.

Lack of Community Support and Patronage

For tourism to succeed on the Iron Range, it will require stronger and more active support of community leaders and the general public. No matter how strong the attractions or promotional programs, if the local communities are not supporters of tourism development on the Range, the program will not succeed.

Community support involves a number of important activities. As friends, relatives and associates of potential vacationers from outside the Range, community residents are potentially the best promoters of tourism on the Range. As community leaders and private business people, residents can translate tourism support service needs into new development projects. Finally, as vacationers in their own right, Iron Range residents can actively patronize the attractions and support services available in their area.

Over the course of this project, the study team met with a number of community leaders in the Hibbing/Virginia area important to tourism development. These individuals included executives from local Chambers of Commerce, managers of the largest Iron Range motels, and other area promoters and developers. It was apparent from these meetings that even among Iron Range boosters there is

*Even McCarthy Beach has experienced capacity problems. A State Park Users Survey conducted in 1974 by the Minnesota Department of Natural Resources indicated that the McCarthy Park camping area was one of the most heavily used campgrounds in the State. Crowding in the park this year has also been reported by the DNR.

general skepticism about tourism development on the Range. These individuals are concerned about the lack of lakes, the lack of participatory attractions, and the lack of tourist accommodations. Without the active support of this group of community leaders it is highly unlikely that any major base of community support or patronage will emerge in these communities.

Another aspect to the problem of community support is the issue of regional scale planning and development. Given the lack of one individual attraction capable of drawing tourists to the Iron Range, it is necessary to build the Iron Range tourism program around a mix of attractions scattered over a relatively large geographic area. It is not sufficient to promote the "attractions of Virginia" or the "attractions of Hibbing." Tourism must be planned, developed and promoted at a regional scale encompassing a number of cities in the heart of the Iron Range.

The issue of municipal cooperation in regional tourism planning, development and promotion was described as a major problem by a number of people interviewed on the Range. Cities on the Range have a history of being very competitive. Efforts to combine health and other public services seem continually to be thwarted by local interests. Some limited cooperation has occurred such as in the combined Virginia/Eveleth Chambers of Commerce, but there is little interest indicated in jointly promoting Virginia and Hibbing tourist attractions.

The lack of strong, vocal community support for tourism on the Iron Range may well be the most difficult of all problems to overcome. Community support and patronage cannot be mandated. They will occur when, and only when, residents come to believe that support for tourism is in their own best interests. This motivation is what keeps tourist areas like Brainerd going strong. The starting point for the IRRRB should be to forge a sense of community ownership in the various programs supported by IRRRB funds and to expand the role of communities in planning and promoting tourism on the Range.

Uncoordinated Promotion

Tourism promotion by the Interpretative Program, local chambers of commerce and other service organizations on the Iron Range has emphasized individual attractions--such as the Iron Range Interpretative Center, or the Hibbing Bus Tours, or the U.S. Hockey Hall of Fame--as opposed to promoting "Iron Range Tourism." The distinction is an important one, particularly with the Iron Range not gaining a great deal from state and regional promotions emphasizing "Lakes--and a Whole Lot More." This broadly based promotion is important in establishing an identifiable and credible image for the Iron Range in the eyes of prospective vacationers.

At the same time, promotion by the IRRRB has not been matched to vacationer preferences. As shown in Table 16, history and cultural activities rank low in comparison with other attractions that the IRRRB could promote, including beautiful

scenery, returning to see the area (57 percent of vacationers to Minnesota have been there before), visiting the area for the first time, ethnic celebrations, etc.

The final issue relates to the fact that promotion timing and selection have not been matched to that of vacation planning. Most promotion of the Interpretative Center or Iron Range area occurs during the months when vacations are being taken (June through August) rather than when summer vacation plans are made (January and February).

Table 16. Factors Important to Vacationing Families in Selection of a Vacation Destination in 1980 (Ranked by Market Size)

<u>Factor</u>	<u>Very Strongly Attracted (percent)</u>	<u>Interest Rating¹</u>
1. Friends/Relative Meeting/Reunion	58.0	1.894 (2)**
2. Beautiful Scenery	54.5	1.700 (1)
3. Been There Before	44.1	2.026 (3)
4. Good Fishing	41.5	2.629 (5)
5. Never Been There Before	28.1	2.462 (4)
6. Camping	23.5	3.214 (14)
7. Fall Colors	23.9	2.676 (6)
8. National Parks	20.7	2.713 (7)
9. State Parks	19.0	2.735 (8)
* 10. Historic Sites/Tours	16.6	2.851 (9)
11. Summer Sports	16.4	3.065 (11)
12. Resorts	16.2	3.228 (13)
* 13. Festivals/Special Events	15.2	2.987 (10)
14. Shopping	13.5	3.176 (12)
* 15. Nature Study (Birdwatching, etc.)	11.2	3.446 (16)
16. Improve Skills for Old Activities (Skiing, Tennis, Canoeing, etc.)	8.5	3.821 (18)
* 17. Cultural Activities	7.0	3.225 (15)
18. Learning Skills for New Activities (Skiing, Tennis, Canoeing, etc.)	6.0	3.889 (19)
19. Organized/Packaged Activities	5.6	3.895 (20)
20. Sports Events	5.5	3.794 (17)

¹Average from a scale: 1 = Very Strong Attraction to 5 - Would Not Go At All.
Standard error is usually .05.

*Attractions promoted by IRIP promotional efforts.

**Ranked by interest rating.

IV. A STRATEGY FOR IMPROVING IRON RANGE TOURISM DEVELOPMENT

The preceding section describes the problems the Iron Range and the IRRRB will have to contend with in establishing a viable tourism industry on the Range. From this discussion it is clear that continued development of the program along its current lines would be unproductive and would yield no real change from what currently exists. In many respects the tourism development program is no further along than it was in August 1977 when the Iron Range Interpretative Center was first opened to the public. It is our judgment that the Iron Range Interpretative Program as it is currently structured has little, if any, chance of succeeding in its tourism development efforts and that the program may already be reaching its peak attendance levels.

Given this conclusion, the IRRRB is faced with a difficult set of policy choices:

1. Divest itself of the program or at least its tourism components, or
2. Continue a curtailed interpretative program while accepting the fact that it will require continued public subsidy, or
3. Maintain its full commitment to the program and accept what changes are necessary to make the program work.

Each of these choices has its merits; our recommendation is that the IRRRB continue its strong commitment to the interpretative program, at the same time establishing a detailed strategy and tighter controls in all future planning and development activities. In many respects the problems associated with the program to date have been caused not by mismanagement but by misinformation. Thus, the program has not been given a fair opportunity to prove itself.

To counter the many problems associated with the program it is also important to recognize its favorable aspects. Our survey has shown that of the 670,000 families and households that visit Minnesota in one year, nearly half vacation in the Northeast Region of the state. The Iron Range is located in the heart of this area. The Iron Range Interpretative Center, while likely to require continued subsidy, has been very successful as measured by visitor attitudes and in relation to other state interpretative facilities. Thirty percent of the vacationers to Northeast Minnesota have been to see the Center. Beyond these facts, the Iron Range has a unique blend of natural and man-made scenic beauty, a rich blend of history and ethnic heritage, and a substantial resident population. In a region of the state where many of the accommodations and resources for tourist use are showing signs of deterioration, a new program with new attractions can be appealing. A final strength relates to the unique development funds and leadership potential that exist in the IRRRB. Because

of the nature of these funds, the IRRRB can plan within a much longer time horizon--a critical factor in effective tourism planning and development.

In this section a strategy is developed for refocusing tourism development on the Range and for neutralizing those key problems under the control of the IRRRB.

First Step in the Strategy: Accept the Realities of Tourism Development on the Range

An effective strategy for developing tourism on the Range must be structured around a set of supportable assumptions reflecting the realities of both the tourism market and the available development resources. The following are the realities of tourism development on the Iron Range:

1. The Range Area must be perceived and accepted as a destination area. This requires the development over time of these attributes.
 - * The Iron Range must be seen by vacationers to Minnesota as an identifiable, compact and accessible area offering an appealing mix of attractions and support services.
 - * In developing an identifiable, compact and accessible area, the IRRRB must narrow the geographic focus of its tourism development efforts.
 - * In establishing the necessary mix of attractions and support services in this defined subregion, the IRRRB must foster increased community and business support, participation and investment.
2. Vacationers must be well informed about the Range area and its attractions.
 - * To convince potential vacationers that the Iron Range is a viable destination spot, the IRRRB must coordinate its promotion efforts on a subregional program-wide basis and direct the promotion to productive tourist markets (i.e., the Twin Cities, Chicago, and Duluth).
 - * To be effective in reaching potential Iron Range vacationers and influencing their vacation decisions, the promotion must be segmented, timely and concentrated.
 - * The need for planned and concentrated promotion requires the leadership of the IRRRB in coordinating and pooling local, regional and state promotional efforts and resources.

3. IRRRB policies and actions regarding tourism development need a consistent and long term direction.

- * The development of a viable tourism base on the Range will continue to be problematical and will require years of continuing strong financial and planning support by the IRRRB.
- * To ensure that the agency's resources continue to be accessible, the IRRRB must establish the feasibility and compatibility of each project it is asked to fund before committing funds to that project. It must also seek out ways to hold down burdensome operating costs and to optimize the use of existing facilities.
- * To ensure that all policy decisions are based on accurate information, the IRRRB must develop and maintain a strong tourism and economic development data base.

Strategies for Long Range Tourism Development
in the IRRRB Service Area

Many sections of the IRRRB service area have already developed sophisticated and attractive tourism service and industries. These areas should not be the focus of IRRRB activities unless it decides to cut back on the Interpretative Program. What are suggested below are seven strategies/actions for the IRRRB to implement over the next several months and years to achieve the desired goal of establishing the core range area as a destination site.

1. Focus the IRRRB Tourism Development Effort on the Hibbing, Virginia, Hoyt Lakes Area. The issue of geographic scale is of critical importance in establishing the Range as a vacation destination spot. The vacationer must perceive the Range as a discrete area with identifiable boundaries, not too large to require excessive driving or shifts in lodging or campsites and not too small to give the impression of having limited attractions and support amenities.

The tourism development needs of the Iron Range Interpretative Program would be served more productively by channeling the program's planning and development resources into a more limited area, an area no more than 50 miles in length, with the potential for clustering an appropriate mix of tourism attractions and commercial support services. Given these criteria, the most appropriate area for emphasis would be the core area of the Iron Range, running from just west of Hibbing to just east of Hoyt Lakes. To ensure an opportunity for establishing a strong mix of attractions within the area, it is recommended that the area also encompass the strong recreational resources at McCarthy Beach State Park, 20 miles north of Hibbing, and the Whiteface Reservoir, 20 miles

south of Aurora. The proposed tourism development area boundaries are shown in Figure 5.

A Hibbing, Virginia, Hoyt Lakes development region would have a number of advantages over the full IRRRB Region or any other subregional area on the Range:

- The Hibbing, Virginia, Chisholm and Eveleth area is what most visitors already know as "the Iron Range."
- The area encompasses both the Rouchleau and Hull-Rust mines and is the home of much of Minnesota's taconite industry.
- It has a substantial and growing population base, estimated in 1977 at 74,467 persons (see Appendix B, Table 1). Since 26 percent of Northeast Region vacations involve trips to visit family and friends, the existence of a strong resident population will be important to tourism development and promotion.
- The area has the advantage of good north-south highway access via U.S. Highway 53 and east-west access via U.S. Highway 169. It is also served by a major commercial airport located between Hibbing and Eveleth along Minnesota Highway 37.
- The area contains the main Iron Range Interpretative Center complex, five of the twelve Interpretative Program affiliated sites and six of the eight cooperating programs. Combined, these projects represent an investment in planning and development of nearly \$7.0 million or 88 percent of the \$7.8 million in Interpretative Program project development expenditures over the past ten years.
- As shown in Tables 2 and 3 of Appendix B, the Hibbing, Virginia, Hoyt Lakes region contains 32 hotels/motels with more than 800 available rooms (546 units are part of a major chain and/or have been approved by AAA). This Region also contains 295 approved campsites (103 private and municipal, 84 in McCarthy Beach State Park, and 108 Minnesota State Forest sites).
- Opportunities to develop and promote new recreational uses also exist in this region. Table 4 of Appendix B presents information about public access sites (37 within the Region), cross country and downhill skiing, snowmobile routes, golf courses and canoeing access to the St. Louis River.
- Because of the compact nature of this region, visitors could find lodging and support services in any one of four core cities (Hibbing, Virginia, Eveleth and Chisholm) and enjoy any of a number of attractions located within the region.

