

# Minnesota Traveler Profile Fall 2005 (September—November)

Prepared for:

**Explore Minnesota Tourism**  
State of Minnesota



UNIVERSITY OF MINNESOTA



and

**Minnesota Arrowhead Association  
Minnesota Heartland Tourism Association  
Southern Minnesota Tourism Association  
Metro Tourism Committee**

Prepared by:

**Davidson-Peterson Associates**  
A Division of Digital Research, Inc.  
201 Lafayette Center  
Kennebunk, ME 04043

January 2006

## **Introduction**

The purpose of this report is to highlight some of the key findings from the fall Traveler Profile Study. This report will also serve to summarize the data collection process employed in this study.

The traveler profile is part of a 12-month economic impact and traveler profile research study for the State of Minnesota. This report provides results from surveys of travelers throughout the state during September, October and November. To qualify for the survey, the respondent could not reside in the immediate area and had to be either spending at least one night in the area or, if a day visitor, had to have traveled at least 50 miles from home.

This report is the second of three traveler profile quarterly reports that will be incorporated into an annual traveler profile report following the spring quarter of 2006. A similar series of three quarterly lodging revenue update reports will follow the quarterly traveler profiles by about a month.

At the end of the study, results provided in all of the quarterly reports will be combined with results for the spring quarter of 2006 and additional data in a computer model to estimate state, regional and county level economic impact, as well as to provide detailed state and regional traveler profile information balanced by region and season.

## **Findings**

Wherever differences among regional results are discussed in the findings, the differences are significant at the 95% confidence level. Refer to the appendix for an explanation of significant differences and a table that shows all significant differences among survey results.

### **Demographic and Socioeconomic Profile**

Typically, 2005 fall travelers in Minnesota were middle-aged, middle income, and white. The vast majority lived in the United States and half were Minnesota residents.

- The average age of travelers was 44.1 years.

- The median household income was \$58,400.
- Nine travelers in ten identified themselves as white (90%).
- The vast majority lived in the United States (97%) and half were residents of Minnesota (53%). Travelers to Minnesota resided in more than 40 different states. Beyond Minnesota, the leading states of residence were the contiguous states of North Dakota (10%), Wisconsin (6%), Iowa (4%), and South Dakota (2%) plus Illinois (2%).

The Northeast region had the largest proportion of travelers from within Minnesota (79%), while the North central/West region had the smallest (29%). Also, the North central/West region had the largest proportion of travelers from North Dakota (44%). Finally, the Southern region had the largest proportion of travelers from Iowa (8%).

### **Travel Party and Trip Profile**

Most 2005 fall travelers in Minnesota were taking a vacation or short pleasure trip, traveling in parties of 2 or 3 people, and staying a total of 2 or 3 nights. Also, three-fourths of travel parties had no children younger than 18 in them and most were returning travelers having taken at least one pleasure trip to Minnesota in the last 5 years. Finally, three travelers in five stayed in paid accommodations and the most popular activities were dining out, shopping, visiting friends or relatives, attending fairs or festivals, and nightlife or evening entertainment.

- Three travelers in five were on a vacation or short pleasure trip (59%), while 21% were traveling for personal reasons (e.g., a wedding or funeral).

Travelers in the North central/West region were more likely to have been on a vacation or short pleasure trip (80% NCW). In contrast, travelers in the Southern region were more likely to have been traveling for personal reasons (28%), while travelers in the Metro region were more likely to have been traveling for a convention or conference (18%).

- The average party size was 2.7 people.

- The average number of nights travel parties intended to stay in the area was 3.1 nights.

Travelers stayed longer in the Twin Cities Metro region (3.7 days) than in the other Minnesota regions.

- Three-fourths of Minnesota travelers had no children younger than 18 in their travel party (75%).
- Nine travelers in ten had taken a pleasure trip in Minnesota during the last 5 years (92%). Travelers in the Twin Cities Metro region were more likely to be first-time visitors to Minnesota (13%).
- The estimated number of median trips to Minnesota in the last 5 years was 6.4 trips. Travelers in the Northeast region took more Minnesota trips in the last 5 years (8.8 trips).
- The majority of travelers stayed in paid accommodations (58%), primarily hotels or motels (50%), with few at bed and breakfast places (2%), resorts (2%), RVs at a campground (2%), or tents at a campground (2%).