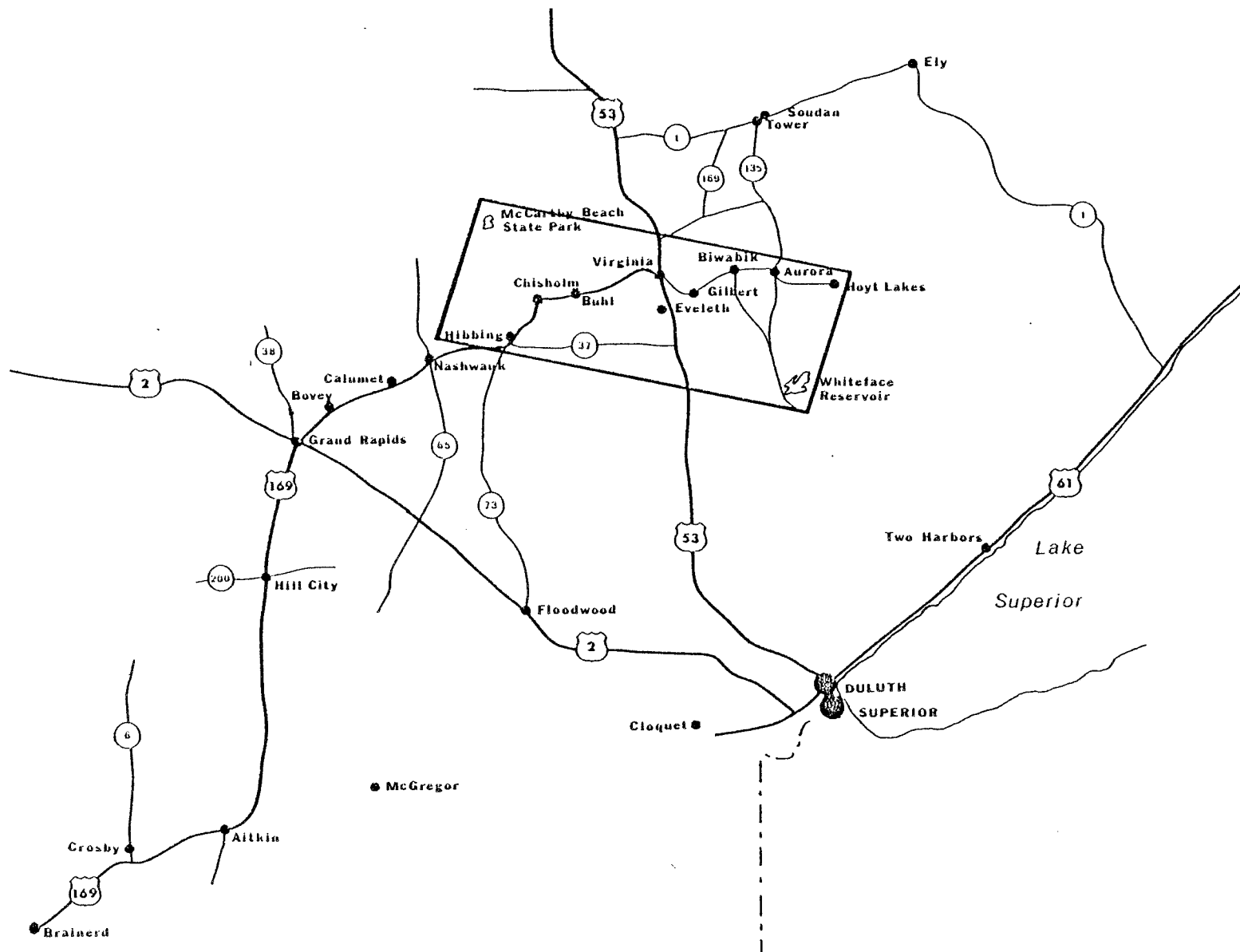


Figure 5. Boundaries of the Proposed Hibbing, Virginia, Hoyt Lakes Tourism Development Region

- The most compelling economic development argument for focusing IRRRB resources within this region is the fact that it is this area that has been most dependent upon mining and taconite production. Areas like Ely and Grand Rapids have more diversified economies and relatively strong tourism industries.

From a planning and development perspective, the Hibbing, Virginia, Hoyt Lakes Region has other virtues. Unlike the IRRRB Region as a whole, this smaller region is relatively homogeneous. Regional planning and promotion are possible within this area, whereas they may not be for the larger, more diverse IRRRB Region. While the communities in the Hibbing and Virginia area have a history of competitiveness, it is our judgment that, with IRRRB leadership, major advances in regional coordination can be accomplished. The success at drawing these communities together in support of the operation of the Anchor Lakes Information Center is a good case in point. Tourism development could be an ideal vehicle for achieving needed regional coordination on the Range.

2. Establish a Tourism Planning and Development Advisory Committee Representing the Hibbing, Virginia, Hoyt Lakes Region. The establishment of a regional tourism advisory committee is a necessary first step in cementing the concept of regional tourism development. In selecting an 8- to 10-member committee, the IRRRB should seek out individuals with regional development interests. These should also be individuals with influence and credibility in their respective communities.

In order to gain the active participation of these kinds of individuals, the committee cannot be sold as a traditional advisory committee or chamber of commerce task force. The committee should get public recognition as a group being given the responsibility of overseeing the planning and development of a regional tourism program and being organized to help leverage community and private sector support, participation and matching investment.

The group could give special attention to planning annual, regional tourism events and promoting new development by the private sector of restaurants, lodging, specialty shops and related support services. The development of major new camping facilities in the Hibbing/Virginia area could be promoted effectively through such a committee.

A tourism development program on the Range will not succeed without the support, patronage and investment of the individual Iron Range communities and businesses. An Iron Range regional tourism advisory committee could perform a strong liaison role between the IRRRB and the area communities and businesses.

3. Plan and Support a Major Annual Iron Range Summer Festival or Activity. The Ethnic Week program last August at the Iron Range Interpretative Center demonstrated the attractiveness of an ethnic festival on the Range by drawing nearly 50,000 people to the Center over a one-week period. A survey conducted at the Center that week showed very high public interest in the program. Half

of those attending came from outside of the Range (principally from Duluth and the Twin Cities).

A list of 1980 summer festivals is provided in Appendix C to this report. A brief review of this list reveals that summer festivals have become very popular in all of the state's major tourism areas. Grant Rapids and Brainerd offer a different event nearly every weekend throughout the summer. The only festival in the Hibbing-Virginia area reported on this State Tourism Bureau list is Virginia's "Land of the Loon Ethnic Arts and Crafts Festival." The scheduled ten-day Minnesota Ethnic days festival at the Interpretative Center is not reported.

The strategy we recommend is to establish a major *regional* event to be offered annually on the Range. The regional advisory committee could play an instrumental role in planning and developing this event, with the IRRRB providing the necessary backing until the event becomes self-supporting (probably a minimum of 3 to 5 years).

The location of the regional event will be key to the support and participation of area residents and communities. For this reason, it should be in a neutral location, not affiliated with any other community site or program. It will also require a large open area (preferably a level field) with space for parking, temporary lodging, food and other support services. If conducted over a period of five or six weekends, the event could draw substantial summer crowds and steer tourists to other compatible attractions on the Range. Estimates of market potential should be developed through a market survey conducted as the event takes shape.

One possible location for such an event is a site between Hibbing and Eveleth off Highway 37. This area offers level and probably leasable land as well as good highway and air access from Iron Range cities, Duluth and the Twin Cities. The theme could relate to ethnic arts and traditions and could change slightly from one week to another increasing the interest of, and repeated visits by, area residents. A feasibility and planning study should be commissioned before proceeding to develop any one major event to any extent. Once again, a regional tourism advisory committee could be very helpful in the development process. The investment of IRRRB funds in project start-up should be channeled through such an advisory committee.

4. Support Private Tourism and Commercial Development Efforts Within the Hibbing, Virginia, Hoyt Lakes Area. For many tourists, high-quality lodging places, clean and scenic campsites, and appealing shopping areas are as much an attraction as any recreational or historical site. The development of the Hibbing, Virginia, Hoyt Lakes area as a vacation destination area requires not only that these support facilities exist but also that they have sufficient capacity to absorb peak season traffic. Without this capacity, tourists will not stay overnight in the region, and most of the potential economic impact will be lost to other areas.

The high quality camping sites in the area are along the periphery of the Hibbing, Virginia, Hoyt Lakes region, roughly 20 to 30 miles from the core city area. Many of the camping sites in the area--like McCarthy Beach State Park, north of Hibbing--have been subject to excessive use and overcrowding. Since nearly 15 percent of the tourists to the state and 18 percent of the tourists to Northeastern Minnesota have spent their vacations camping in Minnesota, it will be important to expand the existing camping base with additional large, permanent camping areas as close to the core area and its attractions as is feasible. In addition to the few small resorts in the Side Lake, Sturgeon Lake, and Whiteface Reservoir areas, there are few resort accommodations--and certainly no first-class resorts--in the development area. The lack of any large lake chains works against the development of a large resort near the core area. Some potential may exist for development of major resort accommodations at Whiteface Reservoir,* south of Aurora.

At present, the development region has over 800 hotel/motel units. Of this total, 546 units are associated with a national chain and/or have been approved by AAA. Under most situations this volume would be substantial enough to meet tourist needs. The high level of business traffic in the Mesabi Range area, however, has meant that very few of these 546 units are actually available to weekday tourist traffic. Development of additional high quality accommodations convenient to Highways 53 and 169 should be given attention by the IRRRB working through its regional tourism advisory committee.

The IRRRB, in supporting this kind of development, should see its primary role as helping to leverage private investment. Financial support should be directed toward feasible private development projects that would not otherwise occur, or would be substantially delayed, without IRRRB involvement. The primary criterion for involvement in commercial development should be that such development will be instrumental to continued tourism and economic development in the area. Since community and private sector support and cooperation will be essential, the tourism advisory committee's role in this process will be important to the program's ultimate success.

To focus more specifically on promoting core area development of lodging, camping and resort facilities, the IRRRB should explore the potential of other business development tools. Among those that could be considered would be:

- Revolving Development Funds - a revolving loan program administered through area communities. The regional advisory committee could have oversight responsibilities. The IRRRB should provide regional coordination.
- Lease-Purchase Arrangements - leasing equipment and facilities to a private developer with the potential to own them outright. This tool has been used by the IRRRB in industrial development situations.

*The feasibility of developing the Whiteface Reservoir area was recently studied by the University of Minnesota-Duluth Campus as part of a study entitled *Survey of Recreational Use on Five Minnesota Power & Light Company Reservoirs--St. Louis River System, Minnesota*, dated January 1979.

- Land Banking - sufficiently large parcels of land could be assembled by the IRRRB, probably working through area communities, for resale to a private developer at or below market prices.
- Commercial Reinvestment - low cost loans or other incentives could be provided for the purpose of rehabilitating or expanding existing commercial facilities.