Travelers in the Northeast region were more likely to stay in a hotel/motel/historic inn (59%), while travelers in the North central/West region were more likely to stay in a tent at a campground (6%). Finally, travelers in the Northeast region were least likely to stay in the home of family or friends (7%), while travelers in the North central/West region were more likely to stay in the vacation home, condo, cabin or houseboat of a family or friend (6%).

- One Minnesota traveler in five was on a day trip (20%).
- Travelers mentioned numerous activities that they participated in during their visit. Dining out (62%), shopping (53%), visiting friends or relatives (36%), attending fairs or festivals (23%), and nightlife or evening entertainment (21%) were among the most frequently mentioned activities.

Travelers in the North central/West region (59%) were more likely to have participated in outdoor activities such as swimming, fishing, wildlife viewing or bird watching, and golfing. In addition, travelers in the North central/West region and the Northeast region were more likely to have visited state or national parks (23% NCW and 12% NE).

Also, travelers in the North central/West region (44%) were more likely to have participated in casino gaming and travelers in the North central/West region as well as the Northeast region were more likely to have participated in sightseeing or driving for pleasure (34% NCW and 22% NE).

Travelers in the Twin Cities Metro region were more likely to have attended fairs or festivals (45%) and to have shopped at the Mall of America (32%).

Finally, travelers in the Southern region (21%) were more likely to have participated in biking.

**Table 1:  
Demographic and Socioeconomic Profile**

	State Total	Region			
	Base: Fall 2005 449	Metro 113	NCW 102	Southern 121	NE 113
<b>Age:</b>					
18 to 24	11%	10%	11%	12%	12%
25 to 29	10	12	13	7	7
30 to 39	16	15	18	13	18
40 to 49	26	24	25	27	27
50 to 59	20	18	25	18	18
60 to 64	8	5	5	12	7
65 and older	8	13	4	7	7
No Answer	3	4	0	2	5
<b>Average Age</b>	<b>44.1 years</b>	<b>44.7</b>	<b>42.6</b>	<b>45.0</b>	<b>43.9</b>
<b>Income:</b>					
Less than \$25,000	12%	11%	21%	6%	11%
\$25,000 to \$34,999	11	6	20	12	8
\$35,000 to \$49,999	14	17	12	17	11
\$50,000 to \$74,999	19	18	28	12	19
\$75,000 to \$99,999	16	14	11	23	13
\$100,000 to \$124,999	8	5	5	12	9
\$125,000 to \$149,999	2	2	2	0	4
\$150,000 or more	5	7	1	4	8
No Answer	14	20	1	15	18
<b>Estimated Median Income</b>	<b>\$58,400</b>	<b>\$58,700</b>	<b>\$46,900</b>	<b>\$67,500</b>	<b>\$66,100</b>
<b>Gender:</b>					
Male	47%	47%	53%	36%	55%
Female	50	50	47	60	42
No Answer	2	3	0	3	3
<b>Racial/Ethnic Background:</b>					
American Indian	2%	3%	2%	0%	3%
Asian	1	2	0	0	1
Black	3	4	3	2	3
Hispanic	2	3	3	2	2
White	90	86	88	93	90
Other	0	0	0	0	0
No Answer	3	4	4	2	3

**Table 1 (con't):  
Demographic and Socioeconomic Profile**

	State Total	Region			
	Fall 2005	Metro	NCW	Southern	NE
<b>Base:</b>	<b>449</b>	<b>113</b>	<b>102</b>	<b>121</b>	<b>113</b>
<b>Residence:</b>					
<u>United States</u>	<u>97%</u>	<u>94%</u>	<u>96%</u>	<u>98%</u>	<u>99%</u>
Minnesota	53	47	29	53	79
North Dakota	10	2	44	0	0
Wisconsin	6	10	0	9	4
Iowa	4	5	1	8	2
Illinois	2	1	2	4	0
South Dakota	2	2	2	3	0
California	1	1	0	3	0
Michigan	1	2	0	0	1
Texas	1	1	1	1	0
Other state	6	13	6	5	2
No answer	11	10	11	12	11
Canada	1	2	1	0	1
Another Country	1	2	0	1	0
No Answer	1	2	3	1	0