5. Give Emphasis to Improving the Efficiency and Effectiveness of the Iron Range Interpretative Center Program. The Center's current appeal to limited segments of the tourist market must be expanded to become a successful tourism attraction.

Since its opening in August of 1977, the Iron Range Interpretative Center has drawn nearly 215,000 visitors. Our survey indicates that 30 percent of the vacationing parties to the Iron Range had previously visited the Interpretative Center. This level of patronage is very high in comparison with other Minnesota historical and interpretative sites.

At the same time, it is becoming clear that the Interpretative Center will be unable to increase its attendance much beyond the current level of 70,000 to 100,000 visitors a year without major changes in the program. Even with adoption of the changes proposed in this report, the Center may not achieve the quarter million attendance level it was built to accommodate. At this point a more realistic five year target would be in the neighborhood of 150,000 visitors annually.

The IRRRB must face the fact that the Interpretative Center may never be financially self-supporting. The IRRRB should look for opportunities to increase the productivity of the facility and its appeal to Iron Range vacationers.

- The Center should further reduce staff and operating hours during the off-season months. They should also explore the potential use of volunteer staff to handle seasonal peaks.
- The IRRRB should study the feasibility of contracting out the concession area of the Center and perhaps even full operations of the Center.
- The IRRRB should explore ways to improve the productive use of the facility, such as making space available to compatible community uses. The proposal to shift IRRRB and Interpretative Program staff offices to the second floor of the Research Center would be consistent with this recommendation.
- The Interpretative Program staff should work towards development of a program of changing exhibits at the Center to increase the appeal of the facility to repeat visitors and to extend the seasonal appeal of the Center into the fall months.

- The IRRRB should begin an on-going monitoring program to help establish the potential for increased admission charges; the level of program acceptance and repeat visitorship; the travel behavior, interests and expenditures of visitors; and the value of the Center to the regional tourism development effort.
- The IRRRB should avoid any further facility development at this site, except perhaps camping sites or trails, unless the development can be justified as economically self-supporting. If new development does occur, it should be participatory in character and designed to accommodate other potential uses. It is our judgment that a conference center is not feasible at this site, at least not until a suitable base of private support services are in place in the vicinity of the Center.

6. Establish Uniform Criteria for the Financial Support of Affiliated or Cooperating Sites. To hold down operating costs associated with proposed Interpretative Program affiliated and cooperating sites, the IRRRB should establish a uniform set of funding criteria that will give emphasis to financing economically self-supporting projects. Proposed projects being considered for funding should be studied for feasibility, and revenue-cost estimates should be projected over a five-year period. Projects that will not become self-supporting within this five-year period should not be granted IRRRB funding. This criterion should apply to currently funded projects as well as proposed projects. The need to establish hard economic controls on IRRRB tourism development funding is critical to any future efforts to free up operating funds for expanded regional tourism promotion.

7. Structure Promotion Around a Coordinated Market and Advertising Plan. Along with a coordinated program and facility development effort, the key to development of the Hibbing, Virginia, Hoyt Lakes region as a vacation destination area will be an expanded tourism promotional campaign.

In addition to a greater concentration of funding resources in the promotional area, the IRRRB must take a leadership role in organizing and pooling the collective promotional resources available within the area and the region. This coordinated approach is critical to overcoming budgetary limitations. At the same time it is essential to developing a unified image of the Hibbing, Virginia, Hoyt Lakes area as a credible, organized vacation destination area.

The greatest potential promotional resources on the Range are the Iron Range residents themselves. If the residents of the Range are convinced of the area's tourism attractions, they will communicate this information to friends and relatives outside the Range. It is important, therefore, that this promotional market not be overlooked. Information stands and kiosks also serve the needs of vacationers with unplanned itineraries. To optimize the Iron Range market, the IRRRB should:

- Continue to support the Anchor Lakes Tourist Information Center near Eveleth.
- Expand the kiosk program to incorporate information on all major Hibbing, Virginia, Hoyt Lakes area tourist attractions, lodging/campground sites, recreational programs, festivals/events, and support services. These kiosks should be concentrated at all high traffic locations (e.g., the Kahler Motel and Holiday Inn), primary tourism attractions (e.g., the Interpretative Center), and area chambers of commerce.
- Explore the potential for coordinating tours out of major area locations (e.g., the Interpretative Center, area hotels/motels, and chambers of commerce). The Hibbing Bus Tours provide a good model for this type of programming.
- Draw the area residents into contests and programs focusing on Iron Range Tourism. (The activities of the Hibbing Chamber of Commerce Tourism program have proved very effective in establishing community and volunteer support.)

Promotion outside the Iron Range area should focus on key market segments in large population centers. A detailed market and advertising plan will be needed to establish the best mix of promotional and advertising components. Advertisements should be timed to match vacation decision making, i.e., February, March, April and May for summer vacations; and during the fall months for fall vacations. The major market for a Iron Range promotional campaign should be the Twin Cities area because of its location and its population size. The Duluth area is important but will not provide many overnight vacationers. The IRRRB should also tie the program into the state's new Banner Program intended to reach the important Iowa and Illinois markets.

A final factor to consider will be the development of a tourism theme that matches tourist interests. As the survey indicates, vacationers to Minnesota are most drawn to areas of scenic beauty and unique or memorable experiences. In promoting the Hibbing, Virginia, Hoyt Lakes regions the themes could be "land of man-made mountains and canyons" or "the roots of Minnesota's industrial heritage."

The promotional planning effort will be well served by the considerable data available through the data base developed in this study. The development of a strong monitoring function will also be important in on-going future refinements to the plan.

V. MATCH OF PROPOSED NEW PROJECTS TO SUGGESTED IRON RANGE TOURISM DEVELOPMENT STRATEGIES

This final chapter will briefly evaluate several projects currently considered important to Iron Range tourism development. This process of weighing development proposals against a general development strategy is critical to all IRRRB decisions relating to resource allocation and further project planning--i.e., feasibility studies, facility design, site selection, etc.

From the previous section, the seven proposed strategies are:

- Focus tourism development on the Hibbing, Virginia, Hoyt Lakes Region.
- Establish a tourism planning and development advisory committee representing the Hibbing, Virginia, Hoyt Lakes Region.
- Plan and support a major annual Iron Range summer festival or event.
- Support private sector tourism and commercial development efforts within the Hibbing, Virginia, Hoyt Lakes Region.
- Give emphasis to improving the efficiency and effectiveness of the Iron Range Interpretative Center Program in attracting new or expanded tourism markets.
- Establish uniform criteria for the financial support of affiliated interpretative facilities and projects.
- Structure promotion around a coordinated market and advertising plan.

These strategies must operate within the realities and objectives of Iron Range tourism development. All future efforts should be directed towards: 1) creating acceptance of the Iron Range area as a destination site by vacationers to Minnesota, 2) informing vacationers about the Range Area and its attractions, and 3) providing long-term guidance for Iron Range tourism and economic development.

Proposed Projects

This section examines eight projects currently being considered by the IRRRB and three potential projects suggested by the authors. These projects

are listed in Table 17. The selection of these projects was intended to reflect a broad range of project choices and situations, and should facilitate similar assessments of other proposed projects by the IRRRB. The assessment process is best used as a screening tool prior to allocating IRRRB research, development or promotional resources.

Proposed Screening Criteria

The tourism development objectives and strategies have been translated into six key questions and concerns which should be addressed before any project is given further planning and development consideration. These are:

- Question 1: Does the project fall within the identified Iron Range tourism development area (i.e., the Hibbing, Virginia, Hoyt Lakes Region)?
- Question 2: Does the project expand the development area's tourism support services or infra-structure and strengthen the Range as a destination spot?
- Question 3: Does the project help focus vacationer attention on the Iron Range tourism development area?
- Question 4: Does the project create significant opportunities to attract major new vacationer segments into the Range's tourism development area?
- Question 5: Does the project effectively encourage private sector and community support, patronage and investment in the area?
- Question 6: Is the project likely to have a long-term impact (and support the IRRRB's long-term objectives) in stimulating tourism and economic development in the Iron Range Region?

Application of Screening Criteria

In applying these screening criteria to the 11 projects listed in Table 17, the authors have evolved three categories of projects--those that should be supported by the IRRRB, projects requiring more in-depth study, and projects which should be de-emphasized, discarded or turned over to others. Table 18 shows the authors' assessment of how each project fits the six screening criteria. Not all criteria apply to each project; but the screening process can provide a strong "yes" or "no" indication of whether the IRRRB and the Iron Range Interpretative Program should undertake or continue project support.

Table 17. Potential Tourism Development Projects
Available to the IRRRB

1. Proposed Improvements to the Glen Mine Complex near Chisholm
 - * Refinements to the existing Iron Range Interpretative Center (including rotating exhibits, craft and food service concessions)
 - * Convention Center facility
 - * High quality camping sites
 - * Extensive hiking trails into the Glen Mine
 - * A tramway system spanning the Glen Mine area.
2. Restoration of the Bruce Headframe near Chisholm.
3. Restoration of the Oldtown-Finntown neighborhood in Virginia.
4. Expansion of the Ethnic Days event to the status of an annual region-wide festival.
5. Expansion of recreation and camping attractions in the Grant's Ridge area near Biwabik.
6. Full-scale development of the Hill-Annex Mine Interpretive Park.
7. Continued development of the Iron Range Country program.
8. Restoration of the Pioneer Mine Interpretive area in Ely.
9. Development of a cooperative advertising program patterned after the state's Banner Program.
10. Establishment of a Regional Tourism Planning and Development Advisory Committee.
11. Development of a Long-Range Marketing and Development Plan for the Hibbing, Virginia, Hoyt Lakes tourism development region.

Table 18. Projects Judged by Key Screening Criteria

Projects	Criteria						Overall Judgment
	1. Is Project in the Core Range Area?	2. Does it Expand Services/Infrastructure?	3. Does it Focus Vacationer Attention?	4. Will it Attract New Vacationer Segments?	5. Will it Encourage Private/Community Action?	6. Is it Likely to Have Long-term Impacts?	
1. Glen Mine Site Improvement - Interpretative Center	Yes	*	Yes	Yes	Not Presently	Yes	Add New Programs
- Convention Center	Yes	Yes	No	Maybe	Maybe	Yes	Study Feasibility
- Camping	Yes	Yes	Yes	Yes	No But Needed	Yes	Definite Yes
- Trails/Hiking	Yes	Yes	Yes	Yes	NA	Yes	Yes
- Tramway	Yes	Yes	Yes	Yes	Not Likely	Yes	Study Feasibility
2. Bruce Headframe Restoration-Chisholm	Yes	No	No	No	No	No	Definite No
3. Oldtown-Finntown Restoration-Virginia	Yes	Yes	Yes	Maybe	Yes	Yes	Proceed/Closely Monitor
4. Expanded Festival	Yes	Yes	Yes	Yes	Yes	Yes	Definite Yes
5. Recreation/Camping-Giant's Ridge-Biwabik	Yes	Yes	Yes	Yes	Yes	Yes	Proceed
6. Hill-Annex Interpretive Park	No						No
7. Iron Range Country Program	Partially	NA	No	No	No	Possibly	De-Emphasize
8. Pioneer Mine Restoration-Ely	No						No
9. Cooperative Advertising Program	Yes	NA	Yes	Yes	Yes	Yes	Yes
10. Regional Tourism Advisory Committee	Yes	Yes	Yes	Yes	Yes	Yes	Yes
11. Long Range Marketing and Development Plan	Yes	Yes	Yes	Yes	Yes	Yes	Yes

*Facilities already existing and in operation.

Projects to be Taken On. The IRRRB can take some actions immediately to expand tourism in the Hibbing, Virginia, Hoyt Lakes development region. Two do not require any significant new investment by the IRRRB, but do require that the staff take a leadership role in coordinating local actions. The first is developing cooperative advertising similar to the Banner Program being developed by the state, whereby advertising space is purchased by a central group and resold at lower rates to participating local advertisers. The other involves establishing a Regional Tourism Advisory Committee, consisting of broad interests from the Hibbing, Virginia, Hoyt Lakes Region, to stimulate private sector and community support and investment in Iron Range tourism development.

The IRRRB's other development opportunities will require some investment of financial resources and staff time. Major opportunities exist for expanding and diversifying the tourism program at the Glen Mine complex. Specifically, the IRRRB should develop a rotating group of programs and exhibits to attract a broader base of Northeast Minnesota vacationers to the complex and also to stimulate the return of previous visitors to the Center. The development of camping sites and hiking trails in the Glen Mine area should be given priority attention. The new investment areas should proceed with careful monitoring of visitor needs and interests at the Center (see Appendix D).

The expansion and restructuring of the Ethnic Days Festival to an annual region-wide event should also be given high priority by the IRRRB and should proceed in the manner described in the strategy section of this report. In this area, as in all areas of future funding support, the IRRRB should work through its Advisory Committee to ensure maximum regional support and investment in the development of the project. The primary support by the IRRRB should be made in the first three years of the festival or until it becomes financially self-supporting.

Planning tourism marketing and development is an important function that must be given ongoing attention by the IRRRB. The effort should build on existing resources and staff capabilities and should be geared towards serving the planning and development needs of interested private sector investors.

Projects Requiring More In-Depth Study. Projects which promise to expand the tourism attraction of the Hibbing, Virginia, Hoyt Lakes Region should be given continued attention. At the same time, the IRRRB must avoid supporting programs that may become a drain on future tourism development resources. These projects should be developed with a critical eye on program feasibility and should be accompanied by strong private sector commitments for future operational support. Included in this area are the convention center and the tramway at the Glen Mine complex as well as the Oldtown-Finntown Restoration in Virginia and the Giant's Ridge recreation/camping program near Biwabik.

Projects to be De-Emphasized, Discarded or Turned Over to Others. Two projects outside the Hibbing, Virginia, Hoyt Lakes Region should not be supported. These are the Hill-Annex Mine Interpretive Park in Calumet and

the Pioneer Mine Restoration in Ely. In addition, no further investment should be made in the Bruce Headframe Restoration near Chisholm. This project adds little to tourism development in the Region and should not be supported by limited IRRRB tourism development funds.

It is the authors' judgment that the Iron Range Country program should be de-emphasized as a tourism development program on the Range. Its strength is in supporting parallel mining and historical attractions across the breadth of the Iron Range Trail. This clearly runs contrary to the critical need to develop an identifiable vacation destination area on the Range. The program's current efforts to identify and mark historical sites should be continued, but it should not be granted a significant share of the IRRRB's promotional funds.

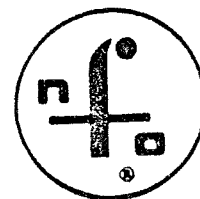
Hard Choices for the IRRRB

The development of a new tourism industry on the Range will require time, patience, resources, careful planning, local entrepreneurial risk taking, and community support and participation. The rewards can be great, but so are the risks. Progress should be monitored on a continuing basis. If, in the end, the ingredients required for tourism do not materialize in the Hibbing, Virginia, Hoyt Lakes Region, the IRRRB may find it more appropriate to invest staff time and resources in other economic development ventures or in other already developed tourism centers within the jurisdiction of the IRRRB. Decisions of this kind are difficult and, for this reason, must be made on the basis of reliable tourism and economic data.

APPENDIX A

The Midwest Vacationer Survey Form

National Family Opinion, Inc.



POST OFFICE BOX 474
TOLEDO, OHIO 43654

01210

Dear NFO Member,

This questionnaire is about VACATION TRIPS taken by your family in 1979, and vacation trips planned or taken in 1980.

On the first page of the questionnaire I have given an example of trips that may have been taken by your family during 1979. Please look at the example carefully, then proceed to complete your own vacation chart for 1979. Then continue on to complete a similar chart for trips that you plan to take or have already taken in 1980.

IMPORTANT: If you took more than four vacations, list the four in which the longest time was spent away.

The rest of the questionnaire asks you more specific questions on up to four of those vacations you may have listed on your vacation chart. Please answer each question carefully by following the directions I have given.

I'm sure you'll find this a very interesting questionnaire to complete.

After all of my questions have been answered, please return the completed questionnaire to me in the postage-paid envelope I have enclosed for your convenience.

Thanking you in advance for your fine cooperation.

Sincerely,

Carol Adams

EXAMPLE

- (1) In December 1979, you and your spouse spent three days, two nights skiing in Wisconsin.
- (2) In July 1979, the family drove to Maine for 10 days, 9 nights to visit relatives and see the historic sights on the way.
- (3) In March 1979, you both travelled to New York City to shop and enjoy the night life.
- (4) In January 1979, you and your spouse flew to Florida for sunshine and a tennis camp for 4 days and nights.
- (5) In 1979 you took 2 overnight trips to Chicago for shopping.

SAMPLE VACATION CHART: JANUARY 1 - DECEMBER 31, 1979

SAMPLE VACATION CHART, JANUARY 1 - DECEMBER 31, 1979												
VACATION	MONTH	YEAR	MAIN DESTINATION STATE(S)	TOTAL NUMBER NIGHTS AWAY	VISIT FAMILY OR FRIENDS	MAIN PURPOSE(S) OF VACATION					WRITE IN	
						OUTDOOR ACTIVITIES	SIGHTSEEING	OTHER				
									SUMMER SEASON	WINTER SEASON		NON- METRO
1st Most Recent	Dec	1979	Wisconsin	+2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Skiing		
2nd Most Recent	Jul	1979	Maine	+9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
3rd Most Recent	Apr	1979	New York	+2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Shopping		
4th Most Recent	Jan	1979	Florida	+4	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tennis		

TOTAL NUMBER OF OVERNIGHT VACATION TRIPS 6

YOUR FAMILY'S VACATION CHART: JANUARY 1, 1979 TO DECEMBER 31, 1979

FOUR FAMILY'S VACATION CHART, JANUARY 1, 1975 TO DECEMBER 31, 1975											
			MAIN PURPOSE(S) OF VACATION								
VACATION	MONTH	YEAR	MAIN DESTINATION STATE(S)	TOTAL NUMBER NIGHTS AWAY	VISIT FAMILY OR FRIENDS	OUTDOOR ACTIVITIES		SIGHTSEEING		OTHER	
						SUMMER SEASON	WINTER SEASON	NON- METRO	METRO		
1st Most Recent	_____	19__	_____	#_____	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	_____	
2nd Most Recent	_____	19__	_____	#_____	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	_____	
3rd Most Recent	_____	19__	_____	#_____	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	_____	
4th Most Recent	_____	19__	_____	#_____	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	_____	

TOTAL NUMBER OF OVERNIGHT VACATION TRIPS TAKEN IN 1979 _____

Similarly we would like information regarding your family's vacation plans for this year (1980).

Your family's planned or taken vacations for January 1 - December 31, 1980.

YOUR FAMILY'S VACATION - PLAN CHART: JANUARY 1 - DECEMBER 31, 1980

					MAIN PURPOSE(S) OF VACATION					
VACATION	MONTH	YEAR	MAIN DESTINATION STATE(S)	TOTAL NUMBER NIGHTS AWAY	VISIT FAMILY OR FRIENDS	OUTDOOR ACTIVITIES		SIGHTSEEING		OTHER
						SUMMER SEASON	WINTER SEASON	NON- METRO	METRO	
1st Most Recent	_____	19__	_____	#__	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	_____
2nd Most Recent	_____	19__	_____	#__	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	_____
3rd Most Recent	_____	19__	_____	#__	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	_____
4th Most Recent	_____	19__	_____	#__	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	_____

TOTAL NUMBER OF OVERNIGHT VACATION TRIPS TAKEN/PLANNED IN 1980 _____

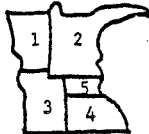
Now that you have listed the vacations which you and other members of your family took in 1979 and those planned in 1980, I would like you to give me (on the following three pages) more detailed information about each of these vacations. Since the answers to some of these questions depend on the attitudes or information of other members of your family, PLEASE TALK WITH THOSE OTHER FAMILY MEMBERS BEFORE ANSWERING, AS THEIR OPINIONS MAY DIFFER FROM YOURS. Thank you.

Each column in this section is headed by a number. These numbers refer to the vacation you listed as MOST RECENT, 2nd MOST RECENT, 3rd MOST RECENT and 4th MOST RECENT on the preceding page in your 1979 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 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.

	MOST RECENT VACATION <u>1</u>	2ND MOST RECENT VACATION <u>2</u>	3RD MOST RECENT VACATION <u>3</u>	4TH MOST RECENT VACATION <u>4</u>
1. Write in the MONTH of each vacation taken in 1979	_____	_____	_____	_____
2. a. Who went on this vacation? (✓ AS MANY AS APPLY)				
Husband	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
Wife	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
Children	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
Other relative	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4
Friends	<input type="checkbox"/> 5	<input type="checkbox"/> 5	<input type="checkbox"/> 5	<input type="checkbox"/> 5
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 DESTINATION STATE?	# _____	# _____	# _____	# _____
b. How many nights were spent in states <u>other than</u> your main destination state(s)?	# _____	# _____	# _____	# _____
c. Please indicate WHAT STATES <u>and</u> NUMBER OF NIGHTS in each of those states	STATE/# NIGHTS _____ _____ _____ _____ _____	STATE/# NIGHTS _____ _____ _____ _____ _____	STATE/# NIGHTS _____ _____ _____ _____ _____	STATE/# NIGHTS _____ _____ _____ _____ _____
4. Approximately how far did you travel on each vacation (please round to nearest 50 miles)?	_____	_____	_____	_____
5. Was this trip part of a commercially organized tour group?				
YES	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
NO	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
6. How many nights and in what types of places were one or more nights spent on each vacation?				
Home of relative or friend	# _____ 1	# _____ 1	# _____ 1	# _____ 1
Motel	# _____ 2	# _____ 2	# _____ 2	# _____ 2
Hotel	# _____ 3	# _____ 3	# _____ 3	# _____ 3
Lodge or resort	# _____ 4	# _____ 4	# _____ 4	# _____ 4
Campsite with tent	# _____ 5	# _____ 5	# _____ 5	# _____ 5
Campsite with trailer or recreational vehicle	# _____ 6	# _____ 6	# _____ 6	# _____ 6
Other (WRITE IN):	# _____	# _____	# _____	# _____
7. Where was information about where to go or what to do obtained for this vacation? (✓ ALL THAT APPLY)				
Had been there before	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
Advice from friend or relative ..	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
Wrote to request information	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
Advertising	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4
News articles	<input type="checkbox"/> 5	<input type="checkbox"/> 5	<input type="checkbox"/> 5	<input type="checkbox"/> 5
AAA or other motor club	<input type="checkbox"/> 6	<input type="checkbox"/> 6	<input type="checkbox"/> 6	<input type="checkbox"/> 6
Sport Shows/Travel Shows	<input type="checkbox"/> 7	<input type="checkbox"/> 7	<input type="checkbox"/> 7	<input type="checkbox"/> 7
Travel Agent	<input type="checkbox"/> 8	<input type="checkbox"/> 8	<input type="checkbox"/> 8	<input type="checkbox"/> 8
Other (WRITE IN)	_____	_____	_____	_____
8. In which month was the decision made on which state(s) to vacation in?	_____	_____	_____	_____

Continuing 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 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.