**Table 2:  
Travel Party Profile**

	State Total	Region			
	Base: Fall 2005 449	Metro 113	NCW 102	Southern 121	NE 113
<b>Trip Purpose (multi-response):</b>					
Vacation or short pleasure trip	59%	52%	80%	48%	57%
Personal (e.g., wedding, funeral)	21	17	16	28	23
Business or work	16	19	5	19	19
Convention or conference	8	18	4	7	3
No Answer	2	3	0	2	3
<b>Travel Party Size:</b>					
1 person	14%	24%	8%	16%	9%
2 people	41	32	46	38	48
3 to 4 people	32	29	40	30	30
5 or more people	13	15	6	17	13
<b>Average Travel Party Size</b>	<b>2.7</b>	<b>2.7</b>	<b>2.7</b>	<b>2.8</b>	<b>2.8</b>
<b>Total Trip Length of Stay:</b>					
Daytripper	20%	24%	15%	17%	23%
1 night	17	12	10	31	16
2 nights	23	18	27	21	27
3 to 6 nights	34	38	47	24	30
7 or more nights	5	9	1	7	4
<b>Average Nights (Excluding Daytrippers)</b>	<b>3.1</b>	<b>3.7</b>	<b>2.9</b>	<b>2.9</b>	<b>2.7</b>
<b>Children in Travel Party</b>					
One or more children under 18 years old	25%	28%	25%	24%	23%
No children	75	72	75	76	77
<b>Ages of Children in Travel Party</b>					
<i>Younger than 6 years old</i>					
None	92%	89%	92%	90%	96%
One or more	8	11	8	10	4
<i>6 to 11 years old</i>					
None	88	86	92	88	88
One or more	12	14	8	12	12
<i>12 to 17 years old</i>					
None	88	84	87	89	89
One or more	12	16	13	11	11

**Table 2 (con't):  
Travel Party Profile**

	State Total Fall 2005 Base: 449	Region			
		Metro 113	NCW 102	Southern 121	NE 113
<b>Minnesota Trips in Last 5 Years</b>					
None	8%	13%	1%	10%	6%
1 trip	5	10	7	5	0
2 to 4 trips	30	27	45	28	23
5 to 10 trips	27	21	27	28	30
More than 10 trips	29	27	20	29	38
No Answer	1	2	0	0	3
<b>Estimated Median Trips</b>	<b>6.4</b>	<b>5.0</b>	<b>4.8</b>	<b>6.5</b>	<b>8.8</b>
<b>Lodging:</b>					
<u>Paid Accommodations</u>	<u>58%</u>	<u>52%</u>	<u>58%</u>	<u>55%</u>	<u>67%</u>
Hotel/Motel/Historic Inn	50	50	48	44	59
Bed & Breakfast	2	1	1	4	0
Resort	2	1	3	3	2
In an RV at a campground	2	0	0	2	4
In a tent at a campground	2	0	6	1	1
Vacation home/condo/cabin/houseboat you rented	0	1	0	0	1
<u>Unpaid Accommodations</u>	<u>22%</u>	<u>24%</u>	<u>27%</u>	<u>28%</u>	<u>10%</u>
Home of family or friends	19	23	22	26	7
Vacation home/condo/cabin/houseboat of family or friend	2	1	6	1	1
At your vacation home/condo/cabin/houseboat	1	0	0	1	2
At a campground with no fee	0	0	0	1	0
<u>Day tripper</u>	<u>20%</u>	<u>24%</u>	<u>15%</u>	<u>17%</u>	<u>23%</u>
<b>Activities:</b>					
<u>General (checked one or more of the following)</u>	<u>82%</u>	<u>70%</u>	<u>94%</u>	<u>82%</u>	<u>82%</u>
Dining out	62	50	62	66	70
Nightlife or evening entertainment	21	14	29	18	23
Sightseeing or driving for pleasure	19	11	34	12	22
Casino gaming	17	11	44	4	13
Taking in city sites	16	15	9	21	16
Viewing fall colors	15	11	20	17	14
Driving on designated scenic byways	13	5	14	13	19