	MOST RECENT VACATION 1	2ND MOST RECENT VACATION 2	3RD MOST RECENT VACATION 3	4TH MOST RECENT VACATION 4
9. How many times before this vacation had your family, or family members, vacationed in this MAIN DESTINATION STATE?				
NONE	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
Once before	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
Twice before	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
Three to 5 times before	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4
More than 5 times before	<input type="checkbox"/> 5	<input type="checkbox"/> 5	<input type="checkbox"/> 5	<input type="checkbox"/> 5
10. What mode(s) of transportation were used in making this vacation trip? (✓ ALL THAT APPLY AND CIRCLE THE ONE USED TO COVER THE GREATEST DISTANCE)				
Airplane	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
Automobile	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
Bus	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
Recreational vehicle	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4
Other (WRITE IN)				
11. What was the total cost of each vacation? (Including lodging, meals, transportation, entertainment, souvenirs, and other expenses of the vacation)	\$ _____	\$ _____	\$ _____	\$ _____
12. If the main destination state was MINNESOTA, in what parts of the state did you stay? DESTINATION				
(WRITE IN FROM MAP)				
				
REGIONS TRAVELED THROUGH				
(WRITE IN FROM MAP)				
13. What did you do on each vacation? (✓ ALL ACTIVITIES THAT APPLY)				
<u>OUTDOOR/ATHLETIC ACTIVITIES:</u>				
Backpacking	<input type="checkbox"/> 01	<input type="checkbox"/> 01	<input type="checkbox"/> 01	<input type="checkbox"/> 01
Biking	<input type="checkbox"/> 02	<input type="checkbox"/> 02	<input type="checkbox"/> 02	<input type="checkbox"/> 02
Boating	<input type="checkbox"/> 03	<input type="checkbox"/> 03	<input type="checkbox"/> 03	<input type="checkbox"/> 03
Camping	<input type="checkbox"/> 04	<input type="checkbox"/> 04	<input type="checkbox"/> 04	<input type="checkbox"/> 04
Canoeing	<input type="checkbox"/> 05	<input type="checkbox"/> 05	<input type="checkbox"/> 05	<input type="checkbox"/> 05
Cross-Country Skiing	<input type="checkbox"/> 06	<input type="checkbox"/> 06	<input type="checkbox"/> 06	<input type="checkbox"/> 06
Downhill Skiing	<input type="checkbox"/> 07	<input type="checkbox"/> 07	<input type="checkbox"/> 07	<input type="checkbox"/> 07
Fishing	<input type="checkbox"/> 08	<input type="checkbox"/> 08	<input type="checkbox"/> 08	<input type="checkbox"/> 08
Golfing	<input type="checkbox"/> 09	<input type="checkbox"/> 09	<input type="checkbox"/> 09	<input type="checkbox"/> 09
Hiking	<input type="checkbox"/> 10	<input type="checkbox"/> 10	<input type="checkbox"/> 10	<input type="checkbox"/> 10
Hunting	<input type="checkbox"/> 11	<input type="checkbox"/> 11	<input type="checkbox"/> 11	<input type="checkbox"/> 11
Snowmobiling	<input type="checkbox"/> 12	<input type="checkbox"/> 12	<input type="checkbox"/> 12	<input type="checkbox"/> 12
Swimming	<input type="checkbox"/> 13	<input type="checkbox"/> 13	<input type="checkbox"/> 13	<input type="checkbox"/> 13
Tennis	<input type="checkbox"/> 14	<input type="checkbox"/> 14	<input type="checkbox"/> 14	<input type="checkbox"/> 14
Water Skiing	<input type="checkbox"/> 15	<input type="checkbox"/> 15	<input type="checkbox"/> 15	<input type="checkbox"/> 15
Other				
<u>SIGHTSEEING/CULTURAL:</u>				
Concerts	<input type="checkbox"/> 01	<input type="checkbox"/> 01	<input type="checkbox"/> 01	<input type="checkbox"/> 01
Dance/Opera	<input type="checkbox"/> 02	<input type="checkbox"/> 02	<input type="checkbox"/> 02	<input type="checkbox"/> 02
Festivals	<input type="checkbox"/> 03	<input type="checkbox"/> 03	<input type="checkbox"/> 03	<input type="checkbox"/> 03
Fall Colors	<input type="checkbox"/> 04	<input type="checkbox"/> 04	<input type="checkbox"/> 04	<input type="checkbox"/> 04
Genealogy (tracing family roots)	<input type="checkbox"/> 05	<input type="checkbox"/> 05	<input type="checkbox"/> 05	<input type="checkbox"/> 05
Historic Sites Tours	<input type="checkbox"/> 06	<input type="checkbox"/> 06	<input type="checkbox"/> 06	<input type="checkbox"/> 06
Movies	<input type="checkbox"/> 07	<input type="checkbox"/> 07	<input type="checkbox"/> 07	<input type="checkbox"/> 07
Museums	<input type="checkbox"/> 08	<input type="checkbox"/> 08	<input type="checkbox"/> 08	<input type="checkbox"/> 08
National/State Parks	<input type="checkbox"/> 09	<input type="checkbox"/> 09	<input type="checkbox"/> 09	<input type="checkbox"/> 09
Nature Study (rock hunting, bird watching, etc.)	<input type="checkbox"/> 10	<input type="checkbox"/> 10	<input type="checkbox"/> 10	<input type="checkbox"/> 10
Shopping	<input type="checkbox"/> 11	<input type="checkbox"/> 11	<input type="checkbox"/> 11	<input type="checkbox"/> 11
State Fairs	<input type="checkbox"/> 12	<input type="checkbox"/> 12	<input type="checkbox"/> 12	<input type="checkbox"/> 12
Theatre/Plays	<input type="checkbox"/> 13	<input type="checkbox"/> 13	<input type="checkbox"/> 13	<input type="checkbox"/> 13
Zoos	<input type="checkbox"/> 14	<input type="checkbox"/> 14	<input type="checkbox"/> 14	<input type="checkbox"/> 14
Other (WRITE IN)				

Continuing 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 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.

	MOST RECENT VACATION	2ND MOST RECENT VACATION	3RD MOST RECENT VACATION	4TH MOST RECENT VACATION
	1	2	3	4
13. (CONTINUED) What did you do on each vacation? (✓ ALL ACTIVITIES THAT APPLY)				
<u>SPORTING EVENTS:</u>				
Football Game	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
Baseball Game	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
Soccer Game	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
Hockey Game	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4
Basketball Game	<input type="checkbox"/> 5	<input type="checkbox"/> 5	<input type="checkbox"/> 5	<input type="checkbox"/> 5
Other (WRITE IN)				
RELAXED AND DID NOTHING SPECIAL	<input type="checkbox"/> +	<input type="checkbox"/> +	<input type="checkbox"/> +	<input type="checkbox"/> +

14. a. What proportion of these activities did you anticipate or plan for your vacation prior to leaving home?

Nearly all (over 90%)	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
About 3/4 (70%)	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
About half (50%)	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
About 1/3 (30%)	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4	<input type="checkbox"/> 4
Hardly any (under 10%)	<input type="checkbox"/> 5	<input type="checkbox"/> 5	<input type="checkbox"/> 5	<input type="checkbox"/> 5

- b. "✓" the box to indicate which of the above vacations was your family's favorite trip

<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
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15. What areas of Minnesota are you familiar with? Please "✓" a box to indicate whether or not you have been in the area, and then circle a number to indicate how familiar you are with that area.

	HAVE BEEN THERE	NOT BEEN THERE	VERY FAMILIAR WITH	HEARD OF AREA	DO NOT KNOW ANYTHING		
Alexandria	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Bemidji	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Boundary Waters Canoe Area (BWCA)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Brainerd	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Chisholm	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Como Zoo	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Duluth	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Ely	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Eveleth	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Forest History Interpretive Center	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Grand Mound Interpretive Center	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Grand Portage Interpretive Center	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Grand Rapids	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Hibbing	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Hockey Hall Of Fame	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Iron Range Interpretive Center	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Iron Range Area	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Itasca	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Lake Pepin	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Lake Vermillion	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Mankato	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Mesabi Range	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Minnesota Zoo	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Mississippi River	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
North Shore Of Lake Superior	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Pipestone	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Rochester	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Silver Bay	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Twin Cities Area (MPLS - St. Paul)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Tower-Sudan Mine	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Virginia	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Voyageurs National Park	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5
Winona	<input type="checkbox"/> 1	<input type="checkbox"/> 2	1	2	3	4	5

16. How did the following factors influence your vacation behavior in 1979? Circle the number that best describes the effect of each of the factors listed below.

	<u>POSITIVE INCREASED</u>		<u>NO EFFECT</u>	<u>NEGATIVE DECREASED</u>	
Gasoline/Fuel Prices	1	2	3	4	5
Gasoline/Fuel Availability	1	2	3	4	5
Inflation	1	2	3	4	5
Information Availability	1	2	3	4	5
Personal Finances	1	2	3	4	5
Cost Of Food	1	2	3	4	5
Cost Of Lodging	1	2	3	4	5
Other (WRITE IN)	1	2	3	4	5
.....	1	2	3	4	5
.....	1	2	3	4	5

17. What activities/facilities will attract you to a vacation spot in 1980? Circle the number that best describes your feelings on each of the items listed below.

	<u>VERY STRONG ATTRACTION</u>		<u>MODERATE</u>		<u>WOULD NOT GO AT ALL</u>
Availability of:					
Camping	1	2	3	4	5
Resorts	1	2	3	4	5
Beautiful Scenery	1	2	3	4	5
Been There Before	1	2	3	4	5
Cultural Activities	1	2	3	4	5
Fall Colors	1	2	3	4	5
Festivals/Special Events	1	2	3	4	5
Friends and Relatives Reunions/Meetings	1	2	3	4	5
Good Fishing	1	2	3	4	5
Historical Tours/Sites	1	2	3	4	5
Improving Skills For Old Activities (skiing, tennis, canoeing, etc.)	1	2	3	4	5
Learning Skills For New Activities (skiing, tennis, canoeing, etc.)	1	2	3	4	5
National Parks	1	2	3	4	5
Nature Study (rockhunting, bird watching, etc.) .	1	2	3	4	5
Never Been There Before	1	2	3	4	5
Organized/Packaged Activities	1	2	3	4	5
Shopping	1	2	3	4	5
Sports Events	1	2	3	4	5
State Parks	1	2	3	4	5
Summer Sports	1	2	3	4	5
Other (WRITE IN)	1	2	3	4	5
.....	1	2	3	4	5
.....	1	2	3	4	5

APPENDIX B

Characteristics of a Proposed Hibbing, Virginia,
Hoyt Lakes Tourism Development Region

Table B-1. Population Within the Proposed Hibbing,
Virginia, Hoyt Lakes Tourism Region

	<u>1970</u>	<u>1977</u>	<u>Percent Change</u>
Aurora	2,531	2,833	+ 11.9
Biwabik	1,483	1,483	--
Buhl	1,303	1,377	+ 5.7
Chisholm	5,913	6,036	+ 2.1
Evelth	4,776	4,635	- 3.0
Franklin	41	36	- 12.2
Gilbert	2,379	2,750	+ 15.6
Kinney	325	458	+ 40.9
Hibbing	16,104	16,209	+ 0.7
Hoyt Lakes	3,634	3,737	+ 2.8
Iron Junction	150	131	- 12.7
Leonidas	157	161	+ 2.5
McKinley	317	271	- 14.5
Mountain Iron	3,281	3,927	+ 19.7
Virginia	12,465	11,487	- 7.8
Balkan Township	780	1,023	+ 31.2
Cherry Township	593	870	+ 46.7
Clinton Township	874	1,108	+ 26.8
Colvin Township	248	264	+ 6.5
Fayal Township	2,025	2,821	+ 39.3
French Township	183	421	+130.1
Great Scott Township	605	773	+ 27.8
McDavitt Township	426	429	+ 0.7
Stuntz Township	4,640	5,575	+ 20.2
White Township	4,385	4,964	+ 13.2
Wuori Township	<u>474</u>	<u>688</u>	+ 45.1
	70,092	74,467	+ 6.2

SOURCE: U.S. Department of Commerce, Bureau of the Census, "1977 Population Estimates for Counties, Incorporated Places, and Minor Civil Division in Minnesota," *Current Population Reports: Population Estimates and Projection*, Series P-25, No. 836, Issued November 1979.

Table B-2. Lodging Accommodations in Hibbing,
Virginia, and the Hoyt Lakes Region

HIBBING

1. Kahler Motel (126 units)¹
2. Johnston's El Motel (21 units)
3. Avalon Hotel
4. Homer Hotel
5. Majestic Hotel
6. Michael's Motel (16 units)
7. Stover House
8. Star Motel (22 units)
9. Thrifty Scot Motel (100 units)²

CHISHOLM

1. Iron Man Motel (44 units)³
2. Ronson Motel (11 units)

VIRGINIA

1. Holiday Inn Eveleth/Virginia (146 units)²
2. Alpine Motel (15 units)
3. Cloud 9 Motel (14 units)
4. Lakeshore Motor Inn (18 units)³
5. Midway Motel
6. Rico's Voyageur Motor Lodge (18 units)³
7. Ski-View Motel (59 units)¹
8. Starfire Motel (12 units)
9. Virginia Hotel
10. Lakeview Hotel
11. Norman's Hotel
12. Northern Motel (9 units)
13. Royal Hotel
14. Third Avenue Hotel

BIWABIK

1. Biwabik Motel (11 units)

EVELETH

1. Gopher Motel (14 units)
2. Half Moon Lake Resort & Motel--6 miles south of Eveleth
3. Koke's Downtown Motel (14 units)³
4. Slovene Motel (21 units)³

GILBERT

1. Shady Oak Cabins--on Bass Lake

AURORA

1. Forest Gardens Motel (11 units)
2. Holters Motel (18 units)

¹Best Western. ²Major Hotel/Motel Chain. ³AAA Approved.

SOURCES: Northwestern Bell Telephone Company, Telephone Directories, 1979.
Continental Telephone Company of Minnesota, Inc., Telephone
Directory, 1979.

American Hotel Register Company, *Leahy's Hotel Motel Guide and Travel
Atlas of the United States, Canada, Mexico, Puerto Rico*, 104th Edition,
1979.

Table B-3. Public and Private Campsites in the Hibbing,
Virginia, Hoyt Lakes Region, 1979

PRIVATE, MUNICIPAL AND COUNTY CAMPGROUNDS (Total 103 Sites)

1. Chisholm Campground (Chisholm) - 40 sites
2. Elliot Lake Campground (Eveleth) - 15 sites with open area
for an additional 75 units
3. Fishermans' Point (Hoyt Lakes) - 48 sites

MINNESOTA STATE PARK CAMPGROUNDS (Total 84 Sites)

4. McCarthy Beach State Park (20 miles north of Hibbing) -
45 semi-modern and 39 rustic campsites

STATE FOREST CAMPGROUNDS (Total 108 Sites)

5. Whiteface River Campground (17 miles south of Biwabik) -
4 sites
6. Beatrice Lake Campground (25 miles north of Hibbing) -
25 sites
7. Pfeiffer Lake Campground (27 miles north of Virginia) -
21 sites
8. Whiteface Reservoir Campground (15 miles south of Aurora) -
58 sites

SOURCE: Minnesota Department of Economic Development, *Minnesota
Camping Guide*, 1979.

Table B-4. Existing Recreational Sites in Hibbing,
Virginia and the Hoyt Lakes Region

A. CROSS COUNTRY SKI TRAILS

1. Lookout Mountain Ski Trail (3 miles north of Virginia) - 9 miles marked and groomed
2. Olcott Park (Virginia) - 1 mile marked and groomed
3. McCarthy Beach State Park (20 miles north of Hibbing) - 8 miles marked and groomed
4. Carey Lake Recreation Area (5 miles east of Hibbing)
5. Grant's Ridge Recreation Area (4 miles east of Biwabik)

B. DOWNHILL SKI AREAS

1. Grant's Ridge Recreation Area (4 miles east of Biwabik) - 7 runs, longest 3700 feet, vertical drop 440 feet

C. SNOWMOBILE TRAILS

1. Taconite Trail (10 miles north of Keewatin to Highway 53) - 60 miles marked and groomed
2. Laurentian Snowmobile Trail (Grant's Ridge to Birch Nob North Virginia) - 44 miles: 2 wayside rests
3. McCarthy Beach State Park (20 miles north of Hibbing) - 13 miles marked and groomed
4. George Washington State Forest, Tim Corey Trail (20 miles north of Hibbing) - 34 miles marked and groomed

D. CANOE TRAILS

1. St. Louis River (Highway 53 south of Eveleth to Cloquet) - 90 miles

E. GOLF COURSES

1. Eveleth Golf Course (Eveleth) - 9 holes, par 36
2. Eschquagama Club (Gilbert) - 9 holes, par 37
3. Hibbing Municipal Golf Course (Hibbing) - 9 holes, par 34
4. Mesaba Country Club (Hibbing) - 9 holes, par 36
5. Hoyt Lakes Golf Course (Hoyt Lakes) - 9 holes, par 36
6. Virginia Golf Course (Virginia) - 18 holes, par 70

F. PUBLIC WATER ACCESS SITES

Aurora

1. Cedar Lake (2 miles south)*
2. Colby Lake (3 miles east)
3. St. Louis River (8 miles southeast)
4. South Twin Lake (5 miles south)
5. White Face River (15 miles south)
6. Wynne Lake (5 miles northwest)

Biwabik

7. Bass Lake (7 miles south)
8. Embarass Lake (edge of town and 1 mile south) - 2 sites
9. Loon Lake (14 miles southeast)
10. Lost Lake (7 miles south)
11. Mud Hen Lake (15 miles south)
12. North Twin Lake (13 miles southeast)
13. Silver Lake (7 miles south)*

*Lakes managed for trout.

Table B-4. Existing Recreational Sites in Hibbing, Virginia and the Hoyt Lakes Region (Continued)

F. PUBLIC WATER ACCESS SITES (Continued)

Buhl

- 14. Dark Lake (11 miles north)
- 15. Spirit Lake (6 miles southeast)

Chisholm

- 16. Little Sturgeon Lake (14 miles northwest)
- 17. Long Lake (9 miles north)
- 18. McQuade Lake (9 miles southeast)

Eveleth

- 19. Elbow Lake (7 miles southwest)
- 20. Elliot Lake (12 miles south)
- 21. Haenke Lake (6 miles west)
- 22. Murphy Lake (14 miles south)
- 23. St. Louis River (8 miles south)

Gilbert

- 24. Ely Lake (at Sparta townsite)
- 25. Horseshoe Lake (5 miles southeast)
- 26. Lost Lake (7 miles southeast)

Hibbing

- 27. South Sturgeon Lake (15 miles north)
- 28. Gansey Lake (15 miles north)
- 29. Janet Lake (14 miles south)
- 30. McQuade lake (9 miles east)

Hoyt Lakes

- 31. Bird Lake (5 miles southeast)
- 32. Colby Lake (edge of town)
- 33. St. Louis River (6 miles southeast)
- 34. Whitewater lake (1 mile west)

Mountain Iron

- 35. Doherty Lake (5 miles southwest)

Virginia

- 36. Arrowhead "Auto" Lake (14 miles north)
- 37. Big Rice Lake (12 miles north)

SOURCES: Iron Range Resources and Rehabilitation Board, *Iron Range Country: A Historic Travelogue of Minnesota's Iron Ranges*, 1979.

Miles, C.H., and Yaeger, D.P., *Minnesota Outdoor Atlas: A Guide to State and National Recreation Lands in Minnesota*, 1979.

APPENDIX C

List of 1980 Minnesota Summer Festivals

1980 Minnesota Summer Festivals
(June - September, 1980)

<u>City</u>	<u>Name</u>	<u>Date(s)</u>
1. Aitkin	Riverboat Days Arts and Crafts Fair 1980	July 4-7 July 5
2. Akeley	Paul Bunyan Days	June 13-14
3. Albert Lea	Art in the Park	July 20
4. Alexandria	Antique Art Sale and Show Viking Shoot Dry-Mor Summer Fest Art in the Park Invitational Resorters Golf Tournament National Cola Clan Convention	July 4-6 July 5, August 24 July 11-13 July 19-20 August 3-9 August 12-14
5. Askov	Askov Fair and Festivals-Danish Day	August 22-23
6. Audubon	Audubon "108" Days	June 28
7. Austin	Miss Minnesota Pageant National Barrow Show	June 19-20 September 8-10
8. Backus	Corn Festival	August 16
9. Bayport	Bayport Arts and Crafts Fair	June 21
10. Bemidji	Paul Bunyan Playhouse 36th Annual Bemidji Jaycee Water Carnival Art in the Park Birchmont Golf Tournament Vandersluis Memorial Golf Tournament Logging and Sawmill Equipment Festival	June 17-August 17 (Tuesday-Sunday) July 2-6 July 26 July 28-August 2 August 30-September 1 September 12-13
11. Benson	Kid Day	June 13
12. Big Lake	9th Annual Big Lake Spud Fest	June 27-29
13. Blue Earth	4th Annual Blue Earth Rodeo Days	June 7-8
14. Boyd	Boyd Good Time Days	June 6-8
15. Brainerd	Pepsi Grand Prix Heartland Swap Meet and Car Show Minnesota State Bass Tournament Crown/Auto Funny Car Championships Johnny Inkslinger Parade Arts in the Park 7-Up Nationals Camp Confidence Celebrity Golf Tournament Crown/Auto Winston Points Championships Pepsi Can-AM and Trans-AM Quaker State Spectacular	June 14-15 June 15 June 26-28 June 28-29 July 4 July 6 July 12-13 July 18-19 July 26-27 August 9-10 August 23-24
16. Brooklyn Center	Early Bird Days	June 6-15
17. Browns Valley	Sam Brown Days Celebration	June 27-29
18. Buffalo	Fair Haven Mill Art Fair 26th Annual RCA Rodeo	July 19 July 25-27
19. Butterfield	Steam and Gas Engine Show	August 16-17
20. Caledonia	Founder's Days	June 12-15

<u>City</u>	<u>Name</u>	<u>Date(s)</u>
21. Cannon Falls	Cannon Valley Fair	July 2-4
22. Carlos	Horseman's Holiday	June 13-15
23. Cass Lake	Men's and Women's Mixed Doubles Tony Wold Open Cass Lake Lions Water Carnival	June 22, 27, & August 24 June 29 July 25-27
24. Chokio	Chokio Community Picnic	June 11-12
25. Clarissa	Clarissa Summer Fest	July 25-27
26. Cloquet	Art in the Park Lumberjack Days	July 17 July 17-20
27. Cokato	Corn Carnival	August 12
28. Cook	Timber Days	June 20-22
29. Crane Lake	Voyaguer Day	July 12
30. Crosby	Serpent Lake Summer Celebration	July 12-13
31. Dalton	Threshing Bee	September 5-7
32. Dassel	Red Rooster Day	September 1
33. Deer River	Wild Rice Festival	July 25-27
34. Detroit Lakes	Annual Fireworks Display Red River Valley Antique Show 45th Annual Northwest Water Carnival Detroit Lakes Holiday Bridge Tournament Pine to Palm Golf Tournament Detroit Lakes Crazy Daze Pine to Palm Golf Classic Ironman Jr. Golf Tournament	July 4 July 4-6 July 4-13 July 11-13 August 4-10 August 5 August 11-17 August 14-15
35. Donnelly	Threshing Bee	August 23-24
36. Dorset	Back to America Days	July 4
37. Duluth	Grandma's Marathon Duluth Summer Festival of the Arts Independence Day Celebration Spirit of the Mountain Festival International Folk Festival	June 21 June 27-July 6 July 4 July 12-13, 19-20, 26-27 August 2
38. East Grand Forks	Heritage Days Crazy Daze	July 26-27 August 4
39. Eden Prairie	Aquatennial Art and Art Fair	July 18-20
40. Edgerton	Edgerton Dutch Festival	July 15-16
41. Edina	14th Annual Art Fair Gem and Mineral Show	June 6-8 August 15-17
42. Effie	North Star Stampede	July 26-27
43. Elbow Lake	Flekkafest	August 1-3
44. Elgin	Elgin Cheese Days	June 27-29
45. Ellsworth	Nobles County Dairy Days	June 10-12
46. Esko	Lakehead Harvest Reunion, Inc.,	September 13-14, 20-21