**Table 2 (con't):  
Travel Party Profile**

	State Total	Region			
	Fall 2005	Metro	NCW	Southern	NE
<b>Base:</b>	<b>449</b>	<b>113</b>	<b>102</b>	<b>121</b>	<b>113</b>
<u>Shopping (checked one or more of the following)</u>	<u>53%</u>	<u>56%</u>	<u>69%</u>	<u>45%</u>	<u>43%</u>
For gifts or souvenirs	26	16	46	23	21
General or mall shopping	20	19	20	20	22
At the Mall of America	13	32	15	5	2
Arts, crafts, or antiques	13	4	17	7	7
Outlet shopping	10	9	17	7	7
<u>Visiting (checked one or more of the following)</u>	<u>52%</u>	<u>45%</u>	<u>70%</u>	<u>47%</u>	<u>49%</u>
Friends or relatives	36	28	50	35	31
State or national parks	10	4	23	4	12
Amusement parks or carnivals	9	17	13	5	4
Historic sites	8	2	11	9	12
Other museums	6	3	8	3	12
Art museums	5	4	11	3	3
Outdoor water parks	3	2	9	1	2
Indoor water parks	3	5	3	2	2
Indian areas	2	1	4	1	2
Other attraction	1	1	0	0	2
<u>Attending (checked one or more of the following)</u>	<u>41%</u>	<u>51%</u>	<u>33%</u>	<u>36%</u>	<u>42%</u>
Fairs or festivals	23	45	13	17	16
Amateur sporting events	10	1	7	12	18
Popular music concerts or shows	6	4	11	6	2
Professional sporting events	5	4	3	2	12
Theater performances	4	3	2	7	5
Classical music concerts	1	1	2	1	2
Other events	3	3	3	4	1
<u>Participating In (checked one or more of the following)</u>	<u>39%</u>	<u>16%</u>	<u>59%</u>	<u>45%</u>	<u>40%</u>
Pool swimming	14	4	23	10	20
Hiking	10	6	14	7	15
Biking	9	4	6	21	4
Fishing	8	4	15	6	8
Lake or river swimming	5	3	12	2	4
Wildlife viewing or bird watching	4	1	10	3	4
Golfing	4	1	8	4	4
Canoeing	4	2	6	3	4
Motor boating/water skiing	3	1	7	1	3
Jet skiing	2	0	8	1	1
Off-road ATV driving	2	0	3	0	5
Hunting	2	1	1	2	5
Other activity	2	3	1	2	2
No Answer	3	5	0	2	4

## **Methodology**

Using a stratified cluster sample, a total of sixteen (16) interview days were selected to intercept fall travelers in Minnesota, four (4) interview days in each of the four (4) regions. At more than 20 interview sites, travelers were intercepted and asked to complete a self-administered questionnaire. To qualify for the survey, respondents could not be a year-round, seasonal, or short-term/weekend resident of either the town or city or the immediate surrounding area. In addition, respondents had to be either spending at least one night in the area or be a day visitor who had traveled at least 50 miles from their primary residence. Finally, interviews were conducted on both weekends and weekdays as well as throughout the day and early evening.

In total, 449 usable questionnaires were collected from Minnesota travelers and returned to Davidson-Peterson Associates. Questionnaires were checked for completeness, accuracy and verified; the data entered; and tables produced. A sample of 449 is considered accurate to plus or minus 4.62 percentage points at the 95% confidence level. The following table shows the confidence levels at 95% for each region:

<b>Region</b>	<b>Sample Size</b>	<b>Confidence Level</b>
Twin Cities Metro	113	± 9.25
North central/West	102	± 9.75
Southern	121	± 8.94
Northeast	113	± 9.25
<b>Total</b>	<b>449</b>	<b>± 4.62</b>

\* For a list of the Minnesota counties in each region as well as a regional map, refer to the Appendix

Roughly equal proportions of interviews were completed in each of the four (4) Explore Minnesota Tourism regions. No weighting has been done to the data presented. Sample balancing will be done at the end of the study so that the visitor data more accurately reflects annual and regional visitation patterns.

Davidson-Peterson Associates, an independent marketing research company located in Kennebunk, ME, managed the fieldwork, conducted the data tabulation, and prepared this report. All procedures were conducted in accordance with accepted research standards as expressed by CASRO (Council of American Survey Research Organizations).

## APPENDIX

## COUNTIES WITHIN MINNESOTA'S TOURISM REGIONS

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

# MINNESOTA'S TOURISM REGIONS



## STATISTICAL DIFFERENCES

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

The following is an example of how these tables can be interpreted and used. The proportion of male respondents in both the North central/West region (53%) and the Northeast region (55%) was significantly higher than the proportion of male respondents in the Southern region (36%). Likewise, the proportion of female respondents in the Southern region (60%) was significantly higher than the proportion of female respondents in the North central/West region (47%) as well as the Northeast region (42%).