<u>City</u>	<u>Name</u>	<u>Date(s)</u>
47. Fairmont	Fairmont Air Show Elm Creek Rambling Arts Festival	September 6-7 September 7
48. Falcon Heights	Minnesota State Fair	August 21-September 1
49. Fergus Falls	Scandinavian Days-Mid Summer Fest Lake Region III Dairy Day Crazy Daze Farmers Market Fly-in	June 20-22 June 25 July 31 August 30, September 20 September 7
50. Foley	Foley Fun Days	June 20-25
51. Forestville State Park	Pony Express Ride	August 31
52. Fosston	NW Minnesota Championship Tractor Pull	September 1
53. Fridley	Fridley 49er Days	June 23-29
54. Ghent	Belgian-American Day	August 1-3
55. Gibbon	Polka Days	July 24-28
56. Glencoe	Glencoe Days Festival	June 6-8
57. Glenwood	Midsommernates Fest Glenwood Waterama	June 22 July 25-27
58. Godahl	Godahl Days	September 1
59. Goodview	Goodview Days	August 22-24
60. Grand Rapids	Cut-Me-Downs and Misery Whips The Sky Pilot in Camp Cooks, Cookee, and Cookies Hayburners and Horsekinners Music in the Woods 4th of July-1900-Forest History Center Grand Rapids Showboat Swindle Sticks and Stamp Hammers Sunday in the Bunkhouse Itasca Vintage Car Club Swap and Sale "Meet the Ranger" The Logging Camp Blacksmith Women's Club Antique Show and Sale Bald Eagle Water Show Forest History Center Open House Forest History Center Nature Trails Lumberjack Day Photo Day at the Forest History Center The Lumberjack Sister	June 1 June 8 June 15 June 22 June 29 July 4 July 10-12, 17-19, 24-26, 31-Aug 2 July 13 July 20 July 27 July 27 August 3 August 6-7 August 9-10 August 17 September 7 September 14 September 21 September 28
61. Granite Falls	Valdres Samband Minnesota State High School Rodeo	June 13-14 June 27-29
62. Hackensack	Paul Bunyan's Sweetheart Days	July 8-9
63. Hamel	Duff's Celebriety Golf Tournament	June 21-22
64. Hastings	Rivertown Days	July 25-27
65. Hawley	Annual P.R.C.A. Rodeo	August 2-3
66. Henderson	JC Antique Agricultural Exposition	July 25-27
67. Hendricks	Hendricks Summerfest 1980	July 4-5
68. Hill City	4th of July Celebration	July 4

<u>City</u>	<u>Name</u>	<u>Date(s)</u>
69. Hinckley	Korn and Kover Karnival	July 11-12
70. Houston	Hoedown Days	July 25-27
71. Hutchinson	Hutchinson Jaycee Water Carnival Arts and Crafts Festival	June 20-22 September 12-13
72. International Falls	Settlers Picnic Open House at Grand Mound	June 15 August 3
73. Iron	Cherry Area Fair and Rodeo	August 30-31
74. Isle	Isle Fun Days	June 27-29
75. Jackson	Town and Country Days Grand National Races	June 20-21 August 21-23
76. Janesville	Hay Daze	June 13-15
77. Kelliher and Waskish	Kelliher-Waskish State Wild Rice Festival	July 11-13
78. La Crescent	Apple Festival	September 19-21
79. Lake Benton	Dakota Minnesota Saddle Horse Holiday	June 15
80. Lake City	Water Ski Days	June 27-29
81. Lakeville	Panorama of Progress	July 4-13
82. Le Sueur	The Mayo House, When it was a Library	September 13
83. Litchfield	Litchfield Watercade	July 10-13
84. Little Falls	Heartland Kite Fly Heartland Folk Festival Arts and Crafts Show Lindbergh Call to the Colors	June 1 June 29 September 6-7 September 28
85. Little Fork	Fourth Annual Jamboree	August 8-10
86. Longville	Fireworks Display Cornfest	July 4 August 2
87. Lutsen	13th Annual North Shore Art Fair	July 12-13
88. Luverne	Green Earth Community Theater Tri-State Band Festival	June 6,7,13,14; July 5,6,12,13,14 September 27
89. Mankato	Mankato Sports Classic Minnesota Sit'N'Spit Club Int'l Marble Tournament Bend of the River Days Joan Garvin Classic Doll Show and Sale Mankato-Mdewakaton Pow-wow	June 9 July 6 July 11-13 July 28 August 24 September 19-21
90. Marshall	Schwan's International Rolle Boile Tournament	June 29
91. McGregor	Wild Rice Days	August 30
92. Medford	Straight River Day Canoe Derby	June 1
93. Milaca	Milaca Jaycees Community Festival	July 5-9

<u>City</u>	<u>Name</u>	<u>Date(s)</u>
94. Minneapolis	Mini Festivals Greater Lake Street International Bazaar Danish Day Minnesota Corporate Running Series Rose Feta Candy Education Appreciation Week Svenskarnas Dag 2nd Annual Old St. Anthony Heritage Festival Norway Day Minneapolis Aquatennial MWPGA State Championship Camden Showboat Days Uptown Art Fair	June, July, August June 7-8 June 8 June 14, July 18 June 15 June 15-21 June 22 June 28-29 July 13 July 18-27 July 19-20 July 24-27 August 8-10
95. Minnesota Lake	Festag Days	July 22-23
96. Montevideo	Fiesta Days	June 19-22
97. Montgomery	46th Annual Kolacky Day	July 27
98. Moorhead	Annual Old Fashioned 4th of July Historic Eighth Street Summer/Fest	July 4 August 3
99. Moose Lake	Agate Days	July 19-20
100. Morris	Homemakers Workshop Fall Festival	June 17-18 September 13
101. Moundsview	Minnesota State Music and Polka Festival	June 20-22
102. Mountain Lake	Pow Wow Utshtallung	June 23-24 September 13
103. Nevis	Muskie Days	July 8-9
104. New Hope	New Hope "Duk Duk Daze"	July 11-13
105. New Ulm	June Dairy Showcase Heritagefest	June 26-28 July 17-20
106. New York Mills	Kesa Juhla	June 26-28
107. Nisswa	Turtle Races Art Fair Gull Lake Yacht Club-Fun Regatta Crazy Daze	June 25-each Wed thru Aug 20 July 25-26 August 1-3 August 8-9
108. North Branch	Krazy Daze	September 27
109. Northfield	Northfield Musical Theater Art Fair	August 1-3, 8-10, 15-17 September 5-7, 12-14, 19-21 September 6
110. North Mankato	North Mankato Fun Days	July 10-13
111. Olivia	Olivia Corn Capital Days	July 25-27
112. Onamia	Onamia Days	June 13-15
113. Ortonville	Sweet Corn Festival	August 15-17
114. Osakis	Osakis Festival	June 29-July 6
115. Outing	Outing Waterama	July 19
116. Owatonna	Fireworks Display Septemberfest	July 4 September 14

<u>City</u>	<u>Name</u>	<u>Date(s)</u>
117. Park Rapids	100 Years of Crime in Park Rapids A Celebration of the State of Minnesota Square Dance Festival Centennial Celebration Art in the Sun 4th of July Fireworks Display Shell Prairie Fair Jaycees Logging Days Antique Show and Sale Crazy Days North Star Arts and Crafts Festival Summers Last Stand	June 14 June 20-21 June 22 June 29-July 6 July 2 July 4 July 14-17 July 17-20 July 24-25 July 31-August 1 August 4-6 August 30
118. Paynesville	Town and Country Days	July 7-9
119. Pelican Rapids	Sidewalk Art Exhibit Sidewalk Flea Market Antique Car Show Sidewalk Flea Market Turkey Races and Barbeque Free Bean Feed	June 13 June 27 July 11 June 27, July 25, Aug 29 August 1-2 August 22
120. Perham	Junefest Pioneer Days Crazy Days	June 28 August 17 August 30
121. Pierz	4th of July Open Horseshoe Tournament Minnesota State Horseshoe Tournament	July 5-6 August 29-September 1
122. Pine City	International Polka Festival Snake River Rendezvous	June 27-29 September 27-28
123. Pine Island	Pine Island Cheese Festival	June 7-9
124. Pine River	Annual Spring Festival Art Show Fall Celebration	June 13-14 July 31-August 3 August 15-16
125. Pipestone	Song of Hiawatha Pageant	July 18-20, 25-27, August 1-3
126. Proctor	Hoghead Festival	August 16
127. Red Wing	Great River Band Extravaganza 4th of July Celebration Community Arts Festival	June 24 July 4 September 20-21
128. Redwood Falls	Minnesota Inventors Congress	June 13-15
129. Remer	Harvest Festival	August 8-9
130. Robbinsdale	Whiz Bang Days	July 11-13
131. Rochester	Festival of the Arts MWPGA State Seniors Championship Sixth Annual Threshing Show Gladiolus Festival Town and Country Antiques Show	June 8 August 7-8 August 9-10 August 15-17 September 12-14
132. Rosemount	Leprechaun Days	July 24-27
133. Rushford	Homecoming "80"	July 3-6
134. St. Cloud	7th Annual Downtown Mall Art Fair Central Minnesota Dairy Day Crazy Days Lemonade Concert and Art Fair St. Cloud Country Club Pro-AM	June 13 June 17 July 16-17 August 5 September 13-14
135. St. James	Pioneer Railroad Days	July 4-6

<u>City</u>	<u>Name</u>	<u>Date(s)</u>
136. St. Paul	Grand Old Day	June 1
	3rd Annual Lowertown Art Fair	June 6-8
	St. Anthony Park June Festival	June 7
	Ice Cream Social	June 8
	Deutscher Tag (German Day)	June 8
	Everything but the Grape	June 8
	History Theatre at Fort Snelling	June 13,14,15,20,21,22,27,28,29
	Civil War Weekend	June 14-15
	The Ojibwa Craftsman	June 21
	The Weaver-Crafts of the 1820's	June 28
	Independence Day Celebration	July 4
	The Chair Seat Weaver	July 12
	<u>Festival on the Bluff</u>	July 13
	Lace Making on the Alexander Ramsey House Porch	July 13
	The Wheelwright	July 19
	Fire Fighters Ice Cream Social	July 20
	Ice Cream Social	July 27
	Fur Trade Weekend	July 26-27
	The Gunsmith	August 2
	Fourth Annual Jubilee	August 8-10
	Historic Fort Snelling Open House	August 9-10
	Threshing Bee	August 10
	The Clockmaker	August 16
	The Tinsmith	August 23
	A Surrey with a Fringe on Top	August 31
137. St. Peter	Old Fashioned Independence Day Picnic	July 4
138. Sauk Centre	Sinclair Lewis Days	July 18-20
	Crazy Day	July 26
	Fall Festival	September 4-6
139. Sauk Rapids	Sportsman's Picnic	July 26-27
140. Shakopee	Sheep to Shawl	June 7-8
	4th of July Celebration	July 4-6
	Corn Feed	August 10
	Renaissance Festival	August 16-17, 23-24, 30-Sept. 1
	Labor Day Festival	September 6-7, 13-14, 20-21
	Harvest Dinner	August 30-September 1
		September 21
141. Silver Lake	Pola-Czesky Days	August 1-3
142. South St. Paul	South St. Paul Kaposia Days	July 3-6
143. Spicer	July 4th Celebration	July 3-6
144. Spring Lake Park	Tower Days	May 30-June 4
145. Spring Valley	Fillmore County Dairy Day	June 14
	Crazy Days	July 30-August 2
	Agricultural Fair	August 16
146. Starbuck	Region V Dairy Days	June 28-29
147. Stillwater	Drum Beauty '80'	July 30-31
	Lumberjack Days '80'	July 31-August 3
148. Swanville	18th Annual Swanville Midsummer Carnival and Plowville USA	July 11-13
149. Thief River Falls	Thief River Falls Flea Market	May 17, June 21, July 19, August 16, September 20
150. Tower	4th of July Festival	July 4
151. Tracy	Box Car Days	August 30-September 1