**Table A1:  
Demographic and Socioeconomic Profile  
Statistical Differences among Regional Results**

	State Total Fall 2005	Region			
		Metro	NCW	Southern	NE
<b>Base:</b>	<b>449</b>	<b>113</b>	<b>102</b>	<b>121</b>	<b>113</b>
		<b>a</b>	<b>b</b>	<b>c</b>	<b>d</b>
<b>Gender:</b>					
Male	49%	47%	53% <b>c</b>	36%	55% <b>c</b>
Female	49	50	47	60 <b>bd</b>	42
<b>Residence:</b>					
Minnesota	52	47% <b>b</b>	29%	53% <b>b</b>	79% <b>abc</b>
North Dakota	10	2	44 <b>a</b>	0	0
Iowa	4	5	1	8 <b>bd</b>	2
Other state	9	13 <b>d</b>	6	5	2

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

**Table A2:  
Travel Party Profile  
Statistical Differences among Regional Results**

	State Total Fall 2005 Base: 449	Region			
		Metro 113 a	NCW 102 b	Southern 121 c	NE 113 d
<b>Trip Purpose (multi-response):</b>					
Vacation or short pleasure trip	59%	52%	80%acd	48%	57%
Personal (i.e. wedding, funeral)	21	17	16	28ab	23
Business or work	16	19b	5	19b	19b
Convention or conference	8	18bcd	4	7	3
<b>Average Nights (Excluding Daytrippers)</b>	<b>3.1</b>	<b>3.7bd</b>	<b>2.9</b>	<b>2.9</b>	<b>2.7</b>
<b>Ages of Children in Travel Party</b>					
<i>Younger than 6 years old</i>					
None	88%	90%	85%	92%bd	83%
One or more	12	10	15c	8	17c
<b>Minnesota Trips in Last 5 Years</b>					
None	8%	13%b	1%	10%	6%
<b>Estimated Median Trips</b>	<b>6.4</b>	<b>5.0</b>	<b>4.8</b>	<b>6.5</b>	<b>8.8ab</b>
<b>Lodging:</b>					
<u>Paid Accommodations</u>					
Hotel/Motel/Historic Inn	50	50	48	44	59c
In a tent at a campground	2	0	6cd	1	1
<u>Unpaid Accommodations</u>					
Home of family or friends	19	23d	22d	26d	7
Vacation home/condo/cabin/houseboat of family or friend	2	1	6acd	1	1

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

**Table A3:  
Travel Party Activities  
Statistical Differences among Regional Results**

	State Total Fall 2005 Base: 449	Region			
		Metro 113 a	NCW 102 b	Southern 121 c	NE 113 d
<b>Activities:</b>					
<u>General (checked one or more of the following)</u>	82%	70%	94%acd	82%a	82%a
Dining out	62	50	62	66a	70a
Nightlife or evening entertainment	21	14	29a	18	23
Sightseeing or driving for pleasure	19	11	34acd	12	22a
Casino gaming	17	11c	44acd	4	13c
Taking in city sites	16	15	9	21b	16
Driving on designated scenic byways	13	5	14a	13a	19a
<u>Shopping (checked one or more of the following)</u>	53%	56%	69%acd	45%	43%
For gifts or souvenirs	26	16	46acd	23	21
At the Mall of America	13	32bcd	15cd	5	2
Arts, crafts, or antiques	13	4	17acd	7	7
Outlet shopping	10	9	17cd	7	7
<u>Visiting (checked one or more of the following)</u>	52%	45%	70%ac	47%	49%
Friends or relatives	36	28	50acd	35	31
State or national parks	10	4	23acd	4	12ac
Amusement parks or carnivals	9	17cd	13cd	5	4
Historic sites	8	2	11a	9a	12a
Art museums	5	4	11cd	3	3
Other museums	6	3	8	3	12ac
Outdoor water parks	3	3	9acd	1	2
<u>Attending (checked one or more of the following)</u>	41%	51%b	33%	36%	42%
Fairs or festivals	23	45bcd	13	17	16
Amateur sporting events	10	1	7a	12a	18ab
Popular music concerts or shows	6	4	11d	6	2
Professional sporting events	5	4	3	2	12abc
<u>Participating In (checked one or more of the following)</u>	39%	16%	59%acd	45%a	40%a
Pool swimming	14	4	23ac	10	20ac
Hiking	10	6	14	7	15ad
Biking	9	4	6	21abd	4
Fishing	8	4	15ac	6	8
Lake or river swimming	5	3	12acd	2	4
Wildlife viewing or bird watching	4	1	10ac	3	4
Golfing	4	1	8a	4	4
Motor boating/water skiing	3	1	7ac	1	3
Jet skiing	2	0	8cd	1	1

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