<u>City</u>	<u>Name</u>	<u>Date(s)</u>
152. Traverse	Traverse Luau	September 1
153. Tyler	Aebleskiver Days	July 13-14
154. Verndale	Straw Hat and Sunbonnet Days	August 2-3
155. Viola	Viola Gopher Count	June 18-19
156. Virginia	Land of the Loon Ethnic Arts and Crafts Festival	June 21-22
157. Walker	Old Fashioned Fourth of July Celebration Leech Lake Regatta #10 Walker Art Show 19th Annual Muskie/Northern Derby Days Walker Art Show Labor Day Barbershop Show Muskies, Inc. Tournament	June 28-July 6 July 3-6 July 5-6 August 2-7 August 14 August 30-31 September 5-7
158. Walnut Grove	Fragments of a Dream Plum Creek Heritage Arts and Crafts Festival Corn-Bean Day Farm Show	July 4-6, 11-13 July 5 September 3-4
159. Waseca	Waseca Water Weekend Horticulture Day	June 21-22 August 3
160. West Concord	Berne Swissfest	August 12
161. White Bear Lake	Manitou Days	June 20-29
162. Willmar	Heritage Day Kaffee Fest	June 26 June 26-28
163. Windom	Riverdays 1980	June 6-8
164. Winona	Steamboat Days	June 30-July 6
165. Winthrop	Town and Country Daze	June 23-25
166. Young America	Stiftung Fest	August 29-31

SOURCE: Minnesota Department of Economic Development, Tourism Bureau, *1980 Spring/Summer Calendar of Events*, pg 1-14.

APPENDIX D

Development and Use of On-Site Surveys in Monitoring
Tourism Development and Impact on the Iron Range

DEVELOPMENT AND USE OF ON-SITE SURVEYS IN MONITORING
TOURISM DEVELOPMENT AND IMPACT ON THE IRON RANGE

On-site surveys can be of great value to the IRRRB in four key aspects of program development.

- Identification of the market being served, including location, party size, purpose of trip, destination in area, activities, and repeat visitor market.
- Evaluation of promotional effectiveness, i.e., how people have heard of attractions--word of mouth, radio advertising, information centers, etc.
- Determination of the economic impact of the facility/group of facilities, including the number of nights stayed, dollars spent on the Range during the day of the visit, number of other attractions visited, and ability to draw visitors on short day trips.
- Estimation of the value of the facility to the party, i.e., did the admission fee represent a good value, are visitors returning, etc.

With these aspects in mind, we have developed a series of questions to give the IRRRB solid information for decision making. All on-site surveys must have a purpose and the survey questions should be custom tailored to satisfy the purpose. We strongly suggest that any survey developed by only one page long (either letter- or legal-size) to keep respondent burden to a minimum.

Market Identification Questions. Below are eight questions to establish market identification profiles. Sensitive questions (e.g., relating to family income) have been intentionally left out because they may lower both the overall response rate and item/question response for any questions occurring after a sensitive question.

1. Please give us your five digit zip code ___ ___ ___ ___ ___

2. What is your destination? (check your main destination)

___ None in particular	___ Resort (nearest town) _____
___ Hibbing/Virginia Area	___ Cabin (nearest town) _____
___ Ely/Boundary Waters Area	___ Campground (nearest town) _____
___ Voyageurs National Park	___ Other (please specify) _____
___ Canada	_____

3. How many are in your party?

___ 1	___ 3 or 4
___ 2	___ 5 or more

4. What is the age of the head of your party/family?

- | | |
|-----------------------------------|-----------------------------------|
| <input type="checkbox"/> under 30 | <input type="checkbox"/> 50 to 59 |
| <input type="checkbox"/> 30 to 39 | <input type="checkbox"/> Over 60 |
| <input type="checkbox"/> 40 to 49 | |

5. What was (were) your mode(s) of transportation? (check all that apply)

- | | | |
|-----------------------------------|--|---|
| <input type="checkbox"/> Airplane | <input type="checkbox"/> Automobile | <input type="checkbox"/> Recreational Vehicle |
| <input type="checkbox"/> Bus | <input type="checkbox"/> Truck & Trailer | <input type="checkbox"/> Other (please specify) |
-

6. What are the purposes of your trip? (check all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Visit Family or Friends | <input type="checkbox"/> Outdoor Activities |
| <input type="checkbox"/> Business | <input type="checkbox"/> Other (please specify) |
| <input type="checkbox"/> Meeting/Convention | |
-

7. Have you been here before?

- ☐ Yes, how often _____ (times in the last 5 years)
- ☐ No

8. What activities have you participated in on your trip(s) to the area? (check all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Fishing | <input type="checkbox"/> Area Tours |
| <input type="checkbox"/> Boating | <input type="checkbox"/> Performing Arts |
| <input type="checkbox"/> Canoeing | <input type="checkbox"/> Ethnic/Seasonal Festivals |
| <input type="checkbox"/> Hiking | <input type="checkbox"/> Mine or Plant Tours |
| <input type="checkbox"/> Cross Country Skiing | <input type="checkbox"/> Visiting Historic Sites |
| <input type="checkbox"/> Downhill Skiing | <input type="checkbox"/> Visiting Museums |
| <input type="checkbox"/> Camping | <input type="checkbox"/> Shopping |
| <input type="checkbox"/> Swimming | <input type="checkbox"/> Relaxed and Did Nothing |
| | <input type="checkbox"/> Other (please specify) |
-

Promotional Effectiveness. While many questions may effectively evaluate promotional efforts, one seems most appropriate.

1. How have you obtained information about the range area? (check all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Never Obtained Any | <input type="checkbox"/> Billboards |
| <input type="checkbox"/> Friend/Relative/Word of Mouth | <input type="checkbox"/> Wrote in a Request |
| <input type="checkbox"/> Newspapers | <input type="checkbox"/> Information Center |
| <input type="checkbox"/> Radio | <input type="checkbox"/> Other (please specify) |
| <input type="checkbox"/> Magazines | |
-

Economic Impact. The six questions below can be used together to monitor economic impact. Dollars spent in the area per group can be estimated by multiplying the number of nights (question 2) by daily spending (question 5).

1. How far did you travel to get to the Iron Range Interpretative Center Today? (please round to the nearest 5 miles)
 _____ Miles
2. How many nights will you be staying in the Hibbing/Chisholm/Virginia-Eveleth Area?
 _____ Number of Nights in Area
3. How many nights will you spend here in Northeastern Minnesota?
 _____ Number of Nights in Northeast
4. In what type of lodging are your staying tonight?

_____ None Available in Area	_____ Cabin (your own ____, another ____)
_____ Hotel/Motel	_____ Camping
_____ Home of Friend or Relative	_____ Other (please specify)
_____ Resort	_____ Don't Know
5. How much will you spend today in the area? (including lodging, food, gifts and all other spending for the day)
 \$ _____ (please round to the nearest \$10)
6. What other attractions are you planning to visit in the area?

_____ Hull-Rust Area	_____ Ethnic Days Festival
_____ Hockey Hall of Fame	_____
_____ (remaining attractions	_____
_____ listed to depend on where	_____
_____ questionnaire is	_____
_____ distributed)	_____

Value of Facility. The measure of facility value can be examined in three or four questions--the three below and question 7 under market identification. Question 1 may give some indication about whether admission fees can be raised.

1. Did the admission fee represent a good value?
 _____ Yes
 _____ No Please tell us why not _____

2. What added activities/exhibits would enhance your experience at the _____?

- | | |
|--|--|
| <input type="checkbox"/> None, there is more than enough to see/do | <input type="checkbox"/> (remaining items could be a list of future possibilities) |
| <input type="checkbox"/> Walking Tours | <input type="checkbox"/> Other (please specify) |
| <input type="checkbox"/> Food Service | _____ |

3. Would you recommend the _____ to your friends?

- ☐ Yes, it should not be missed.
- ☐ Yes, only if it's raining.
- ☐ No. Please tell us why not. _____
- _____

Questionnaire Layout. On the next page is a sample questionnaire dealing mainly with market definition and activity issues. Each should have a facility code so interpretation can be made for individual sites. And the questionnaire should close with a question allowing the respondent to ask for more information about the area. Again, keeping the survey to one page is important. If more topics need to be analyzed, separate surveys should be done--*but* some market identification questions should be included in each so that any analysis can determine if respondents to any one group of surveys are unusually different on that day at the site.

IRON RANGE AREA VISITOR SURVEY

Facility Code _____

1. PLEASE GIVE US YOUR FIVE DIGIT ZIP CODE _____
2. WHAT IS YOUR DESTINATION?
(check your main destination)
 ___ None in particular ___ Resort (nearest town) _____
 ___ Hibbing/Virgina Area ___ Cabin (nearest town) _____
 ___ Ely/Boundary Waters Area ___ Campground (nearest town) _____
 ___ Voyageurs National Park ___ Other (please specify) _____
 ___ Canada _____
3. HOW MANY ARE IN YOUR PARTY?
 ___ 1 ___ 3 or 4
 ___ 2 ___ 5 or more
4. WHAT WAS (were) YOUR MODE(s) OF TRANSPORTATION?
(check all that apply)
 ___ Airplane ___ Automobile ___ RV
 ___ Bus ___ Truck & Trailer ___ Other (please specify) _____
5. WHAT ARE THE PURPOSES OF YOUR TRIP?
(check all that apply)
 ___ Visit Family or Friends ___ Outdoor Activities
 ___ Business ___ Other (please specify) _____
 ___ Meeting/Convention _____
6. HAVE YOU BEEN HERE BEFORE?
 ___ Yes, How Often _____ (times in the last 5 years)
 ___ No
7. HOW HAVE YOU OBTAINED INFORMATION ABOUT THE RANGE AREA?
 ___ Never obtained any ___ Billboards
 ___ Friend/Relative/Word of Mouth ___ Wrote in a Request
 ___ Newspapers ___ Information Center
 ___ Radio ___ Other (please specify) _____
 ___ Magazines _____
8. WHAT ACTIVITIES HAVE YOU PARTICIPATED IN ON YOUR TRIP(s) TO THE AREA?
(check all that apply)
 ___ Fishing ___ Area Tours
 ___ Boating ___ Performing Arts
 ___ Canoeing ___ Ethnic/Seasonal Festivals
 ___ Hiking ___ Mine or Plant Tours
 ___ Cross-Country Skiing ___ Visiting Historic Sites
 ___ Down-Hill Skiing ___ Visiting Museums
 ___ Camping ___ Shopping
 ___ Swimming ___ Relaxed and Did Nothing
 ___ Other (please specify) _____
9. WOULD YOU LIKE MORE INFORMATION ON ANY OF THE ABOVE ACTIVITIES?
 (CIRCLE ABOVE ACTIVITIES OR IRON RANGE LOCATIONS)
 Contact the manager of the facility where you are staying or leave your
 name and address so we can mail the information to you.

Name _____

Street _____

City, State, Zip _____